



ePerformance Overview

November 3, 2006





Agenda

- About Drivestream

- ePerformance Overview
- Upfront Decisions
- How To
 - Documents
 - Templates

- Wrap-up and questions

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About Drivestream





About Drivestream

Drivestream is a business and technology solutions firm and a tier-one PeopleSoft vendor. The best way to define ourselves is based on how our customers view us:

Working with the “Body Shoppers”		Working with the “Big Guys”
No Method	Proven Method	200 Step Method
Search Monster/Dice	Right People - Right Time	1 Sr. Guy – you train the rest
Who Knows?	Collaborative Work Style	“Our Way”
Drop them off at the doorstep	Integrate w/ your team	Replace Your Team
Body Oriented	Results Oriented	Partner Oriented
Hourly Rate	Share the Risk	1 Million Dollar Deals
Driven to be Extended	Speed	Over-engineered

We can help you assess the feasibility of ePerformance for your organization and help you implement it!

ePerformance Overview

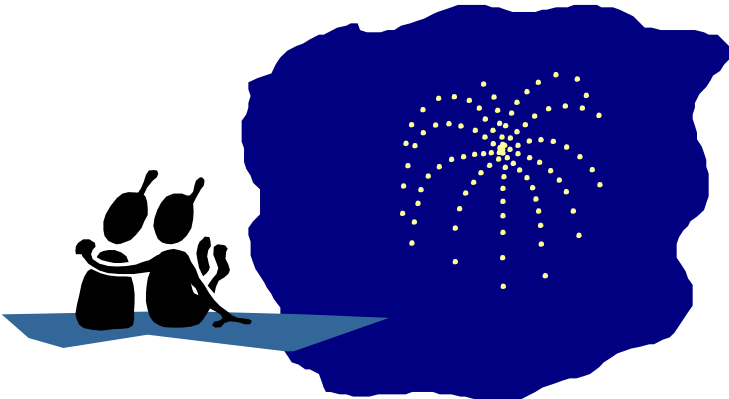
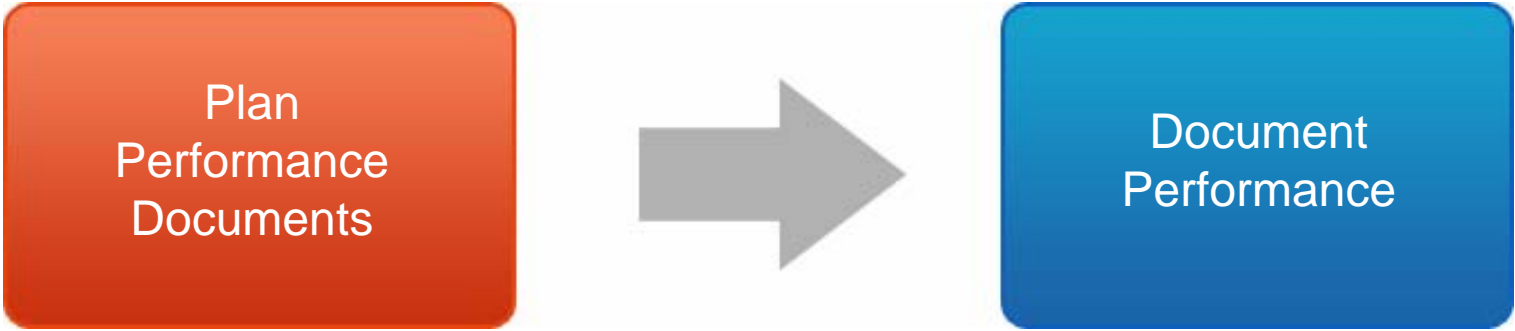


Going The Distance

- Involves employees in improving and accomplishing your Company's goals
- Entails Planning, Monitoring, Developing, Rating and Rewarding
- Sets Expectations



ePerformance Overview



ePerformance: How To



ePerformance – Plan Performance Documents Overview



Plan Performance Documents – Templates

The Organization can design every aspect of the document(s):

Mission
Statements

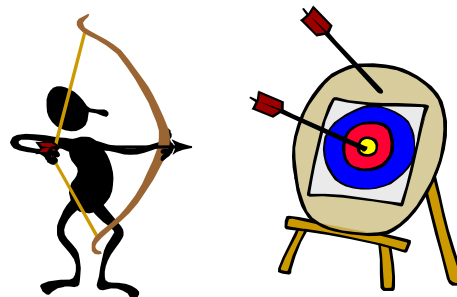
Do I want this in the document?
Would I prefer a Vision rather than a mission statement?

Goals or
Objectives

Do I want this in the document?
Do I want these rated or weighted or is feedback my priority?

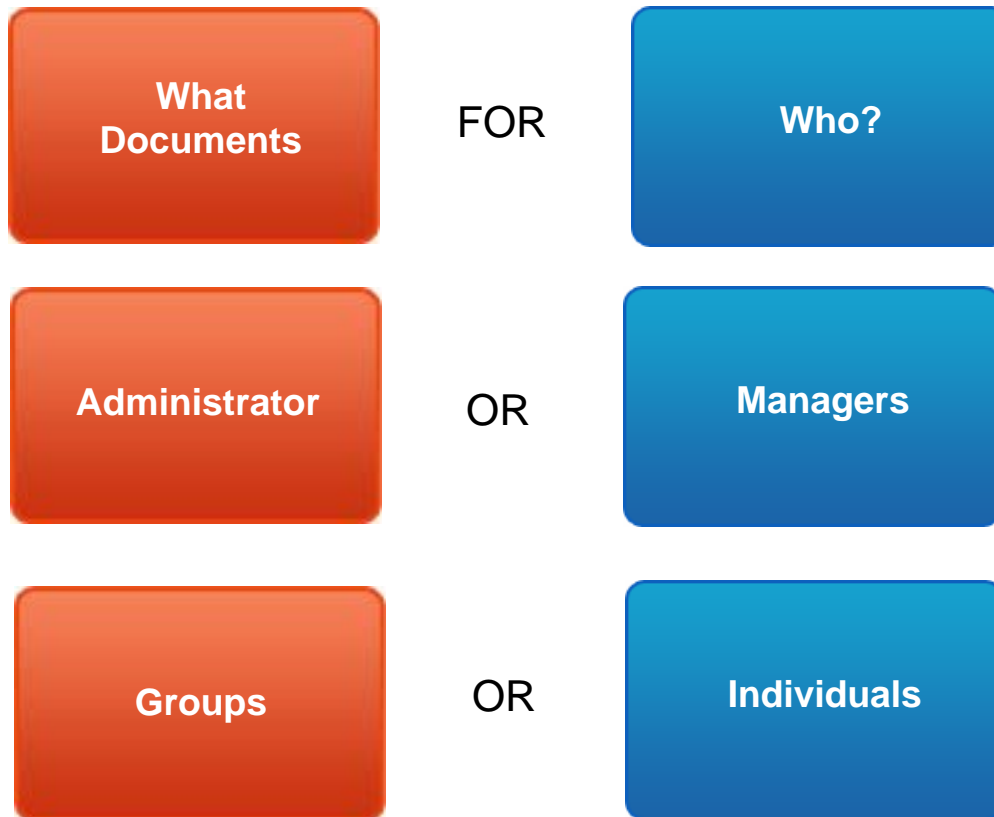
Comments

Do I want comments available in every section or only certain parts of the document?

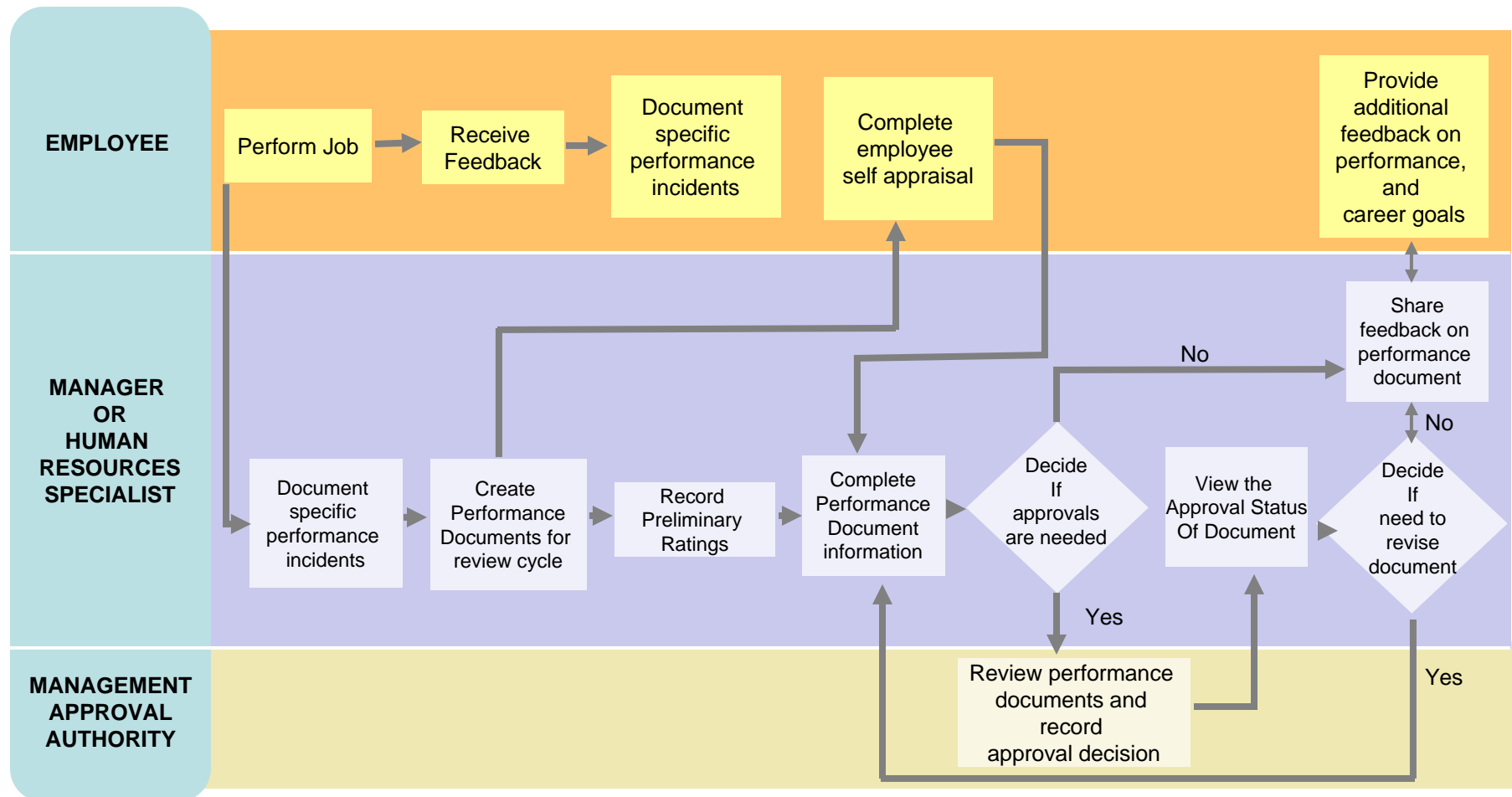


Designing and Managing the System

While designing the document templates you need to decide:

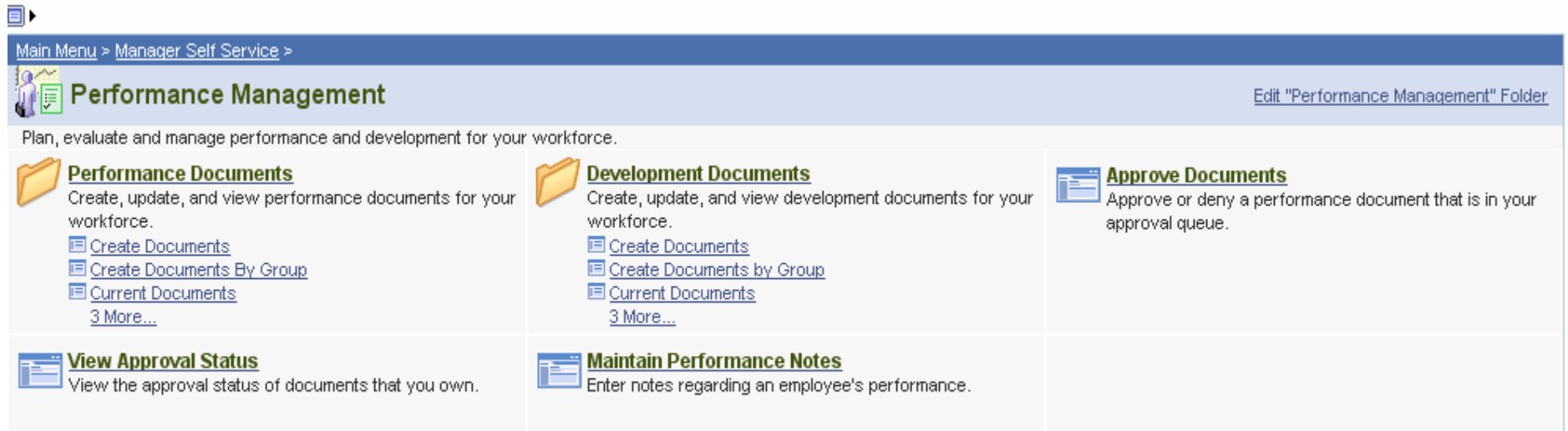


ePerformance –Document Performance Overview



Manager Navigation

- Intuitive navigation for occasional users
- This is the Manager home page

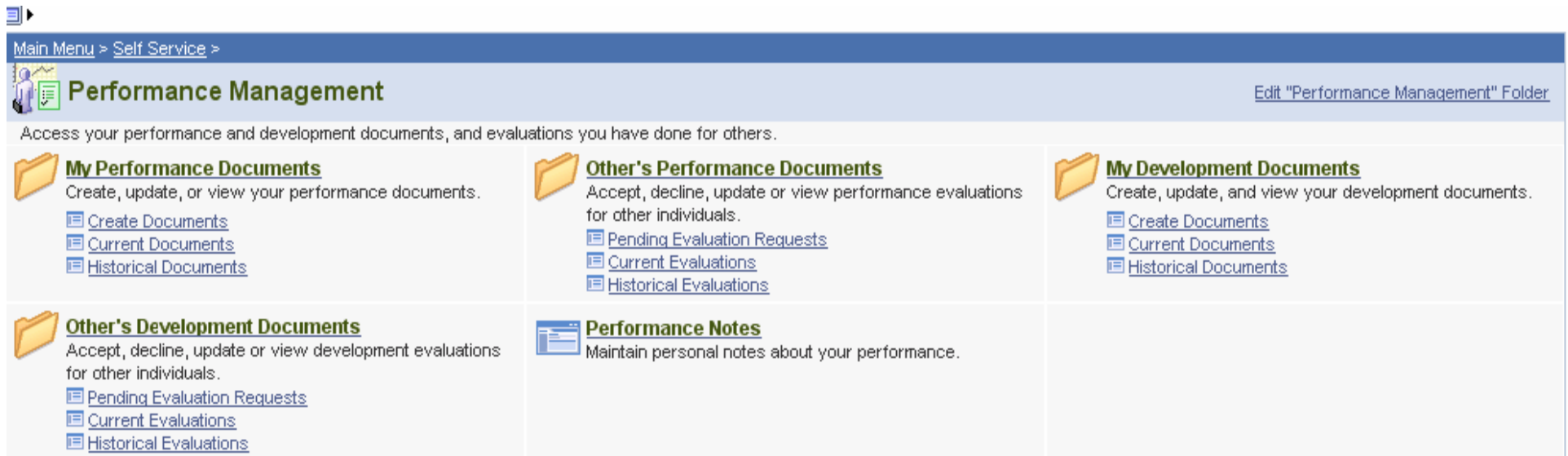


The screenshot shows the 'Performance Management' section of the Manager Self Service interface. At the top, there is a breadcrumb trail: 'Main Menu > Manager Self Service >'. The main heading is 'Performance Management' with a sub-link 'Edit "Performance Management" Folder'. Below the heading is a descriptive sentence: 'Plan, evaluate and manage performance and development for your workforce.' The page is organized into a grid of six tiles:

- Performance Documents** (Folder icon): Create, update, and view performance documents for your workforce. Includes links: [Create Documents](#), [Create Documents By Group](#), [Current Documents](#), and [3 More...](#)
- Development Documents** (Folder icon): Create, update, and view development documents for your workforce. Includes links: [Create Documents](#), [Create Documents by Group](#), [Current Documents](#), and [3 More...](#)
- Approve Documents** (Document icon): Approve or deny a performance document that is in your approval queue.
- View Approval Status** (Document icon): View the approval status of documents that you own.
- Maintain Performance Notes** (Document icon): Enter notes regarding an employee's performance.
- An empty tile is present in the bottom right corner of the grid.

Employee Navigation

- Intuitive navigation for occasional users
- This is the Employee home page








Main Menu > Self Service >

Performance Management

[Edit "Performance Management" Folder](#)

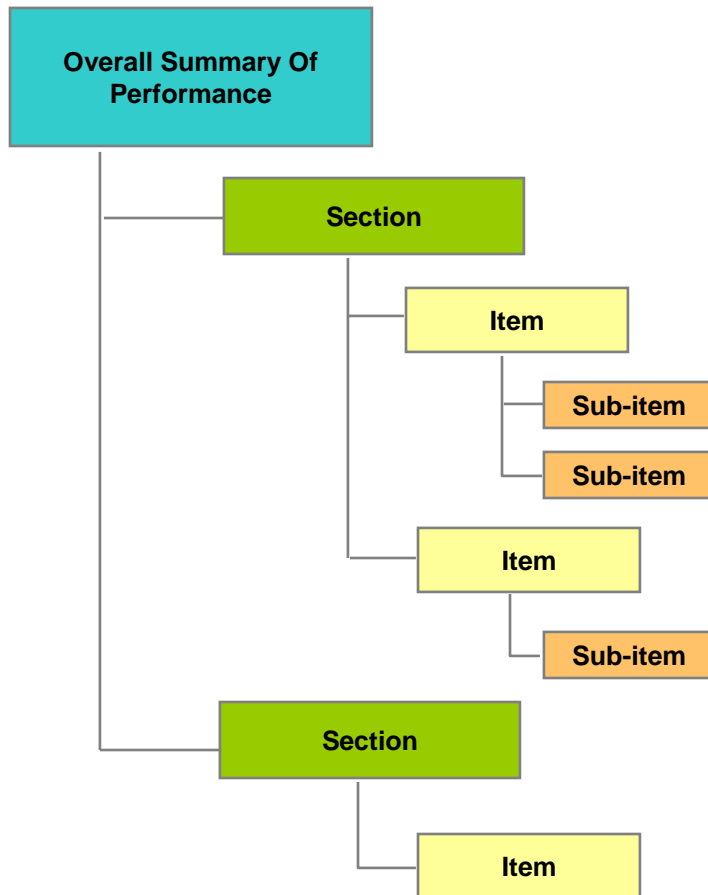
Access your performance and development documents, and evaluations you have done for others.

 My Performance Documents Create, update, or view your performance documents. <ul style="list-style-type: none">Create DocumentsCurrent DocumentsHistorical Documents	 Other's Performance Documents Accept, decline, update or view performance evaluations for other individuals. <ul style="list-style-type: none">Pending Evaluation RequestsCurrent EvaluationsHistorical Evaluations	 My Development Documents Create, update, and view your development documents. <ul style="list-style-type: none">Create DocumentsCurrent DocumentsHistorical Documents
 Other's Development Documents Accept, decline, update or view development evaluations for other individuals. <ul style="list-style-type: none">Pending Evaluation RequestsCurrent EvaluationsHistorical Evaluations	 Performance Notes Maintain personal notes about your performance.	

How To: Documents and Templates

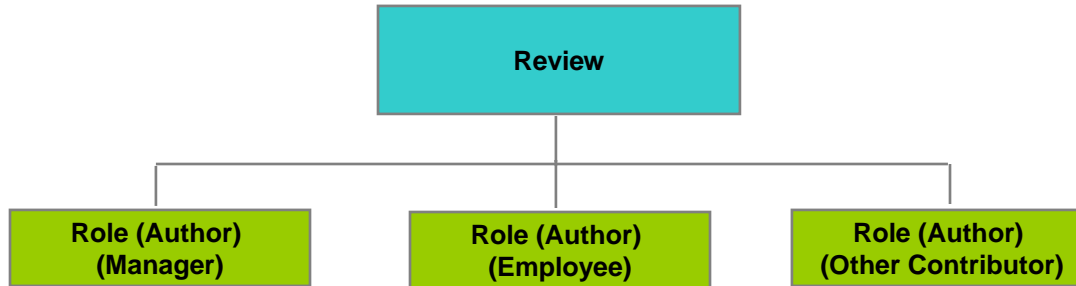


Performance Review Structure



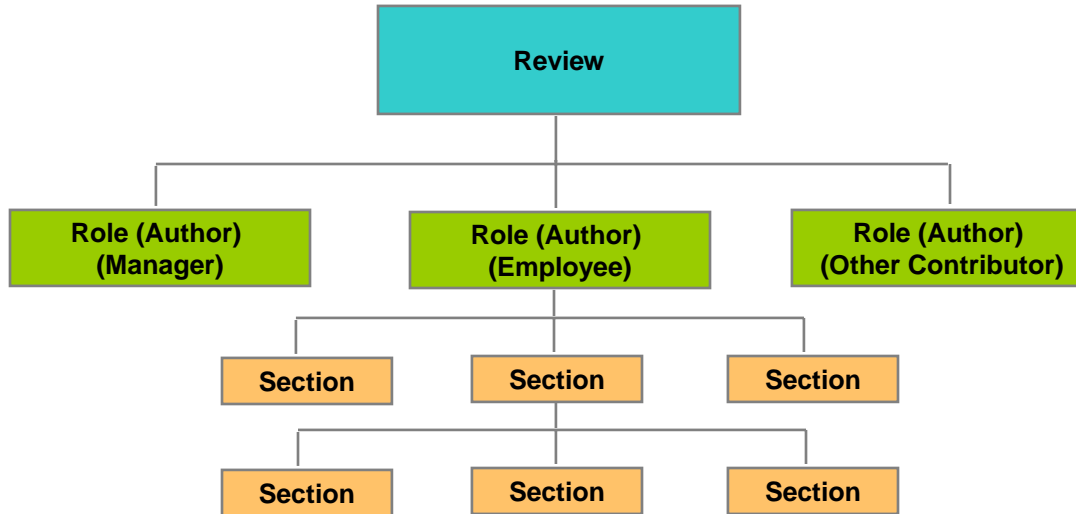
- Performance Review is hierarchical.
- Sub-items, Items and Sections can all be rated and “weighted”.
- Calculations automatically roll-up to the next level, but can be overridden at each level.
- Rating Models can be mixed everywhere.

Multi-document Framework



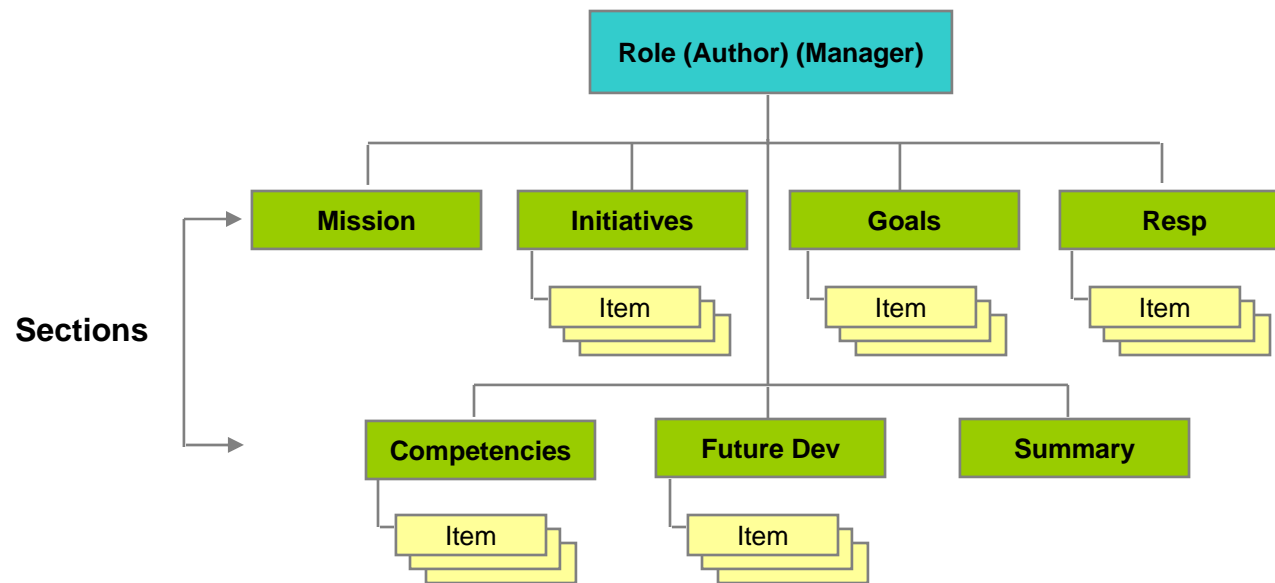
- Logical sub-documents
- The review document is also the performance plan
- Allows for many participants
- Allows for employee-manager collaboration
- Manager's sub-document is the "official" review

Documents and Sections



- Each logical sub-document contains one or more sections (review criteria)
- Many sections are pre-defined (i.e., goals, responsibilities, competencies, etc.)
- Additional sections can easily be configured

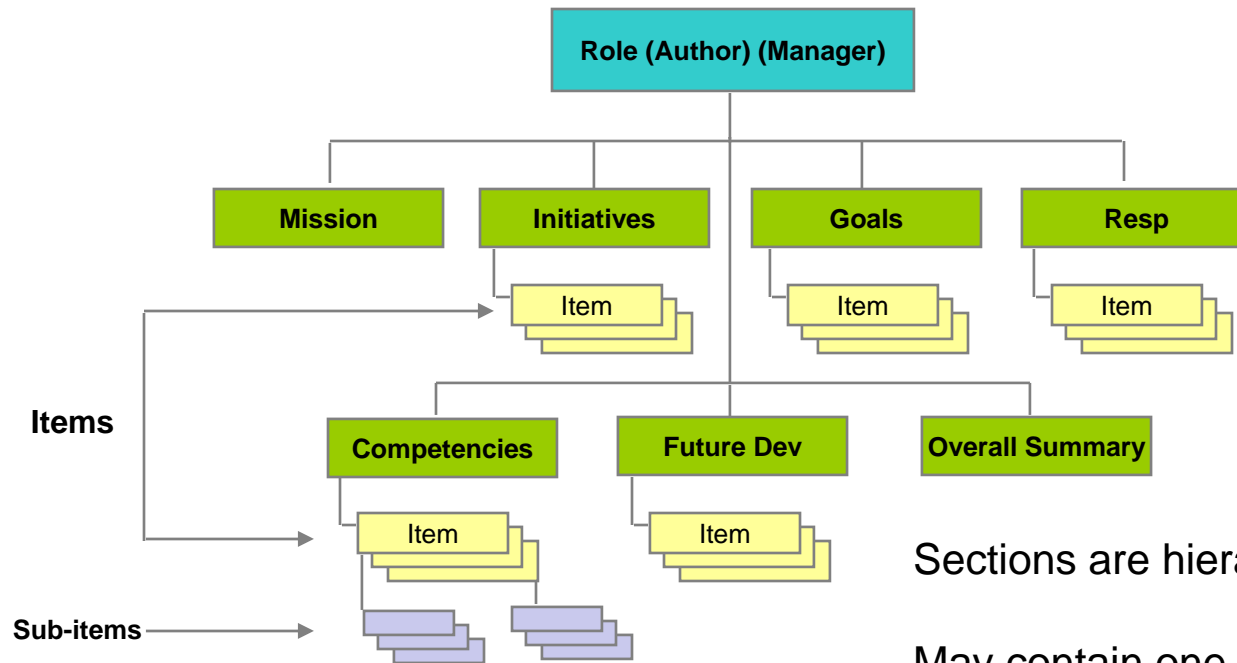
Sections



Sections are logical groupings of information. may (or may not) be actual review criteria. Examples of sections:

- Mission
- Goals
- Initiatives
- Responsibilities
- Competencies
- Development
- + ***User-Defined***

Sections



Sections are hierarchical.

May contain one or more “Items”.

Items may contain one or more “Sub-items”

Example- “Initiatives” section contains:

- Increase Customer Satisfaction (Items)
- Fewer Calls for Call Center (Sub-Items)

Sections

Section Definition

Section Type: GOALS

Section Definition Detail Find | View All First 1 of 1 Last

Effective Date: 01/01/1900 *Status: Active

*Description: Goals Section

Section

Rate Section Items

Weight Section Sub-Items

Comments *Special Processing: None

Items

Description Status

Measures Percentage Completed

Supports Comments

Ownership Initialize from Job Profile

Minimum Weight Free-Form Allowed

Due Date Prompt Table: EP_GOAL_TBL

Reminder Date *Results Writer: Competency

Critical *Development Tips: Competency

Mandatory

Sub-Items

Description Free-Form Allowed

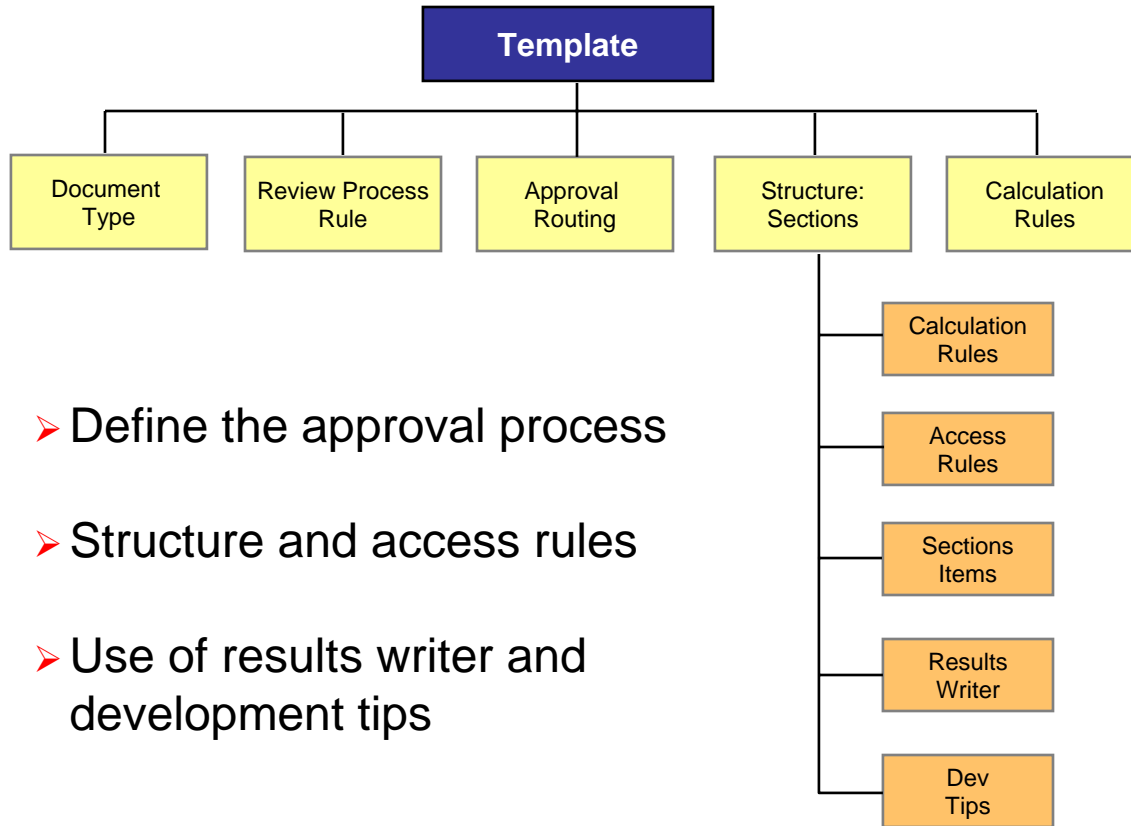
Prompt Table:

Results Writer: Not Used

Development Tips: Not Used

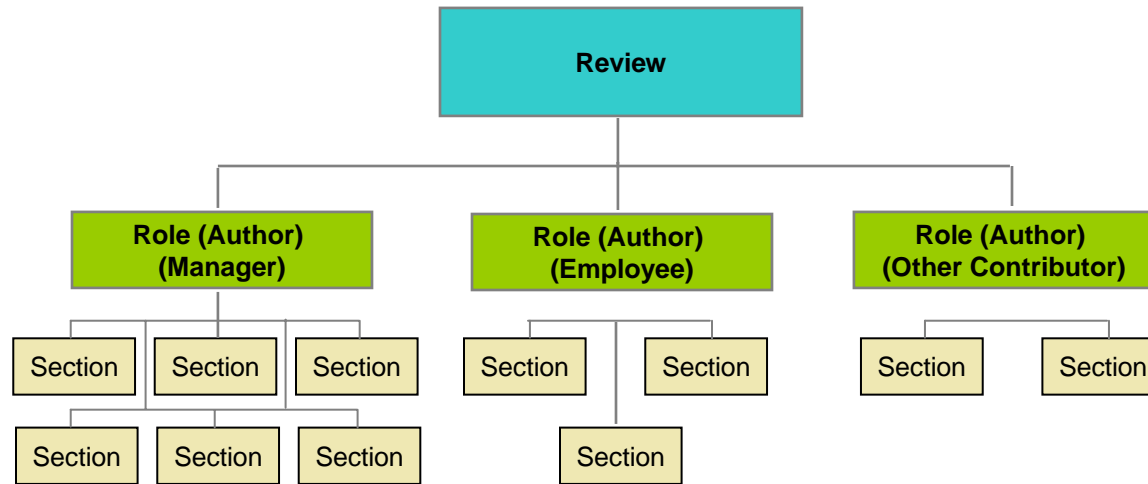
- Determine what is displayed and used
- Determine whether free form text is allowed

Templates



- Define the approval process
- Structure and access rules
- Use of results writer and development tips

Documents and Sections



- The content, look and feel of a review is defined in a Template
- Templates define not only content, but usage rules at the Role level
 - Who can see what
 - Who can do what

Document Types

Document Types

Document Type: KOANNUAL

Document Type Detail Find | View All First 1 of 1 Last

Effective Date: 01/01/1980 *Status: Active

*Description: Annual Review

Short Description: Annual

*Template Source: User Specified

Default Template: Official Review

Approval Rule Set: EP_APPRAISAL



Multiple performance document types

Examples:

- Annual Review
- Performance
- Salary Review
- Development Plan
- Responsibilities

Template Source:

- User Specified
- Job Profile
- Position
- Job Codes

Templates

General Process Structure Content

Docu
1

General Process Structure Content

Establish
1

Document Type: PERFORM Performance Document
Template ID: K0PERF Effective Date: 01/01/1980

Sections Find | View All First 1 of 3 Last

*Section: Goals Section *Display Order 10

Section

Rate Calculation Method: Average
 Preliminary Rating Rating Model: K001
 Weight Minimum Weight: 0 Weight: 0
 *Special Processing: None

Items

Enable Items
 Free-Form Allowed Prompt Table: EP_GOAL_TBL
 Initialize from Job Profile Source: Not Used
 Rate Use Section Rating Model
 Weight Minimum Weight
 Description ..

Section Roles

*Role	Rate Section	Rate Item	Rate Sub-Item	Override Rating	Numeric Rating	Weight Section	Weight Item		
Employee	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	+	-
Manager	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	+	-
Other	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	+	-
Peer	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	+	-

Participa
*Role
Employ
Manage
Other
Peer

Role
Other
Peer

Review

Anon
Role
Other
Peer

Manag
*F
Ap
View

Evaluat

- Routing and approvals
- Structure
- Access Rules

Review Process and Approval Routings

Approvals & Reviews

When?

Review Process

5 Options

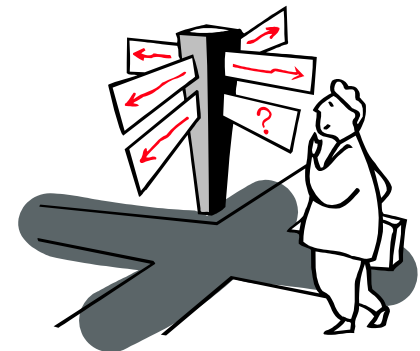
- Approval After Review Held
- Approval Before Review Held
- Approval No Review Held
- No Approval No Review Held
- No Approval Review Held

Who?

Review Process

3 Options

- Approved by the manager's manager and ePerformance HR administrator.
- Approved by ePerformance HR administrator only.
- None





Integrated Content Suppliers

- Content Providers
 - CCHKnowledgePoint
 - Lominger

- Benefits
 - Faster time to benefit
 - Expert content

- Optional to use this content
 - Build your own
 - Use another supplier

- Content is loaded using File Load utility

Adviser Tools

- Language Checker
 - Identify objectionable word
 - Suggest alternatives

- Development Tips
 - Suggest ways for employees to improve competencies

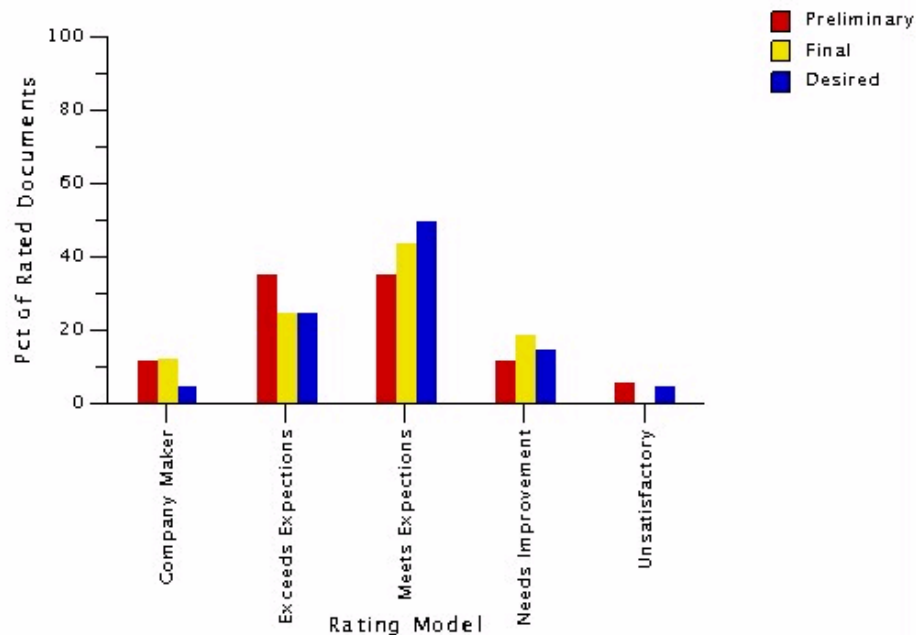
- Results Writer
 - Predefined statements that describe an employee's proficiency in a particular competency

- Create your own content or buy from other provider

Embedded Analytics

Performance Rating Distribution

Group ID:	EP_DEMO	ePerformance - KU0100 - KU0200	
Document Type:	K0ANNUAL Annual Review		From Date: 01/01/2001
Period Basis:	Pd Begin		To Date: 12/31/2002
Rating Model:	K001 Average/Summation Rating Model	Total Prelim Rated Documents:	17
Calc Method:	Average	Total Final Rated Documents:	16
Last Updated:	10/16/2002	Total Documents:	18

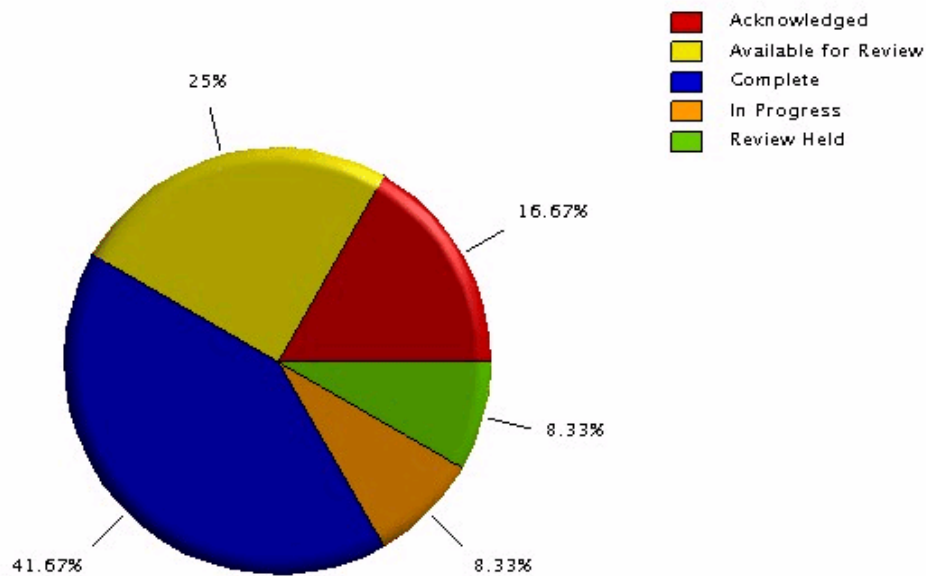


- Performance Rating Distribution shows preliminary, final and desired rating distribution
- Also drill down to see employees in each group

Embedded Analytics

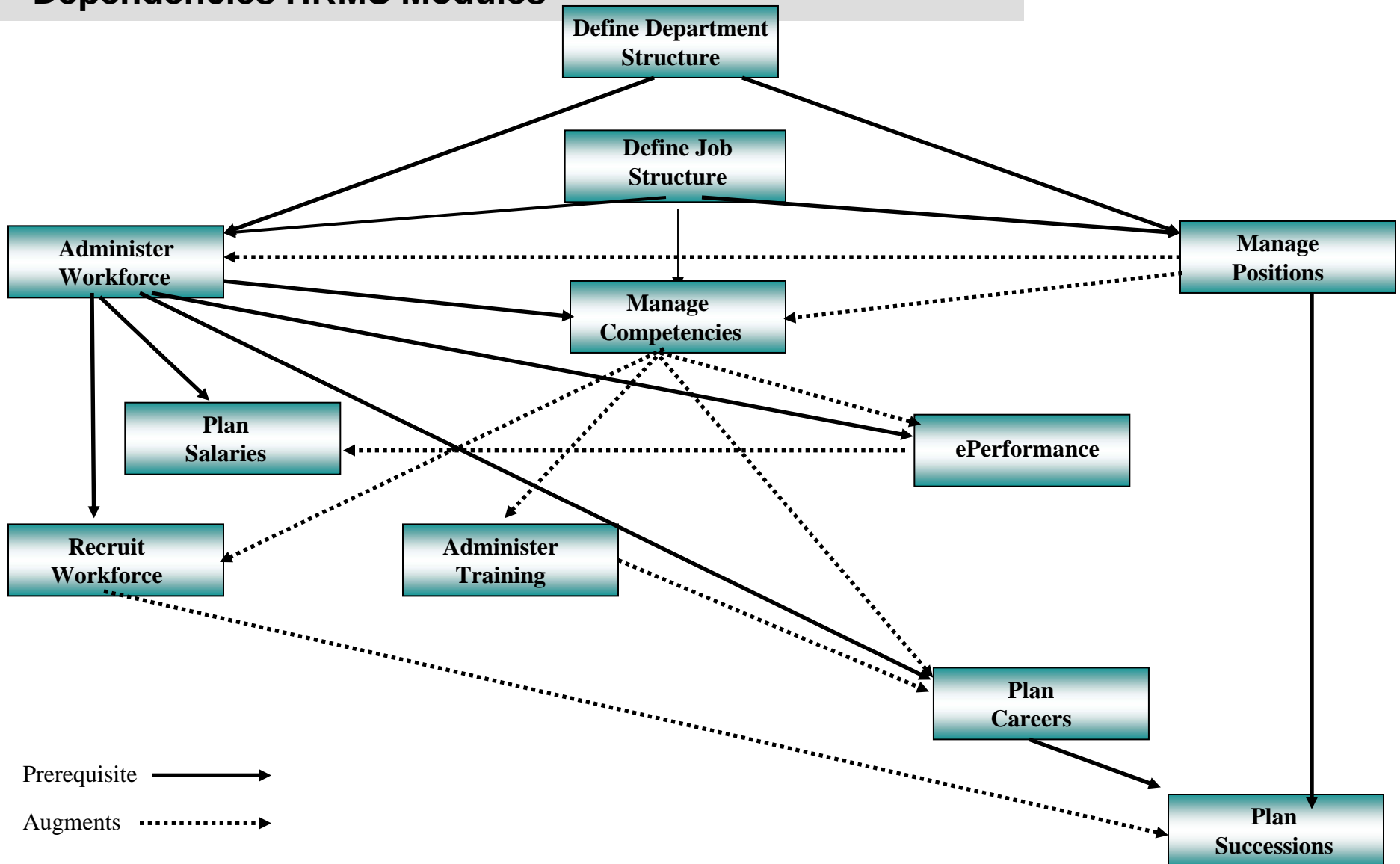
Performance Status Summary

Group ID: KU110 ePerformance Group for KU0068
Doc Type: KOANNUAL Annual Review
Period Basis: Pd Begin **From Date:** 01/01/2002 **To Date:** 12/31/2002
Total Documents: 9 **Last Updated:** 10/23/2002



- Performance Status Summary shows document statuses
- Also drill down to see employees in each group

Dependencies HRMS Modules



Wrap - Up



Why Do You Need ePerformance

Greatest
Asset



Employees



- ePerformance helps retain key employees
- Helps improve employee performance while addresses any performance issues
- Compares performance over a period of time
- Provides continuity company wide
- Proactive, timely and constructive feedback
- Open interaction between Managers and Employees
- Acknowledges individual contributions
- Develops Relationships

Implementing?

What You Should Consider

- What is driving your organization
- Up front analysis is key
 - Prioritize
 - Phased Implementation?
- Which Functionality Fits?
 - Multiple Document Types?
 - Manager
 - Employee
 - Multi-Rater?
 - Workflow (how much)?
 - Approvals (how many)?





How We Can Help

Contact us / or drop your business card for the presentation or to learn how we can help you with:

- ePerformance Assessments
- ePerformance Implementations
- ePerformance Optimizations

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Appendix: More Information



Setup and Implementation

- Dependencies
- Define installation parameters
- Activate workflow
- Administration tasks
- Inquiry pages
- Reports



Optional Setup Tasks

- Create job profiles
- Import third party content
- Enter parameters for Rating Distribution report
- Modify text for self-service pages

Document Performance

Create Performance Documents

Below is a list of employees that you selected for Performance Document Creation. Complete the information in the *Document Creation Details* section below, then click the **Create Documents** pushbutton to generate documents for these employees.

Document Creation Details

Document Title:

Current Performance Documents

Document Details

Section 2 - Employee Goals

[View](#) **Performance Document - Annual Review**

Go: **Manager Evaluation**

Doc: Adland Chu, Clerk-Payroll Sr
Annual Review: 01/01/2002 - 12/31/2002

Author: Betty Locherty **Role:** Manager
Status: In Progress **Due Date:** 12/21/2002
Approval: Not Submitted

Enter ratings and comments for each section in this evaluation, if applicable. Save entries made on the evaluation by selecting the Save button.

[Return to Document Detail](#)

[View Printable Evaluation](#)

➤ Create document

- By Groups
- By Specific Employees

➤ Verify Status

➤ Enter information

➤ Maintain performance document

Document Performance

- Performance notes
- Manager
- Employee

Maintain Performance Notes

Enter the Employee Id of the subject employee to be filtered further by entering a "Starting Date".

New notes can be added and existing notes can be edited. To edit or access the details of an existing note, click on the "Details" button.

Search Criteria

Empid:

Earliest Note Date:

Performance Notes Detail

You have chosen to enter or update the Performance Notes on the employee indicated below. Enter your comments in the box below, then click the **Save** button.

Performance Notes Detail

Empid: Performance Notes Detail

DateTime: Charles Baran

Comments: You have chosen to enter or update the Performance Notes on the employee indicated below. Enter your comments in the box below, then click the **Save** button.

Performance Notes

Charles Baran

Listed below are the performance notes you have received. To view the details of a note, click on the "Details" button. To edit or access the details of an existing note, click on the "Details" button.

Your notes are private - they cannot be viewed by you.

Search Criteria

Employee ID: KU0002 Baran, Charles

Earliest Note Date:

Performance Notes Detail

Employee ID: KU0002 Baran, Charles

DateTime: 10/02/2003 8:08PM

Comments:

Dependencies

- Mandatory
 - Administer Workforce
 - Person, Employment and Job
 - Direct Reports Set-up
- Augment
 - Manage Competencies
 - Competency dictionary to rate competencies in appraisals
 - Job Profiles
 - Competencies and responsibilities which may be used to populate templates for employees in like jobs
 - Salary Planning Integration
 - Integrate appraisal results into salary planning



Define Installation Parameters

General Settings

Last Document ID:

Allow Language Override

Debug Options

Debug Rating Calculations

Configure e-Mail Notifications

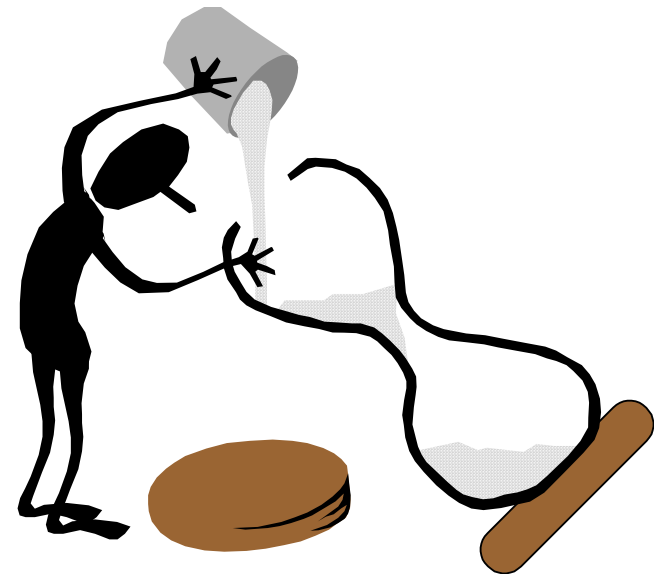
- Manager document was created by HR (Recipient is Manager)
- Employee personal document was created (Recipient is Employee)
- Employee completed personal document (Recipient is Manager)
- Manager completed personal document (Recipient is Employee)
- Manager sent personal document back for rework (Recipient is Employee)
- Manager marked document available for review (Recipient is Employee)
- Manager requested acknowledgement of review (Recipient is Employee)
- Employee acknowledged review was held (Recipient is Manager)
- Due date of document was changed (Recipient is Manager or Employee)
- HR reset status of Manager document (Recipient is Manager)
- Ownership of document was transferred (Recipient is new owner)
- Performance Criteria document was created (Recipient is Manager or Employee)
- Performance Criteria document was completed (Recipient is Manager or Employee)
- Performance Criteria document was reopened (Recipient is Manager or Employee)
- Nomination was submitted (Recipient is Nominee)
- Nomination was accepted (Recipient is Submitter)
- Nomination was declined (Recipient is Submitter)
- Nomination was canceled (Recipient is Nominee)
- Evaluation was canceled (Recipient is Reviewer ID)
- Document was canceled
- Evaluation was completed
- Other participant document was completed

Configure Document Selection Page - Displayed Fields

<input checked="" type="checkbox"/> Begin Date	<input checked="" type="checkbox"/> Manager Name
<input checked="" type="checkbox"/> End Date	<input checked="" type="checkbox"/> Job Title
<input checked="" type="checkbox"/> Document Status	

Administration Tasks

- Transfer document to another manager
- Change status
- Cancel document
- Delete document
- View documents for direct and indirect reports
- Enter Preliminary Ratings



Reports

- Missing documents
- Late documents

