

Simply Personnel Performance Profile Management

Setting Up Guide

Simply Personnel: Performance Profile Management.

This document provides step-by-step guide for users to give an easy understanding on setting up the performance profiles in your self service system.

If at any time you need help or just need some questions answered please use our on-line helpdesk at www.simplypersonnel.co.uk where you will find comprehensive articles and an option to open a support ticket.

Thank you

The Simply Personnel Team.

To set up your performance profiles you need to access the system setup and then go to the personnel tab:

Performance Profile Management

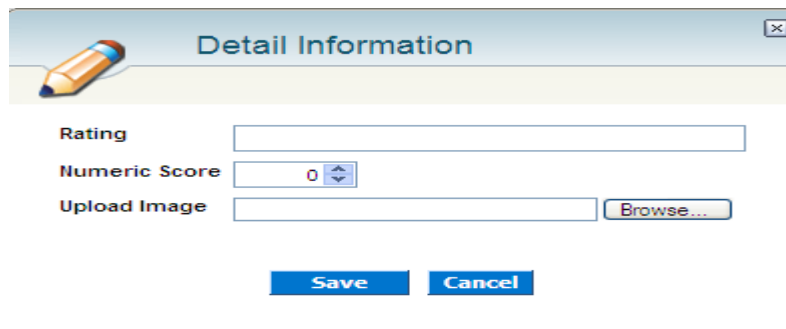
Performance Profile Management

- [Manage Ratings](#) Define the ratings to be used in performance management module.
- [Manage Priorities](#) Define the priority values to be used in performance management module.
- [Manage Performance Profiles](#) Define the profiles to be used in performance management module.

Manage Rating:

The Manage Ratings option allows you to configure how each section of the performance profile will be rated, e.g. Poor, Below Average, Average, Good, Excellent, etc.

To add a new rating, click on Manage Ratings and then the **Add New Rating** button. You will see the screen below.



Enter the rating the employee will see on the screen (e.g. "Good") and then a numeric score. The numeric score is used to order the ratings on the screen. For example, if you enter the ratings below they will appear on the profile as shown in the following table.

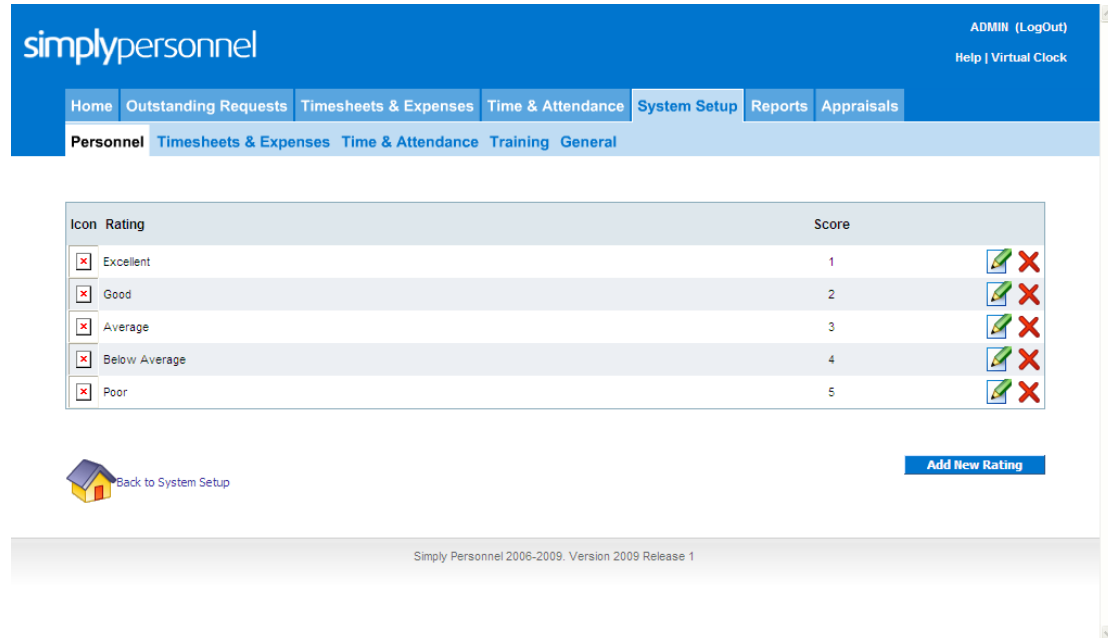
Ratings:

Poor	1
Below Average	2
Average	3
Good	4
Excellent	5

Profile Columns:

Poor	Below Average	Average	Good	Excellent
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Click on the Save button to save the rating. When finished you should have a table similar to the one below. Click on the pencil and paper icon to update the rating or click on the red cross to delete it.



The screenshot shows the 'System Setup' page in the simplypersonnel software. The navigation menu includes Home, Outstanding Requests, Timesheets & Expenses, Time & Attendance, System Setup (selected), Reports, and Appraisals. Below the menu, there are sub-links for Personnel, Timesheets & Expenses, Time & Attendance, Training, and General. The main content area displays a table with the following data:

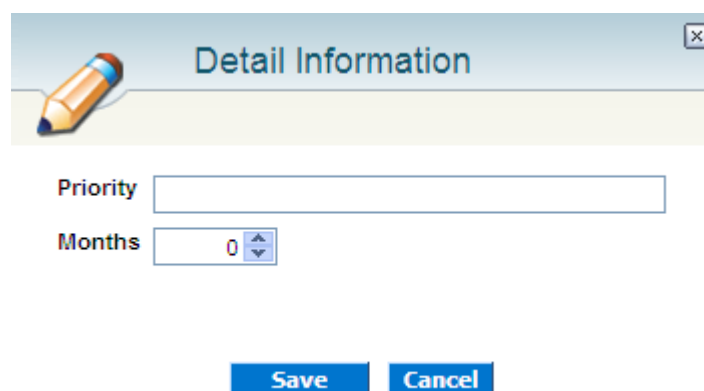
Icon	Rating	Score	
	Excellent	1	
	Good	2	
	Average	3	
	Below Average	4	
	Poor	5	

At the bottom of the table area, there is a 'Back to System Setup' button with a house icon and an 'Add New Rating' button. The footer of the page reads 'Simply Personnel 2006-2009. Version 2009 Release 1'.

Manage Priorities:

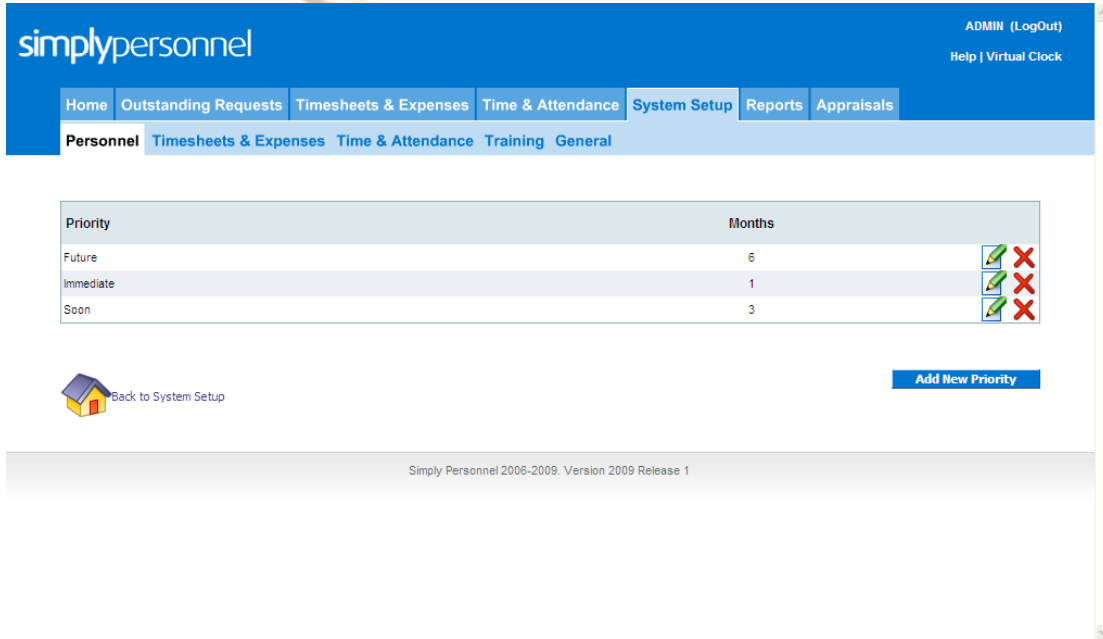
The Manage Priorities option allows you to enter timescales against the objectives defined in the performance profile, e.g. short, mid and long term objectives to be met within 3, 6, or 12 months.

To add a new priority, click on Manage Ratings and then the **Add New Priority** button. You will see the screen below.









The screenshot shows a 'Detail Information' dialog box with a pencil icon. It contains two input fields: 'Priority' (a text box) and 'Months' (a spinner box with the value '0'). At the bottom of the dialog are 'Save' and 'Cancel' buttons.

Enter the description of the priority and the number of months for it. Click on Save and repeat this for any other priorities you may wish to add. When finished you should have a table similar to the one below. Click on the pencil and paper icon to update the priority or click on the red cross to delete it.



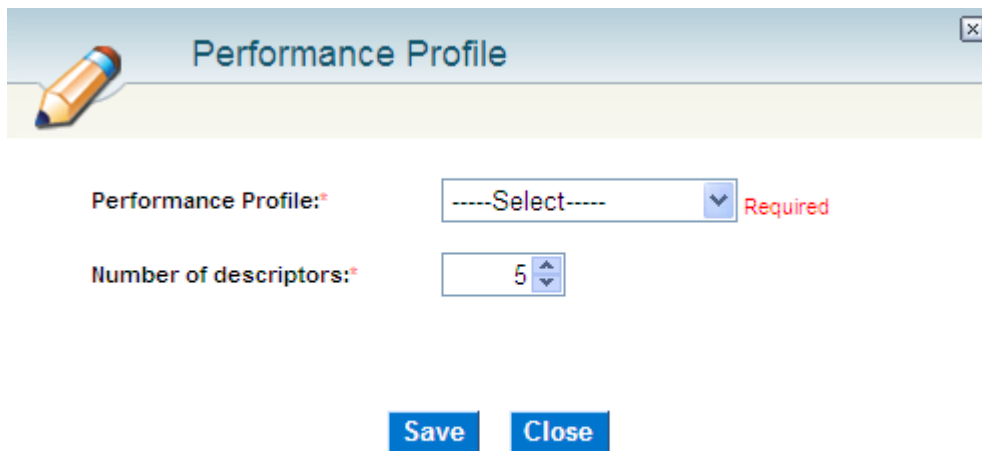
The screenshot shows the 'simplypersonnel' web application interface. At the top right, there are links for 'ADMIN (LogOut)', 'Help | Virtual Clock', and 'Virtual Clock'. A navigation menu includes 'Home', 'Outstanding Requests', 'Timesheets & Expenses', 'Time & Attendance', 'System Setup', 'Reports', and 'Appraisals'. Below this, a sub-menu shows 'Personnel', 'Timesheets & Expenses', 'Time & Attendance', 'Training', and 'General'. The main content area features a table with the following data:

Priority	Months	
Future	6	 
Immediate	1	 
Soon	3	 

Below the table, there is a 'Back to System Setup' button with a house icon and an 'Add New Priority' button. At the bottom of the page, it says 'Simply Personnel 2006-2009. Version 2009 Release 1'.

Manage Performance Profiles:

To create a new performance management profile click on the option then New Performance Profile button.



The screenshot shows a 'Performance Profile' form window. It contains the following fields:

- Performance Profile:** A dropdown menu with the text '----Select----' and a 'Required' label.
- Number of descriptors:** A text input field containing the number '5' and a small up/down arrow icon.

At the bottom of the form, there are two buttons: 'Save' and 'Close'.

The list of profiles that can be created are linked to the posts that have been set up within Simply Personnel. Select the post from the drop down list and enter the number of descriptors. This should be the same as the number of ratings that have been created earlier as the descriptors are the number of columns available on the profile.

You will only be able to assign the performance profile to an employee that has been set to the selected post on their current job record.

Once done, click on the Save button. New screen will appear with two sections for you to complete.

Section A

In Section A you create the form that the manager or employee has to complete online. The instructions to complete the form are given above the grid. Enter the description of the segment in the first column and the selectable criteria in the others. Add just a description to create a header for a new section. You can also add or remove rows as needed.

SECTION A PERFORMANCE RATING - Accountant

- Click on the + image to add new line
- Click on the X image to remove current line being edited
- Click on the cell to edit the contents
- To record a segment enter data in only the first cell under Descriptors/Criteria column



DESCRIPTORS ▶ CRITERIA ▼	Excellent	Good	Average	Below Average	Poor

You should end up with something like the grid below.

SECTION A PERFORMANCE RATING - Sales Director

- Click on the + image to add new line
- Click on the X image to remove current line being edited
- Click on the cell to edit the contents
- To record a segment enter data in only the first cell under Descriptors/Criteria column

+ X

DESCRIPTORS ▶ CRITERIA ▼	Excellent	Good	Average	Below Average	Poor
Management Skills					
Leadership & Motivation	A role model	Very effective	Good	Inadequate ability	Difficult to motivate
Team Relations	Promotes strong teams	Very supportive	Generally keen	Limited	Poor
Organisational Skills					
Time Management	Extremely effective	Systematic and logical	Organises self well	Finds difficulty in organising self	Unable to plan
Planning and achieving results	Sets themselves high standards	Very well organised	Only focuses on the current project	Needs to have the next project planned	Needs to be pushed

Section D

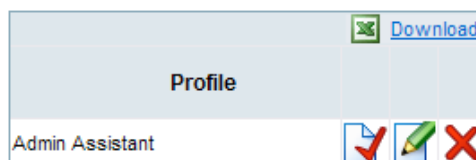
The labels in Section D are used when entering an actual appraisal against the employee. There are a group of text boxes for additional comments and these labels will be used to indicate to the employee or manager what needs to be entered.

SECTION D : REVIEW RECORD

Label 1	<input type="text" value="Additional Reviewer Comments"/>
Label 2	<input type="text" value="Employee Comments"/>
Label 3	<input type="text" value="What needs to be done before the next review is scheduled?"/>

Saving the Profile

Click on the Save button when you have finished creating the profile. The profile will be added to the list of any existing profiles.



Click on the red tick to change the number of descriptors, the red cross to delete the profile or the green pencil to edit the template.