Release Notes
Performance Management

Release 2018-11

Version 1.0

Table of Content

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
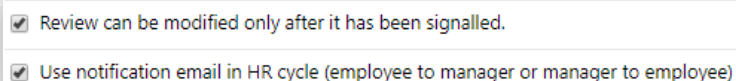
Why

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.


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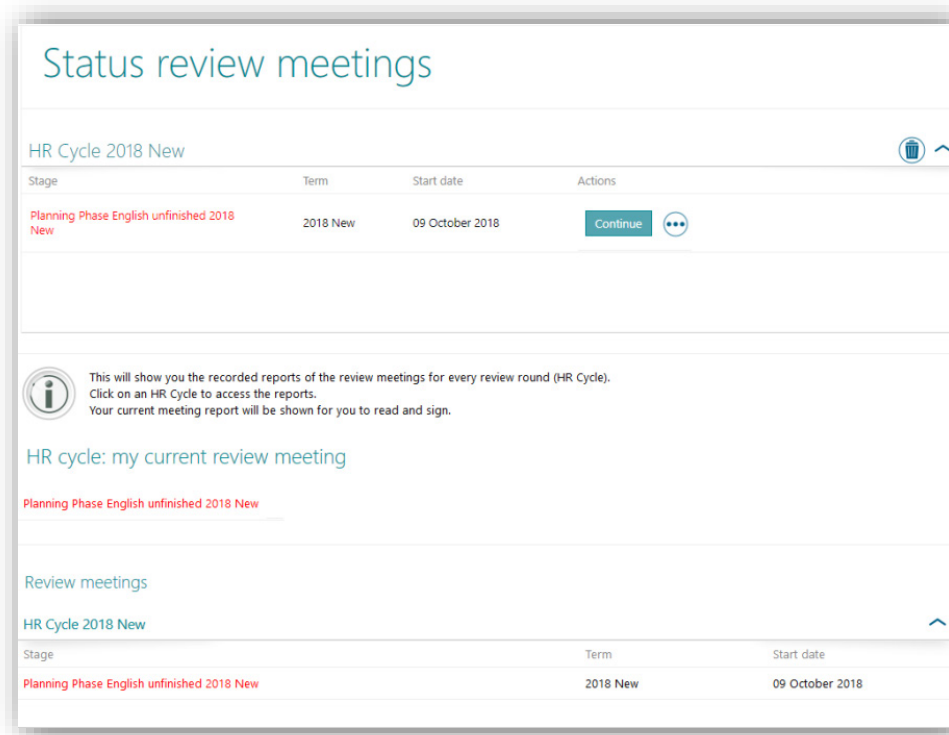
When the manager starts editing the phase for a review the **Continue** button is not visible to the employee, and the HTML view will not be clickable.

If the employee starts editing the phase, the **Continue** button is not visible to the manager and the HTML view will not be clickable.
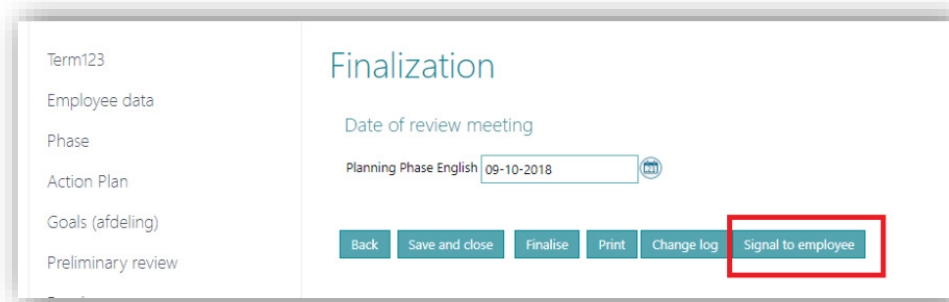
After the Manager signals the employee, he or she can access the review.

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

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

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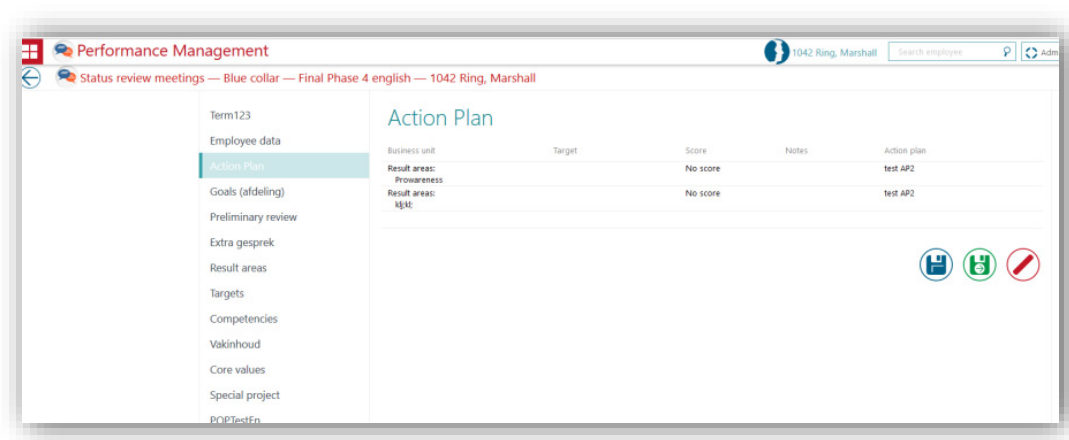
Now the Action plan from the 2nd review appears in the final (4th) review.

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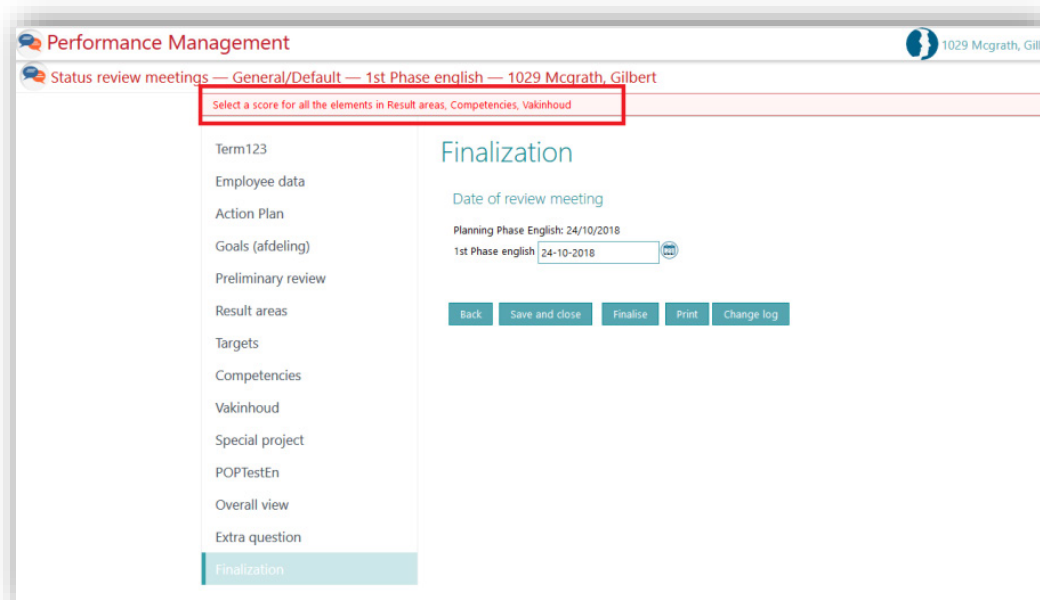
Now the error message is displayed based on the availability of five tabs (*Competencies, Core values, Special project, Result areas*, and *Job knowledge*).

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Performance Management

Release 2018-10

Version 1.0

Table of Content

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:

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

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:

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.

Release Notes
Performance Management

Release 2018-08

Version 1.0

Table of Content

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.
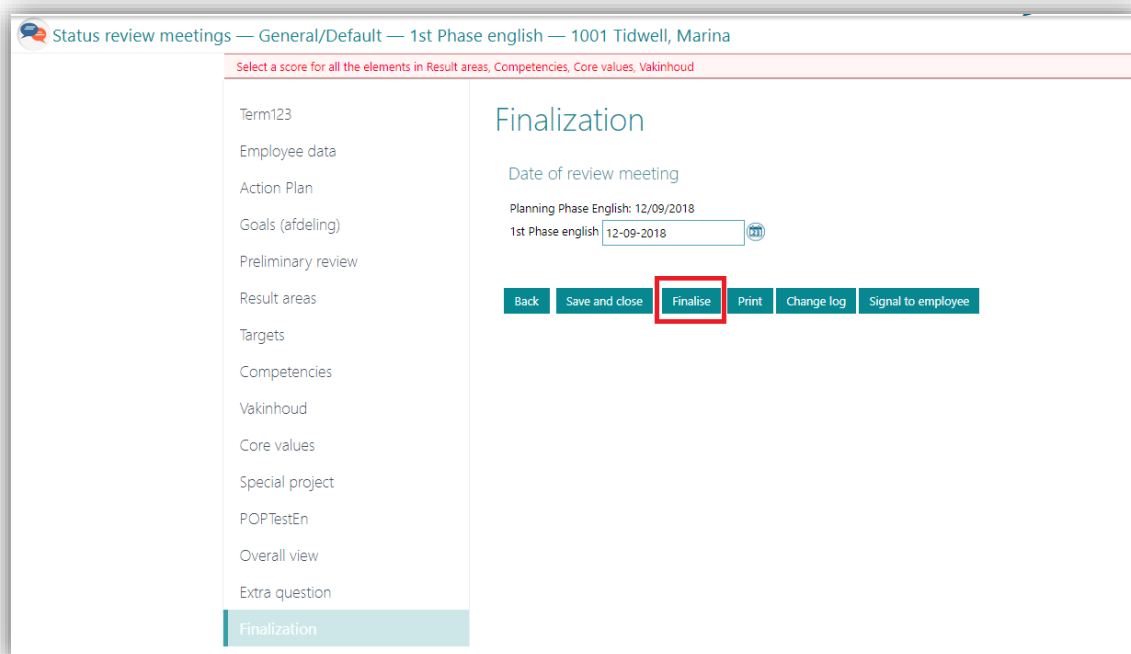
How

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
  - o 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.
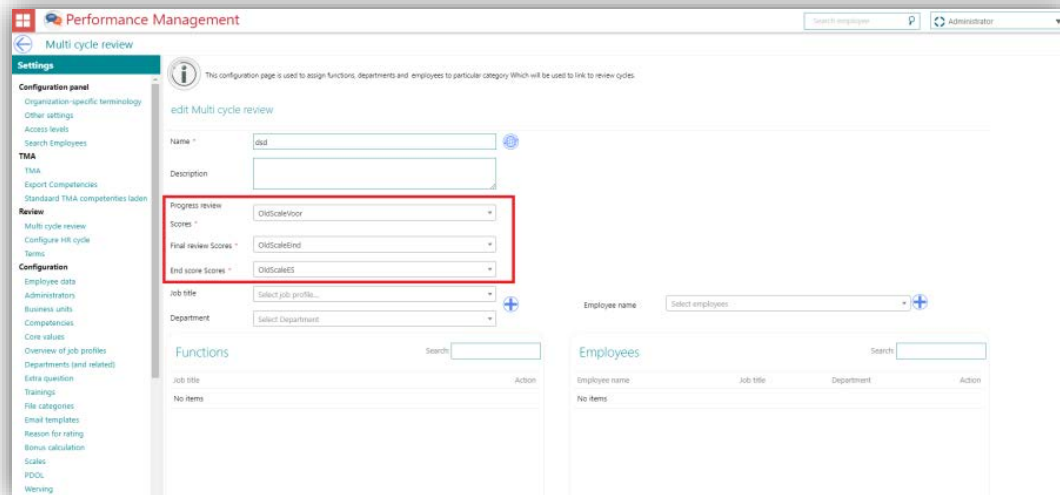
Newly configured scales will be applicable to new reviews.
Click on Save and you will see a popup as shown below
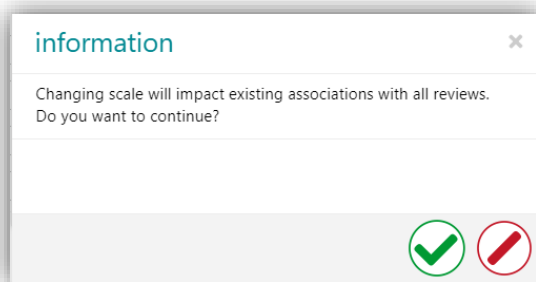
Click on Yes to save the changes. Click on No to stay on the same page.

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 .

Trainings: possible Expiration of workflow	PM	1	Added employee's name
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

Table of Contents

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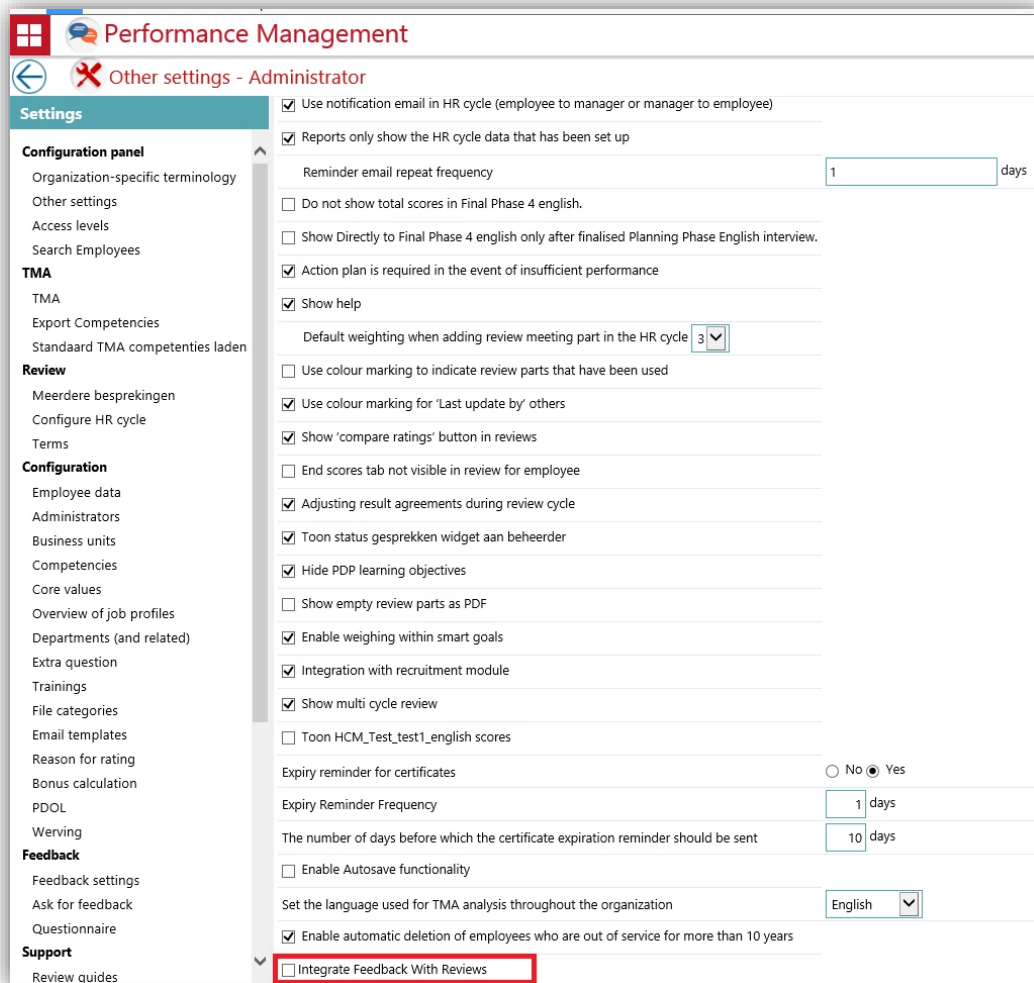
This setting provides flexibility to all Performance Management customers for enabling or disabling the integrated functionality. This helps managers, other upper management staff and employees during their performance review by making sure all information on employee feedback is available during the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

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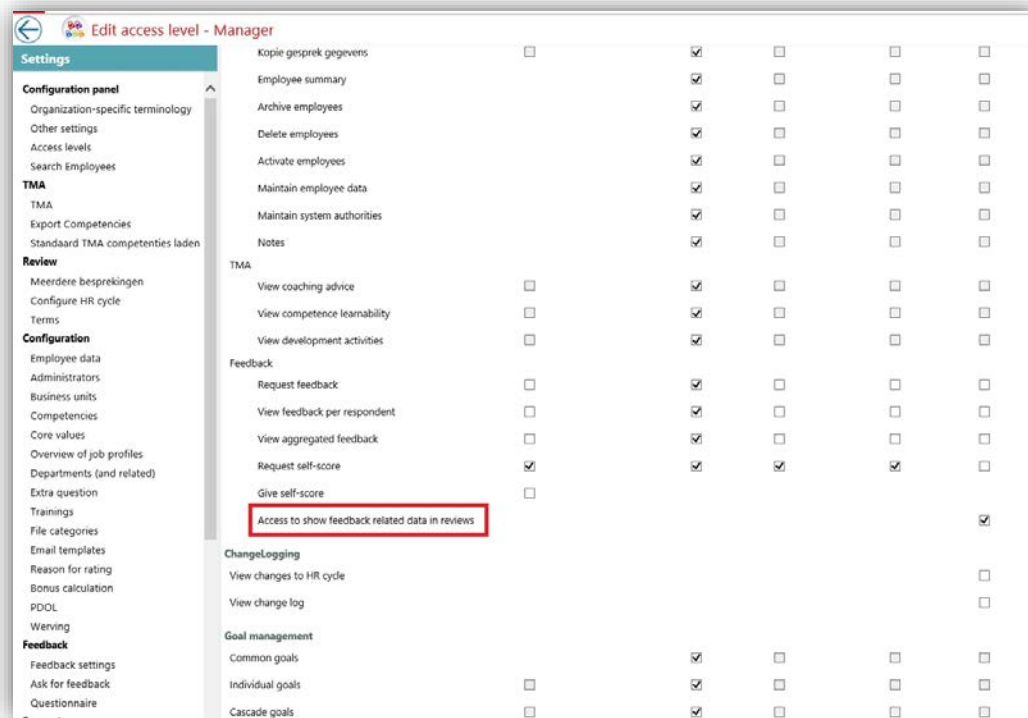
Performance cycle page - Displaying feedback scores under every Competency and Core Value

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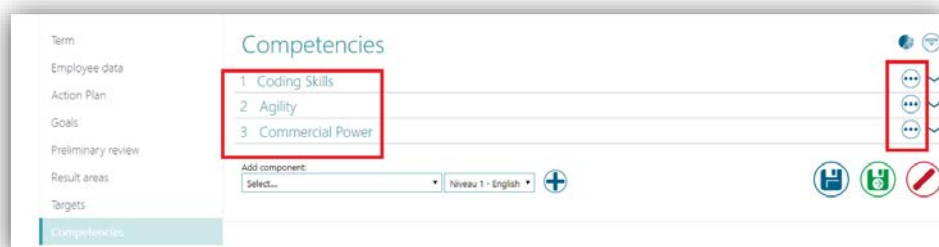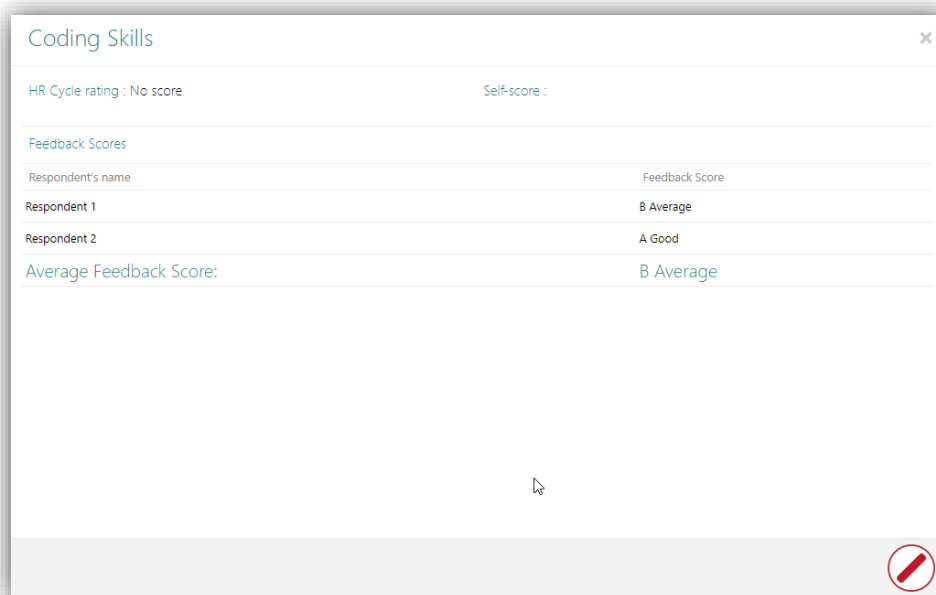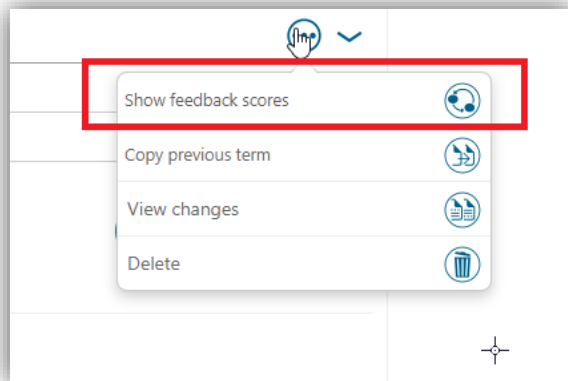
Performance cycle page- Redirection to feedback detail summary page in new tab

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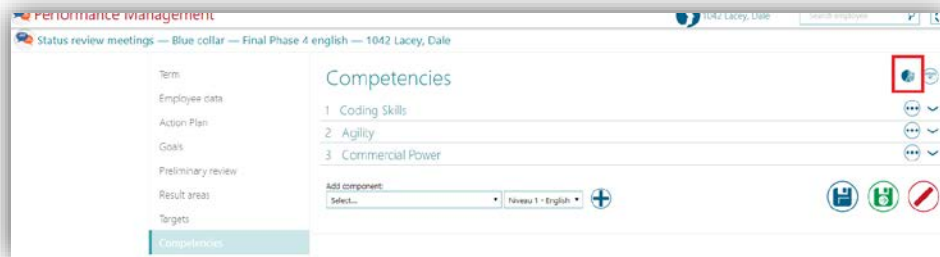
Feedback Detail Page - Implementing Standard and Extra questions/answers on feedback summary page at term level and at individual feedback level

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.
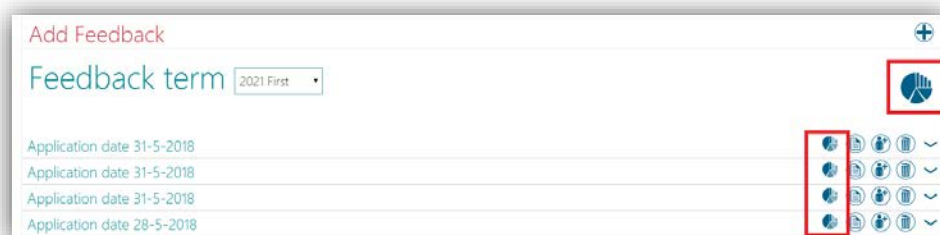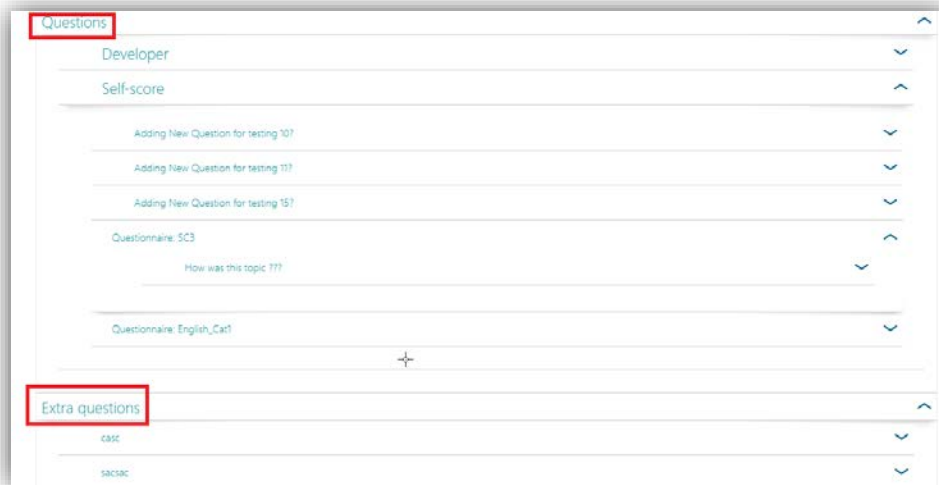
Modified and Improved

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

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.
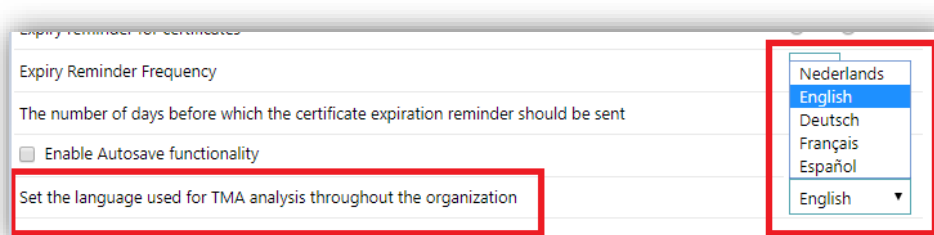
Modified and Improved

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

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:

```xml
<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

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

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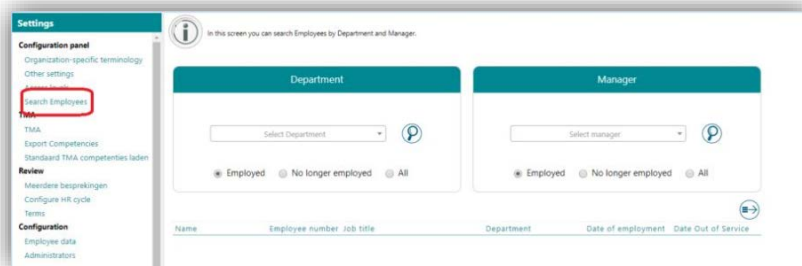
Select a department or employees of a specific manager and then select 'No longer employed' and click the Search option. All former employees will now be listed.

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

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

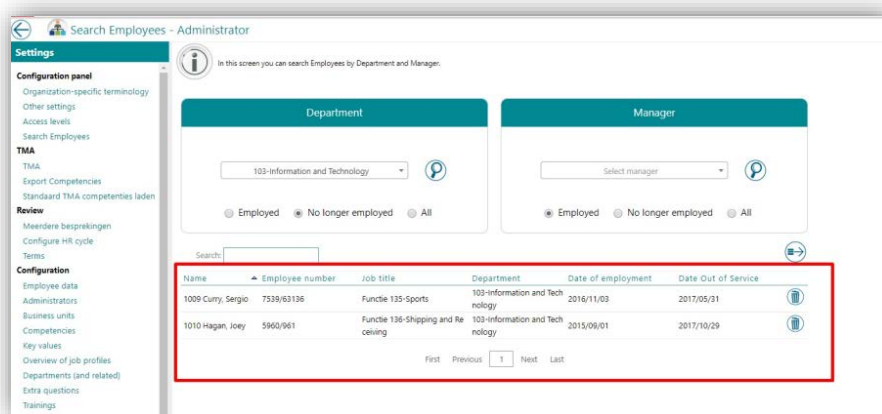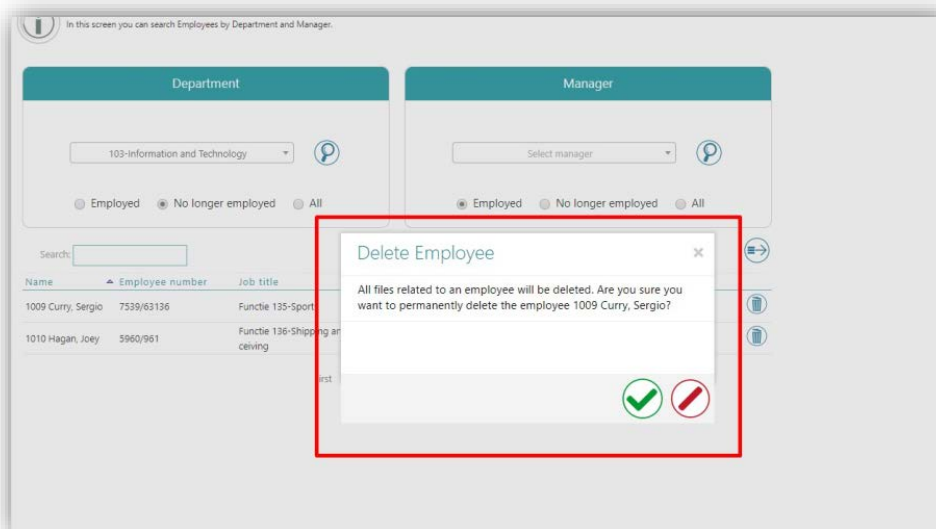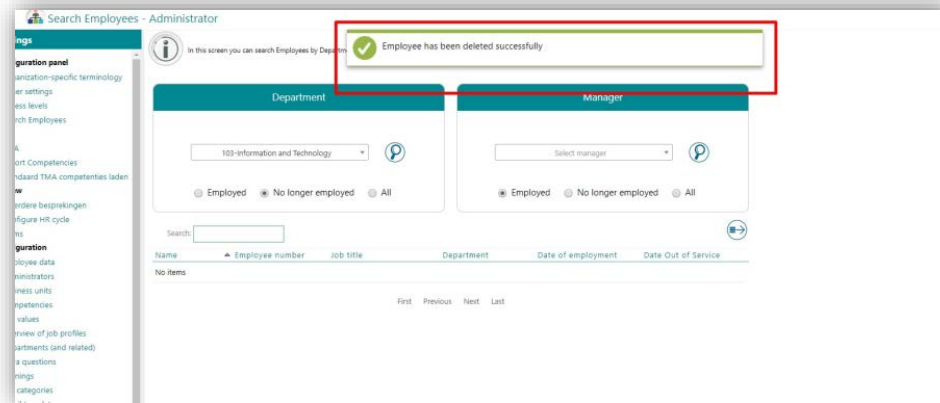Please note: This is a permanent deletion. Once the employee is deleted, all the information such as review files, TMA score, and any personal files specific to the employee will be deleted.

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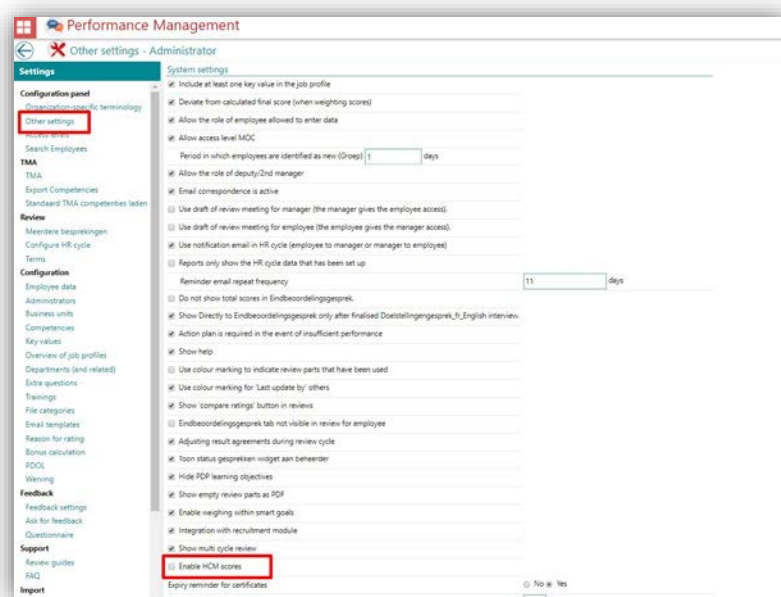
The above option is enabled by default. If the user doesn't want to see the HCM score, they need to uncheck this. Once the option is disabled, the 'overall summary' page HCM score section will not be shown.

Solved Messages

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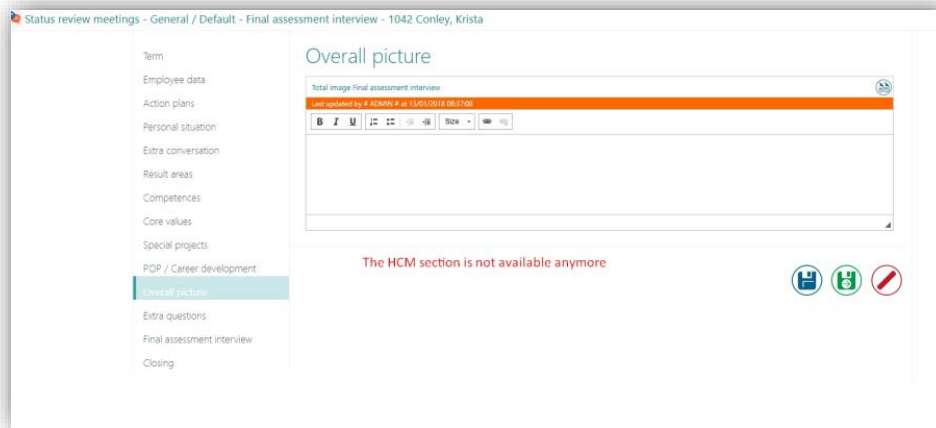
Message

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

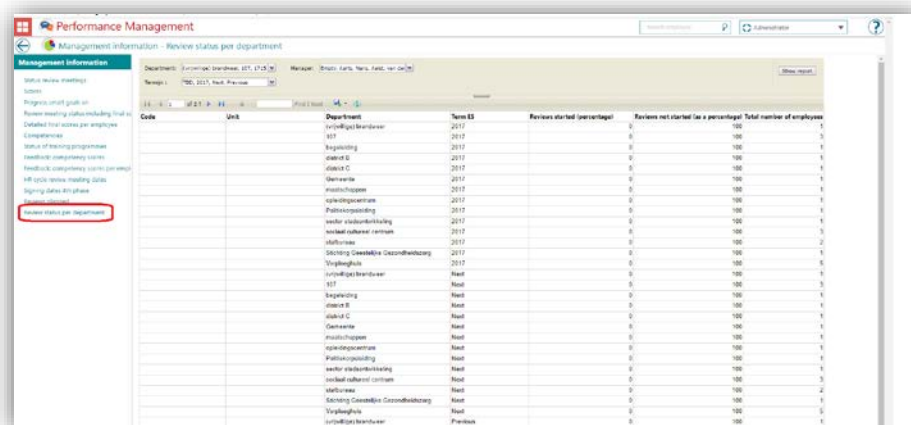Release 2018-02

Version 1.0

Contents

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.


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.
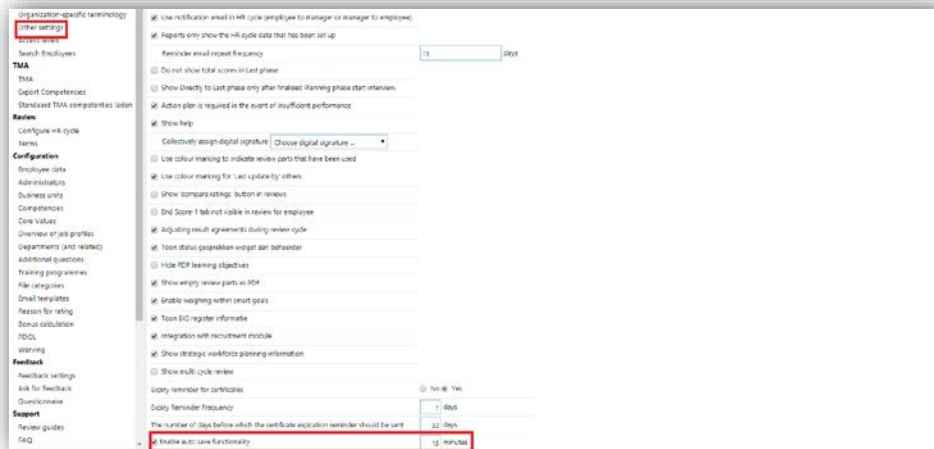
You need to enable the *Auto save* functionality on settings page.
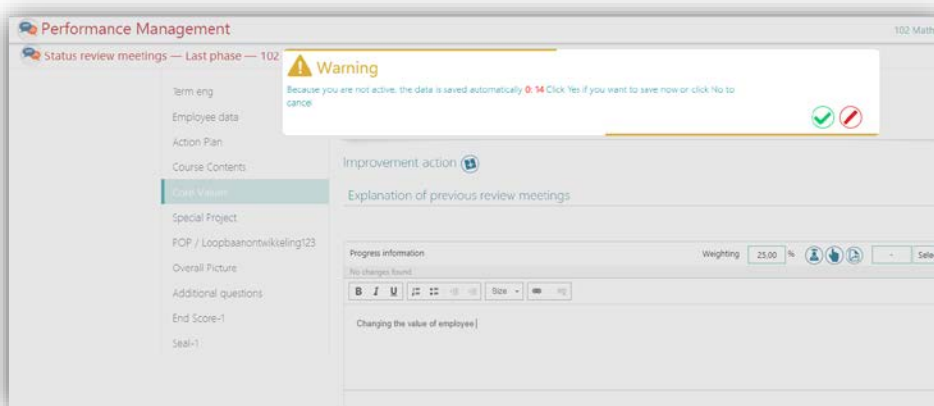
If a user is not active in entering data for 15 minutes, a pop up message will be shown asking for confirmation for saving the entered data.

Changed and Improved

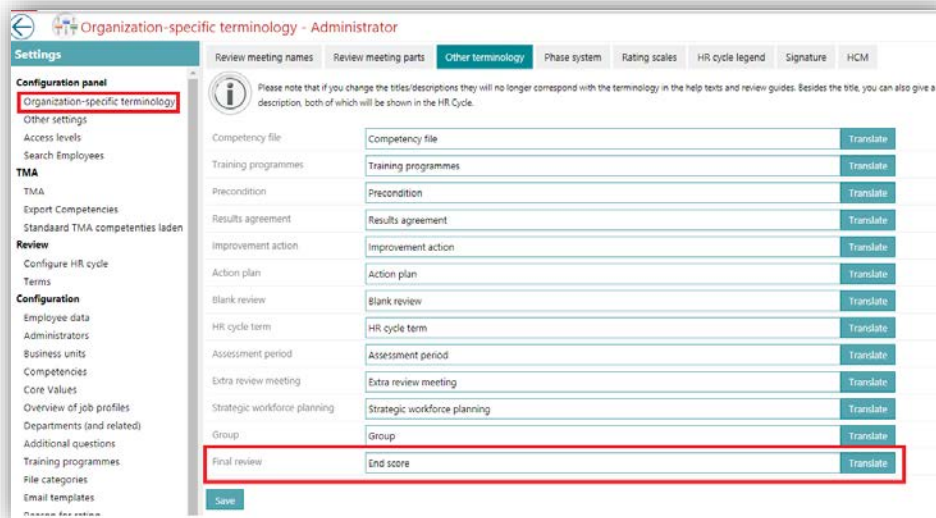## 3. Provide own terminology for End score header text

Why

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

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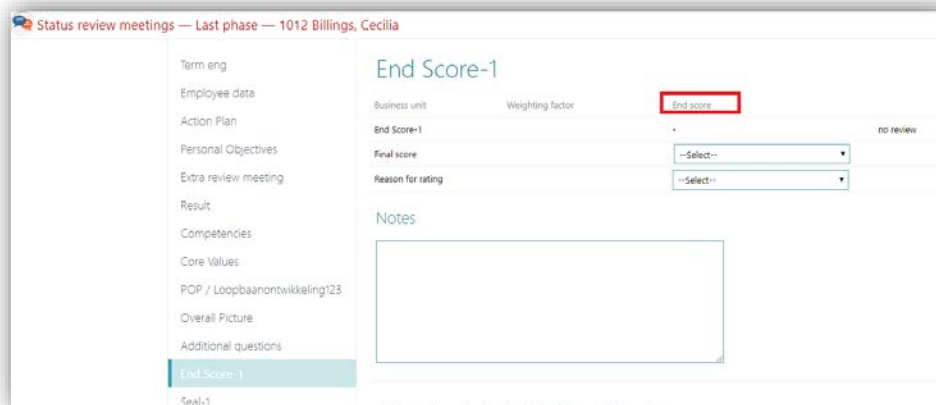
The term you have entered for *Final review* in your organization-specific terminology section is shown in the review tab.

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

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 function-ality 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*
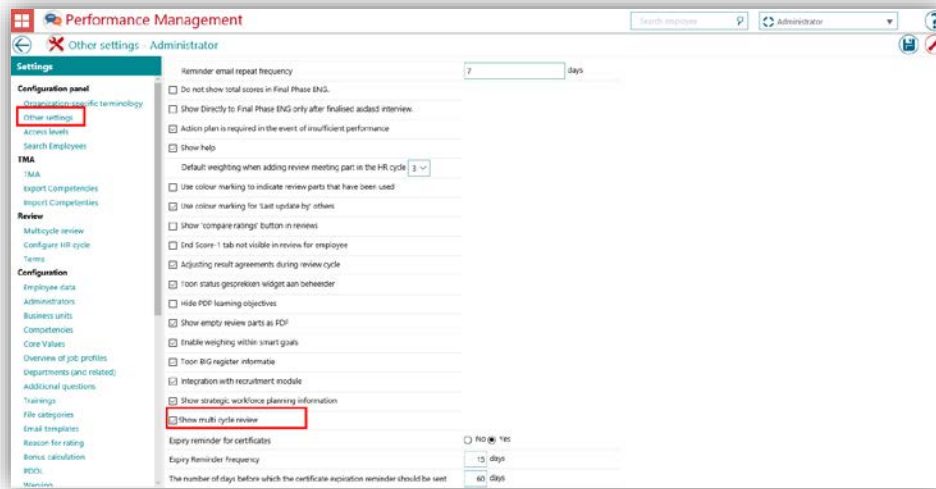
Setting-up the terminology

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*
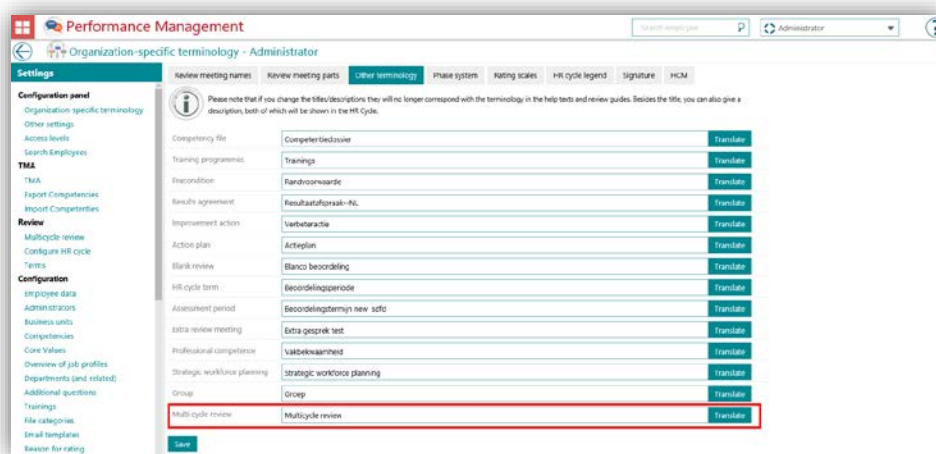
Configure the new cycles

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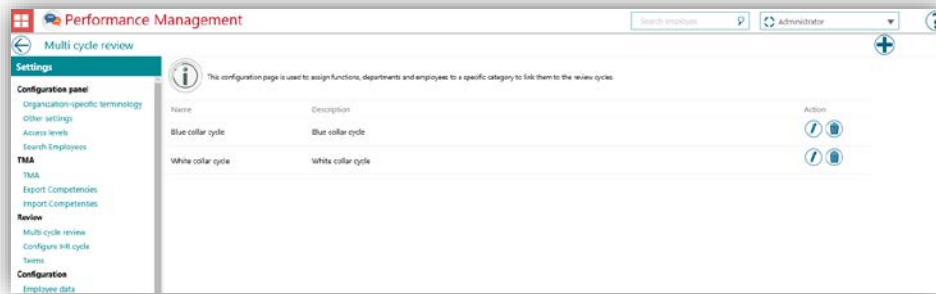
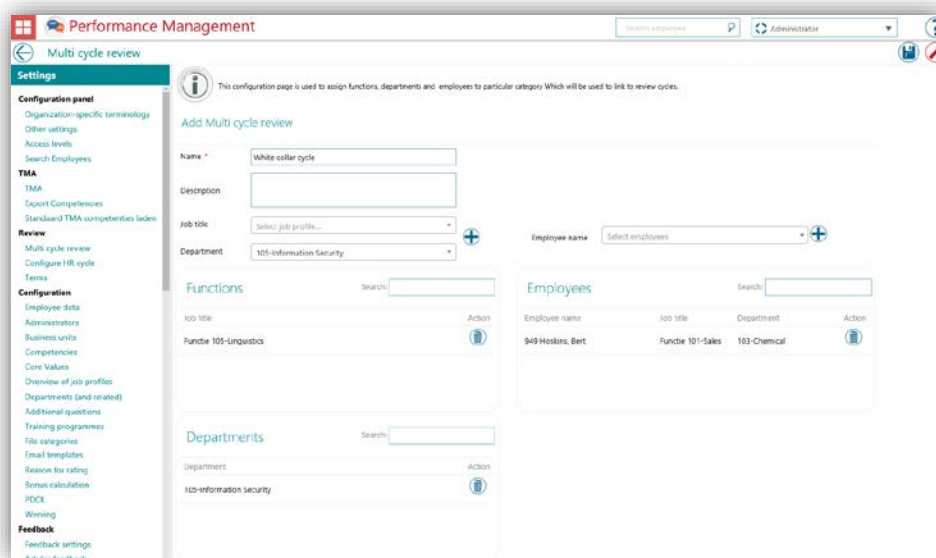When you create a new cycle you have to choose the Departments, Job Functions, or Employees whom will be evaluated on it.


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:
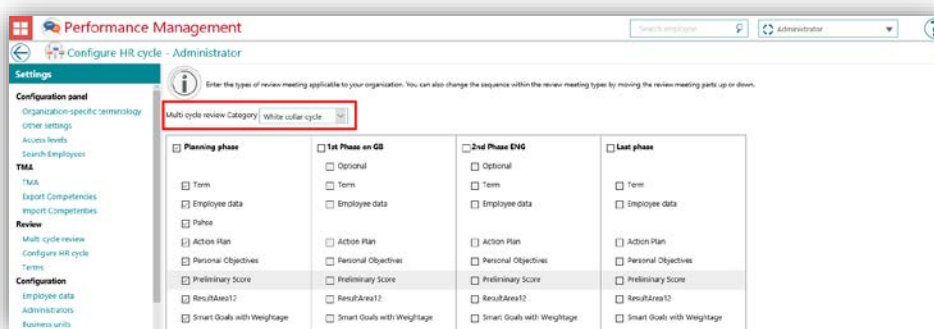
1. Cycle set up for the employee
2. Cycle set up for the job function
3. Cycle set up for the department

The multilingual translations can be added when editing the cycle.
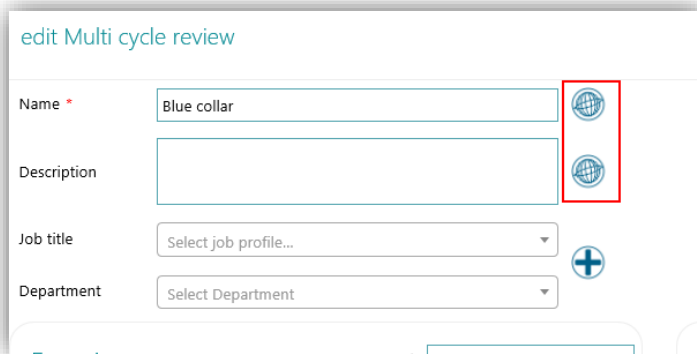
Setting-up the cycle phases

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

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.
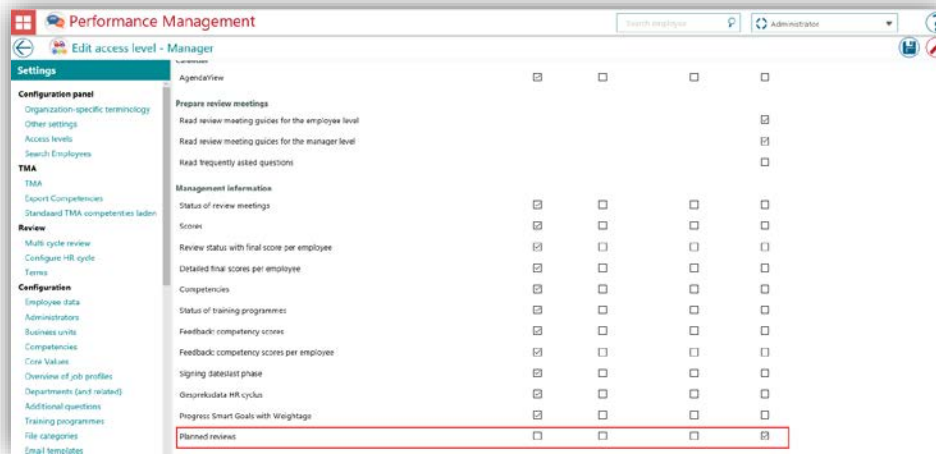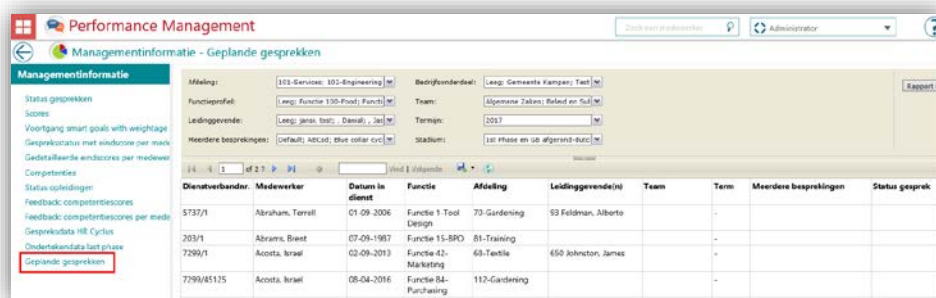

Checking the reviews progress

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*

2. Start the report: *Management information | Planned reviews*
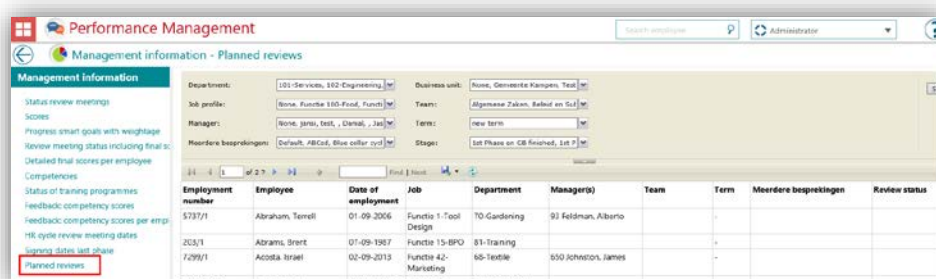
Many other reports have been updated to ensure that they are completely compatible with the Multi-cycle feature:

- 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.

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.