



SMART

**Performance
Management**

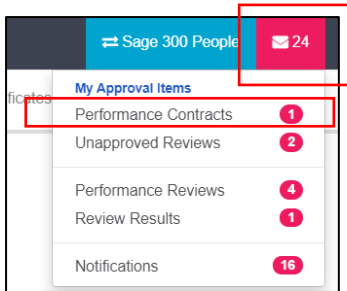
Manager Guide

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SECTION 1: PERFORMANCE CONTRACTING

Performance Contracting is the process by which an Employee and Manager agrees on the KPI's that will be considered in the Employee's Performance Reviews for the next performance cycle. The Employee will be rated on these agreed-upon KPI's.

1. After the HR team has initiated the process, a *Performance Contract* item will appear in your ESS. Click on the inbox item, then click on the Performance Contract line item.



2. The following screen will appear.

Emp Code	Employee Name	Contract Name	Cycle Start	Cycle End	Status
TEST00111	Dr t test	TEST Finance Department Performance Management	1 Oct 2019	30 Apr 2020	Initiated

3. Look out for the contract with a status of *Initiated*. Click on the line to open the contract.

Emp Code	Employee Name	Contract Name	Cycle Start	Cycle End	Status
TEST00111	Dr t test	TEST Finance Department Performance Management	1 Oct 2019	30 Apr 2020	Initiated

4. The following screen will appear.

The screenshot shows the 'Performance Contract - 2034 - Dr t test' screen. On the left is an 'Inbox' sidebar with 'My Approval Items' and 'My Submitted Items'. The main area is split into two columns: 'Original Contract' and 'Proposed Changes'. Both columns show a comparison of Key Performance Area, Weight, Strategic Objective, Key Performance Indicator, and Sub Key Performance Indicator. The 'Original Contract' and 'Proposed Changes' columns are identical in this view. At the bottom, there are buttons for 'Cancel', 'Save and close', and 'Submit'.

Interpreting the Performance Contract:

The screenshot shows the Sage 300 People Performance Contract interface. The left-hand side contains a navigation menu with sections like 'Inbox', 'My Approval Items', and 'My Submitted Items'. The main content area is titled 'Performance Contract - 2034 - Dr t test'. It is divided into three tabs: 'Summary', 'Original Contract', and 'Proposed Changes'. The 'Summary' tab is highlighted with a red box and an arrow pointing to the text below. The 'Original Contract' and 'Proposed Changes' tabs are also highlighted with red boxes and arrows pointing to the text below. The 'Original Contract' and 'Proposed Changes' sections show detailed views of a specific performance item, including key performance areas, strategic objectives, and indicators.

Use the *Summary* tab on the left-hand side of the screen to navigate through the performance contract. Click each line to open the next performance item.

The *Original Contract* represents the Job Description that is currently loaded in the back end of the system.

The *Proposed Changes* section is where you will edit the performance contract. This is what the Employee will see once you have submitted the performance contract.

5. Navigate from one KPI to the next by using the Summary tab on the left-hand side of the screen.

Summary	
Performance + ^	
Perspective: Internal Proce...	10%
Company Policies	
Digicall Policy and Procedure	100%
Perspective: Internal Proce...	70%
Operational	
Prompt Call Answering	14%
Asking relevant questions	14%
Book the Boardroom and kep...	22%
Direct service providers to ap...	14%
Use a professional, pleasant ...	22%
Attentive listening to take acc...	14%
Perspective: Customer	15%
Portray good image to customer	
Physical appearance and tele...	100%
Perspective: Learning and ...	5%
Learning and Development	

This indicates the weight of the Perspective section. The weight of all Perspective sections should always add to 100

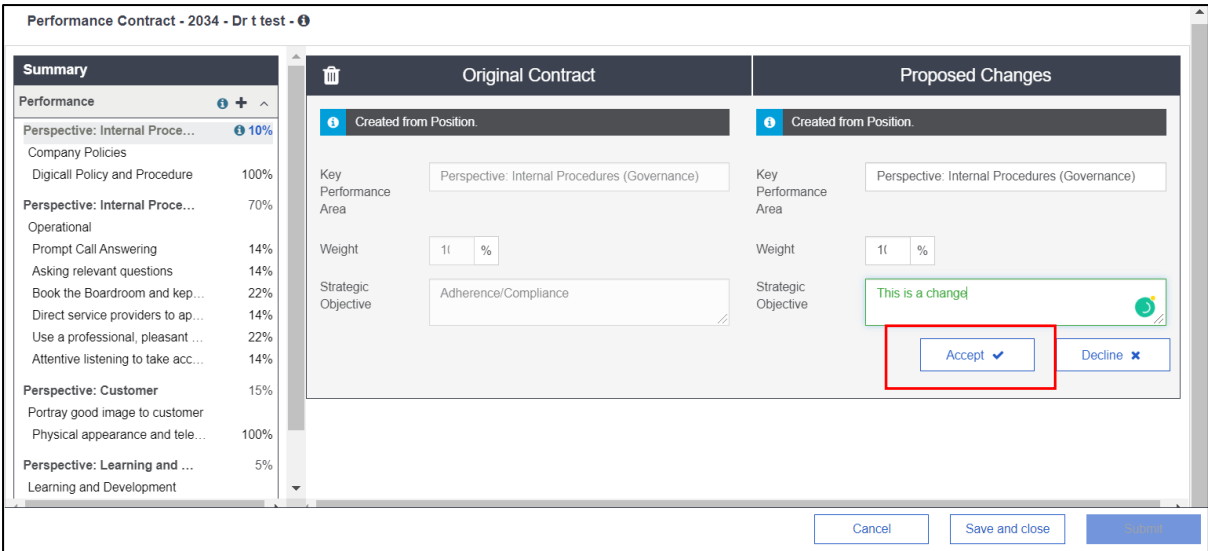
This indicates the weight of the KPI. The weight of all the KPI's in the same section should add to 100

- Managers can make changes to the performance contract by clicking in any field in the *Proposed Changes* section and deleting or altering the text. Any changes made to the original contract will be highlighted in green.

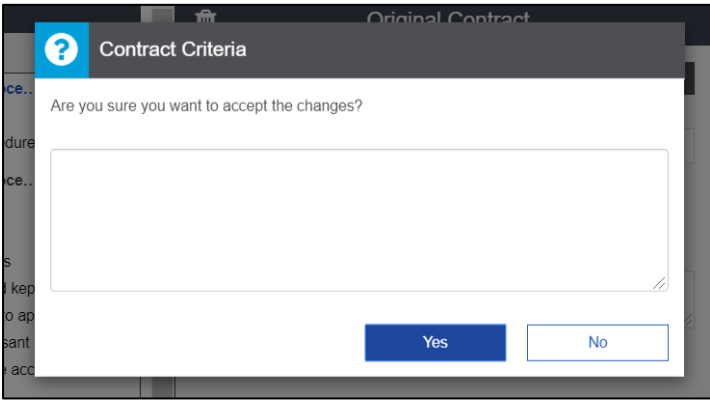
Performance Contract - 2034 - Dr t test

Summary	Original Contract	Proposed Changes
Performance	Created from Position.	Created from Position.
Perspective: Internal Proce... 10%	Key Performance Area: Perspective: Internal Procedures (Governance)	Key Performance Area: Perspective: Internal Procedures (Governance)
Company Policies	Weight: 10 %	Weight: 10 %
Digicall Policy and Procedure 100%	Strategic Objective: Adherence/Compliance	Strategic Objective: This is a change
Perspective: Internal Proce... 70%		Accept Decline
Operational		
Prompt Call Answering 14%		
Asking relevant questions 14%		
Book the Boardroom and kep... 22%		
Direct service providers to ap... 14%		
Use a professional, pleasant ... 22%		
Attentive listening to take acc... 14%		
Perspective: Customer 15%		
Portray good image to customer		
Physical appearance and tele... 100%		
Perspective: Learning and ... 5%		
Learning and Development		

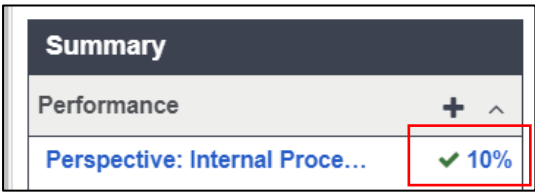
- Accept the change that you made by click on the *Accept* button that appears below the field that you altered.



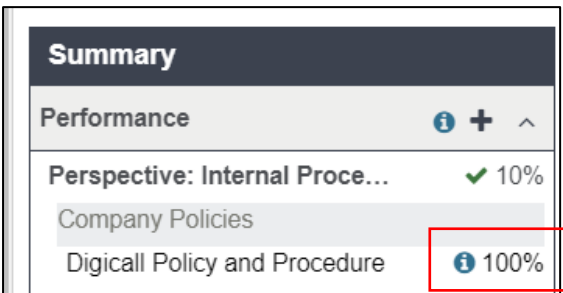
The following pop-up will appear. Confirm the change by clicking on Yes.



8. You will notice that all KPIs that were changed will now have a green checkmark next to them in the *Summary* tab.

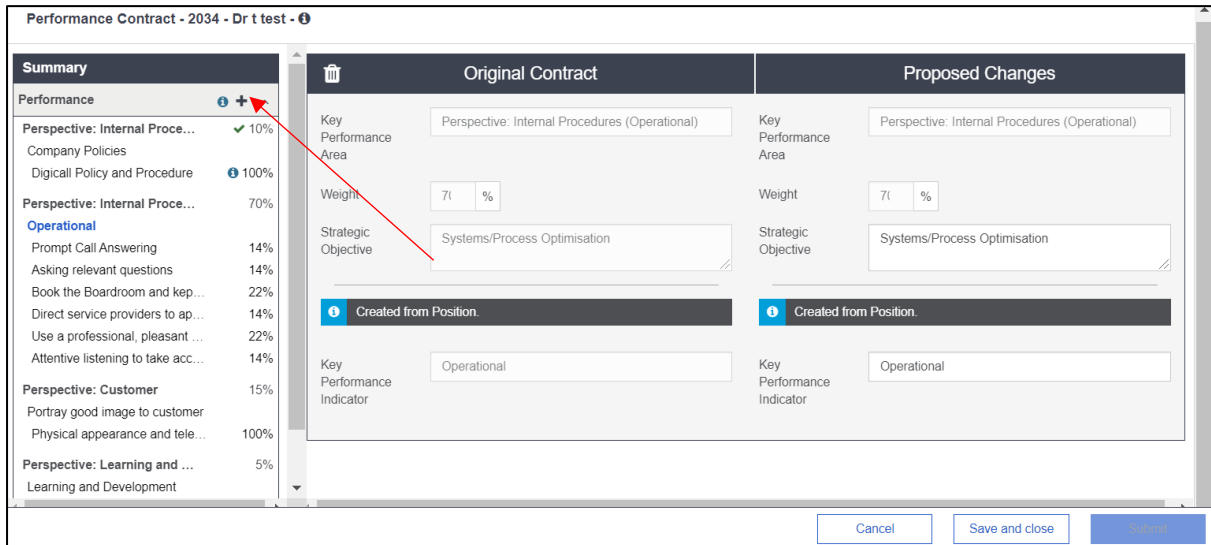


If you made changes to a KPI without clicking *Accept*, the Summary tab will look as follows (blue i icon). You will not be able to submit the performance contract without going back and accepting the change.

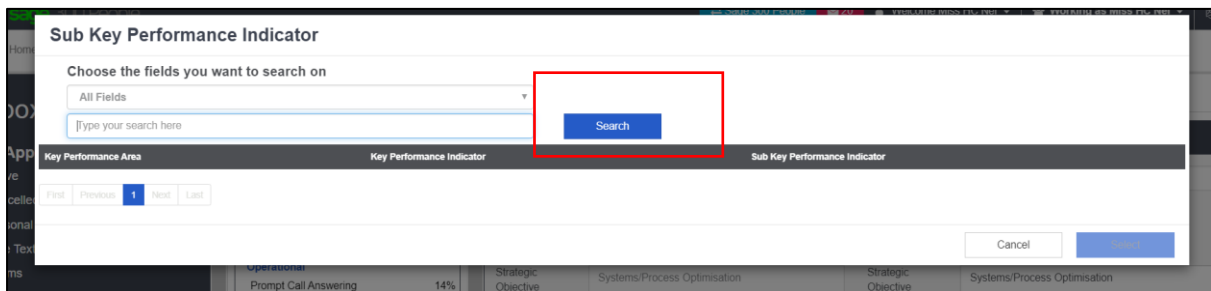


9. You can also add or remove KPI's:

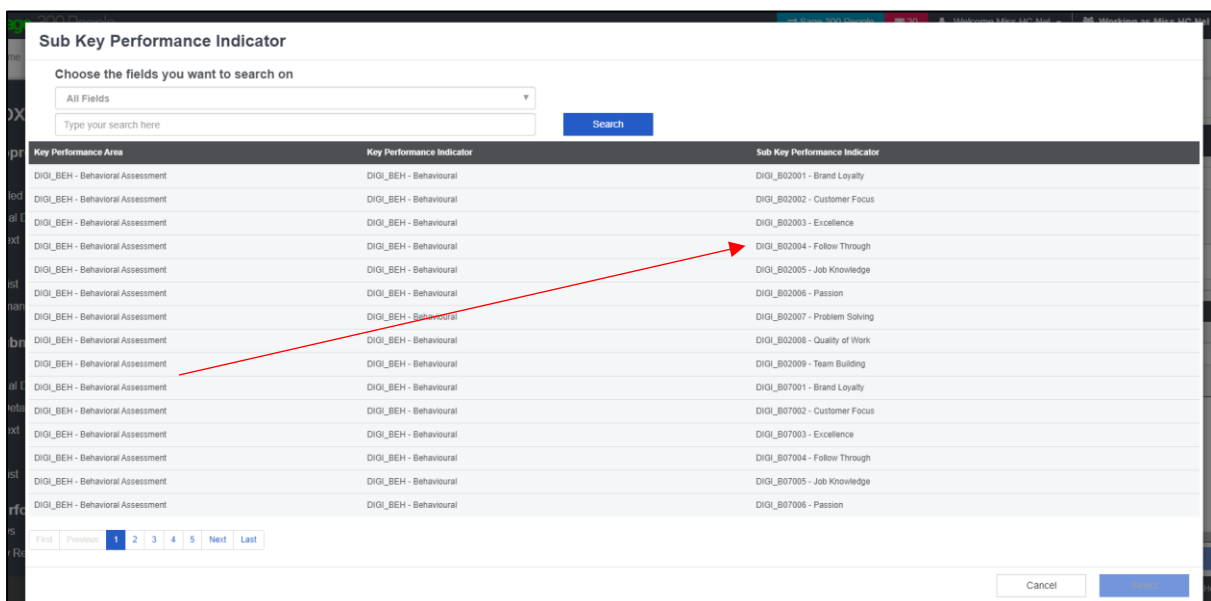
Add KPI's by clicking on the plus icon next to *Performance* on the summary tab.



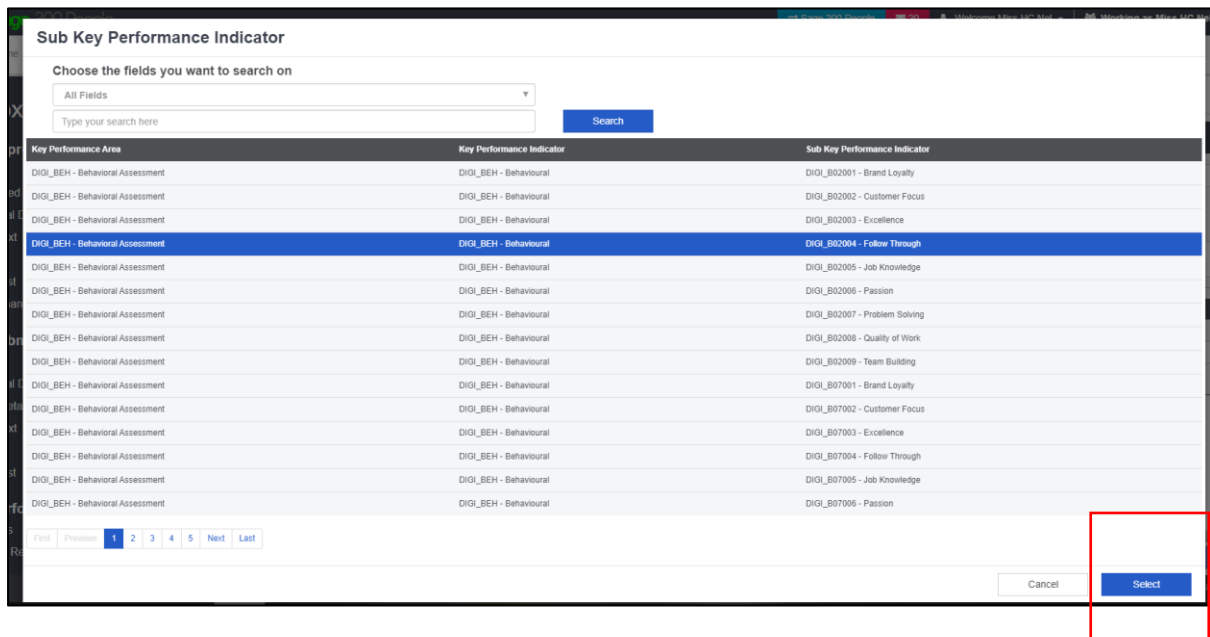
The following screen will appear. Click on Search.



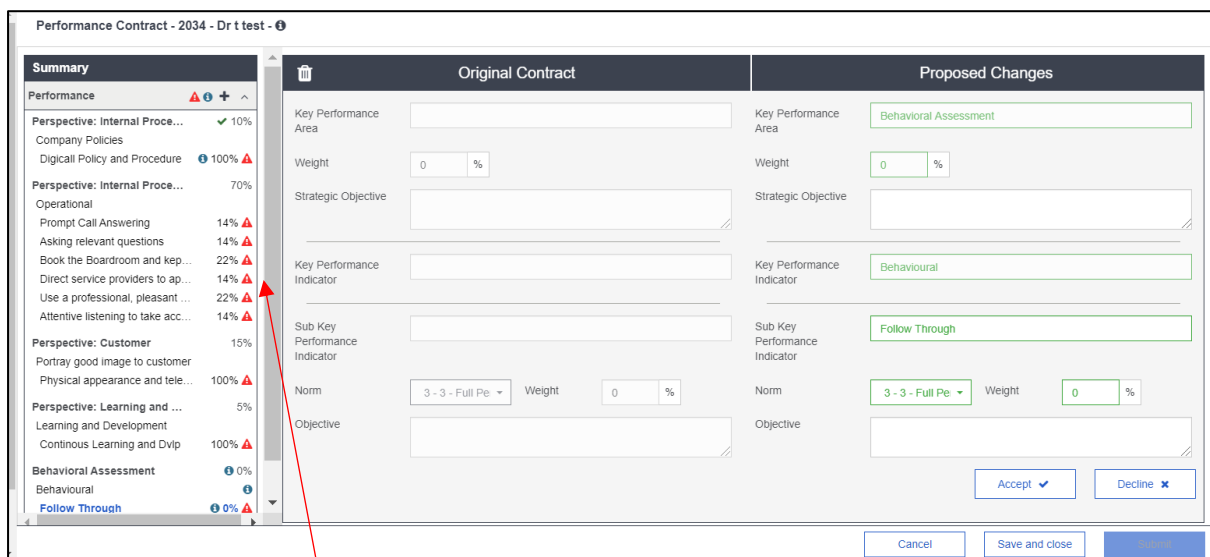
A list of all KPI's that are currently loaded on the system will appear.



Click on the KPI that you would like to add, then click on *Select*. Please note, if you want to add a KPI that has not been pre-defined on this list, search for 'Free Text' and a list of blank KPI's will appear that you can add and edit.



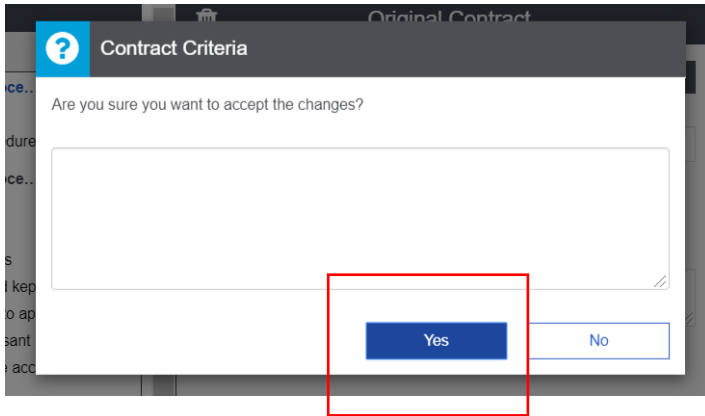
The following screen will appear.



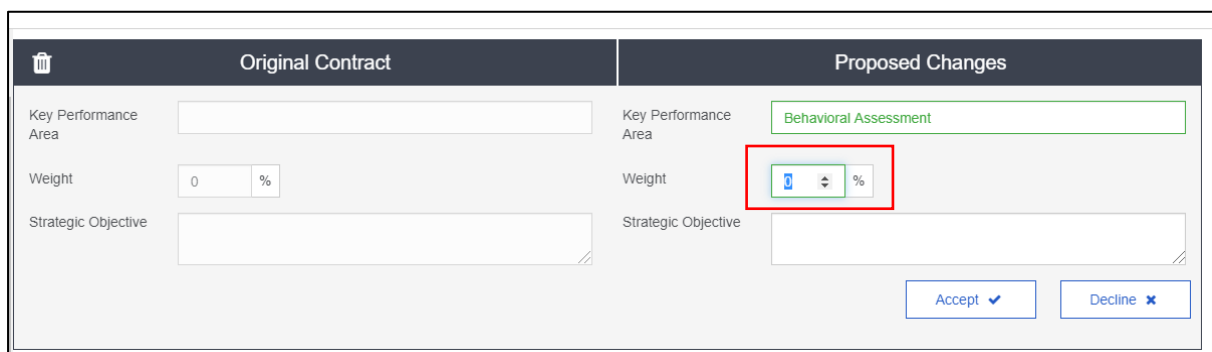
You will notice that:

- The *Summary* tab has red errors. This is because the weight of the KPI needs to be specified so that all *Perspective* sections add up to 100, and the KPI's for each section (perspective) should also add up to 100.
- The *Proposed Changes* section is completely green as the entire KPI is new. You will need to *Accept* the KPI to submit the performance contract.

Click on *Accept*, then select *Yes* to confirm.



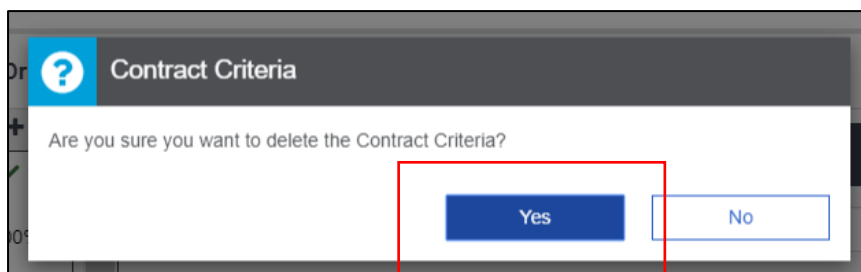
Change the weight by highlighting the field and enter the new weight (you can type in the weight or use the arrow buttons to increase/decrease the weight).



Remove KPI's by selecting the KPI that you want to remove, then clicking on the delete button in the left corner of the KPI.



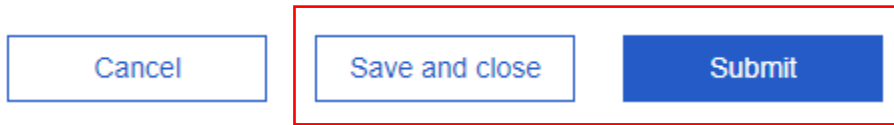
Confirm the deletion by clicking Yes.



10. After you have edited the performance contract as needed, you can either *Save and Close* or *Submit* the contract.

- **Save and Close:** This option will save the contract but keep it in your inbox so that you can access it later.

- **Submit:** This option will submit the contract as final and remove it from your inbox completely.
- **Cancel:** This will cancel all the changes you made to the contract but still keep the contract in your inbox.



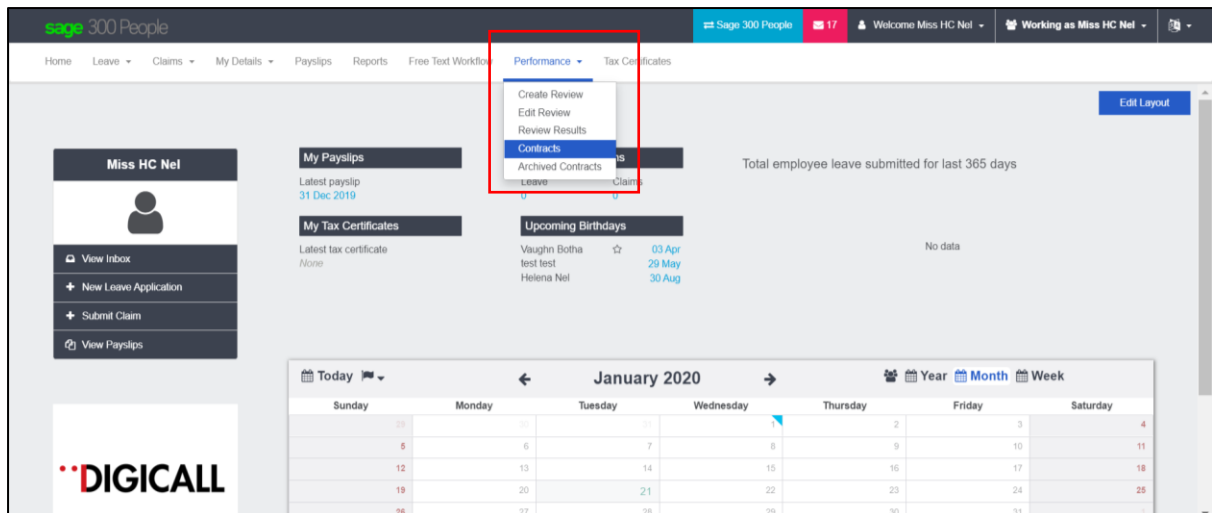
Process Notes

1. After you have edited the performance contract, **Submit** the contract to send it to the Employee for review and editing.
2. After the Employee has completed their suggested changes, the contract will be returned to your inbox, flagging the Employee's suggested changes for you to **Accept** or **Decline**.
3. At this point, have your **Contracting Discussion** where you and the Employee discuss his/her suggested changes and agree on the final version of the **Performance Contract**. **Submit** after you have reached agreement.
4. Lastly, the final version of the **Performance Contract** will go the Employee so that they can agree to it. If the Employee checks the contract and **Submits** without making further changes, the contract will be **Approved**. If the Employee makes changes at this point, the contract will be returned to you to **Accept** or **Decline** the suggested changes.
5. This last step may continue, until the Employee **Submits** the contract without making any changes.

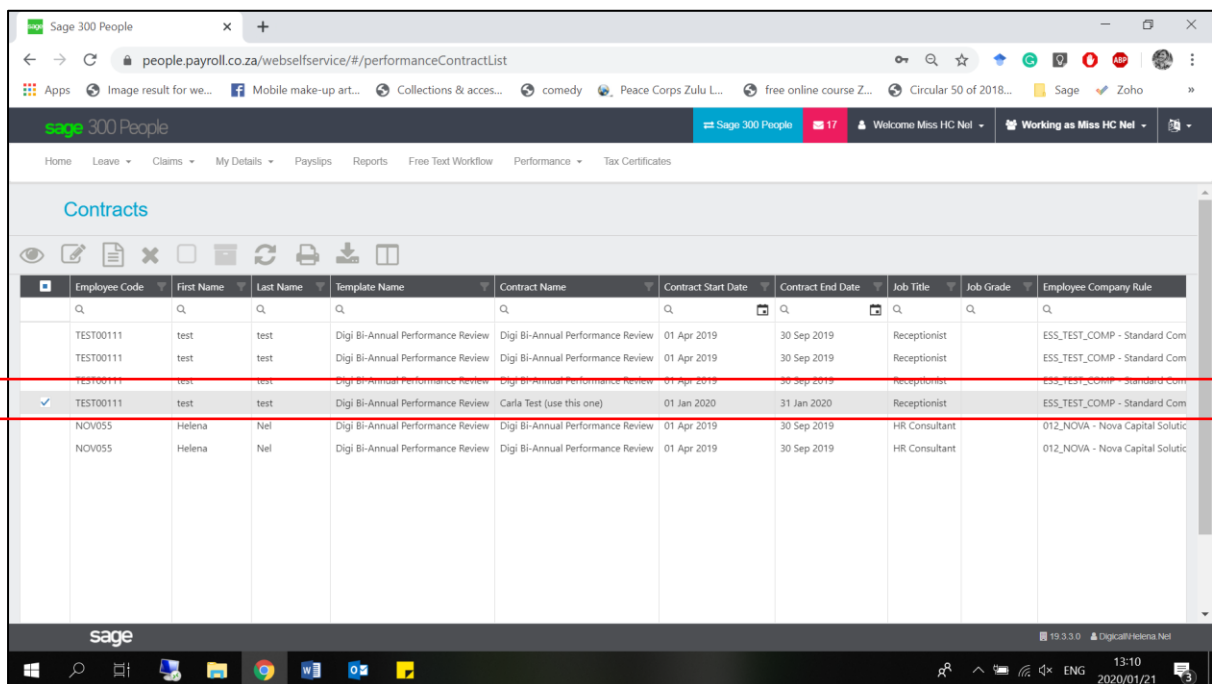
SECTION 2: CREATE A REVIEW

Sage 300 gives Managers the freedom to take full ownership of the creation of reviews. The Digicall Group has two mandatory, bi-annual reviews (March and October reviews) that Managers have to create. In addition, Managers can create reviews as needed, e.g. quarterly reviews or monthly reviews.

1. Click on the Performance Tab, Select *Contracts*.



2. Search for the appropriate Employee's contract and click on the line.



Tip: You can select multiple contracts by checking the boxes on the left-hand side of each contract.

The screenshot shows the Sage 300 People web interface. The browser address bar displays 'people.payroll.co.za/webselfservice/#/performanceContractList'. The page title is 'Contracts'. Below the title is a toolbar with various icons. The main content is a table with the following columns: Employee Code, First Name, Last Name, Template Name, Contract Name, Contract Start Date, Contract End Date, Job Title, Job Grade, and Employee Company Rule. The table contains several rows of data, with the first five rows highlighted by a red box.

Employee Code	First Name	Last Name	Template Name	Contract Name	Contract Start Date	Contract End Date	Job Title	Job Grade	Employee Company Rule
TE00111	test	test	Digi Bi-Annual Performance Review	Digi Bi-Annual Performance Review	01 Apr 2019	30 Sep 2019	Receptionist		ESS_TEST_COMP - Standard Com
TE00111	test	test	Digi Bi-Annual Performance Review	Digi Bi-Annual Performance Review	01 Apr 2019	30 Sep 2019	Receptionist		ESS_TEST_COMP - Standard Com
TE00111	test	test	Digi Bi-Annual Performance Review	Digi Bi-Annual Performance Review	01 Apr 2019	30 Sep 2019	Receptionist		ESS_TEST_COMP - Standard Com
TE00111	test	test	Digi Bi-Annual Performance Review	Carla Test (use this one)	01 Jan 2020	31 Jan 2020	Receptionist		ESS_TEST_COMP - Standard Com
NOV055	Helena	Nel	Digi Bi-Annual Performance Review	Digi Bi-Annual Performance Review	01 Apr 2019	30 Sep 2019	HR Consultant		012_NOVA - Nova Capital Solutio


Note: The contract status should be *Approved* – check the status by scrolling to the far right-hand columns. Tip: First scroll down (use the big vertical scroll bar on the right-hand side of the screen) and then to the right (use the horizontal narrow scroll bar on the bottom of the screen).

The screenshot shows the same Sage 300 People web interface as above. Red arrows and text provide instructions on how to scroll to the far right-hand columns. A red box highlights the bottom horizontal scroll bar and the right vertical scroll bar. The text 'Second, Scroll Right' is positioned near the horizontal scroll bar, and 'First, Scroll Down' is positioned near the vertical scroll bar.

Employee Code	First Name	Last Name	Template Name	Contract Name	Contract Start Date	Contract End Date	Job Title	Job Grade	Employee Company Rule
TEST00111	test	test	Digi Bi-Annual Performance Review	Digi Bi-Annual Performance Review	01 Apr 2019	30 Sep 2019	Receptionist		ESS_TEST_COMP - Standard Comp
TEST00111	test	test	Digi Bi-Annual Performance Review	Digi Bi-Annual Performance Review	01 Apr 2019	30 Sep 2019	Receptionist		ESS_TEST_COMP - Standard Comp
TEST00111	test	test	Digi Bi-Annual Performance Review	Digi Bi-Annual Performance Review	01 Apr 2019	30 Sep 2019	Receptionist		ESS_TEST_COMP - Standard Comp
TEST00111	test	test	Digi Bi-Annual Performance Review	Carla Test (use this one)	01 Jan 2020	31 Jan 2020	Receptionist		ESS_TEST_COMP - Standard Comp
NOV055	Helena	Nel	Digi Bi-Annual Performance Review	Digi Bi-Annual Performance Review	01 Apr 2019	30 Sep 2019	HR Consultant		012_NOVA - Nova Capital Solutio
NOV055	Helena	Nel	Digi Bi-Annual Performance Review	Digi Bi-Annual Performance Review	01 Apr 2019	30 Sep 2019	HR Consultant		012_NOVA - Nova Capital Solutio

After scrolling, you will see the *Contract Status* (look out for Approved contracts).

Contract End Date	Job Title	Job Grade	Employee Company Rule	Reports To	Employee Date Engaged	Employee Status	Contract Type	Contract Status	Currently Assigned
30 Sep 2019	Receptionist		ESS_TEST_COMP - Standard Company Weekly	NOV055 - Miss HC Nel	01 Mar 2019	New	Subordinate	Closed	
30 Sep 2019	Receptionist		ESS_TEST_COMP - Standard Company Weekly	NOV055 - Miss HC Nel	01 Mar 2019	New	Subordinate	Closed	
30 Sep 2019	Receptionist		ESS_TEST_COMP - Standard Company Weekly	NOV055 - Miss HC Nel	01 Mar 2019	New	Subordinate	Approved	
31 Jan 2020	Receptionist		ESS_TEST_COMP - Standard Company Weekly	NOV055 - Miss HC Nel	01 Mar 2019	New	Subordinate	Approved	
30 Sep 2019	HR Consultant		012_NOVA - Nova Capital Solutions	NOV007 - Mr VB Botha	06 Mar 2019	Active	Own	Closed	
30 Sep 2019	HR Consultant		012_NOVA - Nova Capital Solutions	NOV007 - Mr VB Botha	06 Mar 2019	Active	Own	Approved	

- After selecting the appropriate contract, click on the *Create Review* icon .
Tip: If you hover over each button, it will display the meaning of the button.

Employee	Create Review	Last Name	Template Name	Contract Name	Contract Start Date	Contract End Date	Job Title	Job Grade	Employee Company Rule
TEST00111		test	Digi Bi-Annual Performance Review	Digi Bi-Annual Performance Review	01 Apr 2019	30 Sep 2019	Receptionist		ESS_TEST_COMP - Standard Comp
TEST00111		test	Digi Bi-Annual Performance Review	Digi Bi-Annual Performance Review	01 Apr 2019	30 Sep 2019	Receptionist		ESS_TEST_COMP - Standard Comp
TEST00111		test	Digi Bi-Annual Performance Review	Digi Bi-Annual Performance Review	01 Apr 2019	30 Sep 2019	Receptionist		ESS_TEST_COMP - Standard Comp
TEST00111		test	Digi Bi-Annual Performance Review	Carla Test (use this one)	01 Jan 2020	31 Jan 2020	Receptionist		ESS_TEST_COMP - Standard Comp
NOV055		Helena	Digi Bi-Annual Performance Review	Digi Bi-Annual Performance Review	01 Apr 2019	30 Sep 2019	HR Consultant		012_NOVA - Nova Capital Solution
NOV055		Helena	Digi Bi-Annual Performance Review	Digi Bi-Annual Performance Review	01 Apr 2019	30 Sep 2019	HR Consultant		012_NOVA - Nova Capital Solution

- After clicking on the *Create Review Button*, the following screen will open (see below). You will now need to populate the review selection.

Populating the Review Selection (from left to right).

Review Name	Enter the name of the Review, e.g. January Performance review.
Review Category	Click on the drop-down to select Performance Review as the Review Category.
Review Type	Select from the following options: <ul style="list-style-type: none"> • Annual review • Bi-Annual review • Quarterly review • Discretionary review • Probationary Review
Cycle Start Date	Click on the calendar button in the field to select the start date for the review. The date ranges refer to the performance period that you are assessing, e.g. for a monthly review, the dates will range from the 1 st to the 31 st of a month. <u>NB Dates for Bi-Annual Reviews for Bonuses and Increases:</u> For the March increase review: 1 November (Cycle Start Date) to 31 March (Cycle End Date) For the October bonus Review: 1 April (Cycle Start Date) to 31 October (Cycle End Date).
Cycle End Date	Click on the calendar button in the field to select the end date for the review. Tip: The review will still be available after the end date has been reached.
Review Completed By	Click on the calendar button in the field to select the date that the review should be completed. Tip: This date will also display in the email notification sent to the Employee (e.g. please complete your review by [Review Completed By] date).
Issue date	Click on the calendar button in the field to select the issue date of the review (use today's date).
Review Weight	Enter the weight of the review (you can either use the up and down arrows to increase or decrease the weights, or you can highlight the field and type in the weight). At the end of each performance cycle, the system will work out the average for all the reviews (as per their Review Weights) so that a final Contract Score is available.

5. After completing the review selection, you will now complete the *Reviewers* section.

Review Selection

Review Name: January Review | Review Category: Performance Review | Review Type: Discretionary

Cycle Start Date: 01 Jan 2020 | Cycle End Date: 31 Jan 2020 | Review Completed By: 31 Jan 2020

Issue Date: 21 Jan 2020 | Review Weight: 0

Reviewers

Q Add Additional Reviewers

Selection	Use	Overall Weight	Self	Weight	Owner	Weight	Overall Weight
Competency	<input type="checkbox"/>						
Key Performance	<input type="checkbox"/>						
Values	<input type="checkbox"/>						
Free Text 1	<input type="checkbox"/>						
Free Text 2	<input type="checkbox"/>						
Free Text 3	<input type="checkbox"/>						
Free Text 4	<input type="checkbox"/>						
Overall Weight		0					

Buttons: Load Employees, Cancel, Save

Populating the Review Selection.

Add Additional Reviewers

Should you need the Employee to be rated by an additional rater (i.e. someone other than yourself and the Employee), you can click on the Add Additional Reviewers field.

Q Add Additional Reviewers

A search bar will pop up, click on Search to see all Employees that can be added as Additional Reviewers.

Search

Choose the fields you want to search on

All Fields

[Type your search here]

Search

Employee Code	Display Name	Title	Initials	Known As
First	Person	1	New	Last

Select the Employee that you want to add and click on the Select button on the bottom right-hand side of the popup.

Select

You will see that an additional column with the name of the Additional Reviewer has now been added to the Reviewers section.

Review Selection

Review Selection

Review Name: January Review Review Category: Performance Review Review Type: Discretionary

Cycle Start Date: 01 Jan 2020 Cycle End Date: 31 Jan 2020 Review Completed By: 31 Jan 2020

Issue Date: 21 Jan 2020 Review Weight: 0

Reviewers

Q Add Additional Reviewers

Selection	Use	Overall Weight	Self	Weight	Owner	Weight	Mr A Dangarembizi	Weight	Overall Weight
Competency	<input type="checkbox"/>						<input type="checkbox"/>		
Key Performance	<input type="checkbox"/>						<input type="checkbox"/>		
Values	<input type="checkbox"/>						<input type="checkbox"/>		
Free Text 1	<input type="checkbox"/>						<input type="checkbox"/>		
Free Text 2	<input type="checkbox"/>						<input type="checkbox"/>		
Free Text 3	<input type="checkbox"/>						<input type="checkbox"/>		
Free Text 4	<input type="checkbox"/>						<input type="checkbox"/>		
Overall Weight		0							

Load Employees Cancel

Populating the Review Selection (continued, from left to right)

Key Performance

Under the Selection heading, we will only be using Key Performance. Tick the checkbox under the Use column that corresponds to the Key Performance row

Reviewers

Q Add Additional Reviewers

Selection	Use	Overall Weight	Self	Weight	Owner	Weight	Mr A Dangarembizi	Weight	Overall Weight
Competency	<input type="checkbox"/>						<input type="checkbox"/>		
Key Performance	<input checked="" type="checkbox"/>	0	<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>		
Values	<input type="checkbox"/>						<input type="checkbox"/>		
Free Text 1	<input type="checkbox"/>						<input type="checkbox"/>		
Free Text 2	<input type="checkbox"/>						<input type="checkbox"/>		
Free Text 3	<input type="checkbox"/>						<input type="checkbox"/>		
Free Text 4	<input type="checkbox"/>						<input type="checkbox"/>		
Overall Weight		0							

Key Performance (row)

In the same row, enter 100 under the Overall Weight Column.
 Tick Self (this indicates that we would like the Employee to do a self-rating) and enter the Weight as zero (0). Employee scores are specified as zero because we want to give them input in the process, however, the final decision still lies with the Manager.

Tick Owner (this indicates that we would like the Manager to rate the Employee) and enter the Weight as 100. Note: If additional raters were added, the Manager weight needs to be specified as zero, and the additional reviewer can be specified as 100%. Should you need assistance with regards to the review weights, please contact your HR team.

If you have additional reviewers, you can tick the checkbox under their name and assign a weight to their rating as well.

NB The Overall Weight field should always add up to 100.

Selection	Use	Overall Weight	Self	Weight	Owner	Weight	Mr A Dangarembizi	Weight	Overall Weight
Competency	<input type="checkbox"/>								
Key Performance	<input checked="" type="checkbox"/>	100	<input checked="" type="checkbox"/>	0	<input checked="" type="checkbox"/>	100	<input checked="" type="checkbox"/>	0	100
Values	<input type="checkbox"/>								
Free Text 1	<input type="checkbox"/>								
Free Text 2	<input type="checkbox"/>								
Free Text 3	<input type="checkbox"/>								
Free Text 4	<input type="checkbox"/>								
Overall Weight		100							

6. After completing all the information on the review selection screen, click on *Load Employees* on the bottom right-hand side of the screen.

Review Selection

Review Selection

Review Name: January Review | Review Category: Performance Review | Review Type: Discretionary

Cycle Start Date: 01 Jan 2020 | Cycle End Date: 31 Jan 2020 | Review Completed By: 31 Jan 2020

Issue Date: 21 Jan 2020 | Review Weight: 0

Reviewers

Selection	Use	Overall Weight	Self	Weight	Owner	Weight	Mr A Dangarembizi	Weight	Overall Weight
Competency	<input type="checkbox"/>								
Key Performance	<input checked="" type="checkbox"/>	100	<input checked="" type="checkbox"/>	0	<input checked="" type="checkbox"/>	100	<input checked="" type="checkbox"/>	0	100
Values	<input type="checkbox"/>								
Free Text 1	<input type="checkbox"/>								
Free Text 2	<input type="checkbox"/>								
Free Text 3	<input type="checkbox"/>								
Free Text 4	<input type="checkbox"/>								
Overall Weight		100							

Buttons: Load Employees, Cancel, Create

The Employees whose contracts were initially selected will now appear as tabs on the top part of the screen. Note: If multiple contracts (for multiple Employees) were selected, all the Employee names would have displayed as tabs.

Review Selection

Review Selection | **Dr 1 test**

Review Name: January Review | Review Category: Performance Review | Review Type: Discretionary

Cycle Start Date: 01 Jan 2020 | Cycle End Date: 31 Jan 2020 | Review Completed By: 31 Jan 2020

Issue Date: 21 Jan 2020 | Review Weight: 0


Reviewers

Selection	Use	Overall Weight	Self	Weight	Owner	Weight	Mr A Dangarembizi	Weight	Overall Weight
Competency	<input type="checkbox"/>								
Key Performance	<input checked="" type="checkbox"/>	100	<input checked="" type="checkbox"/>	0	<input checked="" type="checkbox"/>	100	<input checked="" type="checkbox"/>	0	100
Values	<input type="checkbox"/>								
Free Text 1	<input type="checkbox"/>								
Free Text 2	<input type="checkbox"/>								
Free Text 3	<input type="checkbox"/>								
Free Text 4	<input type="checkbox"/>								
Overall Weight		100							

Buttons: Load Employees, Cancel, Create

Notification: Employee(s) Loaded

You can now click on each Employee's separate tab and make changes to the review selection for specific Employees. This is useful in cases where a Manager has to create reviews for several Employees, but where only one Employee needs *Additional Reviewers*. (Note: If dates were entered incorrectly (cycle start date & cycle end date), there would be an **error!** next to the

Employees' name. If this is the case, you can click on the delete icon  on the tab next to the Employee name, fix the error, and click on load Employees again.

Dr t test

Review Selection Dr t test

Review Selection

Review Name: January Review Review Category: Performance Review Review Type: Discretionary

Cycle Start Date: 01 Jan 2020 Cycle End Date: 31 Jan 2020 Review Completed By: 31 Jan 2020

Issue Date: 21 Jan 2020 Review Weight: 0

Reviewers

Q Add Additional Reviewers

Selection	Use	Overall Weight	Self	Weight	Owner	Weight	Mr A Dangarembizi	Weight	Overall Weight
Competency	<input type="checkbox"/>								
Key Performance	<input checked="" type="checkbox"/>	100	<input checked="" type="checkbox"/>	0	<input checked="" type="checkbox"/>	100	<input checked="" type="checkbox"/>	0	100
Values	<input type="checkbox"/>								
Free Text 1	<input type="checkbox"/>								
Free Text 2	<input type="checkbox"/>								
Free Text 3	<input type="checkbox"/>								
Free Text 4	<input type="checkbox"/>								
Overall Weight		100							

Cancel Create

If you scroll down (use the scroll bar on the right-hand side of the screen), you will also see the Employee's KPA's and KPI's as they will display on the review.

Dr t test

Reviewer Detail

Summary

- Performance
 - Perspective: Internal Proce... 10%
 - Company Policies
 - Digital Policy and Procedure 100%**
 - Perspective: Internal Proce... 70%
 - Operational
 - Prompt Call Answering 14%
 - Asking relevant questions 14%
 - Book the Boardroom and kep... 22%
 - Direct service providers to ap... 14%
 - Use a professional, pleasant ... 22%
 - Attentive listening to take acc... 14%
 - Perspective: Customer 15%
 - Portray good image to customer
 - Physical appearance and tele... 100%
 - Perspective: Learning and ... 5%
 - Learning and Development
 - Continuous Learning and Dvlp 100%

Key Performance Area Perspective: Internal Procedures (Governance)

Weight 10 %

Strategic Objective Adherence/Compliance

Key Performance Indicator Company Policies

Created from Position

Sub Key Performance Indicator Digital Policy and Procedure

Norm DIGI3 - 3 - Full Performer **Weight** 100 %

Objective Comply with and abide by all Policies and Procedures set out by the company and ensure that employees reporting to you do same

Cancel Create

7. Click on *Create* to create a review for the selected Employees.

Reviewer Detail

Summary

Performance

Perspective: Internal Proce...	10%
Company Policies	
Digicall Policy and Procedure	100%
Perspective: Internal Proce...	70%
Operational	
Prompt Call Answering	14%
Asking relevant questions	14%
Book the Boardroom and kep...	22%
Direct service providers to ap...	14%
Use a professional, pleasant ...	22%
Attentive listening to take acc...	14%
Perspective: Customer	15%
Portray good image to customer	
Physical appearance and tele...	100%
Perspective: Learning and ...	5%
Learning and Development	
Continous Learning and Dvlp	100%

Key Performance Area: Perspective: Internal Procedures (Governance)

Weight: 10 %

Strategic Objective: Adherence/Compliance

Key Performance Indicator: Company Policies

Created from Position

Sub Key Performance Indicator: Digicall Policy and Procedure

Norm: DIGI3 - 3 - Full Performer Weight: 100 %

Objective: Comply with and abide by all Policies and Procedures set out by the company and ensure that employees reporting to you do same

Cancel Create

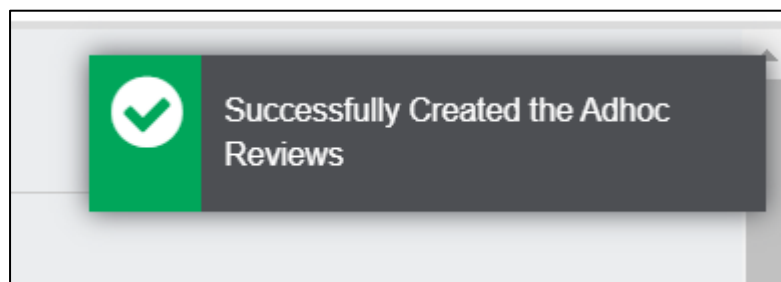
8. Click on Yes to confirm.

Create Adhoc Reviews

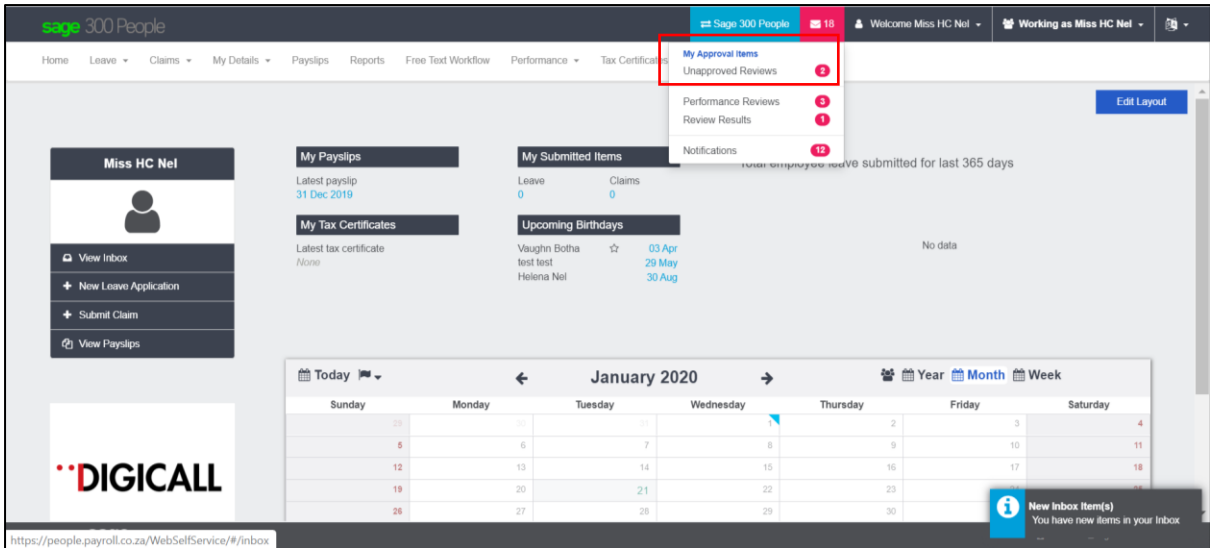
Create the Adhoc Reviews?

Yes No

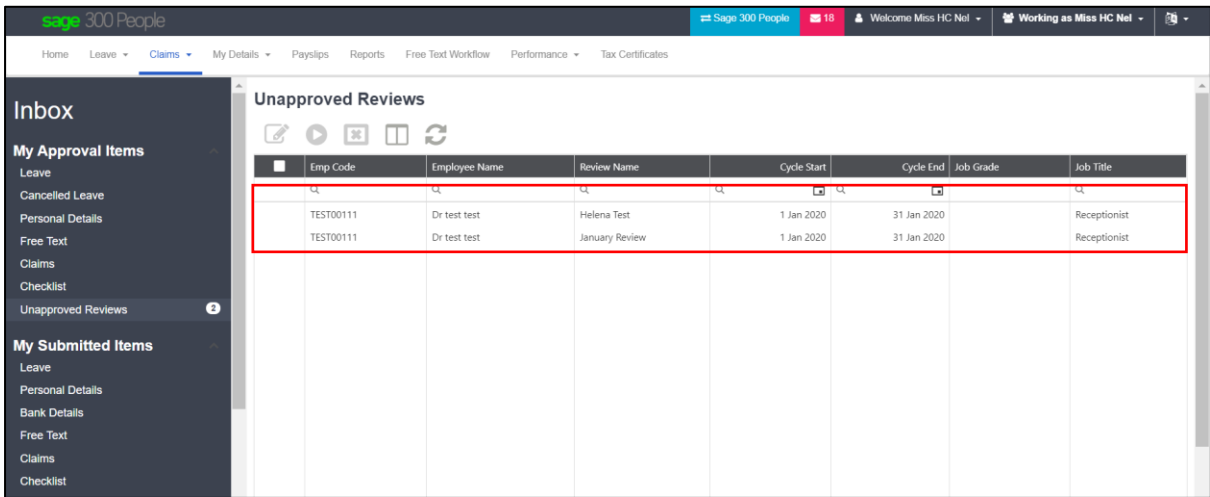
9. You will receive the following notification to confirm the creation of your reviews (top right-hand side of the screen).



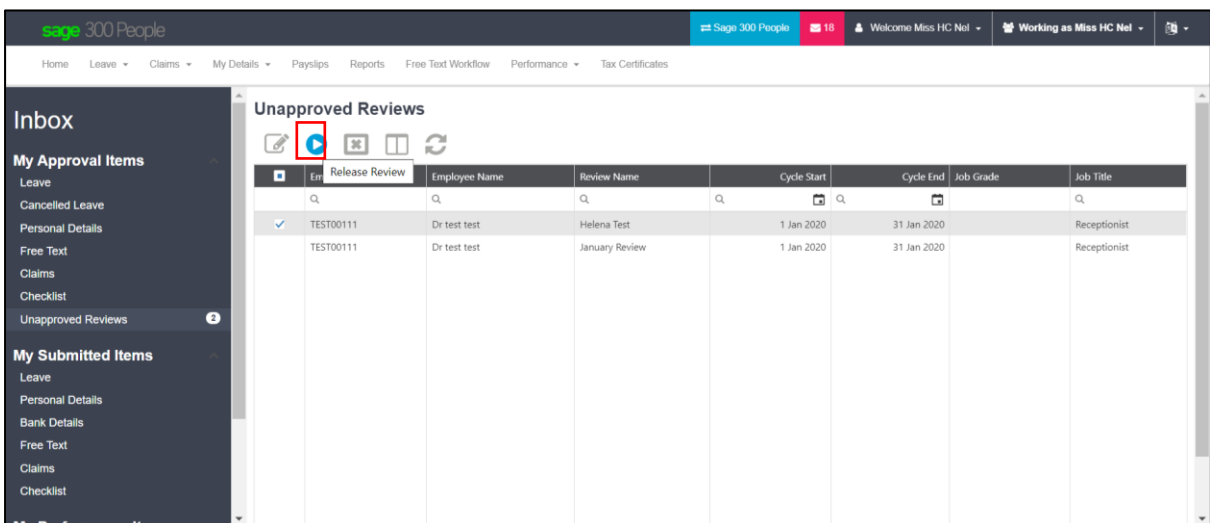
10. Your review has now been created and will show in your inbox as an *Unapproved Review*.
Tip: If you do not see the *Unapproved Review* in your inbox immediately after creating the review, sign out and back in to refresh the system.



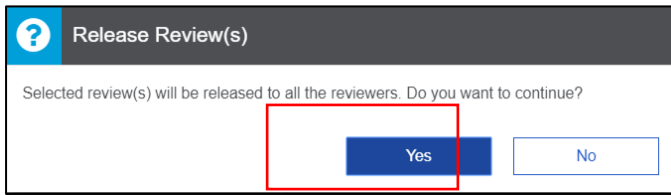
11. Click on the *Unapproved Review* Inbox item. The following screen will open.



12. Now we need to *Release* the review so that it will display as a performance review in the Manager and Employee's inbox. Select the appropriate review, and click on the play button to release the review



13. Click Yes to confirm that the review can be released.



14. The *Unapproved Review* will now show in the Manager and Employee inbox as a Performance Review. It will no longer be available in your inbox as an Unapproved review, as it has now been approved and sent out. Tip: If you do not see the Performance Review in your inbox immediate, sign out and back in to refresh the system.

Go to SECTION 3: COMPLETE A REVIEW to learn more about completing performance reviews.

SECTION 3: COMPLETE A REVIEW

Employees and Managers will receive an email (and WebSS notification) to announce that the performance review is ready for completion. NB Both the Manager and Employee will receive their reviews at the same time, and the process of completing the review is also the same for both.

Note: As a Manager, you may ask the Employee to complete their review first so that you can view their ratings before submitting your own review. To view the Employee's rating, go to SECTION 4: REVIEW RESULTS. To pull reports, go to SECTION 5: REPORTS.

Contract Review Notice

Notification Details

Dear Ena

Please complete the Performance Review for Miss HCN Nel on your Self Service portal by 2019/09/30.

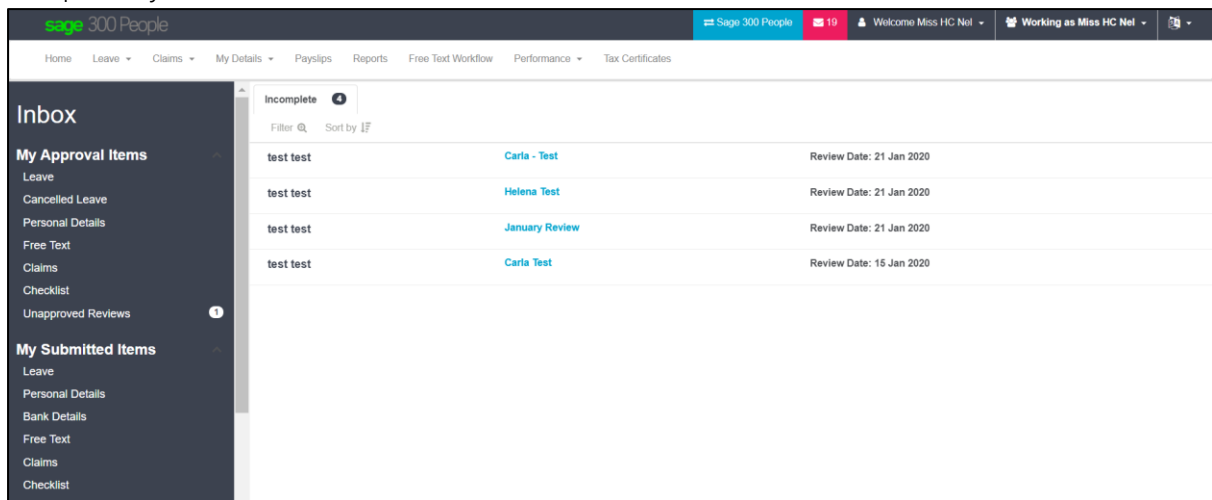
Footnote Information

Kind Regards, Digicall HR Team

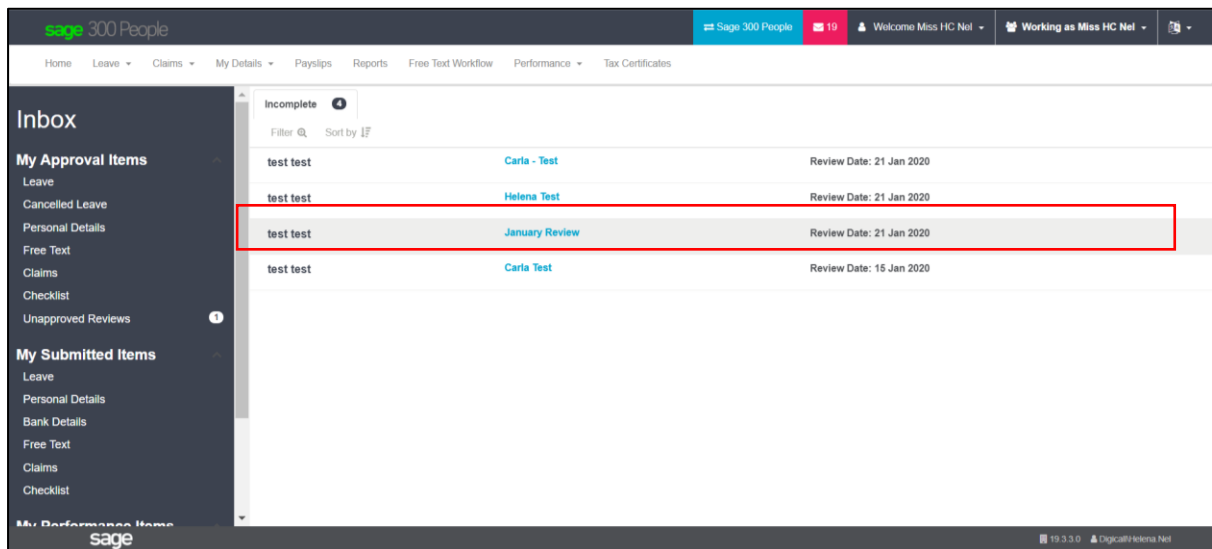
1. Navigate to your inbox and select *Performance Reviews*. Select the applicable review

The screenshot shows the Sage 300 People self-service portal interface. The user is logged in as Miss HC Nel. A notification dropdown menu is open, showing 'Performance Reviews' with a red circle containing the number 3. Other items in the menu include 'Unapproved Reviews' (1), 'Review Results' (1), and 'Notifications' (12). The main dashboard displays various sections: 'Miss HC Nel' profile, 'My Payslips' (Latest payslip: 31 Dec 2019), 'My Tax Certificates' (Latest tax certificate: None), 'My Submitted Items' (Leave: 0, Claims: 0), and 'Upcoming Birthdays' (Vaughn Botha: 03 Apr, test test: 29 May, Helena Nel: 30 Aug). At the bottom, there is a calendar for January 2020 and the Digicall logo.

The following screen will open, with a list of all the performance reviews that have not been completed yet.



2. Click on the review that you want to complete (this could be your own review or a review for an Employee).



3. Use the *Summary* tab on the left-hand side of the screen to navigate to each level of the performance review.

Summary 100 %

Performance ✓

Perspective: Internal Proce...	10%	✓
Company Policies		✓
Digicall Policy and Procedure	100%	✓
Perspective: Internal Proce...	70%	✓
Operational		✓
Prompt Call Answering	14%	✓
Asking relevant questions	14%	✓
Book the Boardroom and kep...	22%	✓
Direct service providers to ap...	14%	✓
Use a professional, pleasant ...	22%	✓
Attentive listening to take acc...	14%	✓
Perspective: Customer	15%	✓
Portray good image to customer		✓
Physical appearance and tele...	100%	✓
Perspective: Learning and ...	5%	✓
Learning and Development		✓
Continuous Learning and Dvlp	100%	✓

Overall Comments

Annotations:

- This indicates the percentage of completion for the whole review
- Always click on the lowest level to rate (the rows indented furthest to the right)
- The green checkbox indicates that the KPI has been completed
- Once the section has been completed, the *Perspective* will also have a green checkbox next to it
- Weight of the section
- Weight of the KPI

Note that you will only be able to score on the lowest level (on the example below, you will not be able to rate on the *Perspective: Internal Procedures* line, nor on the company Policy line, but on the last level of the section, *Digicall Policies and Procedures*).

Performance Contract - Dr t test

Summary 0 %

Perspective: Internal Proce...	10%	<input type="radio"/>
Company Policies		<input type="radio"/>
Digicall Policy and Procedure	100%	<input type="radio"/>
Perspective: Internal Proce...	70%	<input type="radio"/>
Operational		<input type="radio"/>
Prompt Call Answering	14%	<input type="radio"/>
Asking relevant questions	14%	<input type="radio"/>
Book the Boardroom and kep...	22%	<input type="radio"/>
Direct service providers to ap...	14%	<input type="radio"/>
Use a professional, pleasant ...	22%	<input type="radio"/>
Attentive listening to take acc...	14%	<input type="radio"/>
Perspective: Customer	15%	<input type="radio"/>
Portray good image to customer		<input type="radio"/>
Physical appearance and tele...	100%	<input type="radio"/>
Perspective: Learning and ...	5%	<input type="radio"/>
Learning and Development		<input type="radio"/>

Rating Form:

- Sub Key Performance Indicator: Digicall Policy and Procedure
- Weight: 100 %
- Objective: Comply with and abide by all Policies and Procedures set out by the company and ensure that employees reporting to you do same
- Rating:
 - N/A - Not Applicable
 - 1 - Non Performer
 - 2 - Developing Performer
 - 3 - Full Performer
 - 4 - Exceptional Performer
- Actual Result: [Empty field]
- Comment on Review: [Empty field]

Buttons: Cancel, Save and close, Submit

4. Complete the rating by selecting the applicable radio button. Choose from the following list:

- 1 – Non-Performer
- 2 – Developing Performer
- 3 – Full Performer
- 4 – Exceptional Performer

- 1 - Non Performer
- 2 - Developing Performer
- 3 - Full Performer
- 4 - Exceptional Performer

5. The Actual Result field can be used to capture more specific evidence or results for the Employee (e.g. sales targets or a number of calls). However, this field is not mandatory.

Actual Result

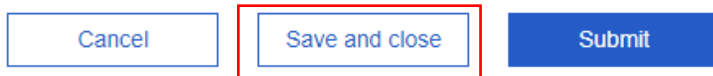
6. Complete the *Comment on Review field* (this will always be a mandatory field, and you will not be able to submit your Review without completing this field for each KPI). Use the *Comment on Review* field to briefly motivate why you gave a specific rating.

Comment on Review

7. Complete overall comments. Provide overall comments on performance in the *Overall Comments* block. Examples of overall comments could include your overall satisfaction with the performance of the Employee, or noting any significant developmental areas that the Employee needs to focus on.

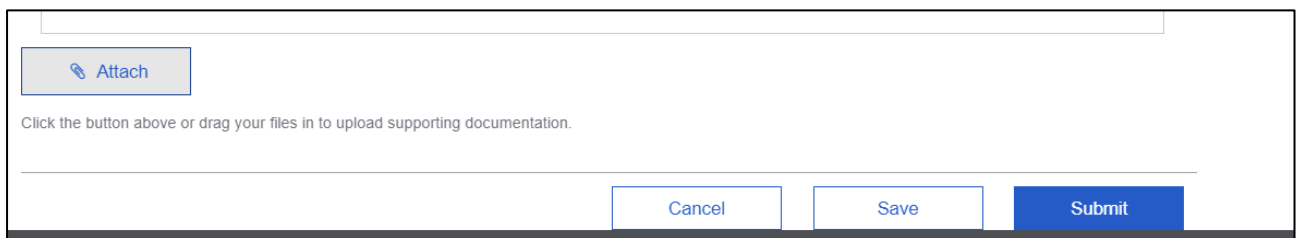
Summary	100 %
Performance ✓	
Perspective: Internal Proce...	10% ✓
Company Policies	✓
Digicall Policy and Procedure	100% ✓
Perspective: Internal Proce...	70% ✓
Operational	✓
Prompt Call Answering	14% ✓
Asking relevant questions	14% ✓
Book the Boardroom and kep...	22% ✓
Direct service providers to ap...	14% ✓
Use a professional, pleasant ...	22% ✓
Attentive listening to take acc...	14% ✓
Perspective: Customer	15% ✓
Portray good image to customer	✓
Physical appearance and tele...	100% ✓
Perspective: Learning and ...	5% ✓
Learning and Development	✓
Continous Learning and Dvlp	100% ✓
Overall Comments 🗨️	

8. When completing the review, it is important to save regularly. Click on *Save and Close* to ensure that your work is not lost (i.e. in case the system times out, or the internet connection is interrupted).



Please note that once the review has been submitted, it will be removed from your inbox completely. If you want to continue working on the review later – please make sure that you select Save and Close and NOT Submit.

9. Add Attachments (if applicable). Any supporting documents or performance evidence can be attached by clicking on the paperclip and attaching the document as you normally would. This is not a mandatory field.



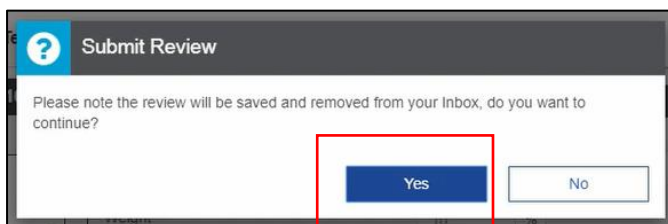
10. Once your review is fully completed, you can Submit the review.

Remember:

- *Save and Close*: This option will save the review and keep it in your inbox for completion later.
- *Submit*: This option will submit the review as final and remove it from your inbox.

*Please note that once the review has been submitted, it will be removed from your inbox completely. It is therefore important to ensure that you are completely satisfied with your ratings before clicking **Submit**.*

11. The following notification will appear. Click on Yes to submit your review.



12. Once both the Manager and Employee have submitted their ratings, the review is now captured and complete.

Now it is time to have your face-to-face discussion with your Employee. You can now use this information to prepare. Go to SECTION 4: REVIEW RESULTS to access the review ratings and comments.

SECTION 4: DEVELOPMENT PLANS

The Development Plan functionality allows you to keep track of your professional development. The development plan is an agreement between the employee and their manager that will allow to load new development items for the employee on his Employee Self Service development plan.




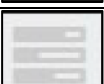



The Development Plan consists of the following sections:

- My Development Plans
- My Completed Items
- Team Development Plans (*for Managers*)

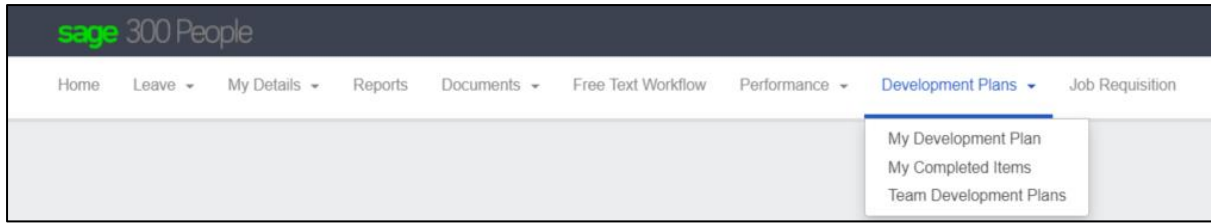
For all other Development Plan items, the Reports To manager will be responsible to approve or decline the specific development items. This information is then provided to the HR team and considered for inclusion in the training plan.

Section 1: My Development Plan

Please note the meaning of the Action buttons that appear on each section:

Icon	Description	Function
	Add	When you add a new item, a detailed development plan screen will open to define the specific developmental item.
	Edit	Edit an existing development item. This functionality is limited on training items which follow a workflow.
	Delete	Delete an existing development item. The delete functionality is limited on training items as these items are submitted to a workflow.
	Status	Update the development item status using this button.
	Export	Export the current list of development items here. All fields will be exported to Excel.
 	Expand / Collapse	Use these buttons to expand or collapse different sections.

1. To log your Development Plan, log into ESS and expand the Development Plans tab. Select My Development Plan.




The following screen will display. Note the different sections to the Development plan below. We will be making use of those highlighted in green (although you can use more of these sections should you choose to do so).

- a) Short Term Goals
- b) Long Term Goals
- c) Performance Development
- d) Current Position Development
- e) Succession Role Development
- f) Personal and Compulsory Development



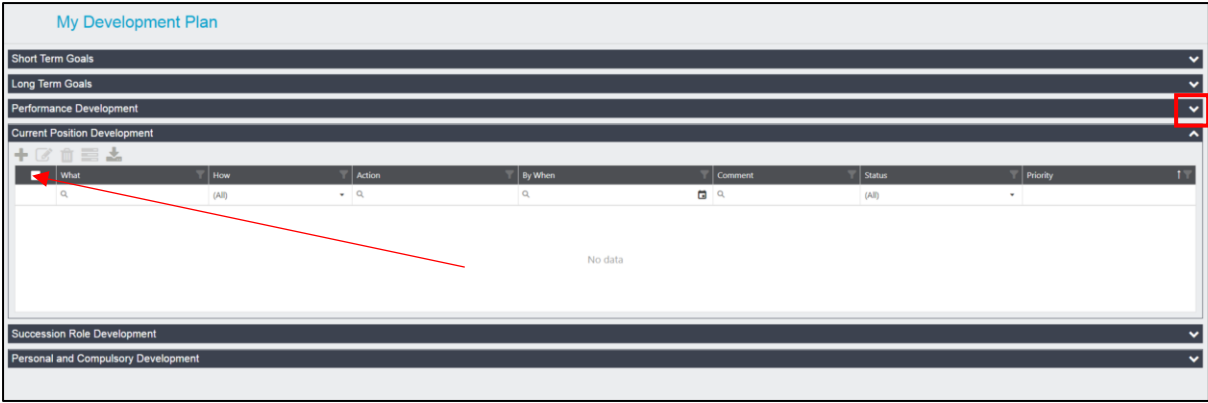
2. Short- and Long-Term Goals

The system will open with the Short- and Long-Term Goals displayed. The user can load his personal goals here. These fields have unlimited characters and will be saved by selecting the Save button at the bottom of the screen. No history will be kept on changes made to the Short

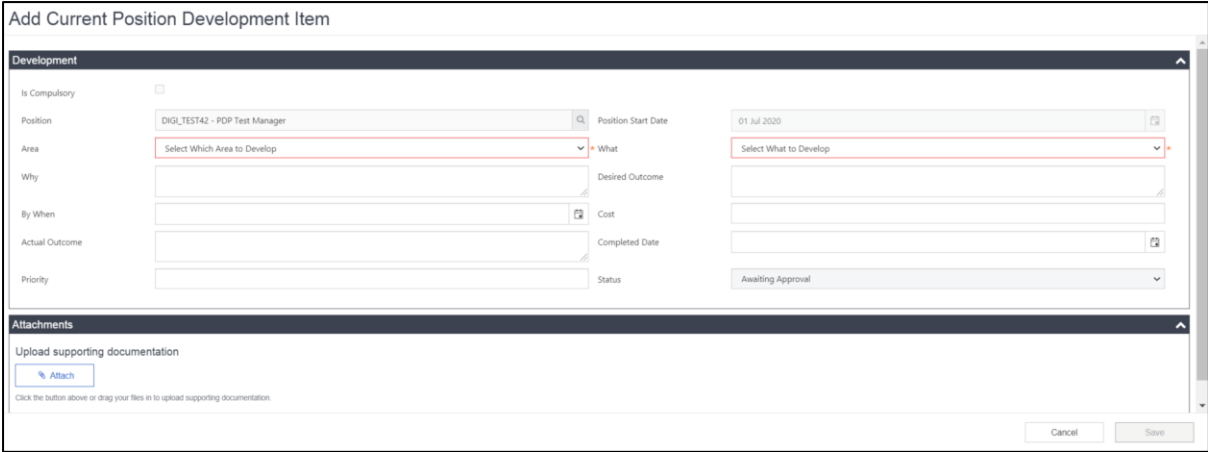
and Long-Term goals. These two sections can be collapsed or expanded by selecting the  icons or by clicking on each header.

3. Performance Development

After completing a Performance Review, capture the developmental areas that you identified in your review here. Expand the Performance Development section. Click on the plus icon.



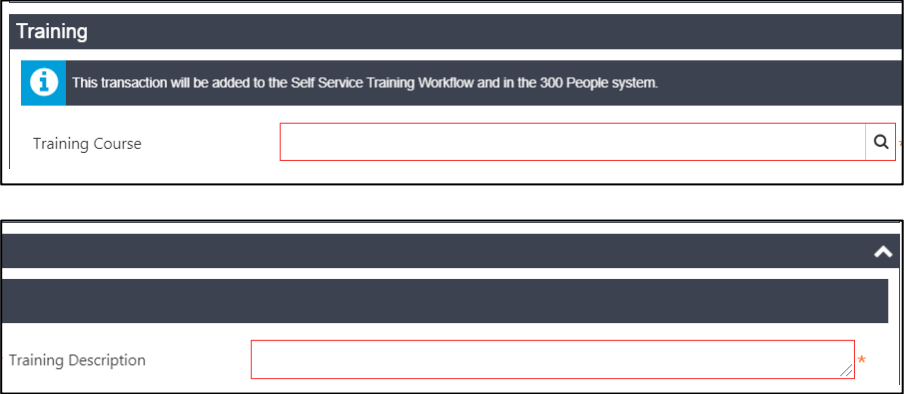
The following screen will display.



4. Complete the fields as guided below.

Field Name	Description
Position	The Position field will default to the current position linked to the employee.
Position Start Date	Defaults the date when the employee started in this position.
Area (Mandatory)	Select the Performance option (you will notice that there are options for Competencies and Skills, however these fields are not currently available).
What (Mandatory)	The Performance Indicators linked to the position will appear as a drop-down list. Select which Performance Area you would like to develop.
How (Mandatory)	Select from Training Mentoring, Self-study, or Other. This is the method by which you will develop this Performance Area. Note, if you select Mentoring, Self-Study or Other, you will only be asked to describe the development in more detail.

Development Description

	<p>However, if you choose the Training option, you are conveying a specific training need to the HR team for consideration. Here you will need to complete at least the Training Course and the Training Description.</p> 
Why	Motivate why you need development in this area, and why the method chosen above is appropriate.
Desired Outcome	Explain the outcome you would like to achieve.
By When	Specify the date of completion.
Cost	If applicable, specify the cost of the intervention.
Priority	This is an optional field that you can use to place a list of developmental items in order of priority.

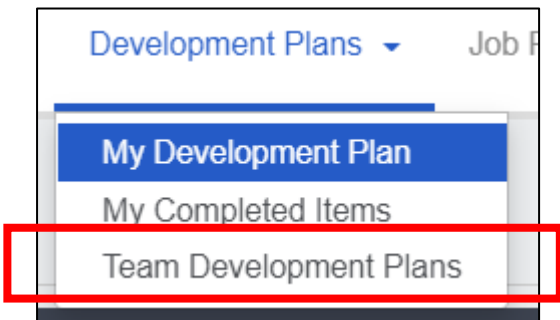
Section 2: My Completed Items

This section shows a historical record for completed development items.

Section 3: Team Development Plans

Managers can view, track, and update the statuses of the development plans and items for their teams.

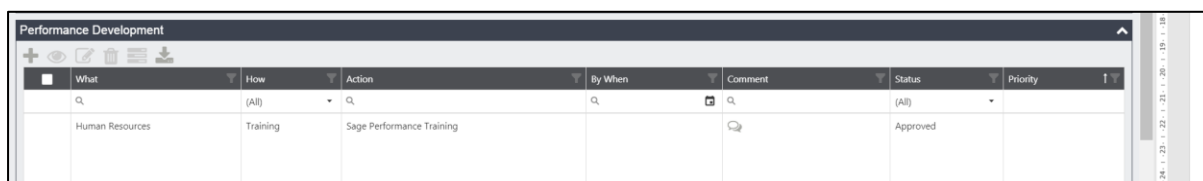
1. Expand Development plans, Click on *Team Development Plans*.



2. A list of your team’s development plans will appear here. Click on the Employee’s name to open their development plan.

Team Development Plans				
Employee				
Employee Code	Display Name	Job Title	Job Grade	Position
TEST39	Judge T PDP Test Employee	DIGL_C03 - Call Centre Manager		DIGL_TEST39 - PDP Test Employee

- Use the action buttons to update the status of the development item, leave a comment for the Employee's reference, or open the item for more detail.



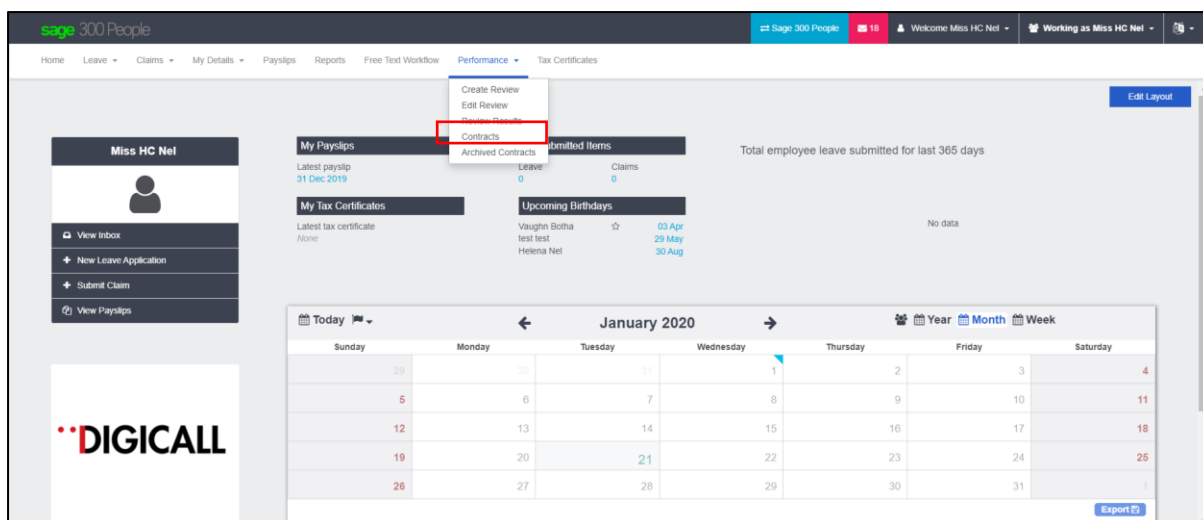
Note the meaning of each status for your Development Item:

Awaiting Approval	The item needs to be approved by the Manager.
In Progress	Will display if the item has been Approved. This indicates that the employee has started with the development item. This option will only display when Mentoring, Self-Study or the Other option was previously selected.
Completed	Indicates that the items have been completed by the Employee, once the status is changed to completed the item will be moved to the My Completed Items section.
Completed	Indicates that the items have been completed by the Employee. Once the item is marked as Completed, it will be moved to My Completed Items section.
Closed-Incomplete	Indicates that the item has not been completed but will not be done anymore and therefore needs to be removed from the Employee's development plan.

SECTION 5: REVIEW RESULTS

After completing their ratings, the Manager and Employee can now have their face-to-face performance discussion. To prepare for this session, the Manager can access the Review Results screen or pull Reports to view Employee scores.

- Click on the Performance tab; click on *Contracts*.



- Select the appropriate contract.

Home Leave Claims My Details Payslips Reports Free Text Workflow Performance Tax Certificates

Contracts

Employee Code	First Name	Last Name	Template Name	Contract Name	Contract Start Date	Contract End Date	Job Title	Job Grade	Employee Company Rule	Reports To
TEST00111	test	test	Digi Bi-Annual Performance Review	Digi Bi-Annual Performance Review	01 Apr 2019	30 Sep 2019	Receptionist		ESS_TEST_COMP - Standard Company Weekly	NOV055 - Miss HC
TEST00111	test	test	Digi Bi-Annual Performance Review	Digi Bi-Annual Performance Review	01 Apr 2019	30 Sep 2019	Receptionist		ESS_TEST_COMP - Standard Company Weekly	NOV055 - Miss HC
TEST00111	test	test	Digi Bi-Annual Performance Review	Digi Bi-Annual Performance Review	01 Apr 2019	30 Sep 2019	Receptionist		ESS_TEST_COMP - Standard Company Weekly	NOV055 - Miss HC
TEST00111	test	test	Digi Bi-Annual Performance Review	Carla Test (use this one)	01 Jan 2020	31 Jan 2020	Receptionist		ESS_TEST_COMP - Standard Company Weekly	NOV055 - Miss HC
NOV055	Helena	Nel	Digi Bi-Annual Performance Review	Digi Bi-Annual Performance Review	01 Apr 2019	30 Sep 2019	HR Consultant		012_NOVA - Nova Capital Solutions	NOV007 - Mr VB Br
NOV055	Helena	Nel	Digi Bi-Annual Performance Review	Digi Bi-Annual Performance Review	01 Apr 2019	30 Sep 2019	HR Consultant		012_NOVA - Nova Capital Solutions	NOV007 - Mr VB Br

3. Click on the *View Contract* icon 

Home Leave Claims My Details Payslips Reports Free Text Workflow Performance Tax Certificates

Contracts

View Contract

Employee Code	First Name	Last Name	Template Name	Contract Name	Contract Start Date	Contract End Date	Job Title	Job Grade	Employee Company Rule	Reports To
TEST00111	test	test	Digi Bi-Annual Performance Review	Digi Bi-Annual Performance Review	01 Apr 2019	30 Sep 2019	Receptionist		ESS_TEST_COMP - Standard Company Weekly	NOV055 - Miss HC
TEST00111	test	test	Digi Bi-Annual Performance Review	Digi Bi-Annual Performance Review	01 Apr 2019	30 Sep 2019	Receptionist		ESS_TEST_COMP - Standard Company Weekly	NOV055 - Miss HC
TEST00111	test	test	Digi Bi-Annual Performance Review	Digi Bi-Annual Performance Review	01 Apr 2019	30 Sep 2019	Receptionist		ESS_TEST_COMP - Standard Company Weekly	NOV055 - Miss HC
TEST00111	test	test	Digi Bi-Annual Performance Review	Carla Test (use this one)	01 Jan 2020	31 Jan 2020	Receptionist		ESS_TEST_COMP - Standard Company Weekly	NOV055 - Miss HC
NOV055	Helena	Nel	Digi Bi-Annual Performance Review	Digi Bi-Annual Performance Review	01 Apr 2019	30 Sep 2019	HR Consultant		012_NOVA - Nova Capital Solutions	NOV007 - Mr VB Br
NOV055	Helena	Nel	Digi Bi-Annual Performance Review	Digi Bi-Annual Performance Review	01 Apr 2019	30 Sep 2019	HR Consultant		012_NOVA - Nova Capital Solutions	NOV007 - Mr VB Br

4. The following screen will open. Click on the *Review Results* tab.

Performance Contract - 2034 - Dr t test

Setup Available Criteria Scheduled Reviews Probation Review Contract Criteria Documents & Policies **Review Results** Contract Results

Contract Name: Carla Test (use this one)

Contract Start Date: 01 Jan 2020 Contract End Date: 31 Jan 2020

Overall Rating Type: 4-Point Performance Rating Contract Process Definition: Standard

Contract Owner: 2088 - Miss HC Nel Contract Initiator: 2034 - Dr t test

Contract Owner Has View Access: Status: Approved

Allow Discussion Rating:

Reviewer Tentative Results:

Close [View Contract](#)

5. A list of the reviews for the Employee will show. Double-click on the appropriate review.

Review Name	Cycle Start Date	Cycle End Date	Status	Comments
Carla Test	01 Jan 2020	31 Jan 2020	Incomplete	
January Review	01 Jan 2020	31 Jan 2020	Captured	

Tip: If both the Employee and Manager have rated, the Status for the review should be Captured. Read more about the meaning of each Status in the Table below.

Option	Description
Incomplete	This means that either the Manager or Employee review is still outstanding. Review results will not be available for viewing yet.
In Progress	One, or both reviewers have started completing their reviews. The review status will remain on In Progress until both reviewers have Submitted their reviews.
Captured	This means that both the Employee and Manager have captured their reviews. You will be able to view these review results.
Awaiting acknowledgement	The system allows Managers to release the performance results (including both the Manager and Employee ratings and comments) to the Employee. After released, Employees will have to Accept and Agree, or Accept and Dispute their results.
Acknowledged	The Employee has Acknowledged their review, and agrees with the results thereof.
Disputed	The Employee has Acknowledged their review yet disputed the results. In this case, HR will follow up.

6. The following screen will display. Click *View*, next to the Performance section.

Contract Review: Adhoc review for myself on ESS For Employee: 6 - Mr L Draai

Review Area	Weight	Total Actual Rating	Total Rating	Calibrated Rating	Norm	Percentage Of Norm	Percentage Of Total Score
Performance	40	3.105	Good		7	44.36	62.1
Values	30	2	On Standard		2	100	66.67
Goals Review Result	30	9			7	128.57	60
Review Totals		3.142	Good		5	62.84	62.84

Performance Results

Values Results

Goals Review Result Results

Review Results

Overall Comments

Review Result

Total Actual Rating: 3.142 | Total Rating: Good | Norm Rating Specified: Excellent

Total Norm Rating: 5 | Percentage Of Norm: 62.84 | Percentage Of Total Score: 62.84

Exclude Incomplete Reviewers' Ratings | Refresh Results | Recalc Results | Save | Close

7. From here, Managers will be able to see comments and ratings from different reviewers. Click on the speech bubbles to see each rater's comments.

Contract Review: Adhoc review for myself on ESS For Employee: 6 - Mr L Draai

Values Results

Company Value Area	Weight	Company Value	Weight	Norm	Mr N Jackson (80%)	Ms S Mpele (20%)	Mr L Draai (0%)	Reviewers' Row Total	Discussion
Sage Values		Customers first	20	2	Rating: 2	Rating: 2	Rating: 2	Rating: 2	
		Do the right thing	20	2	Rating: 3	Rating: 2	Rating: 2	Rating: 2.8	
		Innovate	20	2	Rating: 1	Rating: 2	Rating: 2	Rating: 1.2	
		Make a difference	20	2	Rating: 2	Rating: 2	Rating: 3		

Values Review Result

Total Actual Rating: 2 | Total Rating: On Standard | Norm Rating Specified: On Standard

Total Norm Rating: 2 | Percentage Of Norm: 100 | Percentage Of Total Score: 66.67

Values Review Result Calibration

Total Calibrated: | Total Calibrated Rating: | Calibration Approved By: |

Percentage Of Norm: 0 | Percentage Of Total Score: 0

Exclude Incomplete Reviewers' Ratings | Refresh Results | Recalc Results | Save | Close

Review Comment - Reviewers Overall Comments

Mr Miles Jackson

Overall you are not too bad! :-)

Ms Sally Mpele

It is not too bad.

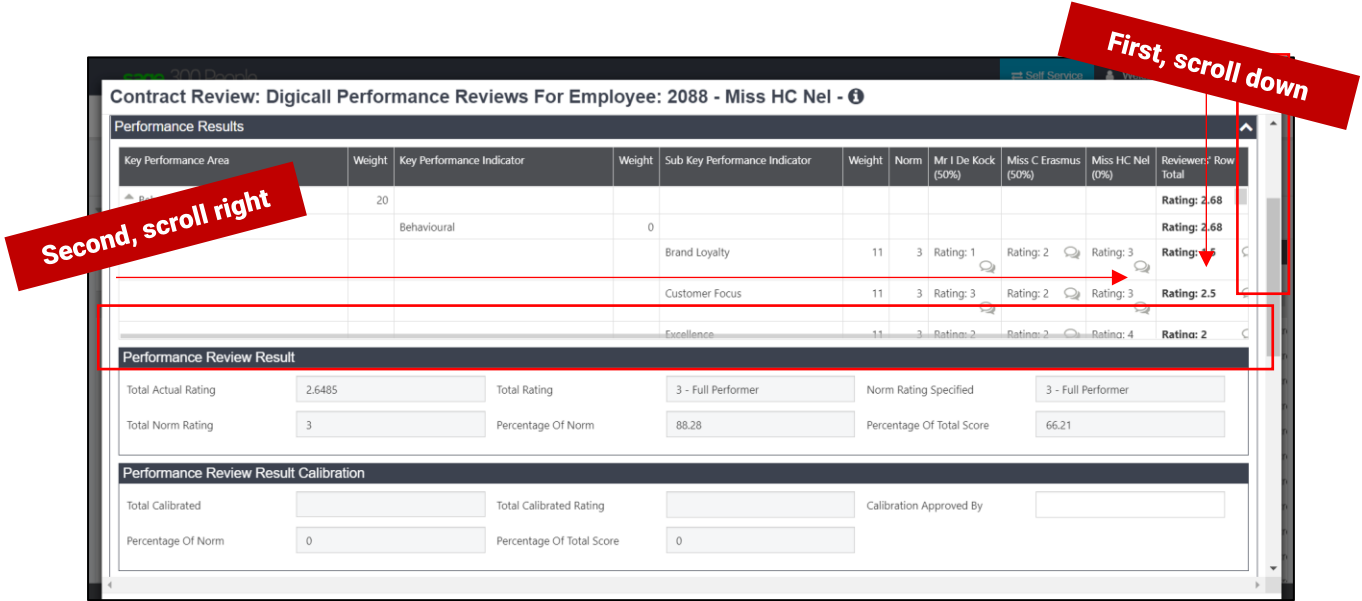
Mr Draai

I think I am pretty awesome.

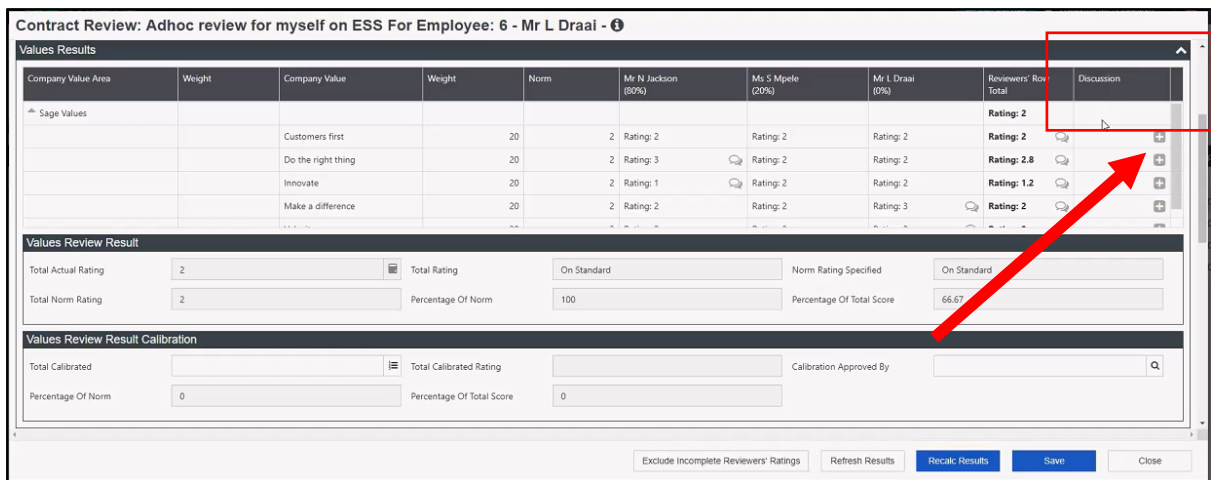
Close

It may be the case that the Manager and Employee agree on a different score (other than what the Manager has already captured). A Discussion rating is a third rating that can be used to capture the agreed-upon scores that resulted from the performance discussion. The Discussion rating will override your original score, but keep a record of the original scores given by each eater.

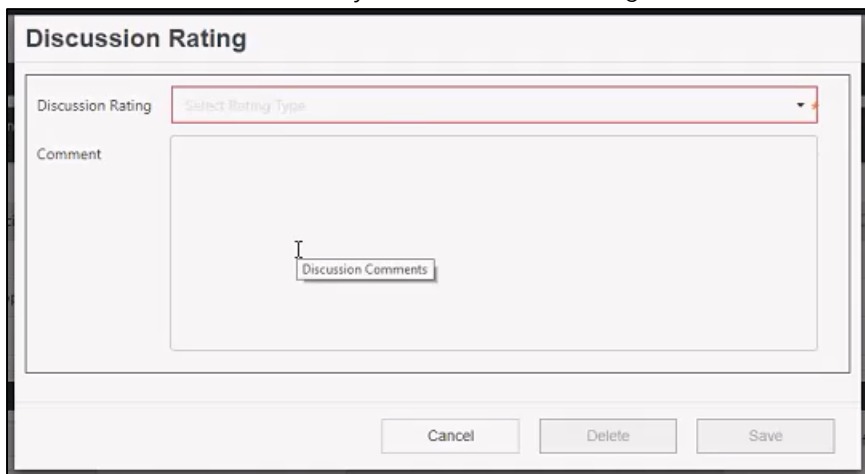
8. To capture a Discussion rating, navigate to the right of the screen until you see the Discussion column.



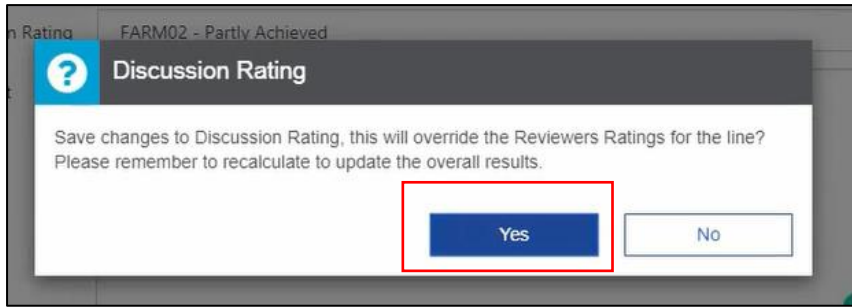
9. Next, click on the plus icon in the Discussion column to override your original rating and provide comments for the change.



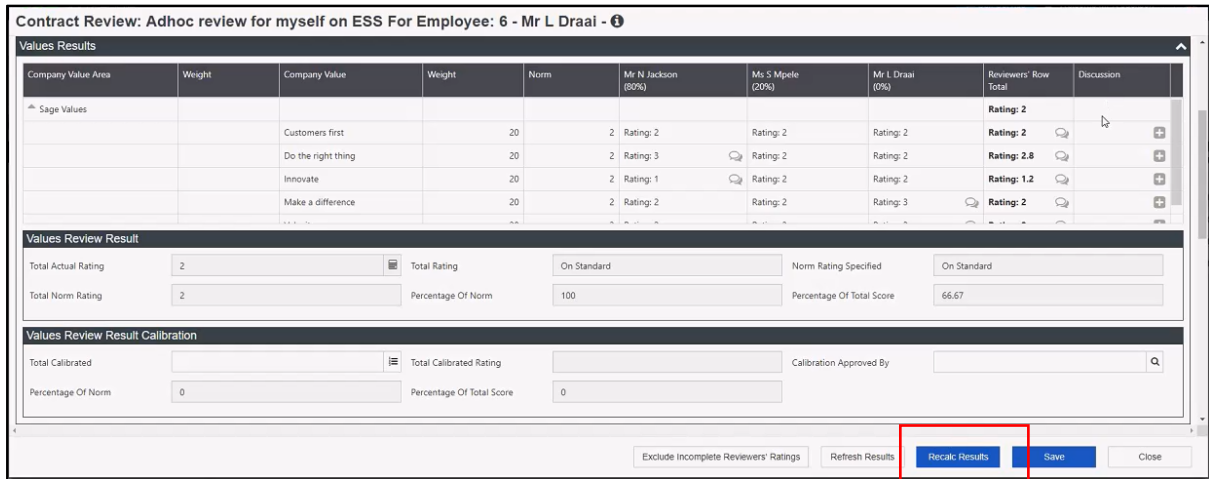
The following popup will appear. Click on the drop-down and select the *Discussion* rating. Enter a Comment to motivate why the score was changed. Click on Save.



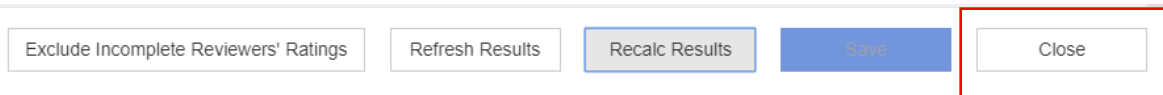
The following warning will appear, click Yes to confirm.



10. To affect these changes, click on *Recalc Results* on the bottom part of the screen.



11. After you have recalculated the results, you can *Close* the screen.

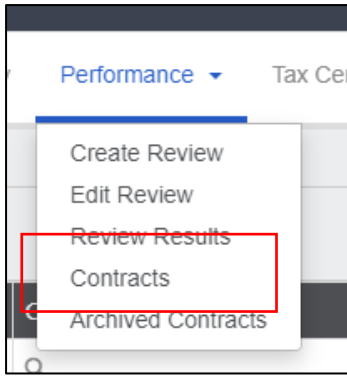


12. The next step is Calibration. Please do not move on to the next step (releasing of results) before confirmation is received from HR.

What is Calibration? Calibration takes places when managers present their team ratings to a more senior manager - ratings can then be amended if needed, to ensure that ratings are consistent, fair, and as objective as possible.

13. After confirmation has been received from HR that you may move on to the next step in the process, you may release the review results to the Employees. This will send the final results to the Employee's inbox. Note: These results will remain in the employee's inbox and will *not* be removed.

Navigation path: Performance tab > Contracts > Double Click on the appropriate Contract > Click on the Review Results Tab at the top of the screen.



Contracts

Employee Code	First Name	Last Name	Template Name	Contract Name	Contract Start Date	Contract End Date	Job Title	Job Grade	Employee Company Rule	Reports To
TEST00111	test	test	Digi Bi-Annual Performance Review	Digi Bi-Annual Performance Review	01 Apr 2019	30 Sep 2019	Receptionist		ESS_TEST_COMP - Standard Company Weekly	NOV055 - Miss HC
TEST00111	test	test	Digi Bi-Annual Performance Review	Digi Bi-Annual Performance Review	01 Apr 2019	30 Sep 2019	Receptionist		ESS_TEST_COMP - Standard Company Weekly	NOV055 - Miss HC
TEST00111	test	test	Digi Bi-Annual Performance Review	Digi Bi-Annual Performance Review	01 Apr 2019	30 Sep 2019	Receptionist		ESS_TEST_COMP - Standard Company Weekly	NOV055 - Miss HC
TEST00111	test	test	Digi Bi-Annual Performance Review	Carla Test (use this one)	01 Jan 2020	31 Jan 2020	Receptionist		ESS_TEST_COMP - Standard Company Weekly	NOV055 - Miss HC
NOV055	Helena	Nel	Digi Bi-Annual Performance Review	Digi Bi-Annual Performance Review	01 Apr 2019	30 Sep 2019	HR Consultant		012_NOVA - Nova Capital Solutions	NOV007 - Mr V B
NOV055	Helena	Nel	Digi Bi-Annual Performance Review	Digi Bi-Annual Performance Review	01 Apr 2019	30 Sep 2019	HR Consultant		012_NOVA - Nova Capital Solutions	NOV007 - Mr V B

Performance Contract - 2034 - Dr t test - i

Setup | Scheduled Reviews | Probation Review | Contract Criteria | Documents & Policies | **Review Results** | Contract Results

Contract Name: Carla Test (use this one)

Contract Start Date: 01 Jan 2020 | Contract End Date: 31 Jan 2020

Overall Rating Type: 4-Point Performance Rating | Contract Process Definition: Standard

Contract Owner: 2088 - Miss HC Nel | Contract Initiator: 2034 - Dr t test

Contract Owner Has View Access: | Status: Approved

Allow Discussion Rating: | Reviewer Tentative Results:

Close | Save & Close

14. Results can be released by clicking on the play button indicated in red below.

Performance Contract - 2088 - Miss HCN Nel - i

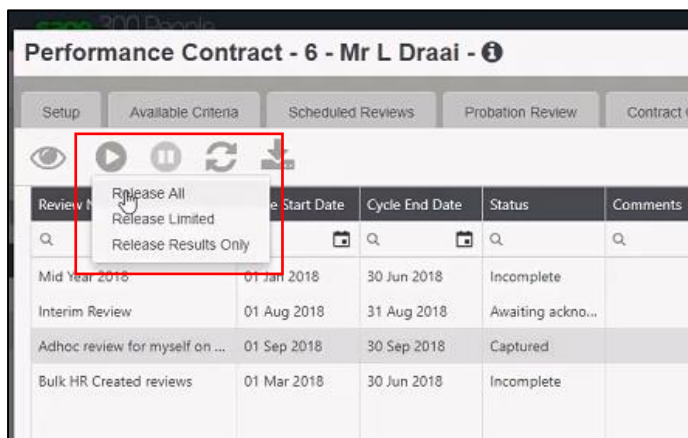
Setup | Available Criteria | Scheduled Reviews | Probation Review | Contract Criteria | Documents & Policies | **Review Results** | Contract Results

Review / Name	Cycle Start Date	Cycle End Date	Status	Comments
Nova Bi-Annual September ...	01 Apr 2019	30 Sep 2019	Incomplete	
Helena Test	01 Apr 2019	30 Sep 2019	Incomplete	

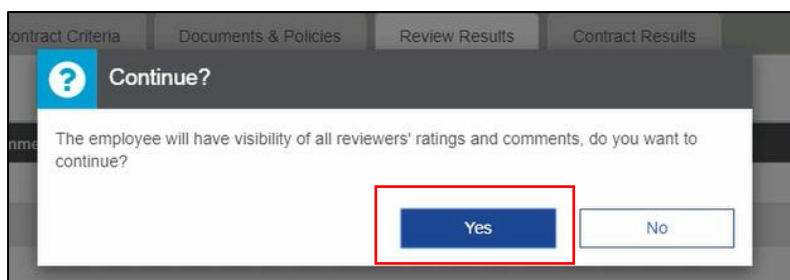
Close | Save & Close

Three options are available:

Option	Description
Release All <i>*preferred option</i>	This option will release all comments and ratings. You can use this if you only had the Manager and Employee as the standard two raters. If you loaded Additional Reviewers and select this option, their ratings and comments will also be released.
Release Limited	Will only release the main reports to reviewer and Employee's own comments and ratings. If you have Additional Reviewers and select this option, only the Employee and Manager (main reports to) ratings and comments will be released.
Release Results Only	Will only release the final ratings, not the comments.



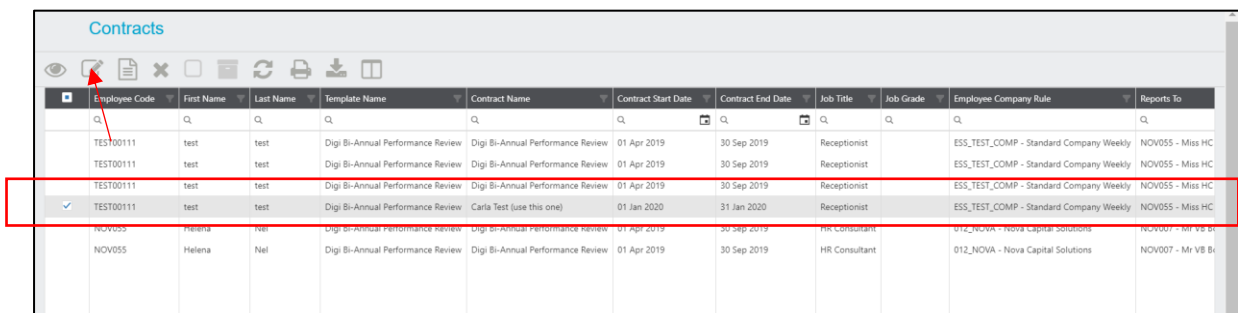
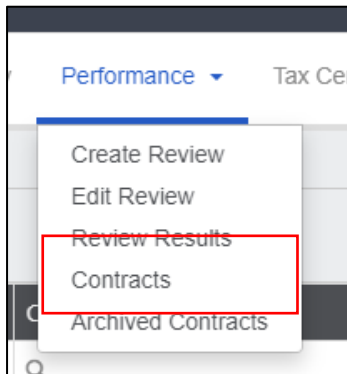
15. The following notification will appear. Click on Yes to confirm the releasing of results to the Employee.



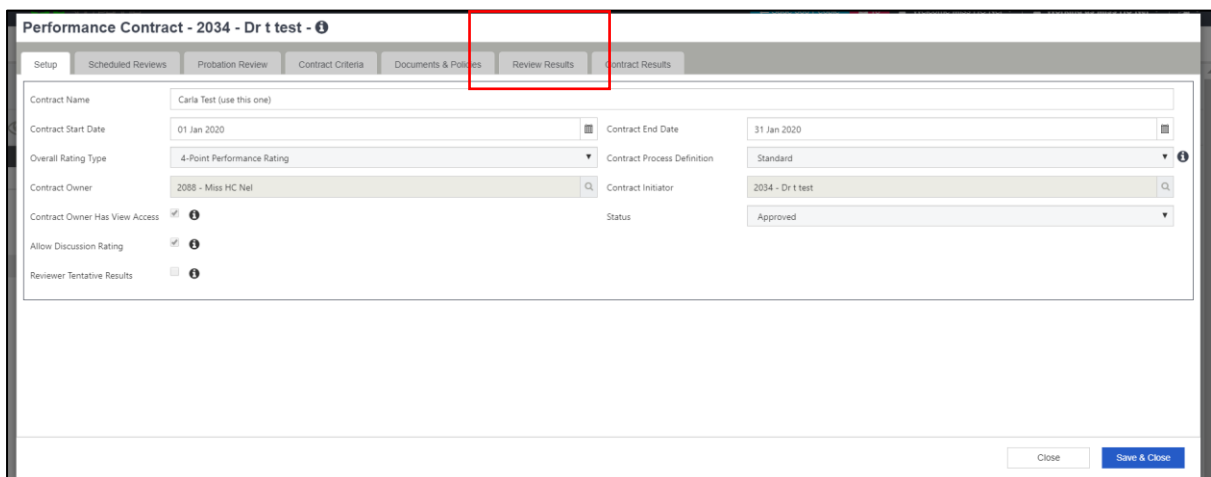
Go to SECTION 5: REPORTS, to learn more about generating reports.

SECTION 6: REPORTS

All reports can be exported from the Review Results screen. First, navigate to the screen. **Navigation path:** Performance > Contracts > Double click on the appropriate contract > Select the Review Results Tab > Double click on the review > Click on the View or Edit button.



Employee Code	First Name	Last Name	Template Name	Contract Name	Contract Start Date	Contract End Date	Job Title	Job Grade	Employee Company Rule	Reports To
TEST00111	test	test	Digi Bi-Annual Performance Review	Digi Bi-Annual Performance Review	01 Apr 2019	30 Sep 2019	Receptionist		ESS_TEST_COMP - Standard Company Weekly	NOV055 - Miss HC
TEST00111	test	test	Digi Bi-Annual Performance Review	Digi Bi-Annual Performance Review	01 Apr 2019	30 Sep 2019	Receptionist		ESS_TEST_COMP - Standard Company Weekly	NOV055 - Miss HC
TEST00111	test	test	Digi Bi-Annual Performance Review	Digi Bi-Annual Performance Review	01 Apr 2019	30 Sep 2019	Receptionist		ESS_TEST_COMP - Standard Company Weekly	NOV055 - Miss HC
TEST00111	test	test	Digi Bi-Annual Performance Review	Carla Test (use this one)	01 Jan 2020	31 Jan 2020	Receptionist		ESS_TEST_COMP - Standard Company Weekly	NOV055 - Miss HC
NOV055	Helena	Nel	Digi Bi-Annual Performance Review	Digi Bi-Annual Performance Review	01 Apr 2019	30 Sep 2019	HR Consultant		012_NOVA - Nova Capital Solutions	NOV007 - Mr VB Br
NOV055	Helena	Nel	Digi Bi-Annual Performance Review	Digi Bi-Annual Performance Review	01 Apr 2019	30 Sep 2019	HR Consultant		012_NOVA - Nova Capital Solutions	NOV007 - Mr VB Br



Performance Contract - 2034 - Dr t test - 1

Setup | Scheduled Reviews | Probation Review | Contract Criteria | Documents & Policies | **Review Results** | Contract Results

Contract Name: Carla Test (use this one)

Contract Start Date: 01 Jan 2020 | Contract End Date: 31 Jan 2020

Overall Rating Type: 4-Point Performance Rating | Contract Process Definition: Standard


Contract Owner: 2088 - Miss HC Nel | Contract Initiator: 2034 - Dr t test

Contract Owner Has View Access: | Status: Approved

Allow Discussion Rating: | Reviewer Tentative Results:

Close | Save & Close

From the Review Results screen (tab), you can access three report options.

Option 1: Click on the *Export Selected Result* button  to download an Excel report. Select where you would like to download the file.

Performance Contract - 2034 - Dr t test - i

Setup | Scheduled Reviews | Probation Review | Contract Criteria | Documents & Policies | Review Results | Contract Results

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Review Name	Cycle Start Date	Cycle End Date	Status	Comments
Q	Q	Q	Q	Q
Carla Test	01 Jan 2020	31 Jan 2020	Incomplete	
January Review	01 Jan 2020	31 Jan 2020	Captured	

On the Excel document, select the second tab (Performance).

2088 - Miss HC Nel - Review Result (1) - Excel

File | Home | Insert | Page Layout | Formulas | Data | Review | View | Tell me what you want to do... | Helena Nel | Share

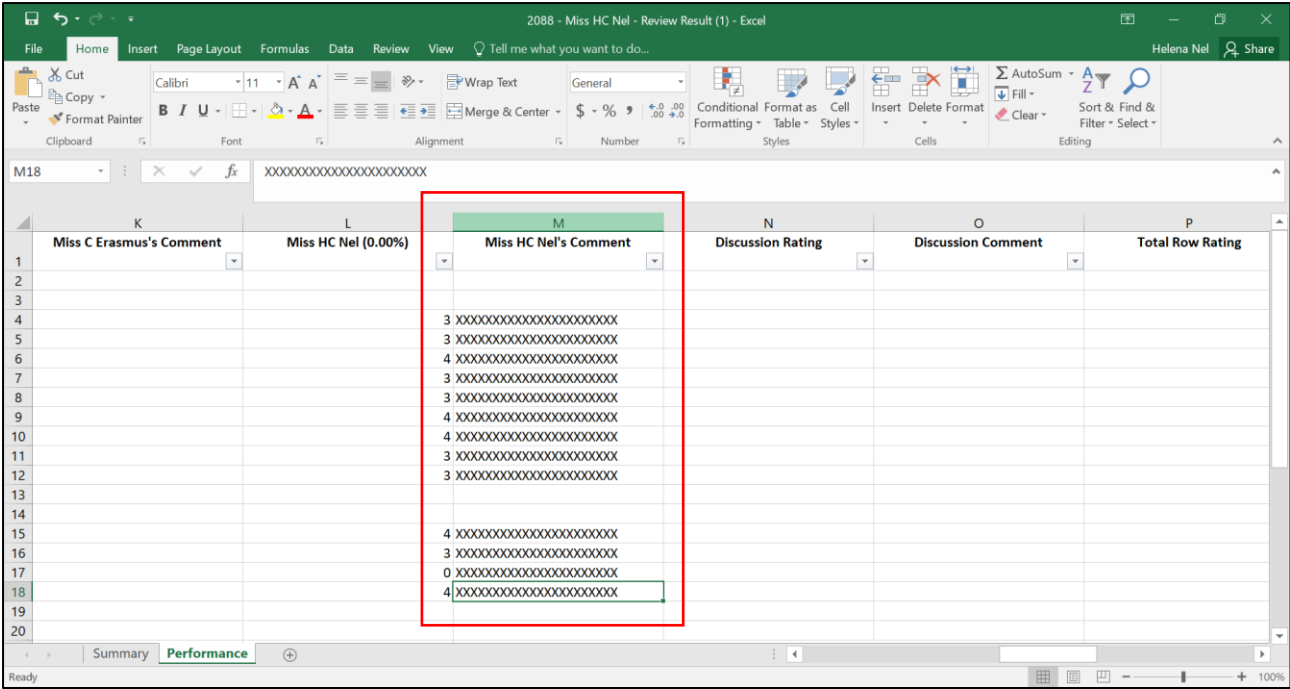
Clipboard | Font | Alignment | Number | Styles | Cells | Editing


A1 | Key Performance Area

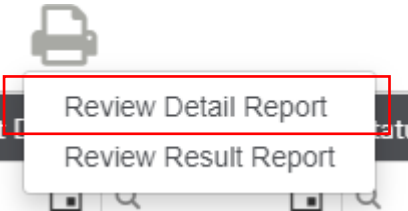
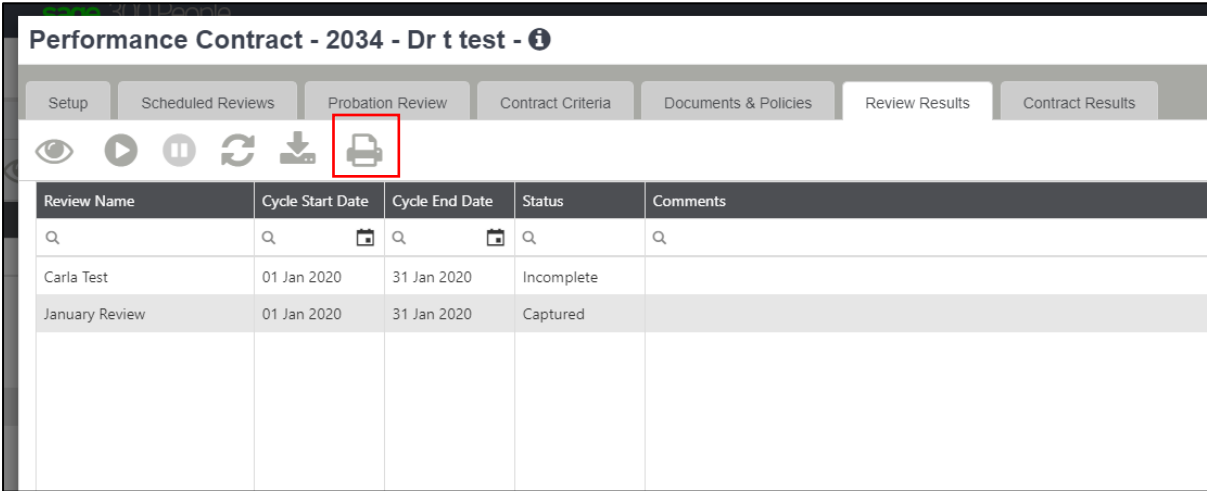
Key Performance Area	Key Performance Area Weight	Key Performance Indicator	Key Performance Indicator Weight	Sub Key Performance Indicator	Sub Key Performance Indicator Weight
Behavioral Assessment	20	Behavioural	0	Brand Loyalty	
				Customer Focus	
				Excellence	
				Job Knowledge	
				Passion	
				Problem Solving	
				Quality of Work	
				Team Building	
				Follow Through	
Perspective: Financial	25	Financial Management	0	Achieved monthly billable targets	
				Adhere to project budgets	
				Provide accurate info for proposal	
				Provide Lead/ Snr Consultant with	
Perspective: Internal Procedures (25	Business process management: Gr	0		

Summan | Performance

Scroll to the right to see the Employee scores and comments.



Option 2: From the Review Results screen, click on the *Print Selected Review* button  to export a PDF report. Select the Review Detail Report.



The Review Detail Report will generate, download it by clicking on the cloud button on the top right-hand side of the screen.

PerformanceReviewDetail
Performance Review Detail Report

Employee Details

Employee	TEST00111 - Dr t test	Review Cycle Start	2020/01/01
Review Name	Carla Test	Review Cycle End	2020/01/31
Review Category	Test	Review Completed by Date	2020/01/31
Review Type	Bi-Annual	Review Weight	100

Performance Items

Rating Scale

0.00	N/A - Not Applicable
1.00	1 - Non Performer
2.00	2 - Developing Perform
3.00	3 - Full Performer
4.00	4 - Exceptional Performer

Rating Scale: 4-Point Performance Rating

Key Performance Area	Key Performance Indicator	Sub Key Performance Indicator	Norm	Weight	Strategic Objective	Behavioural Indicator	Measurement	Evidence	Target	Objective
Perspective: Internal Procedures (Governance)			0.00	10.00	Adherence/Compliance					
	Company Policies		0.00	0.00						
		Digital Policy and Procedure	3.00	100.00						Comply with and abide by all Policies and Procedures set out by the company and ensure that employees reporting to you do same
Perspective: Internal Procedures (Operational)			0.00	70.00	Systems/Process Optimisation					

PerformanceReviewDetail
Performance Review Detail Report


Employee Details

Employee	TEST00111 - Dr t test	Review Cycle Start	2020/01/01
Review Name	Carla Test	Review Cycle End	2020/01/31
Review Category	Test	Review Completed by Date	2020/01/31
Review Type	Bi-Annual	Review Weight	100

Performance Items

Rating Scale

0.00	N/A - Not Applicable
1.00	1 - Non Performer
2.00	2 - Developing Perform
3.00	3 - Full Performer

Option 3: Option 2: From the Review Results screen, click on the *Print Selected Review* button  to export a PDF report. Select the Review Result Report.

Performance Contract - 2034 - Dr t test - i

Setup | Scheduled Reviews | **Probation Review** | Contract Criteria | Documents & Policies | Review Results | Contract Results

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Review Name	Cycle Start Date	Cycle End Date	Status	Comments
Carla Test	01 Jan 2020	31 Jan 2020	Incomplete	
January Review	01 Jan 2020	31 Jan 2020	Captured	

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Review Detail Report

Review Result Report

Save 300 People | 18 | Welcome Miss L

Review Result Report

Review Results

Review Details

Employee	TEST00111 - Dr t test	Job Title	Receptionist
Review Name	January Review		
Review Cycle Start	2020-01-01	Review Cycle End	2020-01-31
Review Category	Performance Review	Review Type	Discretionary

Reviewer Details

Reviewer 1	NOV055 - Miss HC Nel
Reviewer 2	PR0105 - Mr A Dangarembizi
Reviewer 3	TEST00111 - Dr t test

Review Criteria Results

Review Area	Weight	Total Actual Rating	Total Rating	Calibrated Rating	Norm	Percentage Of Norm	Percentage Of Total Score
Performance	100.00	2.9460	3 - Full Performer	0.0000	3.00	98.20	73.65
Review Totals		2.9460	3 - Full Performer	0.0000	3.00	98.20	73.65

Performance

Area	Indicator	Sub-Indicator	Weight	Norm	Row Total
Perspective: Internal Procedures (Governance)			10.00		3.00
	Company Policies		0.00		3.00
		Digicall Policy and Procedure	100.00	3.00	3.00
Perspective: Internal Procedures (Operational)	Operational		70.00		2.78
			0.00		2.78
		Prompt Call Answering	14.00	3.00	3.00
		Asking relevant questions	14.00	3.00	4.00
		Book the Boardroom and kept it neat	22.00	3.00	4.00
		Direct service providers to appropriate designated	14.00	3.00	4.00
		Use a professional, pleasant greeting	22.00	3.00	1.00
		Attentive listening to take	14.00	3.00	1.00

Review Result Report

Review Results

Review Details

Employee	TEST00111 - Dr t test	Job Title	Receptionist
Review Name	January Review		
Review Cycle Start	2020-01-01	Review Cycle End	2020-01-31
Review Category	Performance Review	Review Type	Discretionary

Reviewer Details

Reviewer 1	NOV055 - Miss HC Nel
Reviewer 2	PR0105 - Mr A Dangarembizi
Reviewer 3	TEST00111 - Dr t test

Review Criteria Results

Review Area	Weight	Total Actual Rating	Total Rating	Calibrated Rating	Norm	Percentage Of Norm	Percentage Of Total Score
Performance	100.00	2.9460	3 - Full Performer	0.0000	3.00	98.20	73.65
Review Totals		2.9460	3 - Full Performer	0.0000	3.00	98.20	73.65

Performance

Area	Indicator	Sub-Indicator	Weight	Norm	Row Total
Perspective: Internal Procedures (Governance)			10.00		3.00
		Company Policies	0.00		3.00
		Digicall Policy and Procedure	100.00	3.00	3.00
Perspective: Internal Procedures (Operational)			70.00		2.78

Thank you for completing the Digicall Performance Management process!