

Appraisals – An Admin guide

Appraisals are known as Performance Review forms (or PR Forms) in CompanyControls. The Performance Review Admin area can be found by going to *Admin > System Functionality > Performance Reviews OR My Details > Performance > Reviews > Admin*.

Two **Functionality Roles** are available to give controls to manage the administration of Performance Reviews for all users including Client Administrators:

Performance Review Admin – Access to My Details > Performance > Reviews > Admin

Performance Review Initiator – The option to issue a PR Form to an employee for completion

Initially there are a number of example PR Forms available. They are intended to be used as a guide to setup your own but they can be adapted and used for your own purposes or simply removed by going to Maintain > PR Forms > PR Form Ref in the Performance Review Admin section and clicking the Remove button.

How to create a new PR Form?

STEP 1:

Go to the Performance Review Admin area and Maintain > PR Forms and choose Add New. Choose the Type and give the new PR Form a name.

There are a number of types that are available which are:

- New Starter
- Leaving Reasons
- 360 Appraisal
- Performance Appraisals with Goals
- Performance Appraisals
- Performance Evaluation
- Performance Improvement
- Goal Setting
- Career Enhancement

The following 5 tick boxes (and follow-up PRFs) are used to specify where this PR Form would come in a pattern of PR Forms (even if its on its own).

It is possible to have PR Forms follow each other in a pattern. This is useful when you have specific first, second, third and subsequent appraisals, where the 2nd appraisal will have goals to review where as the first will not or a pair of appraisals where the first sets the goals and the 2nd is to review their completion. The following are examples of common patterns:

	One off	Start of chain	Requires Previous PRF	Follow-up PRFs	End of Chain	Repeatable Chain
One off	✓	✓			✓	
One off repeating	✓	✓		Itself	✓	✓
Second in line			✓			
Last in line			✓		✓	
Set goals		✓		Review Goals		
Review goals			✓		✓	

Other settings are available that control the creation of the next PR Form:

Auto Generate Next on Completion – When the user has completed their appraisal the next PR Form in the pattern will be issued automatically

Cancel Initial When Next Created – If the next PR Form is issued (manually) before the previous one has been completed, the previous PR Form will be cancelled. This resolves the problem of PR Pile-up!

Offer Create Next Link – This offers a Create Next link for the user against their completed PR Form. The user can issue themselves their next PR Form in the pattern.

Period to Next –The gap between this PR Form and the following one. This will automatically generate a date for the next review if one isn't specified.

Your Job Types can be associated with this particular PR Form. This does not limit this PR Form to the selected Job Types. This should be used to remind which PR Form is for which employee.

Click the Add Button

STEP 2:

Once the PR Form has been added, three more boxes appear. They are:

Performance Review Form Components – The area in which each element of the PR Form is added. This is the main part of the creation of the PR Form.

Edit Performance Review Form Follow-Up PRFs – This area will list the PR Forms that have been marked as *Requiring a Previous PRF*. This allows for more than one to follow another. If the follow on PR Form has not been created yet you can return to this area to add it once it has.

Performance Review Supporting Documents – Supporting documents can be added to a PR Form such as guidance notes, explanations and company policies. Documents should be added in Admin > Files > Files (dropdown) > Add and choose a File Class of Performance Review Support.

Step 3:

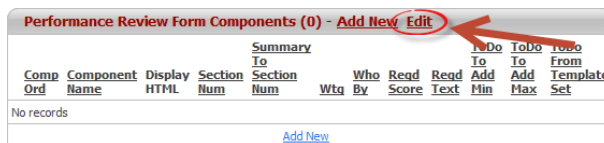
Adding the Performance Review Form Components

This is the most important part of the PR Form creation which determines the text and layout used from the employee's point of view.

IMPORTANT: A Component is a part of the PR Form such as a score summary, some text in a paragraph or most commonly a question and answer section. These are all examples of components that make up the PR Form as a whole.

It is advisable to take your current Appraisal, New starter form etc and consider where the components are by splitting your PR Form into these small parts.

A view of the components only for this new PR Form can be got by using the Edit link.



Comp Ord	Component Name	Display HTML	Section Num	Section Num	Who Wtd	Reqd By	Reqd Score	Reqd Text	ToDo To Min	ToDo To Max	ToDo From Template Set
No records											
Add New											

Alternatively Add New will open a form to add a new component to this new PR Form. The Component Only page also has an Add New link.

The new Component page (or Add/Edit Performance Review Form Component) has a number of choices available. They are:

Component Order	Required This determines the position of the component within the others already added. It is best to increase in multiples of 10 to allow for movement and new components between others.
Component Name	This is the name given to this component. It allows for the data to be easily referred to especially when it has been exported.
Component Action	This determines the type of component to be added. There are a number available but they fall into the following categories: Score summary, Text only, Questions & answers and tasks
Section Num	This is used to refer to this Component from another component. For instance: <ul style="list-style-type: none"> When this component Action is a 'Total/section Summary Results' putting a value in here will allow scored questions to be summed back to here by using the Section Summary To Section Num When this component Action is a 'Non Editable Copy of previous Comments for matching section code' putting a value in here of a previously named comment will repeat any text added to that comment section When this component Action is a 'ToDo Review' putting a value in here of a previous ToDo - Set Goals or ToDo - Development Plan will bring any previously raised ToDos into the current Performance Review
Section Is Score Shown	For some Component Actions where a score is available. This option allows you to show or hide that score from the person completing the PR Form
Section Summary To section Num	This is used by a scored Component Action to collect the score and sum it along with any other scores to a Section Num. For instance when the Section Num is 'Personal Dev', all Section Summary To Section Num with 'Personal Dev' will be summed to the Section Num (See figure below)
Weighting	This changes the overall importance of the score compared to the others scores in the same section. If the weighting is unspecified then the weighting is in effect 1. If there are 5 questions in that section and one component is given a weighting of 4, it will be as valuable as the other questions together.

	This can be used to offer the same PR Form to all staff but the relative importance of each section could be adjusted to play to each job type.
Section Is Wtq Shown	The weighting (importance) of each question can be brought to the employees attention or not
Who By	All components can be marked as needing to be completed by a particular employee. For Summary and Just show text components a <i>Text Only</i> option can be chosen. For all other components the following can determine who can and who cannot complete the question: <ul style="list-style-type: none"> • Employee • Reviewer • Manager • Either/All • PR/HR Admin
Required Score/Mark	Some components are made up of a scored radio button area and a comment area. This makes the scored/comment area a required area to be completed. It does not however make it mandatory to be completed and the PR Form can be finished without its completion. It should be used as a guide only.
Required Text/Comment	
Display Text	This is where the text of a 'Just Show Text' or the question before a 'Comment Capture' is added. The format of the text can be adjusted by using tags in a similar way to HTML. At present the following tags are used: <p>#h1# (big heading), #h2# (medium heading),#p# (paragraph),#b# (bold),#u# (underline),#i# (italic)</p> <p>These are used at the beginning and end of the words you wish to format, except the tag at the end should include a forward slash – e.g. #h1#Big heading#/h1#</p> <p>#ol#,#ul#,#li#</p> <p>These allow for 2 types of bullet (number and circle). The #ol# allows for a numbered bullet and #ul# a circle bullet. This is achieved in the following way:</p> <p>#ul#</p> <p>#li#First bullet#/li#</p> <p>#li#Second bullet#/li#</p> <p>#li#Third bullet#/li#</p> <p>#/ul#</p> <p>A #br# makes a single line break of one line. Two can be used together to ensure a gap of one line between to paragraphs of text. A #br# does not need an end tag.</p>
Display HTML	This area gives a preview of the Display Text.
Alt Measure Array Values	For a Component Action that has 'Manually Set Values/Measures' in its title means that the score and wording of the answers should be specified. The format to do this is: Score;Display Text;Score;Display Text;Score;Display Text OR 4;BRILLIANT;3;GOOD;2;AVERAGE;1;STUGGLING;0;INCAPABLE
ToDo To Add Min	When the Component Action is either ToDo – Set Goals or Todo – Set Development Plan these 2 fields allow for the number of total lines of each to be specified as the Maximum to be allowed. The Minimum specifies the number of lines that are <i>required</i> to be completed by the employee. Therefore Min=2, Max=4 will create a line of 4 empty ToDos for Goals or Dev Plans where 2 will be marked as required.
ToDo To Add Max	
ToDo from Template Set	When the Component Action is ToDo – Preset Actions/ToDo's a preset pack of ToDo's can be chosen here. When the PR Form is issued to the employee, the preset pack of tasks are automatically raised and issued in relation to the person who has been issued the PR Form. This is particularly useful for New Starter Forms and Leaver Questionnaires. See below to find out how to create a ToDo Template.
Live	Used to remove a form component

Figure : Section Summary to Section Num

Comp Ord	Component Name	Component Action	Section Num	Score Shown	Summary To Section Num	Wtg	Who Shown	Who By	Req Score	Req Text	Display HTML
Detail	1	Total/Section Summary Results	TOTAL	Show Score		---					Annual Performance Appraisal TOTAL SCORE
Detail	40	Personal Attributes	PA	Show Score	TOTAL	1					Personal Attributes
Detail	41	Quality Horiz 5-1-N/A (as -3) Inc Words Measure After Client Text + Postline Comment (80x5)	PA_01		PA	1		R	Req Score		Quality Completes high quality work according to specifications. Thoroughly follows standards and procedures. Keeps complete records. Pays attention to details. Has a strong sense of quality and knows how to achieve it.
Detail	42	Desire to Improve Quality Horiz 5-1-N/A (as -3) Inc Words Measure After Client Text + Postline Comment (80x5)	PA_02		PA	1		R	Req Score		Desire to Improve Quality Continually looks for ways to improve and promote quality. Applies feedback to improve performance.
Detail	43	Desire to Improve Quality Horiz 5-1-N/A (as -3) Inc Words Measure After Client Text + Postline Comment (80x5)	PA_03		PA	1		R	Req Score		Job Knowledge Possesses skills and knowledge to perform the job competently.

A Copy button is available to make multiple copies of one completed component to help speed up the form creation process.

Step 4:

Test your New PR Form

Issue your form to yourself and others to check it reads and works as you expected. To do this go to the PR Admin section and Add. Select the new PR Form Ref from the dropdown list and the For will already be set as you. You could also set the Primary Reviewer (normally defaults to the manager position if not set) to someone who is prepared to test it with you.

No other field is needed to be changed at this stage.

Step 5:

Locking your New PR Form

Changes to layout, text and answers etc can be made to the new form by going to My Details > Performance > Reviews > Admin > Maintain > PR Forms and select the PR Form Ref. Clicking [Detail](#) next to the Component will open it to be edited.

IMPORTANT: WHEN THE PR FORM IS COMPLETE AND READY TO BE ISSUED TO YOUR EMPLOYEES IT MUST BE LOCKED FROM FURTHER CHANGE. THIS WILL PREVENT ANY EDITS TO THE PERFORMANCE REVIEW FORM COMPONENTS WHICH WOULD CONFUSE THE ANSWERS THAT HAVE ALREADY BEEN PROVIDED.

Add/Edit Performance Review Form - Back to List	
PR Form Ref	PRF1014
Perf Rev Type	Perf Appraisal with Goals
PR Form	Directors Managers
Locked From Further Change	<input checked="" type="checkbox"/> Disables further changes to the PR Master to FIX the text/questions/options for PR's using this Master (i.e. when setup testing is complete)
Notes	

Your New PR Form is now ready to be issued and completed.

How to change a locked PR Form?

If you feel that a change is required of a locked PR Form the COPY button on the main PR Edit page can be used to make an exact copy of the locked PR Form with the exception that it will be unlocked and editable.

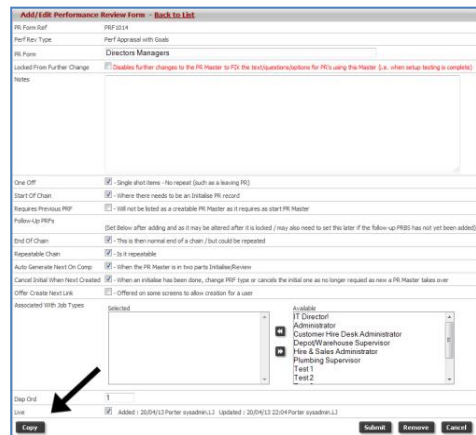
When the changes to the new replacement PR Form have been made the old PR form can be discontinued by making it unlive and the new PR Form will take its place.

How to issue a PR form to an employee?

A PR Form can be issued to an employee directly from the PR Admin area > Add to open the PR Form issuing page.

The PR Form Ref dropdown includes all your PR Forms that are live and marked as the start of the PR Form pattern.

Choose the person to receive this PR Form. The Primary Reviewer will normally be the manager if no one is selected however in the case of a 360 Appraisal it would be the person's colleague.



The Review as of date specifies when the review should be completed by. On completion of this form an email is sent to the employee and review to complete the PR Form which includes a link to the form. The PR Form is also available in their My Details pages.

The period information can be used to capture what period of time this particular appraisal is reviewing. This is useful to select a number of appraisals from the same period especially in the XLS export of the appraisal data.

How to add ToDo Template or preset pack of tasks?

ToDo Templates can be very powerful to relay information to a number of people or simply to breakdown a complex project into a number of smaller, manageable tasks, even if they are for the same person.

The most common PR Forms where a ToDo template would be of use are the New Starter Forms and the Leaver Questionnaire. The New Starter Form would be comprised mainly of the management of those induction tasks for the new employee and the rest of the company where as the Leaver questionnaire could include a footnote of the equipment to be returned – for which the tasks would follow.

Admin > System Functionality > Performance Reviews > Maintain > ToDo Templates.

Two Templates have been added as examples.

To create a ToDo template click Add New and give it a name and click Add. Open the ToDo template by clicking the ToDo Template Ref.

Select Add New in **ToDo Template – Linked Todos**. Scroll to the bottom of the page to find a new Add/Edit box. This will create the task information. The Description and Detail can use #FOR_NAME# to replace the name of the person that has been issued the PR Form.

Once the tasks have been added, click Add new in ToDo template Matrix. The Add/Edit box will open below the Add New Link. Select one of the previously added tasks and then choose who would issue it as the originator. This would be the person who will want this task to be completed, may need to have Originator signoff and will receive emails regarding the task. The Originator Type and For Type will change who can be selected in Originator Name and For Name. See below for more information. This allows for more than one person to receive the same task.

Types	Description
Calc User	The person who the PR Form has been issued to (<i>The Person</i>)
Calc users Manager	The Manager of <i>The Person</i>
Calc users H Group	The Home Group of <i>The Person</i>
Calc users H Group Parent	The Group above the Home group of <i>The Person</i>
User	Select from a list of everyone in People (All your staff members)
Group	Select from a list of your departments in Groups
Area	Select from a list of your Areas
Company Role	Select by the Company Role (Freehand labels for individuals)
Functionality Role	Select by the Functionality Role (Admin Access in a Module)
Site Role	Select by the Site Role (User, Management, Client Admin)

Finally the timescales of the task should be set. The Offset Days Start and End allow for Required Start and Required Completion dates to be set on the ToDo based on the date that the PR Form was issued to the employee.

Once the ToDo Template has been setup it must be added to a PR Form. Choose a Component Action of ToDo – Preset Actions / ToDo's and select the new ToDo Template for the 'ToDo From Template Set' at the bottom of the PR Form Component Edit page.

Performance Review Form Components (9) - Add New Edit

Comp Ord	Component Name	Display HTML	Summary To Section	ToDo To Read	ToDo To Add	ToDo From Template
Detail	1 Onboarding Instructions	Instructions Ensure that each applicable task has been reviewed to update on your dashboard as open tasks until the PR will not accept the form as complete until all tasks you until it is done!	ToDo To Add Max ToDo From Template Set Live		TDT1000 - New Starter - Emp Set	Added : 05/11/12 System Updated : 05/11/12 17:55 System
Detail	2 Header - Emp	New Employee Tasks				
Detail	3 ToDo - Emp	Tasks	EMP.ToDo	E		TDT1000 - New Starter - Emp Set
Detail	4 CompletedTasks	EmployeeTasks Status	EMP.Comp	E	Yes	

How to Export the data?

The data from all your PR Forms can be exported to XLS. The export process will export one PR Form at a time and this can be further filtered by Group, Area, User and issue dates.

The Export itself is divided into 4 tabs:

Header	PR Form Name, Notes & pattern
Components	PR Components
Summary	Summary line per individual
Individual Responses	Detailed responses per Component per individual

How to see all PR Forms issued across the whole company?

Admin > System Functionality > Performance Reviews > People – List

This shows all the currently Open PR Forms that have been issued throughout the business. The search area at the top allows for specific PR Forms and employees to be found.