

Release Notes Performance Management

Release 2016-12

Content

New	3
1. Improved user interface for the HR cycle	3
2. Editing manually added review meeting parts	4
3. Do not show empty review meeting parts in a report	5

This document describes the new functionality and improvements introduced by this release. Some of these changes have been inspired by messages and reports from customers. Where relevant, we have included a number in the section title to refer to the identification of the message (change) in question in our system.

New

1. Improved user interface for the HR cycle

Why

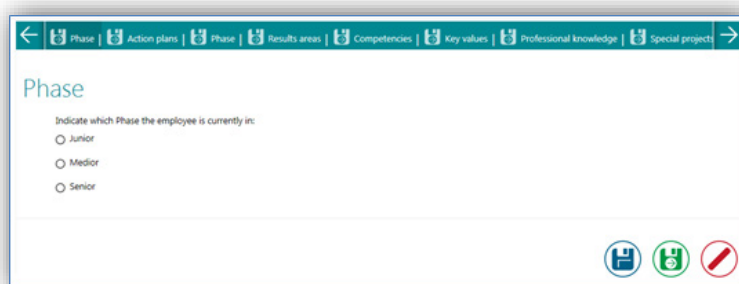
The HR cycle consists of a number of steps that you can configure yourself. Formerly, a horizontal HR cycle ribbon enabled you to navigate through these steps, but this user interface was not always user-friendly in practice. For instance, it was not immediately clear which steps to take and the navigation options were also limited.

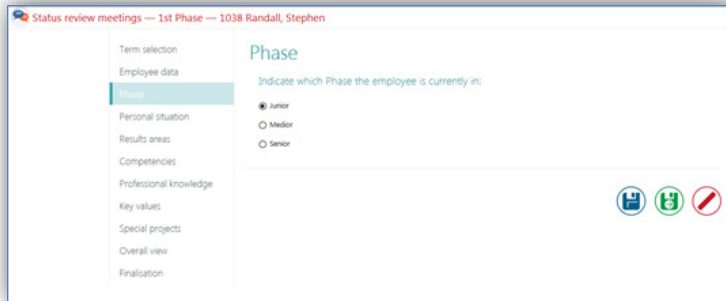
How

As announced in the 2016-11 release notes, the new user interface will become available once the current release has been installed.

The existing green/blue horizontal bar that contains the review meeting parts will then have been replaced by a vertical menu. This will show you at a glance which steps you have to take and it will make it easy to switch between review meeting parts.

The first image shows you the former user interface and the next image shows the new one. Since you determine the content of the HR cycle yourself, the images shown below are only examples.





Only the menu structure and the navigation have been changed. The underlying functionality has remained unchanged.

Your action

The new user interface will be made available to you automatically. You do not have to undertake any special action for this.

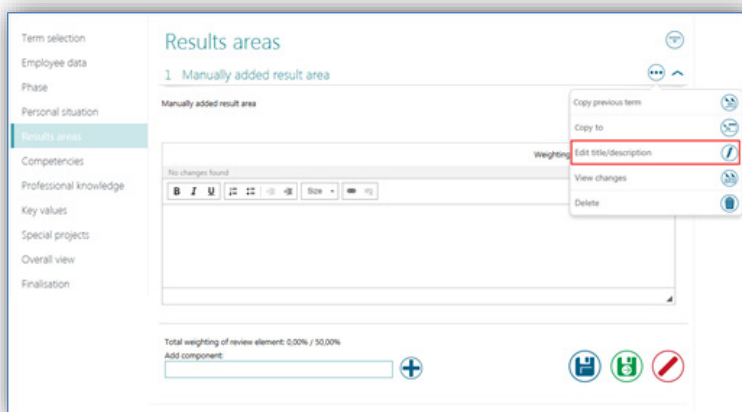
2. Editing manually added review meeting parts

Why

The review meeting parts from the HR cycle can be added manually from the job profile, but they can also be added automatically by a user who has authorization for this. However, the title and the description of the manually added review meeting parts could not be edited afterwards.

How

Once this release has been installed, you will also be able to change these review meeting parts. Authorized users will get a new action button that enables them to edit the name and the title of the review meeting part in question. See the illustration below.



The action button calls up a new window where you can update the details referred to. This functionality is available with the manually added components related to results areas, professional knowledge and special projects.

Your action

You do not have to activate this function separately. Users who are authorized to manually add review meeting parts will also have the new action button available to them.

3. Do not show empty review meeting parts in a report

Why

Lots of organizations leave it up to the manager or employee to choose which review meeting parts they make agreements about. They will sometimes select only two of the five job-related results areas and agree that the other three are not relevant for the current term. However, since all the parts should remain visible in the HR cycle, removing them is not always a good idea. For transparency's sake, it is helpful for the user if only the review meeting parts that have been filled in are shown in the report. And since this also helps save paper, it is also useful from a sustainability perspective.

How

When this release has been installed, you will have the option to indicate on an organizational level whether empty review meeting parts should be shown or should not be shown in the HR cycle reports. If you choose for the latter option, the actual HR cycle will still show all the review meeting parts (both empty and filled), but the HR cycle reports (PDF) will only show the parts that have been filled in.

Your action

A new option, *Show empty review parts in PDF* is available in *Settings | Other Settings*. This option is on by default. You can activate the above operation by deselecting this option.

Release Notes

Performance

Management

Release 201611

Contents

New	3
1. Indication of review meeting parts used	3
Solved Messages	4
2. Incomplete filter name in HCM grid (change 69346)	4
3. Incorrect manager name when signing by employee (change 4361)	4
4. Other findings resolved	4
Prior announcement	5
5. Improved user interface for HR cycle	5

This document contains a description of the new functionality and improvements introduced by this release. Some of these changes have been inspired by messages from our customers. Where relevant, we have included a number to refer to our internal system in which we record messages from customers.

New

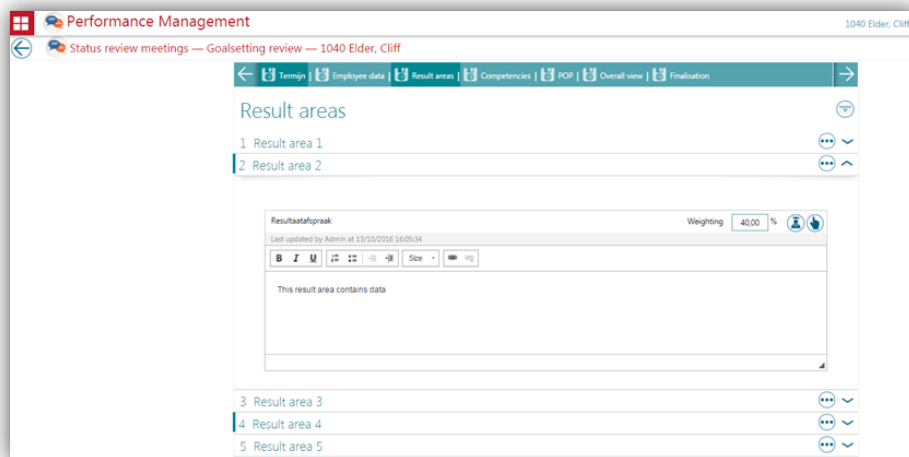
1. Indication of review meeting parts used

Why

Some organizations leave it up to the manager/employee to choose which review meeting parts they make agreements about. They will sometimes select only two of the five job-related result areas and agree that the other three are not relevant for the current term. However, since all the parts should remain visible in the review meeting report, removing them is not always a good idea. In order to properly support this process, it will be useful for users if they can see which review meeting parts actually contain agreements and which do not.

How

With effect from this release, the system is able to use colour marking to indicate which review meeting parts contain agreements and which do not. The result areas preceded by a block contain agreements.



Your action

You will have to activate this functionality if you wish to use this colour marking feature. Go to:

- Menu > Settings > Other settings > Use colour marking for used review parts

Solved Messages

2. Incomplete filter name in HCM grid (change 69346)

Message

The HCM Grid contains the *Include employees in the grid* filter. This filter name was not shown in its entirety.

Solution

You will again see the full text with effect from this release.

3. Incorrect manager name when signing by employee (change 4361)

Message

If a department has several managers, the name of the manager who had signed was not always stated correctly in the screen the employee was meant to sign. The PDF did contain the right name.

Solution

With effect from this release, the screen the employee has to sign contains the name of the correct manager.

4. Other findings resolved

Changes 60624, 67902, 68847, 71075, 71141, 4233, 67907, 71722, 4015, 5260, 71799, 3396, 68897, 68994

Prior announcement

5. Improved user interface for HR cycle

In mid-December we will deliver an improved user interface for the HR cycle. We will replace the existing green/blue horizontal bar that contains the review meeting parts by a vertical menu. This will show you at a glance which steps you have to take and will make it easy to switch between review meeting parts. The figure below shows a provisional draft of the new user interface. The definitive user interface may differ slightly.



(Note: this picture is not yet available in English)

Release Notes Performance Management

Release 201610

Content

Content	2
New	3
1. Copying results agreements from the previous term	3
Solved messages	7
2. Export Employees Performance Summary (change 4804)	7

This document describes the new functionality and improvements introduced by this release. Some of these changes have been inspired by messages and reports from customers. Where relevant, we have included a number in the section title to refer to the identification of the message (change) in question in our system.

New

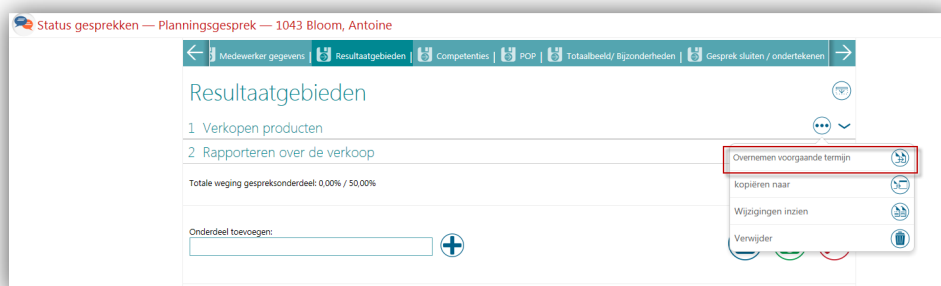
1. Copying results agreements from the previous term

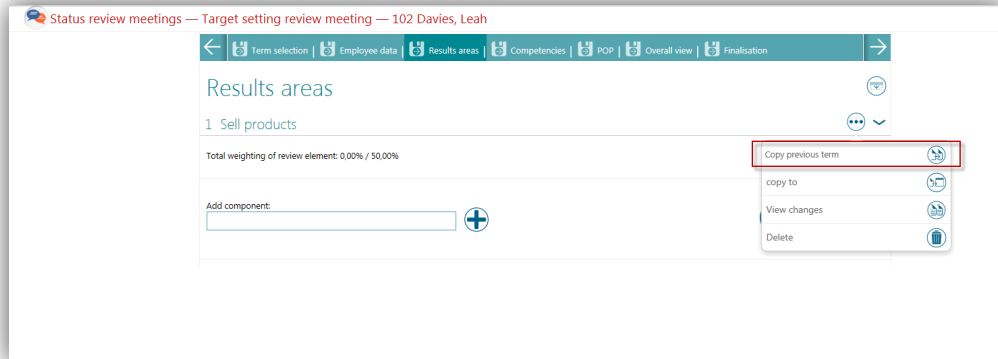
Why

Results agreements are established on the basis of the job profile or on the basis of a manager's or employee's input. These results agreements are often valid for several years. Although you can automatically add the review meeting parts from the job profile, the ease of use would be improved if you could also copy the added review meeting parts from a previous term of an employee.

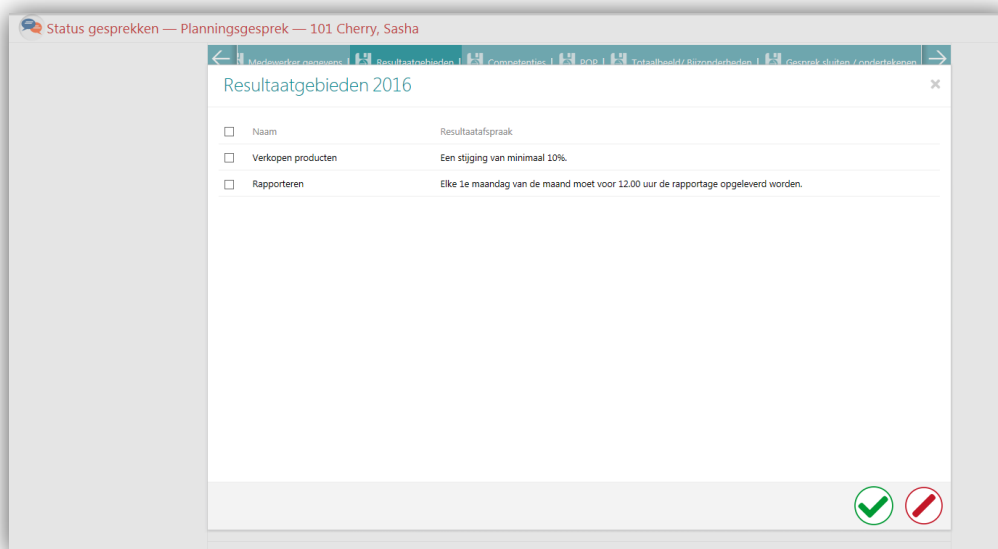
How

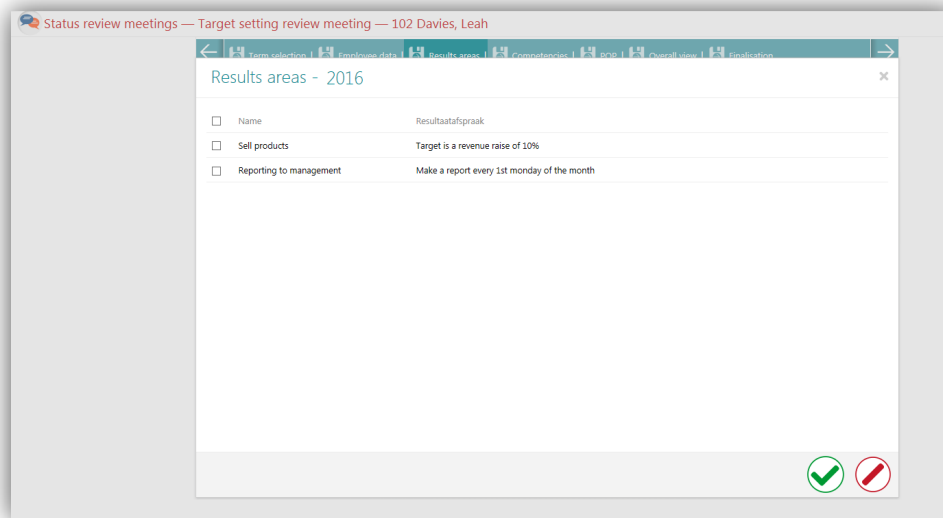
A new option, i.e. *Take over previous term* has been added to several parts of the cycle (results areas, competencies, professional knowledge, key values). You can find this option under the **More** button.





Clicking this button opens a pop-up with the relevant review meeting parts of the previous term:





Here you see the name of the part in question - the results areas in the picture shown - and the results agreements made for this in the previous term. Select the parts that you wish to copy to the current term in this screen and then click **Save** (green checkmark).

If the review meeting part in question is already present in the current term (e.g. based on the job profile), the system will add the results agreement to any existing results agreement. The weighting (if applicable) does not change.

If the review meeting part in question is not present in the current term yet, the system will copy it, including the results agreement, to the current term, with a weighting (if applicable) of 0.

Training programmes, preconditions and action plans are never copied over.

Note: you can only use this function if at least one review part is available for every review meeting part. If applicable, you can first add it manually.

Your action

Settings > Configuration panel > Access levels

The availability of the button to copy agreements depends on the new *Copy agreements from the previous term* access level and you can make settings for every individual role.

Performance Management
Bewerk toegangsniveau - Manager

Beheer | Bewerk toegangsniveau - Manager

Inrichtingsconsole

- Eigen terminologie
- Inrichten gesprekscyclus
- Overige instellingen
- Toegangsniveaus

Inrichting

- Beheerders
- Bedrijfsonderdelen
- Competenties
- Kernwaarden
- Overzicht functieprofielen
- Afdelingen en gerelateerde
- Termijnen
- Extra vragen
- Opleidingen
- Dossier categorieën
- E-mail templates
- Reden beoordeling
- PDOL

Feedback

- Feedback instellingen
- Feedback vragen

Ondersteuning

- Gesprekswijzers

Naam		Manager				
Toegewezen Portal Rol		MGR				
Leidinggevende		<input checked="" type="checkbox"/> Medewerkers met dit toegangsniveau opnemen in de lijst van leidinggevenden				
Toegang		Medewerker Afdeling Onderliggende afdelingen Bedrijfsonderdeel Vestiging				
Algemeen						
Zoëfunctie		<input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>				
Medewerker(s)						
Welkom scherm		<input type="checkbox"/>				
Status gesprekken		<input type="checkbox"/> <input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>				
Toevoegen gespreksonderdelen uit functieprofiel		<input type="checkbox"/> <input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>				
Wijzigen weging gespreksonderdelen		<input type="checkbox"/> <input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>				
Verwijderen gespreksonderdelen lopende cyclus		<input type="checkbox"/> <input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>				
Verwijderen gespreksonderdelen lopend gesprek		<input type="checkbox"/> <input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>				
Wijzigen score gespreksonderdelen		<input type="checkbox"/> <input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>				
Afspraken overnemen voorgaande termijn		<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>				
Competentiedossier inzien		<input type="checkbox"/> <input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>				
Competentiedossier onderhouden		<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>				

Edit access level - Manager

Settings | Edit access level - Manager

Configuration panel

- Organization-specific terminology
- Configure HR cycle
- Other settings
- Access levels

Configuration

- Administrators
- Business units
- Competencies
- Key values
- Overview of job profiles
- Afdelingen en gerelateerde
- Terms
- Extra questions
- Training programmes
- File categories
- Email templates
- Reason for rating
- PDOL

Feedback

- Feedback settings
- Ask for feedback

Support

- Review guides
- FAQ

Name		Manager				
Portal Role assigned		MGR				
Manager		<input checked="" type="checkbox"/> Include employees with this access level in the list of managers				
Access		Employee Department Sub-departments Business unit Branch				
Algemeen						
Search Function		<input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>				
Employee(s)						
Welcome screen		<input type="checkbox"/>				
Status of review meetings		<input type="checkbox"/> <input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>				
Add review meeting parts from job profile		<input type="checkbox"/> <input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>				
Change weighting of review meeting parts		<input type="checkbox"/> <input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>				
Delete review parts for the ongoing cycle		<input type="checkbox"/> <input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>				
Delete review parts for the ongoing review		<input type="checkbox"/> <input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>				
Change score of review meeting parts		<input type="checkbox"/> <input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>				
Copy agreements previous term		<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>				
View competency file		<input type="checkbox"/> <input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>				
Maintain competency file		<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>				
View training programmes		<input type="checkbox"/> <input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>				

After installing the release, this access level has not been selected for any of the roles. You will have to activate the function yourself.

Solved messages

2. Export Employees Performance Summary (change 4804)

Message

When generating the summary of employee details in Settings > Export > Employees, a white screen would sometimes appear.

Solution

The performance has been improved and the summary is generated faster. This has made the white screen a thing of the past.

Release Notes Performance Management

Release 201609

Contents

Contents	2
Changed and improved	3
1. Improved multilingual functionality	3
2. Own terminology not implemented in the function profile (Change 63016)	3

This document contains a description of the new functionality and improvements introduced by this release. Some of these changes have been inspired by messages from our customers. Where relevant, we have included a number to refer to in our internal system in which we record messages from customers.

Changed and improved

1. Improved multilingual functionality

Why

Performance Management supports several languages. This multilingual functionality had not been implemented completely on some screens.

How

This release introduces the following improvements of the multilingual functionality:

- Translations on the feedback respondents screen
- Translations on the screen to read feedback
- The role names in the menu if a user has several roles
- Missing or incorrect translations on various screens
- The addition of translation buttons to enable you to record translations of your customer-specific details
- The addition of the possibility of translating email templates
- The addition of the possibility of translating the reason for a review score

Some further improvements will be implemented next month.

Your action

You do not need to take any action. The changes will be implemented automatically if you use the multilingual functionality.

2. Own terminology not implemented in the function profile (Change 63016)

Message

There are several elements in Performance Management where you can adjust the terminology to the situation in your organization. Unfortunately, this own terminology feature did not work fully in the My Job Profile function and when printing the profiles.

Solution

After installing this release, own terminology will be applied correctly.

Release Notes

Performance Management

Release 2016-08

August 1st 2016

Version 1.0

Contents

New	3
1. Feedback option No rating	3
2. Edit results agreements	4
3. Hide PDP learning objectives	5
Changed	7
4. Multilingual functionality improved	7
Messages resolved	8
5. Self-score feedback not shown correctly (changes 4145, 4299)	8
6. User role not updated correctly (change 3803)	8
7. Other findings resolved	8

This document contains a description of the new functionality and improvements introduced by this release. Some of these changes have been inspired by messages from our customers. Where relevant, we have included a number to refer to our internal system in which we record messages from customers.

This release contains new possibilities to let you adjust Performance Management to the wishes and requirements in your organization even more. Examples of this are the option to activate PDP learning objectives, the option to be able to adjust results agreements and the *No rating* option as part of feedback requests.

New

1. Feedback option No rating

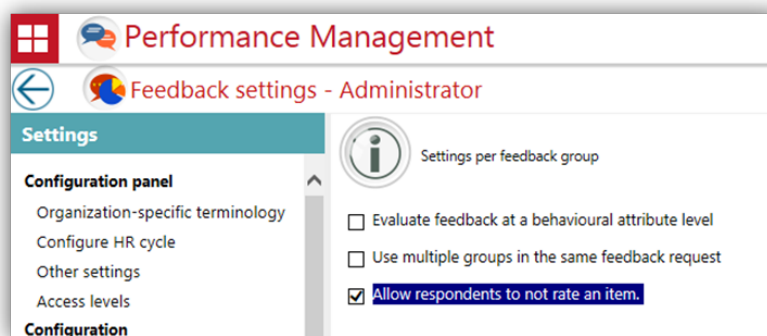
menu Management > Feedback settings

Why

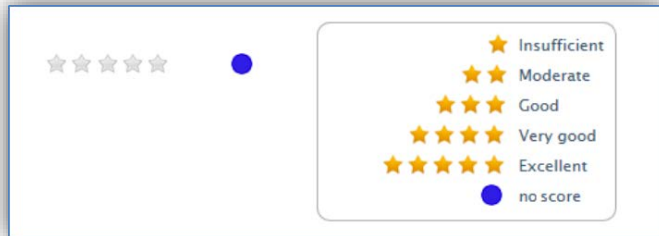
Performance Management lets you ask both internal and external users for feedback on your employees' performance. Previously, respondents had to answer all the questions, even if they did not really have anything definite to say about the subject of the question.

How

From now on, organizations can determine whether respondents who give feedback will get the *No rating* option when answering questions.



To enable this, the option *Allow respondents to not rate an item* has been added in Management > Feedback settings.



If you tick this option, a respondent will also see the option of *No rating* as one of the rating options.

This enables the respondent to indicate that they do not wish to or are not able to answer the specific question. The elements where the *No rating* option has been chosen will not be included in the calculations of the feedback summaries and the reports.

Your action

To use this new functionality, go to Management > Feedback settings and activate the option *Allow respondents to not rate an item*.

This option is **off** by default, so that respondents have to answer all the feedback questions.

2. Edit results agreements

menu Management > Other Settings > Settings

Why

As part of the review cycle, the employee and you make agreements on objectives and areas of development that the employee will work on in the period in question. Since priorities and areas of attention may shift, you can change these agreements in later reviews.

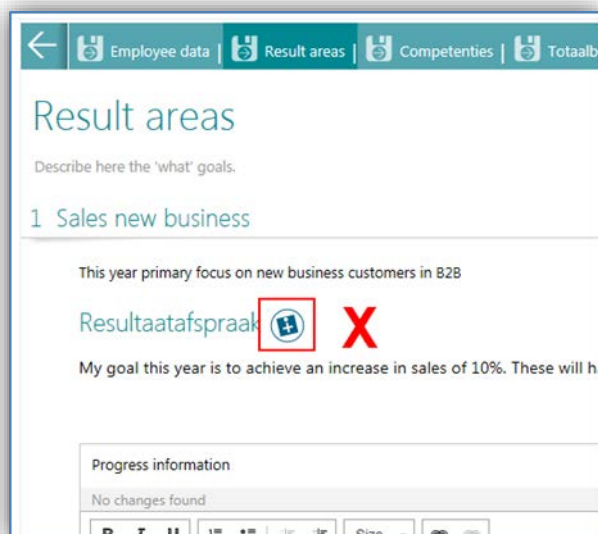
However, some organizations would like to be able to freeze the agreements made. This was not possible yet.

How

From now on, the organization can indicate whether it is OK for agreements in the review cycle to be changed during a later review meeting, or whether the agreements should be frozen after the first review meeting.

To enable this, we have added the *Adjusting result agreements during review cycle* option to the Management > Other Settings > Settings function.

If you opt to freeze agreements, you will no longer be able to change the agreements made during the target setting review meeting at a later time, e.g. during the progress review meetings. Of course, you are still able to record the regular explanations for the progress review meetings.



If you have opted to freeze agreements, there will not be an **Edit** button for the results agreements or improvement actions. This applies to all the review meeting parts such as objectives, competencies, key values, professional knowledge, etc.

Your action

If you wish to freeze the agreements that have been made, go to Management > Other Settings > Settings and remove the check mark for the *Adjusting result agreements during review cycle* option.

This option is **on** by default, enabling the agreements made to be changed.

3. Hide PDP learning objectives

menu Management > Other Settings > Settings

Why

As part of the PDP functionality, you can use learning objectives in order to achieve the employee's specific development plans.

However, some organizations use the PDP functionality differently, without any concrete learning objectives. If so, we advise switching off the functionality for learning objectives so that the function will be more transparent for the employee.

How

From now on, the organization can decide whether it wishes to use PDP learning objectives or to not use them.

To enable this, we have added the *Hide PDP learning objectives* option to the Management > Other Settings > Settings function.

POP **Learning objectives activated**

1 : POP question 1

B I U [bullets] [numbered] [link] [unlink] [Size] [font color] [font background color]

Learning objectives and action plans

Learning objective	Action plan		When		Cost	Current status
	Activity	By whom				
Leerdoel 1	Activiteit 1	Medewerker	1-9-2016	0,00	Lopend	<input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>

2 : POP question 2

B I U [bullets] [numbered] [link] [unlink] [Size] [font color] [font background color]

POP **Learning objectives inactive**

1 : POP question 1

B I U [bullets] [numbered] [link] [unlink] [Size] [font color] [font background color]

2 : POP question 2

B I U [bullets] [numbered] [link] [unlink] [Size] [font color] [font background color]

If you activate this option, the PDP learning objectives will immediately no longer be visible in the current review cycles and in the review meeting reports that are to be generated. Of course, any existing PDFs will not be changed.

Your action

To switch off PDP learning objectives, go to Management > Other Settings > Settings and tick *Hide PDP learning objectives*.

This option is **off** by default, so that you do see the PDP learning objectives.

Changed

4. Multilingual functionality improved

Why

Performance Management supports several languages. However, this functionality had not been fully implemented on all screens.

How

This release introduces the following improvements:

- CTA buttons have been translated.
- Any emails initiated by the system are sent in the right language. This is the default language that has been selected at the organizational level.
- Missing translations have been added and incorrect translations corrected on various screens.
- Translation buttons have been added to enable you to record your customer-specific details

These are the first changes that have been made in this context. We will also implement improvements in future releases.

Your action

You do not have to do anything. If you use the function for multiple languages, you will see the relevant changes in the screens.

Messages resolved

5. Self-score feedback not shown correctly (changes 4145, 4299)

Message

If organizations did **not** make use of *teams* in Performance Management, the self-score value was indicated as **-1**, although these ratings had been filled in.

It was also possible that a rating would be displayed even though it had not been made final yet.

Solution

Performance Management has been changed to ensure that the self-score ratings in the feedback summary and the related reports are shown correctly.

6. User role not updated correctly (change 3803)

Message

The roles of users in Performance Management would sometimes not be updated correctly. As a result, a user could continue to have the role of manager, even if this was no longer applicable.

Solution

This has been resolved. The current user roles, as present in User Management, are now processed correctly in Performance Management.

7. Other findings resolved

Besides the above messages, some minor findings have also been resolved. Feedback on them will be given in the usual way.

Release Notes

Performance Manage- ment

Release 2017-07

9 July 2016

Table of contents

New in this release	3
1. Own selection of the sequence of review meeting parts	3
Messages resolved	3
2. There was no Edit employee icon for advanced search (change 65390)	3
3. Unwarranted authorization for deleting Extra interviews (change 4046)	4
4. Selecting terms that are not open when requesting feedback (change 4031)	4
5. Other findings resolved (change 3725, 3726)	5

This document contains a description of the new functionality and improvements introduced by this release. Some of these changes have been inspired by messages and reports from customers. Where relevant, we have included a number in the headings of individual subjects to refer to our internal system in which we record messages from customers.

New in this release


1. Own selection of the sequence of review meeting parts

Why

Organizations need an HR cycle that seamlessly matches their internal processes. Setting up customer-specific terminology, review meetings, and review meeting parts was already possible. However, you could not edit the sequence of the review meeting parts within the review meetings.

How

From this release onwards, you will be able to change the sequence via Settings > Configuration panel > Configure HR cycle. This sequence applies to all review meetings and it will take effect when a new HR cycle is started for the employee. This means that any ongoing HR cycles will not change.

As soon as you move the mouse over the review meeting parts that can be repositioned, the mouse pointer will change into a movement icon . You can move a review meeting part by clicking the left-hand mouse button on it, pressing and holding the button, and dragging the review meeting part up or down.

Within the boundaries of the default layout, this sequence also applies to the presentation in the review meeting reports.

Messages resolved

2. There was no Edit employee icon for advanced search (change 65390)

Message

The *Employee overview* screen features an icon that lets you navigate to the page in order to change an employee's details.

However, the Advanced search functionality did not show this icon with the search results and, as a result, it was not possible to use this in order to make changes.

Solution

This icon is visible again with effect from this release, provided that you are appropriately authorized (fig. 02).



fig. 02

3. Unwarranted authorization for deleting Extra interviews (change 4046)

Message

Besides the review meetings as part of the HR cycle, you can record extra interviews in Performance Management. You can give users authorization for reading and/or editing these interview details in this screen.

However, users who only had reading rights to the Extra interviews could also remove the interview.

Solution

From this release onwards, the **Delete** button will only be available to authorized users.

4. Selecting terms that are not open when requesting feedback (change 4031)

Message

Settings > Configuration > Terms lets you record which terms are open for the HR cycle and for giving feedback.

Users should not be able to select any terms where this option is off in the HR cycle and when requesting feedback.

However, users could choose all terms when requesting feedback instead of only the terms that were open.

Solution

From this release onwards, users will only be able to select the terms that were opened by your organization.

5. Other findings resolved (change 3725, 3726)

Besides the changes listed above, some minor findings have also been resolved. Feedback on them will be given in the usual way.