

Instructions Performance

In this system, Employees jobroles are placed in a process workflow and goals can be created that can be worked on and reviewed.

Employees can be assigned job roles when uploading by naming them in a excel file, or by editing in the Employee list. Job roles can also be assigned from the Job Mapping System.

The screenshot shows the 'Performance 2025s' application interface. At the top, there are tabs: Start Page, My Goal & Performance Plan, Employees (highlighted in orange), and Tasks. Below the tabs, a yellow header bar says 'Performance 2025s'. Underneath are four circular icons with arrows: 'Initial step', 'Manager set goals', 'Employee Work on Goals', and 'Manager Review'. A 'SHOW FILTER ▾' button is present. On the right, a modal window is open for 'Employee Name: Roland Hemming' with fields for Employee ID (001234), Department (Utveckling dag), Division (Utveckling), Job Role (Fireman), Manager Name (Kalle Anka), and Manager ID (1000). At the bottom, there is a table for 'Employee' and an 'Add Employee' button, along with 'Download selection' and 'Upload Employees' options. The table shows two rows of data:

Employee ID	Employee Name	Included in Review	Department	Division	Job Role	Job Profile	Job Family	Job Sub Family	Job Grade	Manager Level	Country	Manager Name	Manager ID
001234	Roland Hemming	<input checked="" type="checkbox"/>	Utveckling dag	Utveckling	Fireman	Visst köksansvar	HR	HR Admin	10	Executive	Finland, Norway	Kalle Anka	1000
001234	Roland Hemming	<input checked="" type="checkbox"/>	Utveckling dag	Utveckling	C# Specialist	Visst köksansvar	Insurance		12	Branch	Finland	Kalle Anka	1000

Below the table is a smaller table for 'Employee GlobalIdentifier' with three rows:

Employee Key	Employee GlobalIdentifier	Employee Name	Department	Division	Job Role	Manager Name	Manager GlobalIdentifier
1	15 101	Edvard Hemming	Utveckling dag	Utveckling	CEO	Kalle Anka	002011
2	16 1010	Hans Zimmer	Firearms	Law Enforcement	Prime Minister	Urban Karl	34sdftrdfsd

System Setup

1. Create process
2. Create Process Steps

1. Create Process

The screenshot shows the 'PROCESS SETUP' section. It includes a 'Flow Restriction' table for 'Performance 2025s' (status: Started) and a 'Goal Sections' table. The 'Goal Sections' table has a row for 'Personal' with weight 100 and purpose 'Common'. A 'Delete' button is next to the row. On the right, there are 'Edit' and 'Delete' buttons for the flow restriction table. A 'Save' and 'Cancel' button are at the top right of the process creation form. A 'Goal Section' button is also present. A 'Add Process' button is located at the bottom right.

Flow Restriction	Status
Performance 2025s All employees must finish previous step	Started Edit Delete

Name	Weight	Purpose
Personal	100	Common Edit Delete

The process needs a name. Flow restriction dictates if employees need to wait for other employees before being moved to forward steps. Process status needs to be set to "started" in order to work on it. Every process needs at least one goal section.

2. Create Process Steps

Enter name of Process Step

Priority: Enter prio c

Description

Enter description of Process Step

Process Step Flow

Add Step Exit

Target Step: Select Target Process Step

Actor: Select Actor

Delete

Process Step Permissions

Add Step Permission

Permission: Select Permission

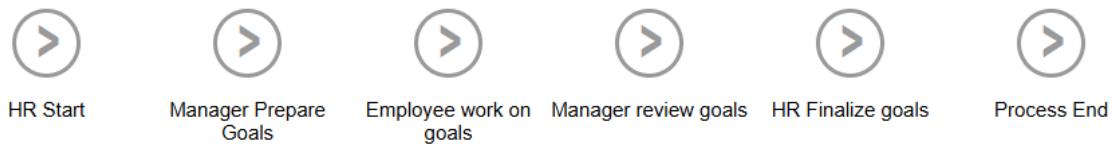
Review Goals

Edit Goals

Actor: Employee

Delete

Every process step needs a name and priority. Priority determines the order in which the steps are shown in the workflow.



Process step permissions set which Actors can work in the step.

Actor

Manager

Select Actor

Employee

Manager

HR

Permission

Edit Goals

Select Permission

Review Goals

Edit Goals

The current permissions are Review Goals which allows an actor to set their review score. Edit goals allows actors to edit/delete/create goals.

HR/admin can exclude/include employees jobroles in the process. Permission for this does not need to be set.

Process Step Flow (Step Exit) should be worked on AFTER all steps are created because they need target steps to be set. They determine how employees jobroles are transferred between steps.

Process Step Flow

Add Step Exit

Target Step	Actor	
Employee work on goals	Manager	Delete
Select Target Process Step		
HR Start		
Manager Prepare Goals		
Employee work on goals		
Manager review goals		
HR Finalize goals		
Process End		

Simply select a target step and an actor that should be able to transfer job roles from the current step.

HR transfers all job roles in the step. Manager transfer its subordinates. Employee can only transfer itself.

Sample process setup:

HR Start	Edit Delete
Description	
This is sfkjdf aösdklfj ikaösdj fkasjd fköasjdöfkjas dölkfja sjkdf awjk ajksdf hijkafsd hijkasd fijka hsj	
Process Step Flow	
Target Step	Actor
Manager Prepare Goals	HR
Process Step Permissions	
Permission	Actor

Manager Prepare Goals	Edit Delete
Description	
a sdf hasdhjka shdfj asljkfd asjikdf jöhasjkfd ajlskod	
Process Step Flow	
Target Step	Actor
Employee work on goals	Manager
Process Step Permissions	
Permission	Actor
Edit Goals	Manager

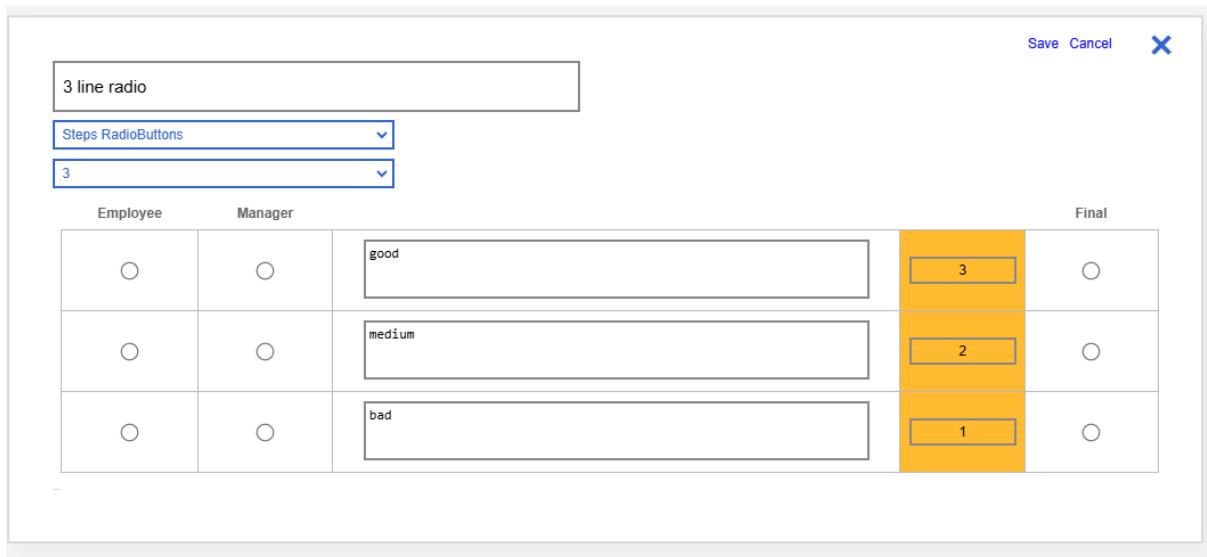
Employee work on goals	Edit Delete
Description	
sdfasd fasdf asdf asddf asdf as	
Process Step Flow	
Target Step	Actor
Manager review goals	Employee
Process Step Permissions	
Permission	Actor
Review Goals	Employee

Create Goal Types

Sysadmin and HR can create goal types.

There are currently four goal types that can be created:

Radio button goal type



3 line radio

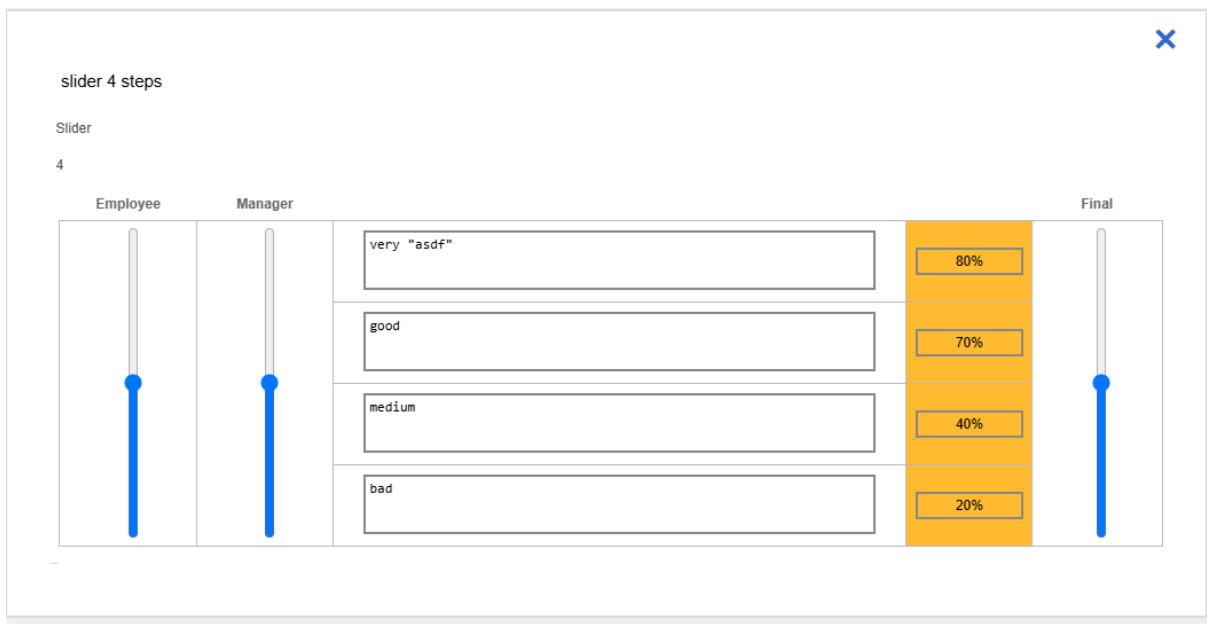
Steps RadioButtons

3

Employee	Manager		Final
<input type="radio"/>	<input type="radio"/>	good	<input type="radio"/> 3
<input type="radio"/>	<input type="radio"/>	medium	<input type="radio"/> 2
<input type="radio"/>	<input type="radio"/>	bad	<input type="radio"/> 1

Has radiobuttons for reviewing. Number of steps can be set.

Slider goal type



slider 4 steps

Slider

4

Employee	Manager		Final
<input type="radio"/>	<input type="radio"/>	very "asdf"	<input type="radio"/> 80%
<input type="radio"/>	<input type="radio"/>	good	<input type="radio"/> 70%
<input type="radio"/>	<input type="radio"/>	medium	<input type="radio"/> 40%
<input type="radio"/>	<input type="radio"/>	bad	<input type="radio"/> 20%

Has sliders for reviewing. Number of steps can be set.

Traffic Lights goal type

traffic with performance

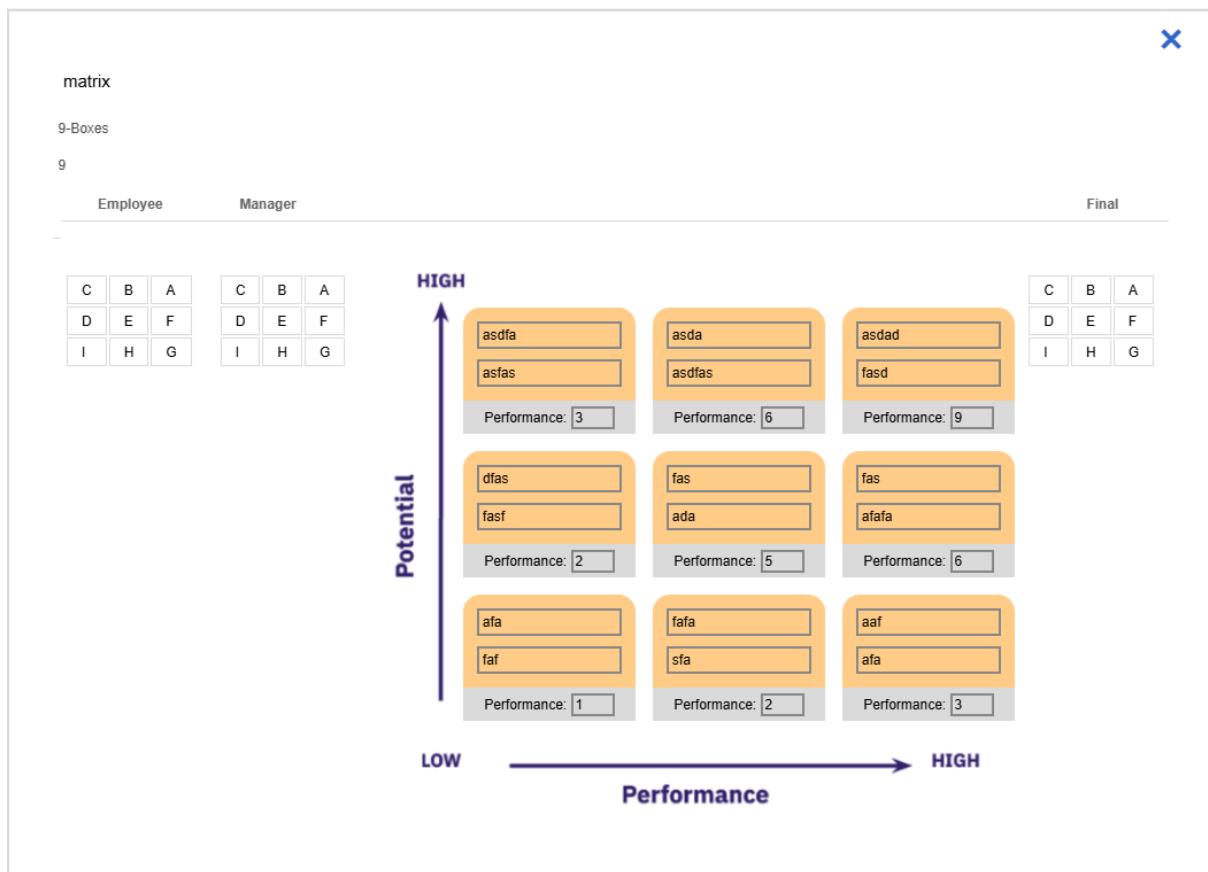
Traffic Lights

3

Employee	Manager	Goal Rate	Performance	Final									
		<table border="1"><tr><td>1</td><td>Not Good</td></tr><tr><td>2</td><td>Ok</td></tr><tr><td>3</td><td>Very Good</td></tr></table>	1	Not Good	2	Ok	3	Very Good	<table border="1"><tr><td>1</td></tr><tr><td>4</td></tr><tr><td>5</td></tr></table>	1	4	5	
1	Not Good												
2	Ok												
3	Very Good												
1													
4													
5													

Has traffic lights for reviewing. Always three steps.

9 Boxes



Has exactly 9 boxes representing points on the potential/performance graph.

Include Employee roles

When a process is started. Employee roles are not automatically included in the process.

HR or Sysadmin can include.

Send Employees to Manager Prepare Goals

SHOW FILTER ▼

Employee ID	Employee Name	Included in Review	Department	Division	Job Role	Job Profile	Job Family	Job Sub Family	Job Grade	Manager Level	Country	Manager Name	Manager ID
001234	Roland Hemming	<input checked="" type="checkbox"/>	Utveckling dag	Utvckling	Fireman	Visst köksansvar	HR	HR Admin	10	Executive	Norway, Finland	Kalle Anka	1000
001234	Roland Hemming	<input checked="" type="checkbox"/>	Utveckling dag	Utvckling	Cf Specialist	Visst köksansvar	Insurance		12	Branch	Finland	Kalle Anka	1000
10	Robert	<input checked="" type="checkbox"/>	Firearms	Law Enforcement	Head Wizard	Visst Leveransansvar	HR	HR Generalist	19	Executive	Norway	John Williams	1001
1000	Danny Elftman	<input checked="" type="checkbox"/>	Firearms	Law Enforcement	Key Grip	Visst köksansvar	Marketing	Marketing Sales	30	Branch	Sweden, Norway, Finland	Urban Karl	1004

Sending employee roles to another step as HR

HR To-do: Goal & Performance

ny process 2025

	Employee Roles
HR Start	4
Manager Prepare Goals	0
Employee work on goals	0
Manager review goals	0
HR Finalize goals	0
Process End	0

old 2024 fortfarande kvar

	Employee Roles
adsasf	0

my process 2025

HR Start Manager Prepare Goals Employee work on goals Manager review goals

Send Employees to Manager Prepare Goals

SHOW FILTER ▾

Employee ID ▾ Employee Name ▾ Included in Review Department ▾ Division ▾

001234 Roland Hemming Utveckling dag Utveckling

Employee roles can be sent to the next step if this is set in process setup. The steps that are used by HR are shown as links on the start page.

Working on goals and steps as Manager

Managers that have something to do can see on manager section on the start page.

Your To-do: Goal & Performance

ny process 2025

Manager for: Roland Hemming - Fireman

Manager for: Roland Hemming - C# Specialist

Status

old 2024 fortfarande kvar

Status

my process 2025

HR Start Manager Prepare Goals Employee work on goals Manager review goals HR Finalize goals Process End

Send Employees to Employee work on goals

SHOW FILTER ▾

Employee ID ▾ Employee Name ▾ Department ▾ Division ▾ Job Role ▾ Job Profile ▾ Job Family ▾ Job Sub Family ▾ Job Grade ▾ Manager Level ▾ Country Manager Name ▾ Manager ID ▾

001234	Roland Hemming	Utveckling dag	Utveckling	Fireman	Vist köksansvar	HR	HR Admin	10	Executive	Norway, Finland	Kalle Anka	1000
001234	Roland Hemming	Utveckling dag	Utveckling	C# Specialist	Vist köksansvar	Insurance		12	Branch	Finland	Kalle Anka	1000

Circled red to the right is a link to employees view where the manager can send employee roles. Green on the left there is a link to a specific employee role page where the manager can work on goals.

EMPLOYEE: ROLAND HEMMING
 JobRole: **Fireman**

Goals Add Goal

Enter Goal Name Save | Cancel

Goal Type: Personal Progress: 0%

Description Linked goal:

Enter description of Goal

Goal Rating

Select Goal Rating Type ▼

Employee Manager Goal Rate Performance Final

TASKS ▼

A goal needs a name and goal type that can be chosen from the created goal types.

Goals can be linked to other goals. Goals can also be cascaded to other employees. You can cascade a goal to a subordinate or colleague.

enter the matrix w2

Goal Type: Personal Progress: 100%

Description Linked goal: [View Linked Goal](#)

dasifjka sdfölk asdfjka sdölkfj ölkasd

Linked by ▼ slide with ease
step it up

[Cascade >](#)

Goal Rating

Employee Manager

C	B	A	C	B	A
D	E	F	D	E	F
I	H	G	I	H	G

HIGH

Very big talent
but sooo lazy

Very big talent
Performing ok

and hardworking

CASCADE ENTER THE MATRIX W2 X

Rolassnd Hemming - Marketing Manager
 Roland Hemming - C# Specialist

[Execute Cascade](#)

I	H	G
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Group Goals

These are goals shared by divisions, departments or the whole company. They can be linked to by personal goals. These are not reviewed and therefore does not have any mechanic attached to them.

The screenshot shows a 'Performance 2025s' dashboard. On the left, a list of goals is displayed with columns for Name, Department, and Division. The first goal is 'Do not get sued' under '123' and 'Law Enforcement'. On the right, a detailed view of this goal is shown in a modal. The modal has fields for Goal Name ('Do not get sued'), Goal Description ('Enter description of Goal'), Department ('123'), Division ('Law Enforcement'), and Goal Section ('Corporate'). There are 'Edit' and 'Delete' buttons for each row in the list.

Tasks

Goals have a task section working like a sprint board where tasks can be moved around.

The screenshot shows a 'TASKS' section. It features a 'Sprint Board' with columns: 'NOT STARTED', 'STARTED', and 'FINISHED'. Tasks are represented as cards: 'Fix the bugs' (Rating: 1) in NOT STARTED, 'Start the project' (Rating: 3) in FINISHED, and 'Make a spec' (Rating: 1) in STARTED. Below the board, a 'Task' modal is open, showing fields for Task Title ('Enter Task Title'), Description ('Enter Description of Task'), Task Status ('Not Started'), Task Due date ('mm/dd/yyyy'), and Task Rating ('1'). On the left, there are sections for 'Goal Section: Personal' and 'Weight: 50%'. A 'personality change' goal is listed with 'Goal Type: Personal' and 'Description'.

Tasks can also be viewed on the tasks page.

The screenshot shows a table of tasks. The columns are: Employee ID, Employee Name, Task, Task Status, Task Rating, Due Date, Goal Completion, Goal, and Goal Section. The data in the table is as follows:

Employee ID	Employee Name	Task	Task Status	Task Rating	Due Date	Goal Completion	Goal	Goal Section
001234	Roland Hemming	Start the project	Finished	3		100%	enter the matrix w2	Corporate
001234	Roland Hemming	Fix the bugs	Not Started	1		100%	enter the matrix w2	Corporate
001234	Roland Hemming	Make a spec	Started	1		100%	enter the matrix w2	Corporate

Comments

Both tasks and goals can have Rich Text Comments. Comments can include pictures (with resizing options)

COMMENTS ▾

[Add Comment](#)

2025-12-12 17:14 - Roland Hemming

Comment with a picture



[Save](#) [Cancel](#)

B *I* U ~~S~~ \equiv \equiv x_2 x^2 Normal \pm A \mathbb{A} \equiv

What a nice picture!

Reviewing goals

Goal Section: **Personal**

Weight: 50

Goal Section Performance: 4

personality change

Goal Type: Personal

Description

adfa sdjifkóa sdójf aóslkjdf aólskjdf fólkas fólkas fólkója sdóljkfója skd fjóla

Progress: 69%

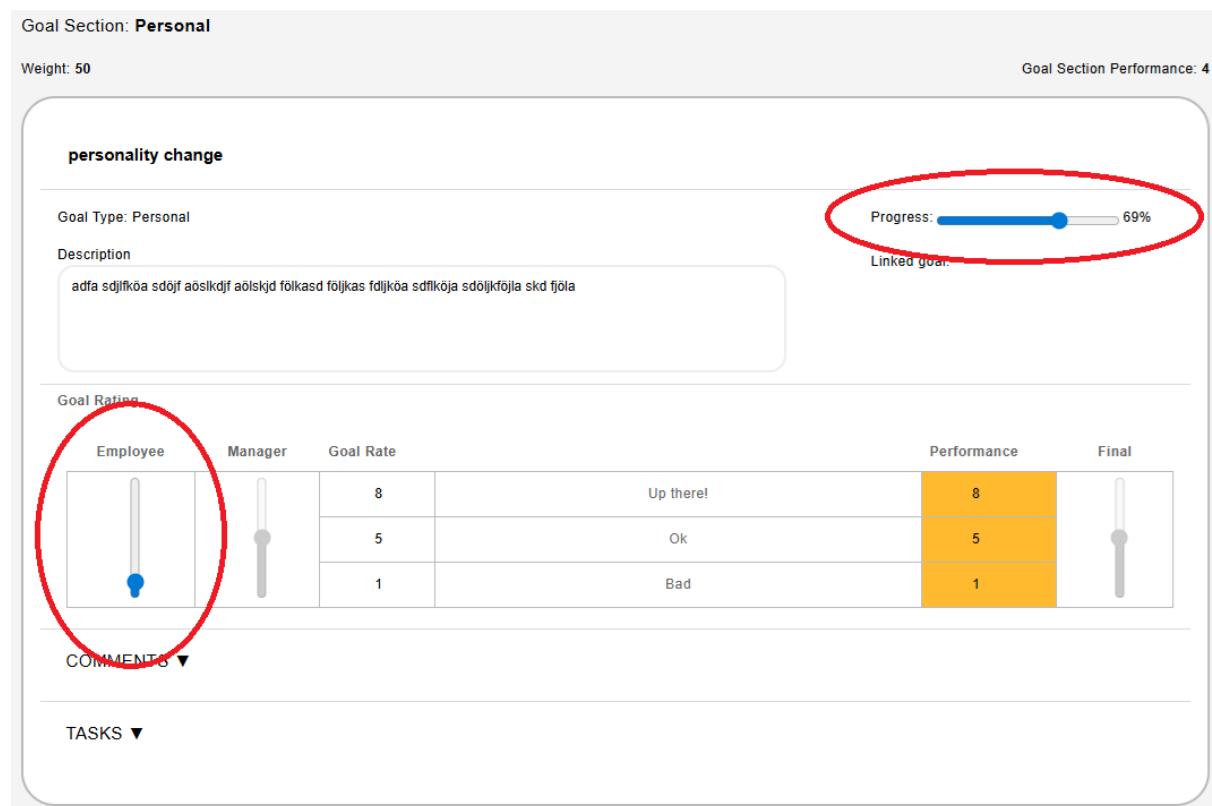
Linked goal.

Goal Rating

Employee	Manager	Goal Rate	Performance	Final
<input type="range" value="1"/>	<input type="range" value="1"/>	8 5 1	Up there! Ok Bad	8 5 1

COMMENTS ▾

TASKS ▾



If Employee/Manager/HR has permissions to review in a step, the input is available to the corresponding actor. It is automatically saved, no need to click a save button. Please note that when reviewing, the reviewer can also set goal progress.

Performance Rating

When goals have 100% progress, their rating is contributing to a sections performance rating.

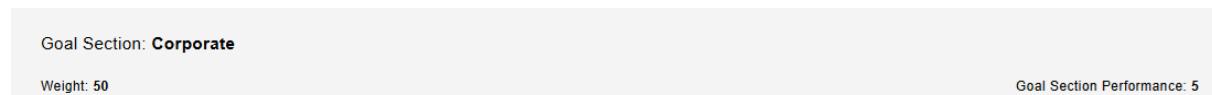
The performance rating is based on the final rating set by HR, if no such rating is set, manager rating is used. More unusual, if no manager or HR rating exist, the employee rating is used.

A goal section performance is based on the goal ratings in the section.

Goal Section: **Corporate**

Weight: 50

Goal Section Performance: 5



An employees performance is based on the goal sections weighted.



EMPLOYEE: **ROLAND HEMMING**
JobRole: **Fireman**

PERFORMANCE 4.5

Send Me to step: Manager Review