

Release Notes Performance Management

Release 2017-09

Version 1.0

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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 in question (change) in our system.

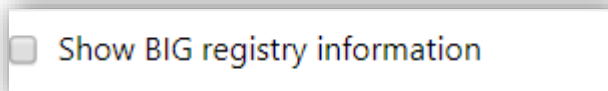
New

1. New option to enable BIG registration feature

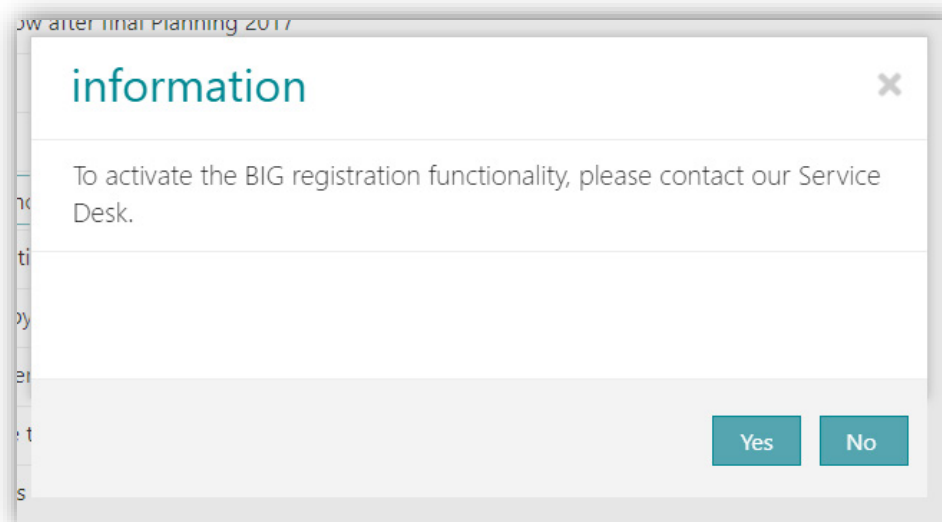
Message

There is a new setting added in the 'Other settings' section to allow admin to enable/disable BIG registration feature.

By default this option will be disabled. Once you enable this option a message will be shown to contact the Service Center to import the data related to BIG registration.



After enabling the checkbox a confirmation box is shown.



Via *Youforce | Service Plaza | Support* you can submit a request for this. Please mention as title: *Registration BIG*.

Solution

This new option has been added to enable BIG registration functionality.

2. Changes to the import process of the BIG register

Message

A new background process has been created to import the BIG registration values for employees.

The import process has been modified to get the necessary information of the BIG registration for employees who have enabled the BIG registry.

Solution

BIG registration information will be imported for authorized employees.

3. Certificates which are about to expire

Message

There is a new setting added in the 'Other settings' section to allow admin to setup a reminder and frequency for certificates expiry.

You can configure whether you want to receive reminder emails when certificates are about to expire. This reminder email is used for normal and BIG registration certificates. By default the reminder expiration date frequency is set to 15 days. The setting below will result in an email every 15 days, starting 60 days before the expiry date.

Reminder expiration date certificates	<input type="radio"/> No <input checked="" type="radio"/> Yes
Reminder expiration date frequency	<input type="text" value="15"/> Days
Number of days before sending a reminder due to expiry of validity	<input type="text" value="60"/> Days

Solution

A new option to send reminder emails for certification expiry has been added.

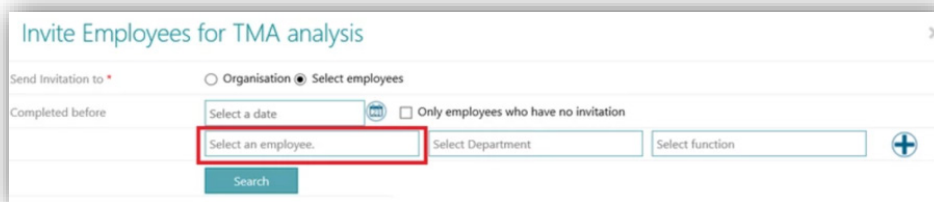
4. Search on name for employee TMA analysis

Message

I can't search on an employee name for TMA analysis.

Solution

A new option has been added in TMA. You can now invite employees for TMA analysis by searching on their name.



Invite Employees for TMA analysis

Send Invitation to * Organisation Select employees

Completed before Only employees who have no invitation

5. Show TMA competency code in Performance and Skills management

Customers who have TMA enabled will now be able to see the TMA code in Performance and Skills management.

In Performance management this is on the competency overview screen

Analyseren (niveau 3)	TMA39	8	<input type="button" value="Change"/>
Analyseren (niveau 4)	TMA40	5	<input type="button" value="Change"/>

In Skills management on the overview screen

Analyseren (niveau 3)	TMA39
Analyseren (niveau 4)	TMA40

Solved Messages

6. Agenda email being sent multiple times (Change 363325)

Message

When a manager tried to set up a review agenda for new employees, emails were sent to employees who had already received an email.

Solution

The change results in only sending emails to employees whose agenda was recently set up.

7. Import of standalone managers (Change 367679)

Message

In some cases the import of managers was rejected because of invalid data.

Solution

After an investigation we discovered that the data was not invalid, but that the import process had to be changed. As a result of this we made some changes in this process which will now result in a successful import.

Release Notes Performance Management

Release 2017-08

Version 1.0

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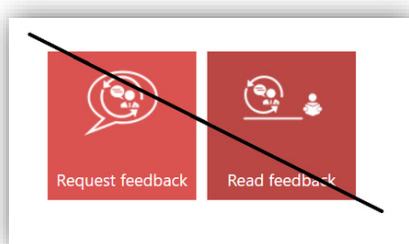
This document describes the new functionality and improvements introduced by this release. Some of these changes have been inspired by messages and reports from customers. Where relevant, we have included a number in the section title to refer to the identification of the message in question (change)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

Changed and Improved

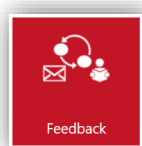
1. Removal of Feedback request tile

Message

The existing feedback request tile has been removed as the user can now request feedback using the new Feedback tile (This tile will now contain both read and request options).



A new Feedback tile has been provided as shown below.



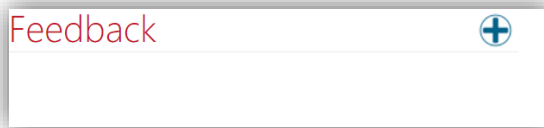
Solution

Two Feedback tiles have been merged into a single one where both the option of initiation and reading saved feedback is possible.

2. New feedback request

Message

Users can add new Feedback requests by clicking on the icon which is available within the new Feedback tile as shown below.



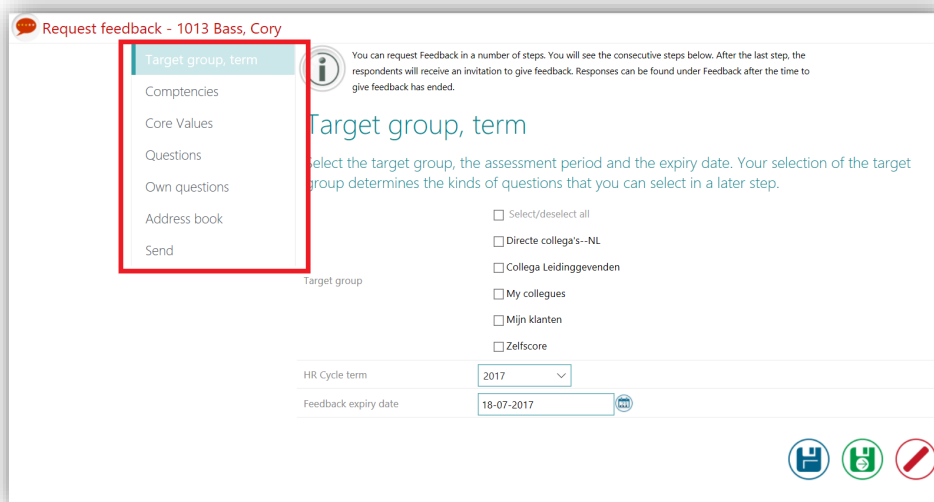
Solution

Users can use the '+' icon to initiate new Feedback for employees.

3. UI Enhancements in feedback module

Message

A new enhanced and simplified UI for the feedback module has been provided (In-line with the Review module).



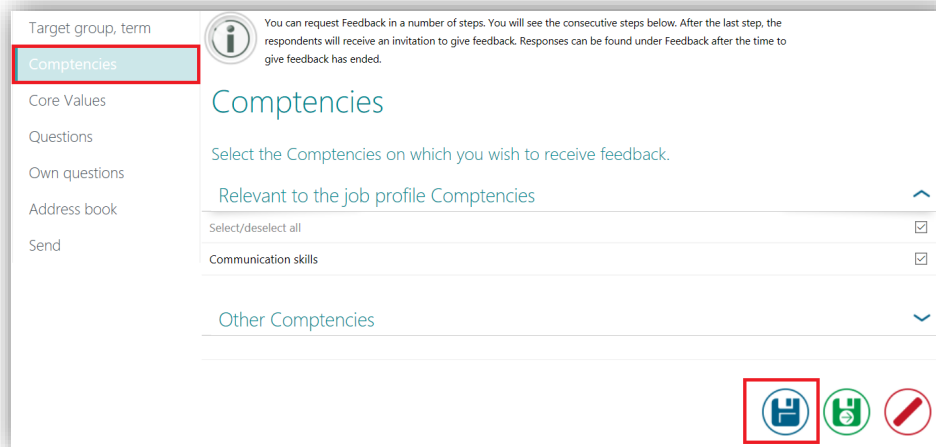
Solution

The UI for the Feedback initiation has been changed and we now show vertical menus instead of horizontal ones.

4. New options to save feedback

Message

Users can now save the feedback information by clicking on the options highlighted below.



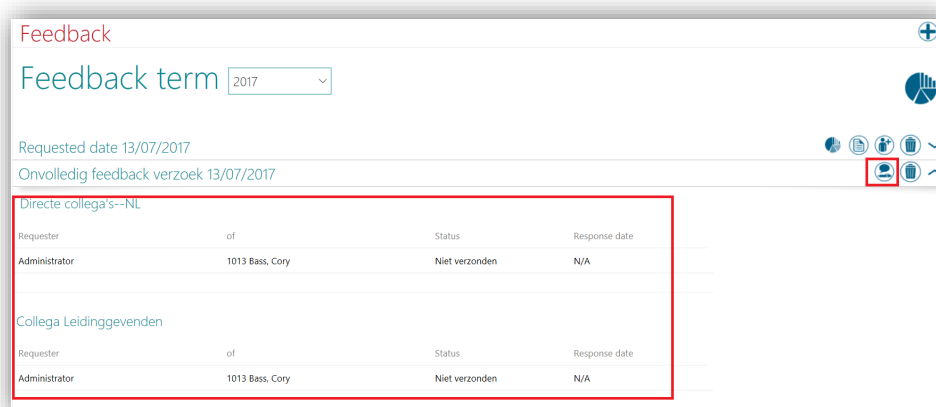
Solution

Users can now save the feedback by clicking on either tab, save (blue colour image) or save and continue (green colour image)

5. Option to Save and Continue feedback

Message

A new edit icon has been provided in the Feedback tile where users can continue the saved feedback. The saved Feedback group information has been provided as shown in the image below.



Solution

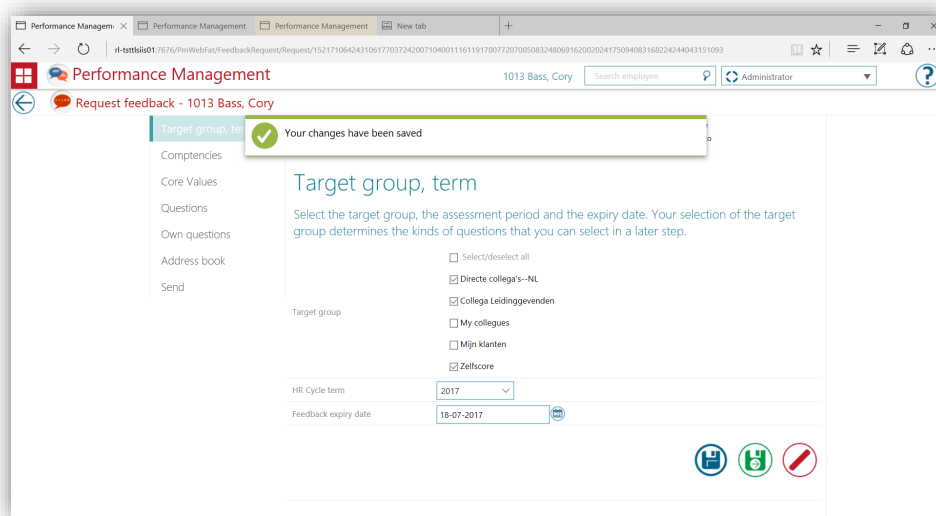
A new edit icon is provided where users can continue editing saved feedback.

6. New way of showing success and error messages

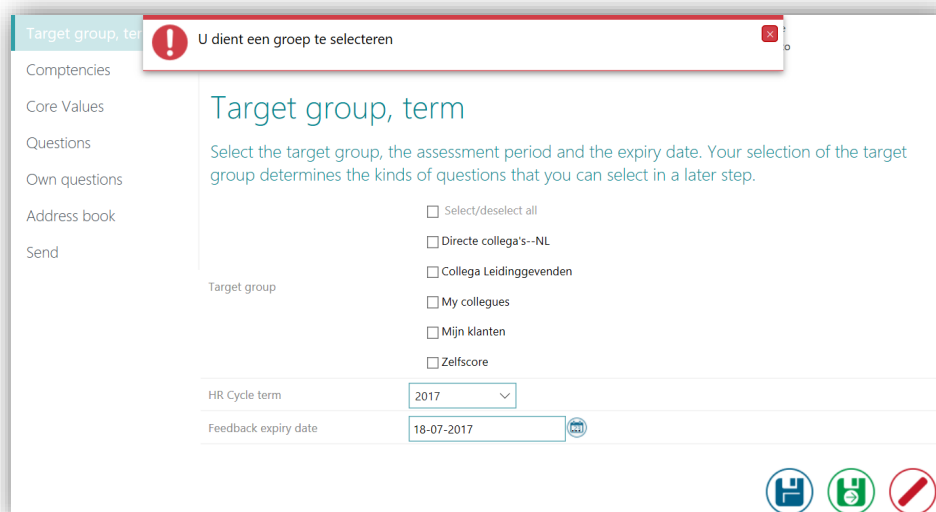
Message

We have provided a new option for showing Success and Error messages:

Success -



Error -



Solution

Similar to feedback response screen, we have provided a new way of showing success and error messages.

Solved Messages

7. Wrong name shown in feedback response screen (Change 332909)

Message

When submitting a feedback response for an employee, some cases were reported where a different employee name was shown.

Solution

The changes made now result in the proper employee name being shown.

8. Issue with saving Individual goals (Change 340162)

Message

There is some inconsistent behaviour when saving individual goals for an employee. When a user tries to add/edit goals, either from the review tab or from the individual goal tab, data is sometimes saved and sometimes not saved.

Solution

The changes made result in the individual goals being saved correctly.

9. Issue with updating managerial role to employee (Change 340166)

Message

Even though a manager does not have any employees under them, they are still shown as a manager in the module.

Solution

If a manager does not have any employee under them, the changes made result in an updating of the managerial role to employee.

10. Digital signature icon not shown for some employees (Change 361532)

Message

Even though the first manager has signed the review of an employee, the newly added icon is not shown in the overview screen.

Solution

The changes made have resulted in the icon being shown when the first manager has signed the review.

11. Issue in saving feedback response for several users (Change 362796)

Message

Several users reported that when they are trying to give feedback via the response screen, the scores are not being saved.

Solution

The changes made have resulted in the feedback results being saved.

Release Notes Performance Management

Release 2017-07

Version 2.0

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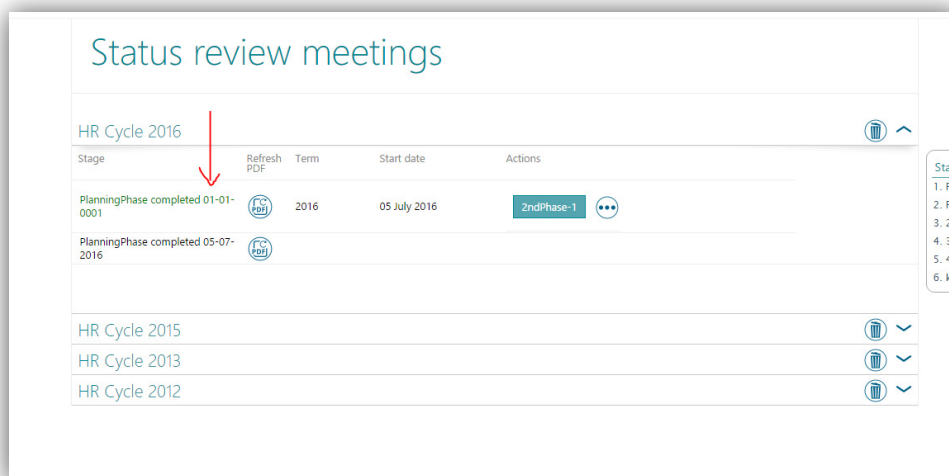
This document describes the new functionality and improvements introduced by this release. Some of these changes have been inspired by messages and reports from customers. Where relevant, we have included a number in the section title to refer to the identification of the message in question (change)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

Changed and Improved

1. Issue with name review phase when reopening using other languages

Message

After re-opening a status of a review meeting in a language other than Dutch, the name does not display the correct date.



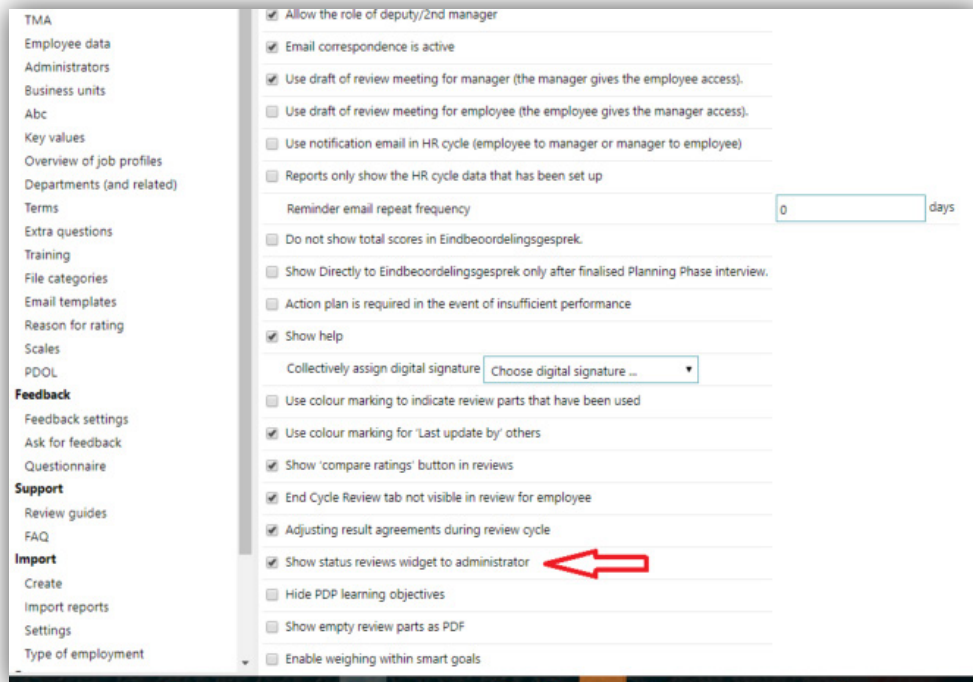
Solution

The date will be shown properly in all languages now.

2. Ability to also show/hide widget for the Admin role

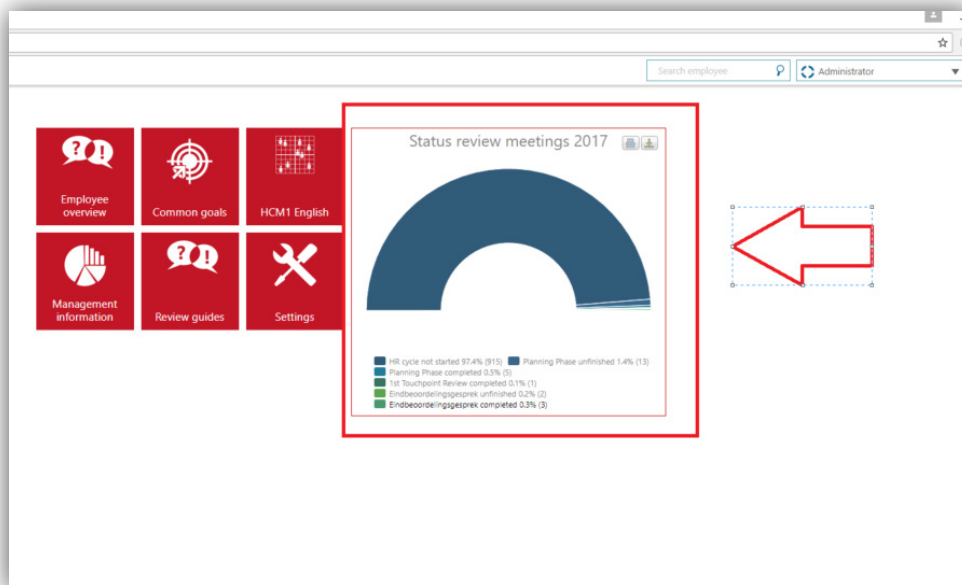
Message

Administrators are not able to select whether the review widget is loaded or not.



Solution


The option has been added. Enabling this under settings will display the wizard on the administrator's landing page.



3. Performance improvement for the Department Overview

Message

The performance of the Department Overview needed to be improved.

 You can use the data item 'Team' to subdivide employees according to your own preference. 'Team' is also a selection criteria in the various reports.
 The departments (organizational units) you see here have been imported from your HR System. You can automatically add new departments by re-importing data from your HR System. Employees and managers are linked to a department.

Departments Teams

Zoeken:

Code	Department	Number of employees in department	Number of employees in underlying departments	Actions
10029862	152-Food	1	1891	Change
10631452	153-Document Control	82	0	Change
10631454	154-Commerce	16	0	Change
10631459	155-Human Resources	1	3	Change
10631470	156-Business Administration	21	0	Change
10631471	157-Entertainment	27	0	Change
10631473	158-Transport	11	0	Change
10631475	159-Purchasing	268	0	Change
10631479	160-Business Administration	12	0	Change
10631487	161-Finance	3	0	Change
10631489	162-Chemical	1	1	Change
10631491	163-Commerce	4	0	Change
10631492	164-Production	1	0	Change
10631493	165-Finance	1	0	Change
10631494	166-Purchasing	2	0	Change

Eerste Vorige 2 3 4 5 Volgende Laatste

[New department](#)

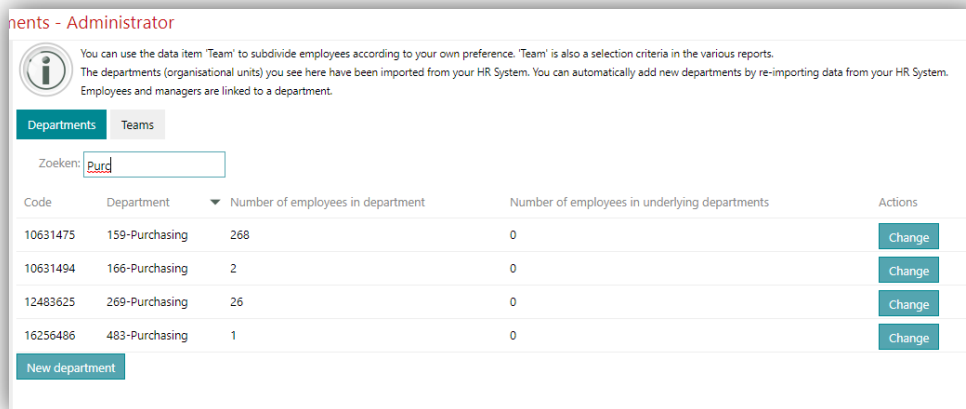
Solution

The changes made have improved the loading of the page significantly.

4. Performance improvement for the Department search

Message

The performance of the Department search needed to be improved.



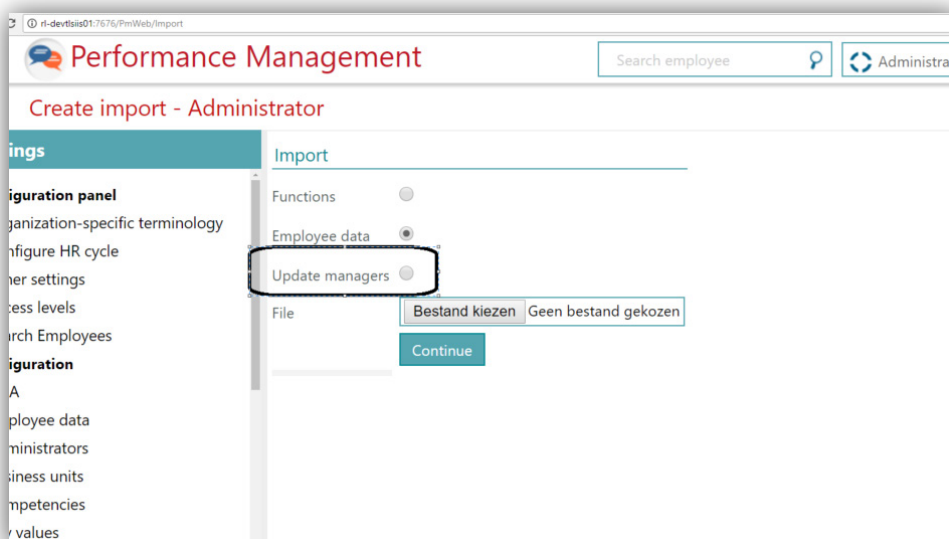
Solution

The changes made have improved the loading of the page significantly.

5. Updating multiple employees with the same manager in bulk

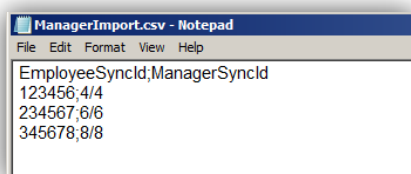
Message

A bulk import mechanism was required for customers that do not use a HR Core application (Stand alone users) to enable updating multiple employees with the same manager in bulk.



Solution

This option has been added to both Performance Management and Learning Management.



















The format of the CSV-file should look like this.

6. The personnel number search has been changed in the advanced search screen

Message

To search for an employee in the advanced search screen, you had to enter the full personnel number.

Employee number	2				
Job title	All				
Team	All				
Business unit	All				
Manager	All				
Department	All				
Employment Status	Employed				
<input type="button" value="Search"/>					
Name	Job title	Status	Term	Relationship	Actions
102 Melendez, Daisy	Functie 333-Physics	Planning Phase completed	2017	-	 
1036 Bell, Lucia	Personnel Administrator	Planning Phase unfinished	2019	-	 
1053 Ly, Angelo	Functie 333-Physics	Eindbeoordelingsgesprek - ended prematurely	2015	-	 
1091 Solis, Lucy	Functie 676-Purchasing	Eindbeoordelingsgesprek - ended prematurely	2015	-	 
1096 Conway, Rosa	Functie 676-Purchasing	Eindbeoordelingsgesprek - ended prematurely	2015	-	 
1097 Ventura, Pauline	Functie 353-Social Works	Eindbeoordelingsgesprek - ended prematurely	2015	-	 
1127 Fletcher, Cassandra	Payroll Personnel Administrator I	Eindbeoordelingsgesprek - ended prematurely	2015	-	 
1130 Banks, Buddy	Payroll Personnel Administrator I	Eindbeoordelingsgesprek unfinished	2014	-	 

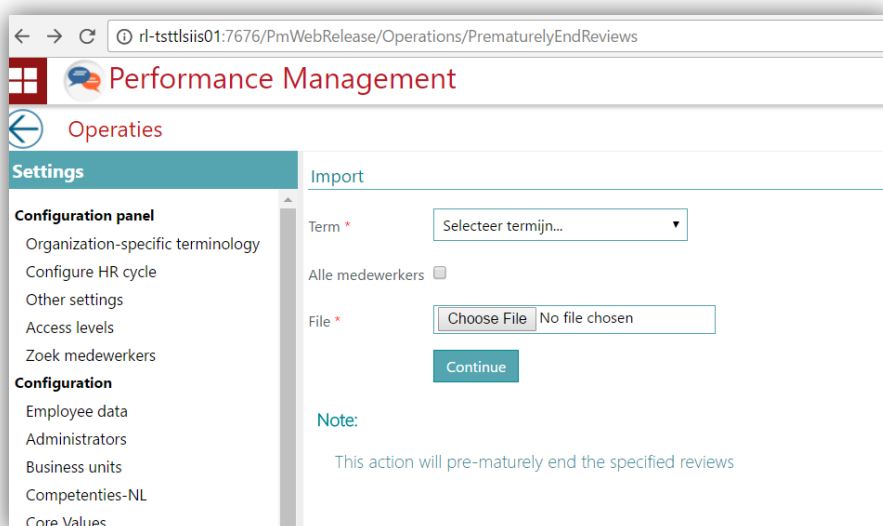
Solution

In the advanced search screen you now can search for an employee by entering only a part of the personnel number.

7. Prematurely end review cycle for employees for a selected period (bulk function)

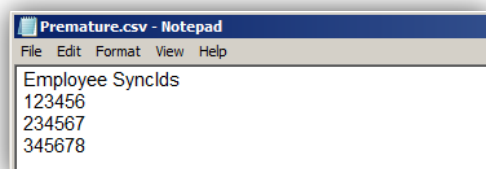
Message

An option was required to end review cycles prematurely in bulk based on the selected period (term). The authority level for this must be Admin.



Solution

For this option, the link for adding the required file will only appear when the setting *BulkReview* is enabled for the customer.



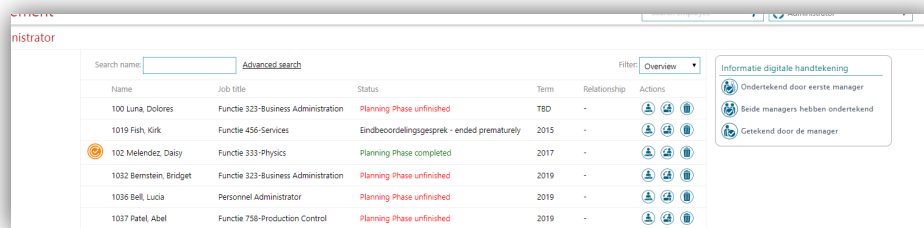
The CSV-file should look like this.

To process this file, please contact our Service Center online via an ITRP request.

8. Add new indicators for the digital signature status of reviews

Message

A review is signed digitally by a manager. However, it was not clear who had signed; whether it was done by the first manager, the second manager or both. An indicator was required.



Name	Job title	Status	Term	Relationship	Actions
100 Luna, Dolores	Functie 323-Business Administration	Planning Phase unfinished	TBD	-	[Icons]
1019 Fish, Kirk	Functie 456-Services	Einbeoordelingsgesprek - ended prematurely	2015	-	[Icons]
102 Melendez, Daisy	Functie 333-Physics	Planning Phase completed	2017	-	[Icons]
1032 Bernstein, Bridget	Functie 323-Business Administration	Planning Phase unfinished	2019	-	[Icons]
1036 Bell, Lucia	Personnel Administrator	Planning Phase unfinished	2019	-	[Icons]
1037 Patel, Abel	Functie 758-Production Control	Planning Phase unfinished	2019	-	[Icons]

Informatie digitale handtekening

- Ondertekend door eerste manager
- Beide managers hebben ondertekend
- Ondertekend door de manager

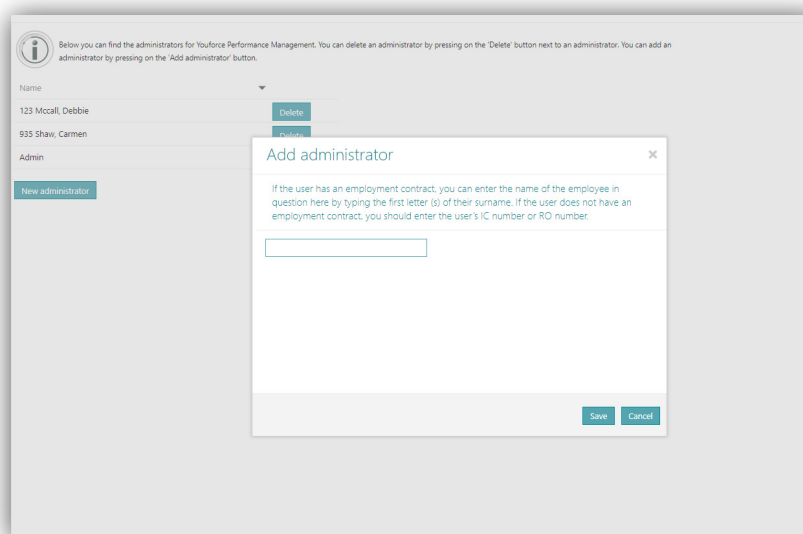
Solution

In the overview screen, you now have a new legend available where icons are shown to indicate who has digitally signed the review.

9. Performance improvement when adding an employee as administrator

Message

The performance of the page where you set an employee for the Admin role needed to be improved.



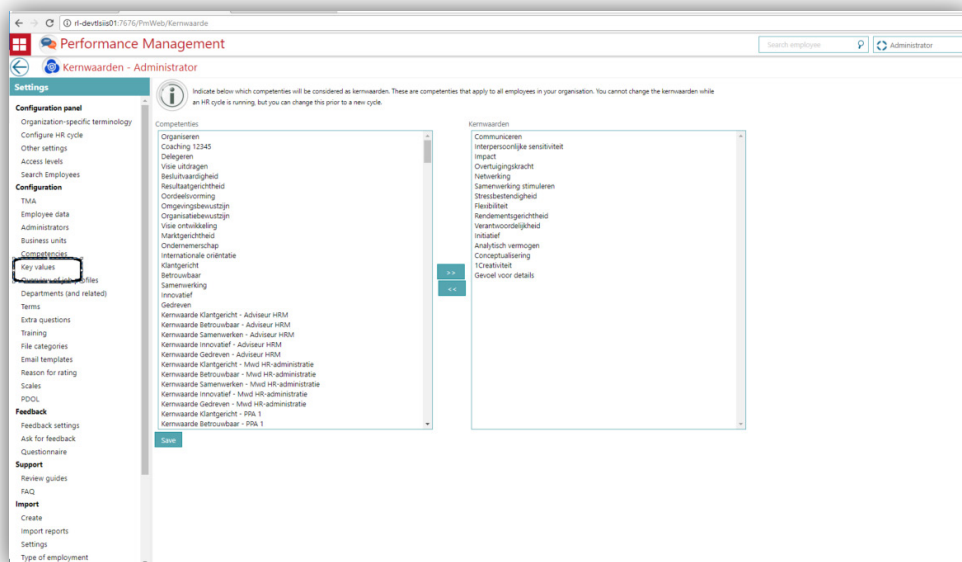
Solution

To search for an employee, you now only need to enter three characters or more to see the filtered list of employees. The loading of the page has also been improved

10. Performance improvement when adding a competency as a core value

Message

The performance of the page where you add competences as core values needed to be improved.



Solution

The changes made have improved the loading of the page significantly.

11. Link Settings on the Import settings screen are not required for HR Core Education users

Message

This link was confusing for HR Core Education users since an import rejection email is not sent for this HR Core application.

Solution

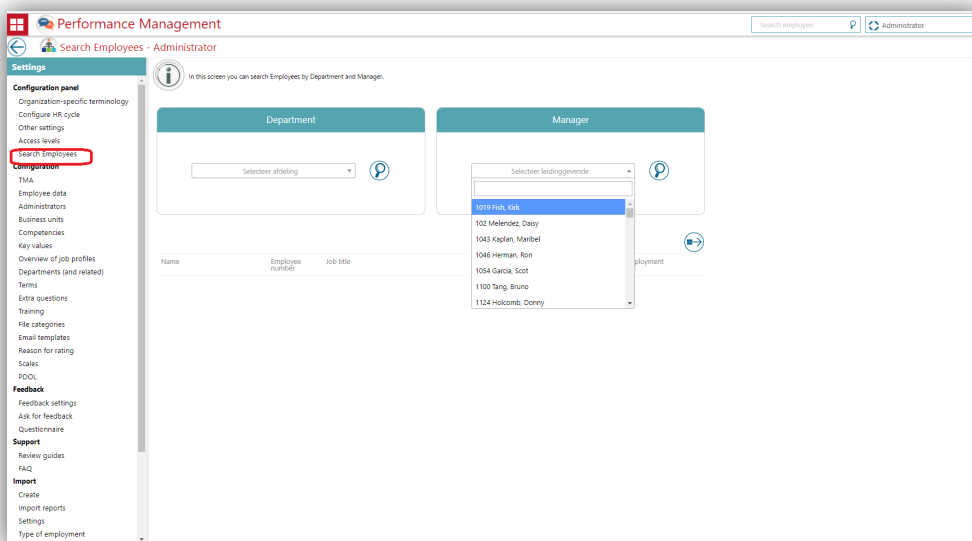
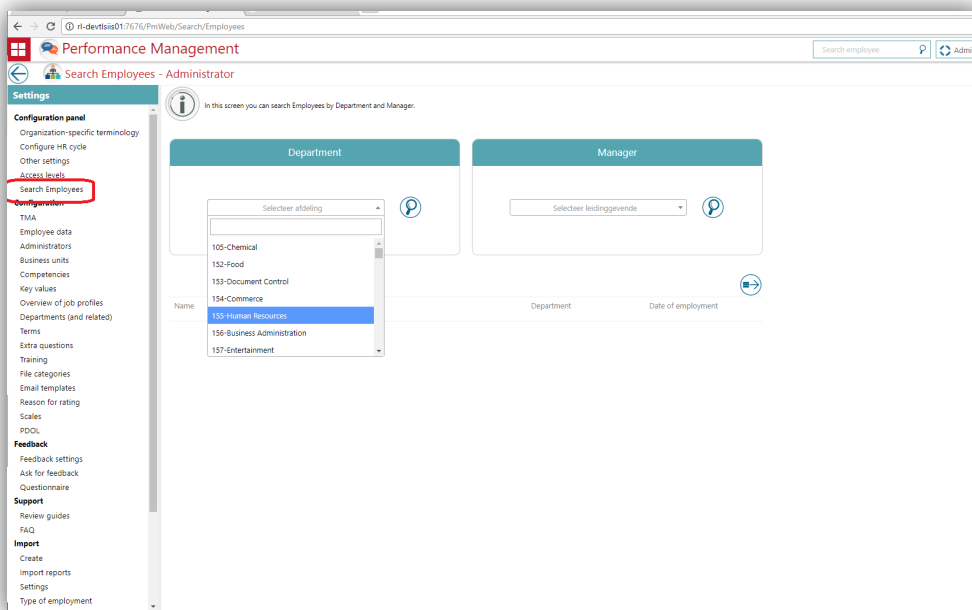
When used by HR Core Education customers, this link will not appear anymore.

12. New screen to show employees per department or manager

Message

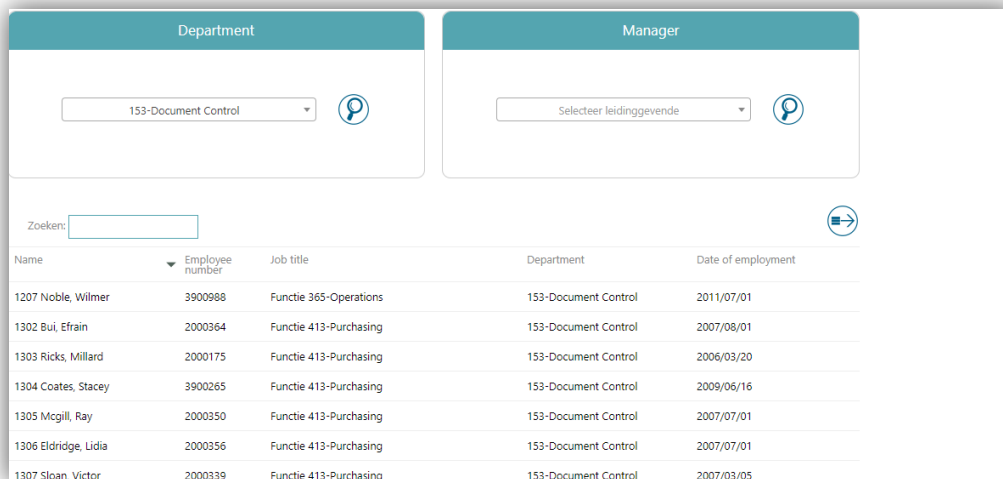
The employee in his/her Admin role needed to have an overview on all employees per department or per manager. Besides this overview, an export function was requested.

Solution



The new screen is available in the Settings screen. Here the administrator can search for all the employees under a specific department or under a specific manager. It is an 'OR' search where only one of the search filters will work at any one time.

When selecting a department the manager field will be cleared and vice versa.

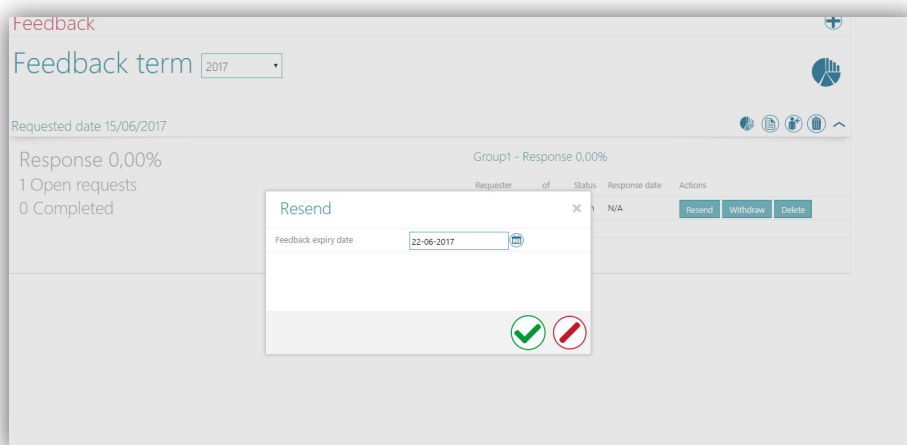


An export to Excel option is also offered on this page. A single click on the button will export the search result as an Excel-output.

13. Feedback expiry date now easy to (re)set when feedback is resent

Message

Users were not able to resend the feedback request when the feedback was expired.



Solution

A new pop-up is shown when the re-send is started and the feedback has expired. The user is now able to select a new deadline date before re-sending the request for feedback.

Solved Messages

14. Button to start final interview not available for employee (while authorized) (Change 188970)

Message

Although authorized, the button to start the final interview was not available for employees. This only occurs when customers are only having the final phase enabled.

Solution

The changes made result in the proper way to start the final interview.

15. When printing 'Gesprekswijzers' there is always a blank page at the end (Change 189947)

Message

When using Internet Explorer, printing Gesprekswijzers always resulted in a blank page at the end.

Solution

The print functionality has been optimized, so that no extra page will now be printed.

16. HTML print of interview always has an empty page at the end (Change 199254)

Message

When using Internet Explorer, printing an interview from the webpage always resulted in a blank page at the end.

Solution

The print functionality has been optimized, so that no extra page will now be printed.

Known issue

The solution does not work for Microsoft Edge 38.14393.1066.0.

17. Mutation details not shown correctly in review tab (Change 242105)

Message

Mutation details are not shown correctly in the review tab of the 'Totaalbeeld' section in review.

Solution

The changes made result in the presentation of the mutation details.

18. Search functionality not working as expected (Change 265373)

Message

The global search for MOC role was not displaying the right set of results.

Solution

The changes made result in the presentation of the correct set of results.

19. Extra questions are not shown for feedback requests (Change 329061)

Message

When requesting feedback for an employee, the extra questions are not shown while general questions are not selected while initiating a feedback request.

Solution

The changes made result in the presentation of the extra questions.

20. Issue in print functionality in employee mutation screen

Message

When trying to print the mutation results of an employee, an empty screen is shown.

Solution

The changes made result in the proper presentation of the screen.

Known issue

The solution does not work for Microsoft Edge 38.14393.1066.0.

21. Concept review email functionality not working correctly

Message

Even when the *Concept review to manager* setting is switched on for the customer and the employee clicks on the *Concept review* checkbox, an email is still sent to the employee instead of to the manager.

Solution

The changes made result in the proper process. The manager will now receive the email.

22. Access denied error shown when accessing an employee

Message

An *Access denied* message is displayed while accessing some employees even though the manager is authorized.

Solution

The changes made result in the proper handling of the authorization.

Release Notes Performance Management

Release 2017-06

Version 1.0

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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 in question (change) in our system.

Solved messages

1. Percentages of business unit cannot be changed (Change 453736)

Message

Changing or adding percentages under *Settings\ Business Units* was not possible when using a Performance Management environment with percentage-based weighting.

Solution

After installing this release, these percentages can be changed again.

Release Notes Performance Management

Release 2017-05

Version 1.0

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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 in question (change) in our system.

Changed and improved

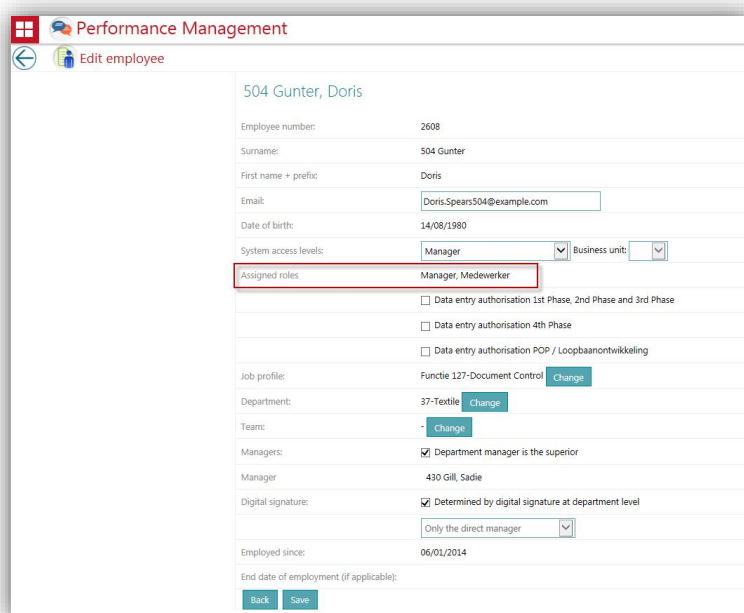
1. Employee roles shown in *Edit employee* screen

Why

For some time now, it has been possible for users to have more than one role in Performance Management. An example is the combination of the role of Manager and that of HR professional. Since the role dropdown menu on the *Edit employee* screen was only intended to assign roles to people, and therefore only showed someone's role last assigned and saved, administrators could not easily identify what roles had been assigned to users.

How

After this release has been installed, the *Edit employee* screen will show which roles a user has.



Performance Management	
Edit employee	
504 Gunter, Doris	
Employee number:	2608
Surname:	504 Gunter
First name + prefix:	Doris
Email:	Doris.Spears504@example.com
Date of birth:	14/08/1980
System access levels:	Manager Business unit:
Assigned roles:	Manager, Medewerker
	<input type="checkbox"/> Data entry authorisation 1st Phase, 2nd Phase and 3rd Phase
	<input type="checkbox"/> Data entry authorisation 4th Phase
	<input type="checkbox"/> Data entry authorisation POP / Loopbaanontwikkeling
Job profile:	Functie 127-Document Control Change
Department:	37-Textile Change
Team:	Change
Managers:	<input checked="" type="checkbox"/> Department manager is the superior
Manager:	430 Gill, Sadie
Digital signature:	<input checked="" type="checkbox"/> Determined by digital signature at department level
	Only the direct manager
Employed since:	06/01/2014
End date of employment (if applicable):	
	Back Save

Your action

No additional action is required. This release automatically makes this functionality available.

2. Activating the Personnel file link was impossible for long document names

Why

Having final review meeting reports (in PDF) automatically added to the Personnel File Online (PFOL) has been possible for some time. The name of the document consists of a combination of the review meeting name and the name of the term. The maximum length of document names in the Personnel File is 50 characters. If the name that originated from Performance Management was longer than 50 characters, the document would be rejected by PFOL.

How

After installing this release, it will no longer be possible to activate the link with PFOL (under Settings - Personnel File Online) if the combination of the review meeting name and the name of the term exceeds 50 characters. You will then first need to change the review meeting name or the name of the term. Please note: since the history will also be sent to the Personnel File Online when this link is activated, this also applies to review meeting names or names for terms from the past.

If you change one of the names after activating the link, and if the combination then becomes longer than 50 characters, Performance Management will abridge the name to 50 characters before sending the document to the Personnel File Online.

Your action

No additional action is needed. The Service Desk has already contacted customers who had activated the link and had a combination of more than 50 characters.

3. Ease of use with feedback question improved

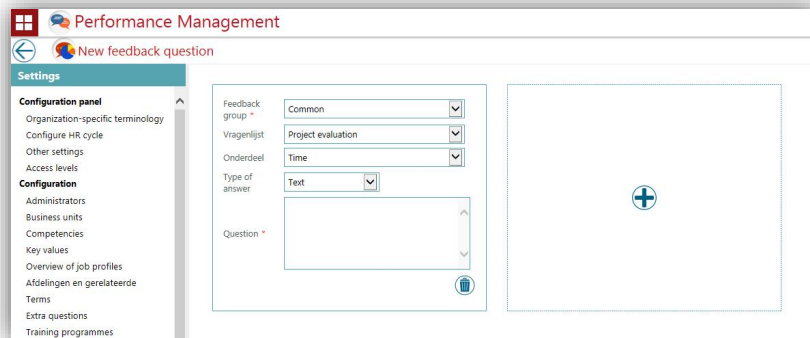
Why

The 2017-04 release enabled questionnaires to be added to a feedback request. Settings - Feedback Questions lets you add and change questions. This question would be opened in a new screen. However, it was found in practice that it would be easier to add several questions in a pop-up screen at once.

How

After installing this release, a pop-up will show when editing feedback questions, making this action easy to do.

If you add a question, a screen will open where you can add several questions in one action.



Your action

No additional action is needed; the functionality will be available immediately upon installing this release.

Messages resolved

4. Review meeting guide tile visible although no access (Change 423281)

Message

Users who had no access to all review meeting guides and frequently asked questions would still see the *Review meeting guides* tile. This led to confusion since clicking the tile did not show any content.

Solution

After this release has been installed, the Review meeting guides tile will not be visible if a user has not been authorised for any of the underlying functionalities.

5. Comma preceding employee name (Change 369043)

Message

If an employee was supplied from HRCore Beaufort without a compound name (i.e. only surname), Performance Management showed a comma to precede the employee's name.

Solution

After installing this release, no comma will be shown if there is no compound name. However, in order to correct the existing names, the employees in question will have to be supplied from HR Core BO4 again.

6. Spider's web not visible in English-language version

Message

If users used the English-language version of Performance Management, the Read Feedback screen did not always show the spider's web, even though there were feedback results.

Solution

After installing this release, the spider's web is now also always available in the English-language version of Performance Management.

7. Copied results visible together with the original results (Change 442747)

Message

Performance Management enables managers to copy results areas to other employees. Any changes to the title and description would be immediately implemented for all employees with the same results area. However, employees who are permitted to edit a results area were not always aware that the results area in question was copied and, as a result, the text would also change for other employees, although this was not intended.

Solution

After installing this release, any change by an employee to a copied results area will only be implemented for the employee in question.

8. Error when selecting the 'Draft of review meeting' checkbox (Change 441682)

Message

If you used the functionality to make a draft of a review meeting available from the employee to the manager or vice versa, an unexpected error would be shown when saving the review meeting.

Solution

After installing this release, the selection of the draft of review meeting checkbox will be saved correctly.

Management Information from Talent Management

9. Revised report model.

For some time now, it has been possible to create your own reports using data from the different Talent Management modules. You can read more about this in the 2016-07 release notes.

In practice, it was found that relationships between some data were missing, there were some incorrect relationships, and field names sometimes changed after adding them to a report. This has led us to revise the report model.

Your action

As a result of our revision of the report model, it is possible that some reports that you have created will no longer yield any results. This means that, after installing this release, you should review the reports you have already made. If a report is no longer effective, you can add the field in question again from the related entity.

Release Notes Performance Management

Release 2017-04

Version 1.0

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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 in question (change) in our system.

New

1. Add questionnaires to requests for feedback

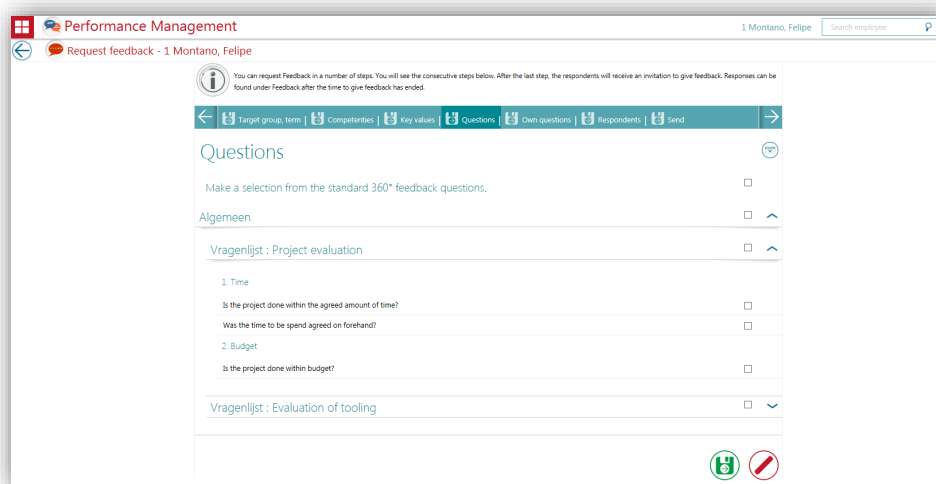
Why

If you use 360° feedback, you can easily ask colleagues, managers, external parties and/or customers, etc. for their opinions about an employee. You can ask for feedback on competencies and core values, but also on general subjects, or you can ask specific questions for the feedback request in question.

However, practical experience has shown that there is also a need for a greater set of questions in the form of a questionnaire. Users in the education market for example can use this as a tool for lesson observations, or it can be used for other purposes in other market segments, e.g. to evaluate a project.

How

This release introduces the possibility to add questionnaires that have been configured by the administrator (see *Your action*) to the feedback request.



You can find these questionnaires on the *Questions* tab in the feedback request. You can make the following selections there:

- select all questionnaires at once
- select one of the questionnaires, or

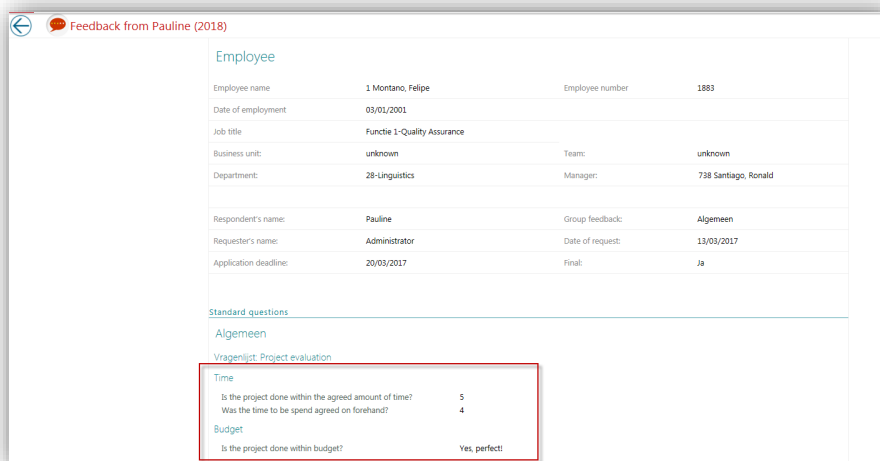
- only select a few questions from one or several questionnaires.

Of course, the preview of the feedback request on the *Send* tab has also been adjusted to match this new possibility.

The invited respondent(s) will receive the invitation to fill the feedback request by email as usual. After logging in, the questions are shown to the respondent, possibly preceded by the competencies and key values that the request concerns.



A new element on this page is the print button (right-hand top corner) that enables the user, if so preferred, to print the form and fill it in on paper first, for digital processing later.



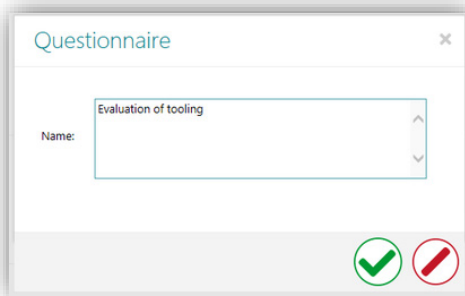
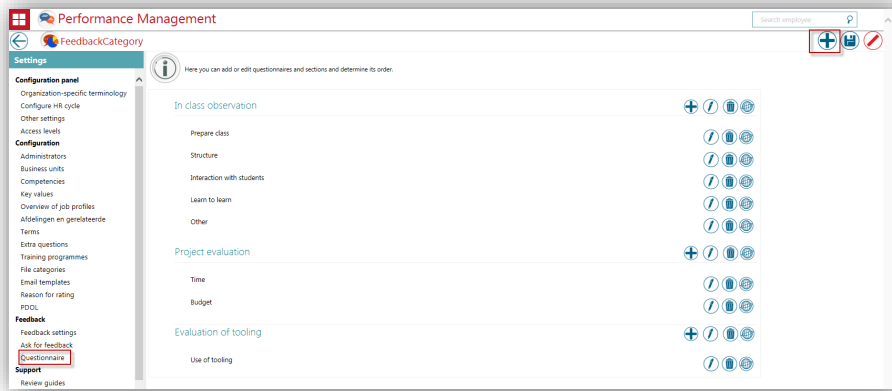
Employee			
Employee name	1 Montano, Felipe	Employee number	1883
Date of employment	03/01/2001		
Job title	Functie 1-Quality Assurance		
Business unit:	unknown	Team:	unknown
Department:	28-Linguistics	Manager:	738 Santiago, Ronald
Respondent's name:	Pauline	Group feedback:	Algemeen
Requester's name:	Administrator	Date of request:	13/03/2017
Application deadline:	20/03/2017	Final:	Ja
Standard questions			
Algemeen			
Vragenlijst: Project evaluation			
Time			
Is the project done within the agreed amount of time?	5		
Was the time to be spend agreed on beforehand?	4		
Budget			
Is the project done within budget?	Yes, perfect!		

Once the respondent has answered the questions, they can be seen through the feedback details page (by clicking the *Read feedback* page).

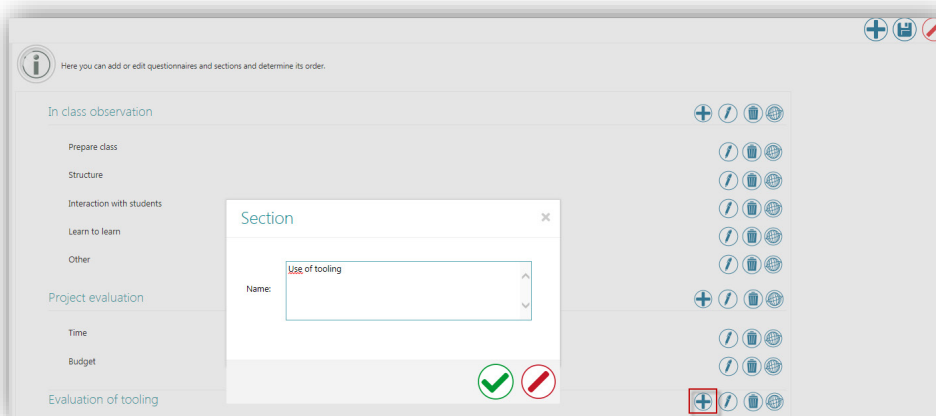
This preview is also based on the new configuration. The results can also be processed in own reports via Talent Management Reporting.

Your action

As an administrator, you can create and maintain questionnaires.



You can start creating a questionnaire by selecting *Settings | Feedback | Questionnaire* and clicking on the plus icon in the right-hand top corner of the page.



You can then use the plus sign next to the name of the questionnaire that has been added to add various sections to which the questions can be added.

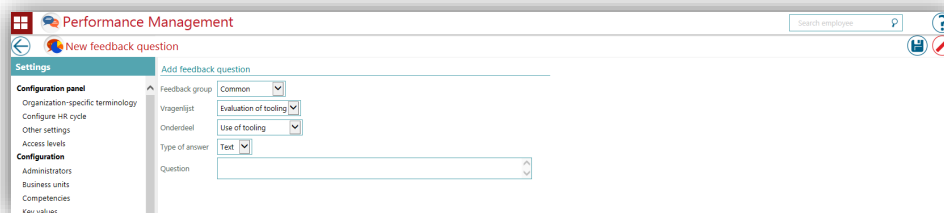
Please note: the name of this section should now be a unique name that does not occur in any other questionnaire. We will change this into 'a unique name for the individual questionnaires' in an upcoming release.

And finally, you can determine the sequence of the questionnaires and sections by dragging and moving the name. Then click the diskette icon in the right-hand top corner of the page to save this sequence.

You can add the questions to the sections in the questionnaires on the *Settings | Feedback | Ask for feedback* page.

This page will first show you all your existing target groups for feedback. To add a new question, you should click the plus icon in the right-hand top corner of the page.

You will then see the following screen:



- Select *Feedback group* and select the feedback target group that the questionnaire applies to.
- Go to *Questionnaire* and select the questionnaire that this question should be added to.
- Go to *Section* and select the section of the questionnaire that the new question should be added to. The selection menu will not show until you have selected the Questionnaire.
- Go to *Type of answer* and enter whether the answer should be a text or a score. If it should be a score, the same scale will be used as for the score for competencies/key values. If you select the *Do not allow 'score'* option, respondents cannot enter a score here.
- Go to *Question* and enter the question that you would like to ask the respondent.

Saving the question returns you to the list of questionnaires, sections and questions. Here you can change the order of the questions in the sections/questionnaires by dragging questions to another location. Then click the diskette icon in the right-hand top corner of the page to save this order.

Of course, you can still change the question, remove it, or implement a translation (provided that you have purchased MultiLingual) using the following icons that are shown next to the question.



If you had already created any questions prior to this release, they will continue to exist, but they will not have been assigned to a questionnaire.

Solved Messages

2. Employee name in feedback request (Change 362610)

Message

You can use the [employee] tag when creating standard feedback questions, but also when adding your own questions to individual feedback requests. If you use this tag, the employee's name will be filled in. First name, last name used to be used here, because this is the name as used in Performance Management. However, since this is difficult to read, we now only present the first name.

Example:

If feedback is asked about Piet Jansen and the question is: *How does [employee] perform?* this used to be shown as *How does Jansen, Piet perform?*

Solution

After installing this release, only the first name will be used. The question will then be presented as: *How does Piet perform?*

3. Explanatory text in feedback request incorrect (Change 364085)

Message

The explanatory text for the *Own questions* tab in the feedback request used the customer-specific text for Extra questions, although this should not be used. A word was missing as well.

Solution

After installing this release, this text has been changed to *You can add your own questions for your feedback request here.*

4. Core values tab skipped in feedback request (Change 376957)

Message

Requesting feedback consists of several steps. In some cases, when using *Save and continue*, the *Core values* step was skipped.

Solution

After installing this release, the *Core values* step will no longer be skipped.

5. Behavioural characteristics when printing an Blank review meeting form (Change 363352)

Message

When printing an blank review meeting form, you can also opt to print the *job-specific explanation* function. However, the behavioural characteristics that go with the competencies were not printed then.

Solution

After installing this release, the behavioural characteristics are printed as well.

6. Unexpected error when printing an Blank review meeting form (Change 373182)

Message

If one of the competencies of the employee did not have a description, the system would generate an error message when printing an blank review meeting form.

Solution

This release has remedied this *unexpected error*.

7. Core values shown doubly in the job profile (Change 364823)

Message

In some cases, the core values were shown doubly upon clicking the *Job profile* tile for the employee.

Solution

This release resolves this: the core values, including the description, are now shown correctly.

8. Spider chart not shown after entering feedback (Change 416644)

Message

In some cases, the *Read feedback* screen did not show the spider chart, although the feedback on the job-specific competencies had been filled.

Solution

After installing this release, the spider chart is now shown correctly.

9. Employee name not mentioned in email about draft meeting

Message

Once a draft meeting is ready, the employee can email their manager, or vice versa, via Performance Management. The same email template is used for this. If an employee sent an email to their manager, the employee's name was not mentioned and, as a result, it was not clear which employee was ready. In some cases, the Read feedback screen did not show the spider chart, although the feedback on the job-specific competencies had been filled in.

Solution

We have made some changes to the email template in this release.

There are three new merge fields:

- Manager's last name,
- Manager's first name,
- Manager's name.

The existing merge fields have also been changed:

- Employee's last name - Manager's last name,
- Employee's first name - Manager's first name,
- Employee's name - Manager's name.

Release Notes Performance Management

Release 2017-03-08

Version 1.0

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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.

Solved messages

1. Incorrect description of information texts for review meeting parts

Message

Customers who have several customer environments sometimes noted that the information texts of review meeting parts (as recorded in *Settings | Organization-specific terminology | Review meeting parts*) of one environment were shown for another environment under the same debtor number.

Solution

After installing this release, users will be shown the correct information text.

2. Error message when requesting feedback (change 395699)

Message

An *unexpected error* message was sometimes returned when requesting feedback.

Solution

This interim release resolves this problem and enables feedback to be requested without an error message being shown.

Release Notes Performance Management

Release 2017-03

Version 1

Content

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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.

Solved Messages

1. Unwarranted showing of action plans in review meeting report (Change 376771)

Message

The lower section of Settings - Configure HR cycle lets you indicate whether users should be able to add action plans to the review meeting. If no action plans were included in the review meeting, they would not be shown there, but they were shown in the printout of the review meeting report although they should not be shown there either.

Solution

This release makes sure that action plans are no longer shown in the printout of the review meeting report if they are not present in the review meeting itself.

2. Extra interview not saved (Change 403934)

Message

Performance Management enables you to use the *Extra review meeting* functionality to record interviews outside the regular HR cycle. If you added an extra interview for the employee, the title of the interview was saved immediately, but its contents were not. The text was not saved until the interview was listed again.

Solution

This release causes the contents of the extra interview to be saved immediately when adding the extra review.

3. Employees missing from calendar (Change 401385)

Message

Sometimes, a manager's calendar did not show all the employees with an HR cycle.

Solution

After installing this release, the manager's employees will be shown in his calendar, provided that there is or has been at least one meeting.

4. Smart Goals: unwarranted warning (known error 2017-02 release)

Message

We informed you about a known error in the 2017-02 release notes. When adding a new smart goal without the percentage of existing smart goals being 100%, the application sometimes returned a warning when saving the new smart goal. This gave the impression that the smart goal had not been saved. If you then clicked *Cancel* in the pop-up box and then refreshed the screen, you saw that the smart goal had been saved after all.

Solution

This release has resolved this problem and this message will no longer show when adding a smart goal, but only when saving this part in the review meeting.

Release Notes

Performance Management

Release 2017-02

Version 1.0

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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. Goal Management: weighting added

Why

Raet offers you a supplementary module to Performance Management: Goal Management. This new module gives you more grip of the progress towards targets or goals.

Examples are budgets. You can set these SMART goals at an organizational level, for specific target groups (departments, functions, type of employment) or at the employee level.

You can then visualise and monitor the progress towards these goals.

It was found to be desirable that a weighting value could also be added to these targets and goals. This would enable differentiation based on the difficulty or urgency of targets or goals, and it would enable this weighting to be considered when deciding about a bonus for employees etc.

How

After installing this release you will be able to assign a weighting percentage to SMART goals. This weighting is separate from the weighting that is part of the review cycle and enables users to keep a good overview as well as facilitating reporting.

Furthermore, since another assessment method is applicable to SMART goals, it would not be desirable to link the weighting to the weighting of the review cycle.

You can find the new field for assigning the weighting in the SMART goals tab in the review cycle or through the Individual goals tile on the employee page.

Since the weighting applies to the employee level, you can only add the weighting in these locations and not, for example, to the general goals at the organizational level.

Performance Management 1047 Milligan, Ashley

Status review meetings — 1st Phase — 1047 Milligan, Ashley

Targets

Increase revenue
Current : 50000

Increase revenue of our products to 100.000

Result	100000 (Target)	Start date	01-Jan-2018	End date	31-Dec-2018
Current	50000				

Source of verification: Individual
Created by: Administrator
Required: No
Weightage: 80,00 %

Increase customer satisfaction
Current : 7,5

Total weighting of review element: 100,00% / 100,00%

Add Goal

The weighting is based on percentages, rounded to two decimals. The total of the weighting should be exactly 100%, otherwise a message to this effect will be displayed when saving the page.

Your action

To enable users to add weighting to the SMART goals, go to **Settings - Other settings** and activate 'Enable weighing within smart goals'.

This option is off by default.

Performance Management

Other settings - Administrator

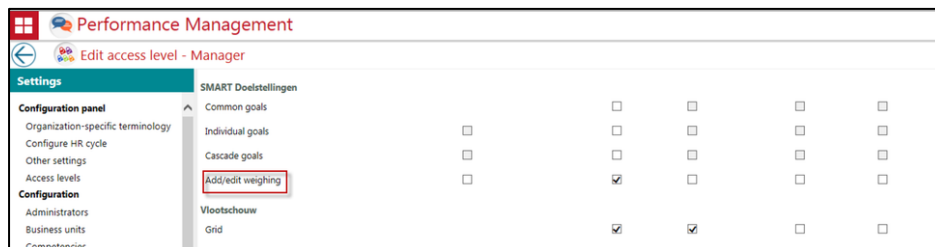
Settings

- Configuration panel
 - Organization-specific terminology
 - Configure HR cycle
 - Other settings**
 - Access levels
- Configuration
 - Administrators
 - Business units
 - Competencies
 - Kernwaarden - en
 - 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
- Import
 - Create
 - Import reports
 - Settings
 - Type of employment
- Export
 - Enable weighing within smart goals

Include at least one key value in the job profile
 Deviate from calculated final score (when weighting scores)
 Allow the role of employee allowed to enter data
 Rol Invoerm medewerker obv groepen toestaan
 Allow the role of deputy/2nd manager
 Email correspondence is active
 Use draft of review meeting for manager (the manager gives the employee access).
 Use draft of review meeting for employee (the employee gives the manager access).
 Use notification email in HR cycle (employee to manager or manager to employee)
 Reports only show the HR cycle data that has been set up
 Reminder email repeat frequency: 7 days
 Do not show total scores in 4th Phase.
 Show Directly to 4th Phase only after finalised 1st Phase interview.
 Action plan is required in the event of insufficient performance
 Show help
 Collectively assign digital signature: Choose digital signature ...
 Kleurmarkering toepassen bij gebruikte gespreksonderdelen
 Use colour marking for 'Last update by' others
 Show button 'compare score' in conversations
 Eindbeoordelingsgesprek tab in gesprek niet zichtbaar voor medewerker
 Adjusting result agreements during review cycle
 Hiding POP learning objectives
 Show empty reviewparts in PDF
 Enable weighing within smart goals

In addition, you will have to authorize the roles that are allowed to add or edit the weighting accordingly via **Settings - Access levels** - *select the role in question* - "Add/edit weighing" .

If the person in question has not been authorized for this, the weighting value will be read-only.



Note. Goal Management is available only if you have purchased this from Raet.

Known error

If you add and then save a new smart goal, the application will sometimes return a notification stating that the percentage of the existing smart goals is not 100%. It may then appear that the smart goal has not been saved. However, if you click on Cancel in the pop-up box and then refresh the window, you will see that the smart goal has been saved. We will remedy this problem in the next release, so that this notification will no longer be shown when adding a smart goal, but only when saving this element as part of the review meeting.

2. New summary: Progress Targets

Why

When assigning a weighting value to the SMART goals, it is important that you have a total view of the progress towards these goals or 'targets' and that you are able to do a bonus calculation if required.

This release introduces a standard report that you can use as the basis for this.

After exporting to Excel, for example, you can add your own data to this (such as salary data) and make any calculations required.

How

A new summary was added to the default summaries: Progress Targets.

If your organization uses organization-specific terminology for goals, this will, of course, be shown here.

This report shows the active targets and the employees linked to them (based on the parameters used). This concerns both currently employed employees and employees who are no longer employed.

If a target or goal is still active, it may be important that an employee who is no longer employed is also awarded a bonus.

The report features the following columns:

- Number
- Last Name
- First name
- Department
- Job
- Date of employment
- Date of leaving employment
- Term (your own text will be applied here)
- Target
- Type of goal
- Weighting
- Target/Budget
- Achieved / % Achieved

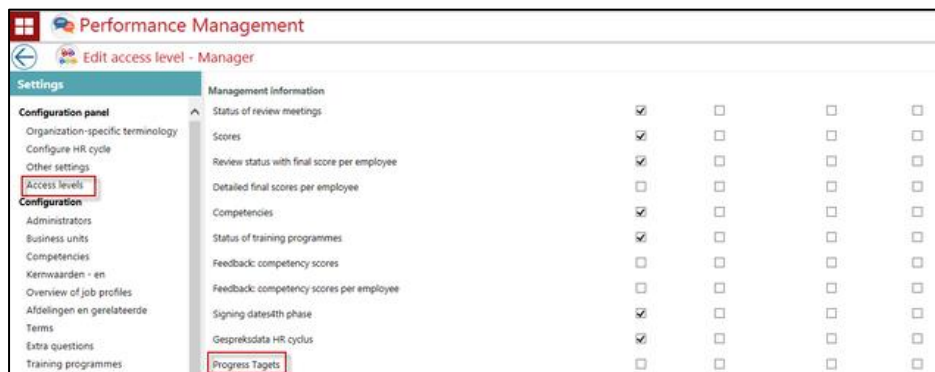
You can also select the following parameters:

- Department
- Job profile
- Term
- Type of goal

You can export the report into several formats, including Excel or PDF, as usual.

Your action

In order to grant a role access to this new report, go to **Settings - Access levels** - *select the role in question* and then select "Progress Targets" and assign the relevant scope.



Changed and improved

3. Advanced search: filter by employment status

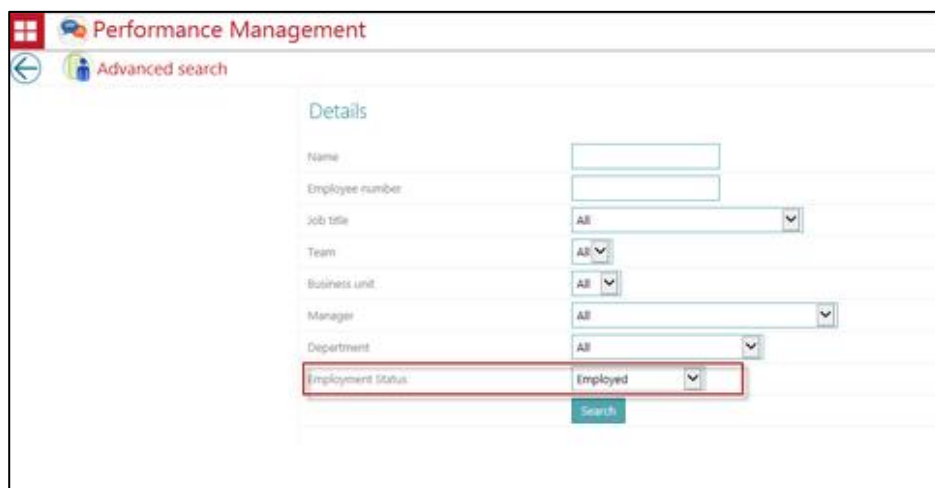
Why

In a recent release, we resolved a problem where employees who were no longer employed were no longer shown in the advanced search results, although they should have been shown.

Several customers have now indicated that they do not always wish to see employees who are no longer employed in the results.

How

This release adds a new filter to the Advanced search filters: Employment Status

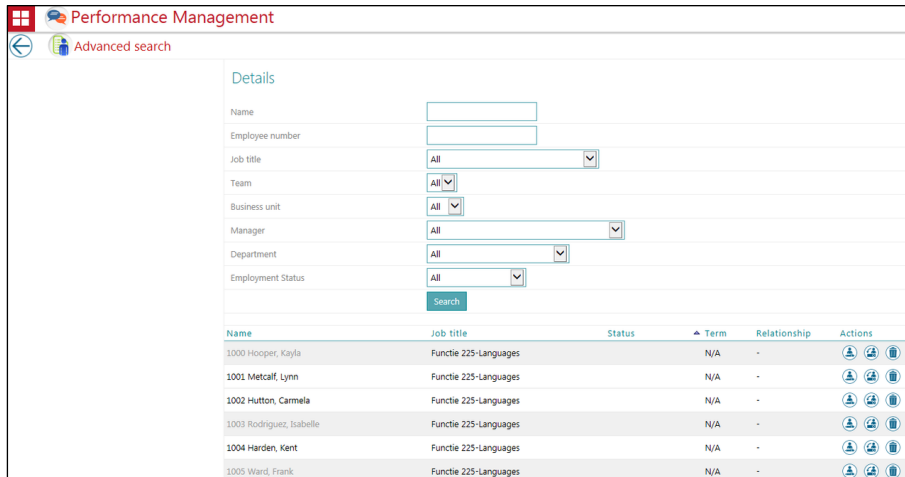


The screenshot shows the 'Performance Management' interface with the 'Advanced search' section. Under the 'Details' heading, there are several search filters: Name, Employee number, Job title, Team, Business unit, Manager, Department, and Employment Status. The 'Employment Status' filter is highlighted with a red box and is currently set to 'Employed'. A 'Search' button is located below the filters.



















When this screen is started, 'Employed' is selected in this filter by default. Of course, you can also choose 'All' or 'No longer employed'.

If you choose 'All', the employees who are no longer employed will be greyed out in the list of results. If you choose 'No longer employed', you will see the employees in the customary manner, since it is inherent in the filter selected that they are no longer employed.

Your action



The screenshot shows the 'Performance Management' 'Advanced search' interface. It features a 'Details' section with various filters: Name, Employee number, Job title (set to 'All'), Team (set to 'All'), Business unit (set to 'All'), Manager (set to 'All'), Department (set to 'All'), and Employment Status (set to 'All'). A 'Search' button is located below the filters. Below the filters is a table with the following data:

Name	Job title	Status	Term	Relationship	Actions
1000 Hoopes, Kayla	Funcie 225-Languages	N/A	-	-	  
1001 Metcalf, Lynn	Funcie 225-Languages	N/A	-	-	  
1002 Hutton, Carmela	Funcie 225-Languages	N/A	-	-	  
1003 Rodriguez, Isabelle	Funcie 225-Languages	N/A	-	-	  
1004 Harden, Kent	Funcie 225-Languages	N/A	-	-	  
1005 Ward, Frank	Funcie 225-Languages	N/A	-	-	  

No additional action is needed. The new filter is automatically available after the release.

4. Show employee number

Why

An employee's employee number is shown at various points in Performance Management. Examples are the review meeting report and other reports. Employees often have two different identifications, resulting from the various HR Core systems: their technical identification and the identification that is known to the user. Unfortunately, some screens showed the technical identification.

How

After installing this release, the same employee number will be shown everywhere: the identification known to the user.

Messages remedied

5. Translation of organization-specific terminology (change 275310)

Message

If you use the multilingual functionality of Performance Management, you can enter translations for your own texts in several places. Formerly, if you did this on the **Settings - Organization-specific terminology** page, two problems could occur:

1. If a change was made to Dutch organization-specific terminology that had been listed previously, the corresponding translations were no longer available.
2. The translation did not work if the Dutch text was more than 300 characters.

Solution

This release resolves this.

However, a consequence is that the existing translations will be lost. If this is applicable to your situation, your consultant will have contacted you to advise you on how you can make them available again in the application.

Note: if you do not use the multilingual functionality, you do not need to take any action. The Dutch organization-specific terminology will not be changed.

Release Notes Performance Management

Release 2017
Version 1

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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.

General

If you have recently switched to the *My Raet Bundle*, you will have some functionality that you might not have had before, e.g. the HCM tile in Performance Management. You can arrange the authorization for this option through the *Access levels*.

Raet can help you configure the HCM grid and make it available to end users. Please contact your application manager for this.

Solved messages

1. Incorrect column name in Review meeting status report (change 67945)

Incorrect column name when exporting the Review meeting status including final scores per employee report to CSV

Message

When exporting the *Review meeting status including final scores per employee* report to CSV, the *employee* column heading used to be replaced by *first name*.

Solution

From now on, the *employee* column heading is maintained when exporting to CSV.

2. Erroneously received email after re-opening review meeting (change 6003)

Message

If a change or amendment is needed after a review meeting has been signed by one or all of the parties involved, the review meeting can be reopened. If it has been laid down in **Settings > Other Settings** that the employee's and manager's permission is required for this, the people involved who have signed the review meeting will receive an email about this and they can then click the **Reopen** button for the meeting in question in the application.

An employee who had not signed the review meeting yet would erroneously receive an email that they should reopen it.

Solution

With effect from this release, employees will only get emails that tell them to reopen a review meeting if they have actually signed the original review meeting.

We have also remedied the problems associated with reopening if a department has several managers, see Release notes 2016-11, subject 3.

If a request to reopen is sent, all direct managers will receive an email and they will all be able to reopen the review meeting. As soon as one of these managers has reopened the review meeting, the other managers will no longer be able to do so and the reopening process will continue as standard.

Interim release of 15 December 2016

3. Solved messages

We issued an interim release with solutions for the following messages on 15 December 2016.

- In some events, employees cannot sign their review meetings if they have been assigned a new manager after their previous manager signed the review meeting (change 6679).
- A white screen (time out) with the *Export Employees* functionality (change 6486).
- Inactive employees should not be visible in the *Export Employees* summary (change 70687).
- Action plans are not exported to the next cycle if there is only one review meeting in the cycle. **Note:** this solution is based on the assumption that every customer has at least switched the review meeting on (change 6538).
- Filtering by completed review meetings does not work correctly in the *Review meeting status including final scores per employee* report (change 6868, 70840).
- Not being able to sort by the *relationship* column in the *Employee summary* (change 6869).
- The import settings show the *Automatic synchronization active* field in the import settings for HR Core Business and HR Core Beaufort, although this field is only relevant to HR Core Education customers (change 4733).
- The pop-ups now also match the new layout that was delivered as part of the December release.

The December release notes failed to state that a change was implemented to remedy the problem that any employees who had left the company's employment were not shown in the *advanced* search results. However, since we received some questions about this, we have decided to list this here after all. The wish to make employees who have left the company's employment more visible was added to the **Ideas** forum.

We will give feedback on the calls remedied by means of the interim release via our Service Centre.