

## 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.

Start Page My Goal & Performance Plan **Employees** Tasks

**Performance 2025s**

Initial step Manager set goals Employee Work on Goals Manager Review

SHOW FILTER ▼

Add Employee

Download selection Upload Employees

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

Employee Name: Roland Hemming  
Employee ID: 001234  
Department: Utveckling dag  
Division: Utveckling  
Job Role: Fireman  
Manager Name: Kalle Anka  
Manager ID: 1000

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	34sdftrdsd

## System Setup

1. Create process
2. Create Process Steps

### 1. Create Process

PROCESS SETUP

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

Enter name of Process

Select Flow Restriction Select Process Status

Goal Sections

Name	Weight	Purpose
Personal	100	Common

Add Goal Section

Add Process

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

Cancel Save

Priority: Enter prio c

Description

Enter description of Process Step

Process Step Flow

Add Step Exit

Process Step Permissions

Add Step Permission

Target Step

Select Target Process Step

Actor

Select Actor

Delete

Permission

Select Permission

Review Goals

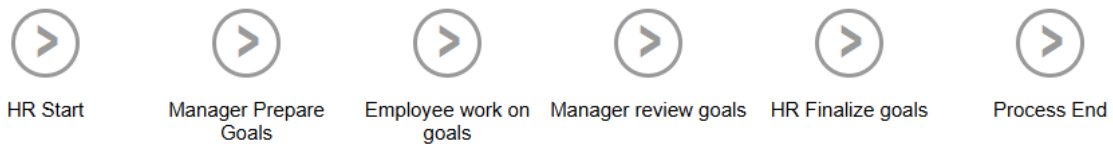
Edit Goals

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

Description

This is sñkjđj aōsđklđj lkaōsđj fkasjd fksōasjdōfñkjas dōñkfa sñkjđf awjk ajksđf hñjkasf hñjkasđ fñkja hñj

Process Step Flow

Target Step	Actor
Manager Prepare Goals	HR

Process Step Permissions

Permission	Actor
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Manager Prepare Goals

Description

a sdf hasdhjika shdfj asjkd f asjkd f jöhasjkd f ajlskd

Process Step Flow

Target Step	Actor
Employee work on goals	Manager

Process Step Permissions

Permission	Actor
Edit Goals	Manager

Employee work on goals

Description

sdfasd fasdf asdf 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	3	<input type="radio"/>
<input type="radio"/>	<input type="radio"/>	medium	2	<input type="radio"/>
<input type="radio"/>	<input type="radio"/>	bad	1	<input type="radio"/>

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

## Slider goal type

slider 4 steps

Slider

4

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

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

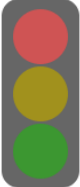

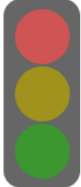
## Traffic Lights goal type

×

**traffic with performance**

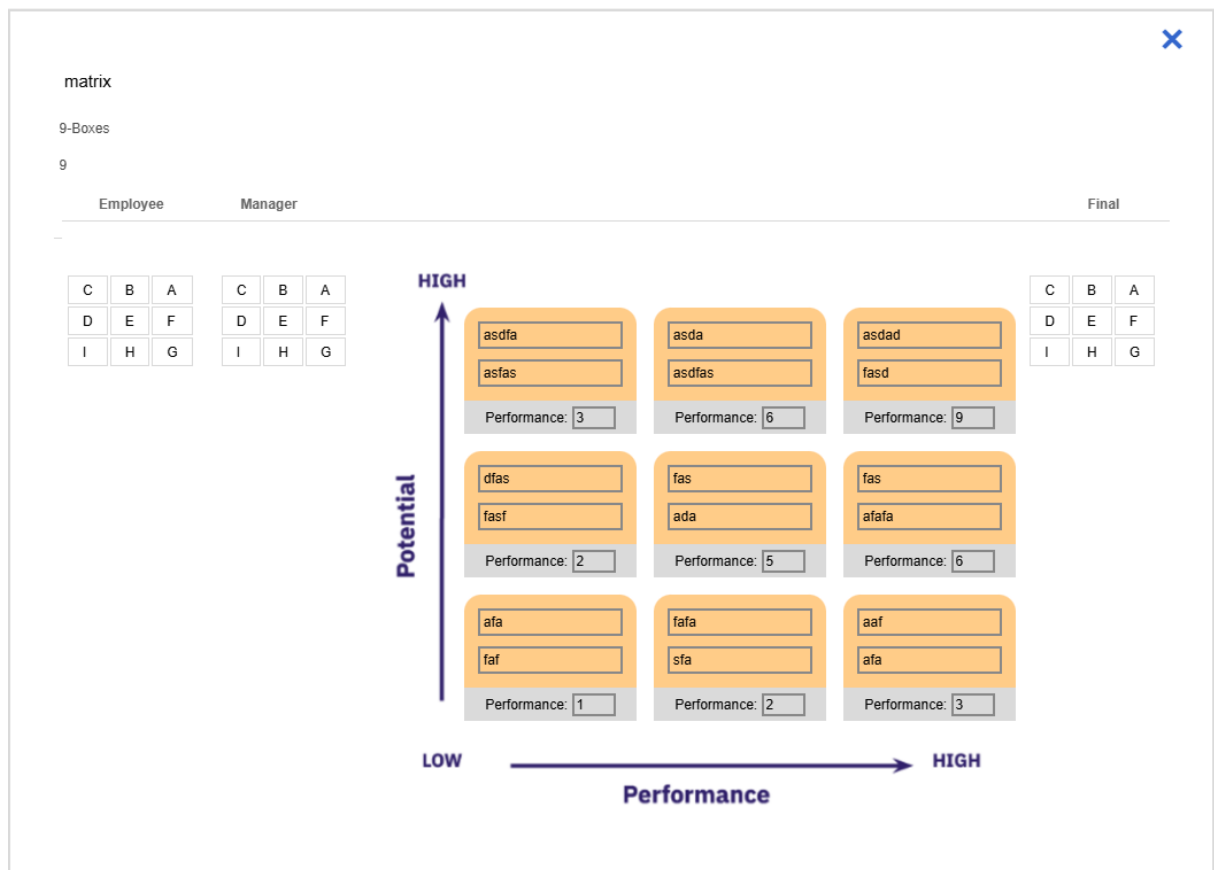
Traffic Lights

3

Employee	Manager	Goal Rate		Performance	Final
		<input type="text" value="1"/>	<input type="text" value="Not Good"/>	<input type="text" value="1"/>	
		<input type="text" value="2"/>	<input type="text" value="Ok"/>	<input type="text" value="4"/>	
		<input type="text" value="3"/>	<input type="text" value="Very Good"/>	<input type="text" value="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	Utveckling	Fireman	Visst köksansvar	HR	HR Admin	10	Executive	Norway, Finland	Kalle Anka	1000
001234	Roland Hemming	<input checked="" type="checkbox"/>	Utveckling dag	Utveckling	C# 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 Eitman	<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

The screenshot shows the 'HR To-do: Goal & Performance' interface. On the left, under 'ny process 2025', there is a list of steps: HR Start (4), Manager Prepare Goals (0), Employee work on goals (0), Manager review goals (0), HR Finalize goals (0), and Process End (0). Below this, under 'old 2024 fortfarande kvar', there is a table of Employee Roles with one entry: 'adsastf' with a count of 0.

On the right, the 'ny process 2025' section shows a flow of steps: HR Start, Manager Prepare Goals, Employee work on goals, and Manager review goals. A red circle highlights the 'Send Employees to Manager Prepare Goals' button. Below the flow, there is a 'SHOW FILTER' dropdown and a table of employee roles.

Employee ID	Employee Name	Included in Review	Department	Division
001234	Roland Hemming	<input checked="" type="checkbox"/>	Utveckling dag	Utveckli

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.


The screenshot shows the 'Your To-do: Goal & Performance' interface. On the left, under 'ny process 2025', there is a list of steps: HR Start, Manager Prepare Goals (circled in green), Employee work on goals, Manager review goals, HR Finalize goals, and Process End. Below this, under 'old 2024 fortfarande kvar', there is a table of Employee Roles with one entry: 'adsastf' with a count of 0.

On the right, the 'ny process 2025' section shows a flow of steps: HR Start, Manager Prepare Goals, Employee work on goals, and Manager review goals. A red circle highlights the 'Send Employees to Manager Prepare Goals' button. Below the flow, there is a 'SHOW FILTER' dropdown and a table of employee roles.

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	Väst köksansvar	HR	HR Admin	10	Executive	Norway, Finland	Kalle Anka	1000
001234	Roland Hemming	Utveckling dag	Utveckling	C# Specialist	Väst 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

Save Cancel

Goal Type: Personal
 

Progress:  0%

Description
 

Enter description of Goal

Linked goal:

Goal Rating
 

Select Goal Rating Type

Employee	Manager	Goal Rate	Performance	Final
<div>TASKS ▼</div>				

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
 

dasfjkl asdfjka sdólkfj ölkasd

Linked goal: [View Linked Goal](#)

Linked by ▼
 

[slide with ease](#)
[step it up](#)

[Cascade >](#)

Goal Rating
 

Employee Manager

Employee	Manager																		
<table> <tr><td>C</td><td>B</td><td>A</td></tr> <tr><td>D</td><td>E</td><td>F</td></tr> <tr><td>I</td><td>H</td><td>G</td></tr> </table>	C	B	A	D	E	F	I	H	G	<table> <tr><td>C</td><td>B</td><td>A</td></tr> <tr><td>D</td><td>E</td><td>F</td></tr> <tr><td>I</td><td>H</td><td>G</td></tr> </table>	C	B	A	D	E	F	I	H	G
C	B	A																	
D	E	F																	
I	H	G																	
C	B	A																	
D	E	F																	
I	H	G																	

HIGH

Very big talent but sooo lazy

Very big talent Performing ok

and hardworking

CASCADE ENTER THE MATRIX W2

☐ Rolassnd Hemming - Marketing Manager
 ☐ Roland Hemming - C# Specialist

[Execute Cascade](#)

## 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.

Performance 2025s

SHOW FILTER ▼

Add Goal

Name ▼	Department ▼	Division ▼		
Do not get sued	123	Law Enforcement	Edit	Delete
Increase market domination			Edit	Delete
Launch new product	Utveckling dag		Edit	Delete
Make a lot of money			Edit	Delete

Goal Name

Do not get sued

Goal Description

Enter description of Goal

Department

123

Division

Law Enforcement

Goal Section

Corporate

Save

Cancel

✕

## Tasks

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

TASKS ▼

Add Task

NOT STARTED

STARTED

FINISHED

Fix the bugs

Task Added: 2025-12-12 17:07

Rating: 1

Make a spec

Task Added: 2025-12-12 17:08

Rating: 1

Start the project

Task Added: 2025-12-12 17:07

Rating: 3

Goal Section: Personal

Weight: 50%

personality change

Goal Type: Personal

Description

Task Title

Enter Task Title

Description

Enter Description of Task

Task Status: Not Started

Task Due: mm/dd/yyyy -- --

Task Rating: 1

Save

Cancel

✕

Tasks can also be viewed on the tasks page.

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~~    $x_2$   $x^2$  Normal     

What a nice picture|

## Reviewing goals

Goal Section: **Personal**

Weight: 50




Goal Section Performance: 4

**personality change**

Goal Type: Personal


Description  
adfa sdjfköa sdöjif aölskdjf aölskdj fölkasd följikas fdjlköa sdfjköja sdöjlkföjla skd fjöla

Goal Rating

Employee	Manager	Goal Rate		Performance	Final
		8	Up there!	8	
		5	Ok	5	
		1	Bad	1	

COMMENTS ▼

TASKS ▼

Progress:  69%

Linked goal

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**

PERFORMANCE **4.5**

JobRole: **Fireman**

[Send Me to step: Manager Review](#)