## Release Notes Performance Management

Release 2018-11 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.

### New

### 1. Option to grant / revoke permission for reviews

### Why

An administrator wants to have control of when a manager/employee can access ongoing reviews.

### How

Customers can configure this setting:

- Login as administrator.
- Navigate to the *Settings* page and click *Other Settings* from the left-hand menu.
- The Enable grant/revoke permission for reviews setting will be available as shown below.

Review can be modified only after it has been signalled.
 Use notification email in HR cycle (employee to manager or manager to employee)

This new option works independently of Draft reviews.

The existing setting that employees have to access reviews (Employee edit screen) is still valid in this case. Employees who do not have access to the employee edit screen still have no access to reviews, even if the above permission is granted.

The setting will be disabled by default.

When the setting is enabled, either manager or employee can start the review.

| HR Cyclo 2018 Now   |   |   |                        |            |  |  |  |  |  |
|---|---|---|------------------------|------------|--|--|--|--|--|
| TK CYCIE ZUTB INEW<br>Stage Term Start date Actions   |   |   |                        |            |  |  |  |  |  |
| Planning Phase English unfinished 2018<br>New   | 2018 New  | 09 October 2018                                 | Continue 🐽             |            |  |  |  |  |  |
|   |   |   |                        |            |  |  |  |  |  |
| This will show you the recorded r<br>Click on an HR Cycle to access the<br>Your current meeting report will b<br>HR cycle: my current review<br>Planning Phase English unfinished 2018 New  | eports of the review n<br>e reports.<br>se shown for you to re<br>r meeting | neetings for every review rour<br>aad and sign. | nd (HR Cycle).         |            |  |  |  |  |  |
| This will show you the recorded r<br>Click on an HR Cycle to access the<br>Your current meeting report will b<br>HR cycle: my current review<br>Planning Phase English unfinished 2018 New<br>Review meetings                                 | eports of the review n<br>e reports.<br>se shown for you to re<br>y meeting | neetings for every review rour<br>ead and sign. | nd (HR Cycle).         |            |  |  |  |  |  |
| This will show you the recorded r<br>click on an HR Cycle to access the<br>Your current meeting report will t<br>HR cycle: my current review<br>lanning Phase English unfinished 2018 New<br>Review meetings<br>IR Cycle 2018 New             | eports of the review n<br>e reports.<br>se shown for you to re<br>n meeting | neetings for every review rour<br>and and sign. | nd (HR Cycle).         |            |  |  |  |  |  |
| This will show you the recorded r<br>Click on an HR Cycle to access the<br>Your current meeting report will the<br>HR cycle: my current review<br>Planning Phase English unfinished 2018 New<br>Review meetings<br>HR cycle 2018 New<br>Stage | eports of the review n<br>e reports.<br>e shown for you to re<br>n meeting  | neetings for every review rour                  | nd (HR Cycle).<br>Term | Start date |  |  |  |  |  |

When the manager starts editing the phase for a review the **Continue** button is not visible to the employee, and the **HTML** view will not be clickable.

If the employee starts editing the phase, the **Continue** button is not visible to the manager and the HTML view will not be clickable.

| Term123            | Finalization   |
|--------------------|--|
| Employee data      |  |
| Phase              | Date of review meeting   |
| Action Plan        | Planning Phase English 09-10-2018                                |
| Goals (afdeling)   |  |
| Preliminary review | Back Save and close Finalise Print Change log Signal to employee |

After the Manager signals the employee, he or she can access the review.

When the employees is finished with editing he or she has to send a signal to the manager to enable further processing.

## Solved Messages

## 2. Competences added in RPM but not visible in the report (change 885182, change 8138098)

#### Message

Competences added without description in the first review were not appearing in HTML view and downloadable pdf.

#### Solution



Now in both cases, Competencies is visible in HTML view and downloadable pdf.

### 3. Label for Goal Management checkbox has to be "Closed for Goal management" (change 885187)

#### Message

The label of a closed term on the Edit term page was displaying Open for Goal management

### Solution

| 🔢 Edit term |                                  |            |  |
|-------------|----------------------------------|------------|--|
|             | Edit term                        |            |  |
|             | Name                             | 2021 Last  |  |
|             | Start date                       | 01-04-2021 |  |
|             | End date                         | 30-06-2021 |  |
|             | Open term                        |            |  |
|             | Closed for Goal man<br>Back Save | nagement 🗹 |  |

The label has now been changed to *Closed for Goal management*.

## 4. Average feedback in the cycle is not correct (Change 1027291)

### Message

In the review cycle, the average feedback score was displaying incorrectly if one of the respondents gave no score.

#### Solution

|                | ×   |
|----------------|---|
| Self-score :   |   |
|                |   |
| Feedback Score |   |
| Excellent 3    |   |
| Excellent 3    |   |
| No score       |   |
| Excellent 3    |   |
|                | Self-score :<br>Feedback Score<br>Excellent 3<br>Excellent 3<br>No score<br>Excellent 3 |

Now the average score is calculated based on the number of scores received.

## 5. Action plan from 2nd review does not appear in 4th review if the 3rd review is missing (Change 964208)

### Message

If the optional 3rd review is skipped the Action plan from the 2nd review does not appear in the final (4th) review.

### Solution

| -             |  |                                |        |          | June rong, m |             |  |
|---------------|--|--------------------------------|--------|----------|--------------|-------------|--|
| Status review | r meetings — Blue collar — Final Pr    | hase 4 english — 1042 Ring, Ma | rshall |          |              |             |  |
|               | Term123<br>Employee data               | Action Plan                    | Target | Score    | Notes        | Action plan |  |
|               | Action Plan                            | Result areas:                  |        | No score |              | test AP2    |  |
|               | Goals (afdeling)<br>Preliminary review | Result areas:<br>klj:kl;       |        | No score |              | test AP2    |  |
|               | Extra gesprek                          |                                |        |          |              |             |  |
|               | Result areas<br>Targets                |                                |        |          |              |             |  |
|               | Competencies                           |                                |        |          |              |             |  |
|               | Vakinhoud                              |                                |        |          |              |             |  |
|               | Core values                            |                                |        |          |              |             |  |
|               | Special project                        |                                |        |          |              |             |  |
|               | DODTestEn                              |                                |        |          |              |             |  |

Now the Action plan from the 2nd review appears in the final (4th) review.

## **Changed and Improved**

### 6. Score is not mandatory for disabled tabs in the Review cycle

### Message

When the setting *Enable scores as mandatory in assessment cycle* is on and we are in Review cycle, we do not see core values. While finalizing the 1st review, we received an error message to select scores for core values.

### Solution

| 🔁 Performance Management   | 🚺 1029 Mcgrath, G   |
|--|---|
| 📚 Status review meeting <u>s — General/Def</u>   | ault — 1st Phase english — 1029 Mcgrath, Gilbert  |
| Select a score for all t   | te elements in Result areas, Competencies, Vakinhoud  |
| Term123<br>Employee data<br>Action Plan<br>Goals (afdeling)<br>Preliminary revie<br>Result areas<br>Targets<br>Competencies<br>Vakinhoud<br>Special project<br>POPTestEn<br>Overall view<br>Extra question<br>Finalization | Finalization         Date of review meeting         Planning Phase English: 24/10/2018         Ist Phase english: 24-10-2018         Back       Save and close         Print       Change log |

Now the error message is displayed based on the availability of five tabs (*Competencies, Core values, Special project, Result areas*, and *Job knowledge*).

## Release Notes Performance Management

Release 2018-10 Version 1.0

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- 1. Option to have mandatory scores in reviews
- 2. Option to limit more than one assessment per term for employees

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.

### 1. Option to have mandatory scores in reviews

### Why

This configuration provides the flexibility to make scores mandatory in reviews.

#### How

Customers can configure different scales as follows:

- Login as administrator
- Navigate to the Settings page and click Other Settings from the left-hand menu
- The *Enable scores as mandatory in assessment cycle* setting will be available as shown below:

Enable scores as mandatory in assessment cycle

By default the setting will be disabled. If the setting is then enabled, finalizing reviews without score will show the following error messages.

| Select a score for all the elements in Result an  | eas, Competencies, Core values, Vakinhoud  |
|---|--|
| Term123<br>Employee data<br>Action Plan<br>Goals (afdeling)<br>Preliminary review<br>Result areas<br>Targets<br>Competencies<br>Vakinhoud<br>Core values<br>Special project<br>POPTestEn<br>Overall view<br>Extra question<br><b>Finalization</b> | Finalization<br>Date of review meeting<br>Planning Phase English: 12/09/2018<br>1st Phase english 12-09-2018<br>Back Save and close Finalize Print Change log Signal to employee |

## 2. Option to limit more than one assessment per term for employees

### Why

This configuration provides an option to limit more than one assessment per term for employees.

#### How

Customers can configure different scales as follows:

- Login as administrator
- Navigate to the Settings page and click Other Settings from the left-hand menu
- The *Limit the creation of more than one assessment per term for employees* setting will be available as shown below:

Limit the creation of more than one assessment per term for employees
By default the setting will be disabled. If the setting is then enabled, only one assessment is allowed per term for employees. Selecting a term which is used by another review cycle will show the following error messages.

| The selected term is used by rev | view cycle which is inprogress/completed. |  |
|----------------------------------|---|--|
| Term123                          |   |  |
| Choose a Beoordelingstermijn:    | 2018 New (1/8/2018 to 2/8/2018)           |  |
|                                  |   |  |
|                                  |   |  |
|                                  |   |  |

## Release Notes Performance Management

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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 information**

### 1. Configure different scales for multi cycles

This release enables the configuration of different scales in Performance Management for multi cycle reviews. Employees can now be reviewed using different rating scales.

## Modified and Improved

### 2. Configure different scales for multi cycle reviews

### Why

This configuration provides the flexibility to configure different scales for multi cycle reviews. Previously, all multi cycle reviews had to use the same scale.

### How

Customers can configure different scales as follows:

- Login as administrator
- Navigate to the Settings page and click Multi cycle Review from the left-hand menu
  - Remark: if this option is not available, you are not authorized for it. For more info about his topic see the release notes of January 2018
- Click on Add or Edit review category.
- Configure scales as shown below (highlighted) and save.

| reprormance Mai                                 | nagement            |  |                                     |                   |                               |                  | Solution and and and and and and and and and an | Administrator |  |
|---|---------------------|--|-------------------------------------|-------------------|-------------------------------|------------------|---|---------------|--|
| Multi cycle review                              |                     |  |                                     |                   |                               |                  |   |               |  |
| tings   | This continue       | tion name is used to assign functions, departs | entrand employees to naticular rate | ory Which will be | set to link to review ourles. |                  |   |               |  |
| figuration panel                                | <b>.</b>            |  |                                     |                   |                               |                  |   |               |  |
| gandation-specific terminology<br>ther settings | dit Multi cycle r   | eview  |                                     |                   |                               |                  |   |               |  |
| ach Employees N                                 | ame "               | dsd  |                                     | 9                 |                               |                  |   |               |  |
|   |                     |  |                                     |                   |                               |                  |   |               |  |
| A D   | escription          |  |                                     |                   |                               |                  |   |               |  |
| ort Competencies                                |                     |  |                                     | _                 |                               |                  |   |               |  |
| P   | ogress review       | OldScaleVoor                                   |                                     |                   |                               |                  |   |               |  |
| ti cycle review St                              | ores "              |  |                                     |                   |                               |                  |   |               |  |
| figure HR cycle Fi                              | nal review Scores * | OldScaleEind                                   | *                                   |                   |                               |                  |   |               |  |
| figuration                                      | nd score Scores "   | OldScaleES                                     |                                     |                   |                               |                  |   |               |  |
| ployee data                                     | 1.01                |  |                                     |                   |                               |                  |   |               |  |
| ninistratory 70                                 | b bile              | Select job profile                             |                                     | (H)               | Employee name                 | Select employees | -)(   | Ð             |  |
| npetencies D                                    | epartment           | Select Department                              | -                                   |                   |                               |                  |   |               |  |
| e values  |                     |  |                                     | -                 |                               |                  |   |               |  |
| erview of job profiles                          | Functions           |  | Search                              |                   | Employees                     |                  | Search  |               |  |
| a question                                      | ob title            |  |                                     | Action            | Employee name                 | Job title        | Department                                      | Action        |  |
| nings,  | vo items            |  |                                     |                   | No items                      |                  |   |               |  |
| categories                                      |                     |  |                                     |                   |                               |                  |   |               |  |
| son for rating                                  |                     |  |                                     |                   |                               |                  |   |               |  |
| us calculation                                  |                     |  |                                     |                   |                               |                  |   |               |  |
| les   |                     |  |                                     |                   |                               |                  |   |               |  |
|   |                     |  |                                     |                   |                               |                  |   |               |  |

Newly configured scales will be applicable to new reviews. Click on Save and you will see a popup as shown below

| information   | ×   |
|---|-----|
| Changing scale will impact existing associations with all revie<br>Do you want to continue? | WS. |
|   |     |
| $\bigcirc$  |     |

Click on Yes to save the changes. Click on No to stay on the same page.

### 3. Additional merge fields to email templates

### Why

Some email templates are missing essential merge fields.

### How

Below you will find the email templates that has been changed .

| Luguno, essence abración er recurren  |    | - | naaca emproyeename                          |
|---------------------------------------|----|---|---|
| FeedbackRevoke                        | PM | 1 | Added employee's name                       |
| Performance Management: Signaal email | PM | 1 | added the receiver's name and sender's name |
|                                       |    |   |   |

## Solved Changes

## 4. Unexpected error when trying to change the repeat of the emails (change #914054)

### Message

A customer gets an unexpected error when trying to change the amount of email repeats to 30 days.

#### Solution

The maximum limit was 15 days. The maximum limit is now set at 30 days.

- Login as administrator
- Navigate to the Settings page and click "other settings" from the left-hand menu
- The Repeat frequency reminder email setting will be available as shown below:

| Repeat frequency reminder mail | 15 days |
|--------------------------------|---------|
| •                              |         |

• Change the value above 15 and try to save. It should not give unexpected error and if the value is greater than 30, it should give a validation message.

## Release Notes Performance Management

Release 2018-07 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.

## **General information**

### **Integration of Feedback and Performance Reviews**

This release enables Performance Management to work with the Integrated version of two most explored modules: Feedback and Reviews. This provides personal feedback information within the employees performance cycle.

### New

## New setting to enable/disable integration functionality between Feedback and Performance

### Why

This setting provides flexibility to all Performance Management customers for enabling or disabling the integrated functionality. This helps managers, other upper management staff and employees during their performance review by making sure all information on employee feedback is available during the employee's performance review cycle.

### How

Customers can either opt for the functionality by clicking the appropriate checkbox in the settings, or they can continue to use the application with the existing functionality. By default this setting will be disabled for all customers. It can be enabled by the organization's administrator.

Enable the integrated functionality as follows:

- Login as administrator
- Navigate to the Settings page and click other setting from the left-hand menu
- Click the below setting as shown below (highlighted) and save for integrated functionality

| 🕘 🛛 🗙 Other settings - A          | dministrator   |           |      |
|-----------------------------------|--|-----------|------|
| Settings                          | ✓ Use notification email in HR cycle (employee to manager or manager to employee)            |           |      |
| Configuration manal               | ✓ Reports only show the HR cycle data that has been set up                                   |           |      |
| Organization-specific terminology | Reminder email repeat frequency  | 1         | days |
| Other settings                    | Do not show total scores in Final Phase 4 english.   |           |      |
| Access levels                     | Chan Directly to Final Phase 4 anglish only after finalized Dianning Phase English interview | -         |      |
| Search Employees                  | Snow Directly to Final Phase 4 english only after finalised Planning Phase English Interview | •         |      |
| TMA                               | Action plan is required in the event of insufficient performance                             |           |      |
| TMA                               | Show help  |           |      |
| Export Competencies               | Default weighting when adding review meeting part in the HR cycle 3                          |           |      |
| Standaard TMA competenties laden  |  |           |      |
| Meerdere besprekingen             |  |           |      |
| Configure HR cycle                | Use colour marking for 'Last update by' others   |           |      |
| Terms                             | Show 'compare ratings' button in reviews   |           |      |
| Configuration                     | End scores tab not visible in review for employee  |           |      |
| Employee data                     | Adjusting result agreements during review cycle  |           |      |
| Administrators                    | Toon status gesprekken wident aan bebeerder  |           |      |
| Business units                    |  |           |      |
| Competencies                      | Hide PDP learning objectives   |           |      |
| Overview of job profiles          | Show empty review parts as PDF   |           |      |
| Departments (and related)         | Enable weighing within smart goals   |           |      |
| Extra question                    | ✓ Integration with recruitment module  |           |      |
| Trainings                         |  |           |      |
| File categories                   | Show multi cycle review  |           |      |
| Email templates                   | Toon HCM_Test_test1_english scores   |           |      |
| Reason for rating                 | Expiry reminder for certificates   | ○ No      |      |
| PDOL                              | Expiry Reminder Frequency  | 1 days    |      |
| Werving                           | The number of days before which the certificate expiration reminder should be sent           | 10 days   |      |
| Feedback                          |  | 10 4355   |      |
| Feedback settings                 | Linable Autosave functionality   |           |      |
| Ask for feedback                  | Set the language used for TMA analysis throughout the organization                           | English 💙 |      |
| Questionnaire                     | Enable automatic deletion of employees who are out of service for more than 10 years         |           |      |

• After enabling the checkbox, navigate to Access Level page and click on any role for which the administrator wants to enable this functionality by enabling the checkbox shown below (highlighted) and save:

| 🗧 🧱 Edit access level -          | Manager   |     |              |   |   |      |
|----------------------------------|---|-----|--------------|---|---|------|
| Settings                         | Kopie gesprek gegevens                          |     | M            |   |   |      |
| Confirmation and                 | Employee summary                                |     | N            |   |   |      |
| Organization panel               | Archive employees                               |     |              |   |   |      |
| Other settings                   |   |     |              |   |   |      |
| Access levels                    | Delete employees                                |     | ×            |   |   |      |
| Search Employees                 | Activate employees                              |     | $\mathbf{N}$ |   |   |      |
| TMA                              | Maintain employee data                          |     |              |   |   |      |
| тма                              | terterte anti-attaction                         |     |              |   |   |      |
| Export Competencies              | Maintain system authorities                     |     | 8            |   |   |      |
| Standaard TMA competenties laden | Notes   |     | 8            |   |   |      |
| Review                           | TMA   |     |              |   |   |      |
| Meerdere besprekingen            | View coaching advice                            |     | 2            |   |   |      |
| Configure HR cycle               | View competence learnshilts                     |     |              |   |   |      |
| Terms                            | view competence reamaging                       |     | <b>X</b>     |   |   |      |
| Configuration                    | View development activities                     |     | 8            |   |   |      |
| Employee data                    | Feedback  |     |              |   |   |      |
| Administrators                   | Request feedback                                |     |              |   |   |      |
| Business units                   | View feartback per reconstant                   |     |              |   |   |      |
| Competencies                     | view records per respondent                     |     | æ.           |   |   |      |
| Core values                      | View aggregated feedback                        |     | 8            |   |   |      |
| Overview of job profiles         | Request self-score                              | ×   | 2            |   |   |      |
| Extra question                   | Give self-score                                 |     |              |   |   |      |
| Trainings                        | Give sell-source                                |     |              |   |   |      |
| File categories                  | Access to show feedback related data in reviews |     |              |   |   | 2    |
| Email templates                  | Changel orging                                  | 5 A |              |   |   |      |
| Reason for rating                | View charges to UR out a                        |     |              |   |   |      |
| Bonus calculation                | view changes to rik cycle                       |     |              |   |   | LU . |
| PDOL                             | View change log                                 |     |              |   |   |      |
| Werving                          | Carlournet                                      |     |              |   |   |      |
| Feedback                         | Goal management                                 |     | -            | - | - |      |
| Feedback settings                | Common goals                                    |     | M            |   |   |      |
| Ask for feedback                 | Individual goals                                |     | $\mathbf{N}$ |   |   |      |
| Questionnaire                    | Cascade onals                                   |     | 2            |   |   |      |

## Performance cycle page - Displaying feedback scores under every Competency and Core Value

### Why

Pre-condition : Setting for Integration functionality explained above should be enabled.

A manager wants to have access to all feedback-related scores during employee reviews so there is no need to navigate back and forth to employee feedback detail page.

### How

Feedback scores given by every individual should be available for each Competency & Core-value under the *more options* button.

| lerm               | Competencies                                  |   |
|--------------------|---|---|
| Employee data      | 1 Coding Skills                               |   |
| Action Plan        | 2 Agility                                     | 8 |
| Goals              | 3 Commercial Power                            |   |
| Preliminary review |   | _ |
| Result areas       | Add component:<br>Select   Niveau 1 - English |   |
| Targets            |   |   |
|                    |   |   |

| (Imp) ~                |                  |
|------------------------|------------------|
| Show feedback scores   |                  |
| <br>Copy previous term | $(\mathfrak{B})$ |
| View changes           |                  |
| Delete                 |                  |
|                        | _&_              |
|                        | Ť                |

| Coding Skills              |                | ×              |
|----------------------------|----------------|----------------|
| HR Cycle rating : No score | Self-score :   |                |
| Feedback Scores            |                |                |
| Respondent's name          |                | Feedback Score |
| Respondent 1               |                | B Average      |
| Respondent 2               |                | A Good         |
| Average Feedback Score:    |                | B Average      |
|                            | L <sub>2</sub> |                |
|                            |                |                |

## Performance cycle page- Redirection to feedback detail summary page in new tab

### Why

Pre-condition : Setting for Integration functionality explained above should be enabled.

During an employee performance cycle, a manager wants to redirect and have an in-depth look at the employee's feedback summary. A new Icon must be implemented for this purpose.

#### How

Feedback scores given by every individual are available for each Competency & Core-value under the 'more options' button.

| Performance wanagement Status review meetings — Blue collar | r — Final Phase 4 english — 1042 Lacey, Dale              | TURIZ LACEY, DARE Sound anatolysis (P)  |
|---|---|---|
| Term<br>Employee data<br>Action Plan<br>Goals               | Competencies 1 Coding Skills 2 Agility 3 Commercial Power | ()<br>()<br>()<br>()<br>()<br>()<br>()<br>()<br>()<br>()<br>()<br>()<br>()<br>( |
| Preliminary rev<br>Result areas<br>Targets                  | eor<br>Add component<br>Select.                           | 8   |
| Competencies  |   |   |

### Feedback Detail Page - Implementing Standard and Extra questions/answers on feedback summary page at term level and at individual feedback level

### Why

A manager wants to see the summary of feedback questions and answers for each selected term. Answers should be grouped for each question.

### How

Answers available from feedback respondents are now part of Feedback term level summary in grouped fashion for every question asked. These sections have been added towards the end of the feedback summary details page.

| Add Feedback               | Ð                                     |
|----------------------------|---------------------------------------|
| Feedback term 2021 First • |                                       |
| Application date 31-5-2018 | • • • • • • • • • • • • • • • • • • • |
| Application date 31-5-2018 | 🔹 🔊 🛞 🗇 🛩                             |
| Application date 31-5-2018 | 🌒 🕲 🛞 🗸 🗸                             |
| Application date 28-5-2018 | 🌒 🕑 🗊 🗸                               |

| Zuesdons                            |   |
|-------------------------------------|---|
| Developer                           | ~ |
| Self-score                          | ^ |
| Adding New Question for terring 107 | ~ |
| Adding New Question for testing 177 | ~ |
| Adding New Question for testing 157 | ~ |
| Questionnaire: SC3                  | ~ |
| How was this topic 77?              | ~ |
| Questionnaire: English, Cat1        | ~ |
| +                                   |   |
| Extra questions                     |   |
| case                                | ~ |
|                                     |   |

## **Modified and Improved**

### GDPR changes to deletion of employees

### Why

In a scenario where an employee has multiple employments, the employee only can be deleted once all employments are out of service.

### How

A employee whose has any current employment cannot be deleted.

## Solved Messages

### Text overlaps in Request feedback(change #823863)

### Message

In the Questions tab for requesting feedback, text was overlapping other information.

### Solution

Text will not overlap other information on this page.

## Release Notes Performance Management

Release 2018-06 Version 1.0

## Content

| Gen        | eral  | 3      |
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| 1.<br>2.   | Performance Management release highlights<br>Set language for TMA at company level  | 3<br>3 |
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| 3.         | Advance search screen retain filters  | 4      |
| Solv       | ved Changes   | 4      |
| 4.<br>5.   | Error message after clicking employee edit button (change #818275)<br>An incorrect name is displayed for "the log" work agreements (change #811929) | 4<br>4 |
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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.

## General

# 1. Performance Management release highlights

The changes and enhancements done to Reports and Professional Competency are the highlights of this release in Performance Management. You will soon receive more information on this topic.

### 2. Set language for TMA at company level

### Why

As an administrator I want to have a setting where I can send all TMA invitations using the same language that is set at company level.

### How

1) A new setting has been added which has drop down values of different languages.

2) Whenever an invitation is sent, the language will be selected based on this setting (both from UI and Launcher).

3) This is set to Dutch by default.



## Modified and Improved

### 3. Advance search screen retain filters

### Why

When a user select a department in the advanced search screen and search for the employees working there, the search results (and filters) are lost as soon as I start editing.

### How

Once the filter is selected and if employee data is changed, then filters and the search results will be retained.

## Solved Changes

# 4. Error message after clicking employee edit button (change #818275)

### Message

An employee ID does not exist in the employee table for one of our employees. Please update code to check for null entries.

### Solution

Datafix has been given for the customer and associated ID has been updated to null.

## 5. An incorrect name is displayed for "the log" work agreements (change #811929)

### Message

The Logic for getting the correct sync id is wrong when a logged-in person has both admin and employee roles.

### Solution

Logic has been updated for getting the Sync-ID.

## Legislation

### 6. GDPR - Employees out of service shouldn't be deleted after 10 years (Only for Customers in Latin America)

### Message

Employee data for customers in Latin America should not be automatically deleted after 10 years.

### Solution

Until and unless deleted manually from the UI page, employee data will be retained beyond the 10-year out-of-service window.

### Action

No action needed.

## Release Notes Performance Management

Release 2018-05 Version 2.0

## Contents

| Gen | eral   | 3 |
|-----|--|---|
| 1.  | Performance Management release highlights          | 3 |
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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.

## General

## 1. Performance Management release highlights

The highlights of this release in Performance Management are the changes and enhancements done to implement the GDPR Legislation.

You will soon receive more information on this topic.

## Changed and Improved

# 2. Changes to employee import for standalone customer

### Message

It is currently not possible to update the manager of an employee in the import manager.

### Solution

A new option has been added in the employee import file to enable update of the employee's manager using the import file only.

- A new XML tag in the import file has been added.
- It will override managers for those employees whose department manager is a direct manager (indicated with value 'N').
- The existing csv import will still be there as well.

An example of the XML data is shown below:

<directRoleAssignments>

### <directRoleAssignment>

<supervisorRole>

<roleID>MGR</roleID>

<roleName>Manager</roleName>

<startDate>2018-01-01</startDate>

</supervisorRole>

<supervisor>

<personTk>1045</personTk>

<personID>1045</personID>

<lastName>Mitt</lastName>

</supervisor>

<employment>

<personTk>1900</personTk>

<personID>1900</personID>

<lastName>Ramirez</lastName>

<employmentID>9</employmentID>

<employmentTk>9</employmentTk>

</employment>

</directRoleAssignment>

</directRoleAssignments>

### Your action

No action needed.

## Release Notes Performance Management

Release 2018-04 Version 1.0

## Contents

| Contents  | 2 |
|---|---|
| Solved Messages   | 3 |
| Management Information ad-hoc-reporting (Change #6683146) | 3 |

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

### Management Information ad-hoc-reporting (Change #6683146)

#### Message

In the Raet Management Information POP-report (report for personal training plan) the employee information was not shown.

### Solution

The issue is solved; the report is working fine again.

## Release Notes Performance Management

Release 2018-03 Version 1.0

## Contents

| Cor            | itents  | 2           |
|----------------|---|-------------|
| Ger            | neral   | 3           |
| 1.             | Performance Management release Highlights   | 3           |
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| 2.<br>3.<br>4. | GDPR Implementation in Performance Management - BSN<br>GDPR Implementation in Performance Management- Employee deletion<br>GDPR Auto deletion of out of service employees | 3<br>3<br>5 |
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| Solv           | ved Messages  | 7           |
| 6.<br>7.       | lssue when selecting self score (change # 419179)<br>Search employee with partial personal number (change # 430114)   | 7<br>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 in question (change .....) in our system.

## General

### 1. Performance Management release Highlights

The focus of this release is to implement some aspects of the EU General Data Protection Regulation (GDPR) in Performance Management.

### New

## 2. GDPR Implementation in Performance Management - BSN

### Message

Talent Management will not be importing or saving an employee's BSN number.

### Solution

As part of importing employee information, the 'BSN' was also imported, but it was not shown anywhere. The process to import information has been updated and now the BSN is not imported anymore.

### 3. GDPR Implementation in Performance Management- Employee deletion

### Message

You can now permanently delete employees from Talent Management.

### Solution

Employees which are no longer part of your organisation can be permanently deleted. Follow the next steps:

Performance Management | Settings Search Employees

| Configuration panel  |                                   |   |
|--|-----------------------------------|---|
| Other settings   | Department                        | Manager   |
| Search Employees<br>TMA<br>Export Competencies<br>Standaard TMA competencies laden | Select Department                 | Select manager: *                                 |
| Review<br>Meerdere besprekingen<br>Configure HR circle                             | Employed O No longer employed All | Employed      No longer employed      All         |
| Terms  | Name Employee symbols tob title   | Department Date of employment Date Out of Envice  |
| Employee data<br>Administrators  | reame employee number you use     | Department Oate of employment Date Out of service |

Select a department or employees of a specific manager and then select 'No longer employed' and click the Search option. All former employees will now be listed.

| Configuration panel  | In this screen you can search Er                           | mployees by Department and Manager.                          |   |                    |                     |   |
|--|--|--|---|--------------------|---------------------|---|
| Organization-specific terminology  |  |  |   |                    |                     |   |
| Other settings   | D  | apartmont  |   | Manac              | 10F                 |   |
| Access levels  |  | parament   |   | Wanay              | Jei                 |   |
| Search Employees   |  |  |   |                    |                     |   |
| TMA  |  |  |   |                    |                     |   |
| TMA  | 103-Information a  | and Technology +   |   | Select manager     | - ( <b>P</b> )      |   |
| Export Competencies  |  |  |   |                    |                     |   |
| Standaard TMA competenties laden   |  |  |   |                    |                     |   |
| Review   | Employed I Note  | o longer employed 🛛 🛞 All                                    | (e) Er  | mployed 🛞 No longe | er employed 🕘 All   |   |
| Meerdere besprekingen  |  |  |   |                    |                     |   |
| Configure HR cycle   |  | 7  |   |                    |                     | 6 |
| Terms  | Search   |  |   |                    |                     | - |
| Configuration  | Name - Employee nu   | mber Job title   | Department  | Date of employment | Date Out of Service |   |
|  |  | 101 A 102 A 10   | 103-Information and Tech  |                    | 0.02.0000           |   |
| Employee data  |  |  |   | 2016/11/03         | 2017/05/31          |   |
| Employee data<br>Administrators  | 1009 Curry, Sergio 7539/63136                              | Functie 133-sports   | nology  |                    |                     |   |
| Employee data<br>Administrators<br>Business units  | 1009 Curry, Sergio 7539/63136                              | Functie 136-Shipping and Re                                  | nology<br>103-Information and Tech                                | 2015/09/01         | 2017/10/29          |   |
| Employee data<br>Administrators<br>Businers units<br>Competencies  | 1009 Curry, Sergio 7539/63136<br>1010 Hagan, Joey 5960/961 | Functie 136-Shipping and Re<br>ceiving                       | nology<br>103-Information and Tech<br>nology                      | 2015/09/01         | 2017/10/29          | ۲ |
| Employee data<br>Administrators<br>Business units<br>Competencies<br>Key values  | 1009 Curry, Sergio 7539/63136<br>1010 Hagan, Joey 5960/961 | Functie 135'sports<br>Functie 136'Shipping and Re<br>ceiving | nology<br>103-information and Tech<br>nology                      | 2015/09/01         | 2017/10/29          | ۲ |
| Employee data<br>Administrators<br>Busineis units<br>Competencies<br>Key values<br>Overview of job profiles                              | 1009 Curry, Sergio 7539/63136<br>1010 Hagan, Joey 5960/961 | Functie 136-Shipping and Re<br>ceiving                       | nology<br>103-Information and Tech<br>nology<br>rious 1 Next Last | 2015/09/01         | 2017/10/29          |   |
| Employee data<br>Administrators<br>Businets units<br>Competencies<br>Key values<br>Overview of job profiles<br>Departments (and related) | 1009 Curry, Sergio 7539/63136<br>1010 Hagan, Joey 5960/961 | Function 136-Shipping and Re<br>ceiving                      | nology<br>103-information and Tech<br>nology<br>rious 1 Next Last | 2015/09/01         | 2017/10/29          | ۲ |

To permanently delete these employees, click the delete icon and confirm your action.

| Departm  | ent  | Manager  |
|--|--|--|
| 03-Information and Techn   | employed 💿 All   | Select manager   |
| Search: Employee number<br>1009 Curry, Sergio<br>1010 Hagan, Joey 5960/961 | Job title<br>Functie 135-Sport<br>Functie 136-Shipping ar<br>ceiving | Delete Employee       ×         All files related to an employee will be deleted. Are you sure you want to permanently delete the employee 1009 Curry, Sergio? |
|  | ist  |  |

Once the confirmation is provided, the message will be displayed and the employee(s) will be deleted.

| ngs<br>guration panel   | in this screen you can search Employees by Deputitin 📀 Employee has been dek | eted successfully                          |   |
|---|--|--|---|
| anization-specific terminology<br>er settings<br>iss levels<br>ch Employees           | Department   | Manager                                    | ] |
| t Competencies<br>laard TMA competenties laden<br>gere besprekingen                   | 103-Internation and Technology     *   | Select nursager *                          |   |
| igure HR cycle<br>5<br>urrition<br>cycle data<br>instrators                           | Search Search Same Employee number Job title Departm No fems                 | ent Date of employment Date Out of Service |   |
| ness units<br>ipetencies<br>values<br>rview of job profiles<br>artments (and related) | First Previous New   | t Last                                     |   |
| questions<br>ngs<br>ategories   |  |  |   |

Please note: This is a permanent deletion. Once the employee is deleted, all the information such as review files, TMA score, and any personal files specific to the employee will be deleted.

# 4. GDPR Auto deletion of out of service employees

### Message

As part of GDPR, the out of service employees will be automatically deleted after 2 years.

### Solution

Talent Management will automatically delete employees who are out of service for more than 2 years. This process will run in the background and will keep track of all out of service employees. Once this period exceeds 2 years, the process will do a permanent delete.

Please note: This is a permanent delete Once the employee is deleted, all the information such as review files, TMA score, and any files specific to that employee will be deleted.

## **Changed and Improved**

## 5. Hide/ show HCM score on under review section

#### Message

Users have the option to hide/ show the HCM score on the review page (Overall summary).

### Solution

Users have the option to disable this option from the Setting page. See Setting  $\rightarrow$  Other Settings

| Other settings - A                | dministrator  |              |       |
|-----------------------------------|---|--------------|-------|
| ettings                           | System settings   |              |       |
| configuration cound               | <ul> <li>Include at least one key value in the job profile</li> </ul>                                   |              |       |
| Ornanization-specific terminology | @ Deviate from calculated final score (when weighting scores)   |              |       |
| Other settings                    | # Allow the role of employee allowed to enter data  |              |       |
| HALEDO ROPES                      | Allow access level MOC  |              |       |
| Search Employees                  | Period in which employees are identified as new (Groep) 1 days  |              |       |
| TMA                               | Allow the role of deputy/2nd manager  |              |       |
| Export Competencies               | R Email correspondence is active  |              |       |
| Standaard TMA competenties laden  | Use draft of review meeting for manager (the manager gives the employee access).                        |              |       |
| leview                            | Use draft of review meeting for employee (the employee gives the manager access).                       |              |       |
| Configure HR cycle                | Vice notification email in HR cycle lemoloyee to manager or manager to employee!                        |              |       |
| Terma                             | Benuts only show the IR outle data that has been set up   |              |       |
| onfiguration                      | Refer to any and the ref close data that has been as up   | fax          |       |
| Employee data                     | Reminder email repeat requency  | 10.          | unite |
| Administrators                    | U on of show total sches in Endbecordeingigespres.  |              |       |
| Competencies                      | Is show Directly to Endbeoordeingogesprex only after financed Doestallingengesprex_tr_English interview | S            |       |
| Keyvalues                         | Action plan is required in the event of insufficient performance  |              |       |
| Overview of job profiles          | # Show help   |              |       |
| Departments (and related)         | Use colour marking to indicate review parts that have been used   |              |       |
| Extra questions                   | Use colour marking for 'Last update by' others  |              |       |
| File categories                   | Show compare ratings' button in reviews   |              |       |
| Email templates                   | Eindbeoordelingsgesprek tab not visible in review for employee  |              |       |
| Reason for rating                 | Adjusting result agreements during review cycle   |              |       |
| sonus celculation                 | iet. Toon status gesprekken widget aan beheerder  |              |       |
| Werving                           | R Hide PDP learning objectives  |              |       |
| eedback                           | #. Show empty review parts as PDF   |              |       |
| Feedback settings                 | # Enable weighing within smart goals  |              |       |
| Ask for feedback                  |   |              |       |
| opport                            | # Show multi picke review   |              |       |
| Review guides                     | Enable HCM scores   |              |       |
| FAQ                               | Evolutional and a second former   | in No. w Ves |       |
| mport                             | obiliteration of enabling   |              |       |

The above option is enabled by default. If the user doesn't want to see the HCM score, they need to uncheck this. Once the option is disabled, the 'overall summary' page HCM score section will not be shown.

Employee review | Overall picture Tab .

| serm                       | Overall picture                                  |  |
|----------------------------|--|--|
| Employee data              | Total image Final assessment interview           |  |
| Action plans               | Last updated by # ADMIN # at 13/01/2016 08:37:08 |  |
| Personal situation         |  |  |
| Extra conversation         |  |  |
| Result areas               |  |  |
| Competences                |  |  |
| Core values                |  |  |
| Special projects           |  |  |
| POP / Career development   | The HCM section is not available anymore         |  |
| Overall picture            |  |  |
| Extra questions            |  |  |
| Final assessment interview |  |  |
| Closing                    |  |  |
| Closing                    |  |  |

## Solved Messages

## 6. Issue when selecting self score (change # 419179)

### Message

Multiple duplicate behaviour characteristics are shown while filling in the self score.

### Solution

This issue has been solved; the correct characteristics are now shown.

## 7. Search employee with partial personal number (change # 430114)

#### Message

When a user provides a partial personal number on the advanced Search screen, no data is shown. The search should display the information even when user provides partial text.

### Solution

This issue is solved; the correct result will be shown now.

## Release Notes Performance Management

Release 2018-02 Version 1.0

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| Solv     | red Messages  | 6      |
| 4.<br>5. | Unexpected error in Advance search screen (change #586524)<br>Issue with selection of report filters (change #558559) | 6<br>6 |

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. Report 'Review Status Per Department'

It is now possible to use the all new report to check how many employees have started their review. A new report is now available in Performance Management to show the percentage of employees which have started their reviews against the number of employees of the department.

| T STINITIONS IN  | an age theme          |                            |  |  |                              |                              | <ul> <li>Monthly and</li> </ul>         | 11 |
|--|-----------------------|----------------------------|--|--|------------------------------|------------------------------|---|----|
| Management infor   | nation - Review stat  | us per department          |  |  |                              |                              |   |    |
| sgement information  | Department: Arrowinge | transferent, 127, 1715 [9] | Haraper (Braze Karts Ners, Keld, Her De M.   |  |                              |                              | Stee word                               |    |
| tus muleu maetings   | Serveys 1 (100, 201)  | tad. Parise W              |  |  |                              |                              |   |    |
| and a local second second  | ALC: NOT THE OWNER    |                            | Contract Marcal  |  |                              |                              |   |    |
| the manufactory whether small a former lives of  | IL THE MET OF         |                            | And the state of t | Transfer Street  | 10.000                       | and the second second second |   |    |
| and that street for another as   | Code                  | Unit                       | Department   | Term ES  | Reviews started (percentage) | Reviews not started (as      | a percentagel Total number of employees |    |
| and and an   |                       |                            | (withograph) prevalences.  | 2017   |                              | 1                            | 100                                     |    |
| a of the other sectors in man  |                       |                            | 100 March 100 Ma | - Martin   |                              | 2                            |   |    |
| State and address to the   |                       |                            | const 1  | 2011   |                              | 2                            | 100                                     |    |
|  |                       |                            | 6444   | 2017   |                              | 1                            |   |    |
| second combining) structure and  |                       |                            | (here and here   | Chest P  |                              |                              |   |    |
| a chose shows wanting on an  |                       |                            |  | 4447   |                              | 70                           |   |    |
| daved there are have   |                       |                            | Production Comparison  | 2011   |                              | 20                           | 100                                     |    |
| Contraction of the local division of the loc |                       |                            | Conception and   | 2017   |                              | 2                            |   |    |
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|  |                       |                            | Patracopoliting  | 1000   |                              | -20                          | 100                                     |    |
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|  |                       |                            | Vaglanghets  | fiel   |                              |                              | 100                                     |    |
|  |                       |                            | International providences.   | Prevents   |                              | #                            | 200 1                                   |    |

### 2. Auto save functionality

You can now use the new functionality *Auto save* to save the entries in review tabs. You can also configure the duration for the auto save sequence. The duration is restricted to a maximum of 15 minutes. When a user does not manually click on save, there will be a pop-up (countdown 30 seconds). The user is asked whether they would like to auto save the data. If the user does not respond to the popup, any input of data will be automatically saved. If the user clicks on cancel, the data will not be saved.

| organization-specific terminology | B the retification enail in HR cycle (employee to manager or manager to employee)  | 1          |     |
|-----------------------------------|--|------------|-----|
| Other satcings                    | (#) Reports only show the HR cycle data that has been set up                       |            |     |
| Search Employees                  | Reminder email repeat finduency  | 13         | 001 |
| MA                                | E Do not show total scores in Lest plane   |            |     |
| TMA                               | Show Directly to Last phase only after finalized Ranning phase start interview.    |            |     |
| Standaard TMA competenties laden  | W Action plan is required in the sumt of insufficient performance                  |            |     |
| even                              | 2 One lab  |            |     |
| Configure HR cycle                |  |            |     |
| termi<br>offerration              | Contravel and other ideation Coord of a rideative -                                |            |     |
| Employee data                     | <ul> <li>Use corour manung to makete revew parts that have been used</li> </ul>    |            |     |
| Administrations                   | 46 the colors matched for the checker of others.                                   |            |     |
| Dubiness units                    | Shew compare ratings button in reviews   |            |     |
| Competences                       | End Score 1 tab not visible in review for employee                                 |            |     |
| Overview of job profiles          | # Adjusting result agreements during review cycle                                  |            |     |
| Departments (and related)         | Toon status gesprökken weget aan beheerder   |            |     |
| Additional questions              | Hide PDP learning objectives   |            |     |
| File categories                   | (g) Show empty review parts as IDF   |            |     |
| fmail templates                   | if Enable weighing within smart goals  |            |     |
| Reason for rating                 | @ Toon NO register informatie  |            |     |
| openus calculation<br>opiciu      | e integration with recruitment module  |            |     |
| Warving                           | One shines and the absence already on  |            |     |
| wedlack                           | D Orea and inclusion   |            |     |
| Resiback settings                 | In some of the same  |            |     |
| Oundernaire                       | signly remember for pertindants  | 0.00 E 100 |     |
| Support                           | Eckty Reminder Precuency   | 1 days     |     |
| Review guides                     | The number of days before which the certificate expiration seminder should be sent | 32 days    |     |
| FAQ .                             | e feable auto sive functionality   | 15 minutes |     |

You need to enable the Auto save functionality on settings page.

| Status review meetings | - Last phase - 102<br>Term eng<br>Employee data   | Warning Because you are not active, the data is saved automatically <b>0</b> . 14 Click Yes if you want to save now or click No to cance   |        |
|------------------------|---|--|--------|
|                        | Action Plan<br>Course Contents  | Improvement action 📵   |        |
|                        | Special Project<br>POP / Loopbaanontwikke<br>Overall Picture<br>Additional questions<br>End Score-1<br>Seal-1 | Progress information     Weighting     25.00     %     (a)     (a) | • Selo |

If a user is not active in entering data for 15 minutes, a pop up message will be shown asking for confirmation for saving the entered data.

## Changed and Improved

## 3. Provide own terminology for End score header text

### Why

You now have a new option available when setting the organization-specific terminology.

| Settings   | Review meeting names Revi                                | ew meeting parts Other terminology  | Phase system     | Rating scales      | HR cycle legend         | Signature         | HCM                         |
|--|--|---|------------------|--------------------|-------------------------|-------------------|-----------------------------|
| Configuration panel Organization-specific terminology Other settings | Please note that if you of<br>description, both of whice | hange the titles/descriptions they will no longer co<br>ch will be shown in the HR Cycle. | mespond with the | terminology in the | help texts and review g | uides. Besides th | ie title, you can also give |
| Access levels  | Competency file  | Competency file   |                  |                    |                         |                   | Translate                   |
| Search Employees   | Training programmes                                      | Training programmes   |                  |                    |                         |                   | Translate                   |
| TMA  | Pracondition   | Dessentition  |                  |                    |                         |                   | Teneriste                   |
| Export Competencies  |  | Freedballon   |                  |                    |                         |                   | Transiane                   |
| Standaard TMA competenties laden                                     | Results agreement  | Results agreement   |                  |                    |                         |                   | Translate                   |
| leview   | Improvement action                                       | Improvement action  |                  |                    |                         |                   | Translate                   |
| Configure HR cycle<br>Terms  | Action plan  | Action plan   |                  |                    |                         |                   | Translate                   |
| Configuration  | Blank review   | Blank review  |                  |                    |                         |                   | Translate                   |
| Employee data<br>Administrators                                      | HR cycle term  | HR cycle term   |                  |                    |                         |                   | Translate                   |
| Business units   | Assessment period  | Assessment period   |                  |                    |                         |                   | Translate                   |
| Competencies   | Extra review meeting                                     | Extra review meeting  |                  |                    |                         |                   | Translate                   |
| Overview of job profiles   | Strategic workforce planning                             | Strategic workforce planning  |                  |                    |                         |                   | Translate                   |
| Departments (and related)<br>Additional questions                    | Group  | Group   |                  |                    |                         |                   | Translate                   |
| Training programmes  | Final review   | End score   |                  |                    |                         |                   | Translate                   |

It is possible to enter a specific term for the end score header text. This is shown in the end score tab of a review.

### How

| Term eng<br>Employee data | End Sco                  | ore-1            | Tedama |       |
|---------------------------|--------------------------|------------------|--------|-------|
| Action Plan               | End Score-1              | weighting ractor |        | no re |
| Personal Object           | tives Final score        |                  | Select | •     |
| Extra review m            | eeting Reason for rating |                  | Select | •     |
| Result                    | Netes                    |                  |        |       |
| Competencies              | Notes                    |                  |        |       |
| Core Values               |                          |                  |        |       |
| POP / Loopba              | anontwikkeling123        |                  |        |       |
| Overall Picture           |                          |                  |        |       |
| Additional que            | stions                   |                  |        |       |
| End Scote-1               |                          |                  | A      |       |

The term you have entered for *Final review* in your organization-specific terminology section is shown in the review tab.

## Solved Messages

## 4. Unexpected error in Advance search screen (change #586524)

### Message

Whenever a user was trying to search for an employee in the advance search screen, they got an unexpected error.

#### Solution

The user will now be able to search for an employee using the advance search screen without any disturbance.

## 5. Issue with selection of report filters (change #558559)

#### Message

Whenever a user was trying to filter employees in the *Review status* and *Scores* reports using the filter on department, the results shown were incorrect.

### Solution

Using the filter on department will now lead to the correct data.

## Release Notes Performance Management

Release 2018-01 Version 2.0

## Contents

| Ne       | W  | 3      |
|----------|--|--------|
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| 2.<br>3. | More scale options<br>TMA functionality improvements                           | 8<br>8 |
| Sol      | ved Messages   | 8      |
| 4.       | Diacritic signs in attached filename in the Function profile (change # 160555) | 8      |

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. Multi-cycle reviews

### Why

In Performance Management a particular company could only have one cycle for all its employees, something which was an unwanted limitation for many of our customers. This new Multi-cycle feature enables you to choose your own review cycles and phases, either at Department, Job function, or Employee level.

### How

In order to be able to use this functionality, you can log in as Administrator and enable the functionality from settings page.

After installing these release, you have the option to configure the Multi-cycle functionality at Department, Job function, or Employee level in order do your review cycle more flexibly. You just have to follow the workflow below:

- Enable the Multi-cycle feature
- Setup your own terminology
- Configure the new cycles by Departments, Job functions, or Employees.
- Setup the phases of your new cycles
- Start the employee's review

### Enable the Multi-cycle feature

First, you have to enable the feature within the **Settings** page: *Settings* | *Other settings* | *Show multi-cycle review* 

| 🗄 🙊 Performance                   | Management   |                |      | 8 | C Administrator |   | ?  |
|-----------------------------------|--|----------------|------|---|-----------------|---|----|
| Other settings - /                | Administrator  |                |      |   |                 | E | 00 |
| Settings                          | Reminder email repeat frequency  | 7              | days |   |                 |   |    |
| Configuration panel               | Do not show total scores in Final Phase ENG.                                       |                |      |   |                 |   |    |
| Organization specific terminology | Show Directly to Final Phase ENG only after finalised asclasd interview.           |                |      |   |                 |   |    |
| Other settings<br>Access levels   | Adion plan is required in the event of insufficient performance                    |                |      |   |                 |   |    |
| Search Employees                  | Show help  |                |      |   |                 |   |    |
| AA                                | Default weighting when adding review meeting part in the HR cycle 3 V              |                |      |   |                 |   |    |
| Ixport Competencies               | Use colour marking to indicate review parts that have been used                    |                |      |   |                 |   |    |
| mport Competenties                | Use colour marking for tast update by others                                       |                |      |   |                 |   |    |
| riew<br>Initial content           | Show 'compare ratings' button in reviews   |                |      |   |                 |   |    |
| Configure HR cycle                | End Score-1 tab not visible in review for employee                                 |                |      |   |                 |   |    |
| ems.                              | Acjusting result agreements during review cycle                                    |                |      |   |                 |   |    |
| riguration                        | Toor status gesprekken widget aan beheelder  |                |      |   |                 |   |    |
| idministrators                    | Hide PDP learning objectives   |                |      |   |                 |   |    |
| Business units                    | Show empty review parts as PDI   |                |      |   |                 |   |    |
| Competencies<br>Tore Values       | Inable weighing within smart goals   |                |      |   |                 |   |    |
| overview of job profiles          | Toon BIG register informatie   |                |      |   |                 |   |    |
| Repartments (and related)         | integration with recruitment module  |                |      |   |                 |   |    |
| Nainings                          | Show strategic workforce planning information                                      |                |      |   |                 |   |    |
| file categories                   | Show multi octensiaw   |                |      |   |                 |   |    |
| Imail templates                   | Empty commodule the cost Brades  | C) 100 (0) 105 |      |   |                 |   |    |
| Reason for rating                 | Lipty remove to certificates   |                |      |   |                 |   |    |
| PDOL                              | cipity remined instancy  | () whys        |      |   |                 |   |    |
| Mountine                          | The number of days before which the certificate expiration reminder should be sent | 60 0465        |      |   |                 |   |    |

#### Setting-up the terminology

You can choose the terminology you want to use for Multi-cycle in your company within the **Settings** page: *Settings* | *Organization-specific terminology* | *Other terminology* | *Multi cycle review* 

| 🛨 🤏 Performance  | Management                                    |   |                         |                    |                         | Search           |                 | P              | C Administrator | <br>C |
|--|---|---|-------------------------|--------------------|-------------------------|------------------|-----------------|----------------|-----------------|-------|
| Organization-spe   | cific terminology - Admi                      | inistrator  |                         |                    |                         |                  |                 |                |                 |       |
| Settings   | Review meeting names Re                       | even meeting parts Other terminology  | Phase system            | Rating scales      | HR cycle legend         | signiture        | HCM             |                |                 |       |
| Configuration panel<br>Organization specific terminology<br>Other settings | Peece note that if you description, both of w | a change the tilles/descriptions they will no long<br>high will be shown in the HR Cycle. | r correspond with the t | terminology in the | help texts and review ( | uides. Besides t | he fille, you c | an also give a |                 |       |
| Access levels  | Competency file                               | Competentiedassier  |                         |                    |                         |                  |                 | Translate      |                 |       |
| Search Employees   | Training programmic                           | Trainings   |                         |                    |                         |                  |                 | Translate      |                 |       |
| TMA  | Frecondition                                  | Pandyoonwoarde  |                         |                    |                         |                  |                 | Translate      |                 |       |
| Faport Competencies<br>Import Competenties                                 | Results agreement                             | Resultantafspraak-NL  |                         |                    |                         |                  |                 | Translate      |                 |       |
| Review   | Improvement action                            | Verbeteractie   |                         |                    |                         |                  |                 | Translate      |                 |       |
| Multicycle review<br>Continum HB cycle                                     | Action plan                                   | Acteplan  |                         |                    |                         |                  |                 | Translate      |                 |       |
| Tems   | Bankreview                                    | Elanco beoordeling  |                         |                    |                         |                  |                 | Translate      |                 |       |
| Configuration<br>Employee data   | HR cycle term                                 | Becordelingsperiode   |                         |                    |                         |                  |                 | Translate      |                 |       |
| Administrators   | Assessment period                             | Becordelingstermijn new sofd  |                         |                    |                         |                  |                 | Translate      |                 |       |
| Business units<br>Competencies   | Extra review meeting                          | Extra gesprek test  |                         |                    |                         |                  |                 | Translate      |                 |       |
| Core Values  | Professional competience                      | Vakbelovaamheid   |                         |                    |                         |                  |                 | Translate      |                 |       |
| Overview of job profiles<br>Departments (and related)                      | Strategic worklover planning                  | Strategic workforce planning  |                         |                    |                         |                  |                 | Translate      |                 |       |
| Additional questions   | Group   | Groep   |                         |                    |                         |                  |                 | Translate      |                 |       |
| Trainings<br>file categories   | Multi cycle review                            | Multicycle review   |                         |                    |                         |                  |                 | Translate      | 1               |       |
| Leval tamplates  | Sare  |   |                         |                    |                         |                  |                 |                |                 |       |

#### **Configure the new cycles**

To configure the cycles, you have to access the **Multi-cycle review** setup page: *Settings* | *Review* | *Multi cycle review* 

Here you can create new cycles or edit the existing ones. Keep in mind that you can only delete a cycle if nobody has already started a review on it.

| 🕂 🙈 Performance                   | Management         |   | 9 | C Administrator | Ŧ | G |
|-----------------------------------|--------------------|---|---|-----------------|---|---|
| Multi cycle review                |                    |   |   |                 | Ð |   |
| Settings                          | Di orfantan        | ena in usual for services functioner alassestmants and astronomate to a manifer extension to list than to the union ourise  |   |                 |   |   |
| Configuration panel               |                    | de sense er werde se receil odde en er a sense de den er er desse gendled er sensen er er werde de m  |   |                 |   |   |
| Organization-specific terminology | Name               | Description   |   | Action          |   |   |
| Access levels                     | Blue collar cycle  | Blue collar cycle   |   |                 |   |   |
| Sourch Employees                  |                    | Contract of the second s |   |                 |   |   |
| The                               | White collar cycle | White collar cycle  |   |                 |   |   |
| Export Competencies               |                    |   |   |                 |   |   |
| Import Competenties               |                    |   |   |                 |   |   |
| teview                            |                    |   |   |                 |   |   |
| Multi cycle review                |                    |   |   |                 |   |   |
| Tarmi                             |                    |   |   |                 |   |   |
| Configuration                     |                    |   |   |                 |   |   |
| Employee data                     |                    |   |   |                 |   |   |

When you create a new cycle you have to choose the Departments, Job Functions, or Employees whom will be evaluated on it.

| 🗄 🙈 Performance N                 | Manageme        | ent  |                            |                                   | Search employee             | P C Admini   | utratile   |   | ? |
|-----------------------------------|-----------------|--|----------------------------|-----------------------------------|-----------------------------|--------------|------------|---|---|
| Multi cycle review                |                 |  |                            |                                   |                             |              |            | Ľ | 0 |
| Settings                          | 1               | with writes may be and to write functions dependence   |                            | the extension Malick will be used | the first the sector sector |              |            |   |   |
| Configuration panel               | Uman            | enguration page is uses to assign functions, departme  | no ano employees to paraca | ar category writin will be use    | to to the to levely choice  |              |            |   |   |
| Diganization-specific terminology |                 |  |                            |                                   |                             |              |            |   |   |
| Other settings                    | Add Multi C     | ycie review  |                            |                                   |                             |              |            |   |   |
| Access levels                     | A DOM THAT      |  |                            |                                   |                             |              |            |   |   |
| Search Employees                  | Name *          | White collar cycle   |                            |                                   |                             |              |            |   |   |
| ГМА                               |                 |  |                            |                                   |                             |              |            |   |   |
| TMA                               | Description     |  |                            |                                   |                             |              |            |   |   |
| Export Competencies               |                 |  |                            |                                   |                             |              |            |   |   |
| standaard 1 MA competenties tades | Job tide        | Select jub proble  |                            |                                   |                             |              | DO         |   |   |
| Mark and an and a second          | 2012/02/02      |  |                            | Employee name                     | Select employees            |              | - <b>D</b> |   |   |
| Configure HB code                 | Department      | 105-Information Security   | •                          |                                   |                             |              |            |   |   |
| Terms                             | · · · · · ·     |  |                            |                                   |                             | -            |            |   |   |
| Configuration                     | Function        | S Searchu  |                            | Employees                         |                             | Search:      |            |   |   |
| Employee data                     |                 |  |                            |                                   |                             |              |            |   |   |
| Administrators                    | Job title       |  | Action                     | Employee name                     | loo title                   | Department   | Action     |   |   |
| Business units                    | Functie 105-Lin | quistics   |                            | 949 Hoskins, Bert                 | Functie 101-Sales           | 103-Chemical |            |   |   |
| Competancies                      |                 |  |                            |                                   |                             |              |            |   |   |
| Core Values                       |                 |  |                            |                                   |                             |              |            |   |   |
| Overview of job profiles          |                 |  |                            |                                   |                             |              |            |   |   |
| Departments (and related)         |                 |  |                            |                                   |                             |              |            |   |   |
| Additional questions              |                 |  |                            |                                   |                             |              |            |   |   |
| Training programmes               | Departm         | ents search  |                            |                                   |                             |              |            |   |   |
| Final templates                   |                 | and the second sec |                            |                                   |                             |              |            |   |   |
| Reason for rating                 | Department      |  | Action                     |                                   |                             |              |            |   |   |
| Bonus calculation                 | 105-informatio  | n Carsulas (   | ()                         |                                   |                             |              |            |   |   |
| PDCL                              | no morrado      | a second   |                            |                                   |                             |              |            |   |   |
| Wening                            |                 |  |                            |                                   |                             |              |            |   |   |
| Feedback                          |                 |  |                            |                                   |                             |              |            |   |   |
| Feedback settings                 |                 |  |                            |                                   |                             |              |            |   |   |
| Ask for feedback                  |                 |  |                            |                                   |                             |              |            |   |   |

At this point there may be a conflict when an employee with a Job function belongs to a Department which is in a different cycle. For example:

- Job function: Manager -> Cycle 1 •
- Department: Sales -> Cycle 2
- For John Smith (Manager of Sales) there will be a conflict •

In that case the system applies a priority order to choose the cycle, so that the priority will be:

- Cycle set up for the employee
   Cycle set up for the job function
- 3. Cycle set up for the department

The multilingual translations can be added when editing the cycle.

| lame *      | Blue collar        |            |
|-------------|--------------------|------------|
| Description |                    | ۲          |
| ob title    | Select job profile | •          |
| Department  | Select Department  | <b>_</b> _ |

### Setting-up the cycle phases

Once the cycle has been defined, you have to choose its phases: *Settings* | *Review* | *Configure HR cycle* 

| 🕂 🙊 Performance                   | Management                              |  |   | Search residure : 9                               | Administrator | G |
|-----------------------------------|---|--|---|---|---------------|---|
| Configure HR cyc                  | le - Administrator                      |  |   |   |               |   |
| Settings                          |   |  |   |   |               |   |
| Configuration panel               | Enter the types of review meets         | ng applicable to your organization. You can also | change the sequence within the review meeting | types by moving the review meeting parts up or do | an.           |   |
| Organization-specific terminology | Multi cycle review Category White colla | r cycle  |   |   |               |   |
| Acues levels                      | El Passing abuse                        | 1 Ist Phase on 68                                | 2ad Phone DiG                                 |   |               |   |
| Search Employees                  | D. and J. and                           | C Optional                                       | C Optional                                    | Cartan  |               |   |
| TMA                               | E Torm                                  | Tom.   | Tem   | Tem   |               |   |
| Export Competencies               | Employee data                           | Employee data                                    | Employee data                                 | Employee data                                     |               |   |
| Review                            | Pahce                                   |  |   |   |               |   |
| Mult cycle review                 | E Acton Pan                             | Action Plan                                      | Action Plan                                   | Action Plan                                       |               |   |
| Configure HR cycle                | Personal Objectives                     | Personal Objectives                              | Personal Objectives                           | Personal Objectives                               |               |   |
| Configuration                     | Preiminary Score                        | Preliminary Score                                | Preliminary Score                             | Prelininary Score                                 |               |   |
| Employee data<br>Administrators   | ResultArea12                            | EsultArea12                                      | ResultArea12                                  | ResultArea12                                      |               |   |

#### Start the employee's review

When the employee starts a new review, the system will apply the corresponding cycle to the employee according to the configuration.

| 🗪 Perfor   | mance Management                |                         | 110 Briggs, Johanna   | Search employment | 8 | C Administrator | ( |
|------------|---------------------------------|-------------------------|-----------------------|-------------------|---|-----------------|---|
| 🙊 Status r | eview meetings — White collar c | ycle — Planning phase – | – 110 Briggs, Johanna |                   |   |                 |   |
|            | Term                            | Employee                | data                  |                   |   |                 |   |
|            | Pahse                           | 110 Briggs, Johanna     |                       |                   |   |                 |   |
|            | Action Plan                     | Employee number         | 176/1                 |                   |   |                 |   |
|            | Barroral Objection              | Employed since          | 01-Jan-1993           |                   |   |                 |   |
|            | re who objectives               | to be a series          | A contract the term   |                   |   |                 |   |

#### Checking the reviews progress

You can the check the progress of the reviews with a new report:

1. First of all, setup the access level: Settings | Access levels | Management information | Planned reviews

| Performance   | Management  |    |  | P Administrator |  |
|---|---|----|--|-----------------|--|
| 🕘 🞇 Edit access level -                                 | Manager   |    |  |                 |  |
| ettings   | Agendative  | 2  |  | 0               |  |
| enfiguration panel<br>Organization-specific terminology | Prepare review meetings                           |    |  |                 |  |
| Other settings  | Read review meeting guides for the employee level |    |  |                 |  |
| Access levels   | Read review meeting guices for the manager level  |    |  | Ø               |  |
| Search Employees<br>MA                                  | Read frequently asked questions                   |    |  |                 |  |
| TMA   | Management Information                            |    |  |                 |  |
| Export Competencies<br>Standaard TMA competenties laden | Status of review meetings                         |    |  |                 |  |
| aview   | Scores  |    |  |                 |  |
| Multi cycle review<br>Configure HR cycle                | Review status with final score per employee       | 63 |  | a               |  |
| Terms   | Detailed final scores per employee                |    |  |                 |  |
| onfiguration  | Competencies                                      |    |  |                 |  |
| Employee data<br>Administrators                         | Status of training programmes                     |    |  |                 |  |
| Business units  | Feedback: competency scores                       |    |  |                 |  |
| Competencies<br>Core Values                             | Feedback competency scores per employee           |    |  |                 |  |
| Overview of job profiles                                | Signing datestast phase                           |    |  |                 |  |
| Departments (and related)                               | Gesprekudata HR cyclus                            |    |  |                 |  |
| Additional questions<br>Training programmes             | Progress Smart Goals with Weightage               |    |  |                 |  |
| File categories   | Planned reviews                                   |    |  | 63              |  |

#### 2. Start the report: *Management information* | *Planned reviews*

| 🗧 🗪 Performance Management  |                      |                         |                                  |                          |                      |                     |      | 8         | C Administrator       |              | ?  |
|---|----------------------|-------------------------|----------------------------------|--------------------------|----------------------|---------------------|------|-----------|-----------------------|--------------|----|
| Management inform   | nation - Plan        | ned reviews             |                                  |                          |                      |                     |      |           |                       |              |    |
| Aanagement information  | Departments          | 101-Services, 10        | 101-Services, 102-Engineering, W |                          | Nose, Genvesite K    | ungen, Test #       |      |           |                       |              | 1  |
| Status review meetings  | 3ob profèe:          | None, Functie 11        | 0-Feod, Functi                   | Team:                    | Algemese Zakon, B    | elaid en Sch        |      |           |                       |              |    |
| Scores  | Managers             | None, Jansi, Dest       | , Danial, , Jas M                | Term:                    | new term             | w                   |      |           |                       |              |    |
| Progress smart goals with weightage.  | Moordere bespre      | kingen: Default, ABCod, | Blue cellar cycl 🛩               | Stage:                   | Sot Phase on CB fire | iched, 1st P 🐭      |      |           |                       |              |    |
| Detailed final scores per employee  |                      |                         |                                  |                          |                      |                     |      |           |                       |              |    |
| Competencies  | 44 4 a               | d 27 1 1 4              | First                            | Diest M                  | de.                  |                     |      |           |                       |              |    |
| Status of training programmes   | Employment<br>number | Employee                | Date of<br>employment            | Job                      | Department           | Manager(s)          | Team | Term      | Meerdere besprekingen | Review state | us |
| Feedback: competency scores per emp<br>HR cycle review meeting dates<br>ligning dates last phase<br>Planned reviews | \$737/1              | Abraham, Terrell        | 01-09-2006                       | Functie 1-Tool<br>Design | TO Gardening         | 93 Feldman, Alberio |      |           |                       |              |    |
|   | 203/1                | Abrams, Brent           | 07-09-1987                       | Functie 15-BPO           | 81-Training          |                     |      | - 14<br>- |                       |              |    |
|   | 7299/1               | Acosta Israel           | 02-09-2013                       | Functie 42-<br>Marketing | 65-Textile           | 650 Johnston, James |      | -         |                       |              |    |
|   | 7100/45115           | Longto Lunal            | 08.04.3016                       | Constin 8.4              | 113 Cantenian        |                     |      |           |                       |              |    |

| 🕂 💐 Performance M  | anagemen            | t  |                                 |                           |                  | 1                        |   | 9 | Administrator                               | . (             |
|--|---------------------|--|---------------------------------|---------------------------|------------------|--------------------------|---|---|---|-----------------|
| 🕘 🔇 🔄 Managementinform   | atie - Gepland      | e gesprekken                               |                                 |                           |                  |                          |   |   |   |                 |
| Managementinformatie   | Afdeling:           | 101-Services 1                             | 101-Services: 101-Engineering * |                           | alt Long Comeant | e Kamper; Tect M         |   |   |   | Easoar          |
| Status gelpiekken  | Functieprofiek      | unctieprofiek Leeg: Functie 100-Pood; Func |                                 | Team:                     | Algemene Zake    | n: Beleid en Sul M       |   |   |   | Linter          |
| Scores   | Leidinggevende:     | Leeg: jansi, test                          | : . Danial: , Jas M             | Termen:                   | 2017             | M                        |   |   |   |                 |
| Voortgang smart goals with weightage   | Heestere bestrekt   | nees: Details annat                        | Then collar coclar              | Value                     | Int phase on the | atomototoc m             |   |   |   |                 |
| Sesprecolatus met eindscore per meoi   |                     | The second second                          |                                 | 100000                    |                  |                          |   |   |   |                 |
| Gedetalleerde eindscorks per medewer   | 14 4 11 14          |  | 1.6                             | ditutante R               | • 161            | 10000                    |   |   |   |                 |
| Lonpetimbes  | Direct schender     | 11.1                                       | Outran In                       |                           | Addation         | I while a surround which | * |   | Manuface becautions                         | Charles and and |
| Status opfeldingen<br>Feedbalc competentiescores<br>Feedbalc competentiescores per mede<br>Gesprekodata Hit Cyclus<br>Ondertekendata tast phase<br>Geplande gesprekken | Cherosterio antani. | HIGHNERE                                   | dienst                          | ranco.                    | Arotany          | Leaninggerenzeine        |   |   | area or | sama Şeshrei    |
|  | 5737/1              | Abraham, Terrell                           | 01-09-2006                      | Functie 1-Tool<br>Design  | 70-Gardening     | 93 Feldman, Alberto      |   |   |   |                 |
|  | 203/1               | Abrams, Brent                              | 07-09-1987                      | Functie 15-BPD            | 81-Training      |                          |   | + |   |                 |
|  | 7299/1              | Acosta, Israel                             | 02-09-2013                      | Functie-42-<br>Marketing  | 63-Textile       | 650 Johnston, James      |   |   |   |                 |
|  | 7299/45125          | Acosta Israel                              | 08-04-2016                      | Functie 84-<br>Purchasing | 112-Gardening    |                          |   | + |   |                 |
|  |                     |  |                                 | 1                         |                  |                          |   |   |   |                 |

Many other reports have been updated to ensure that they are completely compatible with the Multi-cycle feature:

- Status review meetings
- Scores
- Review meeting status including final scores per employee medewerker)
- Detailed final scores per employee
- HR cycle review meeting dates

The report models were also updated.

Performance Management - Version 2.0 Release 2018-02

### Your action

In order to be able to use this functionality, you can log in as Administrator and enable the functionality from settings page.

### **Changed and Improved**

### 2. More scale options

#### Message

It is not possible to evaluate the employees with a 6 point scale.

### Solution

We have now added all the missing scales, so it is now possible to evaluate employees from 2 to 10 point scales.

### 3. TMA functionality improvements

#### Message

Currently the TMA import competency can only be done once from the Import page. This is because if the TMA competencies are imported on top of previously imported competencies, there is a risk of data corruption due to mismatch of competency codes.

We have also fixed some issues on the employee passport download, so that it is now working correctly.

### Solution

If you now need to import the TMA competencies into your company again, you will have to contact our Customer service.

### Solved Messages

## 4. Diacritic signs in attached filename in the Function profile (change # 160555)

#### Message

It is not possible to use diacritics in Name when adding attachment to the Function profile.

### Solution

You can now use diacritics in the name of the file attached.