2021

TalentPeak[™] CorpAdmin Comprehensive Reference Guide

Talent Peak

Insights For Performance LLC and TalentPeak[™]

1/1/2021



PDF Guide Last Updated: 2019

The Online Searchable Knowledge Base is undergoing migration to new platform & will be relaunched 1st quarter of 2021 – it will be visible to you here by clicking on the "Knowledge Base" Button. *(Currently links to TP website hidden pages)*



The information in the **Primary CORPADMIN COMPREHENSIVE REFERENCE GUIDE** covers the TalentPeak[™] core performance management system and **all** additional modules and systems.

To get the hyperlinks in this User Guide to work, you will need **Adobe Reader** Download it for free from: <u>www.adobe.com</u>

For easier navigation, please use the Table of Contents with hyperlinks to navigate to specific topics when questions arrive. The Adobe View pane if enabled will keep the thumbnails open for easier viewing & navigation; and the built in Adobe "search" function, to obtain answers to your questions using key words search, or to quickly get to the desired referenced section.

(In Adobe, at the top left, Click on VIEW>>SHOW/ HIDE >>NAVIGATION PANE>>THUMBNAILS)

Fact Note: TalentPeak™ is written in International English Spelling to enable a globally acceptable format

TalentPeak™ Our Go Green Initiative

We are continuously improving! Because of this commitment to our users, we undergo frequent system and feature updates. The benefit is a more efficient TalentPeak™ and richer experience for you. Our User Guides are in downloadable PDF format and are updated frequently with every new release. Please save this as a PDF and carefully consider before deciding to print. Thank you!







TalentPeak[™] No Cost Support Options

Contact Support - https://www.talent-peak.com/support/ (All Users)

TP Support Webpages

TalentPeak™ Primary CorpAdmin Role - https://www.talent-peak.com/hr-corp-admin/

TalentPeak™ Division Admin/Manager – Appraisor Role - <u>https://www.talent-peak.com/appraisor/</u>

TalentPeak™ Appraisee Role – <u>https://www.talent-peak.com/appraisee/</u>

Phone Support – Client assigned TalentPeak consultant for phone – 1-866-900-5172 (IFP#)

Email & Webinar Support (Primary Corp Admin & Designated System Admin only)

All Other Users Chat, Ticket & Email Support – <u>talentpeaksupport@talent-peak.com</u> or from support webpages above that are linked to chat & email

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TALENTPEAK SYSTEM OVERVIEW

System Diagram

Below are three different system privilege levels and their respective roles.

- 1. System Administrator (CorpAdmin)
- 2. Appraisor
- 3. Appraisee

•SYSTEM ADMINISTRATOR

Sets System Parameters & Populates all Required Databases (Org Chart, Job Titles, Locations, Ad-Hoc Categories, Competencies, Rating Keys, Users)

> Creates Appraisal Templates for Job Titles/Positions (Optionally also Job Descriptions)

Downloads Appraisal Templates for selected or All organization units/employees into individualized Performance Agreements (1-Click Creation - auto-assigning per line manager)

APPRAISOR

Downloads Appraisal Templates for Direct Reports into Indivdualized Performance Agreements

DURING PERFORMANCE PERIOD

Adds Performance Data/Incidents/Journal entries into Appraisee's Performance Record Notes

APPRAISAL TIME

1. Prepares for Appraisal

2. Conducts Appraisal (1 on 1)

3. Finalizes Appraisal

4. Signs Off Appraisal (electronically)

•APPRAISEE

Views Performance Agreement 24/7/365 & their specific accountabilities, Measures & Standards, Goals & Objectives

DURING PERFORMANCE PERIOD Logs in to add data/incidents/Journal entries into their individual Performance Record Notes

APPRAISAL TIME

1. Does Self Appraisal

2. Attends Appraisal Interview

3. Reviews Appraisal Results

4. Signs Off on Appraisal (electronically)



System Roles

Log In to TalentPeak[™] with the information provided you from your advisor, or assigned consultant. You will need your ORG CODE, USER NAME & PASSWORD provided to you in an email with the site set up instructions.

To begin, Click on the CorpAdmin role link (it will be highlighted in yellow).

rpAdmin Home					Welcome Ben Smith	Access privileges: CorpAdmin DivAdmin Ap	praisor A
ome System Adn	nin Users Appraisals	Reports	Tutorials			♠	S
orporate Admin	istration						
Current System Settir	ngs				Corporate-Wide Ratir	ng Distribution	
System Settings				100%	(c		
Corporate Administrator	Ben Smith						
Performance Cycle 1	Annually		<u>s</u>				
Perf Year Start Month	January		-se	15%			
License Period	10 Apr 2006- 31 Dec 2015		DI2				
User Licenses	50/ 100		Ap	50%			
lick here to modify your	system settings		fall				
Performance Periods	Cycle 1: Annually		0 %	25%	lee	100-	
Begins	Ends			0%		1111000	
Jan 2013	31 Dec 2013				0% 520% 530% 540% 550% 560% 570% 580% 59	76 ±100% ±110% ±120% ±130% ±140% ±150% ±160% ±170%	
Jan 2012	31 Dec 2012				Appraicale falling within 10	Performance Sub Panges	
Jan 2011	31 Dec 2011				Address and a stand within 10	Ferrormance Sub-Kanges	
Jan 2010	31 Dec 2010						
Jan 2009	31 Dec 2009						
lick here to add a new D	erformance Period			Tota	Number of Employees: 50	Appraisals Created: 25	

The system accommodates FIVE different roles:

- CorpAdmin
 Appraisor
 - UserAdmin Appraisee
- DivAdmin

These roles are activated in each person's User File: See "System Access Privileges" in this Section

NOTE: Employees (at all levels) are called USERS in the system.

Each of the five roles can be accessed instantly by clicking on the **role links** in the top right-hand corner of your screen. The active one is highlighted in yellow (see **DivAdmin** below).

DivAdm	in Home			Welcome Ben Smith Access privileges: CorpAdmin DivAdmin Appraisor Appr					
Home	System Admin	Users	Appraisals	Reports	Tutorials			S	Sign Out
Divisio	nal Administrati	on							
Current System Settings Rating Distribution: Assigned Division/s									
System	Settings			(11 Appraisais)					_
Corpora	te Administrator Ben	<u>Smith</u>		10078					

Let's look at these roles briefly:

TalentPeak[™] Roles Defined

	Sets up and manages the system for the organisation. Adds and edits the User Files of employees (users). Monitors the status of appraisals of all employees in the entire organisation (and "chases them down" if necessary). Can view all appraisal forms of everybody for training, coaching and quality moderation purposes. Can also run a variety of reports based on the performance of organisation-wide units and employees.
Corporate Administrator (CorpAdmin)	There can only be one "primary" CorpAdmin for the organisation, but additional "secondary" CorpAdmins can also be assigned, e.g. you may also want to give your President/CEO (others?) secondary CorpAdmin status so that they can also view the appraisals of all employees in the organisation.
	Secondary CorpAdmins have all primary CorpAdmin access rights, except that they are not able to access the System Settings or Performance Periods pages (these, being very sensitive system pages, are strictly reserved for access by the primary CorpAdmin only).
	The primary CorpAdmin is selected in System Settings, and can be changed to a different person at any time (only the current primary CorpAdmin can select a new one).
	Views and monitors the status of appraisals of everybody in their assigned Divisions (or departments/regions/locations) and "chases them down" if necessary. Adds and edits the User Files of employees in these units. Can view all appraisal forms of everybody in their assigned units for training, coaching and quality moderation purposes. Can also run a variety of reports based on the performance of division-wide units and employees.
	DivAdmins assist the CorpAdmin in the above tasks, thereby ensuring that everything does not fall on the shoulders of the CorpAdmin.
Divisional Administrator (DivAdmin)	NOTE: The assigning of DivAdmins is not compulsory, but useful for larger and geographically widespread organisations, e.g. with offices in different countries, continents or time zones (where a local DivAdmin has more convenient access to employees during normal working hours).
	Any number of DivAdmins can be "assigned" in the system.
	NOTE: You can also assign the DivAdmin role to Divisional Directors, so they can see all the appraisals (and run reports) of their divisions.
User Admin (UserAdmin)	A User Administrator or System Administrator Assistant can be enabled to be provided with access to the system pages for maintaining User Files, or to assist with Appraisal Templates and Job Description setup/admin tasks.
Appraisor	Appraisors are line and project managers who are required to conduct Performance Appraisals/Reviews with Appraisees (normally direct reports/"subordinates"). Appraisors complete the appraisals of their direct reports, using the system, and monitor the status of their appraisals.
Appraisee	Everybody in the organisation is an Appraisee (by default). In this role, Appraisees can access their own Appraisal Forms.

Reference the System Admin User Setting in this Section of this Guide, Designating the Corp Admin & User Admin Settings.

TALENTPEAK™ PERFORMANCE REVIEW PROCESS OVERVIEW

TalentPeak[™] has **four key** forms used in the review process that you may not be familiar with and they are:

- 1. The employee agreement or Agreement form
- 2. The Appraisal Preparation Form or Prep form for short
- 3. The Official Appraisal Form
- 4. The Summary Performance Optimization Plan or Summary POP

TalentPeak™ Review Process and Role Each Form Plays

Step 1 The manager finalizes the employee's Agreement – Defined Below (What is expected and how he or she will be evaluated)

Step 2 The manager and employee each complete a separate draft appraisal in preparation for their face to face review meeting – Prep Forms – defined below

Step 3 Following the Face to Face review meeting the appraisor makes any necessary edits to the manager's Prep Form and with a single click transfers the contents of the updated appraisor prep form to the Official Appraisal Form

Step 4 Appraisor reviews and makes final edits to the Official Appraisal Form and with a single click transforms the entire contents of the Official Appraisal Form to the Summary and Performance Optimization Plan Sign Off Form



1. Agreement Definition

Definition:

The Agreement is the foundational document to the appraisal form. The Agreement document describes what is expected of the employee and how their performance will be measured.

Edits To The Agreement:

Changes to the agreement are automatically updated to the employee's appraisal forms (*Appraisal Prep Form and the Official Appraisal Form*). Edits to the Agreement form are permission based and controlled by the CorpAdmin. The editing permissions and restrictions range from being totally locked to partially locked or totally open for creation and editing by the appraisor. Managers and Division Administrators may be given editing permission for their employee's Agreements by the CorpAdmin.

Other Settings within the Agreement:

The Agreement is a foundational document because it is a platform for the following appraisal management actions:

- Change the review date from the one assigned by the system based on the default performance cycle settings
- Invite multi-raters to provide feedback on an employee's performance
- View the employee's previous review
- Add any special notes pertaining to this review
- Add or edit performance competencies, goals, objectives etc. if permission has been granted by the CorpAdmin.
- Release the agreement to the employee for editing their goals and objectives
- · Remove employee's ability to edit the agreement
- Edit performance measure weightings if weightings have been turned on in system settings by the CorpAdmin
- Rearrange the order of performance measures as they appear in the appraisal form if not locked by the CorpAdmin
- Assign a different rating scale from the rating scale library if not locked by the CorpAdmin
- Customize the rating scale for a specific performance measure if not locked by the CorpAdmin

2. Appraisal Prep Form

Definition:

The Prep form or preparation form is the document used in preparation for the **employee/manager face to face meeting**. The Prep Form is typically used as a dynamic document for updating and recording performance throughout the year and not just at review time. So it stands to reason that there are two types of Prep Forms:

- 1. An appraisee prep form or appraisee self-assessment throughout the year, and
- 2. An appraisor's prep form the manager's assessment of the employee's performance throughout the year

Appraisor and Appraisee Prep Form Functionality

The **Appraisor Prep Form's Embedded Links and Functions** provide a powerful easy to use tool for viewing and editing performance related information with a single click.

Appraisor's Prep Form Finger Tip Functionality:

- Displays the appraisee's Agreement
- Display/hide appraisee's and appraisor's color coded performance record notes under the appropriate performance measures
- View the appraisee's previous appraisal
- View the appraisee's Prep Form or self-assessment once the appraisee has released it to his or her Appraisor see appraisee's color coded comments and self-rating
- View or hide the multi-rater's color coded feedback displayed under the appropriate performance measures
- Print the Prep Form
- Convert the Prep Form to other formats Word, PDF, Image
- View a scaled down version for printing
- Release the Appraisor's Prep Form to the Appraisor's Manager or HR for approval prior to the Review Meeting (Appears only if part of the approval process)
- Transfer all comments and ratings to the Official Appraisal Form following the face to face employee/manager meeting

Appraisee's Prep Form Finger Tip Functionality:

- View the appraisee's Agreement
- Display/hide appraisee's and appraisor's **color coded** performance **record notes** under the appropriate performance measures
- View the appraisee's previous appraisal
- Release the appraisee's Prep Form or self-assessment to his or her Appraisor
- **Print** the Prep Form
- Convert the Prep Form to other formats Word, PDF, Image.
- View a scaled down version for printing
- Upload two related documents as attachments to the Prep Form

3. Official Appraisal Form

Appraisor's Official Appraisal Form Finger Tip Functionality:

- Displays the appraisee's Agreement
- Display/hide appraisee's and appraisor's **color coded** performance **record notes** under the appropriate performance measures
- View the appraisee's previous appraisal
- View the appraisee's Prep Form or self-assessment once the appraisee has released it to his or her Appraisor see appraisee's color coded comments and self-rating
- View or hide the multi-rater's color coded feedback displayed under the appropriate performance measures
- **Print** the Prep Form
- Convert the Prep Form to other formats Word, PDF, Image
- View a scaled down version for printing
- Release the Appraisor's Official Form to the Appraisor's Manager or HR for approval prior to the signature process (only if part of the approval process)
- Upload two attachments (Word, Excel, PDF, Email) such as scorecards etc.
- Transfer scores to the Summary and Performance Optimization Plan Form (POP Form See definition below)

4. Summary and Performance Optimization Plan (Summary POP)

The Appraisal Summary and Performance Optimization Plan (POP) Finger Tip Functionality:

- Appraisor e-signature page with time stamp
- Appraisor can un-sign the Summary Form by clicking on their signature (prior to e-signature by others in the approval process)
- Appraisor adds viewable summary comments above signature
- Appraisor views, edits confidential comments section viewable only to Higher Level Manager and HR
- The Summary displays scores, by measure with an Overall Performance Score with bar graph
- Provides **Performance Optimization Plan** including Training and Coaching Suggestions extracted from the appraisor, appraisee, and multi-rater feedback in the review
- Provides a link to the appraisee's Personal Development Plan within the Learning Management Module (only if Learning Management is activated)
- Link back to the Official Appraisal Form

TALENTPEAK™ DEFINITIONS



Definitions of Form Links

Job Description (if this feature is activated & has been released by CorpAdmin): Clicking this link shows the viewable version of the Appraisee's Job Description

Agreement: Opens the Performance Agreement to view or edit

Perf Record: Opens the page where Appraisor or Appraisee can View or Add **Performance Record Notes** to document good or poor work performance or behaviour throughout the performance period.

Appraisor Prep: Takes you to the **Appraisor Preparation (Draft) Form**. The Appraisor's PREP form <u>cannot</u> be viewed by the Appraisee, or anyone else; unless the feature to "allow its release" is activated in System Settings. (Appraisees have their own PREP Form, also called "Self-Appraisal").

Appraisal: Takes you to the **Official Appraisal Form** of the Appraisee (to be completed after the appraisal interview). The contents of the Appraisor Prep Form can be transferred into this form (individual measures, or the entire PREP Form contents in one step - see transfer links on the Appraisor Prep Form).

NOTE: The Official Appraisal Form <u>cannot</u> be viewed by the Appraisee from his/her login until such time as the Appraisor - and Higher Level Manager (HLM) if activated - signs off on the Appraisal (the HLM can e.g. be the Appraisor's boss or the Corp- or DivAdmin)

Summary/POP: Contains the Performance Percentage Calculations (or rating averages), **Performance Optimisation Plans**, and signoff links.

NOTE: The Summary/POP Form also <u>cannot</u> be viewed by the Appraisee from his/her login until such time as the Appraisor (and HLM if activated) signs off on the Appraisal.

Delete: Deletes an appraisal that has not been signed off yet

Other System Abbreviations and Definitions

HLM: Higher Level Manager

Apply Filter: Means to "sort" or "extract" by parameters from the database the on-screen view of report data or user data that you are trying to obtain

Clear Filter: Means to then "Delete" or "remove from view" the data sorted from the previous selected filter/or search parameters so a new search can be conducted. Note: without deleting or clearing the previously conducted search can result in not finding/incorrect/incomplete filtering of desired data or report view.

NRY: Means "not rated yet" (found on reports)

T: Means too early to assess (found on reports)

Appraisals started: Means Appraisor or Appraisee has started making entries on the Appraisal Forms (but nobody has signed off yet) (found on reports)

Appraisals not started yet: Means Appraisal has been created (e.g. Template downloaded), but no entries have yet been made on the Appraisal Forms by either the Appraisor or Appraisee (found on reports)

Perf Prd: Means the selected Performance Period (found on reports)

Yr Cum: Means Year Cumulative Average (relevant with 1-, 2-, 3-, 4-, or 6-monthly Appraisal Cycles) (found on reports)

Goal: Medium to long-term in focus (2 years plus), goals are formulated (starting with an action verb) as specific results/outcomes to attain by a certain date, e.g.: "Achieve 40% market share by Dec 31, 2010".

Objective: Short-term in focus (up to 2 years), Objectives are formulated as with Goals, e.g.: "Implement a new Accounting System by 'x' date". Additional Performance Standards are normally added to guide and measure jobholder performance. Objectives should be **SMART: S**pecific, **M**easurable, **A**ction-oriented, **R**esults-focused, **T**ime-bound.

KPI: Key Performance Indicators are OUTPUT MEASURES such as: Sales, Customer Satisfaction, Avg \$ Value per Transaction, Staff Retention, ROI, Market Share, etc.

Competency: Job-critical skills, knowledge, abilities, characteristics, attributes, and attitudes that combine to produce outstanding performance in a specific position. Examples of Competencies are: Interpersonal Skills, Leadership, Teamwork, Accuracy, Creativity, Customer Focus, Integrity, Selling Skills, etc.

Whereas Goals, Objectives, and KPIs have Performance Standards; Competencies and Values have Behavioral Indicators (these are prime behavior examples describing the Competency)

T-Lock: Means to Lock or unlock the template toggle

CORPADMIN REFERENCE GUIDE NAVIGATIONAL OVERVIEW

Navigational Guide Diagram

TalentP System	eak Administration				_		Welcome
Home	System Admin	Users Goals Appraisal	s PDPs R	eports Tutorials			
	Units Locations Job Titles Ad-Hoc Categories 360 Appraisal Titles System Settings Performance Periods Auto Emails Buk Emails	Users Browse Users Create New User Buk-Manage Users Import Users Browse 360 External Raters Create New 360 External Raters	Goals Goal Manager	Appraisals Appraisal Manager Create New Appraisal Buk-Create Appraisal Buk-Manage MR Appraisals 360 Appraisal Manager Create New 360 Appraisal Buk-Manage 360 Appraisal		PDPs	Reports Status Stats Performance & Status Performance Drildown Performance: Graphical Rating Trend Rating Distribution
	Goal Mgt Settings L&D Library	Import 360 External Raters		Template Manager 🕨	Template Database Competency Lbrary Rating Key Library		Summary / POPs Multirater Status 360 Aggregate 360 Trend PDP Status L&D Status L&D Status L&D Status

Instructions and Summary of Use

The first section of this comprehensive reference guide provides the CorpAdmin with detailed overview of what each navigational link or system setting means. This guide also includes <u>all</u> additional add-on system and module information for <u>CorpAdmins</u> contained in one central Reference Guide. (*Please refer to separate Guides for Appraisors & Apraisees for additional information*.)

The first section "System Admin" will review each of the settings needed (as seen above in the diagram) to set up your system; and should serve as a reference tool for when other features are enabled or when questions arise. Please use the Adobe Table of Contents with hyperlinks to navigate to specific topics or chapters for guided information. When questions arrive, using the built in Adobe "search" function, will help you to quickly obtain answers using a key word search function.

For initially using this guide, the suggested method would be to login to TalentPeak[™] in your CorpAdmin role, and with this PDF open; follow this guide page by page to become familiar with each of the settings, views, and options. In the "navigation" you may see that you do not have visible some of the tabs as shown here in the guide (see highlighted links in yellow below that are settings for optional modules). Please refer to this guide to familiarize you with these options, and then skip to the next page of instructions. If you have any difficulties or find missing information from this guide, please don't hesitate to contact customerservice@insightsforperformance.com.



(Navigation links highlighted in above diagram in yellow refer to optional systems & may not be viewable in your organization's site)

SYSTEM ADMINISTRATION

(Before proceeding, ensure that you are in the correct role as CorpAdmin; it will be highlighted in yellow.)

TalentPe System A	ak dministration		Syst	em Adn	nin >>	> Units	i						
Home	System Admin UB Units Locations Job Teles Ad-Hoc Categories 360 Apprasial Teles System Settings Performance Periods Auto Emails Buk Emails L&D Library	sers	Under chart)	System of your o	Admir rganis	n, Selec sation. T	t Units . Γo begin	On this , you wi	page you set I be adding yo	up the hierard our "Top Leve	chical structu el Units" first.	ıre (orgar	nisation
TalentPe	eak Administration								Voloomo		Come & dayler		
Home	System Admin	Users	Goals	Appraisals	PDPs	Reports	Tutorials		vercome	Access privileges:		in <u>Appraisor</u>	Sign Out
nome	Locations Locations Job Titles Ad-Hoc Categories 300 Appraised Titles System Settings Performance Periods Auto Emails Buk Emails Goal Mgt Settings L&D Library		Guas	Unit Ac Here you to powerful re Regions or unit, follow Once you h level of the from the d well as all's specific Div Existing U Unit Div HQ Div Add New Cick here to	Admin: Jac Admin: Jac	Reports ration herarchical st herarchical st horse, try ou can consecutively le d the organisa (f required). T i. A DNAdmin rther down (s be attached tc k Morgan Unit w top level unit	tructure of your p level UNITS to do it the stand were-level units. tion structure, i o do so, click ¹² o do so, click ¹²	organisation, oenter could d dard way with you can attach dit' next to th dit' next to th dit' next to th e unit (e.g. to	which will lead to easy fill g. be any of the following a Corporate Office as the Divisional Administrators e unit, and select the rele als of everybody in the at als of everybody in the at als of everybody in the at hyber to the lower units a separate divisions).	ering and g: Divisions, only top-level at to any unit vant Dividmin tached unit as s well). A			3igii Odu

Top Level Unit Definition Unit Administration Page

A top level unit (indicated in BLUE below) could e.g. be any of the following: Head or Corporate Office, Divisions, Regions, Departments, or Branches. Consider carefully how you want to set the system up.

If the organization is small (typically up to 100 employees), then enter one top level unit only (e.g. "HO" or "Corporate"), followed by the Divisions, Regions, Departments, or Branches on the next level. The result may look as follows:

HO / Corporate						
Marketing, Accounting, HR, Logistics	Branch A	Branch B				

With larger organizations you may wish to add the Divisions as top-level units, and add a unit called "Executive" to which you can attach the company President or CEO. In this case the result may look as follows (large Corporate Office):

Executive	Marketing	Accounting	HR	Operations
(President/CEO)	Advertising, PR	Acc Rec, Acc Pay	Payr, Recr, Traing, Adm	Branches A to Z

Below is another possible variation (small Corporate Office):

Corporate	Operations			
Marketing, Accounting, HR	Warehousing	Branches A - Z		

As mentioned previously, in this role you will be responsible for setting up and maintaining the system for your organisation.

FAQ: Is it compulsory to add the organization hierarchical structure?

ANSWER: No, but through the organization structure (and by "attaching" employees to their relevant units), the system links everybody together.

Other benefits of having the organization structure in place:

- Enables you to search for (filter) users and their appraisals according to units or sub-units.
- DivAdmins can be attached to top-level units (the use of DivAdmins, a hugely beneficial feature of the AS System, would become obsolete without an organization hierarchical structure been set up).
- Enables line managers to view the appraisal forms/docs of their "indirect" reports as well, i.e. those two levels and further down (in addition to their direct reports).
- Enables reporting of appraisal results (Reports Filter) by unit or sub-unit.
- Enables the bulk-creation of appraisals

TalentP	eak											
System	Administration							Welcome	Access privileges:	CorpAdmin DivAdmin	<u>Appraisor</u>	Appraisee
Home	System Admin	Users	Goals	Appraisals	PDPs	Reports	Tutorials			↑		Sign Out
	Units Locations Job Titles Ad-Hoc Categories 360 Appraisal Titles System Settings Performance Periods Auto Emails Buk Emails Goal Mgt Settings L&D Library			Unit Ac Here you c powerful re Regions or unit, follow Once you h level of the from the d well as all specific Div Existing C	dminist an build the porting ca Departme wed by the of have creates structure ropdown lis sub-units fr Admin can Juits	e hierarchical si pablity. The to nts, or you car consecutively le d the organisa (if required). T st. A DivAdmin urther down (s be attached to	tructure of you p level UNITS t d o it the stam wer-level units tion structure, o do so, click 'E will be able to s o NOT necessa o more than one	r organisation, which will lead to easy fil o enter could e.g. be any of the followin draway with a Corporate Office as the you can attach Divisional Administrator dif next to the unit, and select the rele see the appraisals of everybody in the a y to attach him/her to the lower units is unit (e.g. to separate divisions).	tering and g: Divisions, only top-level s to any unit vant DivAdmin ttached unit as ss well). A			
				Unit				Add Cub Unit				
				HQ Div Add New Click <u>here</u> t	rAdmin: Jao Top Leve to add a ne	ck Morgan I Unit w top level uni	t		s Eur Deidte			

On this page you set up the hierarchical structure (organisation chart) of your organisation.

Step 1: Click on "Click <u>here</u> to Add New Top Level Unit", and then add all your organisation's top level units in the field provided. Such "top level" units would normally be the different divisions of the organisation, but could also be regions or branches, etc. - whatever will be suitable in order to see the various major units of your organisation best and make them easily manageable within the system. Add a top-level unit "Executive" for your CEO/President and his/her PA (see FAQ 1 above for examples of unit setups).

Step 2: Click "Add Sub Units" to add consecutively lower unit levels. The system accommodates up to 10 vertical levels.

(NOTE: Your TalentPeak[™] Advisor/Consultant will review these settings with you in your orientation webinar.) Existing Units

	Show Staff Entire Tree
Unit	
HQ DivAdmin: Jack Morgan	Add Sub Units Edit Delete
Billing	Add Sub Units Edit Delete
∃ AR	Add Sub Units Edit Delete
Finance	Add Sub Units Edit Delete
Sales Expense Department	Add Sub Units Edit Delete
Finance	Add Sub Units Edit Delete
- HR DivAdmin: Andrea Azeman	Add Sub Units Edit Delete
Compensation and Benefits	Add Sub Units Edit Delete
🖃 Legal	Add Sub Units Edit Delete
□ Recruiting	Add Sub Units Edit Delete
□ Recruitment	Add Sub Units Edit Delete
Order Processing	Add Sub Units Edit Delete
Production	Add Sub Units Edit Delete
Sales	Add Sub Units Edit Delete
	Add Sub Units Edit Delete

Add New Top Level Unit Click <u>here</u> to add a new top level unit Sample Hierarchical Structure

TalentP	eak	Syste	em Adm	nin >>	• Locat	ions			
Home	Administration System Admin User Unts Job Tikles Ad-Hoc Categories 300 Appraisal Titles System Settings Performance Periods Auto Emails Gool Mgt Settings L&D Library	Pleas	e follow t	he ins	truction	s provid	ed on this TalentPea	k™ Locations page, see s	ample below:
System	Administration						Welcome	Access privi	
Home	System Admin Us	ers Goals	Appraisals	PDPs	Reports	Tutorials			
	Units Locations Job Titles Ad Hoc Categories 360 Appraisal Titles System Settings Performance Periods Auto Emails Buk Emails Goal Ngt Settings L&D Library		Locatic Specify all towns, sub As oppose system (go To edit exis button Austin Charlotte Chicago	the different burbs. Comb d to adding b to 'Import sting items,	t locations whe inations are a them manually Users'). select the tex	n re your organia so possible suc v here (one at a t to be changed	iation's units are situated, e.g. countrie h as 'Australia, Sydney'. r time), you can use the bulk import util I, make your changes, then click the 'Si <u>Save Changes</u> (Add	s, citles, ity of the vec Changes'	



System Admin >> Job Titles

Please follow the instructions provided on this TalentPeak[™] page, see sample below:

IMPORTANT: Abbreviate Job Titles longer than three words so they can show fully in system dropdown filters. <u>MAXIMUM 18</u> characters including spaces.







System Admin >> Ad-Hoc Categories

Ad-Hoc Appraisals

• Employee Appraisals that can be done at any time ("outside" the regular cycle) as and when required (e.g. for Probation, Promotion, Succession, Performance Improvement, etc.).

• Any number and type of Ad-Hoc Appraisals can be done per individual employee per Performance Period.

• Every Ad-Hoc Appraisal is "unique" or "standalone" in that there is no "carry-over" or "connection" between them or with Regular Appraisals in any way.

Add your relevant Ad-Hoc Appraisal Titles on this page. (Ad-Hoc Titles need to be created prior to adding an Ad-Hoc Appraisal template in the system):



	Administration							Welcome	Access priv
Home	System Admin	Users	Goals	Appraisals	PDPs	Reports	Tutorials		
_	Units								
	Locations								
	Job Titles			Ad-Hoc	Catego	ories/Tar	get Groups		
	Ad-Hoc Categories	1		Specify the	different Ad	I-Hoc Appraisa	al Categories and T	arget Groups you would like the	system to
	360 Appraisal Titles	1		administer.					
	System Settings			 Exar 	nples of Ca	egories: Proba	ation, Promotion, S	Succession, Performance Improve	ment.
	Performance Periods			 Exar Staf 	nples of Tar	get Groups: S	Senior Management Sales Managers S	t, Middle Management, Superviso ales Staff, etc.	rs, Worker-Level
	Auto Emais				,				
	Ruk Emais			Combine Ca	itegories an	d Target Grou	ps as follows (as o	one entry), e.g.:	
	Card Mat Sattin as			 Prob 	ation, Mana	gement			
	doarnig: securitys			 Prob Pron 	ation, Work	er-Level Staff			
	LOD LIDIARY			 Perfe 	ormance Im	provement, Sa	les Staff, etc.		
				To edit exis button	ting items,	select the text	to be changed, m	ake your changes, then click the	'Save Changes'
								Save Changes Add New Cate	gory/Target Group
				90 Day New	Hire				X
				90 day new	nre Part Tim	8			×
				MR - Direct	Report				×
				MR - Interna	l Customer F	eedback			×
				MR - Peer Fe	edback				×
				Performano	e Improveme	nt - Management	t		×
				Deefermane	T				
				Performance	e improveme	nt - Non manage	ment		^
ep	2:			PIP Probation	e improveme	nt - Non manage	ment		×××
ep :	2:			Probation	2 Improveme	nt - Non manage	ment		×
ep 2	2: Peak Administration			Probation	2 Improveme	nt - Non manage	ment	Welcome	Access
ep NentP stem	2: Peak Administration System Admin	Users	Goals	Probation Probation Probation	PDPs	Reports	Tutorials	Welcome	Access
ep : ientF stem ome	2: Peak Administration System Admin	Users	Goals	Appraisals Add-Ho Specify th administer	PDPs c Categ e different / mples of C mples of T	Reports ories/Ta Ad-Hoc Apprata ategories: Pro arget Groups:	Tutorials Tutorials rget Groups sal Categories and bation, Promotion Senior Managem	Weicome S I Target Groups you would like th , Succession, Performance Impro ri, Middle Management, Supery	Access Access ne system to vement. sors, Worker-Level
ep :	2: Administration System Admin	Users	Goals	Probation Pro- Probation Appraisals Add-Ho Specify th administer • Ex: • Str. Str. Str. Str. Str. Str.	PDPs c Categ e different / imples of C mmples of T ff, Technici categories a	Reports ories/Ta Ad-Hoc Apprais ategories: Pro arget Groups: ans, Engineers and Target Groups	Tutorials rget Group: sal Categories ancount bation, Promotion Senior Managers, 5, Sales Managers, 5, Sales Managers,	Welcome 3 I Target Groups you would like th , Succession, Performance Impro rn, Middle Management, Supervi Sales Staff, etc. s one entry), e.g.:	Access he system to overnent. sors, Worker-Leve
ep :	2: Administration System Admin	Users	Goals	Probation Provember 2011 Provember 2	PDPs c Categ e different / amples of C mples of T ff, Technick atton, Wo pation, Wo formance In	Reports ories/Ta ad-Hoc Apprata ategories: Pro arget Groups: ans, Engineers and Target Groups and Target Groups and Target Groups ager-Level Same ager-Level S	Tutorials rget Groups sal Categories anco Salos Managers, Sales Managers, Sales Managers, Sales Staff, etc.	Welcome 3 I Target Groups you would like th , Succession, Performance Impro rat, Middle Management, Supervi Sales Staff, etc. s one entry), e.g.:	Access he system to wement. sors, Worker-Leve
ep : ientF stem	2: Administration System Admin	Users	Goals	Appraisals Appraisals Add-Ho Specify th administer Exc Exc Pro-	PDPs c Categ different / imples of T ff, Technici atagores a bation, Marchanov atabian, Warrishi (the second secon	Reports ories/Ta Ad-Hoc Apprais tategories: Pro arget Croups; ans, Engineers ans, Engineers ans, Engineers and Target Groups; approvement, 5 , select the te	Tutorials rget Groups sale Categories and Sener Hanagere s, Sales Managers, s, Sales Staff, etc. xt to be changed,	Welcome S I Target Groups you would like th .Succession, Performance Impr nt, Middle Management, Supervi Sales Staff, etc. s one entry), e.g.: make your changes, then click th	Access he system to overnent. sors, Worker-Leve
ep : lentF stem ome	2: Administration System Admin	Users	Goals	Appraisals Appraisals Appraisals Add-Ho Specify th administer Exx Exx Exx Combine C Pr	PDPs c catego mples of C fractional attegores at bation, Ma bation, Ma bation	Reports ories/Ta ad-Hoc Apprais ategories: Pro arget Groups: and Target Groups and Target Groups approvement, s , select the te , select the te	Tutorials rget Groups sal Categories anc bation, Promotion Senior Managers, Sales Managers, Sales Managers, sales Managers, the sales Staff, etc. xt to be changed, bation	Weicome S I Target Groups you would like th , Succession, Performance Impro rin, Midle Maagement, Supervi Sales Staff, etc. s one entry), e.g.: make your changes, then click th	Access he system to ovement. sors, Worker-Leve

Consult the separate Ad-Hoc Appraisal User Guide, or section in APPRAISORS User Guide & for use. (<u>Refer to Ad-HOC</u> <u>Appraisals in Knowledgebase</u>)



System Admin >> 360 Appraisal Titles

Cross Reference System Admin>>System Settings for additional settings Compass360

Add the 360 Appraisal Titles (Questionnaire names) you want to use (see examples in screenshot below):

- "CT" = Context-Targeted
- "G" = Generic

There is no requirement to add these abbreviations as 360 questionnaire titles such as **Managers**, **Investment Team**, **Leadership**, etc. will be perfectly fine – whatever titles you deem appropriate to differentiate between your various questionnaires and the target groups they aim at.

The system allows for the creating of two different types of 360 Appraisa	ls:
1. CONTEXT-TARGETED: Rater Group-specific question sets, with a separate rep Group. This allows for more targeted questions to (and hence more meaningfu specific Rater Group in respect of its unique working relationship with the App 2. GENERIC: Same set of questions for all Rater Groups, with a combined report administer, but potentially less accurate and meaningful, as some question iter relevant in respect of a specific Rater Group's unique working relationship with	ort for each Rater Il feedback from) a raisee. These are simpler to ns may not be fully the Appraisee.
Add the 360 Appraisal Types/Titles you would like the system to administ CONTEXT-TARGETED: Manager/s, Direct Reports, Peers, Internal Customers, E Suppliers, etc. GENERIC: Leadership, Management Skills, Customer Service, Interpersonal Skil	er, e.g.: ixternal Customers, s, etc.
To edit existing items, select the text to be changed, make your changes, then c outton	ick the 'Save Changes'
To edit existing items, select the text to be changed, make your changes, then c button <u>Save Cha</u>	ick the 'Save Changes'
To edit existing items, select the text to be changed, make your changes, then c button <u>Save Cha</u> 1. Manager/s (f/back to Non-Mgrial Staff) (15 Competencies)	ick the 'Save Changes' nges Add New 360 Title
To edit existing items, select the text to be changed, make your changes, then c button Save Cha 1. Manager/s (f/back to Non-Mgrial Staff) (15 Competencies) 2. Snr Manager/s (f/back to Mid/Jnr Mgrs) (16 Competencies)	ick the 'Save Changes' nges <u>Add New 360 Title</u> >
To edit existing items, select the text to be changed, make your changes, then coutton Save Cha A Manager/s (f/back to Non-Mgrial Staff) (15 Competencies) S. Snr Manager/s (f/back to Mid/Jnr Mgrs) (16 Competencies) 3. Exec Manager/s (f/back to Snr Mgrs) (16 competencies)	ick the 'Save Changes' nges <u>Add New 360 Title</u> 7 7
To edit existing items, select the text to be changed, make your changes, then coutton Save Cha Save Cha Anager/s (f/back to Non-Mgrial Staff) (15 Competencies) S. Snr Manager/s (f/back to Mid/Jnr Mgrs) (16 Competencies) S. Exec Manager/s (f/back to Snr Mgrs) (16 competencies) Customers	ick the 'Save Changes' nges <u>Add New 360 Title</u> 7 7 7 7
Fo edit existing items, select the text to be changed, make your changes, then c button Save Cha 1. Manager/s (f/back to Non-Mgrial Staff) (15 Competencies) 2. Snr Manager/s (f/back to Mid/Jnr Mgrs) (16 Competencies) 3. Exec Manager/s (f/back to Snr Mgrs) (16 competencies) Customers Direct Reports	ick the 'Save Changes' nges <u>Add New 360 Title</u> 7 7 7 7 7
To edit existing items, select the text to be changed, make your changes, then coutton Save Cha 1. Manager/s (f/back to Non-Mgrial Staff) (15 Competencies) 2. Snr Manager/s (f/back to Mid/Jnr Mgrs) (16 Competencies) 3. Exec Manager/s (f/back to Snr Mgrs) (16 competencies) Customers Direct Reports Leadership	ick the 'Save Changes' nges <u>Add New 360 Title</u> 7 7 7 7
To edit existing items, select the text to be changed, make your changes, then c button Save Cha 1. Manager/s (f/back to Non-Mgrial Staff) (15 Competencies) 2. Snr Manager/s (f/back to Mid/Jnr Mgrs) (16 Competencies) 3. Exec Manager/s (f/back to Snr Mgrs) (16 competencies) Customers Direct Reports Leadership Manager/Supervisor	ick the 'Save Changes' nges Add New 360 Title > > > > > > > > > > > > > > > > > > >

Refer to TalentPeak Compass360 in this Guide for complete information (click here)

System Administration Home System Admin Users Uhts Locations Job Tites Ad-Hoc Categories 300 Appraisel Titles System Settings Performance Periods Auto Emals Goal Mgt Settings Lob Library Lib Library

Make your selections by following the instructions provided on the page and with your TalentPeak[™] advisor/consultant. Please ask us to assist you with this important task to make sure that the system is tailored and optimised for your needs. The System Settings will cover many features to edit such as Access Rights, Creating Appraisal Page Options, Removing Rating Keys, Disabling Weightings, Forced Comment Features, Higher Level Manager Signoff, Form Release & Approval Settings, Job Description Activation, Employee User File & Photo settings, Appraisee & Appraisor Home Page Instructions, & Spell Checker. Also See <u>Multirater</u> Module and Options.

Designating CorpAdmin & UserAdmin

A User Administrator or System Administrator Assistant can be enabled to be provided with access to the system pages for maintaining User Files. With additional permission granted, the User can assist with Appraisal Templates, Competency and Rating Key Libraries, and Job Description setup/admin tasks.

This system can be Save Settings	customised to suit yo	ur specific organisational requirements. Please modify the settings below, then cl
Primary CorpAdmin	Carter, Dan	All users with CorpAdmin status appear in this dropdown list, but only one user at can be selected as the "primary" CorpAdmin. The primary CorpAdmin is the only per who has access to "System Settings" and "Performance Periods" (being highly sens pages). However, all other functions available to the primary CorpAdmin are also avail to the secondary CorpAdmins.
		All "Contact Administrator" links on all system pages for all users to link through to Primary CorpAdmin contact details, and not that of their assigned DivAdmins.
UserAdmin	White, Ben	(Optional) Select an employee who will be enabled to add new users, and edit the Us Files of existing users for the entire organisation (via a UserAdmin role link that will for this person only).
-		Include access to the Template Manager page, Competency and Rating Key Libraries

System Admin >> System Settings

With the selected employee designated as "UserAdmin", the following Access Privilege & User Icon will be enabled within their login:

Access privileges:	UserAdmin	Appraisee
	I	Sign Out

The following additional system pages will be accessible:

Perform	ance Appraisal System
Users	Appraisals
	Ternate Manager
	if activated Competency Library Rating Key Library

NOTE: If Compass360[™] is enabled on your system, please refer to this <u>Section</u> **Compass360[™]** for additional settings and for the enablement of a 360 "UserAdmin" for survey set up and monitoring purposes.

Performance Cycle & Anniversary Based Settings

Please refer to your TalentPeak[™] Advisor/Consultant before making changes to performance cycles; we will be reviewing these settings with you in your initial site set up webinars. Performance Periods are created according to your settings in the previous step. Any number of periods can be created, but you will just need the current one, and the next one.

Performance	Cycle 1		
Appraisal Frequenc	Y Annual	This frequency should not be changed during the course of so when necessary at the start of the next one. A Perform as the Financial Year of an organisation.	a Performance Year. Only do ance Year is normally the same
Cycle Start	January 🔻	Select the FIRST month of the Performance Year (even if a	already past for this year).
Complete Appraisa	s 180 days after Perf Period	Once a Performance Period has finished, within how many Appraisals be completed by?	calendar days should all
Perf Period Display	5	Please indicate the number of performance periods you wo system. Allow for the desired number of previous perform well as the next one (e.g. 3 previous +1 current + 1 future	ould like displayed in the ance periods, the current as a = 5 total).
Anniversary-Base	ed Appraisals		
Set System for Please make sur or Quarterly.	Anniversary-Based Appraisals (thi e to set the Appraisal Frequency t	s sets Appraisal Dates according to Start Dates in o any one of the following options: Annual, Six-m	n employee User Files). nonthly, Four-monthly,
Performance Rec	ord Functionality		
Disable for App	raisors and Appraisees		
Disable for App	aisees ONLY (select one of the th	ree variations below)	
Activate feature	for Appraisors to hide individual P	erformance Record Notes from Appraisees	
Header and Foot	and Footor Fields on Approical Fo		
Activate fielder	and rooter news on Appraisario		
Enter up to th	ree Header Field Titles/Heading	S	
Example: W These will an	nat has been your biggest achieve near on Pren and Official Appraisal	Forms: Ad-Hoc Appraisals excluded	
 Fields not us 	ed will not show on the Appraisal	Forms	
H/Field 1 What	t has been your biggest achievement t	his review period?	
H/Field 2]
H/Field 3]
Enter up to fiv	e Footer Field Titles/Headings.	Examples:	
 "What interest 	sts you most & least about your j	ob?"	
 "What do yo 	u enjoy and what are your frustra	tions in your job?"	
"What training	ng and development would you be	nefit from?"	
"What are y "Goals/Object	tives for the next review period"		
F/Field 1 Goal	/Objectives for the next review period		
F/Field 2 "Wh	at are your career ambitions?"		

Knowledgebase FAQ - Performance Period

TalentPeak[™] divides a Performance Year into evenly-spaced Performance Periods (or Cycles), each ending with Performance Appraisals for all employees. For example, Quarterly Appraisals translate into four, three-monthly Performance Periods. The Corporate System Administrator can set TalentPeak[™] at any of 1, 2, 3, 4, 6, or 12-monthly Performance Appraisals on the System Settings Page.

Performance Periods are set for the entire organization, and not individual employees. This way TalentPeak[™] can logically cluster all appraisals together that take place during the same Performance Period. TalentPeak[™] accommodates two different Performance Cycles, e.g. exempt employees on an annual cycle, and non-exempt on a quarterly cycle. (*Please see instructions on Systems Settings webpage for Performance Cycle 2 enablement.*)

Performance Record Functionality

Performance Record Note functionality can be disabled (is on or enabled by default); see various settings available:

Performance Record Functionality

- Disable for Appraisors and Appraisees
- ☑ Disable for Appraisees ONLY (select one of the three variations below)

Appraisee cannot add or view Performance Record Notes

- Appraisee cannot add Performance Record Notes but can view the Appraisor's
- Appraisee cannot view the Appraisor's Notes but can add their own
- Activate feature for Appraisors to hide individual Performance Record Notes from Appraisees

Header & Footer Fields

Activate Header & Footer Fields on Appraisal Form - is viewable on all employees, default is "off".

Header and I	F ooter Fields eader and Footer Fields on Appraisal Form
Enter up fExamplTheseFields r	to three Header Field Titles/Headings le: "What has been your biggest achievement this review period?" (100 char max) will appear on Prep and Official Appraisal Forms; Ad-Hoc Appraisals excluded not used will not show on the Appraisal Forms
H/Field 1	What has been your biggest achievement this review period?
H/Field 2	
H/Field 3	
Enter up • "What • "What • "What • "What • "Goals/	to five Footer Field Titles/Headings. Examples: interests you most & least about your job?" do you enjoy and what are your frustrations in your job?" training and development would you benefit from?" are your career ambitions?" (Objectives for the next review period"
F/Field 1	Goals/Objectives for the next review period
F/Field 2	"What are your career ambitions?"
F/Field 3	
F/Field 4	
F/Field 5	

Assessment Methods

Activate Assessment Method tick-boxes on Appraisal Form

Assessment	Methods ssessment Me	ethod tick-boxes on Appraisal Form
Typically us Test, Demo	ed for skills/o	competency accreditation purposes. Examples of Assessment Methods are: Written Test, Practical bservation, Assignment, Evidence Portfolio, Peer Review, etc.
Enter up to Fields not u) five assessr used will not :	nent methods below (10 characters each maximum) show on the Appraisal Forms
Method 1	Written]
Method 2	Observed	
Method 3	Demstd	
Method 4		
Method 5		

Browse Users/Contact Manager Settings

Disable or Enable Users to Search for other Users



Settings Relevant to Both Performance Cycles

DivAdmin Access Rights Settings

Settings Relevant to Both Performance Cycles

DivAdmin Access Rights

- Disable access to the Template Manager page
- Allow only allocated units to be viewable on the Browse Users page
- Disable ability to create appraisals
- Disable ability to add new users

Appraisor Create New Appraisal Page Options

As each option is disabled only those options that are enabled appear in the Create New Appraisal page. See Below Images & Options:

View 1 - No selections

- Appraisor Create New Appraisal Page Options Disable any one or more of the following Appraisor appraisal creation option:
- Disable 'Download Appraisal Template from Database' option
- Disable 'Create New Appraisal' option
- Disable 'Continue Appraisal' option
- Disable 'Copy Appraisal To Other Team Members' option
- Disable 'Select Ad-Hoc Appraisal Options'

Creation Page View with none checked above (Default):



Appraisor Create New Appraisal Page Option – View 2



Creation Page View with the above/previous checked

Create New Appraisal					
Create a new appraisal by selecting an employee name and a Performance Period from the dropdown lists below; then selecting one of the Appraisal Options.					
1. Select Employee Please select an employee below. If this person does not appear in the list, contact your <u>System</u> Administrator	3a. Select Regular Appraisal Option <u>Create New Appraisal</u> Allows you to create a Performance Agreement (add Goals, Objectives, KPIs, Competencies, etc.) for the selected employee from scratch. This option is normally used if there is no Appraisal Template for this person's Job Title in the Appraisal Template Database.				
Please select 👻	Continue Appraisal (copy appraisal forward)				
2. Select Performance Period Please select the Performance Period you wish to create the appraisal for.	Appraisal, through to the selected Performance Period (normally the new current one). This option should be used when the employee's performance requirements will not be (much) different from that expected in the previous Performance Period. Changes can still be made after copying it "forwards" in this way. 3b. Select Ad-Hoc Appraisal Option				
1 Jan 2011 - 31 Dec 2011 (current) 👻	Download Ad-Hoc Appraisal Template from Database				

Appraisor Create New Appraisal Page Option - View 3

 Appraisor Create New Appraisal Page Options

 Disable any one or more of the following Appraisor appraisal creation option:

 Disable 'Download Appraisal Template from Database' option

 Disable 'Create New Appraisal' option

 Disable 'Continue Appraisal' option

 Disable 'Copy Appraisal To Other Team Members' option

 Disable 'Select Ad-Hoc Appraisal Options'

Creation Page View with above checked

Create New Appraisal

Create a new appraisal by selecting an employee name and a Performance Period from the dropdown lists below; then selecting one of the Appraisal Options.

1. Select Employee Please select an employee below. If this person does not appear in the list, contact your <u>System</u> <u>Administrator</u>	 3a. Select Regular Appraisal Option <u>Download Appraisal Template from Database</u> Downloads the default Appraisal Template for the selected employee's Job Title. You can the customise its contents (plus add further Goals, Objectives, KPIs, etc.) based on local conditions and employee-specific position requirements and targets. However, no changes can be made if the template was "locked" by the System Administrator (individual measure: 				
Please select 👻	, can also be locked).				
2. Select Performance Period Please select the Performance Period you wish to create the appraisal for. Continue Appraisal (copy appraisal forward) Copies the Performance Measures and Standards o Appraisal, through to the selected Performance Per option should be used when the employee's perforr different from that expected in the previous Perforr after copying it "forwards" in this way.		<u>d)</u> andards of the selected employee's previous nance Period (normally the new current one). This 's performance requirements will not be (much) is Performance Period. Changes can still be made			
1 Jan 2011 - 31 Dec 2011 (current) 🔻	▼ 3b. Select Ad-Hoc Appraisal Option				
	Please Select				

Remove Rating Keys from Appraisal Forms

Remove Rating Keys from Appraisal Forms

Ticking this box will remove the Rating Keys from all appraisal forms. It will also obviate the need to add weightings for Performance Measures. The system will then also not display any performance percentage calculations or rating averages. Please note that this will be true for ALL appraisals in the system; also for those ones that have already been created, rated and signed off. The percentage calculations or rating averages of such existing appraisals will not be deleted; it will just be hidden.

Disable Weightings and Performance Percentages

Disable Weightings and Performance Percentages

Ticking this box will remove the need to add weightings to Appraisal Performance Measures. The system will also not display any performance percentage calculations. Please note that this will be true for ALL appraisals in the system; also for those ones that have already been created, rated and signed off. The percentage calculations of such existing appraisals will not be deleted; it will just be hidden.

Appraisal Form Comments-Force Feature

Appraisal Form Comments-Force Feature

Activate Comments-Force Feature for all ratings other than 3.

Agreement Release to Appraisee

Agreement Release to Appraisee

🗹 Ticking this box will enable an Appraisor to (temporarily) release a Performance Agreement Form to an Appraisee (to edit).

Higher Level Manager Signoff

Higher Level Manager Signoff

Add a third level signoff field in the Appraisal Summary/POP Form (for higher level manager or CorpAdmin/DivAdmin) NB: Only change this setting at the start of a new Performance Period.

System Settings view, with Higher Level Manager (HLM) Signoff feature NOT activated:



Additional System Settings view, with Higher Level Manager (HLM) Signoff feature activated:

Higher Level Manager Signoff Higher Level Manager Signoff field in the Appraisal Summary/POP Form (for higher level manager or CorpAdmin/DivAdmi NB: Only change this setting at the start of a new Performance Period.	ר)
Appraisor Prep Form Release Activate feature on Appraisor Prep Form to release it to: Appraisee. Higher Level Manager (HLM) Corp- and DivAdmin Approval required from Corp- or DivAdmin.	
Official Appraisal Form Approval Activate feature on Official Appraisal Form (in Appraisor role) to request its approval from: Higher Level Manager (HLM)	

Appraisor Prep Form Release (and optional Approvals)

Appraisor Prep Form Release Activate feature on Appraisor Prep Form to release it to:	
Appraisee.	
Higher Level Manager (HLM) Approval required from HLM.	
Corp- and DivAdmin 🗌 Approval required from Corp- or DivAdmi	n.

System Settings: You can select any one or more recipients, depending on who you want Appraisors to release their completed Preps to.



It will show as follows on the **Appraisor Prep Form**, which he/she can then tick (any one or more) to release it to the respective parties. Ticking will trigger a system-generated email to them.



It shows released as follows on the Appraisal Manager page of those parties it was released to (red link):





Appraisor Prep Shows Red when Released to View

The **System Settings** can also optionally be activated to **require approval of the Appraisor Prep** by the Corp-/DivAdmin and/or HLM (if latter activated).

Higher Level Manager Signoff		
Add a third level signoff field in the Appraisal Summary/POP Form (for higher level man NB: Only change this setting at the start of a new Performance Period.		
Appraisor Prep Form Release Activate feature on Appraisor Prep Form to release it to:		
🗹 Appraisee.		
🗹 Higher Level Manager (HLM) 🛛 🗹 Approval required from HLM.		
Corp- and DivAdmin Approval required from Corp- or DivAdmin.		

On the released Appraisor Prep Form it will show as follows (example below that of Corp-/DivAdmin role)

signed the appraisal off on the Summary/POP Form.
Release Prep to Higher Level Manager APPROVED: Not Yet
Release Prep to Corp- and DivAdmin APPROVED: Not Yet approve now
Release Prep to Appraisee
Show Performance Record Not
1. Accuracy

And when approved:

Release Prep to Hig	her Level Manager APPROVE	D: Not Yet		
Release Prep to Co	p- and DivAdmin APPROVED	Bob Green 13 Se	ep 2010 <u>undo approval</u>	
🗹 Release Prep to App	oraisee			

NOTE: The system-generated email for the Corp-/DivAdmin will go to BOTH, if a DivAdmin was assigned to the Appraisee's unit as well. Both Corp- and DivAdmin/s will be able to view the released Appraisor Prep Form, and either one can approve it (if approval feature activated), so please decide and communicate WHO should approve the Appraisor Prep Form: Corp- or DivAdmin (same applies to Official Appraisal Form as explained below).

Official Appraisal Form Approval

Official Appraisal Form Approval

Activate feature on Official Appraisal Form (in Appraisor role) to request its approval from:

Higher Level Manager (HLM)

Corp-/DivAdmin

System Settings view, "Enforce Approval" feature NOT activated:



With BOTH (Admins & HLM) activated, it shows as follows on the Official Appraisal Form in the Appraisor Role, which he/she can then activate once satisfied with its accuracy: Again, the system will send out emails to the respective parties.



Corp-/DivAdmin role view

Appraisor has signed the appraisar on on the Summary/POP	rom.
Request approval from Higher Level Manager APPROVED	: Not Yet
Request approval from Corp- or DivAdmin APPROVED: N	ot Yet approve now
	Show Performance Record Notes

With the "ENFORCE APPROVAL" feature activated in System Settings...

Official Appraisal Form Approval Activate feature on Official Appraisal Form (in Appraisor role) to request its approval from: Higher Level Manager (HLM)
Corp-/DivAdmin Corp-/DivAdmin Enforce approval to allow click-through to Summary/POP Form (applies to current and the summary/POP Form (applies to current and the summary/POP Form (applies to current and the summary) applies to current and the summary of the

...approval by the respective parties will be mandatory, otherwise the following alert will show when anybody wants to click the **Summary/POP Form** link:



NOTE: This will only be true for current and future performance periods

Appraisal Manager View Options with Various Settings Enabled:

	• Perf Cy Filter	cle 1: Quarterly O Perf Cycle 2: Annu	ually
	Туре	Regular Appraisals	~
	Options	Appraisees with Appraisals	Appra
	Perf Period	Appraisees with Appraisals	Job T
	Location	Appraisees without Appraisais Appraisor Appraisal Preps not completed	Appra
	Unit	Appraisee Appraisal Preps not completed	
	Appraisee L	Appraisors signed off	
	ABCDEE	HLMs signed off Appraisees signed off	ΥZ
		Appraisors not signed off	all Appra
		Appraisees not signed off	
		Appraisals overdue (already created)	
Job Title		Appraisor Preps released	
JOD TILE		Appraisor Preps not released	
		Released Appraisor Preps approved Released Appraisor Preps not approved	
HR Manager		Official Appraisal Forms approved Official Appraisal Forms not approved	: Not yet

Job Descriptions

Job Descriptions

Activate Job Description Functionality

Also See Job Description Template Builder in this Section

Multirater Module

Multirater Module

- Hide Appraisee 'Multiraters' link. Ticking this box will remove the MULTIRATERS link from the Appraisee logon. The default (i.e. UN-ticked) allows the Appraisee to view the Multirater Narrative and Graphical Reports on Appraisor appraisal signoff (individual Multirater feedback will still be hidden).
- Ide the VIEW column on the MULTIRATERS page (to prevent the viewing of individual Multirater feedback).
- Hide the Decline Selector on the Multirater Questionnaires
- Activate Questionnaire Comments-Force Feature (select one of the two variations below):

(If you do not want the Multirater Module for your organization, it can be disabled (*or enabled* if you do not currently have it on,) by IFP tech support.) The CorpAdmin has the ability to activate or de-activate settings for the Multirater Module. The Appraisees (by default) can also view the Multirater Reports from their login, once the Summary/Pop Form has been signed off; but CorpAdmins have the ability to de-activate the MULTIRATERS link on the Appraisee's side if they so wish. Please also refer to the **APPRAISORS User Guide for Managers** and the information in this <u>Section</u>.

Compass360 Appraisals (if enabled)

360 Appraisals	
Disable line manager	s from creating 360 Appraisals for direct reports (select one of the two variations below):
Fully disable line mar want to manage 360 managers will also no	nagers' role with 360 Appraisals. This feature to be activated by organisations (and 360 Bureaus) that Appraisals only at the centralised level, and fully exclude line managers from the process (line ot be able to view the 360 Appraisals of their direct and indirect reports).
Enable 360 Appraise	es to add their own 360 Raters (select one of the two variations below):
Hide the Decline Sele	ctor on the 360 Questionnaires.
Hide the Narrative Re	eport 'Split Version' option (so individual Rater Group feedback does not show).
Activate Questionnai	re Comments-Force Feature (select one of the two variations below):
-	
Please select	 (Optional) The CorpAdmin selected here can create and manage 360s, but cannot view the 360 reports (this should not be the Primary CorpAdmin)

Employee User File Self-service

Employee User File Self-service

Allow users to update their email address, work phone and physical/postal address details

User Photos

User Photos

Activate feature to allow user photo upload to User Files (by Corp- & DivAdmins)
 Also enable upload by: Appraisors Appraisees

Appraisor and Appraisee Home Page Instructions

Appraisor and Appraisee Home Page Instructions							
Appraisor:	۲	Use Default Instructions	View	0	Add Own Instructions	View	Edit
Appraisee:	۲	Use Default Instructions	View	\bigcirc	Add Own Instructions	View	Edit



System Admin >> Performance Periods

Follow the instructions provided. Performance Periods are created according to your settings in the previous step. Any number of periods can be created, but you will just need the current one, and the next one.

Knowledgebase FAQ - Performance Period

TalentPeak[™] divides a Performance Year into evenly-spaced Performance Periods (or Cycles), each ending with Performance Appraisals for all employees. For example, Quarterly Appraisals translate into four, three-monthly Performance Periods. The Corporate System Administrator can set TalentPeak[™] at any of 1, 2, 3, 4, 6, or 12-monthly Performance Appraisals on the System Settings Page.

Performance Periods are set for the entire organization, and not individual employees. This way TalentPeak™ can logically cluster all appraisals together that take place during the same Performance Period. TalentPeak™ accommodates two different Performance Cycles, e.g. exempt employees on an annual cycle, and non-exempt on a quarterly cycle.



TalentPe System	eak Administration	
Home	System Admin	Users
	Units Locations Job Titles Ad-Hoc Categories 360 Appraisd Titles System Settings Performance Periods (Auto Emails) Buik Emails Goal Mgt Settings L&D Library	

System Admin >> Auto Emails

Set automated email reminders for **Regular and Ad-Hoc Appraisals**. Follow the instructions provided; please ask your TalentPeak[™] advisor/consultant or email support for help.

Automated Email Reminders
APPRAISORS
1. Automated Email to Appraisors: Before the Appraisal Date Send an automated email (\underline{VIEW}) to Appraisors the set number of days prior to the appraisal date (as set in individual Appraisee Performance Agreement Forms).
Set number of days: 30 💌
Include Ad-Hoc Appraisals (VIEW)
2. Automated Email to Appraisors: After the Appraisal Date Send an automated email (<u>VIEW</u>) to Appraisors every set number of days for a set number of times after the individual Appraisee appraisal date (until the Appraisor has signed off).
Send email every 7 🔽 days, a maximum of 3 💌 times.
Include Ad-Hoc Appraisals (VIEW)
HIGHER LEVEL MANAGERS
Automated Email to HLM: After Appraisor Signoff Send an automated email (\underline{VIEW}) to HLMs every set number of days for a set number of times after the date the Appraisor has signed off the appraisal (until the HLM has signed off).
Send email every None 💌 days, a maximum of None 💌 times.
Include Ad-Hoc Appraisals (VIEW)
APPRAISEES
1. Automated Email to Appraisees: Before the Appraisal Date Send an automated email (<u>VIEW</u>) to Appraisees the set number of days prior to the appraisal date (as set in individual Appraisee Performance Agreement Forms).
Set number of days: None
Include Ad-Hoc Appraisals (VIEW)
2. Automated Email to Appraisees: After the Appraisal Date Send an automated email (<u>VIEW</u>) to Appraisees every set number of days for a set number of times after the date the Appraisor (or HLM if activated) has signed off the appraisal (until the Appraisee has signed off).
Send email every None 💌 days, a maximum of None 💌 times.
✓ Include Ad-Hoc Appraisals (<u>VIEW</u>)

System Admin >> Bulk Emails



Please follow the instructions provided, see Sample below:

Use the functionality on this page to create, save and send customised, SCHEDULED and/or INSTANT emails to selected recipients (specific units, locations, or even the entire organisation). You can also select to send these to Appraisors only, or to all employees. Scheduled Bulk Emails Email 1: Sexual Harassment Training [edit] [delete] O Active Pause Email Recipients Send This Email Now Send this email on the None 💌 day of the following selected months: Select recipients/check recipients Jan Feb Mar Apr May Jun names under "Email Recipients' Jul Aug Sep Oct Nov Dec Email 2: [edit] [delete] Active Pause Email Recipients Send This Email Now Send this email on the None 💌 day of the following selected months: 🔲 Jan 🔲 Feb 🔲 Mar 🔲 Apr 🔲 May 💭 Jun Jul Aug Sep Oct Nov Dec Email 3: Competency Updates [edit] [delete] O Active Pause Email Recipients Send This Email Now Send this email on the None 💌 day of the following selected months: Jan Feb Mar Apr May Jun Jul Aug Sep Oct Nov Dec Instant Bulk Emails To create a new instant bulk email, Click Here Email 1: Test Bulk Email [edit] [delete] Email Recipients Send This Email Now [edit] [delete] Email 2: Email Recipients Send This Email Now Email Recipients × ٠ **Email Recipients** Ξ Sexual Harassment Training Tick 'No Send' for employees who should not receive the email Recipient Job Title Unit Location Email Adam Field Supervisor Service Operations FDCSS laban654@aol.com Kapcsos



System Admin>>Goal Management Settings

If enabled for your organization the System Admin Goal Management Settings will be viewable. Please also refer to the Summit Goal Management™ System Section of this Guide or separate User Guide for more information.

u	8D Library										
TalentP	eak										
System /	Administration							Welcome			
Home	System Admin	Users	Goals	Appraisals	PDPs	Reports	Tutorials				
	Units										
	Locations					Goal Mana	aomont S	Sottings			
	Job Titles	Goal Management Settings									
	Ad-Hoc Categories					Scorecard Per	spectives				
	360 Appraisal Titles		(Optional) Here you can add (balanced) scorecard perspectives if your organisation makes use of such perspectives or cat to differentiate between the different types of KPIs you want to measure and cluster together.								
	System Settings		Conversard Derepartives Cature								
	Performance Periods				l	Scorecura reisp	ccuves setup				
	Auto Emaile Corporate Information										
	Pulk Emple				((Optional) Here you can add any information you want to convey to your employees, such as your Corporate Strategic Busines Plan. When released, it will show as a link 'Corporate Information' at the top of the Goal Manager page in the roles as selected					
	DUK Elilais			_	ł	below.					
	Goal Mgt Settings					Corporate Inforr	mation: <u>Edit</u> <u>V</u>	View			
	L&D Library										
						Allow visibility by	r: 🔍 None 🔍 M	Managers 👻 Managers & Staff			



System Admin>>L&D Library Settings

The L&D Library is the place where you can add all the formal learning/training and development (L&D) activities and interventions that you organization offers to your employees, i.e. all INTERNAL and EXTERNAL courses, seminars, workshops, conferences, etc.

If enabled for your organization the System Admin L & D Library Settings will be viewable. Please also refer to the Learning & Development System Section of this Guide for more information.

Ilibrary Setup Ig and Development Categories		Learning and D	evelopment	Library	
Ig and Development Categories	Setup				
Filter Discontinued Items: © Exclude Include Apply Filter Clear Filter Compatibility Compatibility Compatibility Clear Filter Compatibility Clear Filter	d Developme	ment Categories			
Filter Discontinued Items:					I
Competencies (use CTPL Key):	Filter	Discontinued Items:	Exclude OInclude	Apply Filter Clear Filter	
L&D Item: All L&D Items Provider: All Providers Competencies (use CTAL Rey).	L&D Item: A	n: All L&D Items Provider:	All Providers	Competencies (use CTRL Key):	
No/ID: All Item No/IDs V Target Group; All Target Groups V Active Listening	No/ID:	All Item No/IDs Varget Group:	All Target Groups	Active Listening	
Business Thinking/Acumen				Business Thinking/Acumen	
Coaching / Mentoring Conflict Management				Coaching / Mentoring Conflict Management	
USERS



Users >> Browse Users

This page contains a list of all the users uploaded into the system. To edit users' details, click on their **User File** links on the far right of the screen. This will open their User Files where you can edit their details.

TalentPeak				
User Management			Welcome	Access privileges: CorpAdmin DivAdmin Appraisor Appra
Home System Admin	Users Goals Appraisals PDPs Prowse Users Create New User Buk-Manage Users	Reports Tutorials Set • All Users • Perf Cycle 1: Annually •	Perf Cycle 2: Annually	l Sign (
	In port Users Browse 360 External Raters Create New 360 External Rater Import 360 External Raters	Filter Advanced filter options Last Name A B C D E F G H I I K L M N Q I Advanced Filter Name Name enter Ist few letters of first/isst name Include Inactive I blocked Unit Al, or clock to select	2 Q R S I U V W X Y Z Apply Advanced Filter Clear Filter 3 Job Tille A, or clck to select Location AI, or clck to select	"Apply Filter" Means to "Search" "Clear Filter" removes current search parameters to Spreadsheet
Users		Filter By Unit in the drop down	and select "APPLY ADVANCED FILTER"	Create New User Export to Spreads
8 results returned	To be whate	11-5	to and an annual second s	A second fields and block and second second
Name Andrews, Paul	Call Center Operator	HQ->Sales->Call Center	Charlotte Rawlings, Rita	Access (other than appraisee)
Barnes, Wayne Billings, Barb	Call Center Operator Call Center Operator	HQ->Sales->Call Center HQ->Sales->Call Center	Charlotte Rawlings, Rita Charlotte Rawlings, Rita	useradmin User UserFile Settings User

Clicking on user names on the left of the page opens non-editable "pop-up" User Files. To edit the individual's User File, click on the "Red" User name on the far right. Clicking on column headings sorts the items below in alternating ascending and descending lists (alphabetically and numerically). Use the filter at the top of the page to affect various search combinations.



Users >> Create New User

All employees in the organisation need to be loaded as users to enable their appraisals being done on the system, and their records being kept in the database (whether some worker-level employees may have access to PC or not).

The "Create New User" page is self-explanatory, except for the following fields that may need some additional clarification:

Login ID: We strongly recommend that you use an employee's work **email** address here (and that they keep it that way).

Password: You can leave the Password field empty. When you "Save/Update" the User File, the system will automatically generate a randomly-selected eight-letter password, which will be "hashed" in the User File (appearing as four stars, for security purposes). (Refer to User File Details in Knowledgebase) (Refer to APPRAISEE GUIDE)

Ă,									
TalantD									
TalentP	eak								
User Adı	min	\frown							
Home	System Admin	Users	Goals	Appraisals	PDPs	Reports	Tutorials		
		\smile				-			
					С	reate Nev	v User		
					pl	ance enter the	details of the new	u ucor	bolow
					F P	ease enter the	details of the new	v user	Delow
					U	ser Photo	Upload a new	image.	••
								Bro	Save
					P	ersonal Infor	mation		
					Fi	rst Name			
					La	ast Name			
					Lo	ogin ID			
					Pa	assword			
					C	ompany Info	rmation		
					Jo	b Title	Please Select		•
					E	mployee No			
					S	tart Date		d	d mm yy
					v	/ork Phone			
					C	ellphone			
					w	/ork Fax			
					E	mail			
					PO	ostal Address		~	
					D	hysical Address		· ·	
					(v	vork)			
								-	
					Lo	ocation	Please Select		•
					A	ppraisor	Please Select		•
					Hi	igher Lvl Mgr	Please Select		No HLM
					Pe	erform Cycle	C1: Annualy		•
						nit			
					C	urrent Unit			
							Add/Edit Unit		
					S	ystem Access	s Privileges		
					A	ppraisor			
					Di	ivAdmin			
					C	orpAdmin			
					s	tatus			
					A	ctive	v		
							UN-tick when user h release User Licens	as left o e)	rganisation (this will
					В	locked			
							Tick when user not access to a compute	allowed t er	to logon, or if user has no
									Update
									<u> </u>

Users >> System Access Privileges

- Appraisor: Tick this box if a user has staff members to appraise (normally all managers and supervisors with employees reporting to them).
- > CorpAdmin: <u>See System Roles.</u>
- DivAdmin: <u>See System Roles</u>.
- > UserAdmin: See System Roles & See UserAdmin Setup

A specific DivAdmin can be assigned to any number of top- or lower-level units in Unit Administration (System Admin >> Units). Click "edit" next to the relevant unit or sub-unit, and select a DivAdmin from the dropdown list (it is even possible to select a second DivAdmin for the same unit). When saved, this person's name will show in the organisation structure on the UNITS page.

NOTE: It is not compulsory to assign DivAdmins for your organisation, as the CorpAdmin will still be able to view the User Files and appraisal records of all employees.

Users >> Editing User Files

Editing capability capabilities are based on one's role in the system. Obviously the higher one's privilege level such as CorpAdmin, System admin and Div.Admin the greater their editing powers. Set out below is a cascaded overview of the editorial powers based on one's highest privilege level in the system, starting at:

- CorpAdmin & System Admin & DivAdmin, then
- Manager/Appraisor then
- > Appraisee level.

CorpAdmin/System Admin/DivAdmin

- Corp.Admins can edit any and all fields in all user files
- System Admin can edit any and all fields in all user files
- · Div.Admin can edit all fields in only those users within their Division or Business Units

It is important to note that each can edit all fields in the user file including the privilege level and status of a user. Appraisors cannot edit System Access Privileges or Status.

System Acces Appraisor	ss Privileges
DivAdmin	
CorpAdmin	
Status	
Active	UN-tick when user has left organisation (this will release User License)
Blocked	
	Tick when user not allowed to logon, or if user has
	no access to a computer Delete Undate

User Files & Passwords - Editing Rights & Permissions

CorpAdmins, System Admins, Div.Admins Role - can edit all of the fields below including the user's password. Security is ensured by allowing the user to log in at any time and change his or her password. Editable fields have "boxes around them".

View #1 – Password is editable in CorpAdmin, System Admin & DivAdmin

First Name	Rita	
Last Name	Rawlings	
Login ID	rita	
Password	****	
Job Title	Call Center Supervisor	
Employee No	Car Center Supervisor	
Start Date	6 Jun 1984	dd mm yy
Work Phone		Jug milli yy
Cellphone		_
Work Fax		
Email	its Object and some	
Postal Address	rita@talent-peak.com	*
(work)		
		-
Physical Address (work)		*
		Ŧ
Location	Charlotte	•
Appraisor	Hiller, Ron	-
Higher Lvl Mgr	Please Select	💌 🗖 No HL
Perform Cycle	C1: Annually	-
Unit		
Current Unit	HQ->Sales	
	Add/Edit Unit	

Appraisor Role

The appraisor can edit all the user file fields of their direct reports with the exception of the user's log in ID, their user password, privilege level, and status; they are not editable fields.

View # 2 - Login ID & Password are NOT editable within the Appraisor Role access to User file

Personal Inform	nation		
First Name	Rita		
Last Name	Rawlings		
Login ID	****	-	
Password	****	_	
Company Infor	mation		
Job Title	Call Center Supervisor		-
Employee No			
Start Date	6 Jun 1984	_	dd mm yy
Work Phone			
Cellphone			
Work Fax			
Email	rita@talent-peak.com		
Postal Address (work)		*	
		-	
Physical Address		*	
(work)			
		Ŧ	
Location	Charlotte		-
Appraisor	Hiller, Ron		•
Higher Lvl Mgr	Please Select		💌 🗖 No HLM
Perform Cycle	C1: Annually		-
Unit Current Unit	HQ->Sales		

Appraisor Role

The appraisor can edit all the user file fields of their direct reports with the exception of the user's log in ID, their user password, privilege level, and status; they are not editable fields.

Appraisee Role

TalentPeak User Admin Home Goals Appraisals My User File PDPs	
Ť	Rita Rawlings
In the <u>APPRAISEE</u> ROLE (Yellow Highighted Role) - My User File is accessible & can change their Login ID & Password	Please edit the details below then press Update Personal Information First Name Rita Last Name Rawlings Login ID Password *****
	Company Information Job Title Call Center Supervisor Employee No Start Date 6 Jun 1984 Work Phone Cellphone Work Fax
	Email rita@talent-peak.com Postal Address (work) Physical Address (work) Location Charlotte Appraisor Hiller, Ron Higher Lvl Mgr Please Select No HLM Perform Cycle C1: Annually
	Unit Current Unit HQ->Sales Add/Edit Unit

As an **Appraisee**, **if** the self-service feature **is turned on** in System Settings; gives users the ability to update their own contact information – login ID, email, phone, physical address only. **Users can always edit their password** whether the self-service feature is turned on or not. If the self service is not turned on, appraisees can edit their login ID and password only.



Import Users

Browse 360 External Raters Create New 360 External Rater

Import 360 External Raters

Users >> Bulk-Manage Users

Through the functionality on this page you can change the User File selections of users in bulk to reflect a new (same) Appraisor, Higher Level Manager (if activated), Job Title, Location, Unit, and/or Performance Cycle (if you use a second cycle). In other words: move selected users in bulk to new units, locations, appraisors, etc. The Bulk-Manage feature also provides the ability whereby multiple users can be deleted or de-activated at the same time.

View 1

TalentP	eak										
Bulk-Ma	nage Users									Wel	come
Home	System Admin		Goals	Appraisals	PDPs	Reports	Tutorials				
		Browse U Create Na Buk-Man Import U Browse 3 Create Na Import 30	sers aw User age Users sers 60 External Ra aw 360 External 60 External Ra	aters al Rater iters	A LC Na	All Users dvanced Filte dvanced Filte ocation A ame er nit P	Perf Cycle 1: An er I locations hter 1st few letters of ease Select	nually Perf Cycle 2:	Annually Appraisor HLM Job Title	Apply Filter Al Appraisors Al Higher Level Managers Al, or dick to select	Clear Filter
					Th ne yc St	nrough the fu ew (same) Ap ou use a seco t ep 1: Using	nctionality on th praisor, Higher L nd cycle). You ca the filter above,	is page you can chang evel Manager (if activa in also delete or de-a please select the user	ge the User Fil ated), Location ctivate multiple 's whose user	e selections of users in b n, Unit, and/or Performan e user files in bulk. records you want to chai	ulk to reflect a ce Cycle (if nge.

View 2

e	System	n Admin	Users Goals	Appraisa	ls Rej	oorts	Tutorials						1	Si
			Browse Users											
			Create New User											
			Bulk-Manage Users	Advanced F	ilter					Appl	y Filter Clear Filter	i i		
			Import Users	Location	All location	s	<u>•</u>	Арр	oraisor	All Appraisors	<u>•</u>	l		
				Name	enter 1st fe	w letters of f	first/last name	Job	Title	All, or click to s	elect 💌	1		
	Unit Marketing 🔽													
														- 1
Т	he user re	cords of the	following users are ab	out to be cha	anged, dele	eted, or de-	activated. Please	review	the list	below and rem	iove any unwanted use	rs.		
11	No		User	Job	Fitle		Appraisor		L	ocation	u	Init	Remove	
11	1	Geon, Gary		Sales Rep		Smith, Ber	n		Sydney		Marketing	Remove	i I	
	2	Green, Dan	ny	Marketing M	anager	Hanko, To	m		New Yo	rk	Marketing	Remove	i I	
	3	Jones, Terry	Y	HR Officer		Smith, Ber	n		London		Marketing		Remove	i I
	3 Jones, Teny HR Officer Smith, Ben London Marketing Remove @ Change Selected User Records Delete Selected Users De-activate Selected Users Remove Entire List Co To Step 2 @ Change Selected User Records Delete Selected Users De-activate Selected Users Step 2: Select the user record items to change equally for all selected users . You may select one or more items in the drop-down fields below. .													



Users >> Import Users

This utility allows you to bulk-import all your User Files into the system. To do so, export all your employee details from your HRIS/Payroll System into the Excel Spreadsheet User Import Template (provided by us). This populated spreadsheet can then be imported into the system, creating User Files for all your employees in one go (as well as, simultaneously, import all your Job Titles and Locations into their respective system pages). <u>Please Request the IMPORT TEMPLATE</u> if you haven't already received this. We will approve it and upload it for you.

Follow the detailed instructions provided on this page (Import Users). Also make sure the **Start Dates** (if being added) **are all 100%** accurate as per the examples provided.

TalentPeak	FalentPeak													
Import Users		Access privileges: Corp	DivAdmin DivAdmin											
Home System	n Admin	Users	Goals	Appraisals	PDPs	Reports	Tutorials							
		BrowseUs	ers											
Import Users,	Locati	Create Ne Buk-Mana	w User ige Users											
System Admin	nietrate	Im port Us	Im port Users							Upload Excel / CSV File				
System Aum	instrate-	Browse 360 External Raters							Connector Type: Excel / CSV					
General		Create Ne	Create New 360 External Rater						File:	Browse				
With this functionality you can b Import 360 External Raters ee records into the system, limited only by your allocated number of User Licenses (as purchased by your organization).										Import Type: Excel Import 🔻				
It is intended to ease to update existing real	t is intended to ease bulk data loading by CorpAdmins; but does not obviate the need for Corp- and DivAdmins to manually maintain/update individual User Files (i.e. it cannot be used o update existing records).													
Add new employee re	cords in the	same way	(e.g. month	hly/quarterly). I	ndividual em	ployee records	can be upload	via the Create New User page.						



System Administration Home System Admin Users Goals Appraisals Browse Users Create New User Buk-Manage Users Import Users Import Users Import Users Encode Statemal Raters Create New 360 External Rater Import 360 External Raters Import 360 External Raters Import 360 External Raters

Users >> Browse 360 External Raters

If Compass360[™] is activated, you will be able to filter and view your **External Users** or External Raters (users outside of the organization) profiles under this section.

Please refer to **Compass360™** <u>Section</u> of this guide for complete information.

TalentPeak			
External Rater Management		Welcome	Access privileges: CorpAdmin DivAdmin Appraisor Appra
Home System Admin Users Goals Appraisals	PDPs Reports Tutorials		Sign
	Filter A Last Name A Advanced Fiter Sc Name en Include	vanced filter options vanced filter options play all inactive users in the system arch your users by the first letter of their last name er 1st few lettes of fist/last name last last play all inactive	Apply Filter or Clear Filter
360 External Raters	Select Criteria to filter on		Create New External Rater Export to Spreads
Please apply a filter above to view users			
Company	Name Job Title	Email Address	



TalentP	eak											
External	360 Rater Admi	n										
Home	System Admin	Users	Goals	Appraisals	PDPs	Reports	Tutorials					
		1				Create Ne	w Externa	al Rater				
						Please enter the	details of the	new external rate	r below			
						User Photo	Upload a ne	Browse	Save			
			Compass	360'**		Personal Information						
			USERS>:	>Create New		First Name						
						Last Name						
		Activ	vate or			Company Info Company Name Job Title Work Phone	ormation					
		Dea(360 E Us	ctivate xternal sers			Status Active			Update			



 System Administration
 Users
 Goals
 Appraisals

 Home
 System Admin
 Users
 Goals
 Appraisals

 BrowseUsers
 Create New User
 Environment Users
 Import Users

 Browse 360 External Raters
 Create New 360 External Raters
 Create New 360 External Raters

Users >> Import 360 External Raters

External 360 Raters can also be added into the system via the import/upload template.

Please refer to Compass360™ Section of this guide for complete information

TalentP	eak										
Import 3	60 External Rat	ers						Welcome	Access privileges:	orpAdmin) DivAdmin	
Home	System Admin	Users	Goals	Appraisals	PDPs	Reports	Tutorials				
		1									
Import	360 External	Raters									
System Administrator Notes With this functionality you can bulk import an unlimited number of external rater records into the system. External raters are everybody external to the organisation that you want to involve as raters for internal staff, e.g. customers, suppliers, government agencies, students, etc.									Upload Excel / CSV File Connector Type: Excel / CSV File: Browse		
Individual i	aters can be uploade	d via the 'Cr	eate New 3	60 External Rate	r' page.				Import Data File	2	
Obtain the	360 External Rater I	mport Sprea	idsheet Ten	nplate from your	system ver	ndor. The spre	adsheet headin	gs and columns should not be changed in any way.			
Importin	g Rules										
 Wh The new Ext Wh Wh File It is 	ere a cell in the sprea system compares Fi record - to prevent ernal Rater' page) ere a First and/or Las ere the spreadsheet will be left empty. Yo s possible to add the	idsheet is en rst and Last possible dup st Name doe does not con u will need t same person	npty, it will I Names in th olication (wh s not appea ntain a rater o add the E n in both th	eave the corresp he spreadsheet v here you have tw ir in the spreadsl r Email Address, mail Address ma e internal user di	onding field with all exist o raters with neet, the re a system with nually later atabase an	d in the rater U ting external ra th exactly the s ecord will not u varning will indi d the external	Iser File empty ater records in same first and I pload (a syster cate this fact. T rater database	(see exception below r.e. first and last names) the system, and where an exact match is found, it will not upload the ast names, load the second person manually via the 'Create New 360 n warning will indicate this) fire rater record will still upload, but the corresponding field in the User (useful for a 360 bureau service).			
Tip: Keep	the Excel Import Spr Then complete the in	eadsheet op	en and mak	e changes to it a	is indicated	by the system	n import warnin	gs (see KEY bottom of import page), until all errors have been			

GOALS



Goal Manager Dashboard

The **Summit Goal Management**TM (**GM**) system is an **add-on** module to the core TalentPeakTM (regular performance appraisals) System <u>or</u> can be set up as a standalone system. If it is activated, you will see the "GOALS" in the navigation.

Please see the TalentPeak Summit Goal Management™ Section in this CorpAdmin Guide or for additional information.

Goal Manager Settings



APPRAISALS



Appraisals>>Appraisal Manager

On the Appraisal Manager page you can view and monitor the status of the appraisals of **all employees** from the **CorpAdmin** view. From the **DivAdmin** or **Appraisor Role**, you can view only your direct reports (Appraisees), as well as "indirect" reports if you have further units "under you" (click the UNIT dropdown list in the filter to see the lower-level units). The Appraisal that you have created last will always show at the bottom of the list of appraisals on this page.

X*														
TalentPe	eak													
Appraisa	I Manager										Welcome	Access privile	ges: CorpAdmin DivA	dmin Appraisor Appraisee
Home	System Admin	Users	Goals		PDPs	Reports	Tutorials							Sign Out
	Filter De Views to Apprais Status	esired Reflect als & ses	_	Appraisal Mana Create New Ap Buk-Create Ap 360 Appraisal N Create New 36 Buk-Manage 3 Template Mana	ger praisal praisals 4anager 0 Appraisal 60 Appraisals ager Unit App	Perf Cycle 1 r Period 1 J Period 1 J t HQ	: Annually Pe gular Appraisals praisees with Appra an 2011 - 31 Dec 2 Locations I-> Sales Name	erf Cycle 2: Annually aisals 2011 (current)	Appraisor Job Title Appraisee	Al Appraisors Al Job Titles enter 1st few lette	y Filter Clear Filter			
Apprais	als	S	elect All 🖸	elete All Selected	<u>A B</u>	CDEFGH	the Default Rat	2 Q R S T U V W X Y ting Key to all Appra	<u>Z</u> Isals on this j	oage, <u>click here</u>	-		Multirater Quick Statu:	s Export to Spreadsheet
3 results ret Appraisee Appraisor Higher Mar	turned		<u>Job T</u>	itle		Appra	aisal Date	Signoff				This Peric	d <u>Yr Cum Avg</u>	Form Links
Appraisee: <u>/</u> Appraisor: <u>F</u> Higher Mgr:	Andrews, Paul Rawlings, Rita Clicking on Names will enable access to view User File Data		Call C	enter Operator		30 De	ec 2011	Appraisee: 9 Appraisor: 9 Higher Mgr: N	Jul 2012 Jul 2012 (Rit: Iot yet	a Rawlings)		117%	117% ACCESS to FORMS VIA LINKS	Job Description Agreement Perf Record Appraisee Prep Appraisal Summary / POP MULTIRATERS PDP Undo Sign Off Delete
Appraisee: <u>E</u> Appraisor: <u>B</u> Higher Mgr:	Barnes, Wayne Bawlings, Rita None Assigned		Call C	enter Operator		31 De	ec 2011	Appraisee: 8 Appraisor: 8 Higher Mgr: N	Jan 2012 Jan 2012 (Ro Jot yet	on Hiller)		122%	122%	Job Description Agreement Perf Record Appraised Summary / POP Undo Sign Off Delete
Appraisee: E Appraisor: E Higher Mgr:	Billings, Barb Rawlings, Rita None Assigned		Call C	enter Operator		31 De	ec 2011	Appraisee: 1 Appraisor: 1 Higher Mgr: N	Mar 2012 Mar 2012 (Ri lot yet	ta Rawlings)		100%	100%	Job Description Agreement Perf Record <mark>Appraisee Prep</mark> Appraisal

The Appraisal Manager page is also a "portal" for gaining access to the following online forms of each Appraisee (see links on far right):

Job Description
Agreement
Perf Record
Appraisor Prep
Appraisal
Summary / POP
Delete

- Job Description (if this feature is activated): Shows view/print version of Job Description.
- Agreement: Opens the Performance Agreement, e.g. to edit.
- **Perf Record:** To upload Performance Record Notes of good or poor Appraisee work performance or behaviour throughout the performance period.

• **Appraisor Prep:** Takes you to the Appraisor Preparation (Draft) Form. The Appraisor's PREP form <u>cannot</u> be viewed by the Appraisee, or anybody else for that matter – unless the feature to allow its release is activated in System Settings (Appraisees have their own PREP Form, also

called "Self-Appraisal").

Appraisal: Takes you to the Official Appraisal Form of the Appraisee (to be completed after the appraisal interview). The contents of the Appraisor PREP Form can be transferred into this form (individual measures, or the entire PREP Form contents in one go - see transfer links on the PREP Form).
 NOTE: The Official Appraisal Form cannot be viewed by the Appraisee from his/her login until such time as the Appraisor - and Higher Level Manager (HLM) if activated - signs off on the Appraisal (the HLM can e.g. be the Appraisor's boss or the Corp- or DivAdmin)

- Summary/POP: Contains the Performance Percentage Calculations (or rating averages), Performance Optimisation Plans, and signoff links. NOTE: The Summary/POP Form also <u>cannot</u> be viewed by the Appraisee from his/her login until such time as the Appraisor (and HLM if activated) signs off on the Appraisal.
- Delete: Deletes an appraisal that has not been signed off yet.

Also Refer to Definitions Section

Additional Appraisal Manager Views for Appraisors

To View, click the "Appraisor" role-link (this link will now be highlighted yellow).

There are **2** areas in which you can view your "Appraisees". The default page will be your Appraisor home page "My Team's Appraisals", or dashboard view. On this page the names of your direct reports ("subordinates") will appear in the dashboard, also showing the status of their appraisals. The other location is found by clicking on Appraisals, then select Appraisal Manager.

See screenshots below: Dashboard View



Appraisor Role>>Appraisals>>Appraisal Manager View

NOTE: The Appraisor home page dashboard is another easy way to view the status of employee appraisals, and to access their various appraisal forms via the links in the hover pop-up that shows when putting your cursor over an Appraisee's name:





Higher Level Manager Views for Appraisors in Appraisal Manager

To View, click the "Appraisor" role-link (this link will now be highlighted yellow).



In their Appraisor role, managers will now have a further page in the menu bar dropdown list, called **Higher LvI Mgr Signoff**.

(See next section regarding Higher Level Manager Signoff. Please note this is not viewable unless you are in the **Appraisor Role**. This information is also included in the TalentPeak[™] Appraisor User Guide)

All Appraisal Manager pages in the system will also show the HLM as in the screenshot snippet below.

Appraisals>>Higher Level Manager Signoff (Appraisor Role)

TalentP	eak														
Appraiso	or Home								Welcome		A	ccess pri	vileges: <u>CorpAdmir</u>	DivAdmin (Apprais
Home	Users	Goals		PDPs	Reports										1
My Tea All appraisa	am's Ap als for the c	praisals urrent perio	Appraisal Manag Higher L vl Mgr Create New Ap Bulk -Manage M	ger Signoff praisal R. Appraisals	28 Jun 2012.										
View the Appraisal Manager Page (nager Page (360 Appraisal M 360 Higher Lvl Create New 360 Buk-Manage 30	Manager Mgr Signoff 0 Appraisal 60 Appraisals Select er Create/Edit Agreement	View the High	Perf Cycle 1: Ann Perf Cycle 1: Ann Appraisor Click the desired ac	tion step	Perf C Highe Please sele	Cycle 2: Annually er Level Manager ect • Hold PRAISAL		Complete ppraisal	5)♦(Bign Off		
						R	egular	Apprai	isals						
				Appraisee	Apprais Date	sal Performance Agreement	Appra Con A/sor	sal Prep pleted A/see	Appraisal Completed	Alsor	ummary/ Signed O HLM	POP Off A/see	Current Period Perf Percent		
			Rita Ra	wlings	31 Dec	11 🖌	~		~	*	*	×	100%		
						А	d-Hoc	Apprai	isals						
				Appraisee	Apprais Date	sal Performance Agreement	Appra Com A/sor	sal Prep pleted A/see	Appraisal Completed	Su A/sor	Immary/I Signed O HLM	POP ff A/see	Performance Percentage		

All Appraisal Manager pages in the system will also show the HLM as in the screenshot snippet below.



Appraisor Home Page View

A list of all appraisals that a manager needs to sign off as HLM, shows on the Appraisor home page (select the Higher Level Manager radio button at the top).

	O A	Select HLN	M	• O High	er Level Mana	ger			
Select emp	loyee and clicl	k the desired a	ction ste	ep: Lesley E	Bronco V Le	esley Broker	onco y act	ion ste	ep icons
shboard	Pegular A	Appr	aisal	off as	Higher Le	val M	2020	ər	
Shboard Appraisee	Regular A	Appr Appraisals t Performance Agreement	o sign Apprais Comp	off as	Higher Le	svel Ma	anag mmary/ Signed O	er POP ff	Current Period Perf Percent
Shboard Appraisee	Regular A Appraisal Date	Appr Appraisals t Performance Agreement	o sign Apprais Comp A/sor	off as sal Prep bleted A/see	Higher Le	evel Ma	anago mmary/i Signed O HLM	er POP ff A/see	Current Period Perf Percent
Appraisee sley Bronco	Regular A Appraisal Date 20 Oct 11	Appr ppraisals t Performance Agreement	o sign Apprais Comp A/sor	off as sal Prep oleted A/see	Higher Le	evel Ma Su Su A/sor ✓	anago mmary/ Signed O HLM X	er POP ff A/see ✓	Current Period Perf Percent 108%

The Summary/POP Form will now also show a general comments field and signoff link for the HLM.

NOTE: With a specific HLM assigned to an Appraisee, only this HLM will have access to this field and signoff link. When the "No HLM" box is ticked in a User File, this HLM comments field will not show.

Higher Level Manager Frequently Asked Questions (FAQ) –Signing Off a 3 Level

Question: How do I sign off as Higher Level Manager (HLM) in a system that has been set up with 3-level signoff?

(a) When you are specifically assigned as HLM to an employee (in his/her User File)

In your Appraisor role, go to the **Higher LvI Mgr Signoff** page, where you can access the appraisal forms of all those employees you are assigned to as HLM. Click on the **Summary/POP** link (far right of screen) of those employees whose appraisals you want to sign off.

When you are specifically assigned as HLM, nobody but you will be able to access the HLM general comments field and signoff link on a Summary/POP Form.

This general comments and a signoff link will be active only once the employee's Appraisor (normally direct line manager) has signed off.

Once you have signed off, the Appraisee's own general comments field and signoff link will become active (which only they can access).

NOTE: The Appraisee cannot access the Official Appraisal or Summary/POP forms until the HLM has signed off.

(b) With NO specific HLM assigned to an Appraisee

In your Appraisor role, select **Appraisals >> Appraisal Manager**. In the filter, click the UNIT dropdown arrow. This will list all the sub-units under your "jurisdiction". Select the sub-unit of the person whose appraisal you wish to sign off as HLM. His/her appraisal will show in the list of appraisals that come up. Now click on the **Summary/POP** link (far right of screen) of this employee to enter your general comments and sign off electronically.

NOTE: Check with your CorpAdmin what the organization's policy is regarding WHO should sign off as HLM, as TalentPeak allows ANY manager in the "chain of command" above an employee to do so (as can a Corp- or DivAdmin for further flexibility). The system keeps track of who actually signed off by listing his/her name along with the signoff date on the Summary/POP Form, as well as on the Appraisal Manager page.

(c) Corp- or DivAdmin signoff as HLM

By NOT assigning a specific HLM to employees (in their User Files), system administrators can also fulfill this role. Go to **Appraisals >> Appraisal Manager** to access the **Summary/POP** links of employees.

Question: What is the 3-level signoff sequence?

The signoff sequence is: (1) Appraisor (2) HLM (3) Appraisee

It is important to have the Appraisee signing off last, as that then "locks" the appraisal so that the Appraisor and HLM (Higher Level Manager) cannot go back and change the contents of the appraisal and their final comments afterwards - with the appraisee potentially unaware of this.

This sequence is the only one that guarantees the Appraisee's protection and peace of mind that nothing can be changed after their signoff. Even if an Administrator should UNDO all the signoffs, the Appraisee has to sign off (last) again

NOTE: The Appraisee cannot access the Official Appraisal or Summary/POP forms until the HLM has signed off.

Question: How should 3-level signoffs be handled with appraisal disputes?

Disputes should be handled first, before the Appraisee (and Appraisor for that matter) signs off.

Disputes will generally come up DURING the appraisal interview, even before the Appraisor signs off. In other words, an Appraisee will/should NOT see the area of disagreement the first time when logging on AFTER the Appraisor has signed off.

So the best-practice sequence is:

- 1. Area of dispute identified during appraisal interview (Appraisor and Appraisee cannot resolve).
- 2. Higher Level Manager (HLM) or HR is brought in to mediate/facilitate (or make) final decision.
- 3. Appraisor enters result of appraisal on Appraisal and Summary/POP Forms, enters overall comments, and signs off.
- 4. HLM/HR enters notes re disagreement and solution on Summary/POP Form (if necessary for record purposes), and signs off.
- 5. Appraisee views contents of the Appraisal Form as well as the comments entered by the Appraisor and HLM onto the Summary/POP Form.
- 6. Appraisee enters own final comments and signs off. This "locks" the Appraisal and Summary/POP Forms so the Appraisor and HLM cannot make any further changes to it.

This sequence is the only one that guarantees the Appraisee's protection and peace of mind that nothing can be changed after his/her signoff. Even if an Administrator should UNDO all the signoffs, the Appraisee has to sign off (last) again.

Question: What should be done if the Appraisee refuses to sign off the appraisal?

You should obviously try to first resolve any differences in opinion as explained previously. However, should that fail, and you persist in your view regarding the performance of the Appraisee, we recommend you note this accordingly in the Summary/POP Form (i.e. what you did to resolve the issue, but that the Appraisee still refuses to sign the appraisal off). The system does not FORCE an Appraisee signoff.



Automated Email Samples

Email sent to HLM on Appraisor Signoff

Dear Tom Hanko

The Appraisor, Ben Smith, has now signed off the appraisal of the Appraisee, Jan Bell.

You are the assigned Higher Level Manager (HLM) for this Appraisal, and it is now ready for your review and signoff.

Please log onto the performance appraisal system and follow these steps:

(1) Click on your 'Appraisor' role-link top right of the screen

(2) Go to Appraisals >> Higher Lvl Mgr Signoff

(3) Find the name of the Appraisee (mentioned above) to access his/her appraisal links on the far right

(4) Click the 'Summary/POP' link to view the final comments made by the Appraisor. Then enter your own general comments as Higher Level Manager, and sign the appraisal off.

Your purpose as HLM is to approve the Appraisal as completed by the Appraisor, so please discuss anything you need clarified or changed with him/her first before signing the appraisal off.

NOTE: This is a system-generated email, so please do not reply to it. Contact your Appraisor if you have any questions (also if this email was sent to you in error, and you were not the intended recipient).

Automated email sent to Appraisee on HLM Signoff

Dear Jan Bell

Your manager/supervisor (Appraisor) has now signed off your Performance Appraisal, and it is now ready for your review and sign-off.

Please log onto the performance appraisal system and review the results of your appraisal as entered by your Appraisor.

Follow these steps:

(1) Go to Appraisal >> Appraisal Manager, and click on the 'Appraisal' link to review what your Appraisor has entered onto your Official Appraisal Form (as discussed during the Appraisal Interview). If necessary, ask him/her about anything you believe that does not accurately reflect what you have discussed during the interview (and may need to change). (2) Next, click on the 'Summary/POP' link to view the final appraisal results, and comments made by your Appraisor. Then enter your own general comments, and sign off on the appraisal.

NOTE: This is a system-generated email, so please do not reply to it. Contact your Appraisor if you have any questions (also if this email was sent to you in error, and you were not the intended recipient).



Appraisals>>Create New Appraisal

CorpAdmin Organizational View - Create Appraisal link

Please see the TalentPeak™ Appraisor User Guide for other views and information; also refer to the Tutorial step by step Section in this Guide.





Home

Appraisal Admin



Appraisals>>Bulk Create Appraisals

CorpAdmin Organizational View - Bulk Create Appraisals link Through the functionality on this page you can create appraisals for all employees in selected units, or your entire organization, at the same time with one mouse click.

TalentPeak								
Create Bulk Appraisals							Welcome	ccess privileges: CorpAdm
Home System Admin	Users	Goals	Appraisals	PDPs	Reports	Tutorials		
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			ACMENT					

Please see the **TalentPeak™ Appraisor User Guide** for other views and information; also refer to the Tutorial step by step <u>Section</u> in this Guide.



Home

Bulk-Manage Multirater Appraisals

System Admin	Users	Goals	Appraisals	PDPs	
			Appraisal Manag Create New App Buk-Create App Buk-Manage Mi	ger praisal praisals R Appraisals	
			360 Appraisal M Create New 360 Bulk-Manage 36	lanager D Appraisal 50 Appraisals	
			Template Mana	ger I	

Appraisals>>Bulk Create Multirater Appraisal

Please refer to the Multirater Section in this Guide.



Appraisals>>360 Appraisal Manager

CorpAdmin View of all of the organizations' 360's with the ability to filter views, export data and access form links. (Similar to Appraisal Manager, but only contains 360 information)



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Appraisa	al Admin				
Home	System Admin	Users	Goals	Appraisals	PDPs
				Appraisal Manaç]er
				Create New App	oraisal
				Buk-Create App	oraisals
				360 Appraisal M	lanager
				Create New 360) Appraisal
				Buk-Manage 36	0 Appraisals
				Tem plate Mana	ger 🕨

Appraisals>>Bulk Manage 360 Appraisals

Send out email invitations in bulk; schedule auto-reminders or one time reminders.

Reference the Compass360^m <u>Section</u> of this Guide for detailed information.





Appraisals>>Template Manager>>Template Database

The system has four sub-databases/libraries:

- Appraisal Templates (Template Database)
- Competency Library
- Rating Key Library
- Job Description Template Library

Appraisal Template Database

The ability to create Appraisal Templates in the system for the various roles/positions in your organisation solves the ageold problem of employees with the same Job Title and job contents getting quite different Performance Measures and Standards to perform to, due to them having different line managers and/or being at different locations. The answer is to have a generic Appraisal Template drawn up by job content experts (JCE's) for each distinctly different role/position (Job Title) in the organisation, and to then make these templates available in a database from where they can be downloaded by line managers for their direct reports, irrespective of where they are located (even internationally). This prevents the reinvention of the wheel everywhere. It also ensures the standardisation of work expectations for the same role where relevant, and a consequently much fairer performance management system.

Once downloaded for specific employees, such Appraisal Templates can still be adapted to suit specific local conditions and employee-specific position requirements and targets - so they need not be inflexible or fully prescriptive. However, System Administrators have the ability to "lock" entire templates (or individual measures) so that they cannot be edited once downloaded by line managers (Appraisors) for specific employees (so as to ensure that exactly the same measures and standards are used throughout the organisation for the same role).

JCE's are typically exemplary performers in these roles, their line managers, and HR staff (developing such templates in task forces of 2 to 5 members). The process of developing Appraisal Templates is similar to doing a Job Analysis when developing Job/Role Descriptions and Person Specifications, and should ideally be developed during the same Job Analysis session. Alternatively, use existing Job Descriptions and Person Specifications as primary sources for deriving relevant Performance Measures to include in Appraisal Templates.

It is recommended that Appraisal Templates be reviewed at least annually.

NOTE: Appraisal Templates for all roles are not compulsory. Performance Agreements can be created for employees from scratch, without the use of Appraisal Templates (e.g. Appraisal Templates for Senior Management may not be appropriate).



Appraisals>>Template Manager>>Competency Library

Import Generic Competencies

Add your competencies into this library, or ask us to import our set of around 80 generic competencies, which you can edit as you please (or ask us for the WORD list first). These competencies can be downloaded into Job Descriptions, Performance Agreements or Appraisal Templates. (<u>Refer to Competency Library in</u> <u>Knowledgebase</u>)



Competency Library Categories (Optional use)

An option available is to elect to create "Categories for Competencies" that will permit you to "bucket or group" competencies for an easier method to add to Appraisal Templates. If Categories are not created, the competencies would be added one by one. To use the "Category title" option, you would want to consider creating "broader" category titles that would be the same for a "Job Family Group". For example, on your "Manager Appraisal Template" with all management employees having the same competencies; you would create a Category Title for "Management Competencies" and then associate all of those competencies into one group or category.

Competency Library		Go to Template Manager
Load your organisation's Compe Competency'), or by using the I your system vendor). Please no name as that on the spreadsheet ones on the spreadsheet will be Spreadsheet after you have creat overwritten and relocated to the	tencies into this Library, either one at a pulk import utility below (Import Spread te that existing Competencies in the Lib et, will be overwritten (Behavioural Indi added to the Library. WARNING: Do no ated Competency Categories, as matching NO CATEGORY ASSIGNED section.	a time (click 'Add New dsheet Template provided by prary, with exactly the same cators included), and additional bt (re-) import the Competency ng Competencies will be
File: B	rowse Manage C	<u>competency Categories (optional)</u>
<u>import bata rito</u>	See next screensho	ot below
82 items listed		Add New Competency
All Categories Fi	ter Categories Filter	
No Category Management Competencies		
Technician Competencies		Edit Delete
 Works with a high leve Performs duties with e Is careful to double-ch 	I of precision and attention to detail. xactness and holds self to rigorous stan eck work and avoid errors and mistakes	idards. 3.
Action Orientation / Achi	evement Drive / Motivation	Edit Delete
 Has tremendous drive. 	enerav and determination to complete	tasks.

When you click the link Manage Competency Categories (optional) the following pop-up shows, where you can add your required Competency Categories:

Competency Categories	
To edit existing items, select the text to be changed, mai Changes' button	ke your changes, then click the 'Save
	Save Changes Add New Category
Management Competencies	×
Staff Competencies	×
Technician Competencies	×
	Close Window

The categories show as red bold headings:

	and a start
Work Standards Rigorously ensures that task deliverables meet quantity and quality standards 	Edit <u>Delete</u>
Demands excellence of self and others.Continually identifies ways of doing things better.	
Management Competencies	
Business Thinking/Acumen	Edit Delete
 Has an excellent understanding of general business and financial concepts and principles. Understands the nature and purpose of the organisation, its mission, vision, business model, goals, values, core competencies, culture, products, customers, and competitive advantage, and demonstrates a passion and commitment to these. Is aware of the competition and their modus operandi. Stays current with the latest technologies, developments and trends in the industry. 	
Coaching / Mentoring	Edit Delete
Makes time to coach employees and help them improve their work performance. Meghanith emotion monoperations require basis to discuss the improvement of the second se	a server a

Assigning Competencies to categories:



TalentPe	eak								
System /	Administration							Welcome	
Home	System Admin	Users	Goals	Appraisals	PDPs	Reports	Tutorials		
					Nai	dd/Edit C me licators	Accountability Holds self and othe Ensures that effect Projects/tasks with	ers accountable for required work output and standards. tive controls and contingency plans are in place. hin area of own accountability are completed on time and within budget.	·
			Highlight selecte category	the d title		mpetency tegory	No Category No Category Administrative Stal Customer Service Management Com Sales Competencie Technician Compe	iff Competencies if Cal Center Competencies petencies es etencies	<u>Cancel</u>

Viewing the Competencies by Categories

View the competencies by category using the "Filter feature". Select the category title, and then click on "Filter". It will bring up all competencies that you have added to that category.

Go to Template Manage
is Library, either one at a time (click 'Add New ty below (Import Spreadsheet Template provided by your ipetencies in the Library, with exactly the same name as ehavioural Indicators included), and additional ones on the NING: Do not (re-) import the Competency Spreadsheet , as matching Competencies will be overwritten and tion.
Manage Competency Categories (optiona "FILTER" by Category title in the dropdown
er Add New Competence
Edit Delete
required work output and standards.

Add New Competency

competency Library	Go to Template Manager
Load your organisation's Comp Competency'), or by using the system vendor). Please note th that on the spreadsheet, will be spreadsheet will be added to th after you have created Competer relocated to the NO CATEGORY	etencies into this Library, either one at a time (click 'Add New bulk import utility below (Import Spreadsheet Template provided by your at existing Competencies in the Library, with exactly the same name as e overwritten (Behavioural Indicators included), and additional ones on the e Library. WARNING: Do not (re-) import the Competency Spreadsheet ency Categories, as matching Competencies will be overwritten and ASSIGNED section.
File: Brow	wse Manage Competency Categories (optional)
File: Brow Import Data File 78 items listed	Manage Competency Categories (optional) Add New Competency





Appraisals>>Template Manager>>Rating Key Library

Rating Key Library

This library contains five standard "non-editable" Rating Keys, which can be downloaded into Performance Agreements and Appraisal Templates. You can also add your own Rating Keys to this library. Please remember that the 3-rating level should always represent the acceptable/expected performance level, i.e. "On Target/Standard", "Meeting Expectations" (representing 100% achievement). If you

want your managers to only use your own uploaded Rating Key, indicate this as follows in the Rating Key Title, e.g.: Apex Healthcare Rating Key. You can also select a Default Rating Key which will automatically download as you create new Performance Measures in Appraisal Templates or Performance Agreements. (<u>Refer to Rating Key Library</u> in Knowledgebase)

TalentPeak		*
System Administration	Welco	me
Home System Admin Users Goals Appraisals	PDPs Reports Tutorials	
	Click here to add a <u>Go to Tem</u> Rating Key Library <u>New rating key</u> <u>Add Ne</u> You have 7 items in your database Generic Rating Key 1 5 Significantly Above Target/Standard (i.e. exceptional) 4 Above Target/Standard 3 On Target/Standard (may include slight deviations plus or minus)	Date Manager ew Rating Key Standard Default @
Select your system's DEFAULT Rating Key	 Below Target/Standard Significantly Below Target/Standard (i.e. unacceptable) Generic Rating Key 2 Consistently Exceeding Expectations - reflects performance that is consistently exceptional on a continuing basis. Frequently Exceeding Expectations - reflects performance that exceeds expectations on an intermittent but frequent basis. Firequently Below Expectations - reflects seady, competent performance (100% level). Frequently Below Expectations - reflects performance that is regularly not meeting established standards. Consistently Below Expectations - reflects performance that is consistently not meeting established standards. 	Standard Default
	 Generic Competency Rating Key Significantly Above Target/Standard. This competency was demonstrated in a way that sets an exceptional good example to others Above Target/Standard. There were some instances where the appraisee clearly demonstrated extra effort and competency beyond the normal call of duty On Target/Standard. The competency was displayed at a fairly high level (as per minimum position requirement) throughout the performance period. One or two instances of less serious under-achievement should still be viewed as deserving of a 3-rating. Rule: Consider (a) the seriousness of the under-achievement, (b) its frequency of occurrence, and (c) the length of the performance period Below Target/Standard. There were some instances of under-achievement that cannot be viewed as small negative deviations from standard Significantly Below Target/Standard. There were some serious and/or many deviations from standard 	Standard Default
	Two-Point Competency Rating Key 5 N/A 4 N/A	Standard Default 🔘



Appraisals>>Template Manager>>Job Role Descriptions

This functionality needs to be specifically **activated in System Settings**. (See Settings <u>Job Descriptions</u>) Performance Measures and Standards (including Competencies) can be transferred from a Job Description to its corresponding Appraisal Template (for perfect alignment between them).



For Step by Step instructions, please go to the chapter on **TalentPeak® JD Builder** <u>Section</u> in this CorpAdmin Guide. To go to your template manager, click the red titled link as shown here. Read the Tutorial on the Job Description Template Manager page for detailed instructions on its use. Also consider asking us to give you on online demonstration on the creation of Job Descriptions in the system; or access our outsourced services to add for you.

(Refer to Job/Role Descriptions in Knowledgebase)



STEP BY STEP TUTORIAL

Creating Appraisal Templates

Let's now get some hands-on practice in creating Appraisal Templates (on the Template Database Page).

Please select a Job Title of one of your direct reports (if you have any). Otherwise, any Job Title will do. Click "Create" next to that Job Title on the far right.

Corporate Template Database						
Competency Library To add or edit Competencies, <u>click here</u>						
Rating Key Library To add or edit Rating Keys, <u>click here</u> To copy the <u>Default Rating Key</u> to one or more Templa	ates below, select the	• Template/s first, the	en <u>click here</u>			
Regular Appraisal Templates						
To go to the Job Description Template Manager <u>click h</u>	ere					
Select All Templates (to copy Default Rating Key to)					Select All Templates T
You have 24/25 templates in your system	Job Descriptions	Template Evicts?	Last Edited	Last Edited By		T-Lock
Accountant	JD - Edit JD - View	Yes	14 Jan 2011	Ben Smith	Edit Template Preview Delete	
Accounting Clerk	JD - Edit JD - View	No	1 Jan 0001	-	Create	
Administration Officer	JD - Edit JD - View	Yes	14 Jan 2011	Ben Smith	Edit Template Preview Delete	
Branch Manager	JD - Edit JD - Xiew	Yes	14 Jan 2011	Ben Smith	Edit Template Previey	

The next view shows (example: Payroll Clerk role):

Template Builder			Welcom	e Ben Smith	Access privileges: CorpAdmin	DivAdmin Appraisor	Appraisee
Home System A	dmin Users	Appraisals	Reports	Tutorials			Sign Out
		Т	emplate fo	r Job Title: P	ayroll Clerk		
			Our Contract	Template OLock	emplate		
				Make changes	to the fields below as needed, then pre	ess the	
	Template Preview	v		Save button at	the bottom of this panel		
	Last Edited	Ben Smith		Notes			
	Created	14 Jan 2011					
	Update Compet	encies				Save	
Performance Measure	25	Perform	ance Measure	e Details			
	Edit Wei	ghtings Please e	dit the Weighting	js			
		Please s	elect a Perform	ance Measure on th	e left, or <u>click here</u> to create a new one	e	
						A.m.A.m.s	

Enter any relevant notes in the Notes field, such as the names of the Task Force members that have developed the measures.

Now click: "Please select a Performance Measure on the left, or click here to create a new one" ("click here")

This will open the following section on the right side of the page. Note that if a Default Rating Key was selected, this will now load automatically. The (3-level) blue border indicates the minimum expected level of performance ("On Target/Standard", or "Meeting Expectations"):

NOTE: If you want **ALL Template measures to be locked**, and not give managers the ability to edit anything in a downloaded Template, or add any additional measures, it is not necessary to lock the individual measures. Just tick the T-Lock tick-box for that Template (see column of T-Lock tick-boxes on the far right-hand side on the Template Manager page). The text of all measures will remain black with the entire Template locked this way.

		Template for J • Unlock Tem	Iob Title: Payroll Clerk mplate OLock Template	Į
	Template Preview Last Edited <u>Ben Smi</u> Created 14 Jan 2 <u>Update Competencies</u>	<u>th</u> 011	Make changes to the fields below as needed, then press the Save button at the bottom of this panel Notes	
Performance Measure	15	Performance Measure D	etails	
	Edit Weightings	Please edit the Weightings		
		Outcome / Goal / Objec	tive / KPI / Competency / Value / Behavioural Indicators if a Competency or Value	Lock this Measure
		Load new Competency from D	Database	Save Cancel
		Rating Key (What perfor	mance or behaviour describes each level?)	
	all and the second s	Consistently Exceeding Expe	ctations - reflects performance that is consistently exceptional on a continuing basis.	

MINI TUTORIAL: What does the term "Performance Measure" mean?

Performance Measures are by definition any of the following:

- Goals (e.g.: "Increase company market share to 35% by year "x")
- Objectives (e.g.: "Implement a new accounting system by "x" date")
- Key Performance Indicators (KPIs) (e.g.: Sales, Customer Satisfaction Index, Net Profit, ROI)
- Competencies (e.g.: Accuracy, Communication, Leadership, Selling Skills)
- Values (e.g.: Customer Service Excellence, Teamwork, Integrity)

You should generally have anything from 3 to 6 Competencies per Job Title/Role, added to Goals, Objectives and/or KPIs for a total of, as a rule of thumb, not more than 15 Performance Measures in all.

Goals, Objectives and Performance Standards should be stated in GENERIC terms in an Appraisal Template (also in Job Descriptions), and then adapted for individual jobholders once downloaded into their Performance Agreements - to cater for specific local conditions and employee-specific role requirements and targets.

Example 1 - KPIs:

GENERIC in Template: "Achieve monthly sales targets as agreed with Sales Manager" SPECIFIC in Agreement: "Achieve an average monthly sales turnover of \$75,000"

Example 2 - Goals/Objectives:

GENERIC in Template:

Replace this item with any number of goals/objectives specific to the jobholder

- Add relevant performance standards per each goal/objective (due dates, quantities, quality, budget allocation, specs, expectations, etc.)
 - Allocate an importance weighting for each goal/objective (Edit Weightings)

SPECIFIC in Agreement:

Goal 1: Complete Project A (add performance standards & weighting)

Goal 2: Complete Project B (add performance standards & weighting)

Goals, Objectives, and KPIs should be TYPED (or COPIED AND PASTED) into the first field top right of the template, while Competencies and Values can be DOWNLOADED from the Competency Library, if they were added there.

What are Performance Standards? Examples are: target dates, numbers/volumes to achieve, dollars to sell, percentages to achieve, quality levels to maintain, etc.

What are Behavioural Indicators? Key observable behaviours that describe a Competency or Value, e.g.: Speaks with authority and conviction (ORAL COMMUNICATION).

Consult the **User FAQs** Knowledgebase on the TalentPeak[™] customer support website for more details on and examples of Goals, Objectives, KPIs, Competencies, and Values.

Adding Measures to the Appraisal Template

So let's proceed with adding measures to the Appraisal Template you have created, by adding an Objective with its relevant Performance Standard/s. These are added into the first two fields by typing or by copying and pasting from e.g. a Word document.

Example:

Performance Measure Details
Please edit the Weightings
Outcome / Goal / Objective / KPI / Competency / Value
Processing of Weekly, Bi-Monthly and Monthly salary/wage runs
Lock this Measure
Performance Standards / Behavioural Indicators if a Competency or Value
Pay slips done on time, accurate and error-free
Load new Competency from Database Save Cancel
Rating Key (What performance or behaviour describes each level?)
Consistently Exceeding Expectations - reflects performance that is consistently exceptional on a continuing basis.

Click "Save" with every measure added.

NOTE:

- The Performance Measures will keep "stacking up" in the box on the left of the page as you add them.
- Use the "UP" and "DOWN" arrows (and other available icons) bottom left of the page if you want to re-arrange the
 order of the measures.
- Performance Measures can also be transferred from Job Descriptions (JD Edit page) to Appraisal Templates.

After you have added all relevant Outcomes, Goals, Objectives and/or KPIs for the role (as explained above), then next, download the relevant Competencies (and/or Values) from the Competency Library.

To do so, click the link: "Please select a Performance Measure on the left, or <u>click here</u> to create a new one" ("<u>click here</u>") again, and then click the button: <u>Load new Competency from Database</u> (find this button below the Performance Standards field – see screenshot below).

n	Performance Standards / Behavioural Indicators if a Competency of Value	1000 - V-V-V-V-V-V-V-V-V-V-V-V-V-V-V-V-V-
	Pay slips done on time, accurate and error-free	
	Load new Competency from Database	Save Cancel
	Rating Key (What performance or behaviour describes each level?)	
	- Consistently Exceeding Expectations - reflects of formance for tis consistently exceeding a continuing basis	n and the

This will open the Competency Library. Select all the relevant Competencies/Values for the role (tick the boxes on the left of such Competencies), then go to the bottom of the page and click the button <u>Download All Selected Competencies</u> to download them into the template. (Individual Competencies can also be downloaded by clicking the link "<u>Load this Competency</u>" on the right.)

ד 🗹 🌪	ime Management
	 Effectively utilises time-keeping tools and diaries. Adept at prioritising tasks and assignments. Keeps to allocated lunch and tea breaks. Arrives on time for team and other meetings. Respects other people's time.
 ۷ ک	Vork Attendance
	 Attends work on a consistent and timely basis with infrequent unplanned absences. Informs line manager when will be absent - as organisational policy dictates.

The template now looks as follows, with all measures showing on the left. Selecting a measure shows its details on the right.

Performance Measures	Performance Measure Details
12 items have ZERO-weightings Edit Weightings	Please edit the Weightings
1. Processing of Weekly, Bi-Monthly and Monthly salary/wage	Outcome / Goal / Objective / KPI / Competency / Value
2. Liaising with Accounts Department 3. Inland Revenue returns and payments	Reporting
4. General Ledger	Lock this Measure
6. Reporting	Performance Standards / Behavioural Indicators if a Competency or Value
7. New employee processing 8. Processing terminations 9. Self Development	Monthly Reports (standard agreed layout followed) to reach HR Manager by 20th of each month Reports include details on serious deviations from set budgets Ad-hor ceports filed as dictated by circumstances
11. Administrative Skill	Lock individual measures if necessary
12. Customer Service (Internal)	M
	Load new Competency from Database Save Cancel
	Rating Key (What performance or behaviour describes each level?)
	Consistently Exceeding Expectations - reflects performance that is consistently exceptional on a continuing basis.
and a section of a section of the second of	5 - and a second and

Individual measures can be locked if you do not want managers to change them once the template is downloaded for their employees (see below).

Performance Measures	Performance Measure Details
12 items have ZERO-weightings Edit Weightings	Please edit the Weightings
1. Processing of Weekly, Bi-Monthly and Monthly salary/wage	Outcome / Goal / Objective / KPI / Competency / Value
2. Liaising with Accounts Department 3. Inland Revenue returns and payments	Reporting
4. General Ledger	✓ Lock this Measure
6. Reporting	Performance Standards / Behavioural Indicators if a Competency or Value
7. New employee processing 8. Processing terminations 9. Self Development	Monthly Reports (standard agreed layout followed) to reach HR Manager by 20th of each month Reports include details on serious deviations from set budgets Ad-hoc reports field as dictated by circumstances
11. Administrative Skill	Lock individual measures if necessary
12. Customer Service (Internal)	× *
	Load new Competency from Database Save Cancel
	Rating Key (What performance or behaviour describes each level?)
	Consistently Exceeding Expectations - reflects performance that is consistently exceptional on a continuing basis.
and a second sec	5

If no Default Rating Key was set, you need to download a Rating Key for every measure added. To do this, click the button bottom of page Load Rating Key from Database, and then download an appropriate Rating Key (you can overwrite an incorrectly downloaded Rating Key with another one at any time). Note that you can have different Rating Keys for different measure types if you like.

مرین میں	
Load Rating Key from Database	Save Cancel

Ra	ting Keys	Return
Ge	neric Rating Key 1	
5	Significantly Above Target/Standard (i.e. exceptional)	
4	Above Target/Standard	
3	On Target/Standard (may include slight deviations plus or minus)	
2	Below Target/Standard	N
1	Significantly Below Target/Standard (i.e. unacceptable)	× .
		Load Rating Key
	The second se	and a second second

NOTE: If you have set a Default Rating Key it will download automatically with every new measure added, i.e. when you click: *"Please select a Performance Measure on the left, or <u>click here</u> to create a new one"*

Edit Weightings

(Refer to Weightings in Knowledgebase for more information)

After you have downloaded/entered all the required Performance Measures into the template, click the <u>Edit Weightings</u> button just above the Performance Measures box on the left

(NOTE: This button does not show if you have disabled the weightings and performance percentages in the system).

Performance Measures	Performance Measure Details
12 items have ZERO-weightings Edit Weightings	Please edit the Weightings
 Processing of Weekly, Bi-Monthly and Monthly salary/wage Liaising with Accounts Department Inland Revenue returns and payments 	Please select a Performance Meas

That takes you to the following page:

Edit Weightings:	
Decide on the relative IMPORTANCE WEIGHTING of each Performance Measure (replace the weightings to add up to 100. Give (or change an existing weighting to) a ZERO weighting if specific Appraisee (e.g. the measure was added shortly before appraisal time, and the Appr sufficient time to implement it). The weightings of all remaining measures to add up to 100	e zero's with figures). All t is too early to assess for a raisee would not have had still.
Performance Measures	Weighting
1. Processing of Weekly, Bi-Monthly and Monthly salary/wage runs	20
2. Liaising with Accounts Department	10
3. Inland Revenue returns and payments	10
4. General Ledger	7
5. Budgeting	10
6. Reporting	5
7. Liaise with HR to ensure all new employees are processed on a timely basis	8
8. Processing terminations	5
9. Self Development	5
10. Accuracy	5
11. Administrative Skill	10
12. Customer Service (Internal)	5
	Total: 100
	Save Weightings Return

Read the Instructions. You need to give each Measure an importance weighting (replace the zero's with a figure), with all weightings adding up to 100. Then click <u>Save Weightings</u> (the weightings are added into the equation for calculating the eventual performance percentage).

When individual measures are locked, you also have the option to lock their respective weightings. This way, managers cannot change the details of a locked measure or its weighting.

bulk lock —>	 Lock Unlock the weightings of all locked measures
Performance Measures	Weighting
1. Processing of Weekly, Bi-Monthly and Monthly salary/wage runs	; 20 <u>Unlock Wat</u>
2. Liaising with Accounts Department	Individual IOCK 10 Unlock Wat
3. Inland Revenue returns and payments	10 Lock Wat
4. General Ledger	7
and a second and and and and and and and and and a	and a second dealer from the second dealers

Other Template Manager Features

T-Lock = Template Lock. By ticking this box next to an Appraisal Template, the entire template gets locked, and Appraisors will not be able to edit or delete the performance measures and weightings of a downloaded template, or add any additional measures. Remember to click "Save T-Lock Changes".

You have 14/16 templates in your system				Lock entire to	emplate (all mea	sures)
Job Title	Job Descriptions	Template Exists?	Last Edited	Last Edited By		T-Lock
Accountant	JD - Edit JD - View	Yes	7 Sep 2007	Ben Smith	Edit Template Preview Delete	
	JD - Edit JD - View	No	1 Jan 0001		Create	
Lange de la company de la compan	P = Edit		1 Jan 0001	Anna the	Create	A
	JD - Edit JD - View	Yes	'30 May 2008	Ben Smith	Edit Template Preview Delete	
Warehouse Manager	JD - Edit JD - View	Yes	11 Jun 2009	Ben Smith	Edit Template Preview Delete	
						Save T-Lock Changes

FAQ Note: If you want ALL Template measures to be locked, and not give managers the ability to edit anything in a downloaded Template, or add any additional measures, it is not necessary to lock the individual measures. Just tick the T-Lock tick-box for that Template (see column of T-Lock tick-boxes on the far right-hand side on the Template Manager page). The text of all measures will remain black with the entire Template locked this way.

Templates can also be locked (and unlocked) via the radio buttons at the top of the template itself:

Template for Job Title: Payroll Clerk This template is locked. To enable editing, please unlock it first. O Unlock Template	
Template Preview Make changes to the fields below as needed, then press the Save button at the bottom of this panel.	

Copy Appraisal Templates

This functionality allows you to copy the contents of a selected Appraisal Template to one or more other templates. Once copied, you can still edit individual templates by clicking their "Edit Template" link.

د - مرد ما المسلم المرور ويسم المسلم المسلم المسلم وي المسلم المسلم المسلم المسلم المسلم المسلم المسلم المسلم ا	and the pression of the pression of the
Copy Appraisal Templates	
This functionality allows you to quickly and easily copy the other Templates. Once copied, you can still edit any individe	contents of a selected Appraisal Template to one or more ual Template by clicking its "Edit Template" link.
Select the Appraisal Template that you wish to copy FROM	Select the Appraisal Template that you wish to copy TO. To select more than one, hold down the Ctrl key whilst you select; then click Copy.
Payroll Clerk 🗸	Accountant
·	Accounting Clerk
	CEO
	Driver
	HR Assistant
	Marketing Manager
	Office Manager
	Payroll Clerk
	Select all Template Titles
	Сору

Downloading an Appraisal Template / Creating a New Appraisal

For this next exercise go to **Users** >> **Browse Users**, and open the User File (link on right) of an employee with the same Job Title for which you have created an Appraisal Template above (or create such a User File from scratch first). If this person does not report to you directly, do not worry, as we are going to get him/her to "report to you" temporarily – just so that you can see how this function works! Also consider adding a dummy user, e.g. Joe Sample, with this job title, reporting to you, so you can experiment with him/her as to how the system works. (If you do not have any direct reports, consider keeping this dummy user as your permanent "direct report", so you can see what managers see, and so be able to support them better.)

With the selected person's User File open, select yourself as his/her Appraisor (also make sure the selected Job Title is the one that you have created the Appraisal Template for). If your name does not appear in the Appraisor dropdown list, then go to your own User File first, and tick the Appraisor box under "System Access Privileges" (in such a case, you will need to log out of the system and in again to activate your Appraisor role).

Having done this, click on your role-link "**Appraisor**", top right of your screen (this link will now be highlighted yellow). This takes you to your Appraisor home page, where all your direct reports are listed, along with the status of their appraisals:

Appraiso	r Home						Welco	me Ben Sm	ith Acco	ess privileg	es: <u>CorpAdmin</u> <u>Di</u>	ivAdmin	(Apprai	Appraise
Home	Users	Goals	Appraisals	Reports								1			
												/			
Теа	m's App	raisals													
ppraisa	ils for the cu	irrent period	were due for co	mpletion by 29 Apr 201	2.										
/ the Ap	opraisal Man	ager Page o	r <u>create a new a</u>	opraisal											
			Sele	ct employee and o	lick the desired	action st	ep: Please	select ⊻							
			Create Agreen	wEdit ment Add/ Record I	2 Notes	3 PREP			Compl Appra	ete isal	6 Sign Off				
					R	egular	Appra	isals							
			Apprai	see Appraisa Date	Performance Agreement	Apprai Com	sal Prep pleted	Appraisal Completed	Summ Sign	ary/POP ed Off	Current Period Perf Percent				
						A/sor	A/see		A/sor	A/see					
	Daabba	ord	Emily Ernest	20 Jan 12	2 🗸	*	✓	✓	~	✓	80%				
	Jashbo		Gary Geon	*	click to create	*	*	*	*	*	not completed				
And		Aunt	Jane Blake		and the second			- and the	1-1-1	march		mm		مسى	

Next you need to "create" an Appraisal for the Appraisee selected above. Let's see how this is done.

Select **Appraisals** >> **Create New Appraisal** (or click "<u>click to create</u>"; OR use the link in the popup that shows when you hover your cursor over the Appraisee's name). The following page opens:



Read the instructions carefully.

In **step 1** you need to select the person you want to create an Appraisal for, and in **step 2** the relevant Performance Period (the default will always be the current period). In **step 3a** you will notice that there are four ways in which an Appraisal can be created. Let's focus here only on the first two (please study the others by yourself later - they are self-explanatory).

Option 1: <u>Download Appraisal Template from Database</u> allows you to download an Appraisal Template from the database for the selected employee (in step 1).

Option 2: <u>Create New Appraisal</u> allows you to create an appraisal for somebody from scratch. This option is used when there is <u>no</u> Appraisal Template for this person's Job Title in the Template Database (NOTE: Appraisal Templates are not compulsory; e.g. they may be inappropriate in the case of senior managerial positions). When clicking this link, the same page format will open as with creating Appraisal Templates, i.e. you can download Competencies and Rating Keys; add Goals, Objectives, KPIs and Standards, and Edit Weightings. Such a Performance Agreement will be unique to a specific employee, and will/does not form part of the Appraisal Template Database.

So, to continue with our case study, select the person in step 1 that you have created an Appraisal Template for; then click <u>Download Appraisal Template from Database</u> to download the template for him/her.

The downloaded template is now called a "**Performance Agreement**" (as it now belongs to a specific person with whom the measures need to be discussed and agreed), and looks as follows:

	Performance	Agreement	for Jan Bell				
Agreement P	review	Make changes to the fields below as needed, then press the Save button at the bottom of this panel					
Last Edited	Ben Smith	Notes					
Created	14 Jan 2011		<u>N</u>				
Appraisee	Bell, Jan	Appraisal Date	31 Dec 2011				
Appraisor Perf Period	<u>Ben Smith</u> 1 Jan 2011 - 31 Dec 2011 (current)						
Previous Ap	praisal	Update Matching Measures From Appraisal Template Save					
Performance Measures	Performance Measure I	Details					
Edit	Weightings						
1. Processing of Weekly, Bi-Monthly and Mont	hly salary/wage Please select a Performan	elect a Performance Measure on the left, or <u>click here</u> to create a new one					
Liaising with Accounts Department Jainland Revenue returns and payments General Ledger S. Budgeting							

The Appraisal Date will always, by default, show as the last day of the performance period (see screenshot above). Appraisors should overwrite the default date with the actual appraisal interview date as agreed with the Appraisee. The automated email reminders are triggered by this date, which can be different for each Appraisee.

NOTE: If your system is set for anniversary-based appraisals, this date will default to the same day and month as the "Start Date" in the Appraisee's User File.

Select any of the Performance Measures on the left, and its details will show on the right. These can now be edited if the template (or measure) is unlocked. Ensure that the weightings still add up to 100 if measures were added or deleted.

Performance Measures	Performance Measure Details	
Edit Weightings]	
1. Processing of Weekly, Bi-Monthly and Monthly salary/wag	Goal / Objective / KPI / Competency / Value	
2. Liaising with Accounts Department 3. Inland Revenue returns and payments	Liaising with Accounts Department	
4. General Ledger		
5. Budgeting	Performance Standards / Behavioural Indicators if a Competency or Value	
6. Reporting 7. Liaise with HR to ensure all new employees are processed 8. Processing terminations 9. Self Development 10. Accuracy in a chill	Ensure pay runs are checked by senior member of the Accounts team prior to payment Liaise with Account Manager re the necessary payments to be made into employees' bank accounts	^
11. Administrative Soli 12. Customer Service (Internal)	Load new Competency from Database Save Cano	 el
	Rating Key (What performance or behaviour describes each level?)	
	Significantly Above Target/Standard (i.e. exceptional) 5	~
A second se	Above Target/Stappard	Â

NOTE: This process of creating Appraisals (Performance Agreements) for employees should be done as early as possible at the start of a performance period, so that Appraisees can view theirs at any stage (from their own login), leaving them with no excuse that they "did not know what were required of them".

NOTE: Corp- & DivAdmins can also create appraisals <u>on behalf of</u> line managers (a very useful functionality to give you more control over this). See the following system pages in the Corp- & DivAdmin roles:

- Create New Appraisal: To create appraisals for individually selected employees.
- **Bulk Create Appraisals:** To create appraisals for <u>all</u> employees in selected units, or even the <u>entire</u> organisation, with ONE MOUSE CLICK. Read the instructions on this page carefully.

Appraisals created in bulk by administrators this way get automatically assigned to their respective Appraisees and Appraisors within the system.

Let's now see how appraisals appear as a "workable" document.

Appraisal Manager View

Appraisor Home					M	Velcome	Connie Bean	Access privile	ges: Appraisor)
Home Users Appraisa	s Reports								7	
									1	
My Toom's Approicals									1	
My Team S Appraisals	were due for completion	by 29 Apr 2012								
an appraisais for the carrent period	were due for completion	by 25 Apr 2012.								
View the Appraisal Manager Page or	create a new appraisal									
	Select emp	ovee and clic	k the desired a	ction step: Plea	e select 🗸					
	beleet emp	o, ce una ene		ction Stept						
	Greate/Edit	Add/View	²)			Comrte	⁵ ∖ (@	6		
	Create/Edit Agreement	Add/View Record Note		mplete ³	Hold PPRAISAL MEETING	Comple Apprai		6 gn Off		
	Create/Edit Agreement	Record Note		REP 3	Hold 4 PPRAISAL 4 MEETING	Comple Apprai		6 gn Off		
	Create/Edit Agreement	Add/View Record Note	2 BS Co P Co P Re	REP 3	Hold PPRAISAL MEETING	Comple Apprai	sal	6 gn Off		
	Create/Edit Agreement	Add/View Record Note	2 2 2 2 2 2 2 2 2 2 2 2 2 2	egular Appra	Hold IPPRAISAL MEETING Appraisal Completed	Summa	te sal	6 gn Off		
	Appraisee	Add/View Record Note	2 2 2 2 2 2 2 2 2 2 2 2 2 2	egular Appra Appraisal Prep Completed	Hold IPPRAISAL MEETING Appraisal Completed	Summa Signe	te 5 sal • • • • Si sry/POP Cur ed Off Pe	6 gn Off rent Period rf Percent		
	Agreement	Add/View Record Note	2 2 2 2 2 2 2 2 2 2 2 2 2 2	Appraisal Prep Completed A/sor A/see	Hold A PPRAISAL A MEETING A hisals Appraisal Completed	Summa Signe A/sor	te 5 sal try/POP Cur ed Off Pe A/see	6 gn Off rent Period rf Percent		
Dashboard —	Appraisee	Add/View Record Note	2 2 2 2 2 2 2 2 2 2 2 2 2 2	egular Appra Appraisal Prep Completed A/sor A/see	Hold A PPRAISAL 4 MEETING 4 hisals Appraisal Completed	Summa Alsor	te 5 sal 5 try/POP Cur ed Off Pe A/see not	6 gn Off f Percent completed		

On the Appraisal Manager page you can view and monitor the status of the appraisals of all your direct reports (Appraisees), as well as "indirect" reports if you have further units "under you" (click the UNIT dropdown list in the filter to see the lower-level units). The Appraisal that you have created last will always show at the bottom of the list of appraisals on this page.

		Filter				Apply Filter	Clear Filter			
		Туре	Regular Appraisals	*						
		Options	Appraisees with Apprais	als 🗸 🗸	Appraisor	Smith, Ben				
		Perf Period	1 Jan 2011 - 31 Dec 20	11 (current) 🛛 🔽	Job Title	All Job Titles	*			
		Location	All Locations	~	Appraisee	enter 1st few letters of first/la	ast name			
		Unit	My Direct Reports				*			
		Appraisee L A B C D E F	ast Name GHIJKLMNOP	ORSTUVWX	ΥZ					
My Appraisees	Select All Delete All S	elected Appra	aisals To copy th	e <u>Default Rating</u>	<u>Key</u> to all Appra	isals on this page, <u>click he</u>	ere	Create	e New Appraisal	Export to Spreadsheet
7 results returned										
Appraisee Appraisor	Job Title		Appraisal Date	Signoff				This Period	<u>Yr Cum Avq</u>	
Appraisee: <u>Blake, Jane</u> Appraisor: <u>Smith, Ben</u>	Payroll Clerk		13 Jan 2011	Appraisee Appraisor:	Not yet 14 Jan 2011 (E	en Smith)		93%	93%	Job Description Agreement Perf Record Appraisor Prep Appraisal Summary / POP Delete
Appraisee: <u>Saunders, Josh</u> Appraisor: <u>Smith, Ben</u>	Training Manager		17 Mar 2011	Appraisee Appraisor:	Not yet 14 Jan 2011 (E	en Smith)		105%	105%	Job Description Agreement Perf Record Appraisor Prep Appraisal Summary / POP Delete Delete
Appraisee: <u>Riddle, Tammy</u>	HR Assistant	مسمسر	17 Jun 2011	Appraisee	14 Jan 2011	-		100%	100%	Job Description

The Appraisal Manager page is also a "portal" for gaining access to the following online forms of each Appraisee (see links on far right above and on your pc screen):

Job Description
Agreement
Perf Record
Appraisor Prep
Appraisal
Summary / POP
Delete

- Job Description (if this feature is activated): Shows view/print version of Job Description.
- Agreement: Opens the Performance Agreement, e.g. to edit.

• **Perf Record:** To upload Performance Record Notes of good or poor Appraisee work performance or behaviour throughout the performance period.

• **Appraisor Prep:** Takes you to the Appraisor Preparation (Draft) Form. The Appraisor's PREP form <u>cannot</u> be viewed by the Appraisee, or anybody else for that matter – unless the feature to allow its release is activated in System Settings (Appraisees have their own PREP Form, also

called "Self-Appraisal").

- Appraisal: Takes you to the Official Appraisal Form of the Appraisee (to be completed after the appraisal interview). The contents of the Appraisor PREP Form can be transferred into this form (individual measures, or the entire PREP Form contents in one go see transfer links on the PREP Form).
 NOTE: The Official Appraisal Form cannot be viewed by the Appraisee from his/her login until such time as the Appraisor and Higher Level Manager (HLM) if activated signs off on the Appraisal (the HLM can e.g. be the Appraisor's boss or the Corp- or DivAdmin.).
- Summary/POP: Contains the Performance Percentage Calculations (or rating averages), Performance Optimisation Plans, and signoff links. NOTE: The Summary/POP Form also <u>cannot</u> be viewed by the Appraisee from his/her login until such time as the Appraisor (and HLM if activated) signs off on the Appraisal.
- · Delete: Deletes an appraisal that has not been signed off yet.

NOTE: The Appraisor home page dashboard is another easy way to view the status of employee appraisals, and to access their various appraisal forms via the links in the hover pop-up that shows when putting your cursor over an Appraisee's name:



Performance Record Functionality ("Perf Record" link)



You can disable (in System Settings) the Performance Record Functionality for both Appraisor and Appraisee, or just Appraisees. A system warning will pop up (when clicking "Perf Record") if access had been disabled in this way.

If ENABLED for both parties (the default setting), the Appraisor and the Appraisee will have the ability to upload performance data, and examples of good ("highlight"), general, or poor ("lowlight") work performance or behaviour (incidents) into the system, to "call up" at appraisal time.

Best practice suggests that the line manager should first consult with the employee before uploading such performance record notes. They need to establish all the facts first, give feedback (verbally, and in person if possible), do coaching if necessary, and only then upload such performance record notes into the system.

Such regularly uploaded performance notes will ensure that the FULL performance period is considered during appraisals, and not just the last few months – as the general complaint goes.

You can set the Performance Record accessibility for Appraisees as any one of the following in System Settings:

- Appraisees cannot add or view Performance Record Notes
- Appraisees cannot add Performance Record Notes but can view the Appraisor's
- Appraisee cannot view the Appraisor's Notes but can add their own
- Appraisors can hide individual Performance Record Notes from Appraisees

(Previously covered in this guide; also refer to System Settings>>Performance Record Notes)

The two screenshots below show how a Performance Record Note gets added:

	Filter Measure All, or click to Uploaded by Appraisor & A	select ppraisee	Type	All 🗸	
Performance Record for: Jan Bell, 1 Jan 2011 - 31 Dec 2011 There is no performance record matching the current filter Performance Record					Add Performance Record Note

Add Performance Record Note for Jan Bell							
Measure	Customer Service (Internal)	Туре	Lowlight	*			
Title							
Marketing N	Manager Complaint						
Performa	nce Record Details / Description		Agreement P	review			
Marketing N who said sh them their s	Manager complained that three of his staff members did not receive paysli ne had made some mistakes with their pay calculations and then forgot all slips.	ps. This was dis about setting it	cussed with Jan right and sendir	ng			
	a second and a second and a second and a second	A	(*****./				

Two electronic files can be attached (uploaded) to each Performance Record Note as evidence of the incident recorded, e.g. an email from a client, or a spread sheet with performance data.

When clicking SAVE, a system popup will ask you if you want to notify the Appraisee of the note you have added (done by system-generated email).



(Also REFER to the separate **Appraisor User Guide** for more in-depth details, examples and screenshots in respect of the Appraisor role)

As Appraisor, start with the **Appraisor Prep** form at appraisal time. Enter your provisional notes and ratings in respect of each of the Performance Measures (consult the **Performance Records Notes** in the process), and then print out the PREP Form to take with you to the appraisal interview. The Appraisee needs to do the same with his/her own PREP Form.



NOTE: You can request the Appraisee to release his/her PREP Form to you to preview prior to the appraisal, but first check your organisation's policy in this regard. Such a "released" PREP Form will show as another (red) link on the Appraisal Manager page: "**Appraisee Prep**".

After the appraisal interview, go to the **Official Appraisal Form** ("Appraisal" link), and enter the results of the appraisal as mutually agreed with the Appraisee.



NOTE: You can copy your ratings and notes from your Appraisor PREP Form over to the Official Appraisal Form – one measure at a time, or all in one go by clicking the "Transfer all comments and ratings, and jump to Official Appraisal Form" link at the bottom of the PREP Form. Ratings and notes can also be transferred from a released Appraisee PREP Form to the Official Appraisal Form in exactly the same way.
To attend advanced external Custor	mer Service Workshop.	~
	Transfer contents of one measure at a time	>
ransfer above Measure to Off	icial Appraisal Form	Save Progress
Spell Check	Transfer contents of all measures	

Once you are satisfied with the contents of the Official Appraisal Form (reflecting what was agreed with the Appraisee during the appraisal interview), click the link bottom of page "Submit Ratings and jump to Summary / POP Form".

8
Save Progre

That will take you to the **Summary/POP Form** where the performance calculations show, as well as all the Performance Optimisation Plan (POP) Notes.

Finally, you can enter some overall comments (in the field next to "Appraisor"), and sign the appraisal off by clicking: <u>Sign Off</u> <u>Now.</u>

Select employee and click the desired action step:	: Bell, Jan 💌	Jan Bell
Create/Edit Agreement	Hold 4 APPRAISAL MEETING	Appraisal

Summary/POP Form Sign Off

ame: Jan Bell Job Inte: Payroll Clerk coation: Sydnay Unit: Human Resources->Payroll ppraisal Information ppraisor: Ben Smith Appraisor Job Title: HR Manager erf erfd: 1 Jan 2011 - 31 Dec 2011 Appraisal Date: Fri, 21 Jan 2011 ign Off lease enter any general comments you may have, and then sign the Appraisal off by clicking	
Spraise Finite Finite uppraiser Ben Smith Appraisor Job Title: HR Manager erf 1 Jan 2011 - 31 Dec 2011 Appraisal Date: Fri, 21 Jan 2011 ign Off Gase enter any general comments you may have, and then sign the Appraisal off by clicking	
Appraison Appraison Job Title: HR Manager series 1 Jan 2011 - 31 Dec 2011 Appraisal Date: Fri, 21 Jan 2011 series i Jan 2011 - 31 Dec 2011 Appraisal Date: Fri, 21 Jan 2011 series not series Series Series ign Off Gase enter any general comments you may have, and then sign the Appraisal off by clicking	
uppraisor Job Title: HR Manager erf erfd: 1 Jan 2011 - 31 Dec 2011 Appraisal Date: Fri, 21 Jan 2011 ign Off lease enter any general comments you may have, and then sign the Appraisal off by clicking	
erf 1 Jan 2011 - 31 Dec 2011 Appraisal Date: Fri, 21 Jan 2011 ign Off lease enter any general comments you may have, and then sign the Appraisal off by clicking	
ign Off lease enter any general comments you may have, and then sign the Appraisal off by clicking	
well done with your first year with us Jan. Just give a little more attention to internal customer	1
service, and things can only go better from there.	
I am very satisfied with the way in which you have taken command of your role and the excellent relationship you enjoy with all staff.	
All in all, well done!	

Performance Measures	Rating	Weighting	Weighted Rating	PERFORMANCE OPTIMISATION PLAN (incl. Training & Coaching)
 Processing of Weekly, Bi-Monthly and Monthly salary/wage runs 	2	20	40	Investigate and submit a new operating procedure to cut the weekly wages run time by minimum 20% by 31 December 2011.
2. Liaising with Accounts Department	3	10	30	
3. Inland Revenue returns and payments	3	10	30	
4. General Ledger	4	7	28	Ask Sue to double-check to prevent any errors.
5. Budgeting	4	10	40	
6. Reporting	3	5	15	Also include pie charts with monthly reports to show salary/wages breakdown.
7. New employee processing	3	8	24	
8. Processing terminations	3	5	15	Sue to coach and assist with next three staff terminations.
9. Self Development	3	5	15	80% of planned L&D activities to be completed by 31 October 2011.
10. Accuracy	3	5	15	Manager to provide latest MS Office Suite. Attend MS Excel Advanced workshop externally at Horizons PC Training.
11. Administrative Skill	3	10	30	
12. Customer Service (Internal)	2	5	10	To attend advanced external Customer Service Workshop.
0	verall Peri	100 formance	292 97%	(Weighted Rating Avg: 2.9)

NOTE:

- The Appraisee will not be able to access the Official Appraisal or Summary/POP Forms from their login until such time as you have signed off on the appraisal (as well as the Higher Level Manager if the 3rd level signoff feature of the system had been activated).
- If the Weightings and Performance Percentages feature of the system had been disabled by you, then Rating Averages as opposed to Performance Percentages will show in the system.

Appraisee Signoff

(Study the Appraisee User Guide for more details on the Appraisee role)

Once the Appraisor (and HLM if activated) have signed off, Appraisees should go to their **Appraisals** >> **Appraisal Manager** page (or use their home page dashboard popup, or action step icons) to access the following online forms via the links on the right:

- Job Description (if this feature activated)
- Agreement Preview (to review their measures and standards to achieve)
- Performance Record (if this feature activated) (to add performance record notes, and view the manager's)
- Appraisal Prep (for self-appraisal in private, and to then print out to take to the appraisal interview)
- (Official) Appraisal (read-only view of ratings and notes by Appraisor, as mutually agreed during the appraisal interview)
- Summary/POP (to add own overall comments and sign the appraisal off)

Appraisees should enter their own final overall comments on the Summary/POP Form, and then sign the appraisal off as well. After this had been done, Appraisors cannot make any further changes to any of the appraisal forms, unless they ask the Corpor DivAdmin to undo the signoffs of all parties first.

The Appraisee needs to be aware of and agree to this, such as when both parties agree that something needs to be changed on one of the forms. The normal signoff sequence must then be followed again, with that of the Appraisee taking place LAST to "lock" all the forms again.



TALENTPEAK™ SUMMIT GOAL MANAGEMENT SYSTEM

Marketing Video Link>>http://www.talent-peak.com/summitgoalmanagement.html

The **Summit Goal Management (GM) Module** is an add-on system to the core TalentPeak™ (regular performance appraisals) System <u>or</u> can be set up as a standalone system.

The aim of this guide is to help you to comprehend and set up the Summit Goal Management Module in the shortest possible amount of time. Relevant screenshots are provided, where necessary, for added clarity.

The guide is divided in three sections, illustrating the role of the three main participant levels:

- CorpAdmin
- Manager
- Employee

Fact Note: TalentPeak™ is written in International English Spelling to enable a globally acceptable format

CorpAdmin Role

Goal Management System Settings

Go to System Admin >> Goal Mgt Settings:





Note that both these settings are optional.

Scorecard Perspectives Setup

Your organization may or may not use (balanced) Scorecard Perspectives (KPI Categories). If you do, and you want to use them in the GM Module, then add them on this page. They will then be viewable as a reference for your staff in various places in the system.

Scorecard Perspectives Setup			
Scorecard	Perspectives		
EXAMPLES:	 Financial Customers Internal Business Processes Learning and Growth 	 Manufacturing Processes New Product Development Suppliers Employees 	
Enter your instructions to employees for each Perspective you add, e.g.: Customer <i>Identify those measures that answer the question "How do customers see us?"</i>			
Perspective	Title:		
Font	Size ▼ B I U E E E	E 🐰 🖻 🛍 🗠 🖙 🚝	
Add New	and days. A document do manufacture		

The best known scorecard perspectives are those of Kaplan and Norton. Do a web search on 'Balanced Scorecard' or read more about it here: <u>http://en.wikipedia.org/wiki/Balanced_scorecard</u>

By setting up your organization-specific scorecard perspectives here, you will be able to classify your critical Key Performance Indicators (KPIs) as belonging to specific perspectives. This will help you ensure that the key metrics (KPIs) of your business unit and organization are covered in a balanced way, and an eye kept on them to make sure they stay on track and on target.

Below is an example of what the staff view version looks like (the contents will be whatever you enter into the setup page above):

Scorecard Perspectives
Financial
This perspective answers the question: "When we achieve our vision, how will we look to our shareholders?"
The financial objectives serve as the focus for the objectives and measures in all the other scorecard perspectives. Every measure selected should be part of a link of cause-and-effect relationships that culminate in improving financial performance. The scorecard should tell the story of the strategy, starting with the long-run financial objectives, and then linking them to the sequence of actions that must be taken with financial processes, customers, internal processes, and finally employees and systems to deliver the desired long-run economic performance.
Typical measures in this perspective include:
Return on investment (ROI) (%) Revenue/turnover (\$) Gross profit (\$)

If you do <u>not</u> want to use scorecard perspectives, then leave this scorecard perspectives page empty. It will still be possible to add them at any time later.

Corporate Information

Goal Management Settings
Scorecard Perspectives
(Optional) Here you can add (balanced) scorecard perspectives if your organisation makes use of such perspectives or categories to differentiate between the different types of KPIs you want to measure and cluster together.
Scorecard Perspectives Setup (a)
Corporate Information
(Optional) Here you can add any information you want to convey to your employees, such as your Corporate Strategic Business Plan. When released, it will show as a link 'Corporate Information' at the top of the Goal Manager page in the roles as selected below.
Corporate Information: Edit View (b)
Allow visibility by: $^{\rm C}$ None $^{\rm C}$ Managers $^{\odot}$ Managers & Staff

Add here anything you would like to share with your employees with respect to your corporate strategies and goals, etc.

This, for instance, is a good place to add your Corporate Strategic Business Plan, and to then, once completed, make it visible to managers only, or managers and staff. The contents can be changed at any time, of course, to keep it fresh and current.

Below is a partial example:

Corporate Information		
Strategic Business Plan		
Vision		
To be the preferred and most trusted resource for the products and services that we offer to our clients.		
Mission		
To provide the highest level of service, and the broadest selection of products in our industry, at the most competitive prices.		
Values		
1. Integrity We apply the highest standards of ethical behaviour and practice.		
 We are honest, transparent and open with our clients and each other We respect every individual's right for privacy and confidentiality 		
have been and the second s		

Goal Management Categories and Hierarchy

Corporate Goal Hierarchy

Go to Goals >> Goal Manager:



Select Corporate Goal Hierarchy.



This feature allows a CorpAdmin (who can also be the President/CEO/MD of the organization when you set up multiple CorpAdmins) to build a hierarchy (or library) of Corporate Goals, which can then be made visible to your units lower down, so managers can cascade relevant ones to specific employees/direct reports.

- You need to first create **Goal Categories**, which could e.g. be the same as your Scorecard Perspectives if you make use of the latter.
- Following that, you can add any number of Goals (even sub-goals) to the various Goal Categories.
- See the red 'action links' at the top of the page as to what you can do with each of your selections.
- One or more goals (from any one or more categories and/or goal levels) can be **cascaded** to one or more employees in the organization. This will be illustrated in detail in the Manager (Appraisor) role, as it works the same way there.
- Goal categories and goals can be changed and updated at any time, e.g. annually, or even more frequently.



Individual Goals

Select Individual Goals page.

Goal Manage	r
	Corporate Information
S CORPORATE GOAL HIERARCHY	(Show Details)
INDIVIDUAL GOALS	(Show Details)

Clicking it opens the following three page headers:

- Scorecard Dashboard
- Current Goals page
- Completed Goals (Goal Archive) page

	Corporate Information
CORPORATE GOAL HIERARCHY	(Show Details)
S INDIVIDUAL GOALS	(Hide Details)
Scorecard Dashboard	~
🛿 Current Goals	~
Scompleted Goals (Goal Archive)	

The use of these pages will become clear after studying the Line Manager role below. Suffice it to say at this point that what a manager can see and do on the Goal Manager page for his/her direct reports, the CorpAdmin/s can see and do for all employees in the organization (or for assigned divisions in the case of DivAdmins), except that managers has the right (the default setting) to hide the goals of their direct reports from the Corp-DivAdmin/s, until they are ready or want to give viewing (and even editing) rights to them. Consider developing a company policy in this regard.

Line Manager Role

Go to the Appraisor (line manager) role:



Go to Goals >> Goal Manager:

Goals Appraisals Reports	
Goal Manager	
	Goal Manager
	CORPORATE GOAL HIERARCHY
	MY UNIT/DEPT GOAL HIERARCHY
	INDIVIDUAL GOALS
January and the second se	and the second

Corporate Goal Hierarchy

If made visible to managers by the CorpAdmin, this will be viewable here, and these goals can now be cascaded to any of your direct reports. This process will be illustrated in detail later in this user guide.



My Unit/Dept. Goal Hierarchy

Some goals from the Corporate Goal Hierarchy may be relevant to you as manager, so you can add them here as well, but most importantly, here you can add Goal Categories and Goals <u>specific</u> to your department and operations. This allows you to plan in details all your unit goals, which can then be cascaded to yourself and/or your direct reports. This cascading process will be illustrated further down in the user guide.

	MY UNIT/DEPT GOAL HIERARCHY (Hide Details)
	Create a new Goal Category Create a new (sub) Goal Edit Goal Delete Goal/s Move: UP DOWN
	Cascade Selected Goal/s Cascade Selected Goal/s Cascade Selected Goal/s Cascade Selected Goal/s
	Ensure staff complete 75% minimum of identified L&D
	Performance Management Edit Delete
	Source and Implement an online PM System by 30 Apr 2012
	Recruitment Edit Delete
~	Ensure vacant positions filled within 4 weeks

Individual Goals

- The My Goals tab takes you to your own goals page (which can also be viewed in your Appraisee role).
- The Direct Report Goals tab takes you to your direct reports' goals pages (we will now study these in detail, starting with the Current Goals page in order to follow a logical sequence).

Details)
~
~
~

Current Goals

Opening this page, reveals all your direct report names, and a link "Create a new Goal" with each.



Creating a New Goal

Clicking "Create a new Goal" opens the following pop-up page, where you can enter goal details as illustrated:

Josh S	Saunde	rs (Goal 1)					
		(/	Created By:Ben	Smith (01 Sep 2011)			
			Last Edit By:Ben	Smith (01 Sep 2011)			
Goal Title		60 characters maximum	_				
Increase new clie	ent accounts by 25%	for 2011 fiscal year	Sa	CLose Window			
Goal Descrip	tion / Performa	nce Standards					
The 25% to be b Clients are regar	ased on the 31 Dec 2 ded as new if they ha	010 client account number of 3,50 we never purchased from us, or h	0, i.e. 875 new clients required at minimum. ave re-joined after 3 years of no purchases				
Spell Che	eck		Manager approved Jobholder accepted	:Not Yet <u>approve now</u> I:Not Yet			
Due Date	Priority	Status	Percent Completed	Date Completed			
31 Dec 2011	High 🗸	Not Started	Û100%				
Goal Action Steps (optional) Add (new) Action Step for this Goal							
KPIs (optional) Add (new) KPI relevant to this Goal							

- Goal Title: (1) Start with an action verb, such as 'Increase', 'Implement', 'Ensure', Achieve', 'Complete', etc., (2) add the outcome to be achieved ('increase new client accounts by 25%'), and (3) the due date ('by 31 Dec 2011).
- Description: List additional performance standards to make it as clear as possible to the jobholder (employee) as to what quantitative (KPIs) and qualitative measures and parameters should be achieved and/or adhered to.

Employees can only be productive when they know exactly what are expected of them, i.e. having goals that are SMART :
S - Specific (clearly specify the intended outcome/s)
M - Measurable (quantifiable; state exactly what the criteria for success are and how they will be assessed/measured)
A - Attainable (challenging but achievable; employee must have the skills, time, resources and authority to
deliver
the expected results)
R - Realistic (relevant to the employee's role; must be willing and able to work towards its achievement)
T - Time-bound (clearly define the time frame and/or target date)
To ensure employee commitment and buy-in, jointly discuss and agree their goals with them.

- Due Date: Agree this with the jobholder.
- Priority: Select the relevant option.
- Status & Percent Completed: Set by jobholder as he/she progresses with goal achievement needs to be updated at agreed times, e.g. weekly on Mondays before 10am, so the manager can check on their progress for all direct reports.
- Date Completed: Selected by manager once satisfied that goal had been achieved.
- **Approve:** Manager approves the goal, by clicking the 'approve now' link. This locks the Goal Title, Description, Due Date, and Priority. This approval can be undone at any time by the manager, if changes to the above items need to be made. This will also undo the jobholder goal acceptance (signoff), which needs to be done again after the change and manager new approval.
- Accept: The jobholder needs to accept (sign off on) the goal from his/her login.

Manager approved:Ben Smith (01 Sep 2011) Jobholder accepted:Not Yet <u>accept now</u>
/ // //

Current Goals Page View

When saving the goal and closing the goal pop-up page, it will now show as follows on the Current Goals page.

Josh Saunders Create a new Goal			🗹 Allow go	pal creating and editing	by this Direct Report
Goal Title	Due Date	Priority	Status	Percent Completed	Date Completed
✓ 1. Increase new client accounts by 25% for 2011 fiscal year	31 Dec 2011	High	Not Started	0%	
SELECT GOAL/S TO: <u>Edit/View</u> Move: <u>UP</u> <u>E</u>	DOWN Delete	<u>Move to</u>	o Goal Archive	Copyto: <u>OTHERS</u> <u>APP</u>	RAISAL

You can select a goal again at any later stage to:

- Edit/View
- Move up or down in the list of goals
- Delete
- Move to the Goal Archive (once completed)
- Copy to other direct reports
- Move to the employee's appraisal Agreement (with the core Appraisal System activated)

The Goal Status and Percent Completed need to be update regularly by the jobholder, e.g. on a weekly basis

	Manager approved:Ben Sm Jobholder accepted:Josh Sa	ith (01 Sep 2011) aunders (01 Sep 2011)
Status	Percent Completed	Date Completed
Not Started 🔽	100%	
Not Started Behind Target/Schedule On Target/Schedule Ahead of Target/Schedule Completed Cancelled	regularly updated	by jobholder

When updated this way, it will display as follows:

Goal Title		Due Date	Priority	Status	Percent Completed	Date Completed
1. Increase new client accounts by 25% for 2011 fiscal year	₽	31 Dec 2011	High	On Target/Schedule	30%	

Adding Goal Steps (optional)

Click '<u>Add (new) Action Step for this Goal</u>' if you want to set some key steps to be taken in the execution of the goal (or the jobholder can do this).



Clicking this link opens the following pop-up page, where you can enter the step details as illustrated:

Enter the step details as illustrated:

Josh Saunders (Action Step 1)							
Goal Action Step Title (50 char max)	Due Date	Date Completed					
Identify current client industry spread	15 Sep 2011						
Description							
This will assist in seeing what the industry spread of our current clients is, and to establish where the biggest untapped opportunities are. Present as an Excel table and pie chart.							
Spell Check							
	Last edited by:	Ben Smith (01 Sep 2011)					
		Save CLose Window					

Having entered the steps, they will display as follows on the goal page:

Goal Action Steps (optional) Add (new) Action Step for this Goal							
Action Step	Due Date	Date Completed	Description				
1 Identify current client industry spread	15 Sep 2011		This will assist in seeing what the industry spread of our current clients is, and to establish where the biggest untapped opportunities are. Present as an Excel table and pie chart.				
2 Research a strategy in achieving the set target	21 Oct 2011		Involve the sales management team throughout. Consult latest academic resources, books, etc. on the topic.				
✓ 3 Implement agreed action plan	31 Dec 2011		Submit weekly progress report to CEO				

Adding KPIs (optional)

A KPI is a key <u>quantifiable</u> measure/metric that you want to keep continuous tabs on -- as a crucial, quick (leading) indicator of how the goal is or had been achieved (and how the employee, unit or organization is faring in it). Here are a few examples:

- Sales (\$)
- Budget variance (\$, %)
- No of customers (#)
- Customers lost/churn (%)
- Customer satisfaction index (%)
- Profit / customer (\$)
 Customer Complaints (#)
- On-time delivery (OTD) (%)
- Rejects (#, %)
- Staff turnover (%)

The idea is to act immediately when you notice that these KPIs are behind target, and for that reason they have to show in a place where they are easily visible (i.e. the **Scorecard Dashboard** – see next page).

Click 'Add (new) KPI relevant to this Goal' if you want to set some Key Performance Indicators (KPIs) to be achieved.



NOTE: that while most of the time only one KPI per goal may be relevant (even <u>none</u> if there are no relevant quantifiable metrics), it can happen that more than one KPI may be relevant with certain higher-level goals (e.g. a goal such as '*Increase market share to 40%*', may have various additional KPIs to do with Budgets, Revenue, Profitability, ROI, etc.).

Clicking this link opens the following pop-up page, where you can enter the KPI details as illustrated below. Select a **Value Symbol** relevant to your KPI.

KPI Title (50 char max) Value Symbol Target Actual 2011 Client Gain Number 💜 875.00 620.00 Notes The 25% to be based on the 31 Dec 2010 client account number of 3,500, i.e. 875 new clients required at minimum. Value	
Notes The 25% to be based on the 31 Dec 2010 dient account number of 3,500, i.e. 875 new clients required at minimum. Value Numb Perce	
The 25% to be based on the 31 Dec 2010 dient account number of 3,500, i.e. 875 new clients required At minimum.	
	Symbol er 💌
Spell Check	
Perspectives only show if any were added on the Goal Mgt Setup page → Internal-Business-Processes Learning And Growth	

Having entered the KPI/s, they will display as follows on the goal page:

KPIs (optional) Add (new) KPI relevant to this Goal							
KPI Target Actual Perspective Notes							
✓ 1. 2011 Client Gain	875.00	620.00	Customers	The 25% to be based on the 31 Dec 2010 client account number of 3,500, i.e. 875 new clients required at minimum.			
Edit selected KPI Move seleted KPI UP DOWN Delete selected KPI/s							

Scorecard Dashboard

The KPI shows as a simple bar chart on the **Scorecard Dashboard** page, where managers can have a quick, birds-eye view of the status of the key metrics (KPIs) of all direct reports in their units.



There should be set times arranged when employees need to update their Goals and KPIs <u>Status</u> and <u>Actual</u> figures, e.g. once per week on a Monday by a certain time; middle managers by e.g. a Tuesday; and senior managers by e.g. a Wednesday, so the figures can be 'rolled up' all the way to the top.

"Rolled u performa input re t each high not need report on unique go	performance stats first, which are then viewed by the next higher level, who use it to calculate their own performance stats to input re their own goals, so the next level can do the same again re their own goals, and so on, all the way to the top. This way each higher level only takes what they need from the lower level stats re their own goals to report higher up on. Some KPIs may not need to be 'rolled up', as many goals and KPIs may just be relevant to your own unit level and you may not be required to report on them to your manager, as they have not been set as goals and KPIs for you to achieve (e.g. the goals you have set as unique goals relevant to your own unit only, in your unit Goal Hierarchy).										
NOTE: V Scoreca	/hen no rd Dash	Scorecard Pe board page w	erspectives are used vill look as follows (no	by your organization red <mark>Perspective</mark> hea	i (so none added on the s adings):	etup page), the					
Dirk Goal 1:	Anza Ensure ar	C	ntion of minimum 80%								
	(PI 1: 201	1 Staff Retention	n								
	Actual	74.00%		92.5% Of Target							
l	Target	80.00%									
Goal 2: /	Achieve (PI 1: 201	total sales reve 1 Sales Revenue	nue of \$35m for 2011 fi	scal year							
	Actual Target	\$ 29,000,000.00 \$ 35,000,000.00		82.9% Of Target							

Completed Goals (Goal Archive)

Once a goal is completed, it can be moved to the Goal Archive by the manager.

🗷 Completed Goals (Goal Archive)								
Show O'Keefe, Paddy 💉 All Historic Goals 🗸 [fil								
Paddy O'Keefe								
Goal Title	Due Date	Priority	Status	Percent Completed	Date Completed			
✓ 1. Source and Implement an online								
SELECT GOAL/S TO: <u>View</u> Move: <u>UP</u> <u>DOW</u>	<u>N Move to</u>	Current G	<u>oals</u>					

NOTE: Consider leaving completed goals in the **Current Goals** section until the end of the performance year, so they can first be moved to the employee's Appraisal Agreement, to form part of the employee's performance measures (if you have not already done so at the start of the performance year when adding the goals). This is only true if your organization has subscribed to the core TalentPeak[™] System as well.

Cascading Goals

Goals can be cascaded from either the Corporate or Unit/Dept. Goal Hierarchies. Select goals from anywhere in a hierarchy, and then click the "Cascade Selected Goals" button.

MY UNIT/DEPT GOAL HIERARCHY	(Hide Details)
Create a new Goal Category Delete Goal/s Move: UP DOW	/N
 Employees Edit Delete Ensure annual staff retention of minimum 80% Ensure staff complete 75% minimum of identified L&D Performance Management Edit Delete Source and Implement an online PM System by 20 Apr 20 	Cascade Selected Goal/s
□ Recruitment Edit Delete Select → ✓ Ensure vacant positions filled within 4 weeks C/ □ Staff Remuneration Edit Delete C/ → ✓ Conduct staff compensation survey by 31 Oct 2011	ct Goals, and click ASCADE button
→ Implement new Sales Compensation Plan by 28 Feb 2011	and the second second second second

- The first pop-up below shows, where you can select one or more employees to cascade the goal/s to, including yourself.
- The second pop-up shows when clicking the "View Cascading Summary" button.

Cascading Summary View:

Select employees to cascade the goals to:	CASCADING SUMMARY		
□ Blake, Jane □ Brown, Liz □ Direct □ Dixon, Sally □ Huon, Hank □ Jones, Terry □ O'Keefe, Paddy	The following selected goals 1. Ensure vacant positions filled within 4 weeks 2. Conduct staff compensation survey by 31 Oct 2011 3. Implement new Sales Compensation Plan by 28 Feb 2011		
 Planit, Peter Riddle, Tammy Saunders, Josh 	will be cascaded to: Dixon, Sally Recruitment Manager		
Cancel View Cascadeing Summary	Cancel Complete Cascading		

When you finally click the "Complete Cascading" button on pop-up two above, the goals will now show under the employee's name on the goals page, where they can be edited (Due Dates, Priorities, Steps, KPIs, etc. added).

Sally Dixon <u>Create a new Goal</u> Mereate a new Goal							
🔲 Goal Title	Due Date	Priority	Status	Percent Completed	Date Completed		
1. Ensure vacant positions filled within 4 weeks			Not Started	0%			
2. Conduct staff compensation survey by 31 Oct 2011			Not Started	0%			
☐ 3. Implement new Sales Compensation Plan by 28 Feb 2011			Not Started	0%			

Copying Goals to other Direct Reports

Goals can also be copied from your own or any direct report list of goals, to any one or more other employees. This process is illustrated below:

Liz Brown Create a new Goal ✓ Allow goal creating and editing by this Direct Report							
Goal Title Due Date Priority Status Percent Completed Date Complete							
1. Ensure annual staff retention of minimum 80%	25 Nov 2011	Medium	Behind Target/Schedule	53%			
✓ 2. Ensure staff complete 75% minimum of identified L&D	31 Dec 2011	Critical	On Target/Schedule	30%			
SELECT GOAL/S TO: Edit/View Move: UP Select goal/s,	DOWN Dele	te <u>Move</u> ∎Copy	to Goal Archive to OTHEF	Copy to: <u>OTHERS</u> <u>AP</u>	PRAISAL		

Select employees to copy the goals to:	GOAL COPYING SUMMARY
 Smith, Ben Blake, Jane Brown, Liz Dixon, Sally Huon, Hank Jones, Terry O'Keefe, Paddy 	The following selected goals 1. Ensure annual staff retention of minimum 80% 2. Ensure staff complete 75% minimum of identified L&D
 Planit, Peter Riddle, Tammy Saunders, Josh 	will be copied to: Jones, Terry HR Officer Planit, Peter HR Officer
Cancel View Copying Summary	✓ Include Goal Action Steps (due dates are excluded) □ Include KPIs (targets are excluded) Cancel Complete Copying

Copying Goals to Appraisals

Goals can be copied to the Performance Agreements of employees when you are ready to do so. This process is illustrated below:

Sally Dixon Create a new Goal Create a new Goal Allow goal creating and editing by this Direct Report							
Goal Title Due Date Priority Status Percent Completed Date Completed							
✓ 1. Ensure vacant positions filled within 4 weeks			Not Started	0%			
✓ 2. Conduct staff compensation survey by 31 Oct 2011			Not Started	0%			
 ✓ 3. Implement new Sales Compensation Plan by 28 Feb 2011 			Not Started	0%			
SELECT GOAL/S TO: Edit/View Move: UP Select goal	DOWN <u>Dele</u> /s, and th	te <u>Move</u> 1en Co	to Goal Archive	Copy to: OTHERS AP	PRAISAL		

Pr	evious Appraisal
Performance Measures	Performance Measure Details
3 items have ZERO-weightings Edit Weightings	Please edit the Weightings
 Ensure vacant positions filled within 4 weeks Conduct staff compensation survey by 31 Oct 2011 Implement new Sales Compensation Plan by 28 Feb 201: 	Please select a Performance Measure on the left, or

Summit Goal™ System Alerts

Different alerts will show when copying the goals over to the employee's Appraisal.

Following is a brief summary:

En	nployee Current Appraisal Status	System Action		
•	An Appraisal for this employee does not exist yet:	The Appraisal will be created and the goals copied to it.		
•	An Appraisal for this employee already exists:	The goals will be added to the measures it already has.		
•	An Appraisal for this employee already exists, but the Performance Agreement is locked:	The goals will NOT be added to the measures it already has.		
•	An Appraisal for this employee already exists, but the Summary/POP Form has already been signed off by the Appraisor:	The goals will NOT be added to the measures it already has.		

Visibility & Editing Rights

Giving visibility & editing rights to Corp-/DivAdmins & Direct Reports

- The default of the system is that Corp-/DivAdmins cannot view or edit the goals of employees, unless their line managers
 specifically activate the first two tick boxes on the Current Goals page.
- Direct Reports are always able to view the goals set by their managers, but the third tick box need activation for them to be able to edit their goals as well (e.g. to add their own goals for manager approval, or to update the status of their goal completion). Editing rights can also be given to individual employees, as opposed to them all.



Employee Role

Access and Visibility

The employee has access to the following goal hierarchies and pages:

	Corporate Information
S CORPORATE GOAL HIERARCHY	(Show Details)
S MY GOAL HIERARCHY	(Show Details)
8 MY GOALS	(Hide Details)
Scorecard Dashboard	
S Current Goals	
Scompleted Goals (Goal Archive)	

Corporate Goal Hierarchy

Visibility only if allowed by the CorpAdmin. Goals can be cascaded as well, but only to him/herself.

My Goal Hierarchy

A place where the employee can plan his/her own goals. Goals can be cascaded as well, but only to him/herself.

Select employees to cascade the goals to:

Current Goals

In the example below, editing rights were given to the employee by her manager. If not, then the goals can only be viewed, but not edited.

Sally Dixon Create a new Goal							
Goal Title Due Date Priority Status Percent Completed Date Completed							
1. Ensure vacant positions filled within 4 weeks			Not Started	0%			
2. Conduct staff compensation survey by 31 Oct 2011			Not Started	0%			
3. Implement new Sales Compensation Plan by 28 Feb 2011			Not Started	0%			
SELECT GOAL/S TO: <u>Edit/View</u> Move: <u>UP</u>	DOWN Dele	<u>te</u>					



TALENTPEAK™ LEARNING & DEVELOPMENT MANAGEMENT SYSTEM

Marketing Video Link>> http://www.talent-peak.com/learningmanagement.html

Requires Add-On Module Activation

The Learning & Development Management Module is an add-on (extra-cost) system to TalentPeak™ (regular performance appraisals).

TalentP System	eak Administration		L&D Library Setup – Step 1
Home	System Admin	Users	
	Units Locations Job Titles Ad-Hoc Categories 360 Appraisal Titles System Settings Performance Periods		The L&D Library is the place where you can add all the formal learning/training and development (L&D) activities and interventions that your organization offers to your employees, i.e. all INTERNAL and EXTERNAL courses, seminars, workshops, conferences, etc.
	Auto Emails Buk Emails Goal Mgt Settings		The first thing to do, however, is to set up the L&D values that you will need, on the L&D Library Setup page. By clicking on the L&D Library tab from within the CorpAdmin System Admin, will open up the L&D library in a separate browser window. Next click the button indicated by the arrow in the screenshot below "Step 1" L&D Library Setup. Follow the instructions and complete each of the 5 sections on the L&D Library Setup webpage.

STEP	P1 STEP 3			Learning an	nd D	evelopment	Library			
L&D Library	Setup PDP Setup									
A.Learn	ning and Develop	oment Categor	ries							
		F	ilter	Discontinued Ite	ms:	• Exclude • Include	Apply Filter	Clear Filter		
		L8	&D Item:	All L&D Items Provider:	: 4	All Providers	Competencies:			
		No	o/ID:	All Item No/IDs Target 0	Group:	All Target Groups	Accountability Accuracy	(E)		
	S	TEP 2		You can select multiple Com	petencie	s by using your CTRL key	Action Orientation / A Active Listening Administrative Skill Analytical Skill	vchievement T		
To add a ne Examples: Ma Category 1. Sales	ew L&D Category, <u>Click</u> anagement Training, Custom Sample Title Skills ew L&D Item/Activity for t	Here her Service Training, Te	echnical Tra Edit <u>Dele</u>	aining, OH&S Training, etc. te						
1.1 Princi	iples of Partnership Sel	ling E	Edit Delete	e	© Disc	ontinued		Con	npetencies added in L&D Library	
No/ID	Provider	Duration	Target C	Group	Brief D	Description			Key Competencies	Details
Module 1 Partnering	Insights For Performance External	3 Hours	Sales	Staff	The Part is to tead custome marketpl www.ins	thering Module is one of seven ch the sales rep how to bridge ers' needs, while determining he lace and create financial stabil ightsforperformance.com >> s	3 hour modules. The P your company's offering ow to maintain a strong ity. To learn more go to ales training	rogram Purpose gs and your presence in the	• Sales Skills	View

	/	Value Exa
Target Groups MPLES: All Staff, Senior Management, M hnicians, etc.	iddle Management, Su	pervisors, Sales
	Add New	
Target Group Name		
ministrative Assistants	Edit Delete	
missions Office	Edit Delete	
Staff	Edit Delete	
ance Staff	Edit Delete	
Compensation & Benefits	Edit Delete	
Generalists	Edit Delete	
Recruiting	Edit Delete	
Engineers	Edit Delete	
intenance Technicians	Edit Delete	
ddle Management	Edit Delete	
w Managers	Edit Delete	
les Staff	Edit Delete	
nior Managers	Edit Delete	
rvice Technicians	Edit Delete	
pervisor	Edit Delete	

Target Groups

Add your organization-specific values using the examples provided to guide you. You can come back any time later to add to or edit your required values.

NOTE: Editing Target Groups will equally affect existing L&D Items in the Library & PDPs where these Target Groups were selected

3. Attainment Options

Attendance Certificate

Distinction

Failed

Passed

were selected

Attainment Option Name

2. Status Options EXAMPLES: Started, Not Started, Paused, Enrolled, Pending, Scheduled, In Progress, Completed N/A, etc

Status Option Name	
Completed	
	Edit Delete
Enrolled	Edit Delete
In Progress	Edit Delete
Not Started	Edit Delete
Paused	Edit Delete
Pending	Edit Delete
Scheduled	Edit Delete
Started	Edit Delete

EXAMPLES: Passed, Failed, Distinction, Attendance Certificate, N/A, etc.

NOTE: Editing Status Options will equally affect existing PDPs where these Status Options were selected.

Add New

Edit Delete

Edit Delete

Edit Delete

Edit Delete

NOTE: Editing Attainment Options will equally affect existing PDPs where these Attainment Options

Status Options

Add your organization-specific Status options using the examples provided to guide you.

NOTE: Editing Status Options will equally affect existing PDPs where these Status Options were selected

Attainment Options

Add your organization-specific Attainment options using the examples provided to guide you.

NOTE: Editing Attainment Options will equally affect existing PDPs where these Attainment Options were selected



Key Competencies

Add the competencies as covered by the L&D activities you have on offer. Limit these (ideally) to the 1 to 3 (max 5) KEY competencies covered by each L&D activity, so your managers will know which one/s will best address a specific employee learning need.

Selecting the Competencies from the core appraisal system Competency Library will load them; they will be visible in blue are not editable. To add others, enter text into box and click "add new".

NOTE: Editing Key Competencies will equally affect existing L&D Items in the Library & PDPs where these Key Competencies were selected

5. Providers

EXAMPLES: L&D Department, HR Department, ABC Training Ltd (external providers), etc.

Provider Name	Option	
Community College	External	Edit Delete
Insights For Performance	External	Edit Delete
Learning & Development Department	Internal	Edit Delete
SAHA	Internal	Edit Delete
SHRM	Internal	Edit Delete
SkillSoft	External	Edit Delete

Providers

Add your organization-specific name of "Providers" and indicate if they are Internal or External and click "Add New".

NOTE: Editing Provider Names will equally affect existing L&D Items in the Library & PDPs where these Provider Names were selected

Once completed, scroll to the bottom and select "CLOSE WINDOW" to save. This will return you to the Library View which is open in a separate browser window.

L&D Categories – Step 2

Adding L&D Categories

				Lean	ing and i	rerepinent				
&D Librar	y Setup PDP Setup									
Lear	ning and Develo	opment Cate	gories							
			Filter	Dis	scontinued Items:	Exclude Include	Apply Filter	Clear Filter		
			L&D Item:	All L&D Items	Provider:	All Providers	Competencies:			
			No/ID:	All Item No/IDs	Target Group:	All Target Groups	Accountability Accuracy Action Orientation /	Chievement		
		STEP 2		You can sele	ect multiple Competend	ies by using your CTRL key	Active Listening Administrative Skill Analytical Skill	-		
add a n amples: M	new L&D Category, <u>Clic</u> Management Training, Custo	ck Here omer Service Trainin	g, Technical T	raining, OH&S Tra	ו 15 ו aining, etc.	results returned				
add a n amples: M Categor . Sales o add a r	new L&D Category, <u>Clic</u> Management Training, Custo y Sample Title Skills new L&D Item/Activity for	ck Here omer Service Trainin r this Category, <u>Cl</u>	g, Technical T <u>Edit</u> Dele ick Here Edit Dele	raining, OH&S Tra	15 ı aining, etc. ∕e © Inactive © Di	esults returned		Com	petencies added in L&D Libra	TV.
add a n amples: M Categor . Sales o add a n 1.1 Prind No/ID	hew L&D Category, <u>Clic</u> Anagement Training, Custor y Sample Title Skills new L&D Item/Activity for ciples of Partnership So Provider	ck Here omer Service Trainin r this Category, Cl elling Duration	g, Technical T <u>Edit Dele</u> ick Here Edit Dele Target	raining, OH&S Tra ate ie @ Activ Group	15 ı aining, etc. ve ⊚ Inactive ⊚ Di Brie	results returned scontinued f Description		Com	petencies added in L&D Libra Key Competencies	CV De

Step A:	
To add a ne Examples: Ma	&D Category, <u>Click Here</u> ement Training, Customer Service Training, Technical Training, OH&S Training, etc.
Add a new L	Category, and 'Save'
→ Sample Catego	itle <u>Save</u>
Enter new	egory title above and click Save
1. Sales S	Ils <u>Edit</u> <u>Delete</u>
To add a ne	&D Item/Activity for this Category, Click Here

Step B: Scroll down to bottom of page to view your new category



Editing Active or Discontinued L & D Items/Activities

o add a	new L&D Item/Activity for	ent this Category, <u>C</u>	Edit Delete lick Here			
12.1 Wi	iting Employee Reviews	5	Edit Delete	CActive Inactive Discontinued		
No/ID	Provider	Duration	Target Group	Brief Description	Key Competencies	De
231	Insights For Performance	2 hours	New Managers	Learn how to write a professional review. To learn more visit this w	eb site: • Functional Expertise	Vie
	External			www.insightsforperformance.com		
Die		10 - 41 - 141				
. Disc	continued L&D Ite	ems/Activiti	ies [Legend Key for Active, Inactive & Discontinued L&D Items/Activities		
. Disc ey	continued L&D Ite	əms/Activiti	ies	Legend Key for Active, Inactive & Discontinued L&D Items/Activities		

PDP Setup – Step 3

STEF	P1 STEP 3			Learning and	d Development	Library		
L&D Library	Setup PDP Setup							
A.Learr	ning and Develo	pment Catego	ories					
-			Filter	Discontinued Item	s: 🔍 Exclude 🔿 Include	Apply Filter Clear Filter		
		L	L&D Item:	All L&D Items Provider:	All Providers	Competencies:		
		1	No/ID:	All Item No/IDs Target Gr	oup: All Target Groups	Accountability		
	s	TEP 2		You can select multiple Comp	etencies by using your CTRL key	Action Orientation / Achievement Active Listening Administrative Skil Analytical Skil		
To add a ne Examples: Ma Category	ew L&D Category, <u>Click</u> anagement Training, Custor Sample Title	<u>k Here</u> mer Service Training, T	echnical T	raining, OH&S Training, etc.				
1. Sales To add a n	Skills lew L&D Item/Activity for	this Category, <u>Click</u>	Edit Dele Here	<u>ete</u>				
1.1 Princ	1.1 Principles of Partnership Selling Edit Delete © Active © Inactive © Discontinued L&D Library							
No/ID	Provider	Duration	Target	Group	Brief Description		Key Competencies	Details
Module 1 Partnering	Insights For Performance External	3 Hours	Sales	Staff	The Partnering Module is one of sever s to teach the sales rep how to bridge customers' needs, while determining h marketplace and create financial stabi www.insightsforperformance.com >> s	3 hour modules. The Program Purpose your company's offerings and your now to maintain a strong presence in the lity. To learn more go to sales training	• Sales Skills	View

On the **PDP Setup** page (see arrow Step 3 in the screenshot above), you need to set up the **PDP Category Headings** that you want to appear on all employee PDPs.

	Personal Developr	nent Plan (Pl	OP) Setup
1. PI EXAN	DP Category Headings IPLES: Job/Functional Training, Personal I	Development, Career De	velopment, etc.
	Category Name		
▲ ▼	Career Development	Edit Delete	
▲ ▼	Compliance	Edit Delete	
▲ ▼	Job Function Training	Edit Delete	
▲ ▼	Personal Development	Edit Delete	
Click f Chang NOTE emplo	the arrows on the left to move categories u jing the order of the categories above will a : Editing PDP Category Headings will equa yee PDPs.	p or down. also change them accord ally affect existing PDP C	tingly on all employee PDPs. ategory Headings in

Adding, Editing or Deleting PDP Category Headings

Add here, the categories of L&D that you want to appear on all employee PDPs. Changing the order here (use up/down arrows) will change it accordingly on all PDPs.

NOTE: Editing PDP Category Headings will equally affect existing PDP Category Headings in employee PDP's

	My L&D Wishlist • My Brag File My Career Plan • My Competency & Skill Sets My Resume • My Major Past & Current Projects	
inter ly Re Pleas	your instructions to employees for each header page you create, e. sume e add your detailed resume covering your last school grade attained, to your p your resume current and up to date.	g.: current role. Reme
age	Title:	
For	nt 🔽 Sze 🗸 🛯 Z 🗉 🗄 任 年 🐇 🗅 🔞 🕫 🕫 🏭	
Add	New	
Add	New CURRENT PDP HEADER PAGES	
Add	New CURRENT PDP HEADER PAGES Page Title: My Career Plan Employee Instructions: Please provide your short and long term career goals.	Edit Delete
Add	New CURRENT PDP HEADER PAGES Page Title: My Career Plan Employee Instructions: Please provide your short and long term career goals. Page Title: My Learning and Development Wishlist Employee Instructions:	Edit Delete
Add	New CURRENT PDP HEADER PAGES Page Title: My Career Plan Employee Instructions: Please provide your short and long term career goals. Page Title: My Learning and Development Wishlist Employee Instructions: Page Title: My Brag File Employee Instructions: Share your accomplishments that you are proud of.	Edit Delete Edit Delete Edit Delete
Add	CURRENT PDP HEADER PAGES Page Title: My Career Plan Employee Instructions: Please provide your short and long term career goals. Page Title: My Learning and Development Wishlist Employee Instructions: Page Title: My Brag File Employee Instructions: Share your accomplishments that you are proud of. Page Title: My Past and Current Projects Employee Instructions:	Edit Delete Edit Delete Edit Delete Edit Delete Edit Delete
Add	New CURRENT PDP HEADER PAGES Page Title: My Career Plan Employee Instructions: Please provide your short and long term career goals. Page Title: My Learning and Development Wishlist Employee Instructions: Page Title: My Brag File Employee Instructions: Share your accomplishments that you are proud of. Page Title: My Past and Current Projects Employee Instructions: Page Title: My Resume Employee Instructions: Page Title: My Resume Employee Instructions:	Edit Delete

Add, Edit or Delete PDP Header Pages

Add here, the PDP header Page Titles that you want to appear on all employee PDPs. Changing the order here (use up/down arrows) will change it accordingly on all PDPs.

Enter the "Page Title" and any employee instructions using the easy html editor. Click on "Add New" when finished.

NOTE: Editing PDP Header Page titles or instructions will equally affect the PDP Header Page titles and instructions in employee PDPs.

To **edit** any of the current PDP Header pages, select "Edit" and add correction or edit the text in the text editor. Click on UPDATE to Save and close browser window to PDP Set up.

	CURRENT PDP HEADER PAGES	
•	Page Title: My Career Plan Employee Instructions: Please provide your short and long term career goals.	Edit Delete
*	Page Title: My Learning and Development Wishlist Employee Instructions:	Edit Delete
\$	Page Title: My Brag Fle Page Instruction: Font Select Edit Share your accomplishments that you are proud of. Add additional text here or correct Click on UPDATE to save	Update Cancel
*	Page Title: My Past and Current Projects Employee Instructions:	Edit Delete
*	Page Title: My Resume Employee Instructions: Please post your current resume.	Edit Delete
	Barro Titles Assessment Course	

NOTE: Editing PDP Header Page titles or instructions will equally affect the PDP Header Page titles and instructions in employee PDPs.

Close Window

System /	Administration	licens						
	Units Locations Job Titles Ad-Hoc Categories 360 Appraisel Titles System Settings Performance Periods Auto Emails Buk Emails God Mgt Settings L&D Library	Re	eturn to	o your open bro stem Settings>>	owser window for L & D Library. You	r the "Learning & D u should be viewin	evelopment Library" o g this page, as seen b	or locate it
L&D Library Sr A. Learni	retup PDP Setup	oment Cates	gories	Learning ar	nd Development	Library		
			Filtor	Discontinued It	mer Oraslada Oraslad	Apply Filter Clear Filter		
			18D Item:	ALL&D Items Provide	r: All Providers	Competencies:		
			No/ID:	Al Item No/IDs	Group: All Target Groups	Accountability		
				You can select multiple Con	npetencies by using your CTRL key	Accuracy (E) Action Orientation / Achievement Active Listening Administrative Skill		
					15 results returned	CALCARVOCAL SKIL		
o add a new xamples: Man Category S 1. Sales S	v L&D Category, <u>Click</u> nagement Training, Custor Sample Title kills	<u>: Here</u> ner Service Training	g, Technical Tra <u>Edit</u> Delet	aining, OH&S Training, etc. te				
To add a nev	w L&D Item/Activity for	his Category, <u>Cli</u>	ick Here	STED A				
1.1 Princip	les of Partnership Se	ling	Edit Delete	Active Inactive	Discontinued	Co	mpetencies added viewable here	
					Brief Description		Koy Competencies	Detaile
No/ID F	Provider	Duration	Target G	Froup	Brier Description		Rey competencies	Details

L&D Items/Activities for Each Category – Step 4

Man add a	agement/Super a new L&D Item/Actional Lea	ivity for this Ca adership	ining Edit Delete ategory, <u>Click Here</u>	E.g.: Transformational Leadership		
No/ID	Provider	Duration	Target Group	Brief Description	Key Competencies	Detai
MGT1	Manly Business School External	5 Days	Senior Management	Through our top-ranked, educational approach, featuring classroom instruction, simulations, and personal assessment and one-on-one coaching, you will assess your leadership abilities. You will practice new skills. You will build an action plan - and you will become a more effective leader.	Business Thinking/Acumen Leadership Managing Change Strategic Thinking / Visioning	View
.2 Ma	naging Change	Duration	Edit Delete	Active O Inactive O Discontinued	Last Edited By: Joe Jone	es 21 Jan 2
MGT2	Les Brown & Asso	2 Days	Middle Management Senior Management	How to pro-actively take charge of change in your unit and organization, and not be its victim.	Leadership Managing Change	Viev

When you click "To add a new L&D Item/Activity for this Category, <u>Click Here</u>", a pop-up page will open where you need to enter the details of the L&D activity.

	L&D Activity Page
Category Name: Man	agement/Supervisory Training
Item / Activity Name: *	Transformational Leadership
No / ID: *	MGT1
Provider:	Manly Business SchoolExternal
Duration:	5 Days
Target Group:	 All Staff Middle Management Sales Staff ✓ Senior Management Supervisors Technicians
Brief Description: (500 char max)	Through our top-ranked, educational approach, featuring classroom instruction, simulations, and personal assessment and one-on-one coaching, you will assess any releadership abilities. You will practice the second secon

Some notes on completion:

- No/ID: Your own L&D Item/Activity Number/ID, or the one provided by an external provider.
- Duration: Add number of hours, days, weeks, or months (years?).
- **Competencies:** Select the 1 to 3 KEY (max 5) competencies covered by the L&D activity. Ask an external provider what they are if not provided with their L&D activity write-up.
- **Details:** Any amount of details in respect of the L&D activity can be added here. <u>TIP</u>: First add and edit this in a WORD document, remove all formatting such as bullets, numbering and indents (use Arial 10 font throughout), add colour as required, and only then paste it into the DETAILS section of this page. THEN do all the formatting required by using the editing buttons at the top.
- Attachments: Up to two electronic files can be uploaded, such as course application forms and PDF brochures.

Read the KEY at the bottom of the L&D Library page to see what the radio buttons (Active, Inactive, and Discontinued) mean.

The Personal Development Plan (PDP)

Once a learning need (competency gap) has been established (e.g. through a performance appraisal), the employee's PDP can be opened and suitable L&D activities selected from the L&D Library, for downloading into the PDP (see the last page of this user guide for a broader understanding of potential L&D needs drivers and identification tools/methods).

	Personal Development Plan Connie Bean <u>View User File</u> Job Title: Accountant Unit: Accounting Location: Boston Line Manager: Tom Hanko										
A 1.	Listed • Learn • Exam	Current Learning	opment Activ Activities picked fr eminars, e-Lear	opment Ac vities om the Corporate I ning, Computer-ba	tivities L&D Library. sed Training,	Books, Videos, et	с.				
1	To pick L	&D Items/Activities from the C	orporate L&D Lib Due Date	Approved By	Status	Date Completed	Attainment	Signed Off By	Notes	Edit	
	MGT1	Transformational Leadership Details	27 Feb 2009	Joe Jones 26 Jan 2009	Enrolled			Sign Off		Edit Delete	
	MGT2 Managing Change 31 Jul 2009 Joe Jones 26 Jan 2009 Sign Off Sign Off Edit Delete										

To access the L&D Library from within a PDP, click the link (under the relevant PDP category): "To pick L&D Items/Activities from the Corporate L&D Library, <u>Click Here</u>" (see arrow above)

This will open the L&D Library where the required L&D activities can be selected for downloading to the PDP.

	Co	orpor	ate Learnin	g and Develop	ment Library	1	
	Filter L&D Item: No/ID:	All L&D Ite All Item N	ms Provider: p/IDs 💽 Target G	All Providers roup: All Target Groups	Apply Filter Cle Competencies (use CTRL Active Listening Analytical Skill Business Thinking/Acumen Coaching / Mentoring Conflict Management	ar Filter) Key):	
. Manage	ement/Sup	ervisor	v Training				
✓ 1.1 Tra	ansformation	nal Lead	ership				
✓ 1.1 Transmission No/ID Pr MGT1 Manly Scho Exter	ansformation rovider Di y Business S iol mal	nal Lead uration 5 Days	ership Target Group • Senior Management	Brief Description Through our top-ranked, educatio approach, featuring classroom in simulations, and personal assess one-on-one coaching, you will as leadership abilities. You will prac skills. You will build an action plan will become a more effective lead	In al struction, iment and isess your in - and you ler. Key Com • Business Th • Leadership • Managing Ch • Strategic Thi	n petencies inking/Acumen nange inking / Visioning	Details <u>View</u>
✓ 1.1 Tra No/ID Pr MGT1 Manly Scho Exter ✓ 1.2 Ma No/ID Pr	ansformation rovider Di y Business S ol mal	nal Lead uration 5 Days nge uration	ership Target Group • Senior Management	Brief Description Through our top-ranked, educatio approach, featuring classroom in simulations, and personal assess one-on-one coaching, you will as leadership abilities. You will pract skills. You will build an action plan will become a more effective lead	In al struction, ment and isess your ice new n - and you der. Key Com	petencies inking/Acumen nange inking / Visioning	Details <u>View</u>

Downloaded L&D activities can now be edited as required.

,_~~.	- Jan - market a	and and I	and and		~~~/~*	~=- v.v.~	an an an an Arain an Arainn an Arainn an Ar	and a star a s	·
A. My	Current Learnin	g and Dev	elopment	Activities					
 Lister Lean Exam 1.1 Job To pick L 	d Learning and Deve ning and Development Item nples: Courses, Workshops b/Functional Training .&D Items/Activities from the	elopment Ac Is/Activities picker s, Seminars, e-Le e Corporate L&D I	tivities d from the Corpo arning, Compute Library, <u>Click Her</u>	rate L&D Library. er-based Training, <u>re</u>	Books, Videos, e	tc.			
No/ID	L&D Item/Activity	Due Date	Approved By	Status	Date Completed	Attainment	Signed Off By	Notes	Edit
MGT1	Transformational Leadership Details	27 Feb 2009	Joe Jones 26 Jan 2009 <u>Undo</u>	Enrolled		Pse select 💌	<u>Sign Off</u>		Update Cancel
MGT2	Managing Change Details	31 Jul 2009	Joe Jones 26 Jan 2009				Sign Off		<u>Edit</u> Delete
	Rroblem Solving and Decision	-20- hum 2 M R	Automa .			Land Land	Si Off.	and manual	Edit

Some L&D activities will not be formal or classroom-based (i.e. not listed in the L&D Library), but better addressed on the job, such as: On-The-Job Training/Coaching, Mentoring, Shadowing, Job Rotation, Projects, Assignments, Secondments, Delegated Tasks, Site Experience, Work Manuals, etc.

These are added in the Other Learning and Development Activities section.

	2. Other • Exam	r Learning and Deve	Iopment Activities Coaching, Mentoring, Shadowing, Job Re	otation, Projects, A	ssignments, Seco	مر سیب سرت سرت سرت میں	ience, Work Manu	ials, etc.
L	To add	a new L&D Actvity, <u>Click I</u>	Here					
L	No	Learning Need Description	Action Plan Responsibilities & Resources	Due Date	Date Completed	Notes	Signed Off By	Edit
	1	To improve annual budgeting accuracy	Coaching by Accountant. Joe Jones to arrange.	28 Feb 2009			Sign Off	Edit Delete
	~	and a second state of the second	and a state of the			and the second	hand have	

L&D activities signed off as successfully completed will move into the HISTORY section of the PDP.

. wy	Completed Learn	ing and De	velopment	t Activitie	s (History)				
Listed	d Learning and Deve	lopment Activ	vities						
.1 Job	/Functional Training								
No/ID	L&D Item/Activity	Due Date	Approved By	Status	Date Completed	Attainment	Signed Off By	Notes	Edit
0853	OHS Risk Management	14 Jan 2009	Joe Jones 26 Jan 2009	Completed	28 Jan 2009	Distinction	Joe Jones 03 Feb 2009	Best student in class	Edit

Establish a policy on editing rights

You will need to establish a policy within the organization as to who are allowed to download L&D activities into PDPs, who may approve attendance of such L&D activities, who may sign them off as successfully completed, etc. (system administrators, HR, or managers; or a combination?).

Should employees be allowed to select L&D activities themselves, or should only the manager do so in consultation with the employee?

NOTE: It is easy to monitor who approved or signed off L&D activities, as the name of that person will be recorded by the system, along with the date.

Filtering Views by Competencies

				Lear	ning and I	Development	Library			
L&D Library	Setup PDP Setup	nmont Cotog	orioc							
A. Lean	ing and Develo	pillent Categ	ones				\frown		Clink "Cloor	
			Filter	Dis	continued Items:	• Exclude • Include	Apply Filter	Clear Filter	Filter" to	
	Make		L&D Item:	All L&D Items	Provider:	All Providers	Competencies:		remove	
	selection from dro	p	No/ID:	All Item No/IDs	Target Group:	All Target Groups	Risk Orientation Role Development Safety Certification	*	previous search	
	downs			You can sele	ct multiple Competen	cies by using your CTRL key	Sales Skils Sarbanes Oxley Self-Control	(E) •	parameters	
					13	results returned				
o add a ne xamples: Ma	ew L&D Category, <u>Clic</u> anagement Training, Custo Skills	: <u>k Here</u> mer Service Training,	Technical T	raining, OH&S Tra	ining, etc.					
Fo add a n	ew L&D Item/Activity for	r this Category, <u>Clic</u>	k Here	510				\		
1.1 Princ	iples of Partnership S	elling	Edit Delet	te Activity	e 🔘 Inactive 🔘 Di	scontinued				
No/ID	Provider	Duration	Target	Group	Brie	f Description			Key Competencies	Details
Module 1 Partnering	Insights For Performance External	3 Hours	 Sales 	Staff	The F is to t custo market	Partnering Module is one of seven teach the sales rep how to bridge imers' needs, while determining h etplace and create financial stabil	3 hour modules. The your company's offer ow to maintain a stro ity. To learn more go	Program Purpose ings and your ng presence in the to	 Sales Skills 	<u>View</u>
					www.	insightsforperformance.com >> s	ales training			

Competencies

A combination of competencies can be selected (by holding down your CTRL key), to find all L&D activities that cover all selected competencies.

EXAMPLE: If you select the competencies LEADERSHIP and BUSINESS THINKING, and click "Apply Filter", all L&D activities covering both competencies will show in the report. Those L&D activities with only ONE of the two competencies will not show.

Visibility - L & D Module Links/Pages

With this module activated, you will find the following additional dropdown menu links and pages:

L&D Library Set Up pages

CorpAdmin Home							
	Home	System Admin					
		Units					
	ornor	Locations					
	orpor	Job Titles					
		Ad-Hoc Categories					
	Current	System Settings					
	System 9	Performance Periods					
	Corporat						
	Perform	Auto Emails					
	Perf Yea	Bulk Emails					
	License F	L&D Library					
	I and inc						

CorpAdmin Views

All Employees PDPs page – Filter by All PDP's, Started, Not Started, Locations, Units, Managers, Job Titles or specific Employees

Pers	onal	Development Pl	ans					Weld	ome Joe Jones	Access privile	ges: <mark>CorpAdr</mark>	nin) DivAdmin	Appraisor	Appraisee
Ho	me	System Admin	Users	Appraisals	PDPs	Reports	Tutorials							Sign Out
					↗									
				Emp	oyee P	DPs								
				Filter					Apply Fil	ter 🚺 Clear Filter	1			
				Option	s All PDP	8	~	Manager	All Managers					
				Period	Not Ap	plicable	~	Job Title	All Job Titles	1	•			
				Locatio	Al Loca	ations	*	Employee	All Employees		*			
				Unit	All Unit	5					,			
26 re	sults r	eturned											Export to S	preadsheet
N	lo	Employ	ee		Job Ti	itle			Unit		Location	Sta	tus	PDP
	1	Bean, Connie		Accountant			Accountin	ng		Bost	on	Started 26 Jan	2009	View
	2	Beaumont, John		Branch Man	ager		Operatio	ns->Stores->	London Branch	Aud	dand	Started 27 Jan	2009	View
	3	Bell, Jan		Payroll Cler	k		HR->Pay	roll		Bris	ane	Started 26 Jan	2009	View
<u> </u>	4	Bocock, Susan		Office Mana	ger		HR			Melb	ourne	Not Yet Started		View
	5	Bracs, Jenny		Accounting	Clerk		Accountin	ng->Accounts	Payable	Pert	h	Started 01 Jun	2009	View
	6	Dobson, Dirk		Ops Manage	r		Operatio	15		New	York	Started 27 Feb	2009	View
	7	Dodds, Sharon		Branch Man	ager		Operatio	ns->Stores->	Sydney Branch	Syd	ney	Started 27 Jan	2009	View
1	8	Dunn, Bill		Driver			Operatio	ns->Warehou	50	New	York	Started 27 Jan	2009	View
1	9	Dutton, Shelley		Sales Rep			Marketin	2		Melt	ourne	Started 02 Jul 2	011	View
	0	Franklin, Bob		Sales Ren	-		Marketin		A A A	Bost	on	Started 26 Mar	200	View



A PDP link on the Appraisal Manager and Compass 360 Appraisal Manager pages:



PDP Links inside some system pages (where they are most likely needed to open someone's PDP):

• On the Appraisal Summary/POP page



• On the Multiraters page

Multirater Reports			
Avg Rating-Rater Gp	Rating-Self	Repo	orts
nry	nry	<u>Graphical</u>	<u>Narrative</u>
	-	Personal D	Development Plan

On the Compass360 Individual Reports page

Reports						
	<u>Graphical</u>	<u>Narrative</u>				
Jump-to-360-Raters-Page						

L& D Management System Reports



PDP Status

Γ		PDP S	tatus						
		Filter				Ap	ply Filter Clear	Filter	
		Options	All L&D Items (Current & Completed)	 Mana 	ger All Manage	rs		~	
		Period	Not Applicable	🗸 🗸 Job T	itle All Job Title	es		~	
		Location	All Locations	 Emple 	All Employe	ees		~	
		Unit	All Units					~	
26 re	sults returned								Export to Spreadsheet
N	D Employee		Job Title	Current L&D Items	No Due Date	Overdue	Unapproved	Completed L&D Items	PDP Last Edited
1	Bean, Connie PDP		Accountant	4				1	Jones, Joe 03 Feb 2009
2	Beaumont, John PDP		Branch Manager	5	1		1	1	Dobson, Dirk 27 Jan 2009

L&D Status

	L&D Status												
		Filter	Disco	Discontinued Items: O Exclude O Include Apply Filter Clear Filter						ar Filter			
		Options	Current L&D	items	*	Manag	er All Mana	gers		*			
		Period	Not Applicable	2	~	Job Tit	le All Job Ti	tles		~			
		Location	All Locations		~	Employ	vee All Emplo	yees		~			
		Unit	All Units							*			
		L&D Item	Transformatio	nal Leadership		Status	atus All Status Options			*			
		Target Gp	All Target Gro	ups	*	Attainn	nent All Attain	ment Options		*			
7 res	ults returned										Export to	Spreadshee	t
No	Employee	Job 1	Job Title L&D Item Due Date Approved Status Completed Attainment Signed Off										
1	<u>Bean, Connie</u> PDP	Accountant		Transformational <u>Details</u>	Leade	rship	27 Feb 2009	26 Jan 2009	Enrolled				
2	Pound, Peter PDP	Accounting C	lerk	Transformational	Leade	rship	31 Jul 2009	26 Jan 2009	and the second	Logat and Andreas	Ļ.		

L&D Statistics

	L&I	D Sta	itistics						
	Filt	ter	Discontinued Item	15: • Ex	clude 🔾 Inc	lude (Apply Filter Clear Filter		
	Optio	ions	Current L&D Items	~	Manager	All Managers	~		
	Perio	iod	Not Applicable	~	Job Title	All Job Titles	*		
	Loca	ation	All Locations	~	Employee	All Employees	*		
	Unit	t ,	All Units				*		
	L&D	Item)	ALL L&D Items		Status	All Status Options	*		
	Targ	get Gp	All Target Groups	*	Attainment	All Attainment Options	*		
12 result	s returned							E	Export to Spreadsheet
No	L&D) Item		No of E	mployees	Percentage A	Percentage	B L	&D Item Details
1	Basic Supervisory Skills				1	33% (of 3)	4% (of 26)	View
2	Customer Service Excellence	e			11	85% (of 13)	42% (of 26	5)	View
	manadate Salar		and the second s	- setter	Sand Sand	A 450 13.	and a presence (com		A CONTRACTOR OF THE OWNER OWNER OF THE OWNER OWNE

Historic Data: All reports have a HISTORY dropdown selection under OPTIONS in the filter to view completed L&D Items:



The Learning and Development Cycle Graphical View





TALENTPEAK™ JOB DESCRIPTION BUILDER

Marketing Video Link>> http://www.talent-peak.com/jdbuilder.html

Creating the Job Descriptions from the Template Manager

Step 1. Open the JD Template Manager by clicking the following link (see arrow below) on the Template Manager page:

Job Title Appraisal Templates To go to the Job Description Template Manager g	click here					
You have 1/12 templates in your system						
Job Title	Job Descriptions	Template Exists?	Last Edited	Last Edited By		T-Lock
Accountant	JD - Edit JD - View	No	1 Jan 0001		Create	
Branch Manager	JD - Edit JD - View	No	1 Jan 0001		Create	
CEO	JD - Edit	No	1 Jan 0001		Create	

Step 2. Enter the names of Header Fields (as many as you like) (see arrow 1 below). They will be the same for all Job Descriptions.

Step 3. Enter the title of what you want to call your Job Performance Categories (e.g. Key Performance Areas, Key Result Areas, Focus Areas, etc.) (see arrow 2 below). Study the detailed JD Setup Tutorial at the bottom of the JD Template Manager page.

Job Description Template Manag	er
To create a new Header Field, <u>click here</u> Current Header Field Titles	
Job Purpose Key Relationships Direct Reports Qualifications & Experience 1	
With selected: ↑↓×	
Enter your option here: Key Performance Area	<u>Save / Edit</u>
TUTORIAL 1: JOB DESCRIPTION TEMPLATE MANAGER	Summer and with

Step 4. Now click JD Edit (see Template Manager Screenshot below) for each individual Job Title to add its unique Job Description contents (see Sample Job Description page 4). Any number of Performance Measures and standards per Job Performance Category can be added. When downloading Competencies, remove those behavioral Indicators not relevant to the specific Job Title/Position – if any (and add additional ones if necessary).

Operations Manager	JD - View JD - Edit JD - View	No	1 Jan 0001		Create	
Payroll Clerk	JD - Edit JD - View	Yes	7 Jun 2006	Karin Miller	Edit Template Preview Delete	
Recruitment Officer	JD - Edit JD - View	No	1 Jan 0001		Create	

Step 5. After entering the Job Description's contents, click JD View to see what the final product looks like.

	JD - View					
Operations Manager	JD - Edit JD - View	No	1 Jan 0001	Cr	reate	
Payroll Clerk	JD - Edit JD - View	Yes	7 Jun 2006	Karin Miller Edit T Pro De	emplate eview elete	
Recruitment Officer	JD - Edit JD - View	No	1 Jan 0001	Cr	eate	

See Example below:

Job / Role Description						
Job Title: Payroll Clerk U Reports to: HR Manager La	nit/Subunit: L1: Human Resou ast edited by: Karin Miller	rces L2: Administration L3: Payroll Date last edited: 07 Jun 2006				
Job Purpose • To ensure accurate and up	-to-date pay records, and that ι	all staff members are paid on time.				
Key Relationships • Internal with all staff memi • External with Payroll Softw	bers. are Vendor					
Direct Reports • None						
Qualifications & Experience • Suitable tertiary diploma a	nd minimum 1 year Payroll Cler	k experience				
Key Performance Area	Performance Meas	ures				
Remuneration Administration Processing of Weekly, Bi-Monthly and Monthly salary/wage runs.						
	Performance Standa	rds on time, accurate and error-free				

PLEASE NOTE:

- Performance Measures and Standards (incl. Competencies) can be transferred from a Job Description to its corresponding
 Job Title Appraisal Template; one at a time or all in one go (select a default Rating Key first if you want to use the same
 Rating Key for all measures -- to ensure it gets automatically added to all measures in the Appraisal Template).
- You may not necessarily want to copy ALL Performance Measures from Job Descriptions to Appraisal Templates, but only the most important ones so as to limit the number of measures (including Competencies) to maximum 12 to 15.
- TIP: copy all measures to the Appraisal Template and then delete the less important ones there if you like to.
- It is recommended that the development of Job Descriptions be first done on "paper" (e.g. MS Word), and then copied and pasted into TalentPeak (JD Edit). Sometimes it may be necessary to copy from Word and then into Notepad to clear out any hidden characters prior to pasting onto the webpage template. (*Please contact IFP support if having difficulties*)
- Performance Measures (including Competencies) can, alternatively, be created directly in Appraisal Templates (without going via Job Descriptions).
Uploading Job Descriptions

Optionally, you can Upload Job Descriptions inside the Job Description Builder which are only viewable from a download link. This is acceptable **if** your Job Descriptions do <u>**not**</u> have specific competencies on the JD pertaining to each specific role. If you want the Job Description to be viewed along with the appraisal agreement, than copy/paste each one into the system as previously described.

ew	Job Title:	Director of HR	Reports to:	None 👻
	Unit/SubUnit: L1			
	L2		Last edited by:	Ron Hiller
	L3			
			Date last edited	: 01 Apr 2011
	Attachments:			

Copy Job Descriptions to other Job Titles

Copy the contents of thi	is JD Edit page to another Job Title JD Edit page
This functionality allows you the target JD Edit page	u to quickly and easily copy the contents of this JD Edit page to another selected one. Once copied, you can still edit the contents of
Select the Job Title that you HR Manager	u wish to copy this JD Edit page TO:

The drop down above is pulling from the job titles you have entered under the System Admin settings.

Sample Completed Job Description View from Template Builder

(web-page view)

Your Company Name's Site: Ben616 (180)

Click to print

Job Title: Payroll Clerk	Unit/Subunit: L1: Human Resources L2: Administration L3: Payroll	
Reports to: HR Manager	Last edited by: Ben Smith	Date last edited: 15 Feb 2008

Job / Role Description

Job Purpose

• To ensure accurate and up-to-date pay records, and that all staff members are paid on time.

Key Relationships

• Internal with all staff members. External with Payroll Software Vendor

Qualifications & Experience

• Suitable tertiary diploma with 1 year minimum Payroll Clerk experience

Key Performance Areas	Performance Measures		
Remuneration Administration	Processing of Weekly, Bi-Monthly and Monthly salary/wage runs		
	Performance Standards		
	Pay slips done on time, accurate and error-free		
	Liaising with Accounts Department		
	Performance Standards		
	 Ensure pay runs are checked by senior member of the Accounts team prior to payment Liaise with Account Manager re the necessary payments to be made into employees' bank accounts 		
	Inland Revenue returns and payments		
	Performance Standards		
	• Filing and payments done by 20th of each month		
	General Ledger		
	Performance Standards		
	 Generate the journals from reports for each pay run to be posted to the general ledger 		

	Reconcile payroll expenses each quarter to the general ledger		
	Budgeting		
	Performance Standards		
	 Remuneration projections for following year submitted to HR Manager by 30 November of each year 		
	Reporting		
	Performance Standards		
	 Monthly Reports (standard agreed layout followed) to reach HR Manager by 20th of each month Reports include details on serious deviations from set budgets Ad-hoc reports filed as dictated by circumstances 		
Employee Records	-		
	Liaise with HR to ensure all new employees are processed on a timely basis		
	Performance Standards		
	 All relevant documentation completed accurately Processed within 2 working days of joining 		
	Processing terminations		
	Performance Standards		
	 All relevant documentation completed accurately Done two working days prior to employee leaving company 		
Professional Development	Self-Development		
	Performance Standards		
	 Keep up to date with latest developments in specialist field by reading specialist literature Attend at least one relevant conference per year on employee remuneration Attend short courses on employee remuneration as agreed with HR Manager 		

Examples Below of Job Descriptions that have role specific competencies added:

COMPETENCIES

Accuracy

Works with a high level of precision. Holds self to rigorous standards. Is careful to double-check work. Follows work processes exactly.

Administrative Skill

- Is effective at keeping records.
- Prepares documents with care and attention.
- Can retrieve information quickly.
- Helps improve administrative processes.
- Diligently follows organization policies and procedures.
- Prioritizes tasks effectively.
- Is highly organized.
- Is good at multi-tasking.
- Keeps information confidential.

Customer Service (Internal)

- Builds effective internal customer rapport and relationships.
- Takes a genuine interest in customers.
- Shows energy and enthusiasm in satisfying customer needs.
- Tends to over-deliver, rather than over-promise.
- Excels at providing excellent customer support and follow-up.
- Responds to customer inquiries and complaints promptly.

Marking Job Descriptions Completed & Releasing to Staff

Navigate to the top of the JD Edit page and tick the box "Mark as completed" to release the Job Description



The links on the Template Manager page now turn blue, as a visual indication that it has been completed, so the rest, still to be completed, can be easily identified...

- Boost in templetes (to copy beloait hading hey te)				
You have 22/22 templates in your system				
Job Title	Job Descriptions	Template Exists?		
Accountant	JD - Edit JD - View	Yes		
C Accounting Clerk 1	JD - Edit JD - View	Yes		
Appraisor Level 1	JD - Edit JD - View	Yes		
Appraisor Level 2	JD - Edit JD - View	Yes		
Bottle Washer	JD - Edit JD - View	Yes		

Job Descriptions **not marked** as completed will not be viewable on the Appraisal Manager page. Clicking the link will trigger the following alert:

	Message	from webpage	×	
page,		This Job Description has not yet been released as completed by	<u>Status</u>	Export to Spreadsheet
(Billy				Job Description Agreement Perf Record
		ОК		Appraisal Summary / POP PDP Undo Sign Off
				Job Description Job Description Agreement Perf Record

This gives you full control as to when to release your Job Descriptions to managers and staff.

Export your Job Titles to Excel

For easier reference you can now export to Excel all of your job titles



TALENTPEAK™ MULTIRATER MODULE

Marketing Video Link>> http://www.talent-peak.com/multirater.html

What is the Multirater Module?

The Multirater Functionality allows you to, as part of the "regular" and/or "ad-hoc" Performance Appraisals, request up to FIVE "other" (Multi-) raters to provide input to an employee's performance.

This functionality is highly suitable for matrix organisations, but also if you have employees who work with (or have worked with) more than one manager/supervisor during a performance period.

Such Multiraters are notified by a system-generated email to log into the system, and to complete the online Appraisal Questionnaire of the Appraisee.

The input of all Multiraters appears jointly on two system-generated reports:

- A Narrative Report that combines the (averaged) ratings and written comments of all Multiraters onto one page.
- A Graphical Report that presents the results as FOUR different types of Bar Charts.

The direct line manager of the employee can be included as another Multirater, so his/her input can get added to those of the other Multiraters as well.

Appraisees can be requested to complete a Multirater Self-Appraisal as well. The two reports, mentioned above, will then reflect how the Appraisee's ratings and comments compare to those of the other Multiraters jointly.

Managers (Appraisors) will then be able to view these comprehensive results in preparation of the Appraisal Interview and/or to base the completion of the Official Appraisal Form on.

Please note: The Multirater Functionality is totally different from the Compass360™ System.

Multirater and Compass 360 Comparison

What is the difference between the Multirater and the Compass 360-Degree Feedback?

Multirater	Compass 360-Degree Feedback
Forms part of "regular" or "ad-hoc" performance appraisals, needs to be activated or enabled as an option. (Contact IFP)	Separate from "regular" or "ad-hoc" performance appraisals. Can be activated as an add-on module, or used as a fully independent, "stand-alone" system.
PRIMARY PURPOSE: To get input on an employee's work output/performance, from all managers (incl. project managers), supervisors and team leaders an employee has worked with during a performance period. (Could be used as input into employee performance-based remuneration.)	PRIMARY PURPOSE: To get input on an employee's work behaviour and competence as perceived by significant "other" people the employee has worked with over the performance period - for the purposes of employee development, and personal self-awareness & growth. (Should preferably not be used as input into performance- based remuneration.)
The performance measures to be assessed by all Multiraters are the same as those in the Appraisee's Performance Agreement (regular or ad-hoc appraisals).	An unlimited number of 360 Questionnaires can be created for any number of 360 target groups or purposes.
Multiraters are selected from internal employees only.	Multiraters can be external as well, e.g. external customers.
Up to 5 Multiraters per appraisal are allowed (Appraisee self-appraisals excluded).	Up to 20 Multiraters per 360 appraisal are allowed (Appraisee self-appraisals excluded).
When activated, the Multirater functionality is automatically available for all employees, with every performance period (one per performance period with regular appraisals, but any number with ad-hoc appraisals).	360 Appraisals are individually created for selected employees as required (more than one per employee per performance period can be created).

What is the difference between Regular and Ad-Hoc Multirater Appraisals?

Regular MULTIRATER Appraisals	Ad-Hoc MULTIRATER Appraisals
You can create one Multirater Appraisal per Appraisee per performance period.	You can create any number of Multirater Appraisals per Appraisee per performance period.
The performance measures to be assessed by all Multiraters are the same as those in the Appraisee's regular appraisal Performance Agreement.	The performance measures to be assessed by all Multiraters are the same as those in the Appraisee's ad-hoc appraisal Performance Agreement, but these measures can be customized for diverse and specific purposes, e.g. 90- Day Probation, Promotions, and Performance Improvement, as well as Direct Report, Peer and Internal Customer Feedback (i.e. "mini" 360s limited to five Raters; one Rater Group per Multirater Appraisal).
Multiraters should be current or previous line or project managers the Appraisee has worked with during a performance period.	Multiraters could be line or project managers, direct reports, peers or internal customers the Appraisee has worked with during a performance period.

Creating a Multirater Appraisal

With the Multirater Module activated, the following tick-box will show on the Performance Agreement Form ("Agreement" link) of Appraisees:

Agreement Pr	eview	Make changes to the fields below as needed, then press the Save button at the bottom of this panel
Last Edited	Dan Peterson	Notes
Created	3 Feb 2011	
Appraisee	<u>Bell, Jan</u>	Appraisal Date 18 Feb 2011
Appraisor Perf Period	<u>Dan Peterson</u> 1 Jul 2010 - 30 Jun 2011 (current)	
Activate M	ultirater Functionality	
Previous Ap	praisal	Update Matching Measures From Appraisal Template

By ticking this box, a new link will appear for the employee on the Appraisal Manager page, called 'MULTIRATERS'.



And by clicking this MULTIRATERS link, the following page will open:

Multirater Appraisal Page

	aisee Information						
Name	: Jan Bell		Job Title:	F	ayroll Clerk		
ocati	ion: New York		Unit:	H	IR		
lulti	rater Appraisal Infor	nation					
ppra	Dan Peterso	n	Appraisor Job Title:	F	IR Manager		
ert F	Period: 1 Jul 2010 -	30 Jun 2011	Due Date:	1	.8 Feb 2011		
lick	the Open Multirater Sel	ctor button on the right to a	dd Raters for this Appraisee.		 Open Mu 	itirater Selec	tor >>
No	Appraisal Type	Rater	Email Address	Send Notification	Status 0/0	View	Remove
To send all Rater Notifications (at the same time), <u>click he</u> <u>Preview Email Notificatio</u> B) Self-Appraisal by Appraisee Jan Bell elf-Appraisals allow the Appraisee to compare his/her ratings against the averaged ratings of the Rater Group - to identify gaps in perception and areas for ttention and improvement.							
B) S	Self-Appraisal by App ppraisals allow the Appr ion and improvement.	raisee Jan Bell	ngs against the averaged ratings of the R	Rater Group - to identify g	aps in percepti	on and are	as for

Assign Multiraters

Click the **Open Multirater Selector** button (see red arrow in above screenshot), to open the following page:

and the second second and the second		at man and the second the second the second			
Now assigning Raters for: Jan Bell					
o preview the Multirater Appraisal Measures, <u>click here</u>					
 You can have up to FIVE Raters per Multirater Appraisal (Appraisee self-appraisal excluded). The direct line manager of the Appraisee can also be selected as a Multirater if you want to include his/her feedback along with that of the other Raters. Only select Raters whom the Appraisee has worked with sufficiently long to be able to give useful feedback. Once you have added the first Rater, the Appraisee's Performance Agreement will be locked so that the Measures and Standards cannot be edited, as without their exact match in all Rater questionnaires and Appraisal Forms, a report cannot be generated. If the Agreement needs to be changed, then remove all the existing Raters first. That will unlock the Agreement. 					
	Available Raters	Selected Raters			
	Last name starts with Search				
<u>Multirater Quick Status</u>	Anis, Ann Appleton, Zoe Beaumont, John Bracs, Jenny Brown, Frank Dolina, Donna Dutton, Shelley Franklin, Bob Hartley, Bobby Hopper, Don Peterson, Dan Smith, Lesley Soap, Joe Williams, Lisa	-> ove			
And the second second	Mar James and	Add Raters Cancel			

All **internal users/employees** will show in the "Available Raters" field – to select from as Multiraters for the employee (please follow the instructions).

The Raters (once added) will show in a table as follows:

No	Appraisal Type	Rater	Email Address	Send Notification	Status 0/4	View	Remove
1	Multirater: Other	Beaumont, John	john@company.com	Send Email Not Yet Sent Send Reminder Not Yet Sent	Not Started	View	Remove
2	Multirater: Other	Bracs, Jenny	jenny@company.com	Send Email Not Yet Sent Send Reminder Not Yet Sent	Not Started	View	Remove
	A market and the second			Send Email Not Xet-Sent			

The **Appraisee Self-Appraisal** shows in a separate table on the same page. It is optional to require the Appraisee to do a Self-Appraisal via the Multirater functionality. Companies need to decide whether employees should complete this, or just the Appraisal Prep Form (or both).

(E	s) :	Self-Appraisal by Appra	ul VV (Changend Chan iisee Jan Bell	and the second of the second and a second of the	and the second s	~~~/~~~,		
Se att Mi	lf-A ent ulti	oppraisals allow the Apprais ion and improvement. irater: Other To create ar	see to compare his/her rati n Appraisee Self-Appraisal	ngs against the averaged ratings of the Rater (for this Appraisal Type, <u>click here</u>	Group - to identify g	aps in perceptio	on and are	as for
N	o	Appraisal Type	Appraisee	Email Address	Send Notification	Status 0/1	View	Remove
					Send Email Not Yet Sent			
: :	L	Multirater: Other	Bell, Jan	Jan@company.com		Not Started	View	Remove
Ч	ام	and the second		and the second	Send Reminder		A sures	ليريميني

Email Notifications

Next, click the links as indicated to send the email notifications to the Multiraters.

Multirater Completion of the Appraisal Questionnaire

Multiraters go to their **Appraisee Role**, and select **Appraisals** >> **Multirater Apps TO DO** (their email notification will have detailed instructions plus a hyperlink (new from May 2012) that opens the questionnaire directly without havening to log into the system).



Multirater Appraisals TO DO

There are two types (follow the detailed instructions):

- Colleague Appraisals
 - Self-Appraisals

Perf Period 13a 2011 - 3: What is a Multirater Av Colleague Appraisals - The following of your c - Please click 'Appraise' - If you were unable to - If you do not have tim - Once you have signed until such time as all M - Please complete the ag - Please - Please	1 Dec 2011 (currer ppraisal? colleagues have ' to proceed with observe the Ap ne to complete a off the apprais ppraisals by the lock Title	t been assigned to h your Multirater fe praisee in respect an entire appraisal al questionnaire, y sals for an employ a due dates indicato	you for appra edback for th of a specific r in one sitting, ou will not be ree have beer ed.	aisal. neasure, s , just click able to ma n complete	elect the rating ('Save Progress' ake changes to i d).	option 'Unable or 'Save and t again, but y	to rate; N/ Complete L ou can ask
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Person to Appraise Bell, Jan P	Job Title						
Bell, Jan P	JOD HILE	Appraisal Type	Due Date		Status	1	
	Payroll Clerk	Multirater: Other	21 Jan 2011	No	ot Started	Appraise	
Blake, Jane P	Payroll Clerk	Multirater: Other	10 Mar 2011	Complete	ed: 10 Mar 2011	Appraise	
Mills, Bobby T	Fraining Officer	Multirater: Other	31 Dec 2011	In	Progress	Appraise	
Self-Appraisals • You have been assigne • Some of your colleagu • Your appraisals of you you can take the nece: • If you do not have tim • Once you have signed until such time as all M • Please complete your s	ed to do the sel ues (e.g. manag urself will be cor sesary steps to i ne to complete a d off the apprais dultirater apprai self-appraisals	f-appraisals listed i gers and supervisor mpared to their app mprove in these a an entire self-appra al questionnaire, y isals for an employ by the due dates in	below. rs you have w oraisals of you reas. aisal in one sit ou will not be ree have beer ndicated.	vorked with u, so that t tting, just o able to ma complete	n during this peri he differences ir slick 'Save Progr ake changes to i d).	formance per n perception c ress' or 'Save t again, but y	iod) were a an be ideni and Compl ou can ask
Person to Appraise	Job Title	Appraisal Typ	De D	ue Date	Status]
Bean, Connie A	Accountant Mult	tirater: MR - Peer F	eedback 31	Dec 2011	Not Started Se	elf-Appraise	

Bulk Manage Multirater Appraisals

TalentPe	eak									
Bulk-Mai	nage Multirater	Appraisa	ls						Welcome Ron Hiller	Access privileges: CorpAdmin
Home	System Admin	Users	Goals		PDPs	Reports	Tutorials			
				Appraisal Manag	ger					
				Create New App	praisal	_				
				Buk-Create App	praisals	🗤 🍳 Perf (Cycle 2: Annually	,		
				Buk-Manage M	R Appraisals				Apply Filter Clear	Filter
						als	-	Туре	Regular Appraisals	•
				360 Appraisal M	lanager	1 - 31 Dec	2011 (current)	Job Title	All Job Titles	•
				Create New 360	0 Appraisal	ns	-	Appraisee	enter 1st few letters of first/last name	
				Buk-Manage 36	50 Appraisals	ct				•
				Template Mana Send ren None 🔻	ger Ininders from days, until ff the apprai	ninders None da questionnaire sal	ys before the a is signed off o	opraisal date, the appraise	every Send All Initial Emails NO Send All Reminders NOV	w N

You can manage Multirater Appraisals in bulk, follow the instructions provided:

		• Perf Cycle 1: Q	Quarterly 🔘	Perf Cycle 2: Annually				
		Filter			Apply Filter Cl	ear Filter		
		Options All Ap	ppraisals	▼ Type Regular /	Appraisals	-		
		Perf Period 1 Apr	r 2012 - 30 3	Jun 2012 (current) Job Title All Job T	itles	-		
		Location All Lo	cations	 Appraisee enter 1st 	few letters of first/last name			
		Unit All Un	nits			-		
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		off the appraisal	nui questioni	naire is signed on or the appraisor has signed			send bu	ittons
				2 results returned				
1. 0	D'Keefe, Denni							
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					Send Email			
	1	1			Sent: 26 Jul 2012		1	
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2 (B) S No 1 (A) N No 1	Multirater: Other Appraisal Sity Appra Appraisal Title Multirater: Other Kbblis, Adam kbb.Tila: Programmer kinit: Appraisal Title Multirater: Other	Black, Billy Black, Billy See O'Keefe, Den Rater O'Keefe, Denni HR->Administration Abbis, Adam Rater Adams, Jenny	n Location	1 appraisal-smart.com Email Address Lagappraisal-smart.com To send Initial Email Notifications to To send Reminder Email Notifications to Sto Sydney Email Address 9@appraisal-smart.com	Send Reminder Sent: 29 Jul 2012 Send Email Send Final Send Rotification Send Sent: 20 Jul 2012 Send Reminder 20 Jul 2012 Bend Reminder Jul 2012 Send Reminder 20 Jul 2012 Send Reminder 23 Jul 2012 Send Email Sent: 23 Jul 2012 Send Email Sent: 23 Jul 2012	Not Started Status 0/1 Not Started Appraisee (at he Appraisee (at he Appraisee (at local Status 2/5 Not Started	View View View View View View View	Remove Remove Remove Remove Remove Remove Rating Avg: Remove Remo
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2 (B) S No 1 (A) N No 1 2 (A) N	Multirater: Other	Black, Billy Black, Billy See O'Keefe, Den Rater O'Keefe, Denni HR->Administration Abbis, Adam Rater Adams, Jenny Angel, Andy	n Location	10 appraisal-smart.com Email Address Comparisal-smart.com To send Initial Email Notifications to To send Reminder Email Notifications to a Sydney Email Address 90 appraisal-smart.com 240 appraisal-smart.com	Send Reminder Sent: 29 Jul 2012 Send Final Send Final Sent: 26 Jul 2012 Send Final Sent: 26 Jul 2012 Send Reminder 29 Jul 2012 all Raters above, incl. to t all Raters above, incl. to t Due Date: 12 : Send Reminder Sent: 23 Jul 2012 Send Reminder Sent: 23 Jul 2012 Send Reminder Sent: 24 Jul 2012 Send Final	Not Started Status O/1 Not Started he Appraisee (at he Appraisee (at he Appraisee (at Not Started Not Started Not Started	View View View View View View View	Remove Re
2 (B) S No 1 2. A 2 (A) N No 1 2	Multirater: Other Appraisal by Appra Appraisal Title Multirater: Other Multirater: Other Multirater: Other Multirater: Other	Black, Billy Black, Billy See O'Keefe, Den Rater O'Keefe, Denni HR->Administration Abbis, Adam Rater Adams, Jenny Angel, Andy	n Location	10 appraisal-smart.com Center of the second	Send Reminder 29 Jul 2012 Not Yet Sent Send Final Send Rotification Send Email Sent: 20 Jul 2012 Send Reminder Sent: 20 Jul 2012 all Raters above, incl. to t Jule Date; 12 J Send Rotification Sent 23 Jul 2012 Send Rominder Sent: 23 Jul 2012 Send Rominder Sent: 23 Jul 2012 Send Rominder Sent: 23 Jul 2012 Send Rominder Sent: 23 Jul 2012 Send Rominder Sent: 24 Jul 2012 Send Email Sent: 24 Jul 2012 Send Email Sent: 24 Jul 2012 Send Email Sent: 24 Jul 2012	Not Started Status O/1 Not Started Not Started Not Started Not Started Not Started	View View View View View View View View	Remove

Sample Auto Email Reminder

Automated email reminders are sent out overnight according to your settings in the filter, with a report sent to the CorpAdmin, as per the following example:

Subject: Multirater Reminder Email Notification Report
Dear Don Munro
This is a report of the Multirater reminders sent out on 13 Aug 2012:
36 Reminder email notifications were sent out successfully. 2 Reminder email notifications could not be sent due to invalid email addresses of Raters. View the Bulk-Manage MR Appraisals page to see who they are (red-shaded rows).
Multirater auto reminders will automatically stop after 30 days from an appraisal due date to prevent continuous notifications being sent out should an appraisal be unduly delayed (or never done). Set a new due date for such appraisals for the auto reminders to resume.
Logon page: https://www.talentpeak.net
NOTE: This is a system-generated email, so please do not reply to it. Please contact your appraisal system vendor if you have any questions (also if this email was sent to you in error, and you were not the intended recipient).
p.

Multirater Reports

The Multirater Reports can be accessed at the bottom of the Multirater Appraisal page.

	Μ	lultira	nter	Repo	rts						
Rater Group	#Raters-Rater Gp		Avg Ra	ating-R	ater G	p	Ra	ting-Self		Rep	orts
1. Multirater: Other	4			2.8				3.6		Graphical	<u>Narrative</u>
			_							1	1
	Rater Group	Self	RGp	0	1	2	3	4	5		
	1. Multirater: Other	3.6	2.8	3.6 2.8							
				0	1	2	3	4	5		

Report 1: Narrative Report

This report has as primary focus the provision of narrative (qualitative) feedback to the Appraisee

Self: 4 4 2 Rater Gp: 2	 Performance Standards / Behavioural Indicators Is effective at keeping records. Prepares documents with care and attention. Can retrieve information quickly. Eliminates unnecessary paperwork. Is proficient in using office equipment. Helps improve administrative processes.
	 Diligently follows organisation policies and procedures. Prioritizes tasks effectively. Is highly organised. Is good at multi-tasking. Is conscientious about ensuring full-time phone coverage. Is highly skilled at message taking and giving. Keeps information confidential.
What is done WELL? (consider above Pe Self I think I am doing the following particu Diligently follows organisation policies confidential.	rformance Standards/Behavioural Indicators - if any) larly well: Prepares documents with care and attention. and procedures. Is good at multi-tasking. Keeps information
Rater Group Is conscientious about ensuring full-tim	e phone coverage.
Is proficient in using office equipment.	
Is conscientious about ensuring full-tim giving.	e phone coverage. Is highly skilled at message taking and

NOTE: Quantitative ratings serve a purpose (pointing out rating gaps), but without telling Appraisees in text/narrative form more specifically what they are doing **well**, and what **should be improved**, it will have limited value; and may even cause Appraisee anxiety - not knowing what to keep on doing, and what to change.

Report 2: Graphical Reports

FOUR different reports appear on this page. Here are two examples:

Graphical Reports Sample #1



Graphical Reports Sample # 2

Gap Analysis

This report shows the difference in ratings (i.e. the 'gap') between the Appraisee (Self) and the Rater Group for each item. It highlights the Appraisee's 'blind spots' in respect of both over-rating and under-rating.

				Shov	v Standa	ards/Indic	ators	
Measure / Competency / Item	Self	RGp	0	1	2	3	4	5
1. Accountability	4	2.3	1.7					
2. Achievement Drive / Commitment / Dedication	5	3.5	1.5					
6. Initiative / Proactivity	4	2.5	1.5					
5. Functional Expertise	4	2.8	1.2					
8. Work Standards	4	2.8	1.2					
4. Commitment to Continuous Quality Improvement	3	2.3	0.7					
7. Time Management	3	2.3	0.7					
3. Analytical Skill	2	3.8	1.8					
Average	3.6	2.8	0.8					
			0	1	2	3	4	5
				Show	v Standa	ards/Indic	ators	

Three reports on this page have a filter to create dynamic "sub-reports" of any combination you wish. This is extremely useful in analysing Appraisee Strengths and Development Needs – and to use during feedback and coaching sessions with employees.

Report Op	tions
Active Target:	◯Item # ⊙Self ◯RGp
No of Items:	○ All ○1 ○2 ⊙3 ○4 ○5
Order:	⊙ Ascending ○ Descending
Generate	Report Default

Multirater Overall Status Report



A Multirater status report, found under "Reports" where you can monitor how many colleagues (and to whom) a specific user has been requested to give feedback to, plus the status of such multirater questionnaires to be completed by them.

			Multirater St	atus Report				
			Filter Options All Apprai Status All Quest Add Columns for Job Title Uni	sals Typ onnaires Mul Multirater : Location H	e All Appraisals tiraters All Multiraters de MRs not having qu	Apply Filter Clear Filter S S Multirater Quick Status pestionnaires to complete	Quick Status	Report only
7 results returned	No	Appraisee Name	Appraisee Job Title	Questionnaire Status	Appraisal Type	Appraisal Title	Appraisal Date	Export to Spreadshe Appraisor Signed Off
Bean, Connie	1	Blake, Jane	Payroll Clerk	Completed: 10 Mar 2011	Regular	Multirater: Other	10 Mar 2011	Yes: 16 Nov 2011
	2	Mills Bobby	Training Officer	In Progress	Regular			
		11110, 0000)		Introgrado	Regulai	Multirater: Other	21 Dec 2011	Yes: 4 Apr 2012
	3	Bean, Connie (self)	Accountant	Not Started	Ad-Hoc	Multirater: Other Multirater: MR - Peer Feedback	21 Dec 2011 31 Dec 2011	Yes: 4 Apr 2012 No
Multirater	3 No	Bean, Connie (self) Appraisee Name	Accountant Appraisee Job Title	Not Started Questionnaire Status	Ad-Hoc Appraisal Type	Multirater: Other Multirater: MR - Peer Feedback Appraisal Title	21 Dec 2011 31 Dec 2011 Appraisal Date	Yes: 4 Apr 2012 No Appraisor Signed Off
Multirater Beaumont, John	3 No 1	Bean, Connie (self) Appraisee Name Blake, Jane	Accountant Appraisee Job Title Payroll Clerk	Not Started Questionnaire Status Completed: 10 Mar 2011	Ad-Hoc Appraisal Type Regular	Multirater: Other Multirater: MR - Peer Feedback Appraisal Title Multirater: Other	21 Dec 2011 31 Dec 2011 Appraisal Date 10 Mar 2011	Yes: 4 Apr 2012 No Appraisor Signed Off Yes: 16 Nov 2011
Multirater ieaumont, John	3 No 1 2	Bean, Connie (self) Appraisee Name Blake, Jane Bronco, Lesley	Accountant Appraisee Job Title Payroll Clerk Accounting Clerk	Not Started Questionnaire Status Completed: 10 Mar 2011 Completed: 9 Mar 2011	Ad-Hoc Appraisal Type Regular Regular	Multirater: Other Multirater: MR - Peer Feedback Appraisal Title Multirater: Other Multirater: Other	21 Dec 2011 31 Dec 2011 Appraisal Date 10 Mar 2011 20 Oct 2011	Yes: 4 Apr 2012 No Appraisor Signed Off Yes: 16 Nov 2011 Yes: 9 Mar 2011

Multirater Quick Status View



How the Multirater Feedback should be used

Line managers should use the feedback from Multiraters to assist them in completing their Appraisor Prep or the Official Appraisal Form. Although the Narrative Report can be viewed on the MULTIRATERS page, the best way to view the Multirater comments and ratings is to click the "Show Multirater Feedback" link (see below) on the Official Appraisal or Prep Forms.

Agreement Preview	Performance Record Notes	Previous Appraisal	General Notes
Instructions: The App	raisor to enter the result of the appr	aisal interview (as agreed	with Appraisee)
onto this Official Apprais	sal Form.		·····,
The Appraisee can only Appraison bas signed th	e appraisal off on the Summary/POE	P Form	Forms once the
Appraiser has signed th	e appraisal off on the Summary/POF	P Form.	Forms once the
Appraiser can only Appraisor has signed th	e appraisal off on the Summary/POF	P Form.	ance Record Notes
Appraisee can only Appraisor has signed th	e appraisal off on the Summary/POF	P Form.	ance Record Notes
Appraise can only Appraisor has signed th	e appraisal off on the Summary/POF	ack Show Perform	ance Record Notes

This will open the following section with each Performance Measure. Use the Multiraters' feedback as a resource, or even copy and paste selected text from there to the **Actual Performance Notes** or **POP** fields in the Appraisal Form.



Appraisee View

Appraisees (by default) can also view the Multirater Reports from their login, once the Summary/Pop Form has been signed off, but CorpAdmins has the ability to de-activate the MULTIRATERS link on the Appraisee's side if they so wish. (*Done in System Settings*):

Multirater Module
 Hide Appraisee 'Multiraters' link, Ticking this box will remove the MULTIRATERS link from the Appraisee logon. The default (i.e. UN-ticked) allows the Appraisee to view the Multirater Narrative and Graphical Reports on Appraisor appraisal signoff (individual Multirater feedback will still be hidden).
Hide the VIEW column on the MULTIRATERS page (to prevent the viewing of individual Multirater feedback).
✓ Hide the Decline Selector on the Multirater Questionnaires
Activate Questionnaire Comments-Force Feature (select one of the two variations below):
• For ratings 1 & 2 only ("What could be improved?")
○ For ratings 1 & 2 ("What could be improved?") AND ratings 4 and 5 ("What is done well?")

Consider the other settings (see above) as well to tailor the module to suit your preferences.



TALENTPEAK COMPASS 360™ SYSTEM

Marketing Video Link>> http://www.talent-peak.com/compass360.html

Compass360[™] Comparison to Other 360 Systems

Most 360-degree feedback systems use the same set of around 25 to 100 questions for ALL Rater Groups (e.g. Manager/s, Peers, Direct Reports, Customers). The problem with that is that from each Rater Group's unique perspective (context), a certain portion/percentage of these questions will not be relevant, e.g. how well can a PEER answer questions about customer service (especially external customer service), or a CUSTOMER about teamwork?

Most systems try to overcome this problem by using very generic questions - to fit all Rater Groups - but with potentially equally generic and bland results.

The **context-targeted technology** of Compass360 enables highly targeted question sets for each individual Rater Group - covering its unique working relationship and involvement with the employee, e.g.:

- PEERS: Questions about teamwork (and related).
- CUSTOMERS: Questions about customer service (and related).
- MANAGER/S: Questions about the employee's job competence and behaviours.
- DIRECT REPORTS: Questions about the manager's management style and practices.

Compass360 allows 20+ raters (no upper limit) per 360 Appraisal. Below are examples of how these can be distributed in practice:

Educational Institutions:

- Student feedback: 5 to 50 raters (questions about classroom presentation, student relations, etc.)
- Peer feedback: 3 to 10 raters
- · Principal/Dean & Department Head/s feedback: 1 to 10 raters

Other Organisations:

- Peer feedback: 3 to 10 raters
- Direct Report feedback: 3 to 10 raters
- Line Manager feedback: 1 to 5 raters
- Customer (internal or external) feedback: 3 to 20 raters

(The above are examples only, as any number of raters per Rater Group and 360 can be assigned)

The number and types of Rater Groups will depend on who you want feedback from, and can therefore be different combinations for your employees (360 feedback recipients) - leading to additional flexibility in the use of the system).

As mentioned above, question sets for each Rater Group are highly context-targeted towards that Rater Group, based on their unique working relationship and involvement with the employee.

This leads to dramatically more useful and actionable feedback for the Appraisee, with resultant hugely enhanced behaviour and performance improvement.

Please note: Compass360 is unique in respect of its context-targeted technology, but it also provides the standard 360 option of one set of questions/competencies for all Rater Groups.

Compass360[™] Appraisal Units

Compass360 Appraisal Units are priced and purchased per unit, appearing on the **CorpAdmin Home Page** as indicated in the screenshot below (**used/total**):

Current System Setting	IS
System Settings	
Corporate Administrator	Bob Small
Performance Cycle 1	Annually
Perf Year Start Month	January
License Period	25 Sep 2006- 31 Dec 2013
User Licenses	22/ 50
360 Appraisal Units	83/ 200

A 360 Appraisal Unit equates to one 360 appraisal (one "target" 360 appraisee with any number of raters).



Units, Locations Job Titles

Follow the simple instructions on the respective system pages as indicated below, to add your organisation chart (Units), Locations, and Job Titles:

(Only need this step if the Compass360 is a standalone system. Otherwise this step would already have been set up for your organization when the core performance system was implemented.)

System Admin	User
Units	
Locations	
Job Titles	
360 Appraisal Titles	
System Settings 🗲	-
Performance Periods	

System Admin Settings for Compass360

Make your required system feature selections (contact TalentPeak™ customer support for assistance to ensure that the appropriate selections are made to reflect your unique needs):

System Admin Users Units Locations Job Titles 360 Appraisal Titles System Settings Performance Periods

Adding 360 Appraisal Titles

Select 360 Appraisal Titles from the "System Admin" dropdown

Add the 360 Appraisal Titles (Questionnaire names) you want to use (see examples in screenshot below):

- "CT" = Context-Targeted
- "G" = Generic

There is no requirement to add these abbreviations though, as 360 questionnaire titles such as **Managers**, **Investment Team**, **Leadership**, etc. will be perfectly fine – whatever titles you deem appropriate to differentiate between your various questionnaires and the target groups they aim at.

360 Appraisal Titles	
The system allows for the creating of two different types of 360 Appre 1. CONTEXT-TARGETED: Rater Group-specific question sets, with a separate re Group. This allows for more targeted questions to (and hence more meaning specific Rater Group in respect of its unique working relationship with the App 2. GENERIC: Same set of questions for all Rater Groups, with a combined repor administer, but potentially less accurate and meaningful, as some question it relevant in respect of a specific Rater Group's unique working relationship wi	iisals: port for each Rater ful feedback from) a praisee. t. These are simpler to ems may not be fully th the Appraisee.
Add the 360 Appraisal Types/Titles you would like the system to adm • CONTEXT-TARGETED: Manager/s, Direct Reports, Peers, Internal Customers, Suppliers, etc. • GENERIC: Leadership, Management Skills, Customer Service, Interpersonal S	i nister, e.g.: External Customers, :kills, etc.
To edit existing items, select the text to be changed, make your changes, then button	click the 'Save Changes'
Save Chan	aes Add New 360 Title
CT1a: Manager/s (f/back to Non-Mgrial Staff)	X
CT 1b: Snr Manager/s (f/back to Mid/Jnr Mgrs)	X
CT1c: Exec Manager/s (f/back to Snr Mgrs)	X
CT2: Direct Reports	X
CT3: Peers	×
CT4: Customers	X
G1: Leadership	X



Performance Periods

Follow the detailed instructions on this page to set up your performance periods (ask TalentPeak™ customer support to assist if necessary).

(Only need this step if the Compass360 is a standalone system. Otherwise this step would already have been set up for your organization when the core performance system was implemented.)

Internal & External Users/Raters

Upload your internal employees (users) in bulk via the "Import Users" page (ask TalentPeak™ support to send you the relevant **Bulk User Import Excel Template**), or by adding them one at a time through the "Create New User" page.

External raters (e.g. external customers) are uploaded via the "Create New 360 External Rater" page, or by uploading them in bulk by using the **Bulk External Rater Import Excel Template**, also obtainable from TalentPeak™ customer support.



Rating Key Library



Add your 360 Rating Key/s, and select one as default. You can use different ones for different questionnaires, but do not mix them within one questionnaire.



Competency Library

Consider uploading your full set of Competencies to the Competency Library (used to easily download selected ones when creating 360 Appraisal Templates/Questionnaires). Request TalentPeak™ customer support to provide you with the full set of competencies that comes at no extra charge with the system (as an Excel Importer and/or WORD doc).



360 Appraisal Templates (Questionnaires)



Add your 360 Appraisal Templates (i.e. questionnaire competency sets) on this page (the 360 questionnaires are created via the templates).

360 Appraisal Templates				
Select All Templates (to copy Default Rating Key to)				
You have 13/13 templates in your system				
360 Appraisal Title	Template Exists?	Last Edited	Last Edited By	
CT1a: Manager/s (f/back to Non-Mgrial Staff)	Yes	5 Nov 2010	Bob Small	Edit Template Preview Delete
CT1b: Snr Manager/s (f/back to Mid/Jnr Mgrs)	Yes	11 Oct 2007	Bob Small	Edit Template Preview Delete
CT1c: Exec Manager/s (f/back to Snr Mgrs)	Yes	13 May 2010	Bob Small	Edit Template Preview Delete
CT2: Direct Reports	Yes	11 Oct 2007	Bob Small	Edit Template Preview Delete
CT3: Peers	Yes	11 Oct 2007	Bob Small	Edit Template Preview Delete
CT4: Customers	Yes	11 Oct 2007	Bob Small	Edit Template Preview Delete
G1: Leadership	Yes	20 Feb 2008	Bob Small	Edit Template Preview Dalata

To add Competencies to a template/questionnaire, click the Create Template link:

Customers	Yes	29 Sep 2006	Don Munro	Edit Template Preview Delete
Leadership	No	1 Jan 0001		Create Template

Click the <u>click here</u> link to add the Competencies:

	360 Ar	opraisal Template: Leadership Dunlock Template ○Lock Template
	Template Preview Last Edited <u>Bob Small</u> Created 23 May 2012 <u>Update Competencies</u>	Make changes to the fields below as needed, then press the Save button at the bottom of this panel Notes
Performance Measures	Performance Measure Details	
	Please select a Performance Measure	on the left, or <u>click here</u> to create a new one
month and have	and man man and a series	Service Surgers of the and the and the property for the

Competencies can be copied from e.g. a Word doc, and pasted into the fields as indicated below, and/or selected from the Competency Library:

	360 A	ppraisal Template: Leadership 🔮
	Template Preview Last Edited <u>Don Munro</u> Created 2 May 2012 <u>Update Competencies</u>	Make changes to the fields below as needed, then press the Save button at the bottom of this panel Notes
Performance Measures	Performance Measure Details	ion / Item
Copy and paste, or type	Business Acumen Performance Standards / Behav Has an excellent understanding of general Understands the nature and purpose of the Understands the complex dynamics of the Is aware of the complexition and their mod Apples his/ther business intowledge effect	vioural Indicators if a Competency Ususiess and financial concepts and principles. e organisation, its mission, vision, goals, values, core competencies, culture, products, customers, and con business. us operandi. evit to promote organisational goals.
Select Competencies — from Library	Load new Competency from Database Rating Key (What performance) or behaviour describes each level?)

Select Competencies from the Library, and download them into the template:

🕑 Business Acumen	1
 Has an excellent Understands the competencies, c Understands the Is aware of the Applies his/her to 	t understanding of general business and financial concepts and principles. I nature and purpose of the organisation, its mission, vision, goals, values, con- sulture, products, customers, and competitive advantage. I complex dynamics of the business. competition and their modus operandi. business knowledge effectively to promote organisational goals.
Cooperation / Co	llaboration
	s assignments from line manager.
 Willingly accepts Voluntaors for w 	
 Willingly accepts Volunteers for w Contributes exp 	vork. ected share in team context.
 Willingly accepts Volunteers for w Contributes exp Works effectivel 	vork. ected share in team context. ly in cross-functional project teams (where required).

Two 360 Questionnaire Types

You can set the questionnaires for rating at the Competency Level OR the (Behavioural) Indicator Level:

Questionnaire Type	Pros	Cons
(a) Competency Level (More suitable with 11 or more Competencies)	 Fewer items to rate, which may speed up the questionnaire completion. Simpler 360 reports, as analysis is done at the Competency level only. 	• All Behavioural Indicators per Competency have to be read through by raters, and a combined rating per Competency decided. Some raters may find this difficult to do.
(b) Indicator Level (More suitable with 10 or less Competencies)	 Some raters may find the rating of each separate Behavioural Indicator easier to do. 360 reports include analysis at the Indicator level (deeper drilldown for those wanting it). 	 More items to rate, which will take more time. Raters may get exhausted and rush through which can lead to a poorer quality end result.

The general rule is to rather have fewer (e.g. 6 to 12) Competencies per questionnaire, than too many that can lead to rater exhaustion and poor quality results, especially if a rater has many questionnaires to complete.

(a) Competency-Level Questionnaire Sample:



(b) Indicator-Level Questionnaire Sample:



To set questionnaires for rating at the Behavioural indicator level, tick the box indicated below:



The Template Preview will display as follows:



When this box is NOT ticked, the questionnaire will be automatically set for rating at the Competency level.

Creating a 360 Appraisal for an Employee



Select Create New 360 Appraisal, and follow the detailed instructions provided:

Create New 360 Appraisal	
Create a new 360 appraisal by selecting an er the dropdown lists below; then click 'Create 30	nployee name, a Performance Period, and the required 360 Appraisal Type from 50 Appraisal'.
It is possible to create more than one 360 app you do not create such duplications inadverter employee has a 100% correct email address i	oraisal for the same person for the same Performance Period, so make sure that tly (check the 360 Appraisal Manager page). Also first make sure that the n his/her User File.
 Select Employee Please select the employee you wish to create a 360 appraisal for. 	3. Select 360 Appraisal Type Please select the required 360 Appraisal Type:
Beaumont, John	 Context-Targeted (Rater Group-specific question sets, with a separate report for each Rater Group)
2. Select Performance Period Please select the Performance Period you wish to create the 360 appraisal for.	Generic (same set of questions for all Rater Groups, with a combined report)
	Create 360 Appraisal

NOTE: It is possible to create an unlimited number of 360 Appraisals, add raters, and have them complete their 360 Questionnaires, but the 360 reports will not be viewable until the 360 Appraisal has been locked down on the **Indiv Reports** page. The moment the "Lock Down 360 Appraisal and Generate Reports" button is clicked (and you select "Yes" on the pop-up warning) your organisation gets debited with one 360 Appraisal Unit (if you have any units still available in credit).

360 Raters Page

By clicking the "Create 360 Appraisal" button (see screenshot above), the following page gets created:

Name: John Beaumont Job Title: Recruitment Officer Location: Los Angeles Unit: HR-> Recruitment 360 Appraisal Information Appraisor Job Title: HR Manager Perf Period: 1 Jan 2012 - 31 Dec 2012 Due Date: Itel: Set date by when questionnaires must be completed Itel: Itel: Itel: (A) 360 Raters for Appraisee (Feedback Recipient) John Beaumont Jump-to-Individual-Reports-Page Click the 'Open Multirater Selector' button on the right to add Raters for this Appraisee. Open Multirater Selector >> No 360 Appraisal Title Rater Email Address	Appraisee In	formation						
360 Appraisal Information Appraisor Job Title: HR. Manager Perf Period: 1 Jan 2012 - 31 Dec 2012 Due Date: 18 May 2012 Set date by when questionnaires must be completed (A) 360 Raters for Appraisee (Feedback Recipient) John Beaumont Click the 'Open Multirater Selector' button on the right to add Raters for this Appraisee. No 360 Appraisal Title Rater Email Address	Name:	John Beaumont		Job Title:	Recruitment Of	ficer		
360 Appraisal Information Appraisor Job Title: HR Manager Perf Period: 1 Jan 2012 - 31 Dec 2012 Set date by when questionnaires must be completed (A) 360 Raters for Appraisee (Feedback Recipient) John Beaumont Click the 'Open Multirater Selector' button on the right to add Raters for this Appraisee. Open Multirater Selector' button on the right to add Raters for this Appraisee. No 360 Appraisal Title Rater Email Address Send Notification Status 0/0	Location	Los Angeles		onic.	The Recondition	in c		
Appraisor Job Title Remove	360 Appraisa	al Information						
Perf Period: 1 Jan 2012 - 31 Dec 2012 Due Date: 18 May 2012 End May 2012	Appraisor:	Bob Small		Appraisor Job 1	Title: HR Manager			
Set date by when questionnaires must be completed (A) 360 Raters for Appraisee (Feedback Recipient) John Beaumont Jump-to-Individual-Reports-Page Click the 'Open Multirater Selector' button on the right to add Raters for this Appraisee. No 360 Appraisal Title Rater Email Address Send Notification Status 0/0	Perf Period:	1 Jan 2012 - 31	Dec 2012	Due Date:	18 May 2012	🖽 Change du	e date as require	d, and click Sa
(A) 360 Raters for Appraisee (Feedback Recipient) John Beaumont Jump-to-Individual-Reports-Page Click the 'Open Multirater Selector' button on the right to add Raters for this Appraisee. Open Multirater Selector >> No 360 Appraisal Title Rater Email Address Send Notification Status 0/0 Remove	Set dat	e by when qu	estionnaires must b	e completed				6
(A) 360 Raters for Appraisee (Feedback Recipient) John Beaumont Jump-to-Individual Reports Page Click the 'Open Multirater Selector' button on the right to add Raters for this Appraisee. Open Multirater Selector >> No 360 Appraisal Title Rater Email Address Send Notification Status 0/0 Removing	Set dat	e by when qu	estionnaires must b	be completed				Sa
(A) 360 Raters for Appraisee (Feedback Recipient) John Beaumont Jump-to-indivdual+keports-rage Click the 'Open Multirater Selector' button on the right to add Raters for this Appraisee. Open Multirater Selector >> No 360 Appraisal Title Rater Email Address Send Notification Status 0/0 Remove	Set dat	e by when qu	estionnaires must b	be completed				Si
Click the 'Open Multirater Selector' button on the right to add Raters for this Appraisee. Open Multirater Selector >> No 360 Appraisal Title Rater Email Address Send Notification Status 0/0 Removi	Set dat	e by when qu	estionnaires must b	be completed			•	S
Click the 'Open Multirater Selector' button on the right to add Raters for this Appraisee. Open Multirater Selector' >> No 360 Appraisal Title Rater Email Address Send Notification Status 0/0 Remove	Set dat (A) 360 Rate	e by when qu ers for Appraise	estionnaires must b e (Feedback Recipient	oe completed			Jump-to-Indivdual-	Reports-Page
No 360 Appraisal Title Rater Email Address Send Notification Status 0/0 Remov	Set dat (A) 360 Rate	e by when qu ers for Appraised	estionnaires must b e (Feedback Recipient) John Beaumont			Jump-to-Indivdual-	Reports-Page
No 360 Appraisal Title Rater Email Address Send Notification 0/0 Remov	Set dat (A) 360 Rate	e by when que ers for Appraised	estionnaires must b e (Feedback Recipient r' button on the right to a) John Beaumont	e		Jump-to-Indivdual- Open Multirater	Reports-Page Selector >>
	Set dat (A) 360 Rate	e by when que ers for Appraised Multirater Selecto	estionnaires must b e (Feedback Recipient r' button on the right to a) John Beaumont	e		Jump-to-Indivdual	Reports-Page Selector >>
	Set dat (A) 360 Rate Dick the 'Oper No 360 Ap	e by when qui ers for Appraised Multirater Selecto ppraisal Title	estionnaires must b e (Feedback Recipient r' button on the right to a Rater	be completed) John Beaumont add Raters for this Appraise Email Add	e.	Send Notification	Jump-to-Indivdual- Open Multirater : Status 0/0	Reports-Page Selector >> Remove
	Set dat (A) 360 Rate Click the 'Oper No 360 A	e by when qui ers for Appraised Multirater Selecto ppraisal Title	estionnaires must b e (Feedback Recipient Ir' button on the right to a Rater	De completed) John Beaumont add Raters for this Appraise Email Add	ie.	Send Notification	Jump-to-Indivdual- Open Multirater Status 0/0	Reports-Page Selector >> Remove

Change the **Due Date** to the date by when all 360 Appraisal Questionnaires should be completed by the raters.

Assigning Raters (internal and/or External)

Click the "Open Multirater Selector" button (see screenshot above), to open the following new page section:

(a) Generic 360 Selector View:

Select the required 360 questionnaire in the dropdown list:



Add the raters (see screenshot below):

- All internal users/employees show in the "Available Raters" field of Rater Selector 1 to select from to add as raters
- The available external raters show in Rater Selector 2.
- Add the raters by selecting the relevant names on the left (hold down CTRL key for multiple selections), and then clicking the relevant Rater Group button in the middle, to move them over to the section on the right. Then click the Add Raters button.

	Available Raters Last name starts with Search		Selected Raters	
360 Rater Quick Status	Aarons, Annie Aho, Manny Beaumont, John Becker, Craig Bell, Jan Bracs, Jenny Cross, Ron Donald, Don Dutton, Shack Dutton, Shack	Manager/s -> Donal Dutto Dutto Dutto Dur Reports -> Hopki Or Reports -> Smith Customers -> Other -> <-Remove	d, Don (Manager/s) n, Jack (Dir Reports) in, Dan (Dir Reports) in, Dan (Dir Reports) ns, Deno (Dir Reports) ns, Deno (Dir Reports) , Lesley (Peers) , Rebecca (Peers) dc, Kristy (Peers) Add Raters Cancel	

The raters (once added) will show in a table below the selector as follows (you can now close the selector):

(A) 360 Katers for Appraisee (Feedback Recipient) John Beaumont Jump-to-Individual-Reports-Page													
Click the 'Open Multirater Selector' button on the right to add Raters for this Appraisee. Open Multirater Selector >> No. 260 Appraise1 Title Pater Empil Address Cond Notification Status Remain Status													
NO	360 Appraisal Litle	Kater	Email Address	Send Notification	0/10	Remove							
1 G1: Leadership		Warrick, Kristy (Dir Reports)	kristy@company.com.au	Send Email Not Yet Sent Send Reminder Not Yet Sent	Not Started	Remove							
2	G1: Leadership	White, Wayne (Dir Reports)	wayne@company.com	Send Email Not Yet Sent Send Reminder Not Yet Sent	Not Started	Remove							

Appraisee Self-Appraisals show in a separate table on the same page. Click the link indicated below to create the 360 self-appraisal:

(B) 9	Self-Appraisals by Appr	aisee John Beaumont			Jump-to-Indivdual-Re	eports-Page						
Self-Appraisals allow the Appraisee to compare his/her ratings against the averaged ratings of the various Rater Groups - to identify gaps in perception and areas for attention and improvement. NOTE: There may be occasions when you do not want to create Appraisee Self-Appraisals, such as when using 360 Appraisals for Promotion or Succession Planning purposes, and you do not want the Appraisee to participate or even know about it. G1: Leadership To create an Appraisee Self-Appraisal for this 360 Appraisal Type, <u>click here</u>												
No	360 Appraisal Title	Appraisee	Email Address	Send Notification	Status 0/1	Remove						
1	1 G1: Leadership Beaumont, John		john@company.com	Send Email Not Yet Sent Send Reminder Not Yet Sent	Not Started	Remove						
To send all Rater Notifications (at the same time), <u>click here</u> Preview Email Notifications												

NOTE: You may sometimes choose not to have Appraisees complete self-appraisals, such as when they are among other candidates for promotion/succession, and you do not want them to know that a 360 Appraisal is being done on them.

(b) Context-Targeted 360 Selector View:

In the case of Context-Targeted 360s, you need to select a separate questionnaire for each separate Rater Group you want to involve:

1. Internal Rater Groups (e	.g. Line Managers, Direct Repor	ts, Peers, Internal Customers)
Select 360 Appraisal Template:	Please select 🗸	Preview Template
Download the above Template Select those employees in the You should select at least and prevent 'witch-hunting might to them - depending of more of It is not recompensation to not Context-Targeted Questionnaires	please select CT1a: Manager/s (f/back to Non-Mgrial Staff) CT1a: Srr Manager/s (f/back to Mid/Jnr Mgrs) CT1c: Exce Manager/s (f/back to Snr Mgrs) CT2: Direct Reports CT3: Peers CT4: Customers G1: Leadership G2: 360 Example Questionnaire Investment Team Investment Team (2) Leadership Management Team New 360 Q Personal Effectiveness (2)	with sufficiently long (3 months minimum) to be anonymity of individuals (Line Managers excluded isees should also be consulted in the nomination Selected Raters
360 Rater Quick Status	Aarons, Annie Alho, Manny Beaumot, John Becker, Craig Bell, Jan Bran-Jenn	

The adding of raters work differently to Generic 360s in that the raters are selected based on the Context-Targeted Questionnaire selected, e.g. if the **CT: Peers** questionnaire is selected, then selected the peers to be added. Next select a new questionnaire, e.g. **CT: Direct Reports**, and then add all the direct reports of the appraisee to this questionnaire, etc. You can have as many different questionnaires for one 360 as you like.



The different questionnaires used can be seen in the table:

r	P~		r~~~~~		Send Email	~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~	~~~~~
	2	CT2: Direct Reports	Warrick, Kristy	kristy@company.com.au	Not Yet Sent Send Reminder Not Yet Sent	Not Started	Remove
	3	CT2: Direct Reports	White, Wayne	wayne@company.com	Send Email Not Yet Sent Send Reminder Not Yet Sent	Not Started	Remove
	4	CT3: Peers	Beaumont, John	john@company.com	Send Email Not Yet Sent Send Reminder Not Yet Sent	Not Started	Remove
IL_			and a second second	man put a por	Send Email	and and	

The appraisee need to complete all the questionnaires:

B)	Self-Appraisals by Appr	raisee Ron Cross			Jump-to-Indivdual-R	eports-Page	
elf-A rom (T2: (T3: (T4:	Appraisals allow the Appraise tention and improvement. otion or Succession Plannir Direct Reports To create Peers To create Customers To create To create	see to compare his/her rati NOTE: There may be occas ng purposes, and you do no a an Appraisee Self-Apprais a an Appraisee Self-Apprais a an Appraisee Self-Apprais a an Appraisee Self-Apprais	ings against the averaged ratings of the various sions when you do not want to create Appraises to want the Appraisee to participate or even kno tal for this 360 Appraisal Type, <u>click here</u> sal for this 360 Appraisal Type, <u>click here</u> sal for this 360 Appraisal Type, <u>click here</u> sal for all the above 360 Appraisal Type, <u>click here</u>	Rater Groups - to ider Self-Appraisals, such a w about it.	itify gaps in percep as when using 360	tion and area Appraisals fo	
No 360 Appraisal Title		Appraisee	Email Address	Send Notification	Status 0/3	Remove	
1	CT2: Direct Reports	Cross, Ron	ron@company.com	Send Email Not Yet Sent Send Reminder Not Yet Sent	Not Started	Remove	
2	CT3: Peers	Cross, Ron	ron@company.com	Send Email Not Yet Sent Send Reminder Not Yet Sent	Not Started	Remove	
3 CT4: Customers		Cross, Ron	ron@company.com	Send Email Not Yet Sent Send Reminder	Not Started	Remove	

Email Notifications

Next, click the links as indicated to send the initial email notifications (or reminders) - individually, or in bulk at the same time.

ſ	~	~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~	Edit	Edit	Not Yet Sent	~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~		~1
	11	CT4: Customers	Hussey, Ben Edit	ben@company.com	Send Email Not Yet Sent Send Reminder Not Yet Sent	Not Started	Remove	
				Bulk send ——	o send all Rater Notific	ations (at the same <u>Preview E</u>	time), <u>click here</u> mail Notifications	

Via the **Bulk-Manage 360 Appraisals** page, the initial email notifications and reminders can also be sent for ALL 360s at the same time, and also set as automated reminders as per your frequency settings. (Automated email reminders stop once a questionnaire has been completed. The CorpAdmin is also sent an email report as to how many automated reminders were sent out by the system overnight.)

			Filter					Apply Filter	Clear Filter
Appraisals	Reports		Options	All 360s	~	360 Title	All 360 Titles		~
Abbi disais	Reports		Perf Period	1 Jan 2012 - 31 De	c 2012 (current)	Job Title	All Job Titles		*
360 Appraisal Ma	nager		Location	All Locations	~	Appraisee	enter 1st few l	etters of first/last i	name
Create New 360	Appraisal		Unit	All Units					*
Bulk-Manage 360	Appraisals 🚽	-	Automate Send remin	d 360 Reminders ders from 5	days before the	360 Due Date	e, every	Send All Initial E	mails NOW
Template Manage	er 🕨		2 💌 da	ys, until questionna	ire is signed off o	or the 360 loc	ked down	Send All Remin	ders NOW

Both internal and external raters receive an email notification containing a hyperlink which, if clicked, takes them directly to their 360 Questionnaire (without the need to log into the system).

Example Email notification:



Internal Rater Completion of Assigned 360 Questionnaires

Although **Internal raters** also have a hyperlink in the email they receive (to open the questionnaire directly) they can also access their assigned questionnaires by going to their **Appraisee** Role (this may be the only role they have)...

5	Welcome Kristy Warrick Appraisee
<.	growth at head mouth of

...and selecting Appraisals >> 360 Appraisals TO DO.



There are two categories (follow the detailed instructions):

- Colleague Appraisals
- Self-Appraisals

	Colleague Appraisal: The following of you Please click 'Apprais If you were unable t If you do not have ti Once you have signe Please complete the	s r colleagues have e' to proceed with o observe this pe me to complete a ed off an appraisa appraisals by the	been assigned to you the 360 feedback app rson in respect of a sp n entire questionnaire I questionnaire, you w due dates indicated.	for 360-degre raisal for this acific measure in one sitting, Il not be able t	e feedback. person. , select the ra just click 'Sa to make char	ating option 'Ur ve Progress' or nges to it afterv	nable to ra r 'Save and wards, but	rate; nd C it yo	; N/A'. Complet ou can a:	e Later', sk your ;	log out, System	, and retur Administr	n later to a	complete lo your s	it in ful ign off i	ll. if you wish	to do so.		
L	Person to Appraise Job Title 360 Title Due Date Status																		
L	Beaumont, John	Recruitment Offic	cer G1: Leadership	18 May 2012	Not S	itarted 🛛	Appraise	e											
L	Small, Bob	HR Manager	Investment Team	20 Jun 2012	Completed:	3 May 2012 /	Appraise	e											
L	Small, Bab HR Manager Investment Team 20 Jun 2012 Completed: 3 May 2012 Appraise Hanko, Tom CEO G1: Leadership 21 Aug 2012 In Progress Appraise																		
	Self-Appraisals You have been assig Some of your collea Your self-appraisal/s strengths, and identi If you do not have ti Once you have signe Please complete you	ined to do the 360 gues and/or custo s will be compared fying areas in wh me to complete a ad off an appraisa r self-appraisal/s) self-appraisal/s listed mers were asked to c l with their appraisals ich you may want to in n entire self-appraisal l questionnaire, you w by the due date/s indi	below. omplete the sa of you, so that prove. in one sitting, Il not be able t cated.	me 360 ques the differenc just click 'Sa o make char	stionnaire/s in r ces in perceptio ve Progress' or nges to it afterv	respect of I on can be in r 'Save and wards, but	f hor ider nd C it yo	w they p intified w Completion	perceive vith a vie e Later', sk your ;	your w w to inc log out, <u>System</u>	orking rela creased av , and retur Administr	itionship w vareness o n later to d a <u>tor</u> to uno	ith them. f how yo complete lo your s	u are pe it in ful ign off i	erceived by II. if you wish	y them, buil to do so.	ding on	your
L	Person to Appraise	Job Title	360 Title	Due Date	Status														
L	Warrick, Kristy	Consultant Pers	onal Effectiveness (2)	21 Sep 2012	Not Started	Self-Apprais	<u>se</u>												
L.																			

360 Appraisal Questionnaires

Following is an example of a 360 Questionnaire, with rating set at the behaviour indicator level:

360 Appraisal For Jenny Bracs Rater Group: Manager/s Due Deta: 14 Sep 2012
Appraisee Information Name: Jenny Bracs Job Title: Recruitment Officer Location: Los Angeles Unit: HR->Recruitment
Instructions: You have been assigned to provide feedback about the person mentioned above in your capacity as part of the following 360 Feedback Rater Group: Manager/s. Thank you for agreeing to do so.
 Please read each item carefully and select the rating that best reflects your opinion. All items NUST be rated. To clarify your rating, consider adding your written comments as to what you believe the appraisee is doing well, and what can be improved. Please take some time to think of what the appraisee does well as such feedback can be encouraging and telling him/her what to keep on doing.
 We request that you be as honest and candid as possible, so as to be positively helpful to the appraisee. Please note that you will remain strictly ANONYMOUS to the appraise and that your ratings will simply
be averaged with other responses received (except if you are the appraisee's only line manager of course). If you are concerned that your comments may identify you, you may want to generalise your comments and refrain from mentioning specific events.
Once you have rated all items, and citedd 'Sign Off and Submit Appraisal', you will not be able to make changes to the questionnaire any longer (but you can ask the System Administrator to undo your signoff if you want to do so).
Investment Team (2)
Rating Key 5. Exceptional Strength 4. Strength 3. Fully Competent 2. Development Need
I significant Development Need Unable to rate: N/A
1. O O O O Is highly organised.
2. O O O O Is elective at xeeping records and eliminating unnecessary paperwork. 3. O O O O Helps improve administrative processes
6. Interpersonal Relationships/Skills
N/A 1 2 3 4 5 24 25 25
26. O Is patient and understanding, listens empathetically to others and respects their opinions. 27. O O Makes others feel appreciated, valued and included, and is considerate of their needs and feelings. 28. O O Is patient to cultural diversity, race, gender, and other individual differences.
What is done WELL? (consider above Performance Standards/Behavioural Indicators - if any)
What could be improved?
What could be improved? Save Progress Save Progress Spell Check We thank you for your valued feedback and taking the time to complete this questionnaire!

360 Appraisal Manager Page

In your CorpAdmin Role, select Appraisals >> 360 Appraisal Manager.

On this page you can view all the 360 appraisals you have created, the Rater Groups' **Rating Average** (Appraisee self-appraisal/s excluded), as well as the number of **360 Questionnaires per 360 completed** (self-appraisal/s included).

360 Appr	aisal Manager								Welcome Bob S	Small	Acces	s privileges: CorpAdmin	<u>Appraisor</u>	Appraisee
Home	System Admin Use	ers /	Appraisa	ls Re	ports									Sign Out
			360 Apprai	sal Manager										
			Create Nev	v 360 Apprai	al					Charles and the				
			Bulk-Manaç	ge 360 Appra	isals			Appraisor	Apply Filter	Clear Filt	er			
			Template N	lanager	•		~	Job Title	All Appraisors		~			
				-		2012 - 31 Dec 2012 (current)	~	Appraisee	All Job Titles		~			
					All Loc	ations	*	Appraisee	enter 1st few letters of first	/last name				
					All Unit	ts					~			
			Â		GHI	JKLMNOPQRSTUV	<u>w x y</u>	Ζ						
360 App	oraisals											360 Rater Quick Status	Export to	Spreadsheet
5 results ret	urned													
Appraisee Appraisor			<u>Job Titl</u>	<u>e</u>	D	<u>Due Date</u> Si	gnoff		<u>360</u>	s Complet	<u>ed</u>	Rating Average		Form Links
Appraisee: S Appraisor: <u>H</u>	<u>Small, Bob</u> Ianko, Tom		HR Man	ager	2	1 May 2012 A A	opraise opraiso	e: Not yet r: Not yet		1/8		2.8	: L	360 Raters Indiv Reports Jndo Sign Off Delete
Appraisee: <u>H</u> Appraisor: <u>S</u>	<u>Ianko, Tom</u> Imith, Lesley		CEO		2	2 May 2012 A A	opraise opraiso	e: Not yet r: Not yet		0/7		0	i U	360 Raters Indiv Reports Jndo Sign Off
lange grade	Nick, Kristy	A started	-			0.04a.030	-	And at an	1	Las he		- And and a second	A Prese	2 Bate

Individual Reports Page



Once you are satisfied that all the raters have completed their questionnaires, you need to lock down the 360 Appraisal by clicking the "Lock Down 360 Appraisal and Generate Reports" button, bottom left of the **Individual Reports** page. Your organisation will then be debited with one 360 Appraisal Unit, if you have any units still available in credit (balance viewable on the system home page) failing which the system will warn you accordingly.



NOTE: You can lock down a 360 without having to wait for delinquent raters to complete their questionnaires. Remove them from the rater table if you like, but leaving them in the table (even with partially completed questionnaires) will not cause any problems or calculation issues, as they will be fully excluded from the results.

NOTE that a RED Indiv Reports link on the **360 Appraisal Manager** page is a visual clue that this 360 Appraisal has not yet been locked down:



Locking down a 360 generates FOUR reports (Graphical, Graphical MAIN, Narrative, Tabular), accessible through the links as indicated below:

L									~~~~~	• •-	-v	-	÷	
L	360 Title	#Raters-Rater Gp	-Rater	Gp	F	Rating-S	Self				eports			
L	1. Personal Effectiveness (2)	2.9				3.8			Graphical (MAIN) Narrative			Tabular		
Lock Down 360 Appraisal and Generate Reports Locked down by Bob Small 08 May 2009											ers-Page			
L		360 Title	Self	RGp	0	1	2	3	4	5				
L		1 Barcanal Effectiveness (2)	2.0	2.0	3.8									
L		1. Personal Effectiveness (2)	5.0	2.9	2.9									
Ŀ					0	1	2	3	4	5				
L.														

Please note that such a lockdown cannot be reversed -- as you will be alerted about (via a system pop-up) when clicking the lockdown button.

Once a 360 Appraisal has been locked down, no further changes can be made to it, i.e. you cannot add any further raters, and any uncompleted questionnaires can no longer be completed.

The "Lock Down 360 Appraisal and Generate Reports" button can be clicked by System Administrators as well as Appraisors, if the latter are allowed to do so as per your System Settings and your HR policy in this regard. The name of the person who did the locking down, as well as the date, will show next to the lock-down button (see screenshot above).

Individual Report Views

Report 1: Tabular

Competency-level Tabular Reports show the ratings per Competency only:

No	Measure / Competency / Item	Manager/s	Peers	Dir Reports	Averages	Appraisee
1	Strategic Thinking / Visioning	4	2	2.5	2.8	4
2	Business Thinking/Acumen	3	2.5	3	2.8	3
3	Team Building and Motivation	4	3.5	2	3.2	5
4	Coaching / Mentoring	4	2.5	3	3.2	2
5	Communication (Oral and Written)	5	3.5	2.5	3.7	4
6	Conflict Management	3	2.5	2.5	2.7	4
7	Creativity / Innovation	4	4	3	3.7	4
8.4	Decisiv ness	Land and the second	3.5	3		Land Sund

Indicator-level Tabular Reports show the ratings per Behavioural Indicator as well (see red text below):

N	Measure / Competency / Item	Manager/s	Peers	Dir Reports	Averages	Appraisee
	Commitment / Dedication	3.7	4.1	4.8	4.2	5
	1. Actively strives to achieve objectives, and ensures desired outcomes are achieved.	з	4	5	4	5
ľ	2. Is willing to "go the extra mile" to achieve results.	4	4	4.7	4.2	5
	3. Has a strong sense of personal obligation.	4	4.3	4.7	4.3	5
Γ	Communication (Oral and Written)	2	2.1	1.9	2	4
L	Expresses views in Fluent, clear, I for manner with enthusiasm and deoce.	not have	2.3	and the second		

Report 2: Narrative

This report has as primary focus the provision of narrative (qualitative) feedback to Appraisees.

4. Flexibility / Adaptability									
Self: 4 4 2.3 Rater Gp: 2.3	 Performance Standards / Behavioural Indicators Is open to new ways of working, ideas and processes. Adapts quickly and effectively to new environments, people, and responsibilities. Readily adapts to stressful situations and factors outside of his/her control. 								
What is done WELL? (consider above Performan	nce Standards/Behavioural Indicators - if any)								
Self I adapt quickly to new situations and responsib	ilities								
Rater Group Handles stressful situations well									
He readily adapts to factors outside of his contr	rol.								
What could be improved?									
Self Rater Group	Comments by different raters								
Ideas from others not always appreciated	by outers - uninking he has an are answers.								
Deon thinks others' ideas are not worthy of cor	nsideration, which can be very demotivating.								
Can be temperamental at times									
Can have a bit of a confrontational style in team meetings when he gets some opposition to his ideas.									

NOTE: Quantitative ratings serve a certain purpose (i.e. pointing out rating gaps), but without telling Appraisees in text/narrative form (as above) more specifically what they are doing **well**, and what **should be improved**, ratings (and graphs) alone will have limited value; and may even cause Appraisee anxiety -- not knowing what to keep on doing, or what to change.

Report 3: Graphical

This report has two Bar Charts

Bar Chart 1 example:

Bar Chart											
Active Target: Item # No of Items: All Order: Ascending											
Show individual Rater Groups				Sh	ow Stand	ards/Indi	cators				
Measure / Competency / Item	Self	RGp	0	1	2	3	4	5			
	5	4.2	5 4.2								
1. Commitment / Dedication		Mgrs	3.7								
		Peers	4.1								
		DRpts	4.8								
	4	2	4								
2. Communication (Overland	1	2	2								
Written)		Mgrs	2								
		Peers	2.1								
	_	DRpts	1.9								
	4.2	3.1	4.2								
			3.1								
3. Creativity / Innovation		Mgrs	3.4								
		Peers	3.2								
		DKPTS	2.0								
	4.3	2.2	4.3								
4. Elexibility / Adaptability		Mars	2.7								
and a second	-	De		-	-			-			

This bar chart has a filter (see below) to create dynamic "sub-reports" of any combination you wish (Active Target, No of Items, Order). This is extremely useful in analysing Appraisee Strengths and Development Needs – and to use during feedback/coaching sessions with employees.

Report Op	Report Options								
Active Target:	◯Item # ⊙Self ◯RGp								
No of Items:	○ All ○ 1 ○ 2 ⊙ 3 ○ 4 ○ 5								
Order:	⊙ Ascending ○ Descending								
Generate	Report Default								

Bar Chart 2 (Gap Analysis) example:

This report shows the difference in ratings (i.e. the 'gap') between the Appraisee (Self) and the Rater Group for each item. It highlights the Appraisee's 'blind spots' in respect of both over-rating and under-rating.											
Show : O All Manager/s Peers Dir Reports											
		She	ow Standa	ards/Indic	ators						
Measure / Competency / Item	Self	RGp	0	1	2	3	4	5			
4. Flexibility / Adaptability	4.3	2.2	2.1								
2. Communication (Oral and Written)	4	2	2								
8. Self-Control	3.5	1.6	1.9								
3. Creativity / Innovation	4.2	3.1	1.1								
1. Commitment / Dedication	5	4.2	0.8								
7. Interpersonal Relationships/Skills	2.8	2	0.8								
5. Initiative / Proactivity	3.6	3.7	0.1								
6. Integrity	3	4	1								
Average	3.8	2.9	0.9								
			0	1	2	3	4	5			
				She	ow Standa	ards/Indic	ators				

Report 4: Graphical MAIN



360 Appraisal Signoff

The purpose of this signoff is to enable Appraisees to view their 360 reports online as well (if that is company policy/practice), which will not be accessible by them from their system login until this signoff link is clicked. System Administrators can do this as well as the direct line managers of Appraisees (if so enabled as per your System Settings).

Appraise	e Information		
Name:	Deon Hopkins	Job Title:	Marketing Manager
Location:	Sydney	Unit:	Marketing
360 Appr	aisal Information		
Appraisor:	Don Donald	Appraisor Job Title:	Accountant
Perf	1 Jan 2009 - 31 Dec 2009	Due Date:	Thu, 14 May 2009
Sign Off Please ente "Sign Off N so. Appraisor	er any general comments yc iow" link. The Appraisee sigr (add any general comments if y	ou may have, and then ns off last, and should rou like)	n sign the Appraisal off by clicking the be given sufficient time and privacy to
Sign Off Please ente "Sign Off N so. Appraisor	er any general comments yc low" link. The Appraisee sigr (add any general comments if y	ou may have, and then ns off last, and should ou like)	n sign the Appraisal off by clicking the be given sufficient time and privacy to
Sign Off Please entr "Sign Off N so. Appraisor	er any general comments yc ow [®] link. The Appraisee sigr (add any general comments if y signoff to re;	ou may have, and then no off last, and should ou like) o enable appra port viewing	n sign the Appraisal off by clicking the be given sufficient time and privacy to
Sign Off Please ent "Sign Off N so. Appraisor	er any general comments yc ow" link. The Appraisee sigr (add any general comments if y signoff to re;	ou may have, and then ns off last, and should ou like) o enable appra port viewing	n sign the Appraisal off by clicking the be given sufficient time and privacy to NISEE Don Donald Signed Off 13 Apr 2

The Appraisee signs off last (this is not obligatory), also done on the **Indiv Reports** page, which can be opened by them only once the signoff as per the screenshot above had been done (which itself is not obligatory).

360 Appr	aisal Manager						W	elcome Deon Hop	kins Appraisee
Home	Appraisals	My User File							Sign Ou
	360 Appraisal Man	ager 🚽 🗕 🗕							
	360 Appraisals TO	DO	Filter			Apply Filter Cl	lear Filter		
			Perf Period	1 Jan 2009 - 31 De	ec 2009 💌				
					Ap	opraisee Deon Hopkins			
360 App	oraisals								
One result re	eturned								
Appraisee Appraisor		Job Title		Due Date	Signoff		360s Completer	d <u>Rating Average</u>	Form Link
Appraisee: Appraisor: 5	Hopkins, Deon Small, Bob	Marketing Man	ager	14 May 2009	Appraisee: Not yet Appraisor: 13 Apr 2011 (Don Dona	ld)	8/8		Indiv Report
						Only viewa	ble after m	anager/admin sig	noff
	and a short	and at	~~~ /	A land	and the second s	and another	and the second	- marine	and the second second
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