



## **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:

<b>Working with the “Body Shoppers”</b>		<b>Working with the “Big Guys”</b>
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

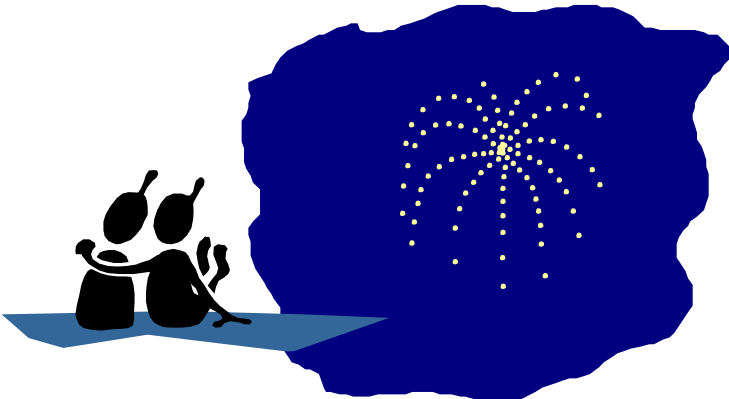
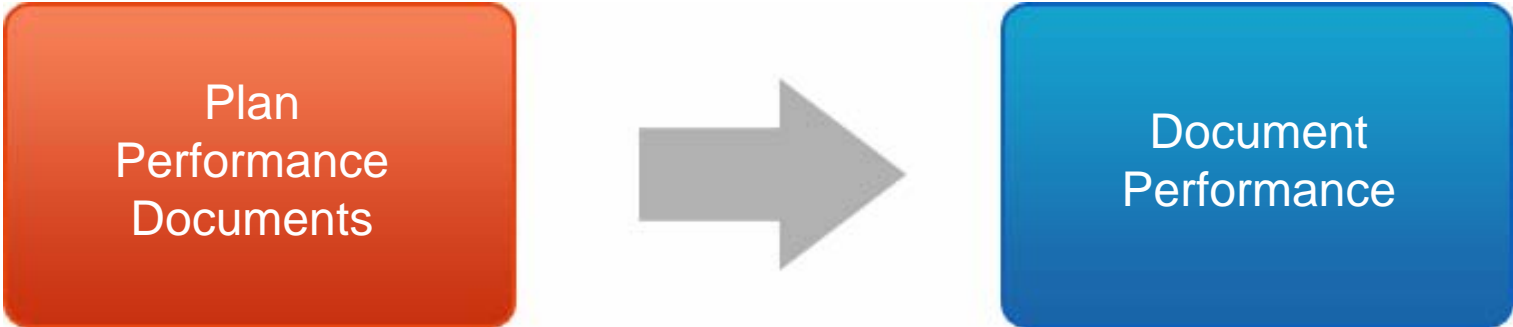


## Going The Distance

- 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

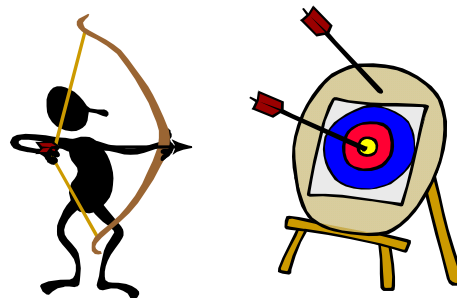
Do I want this in the document?  
Would I prefer a Vision rather than a mission statement?

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:

What Documents

FOR

Who?

Administrator

OR

Managers

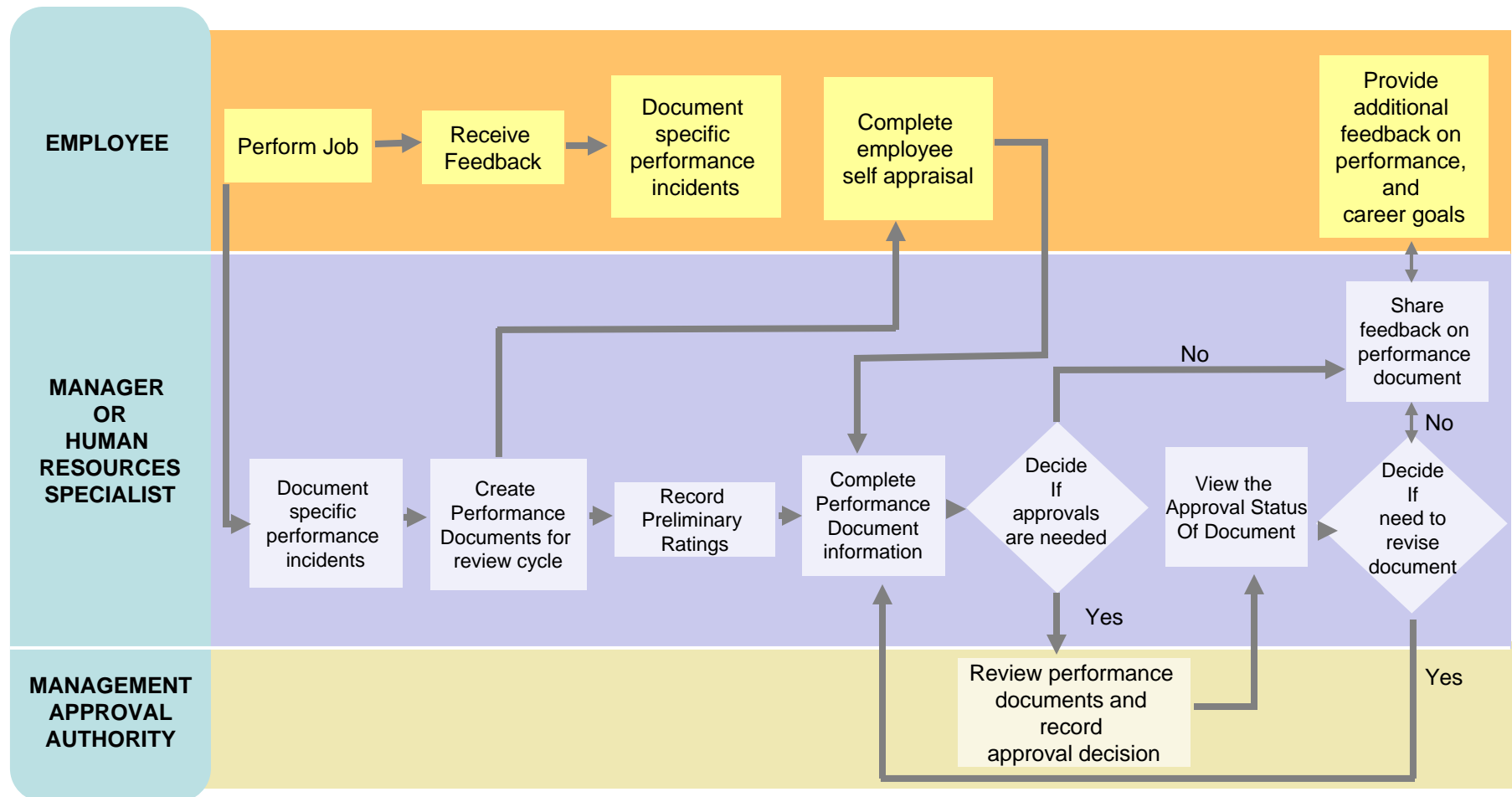
Groups

OR

Individuals

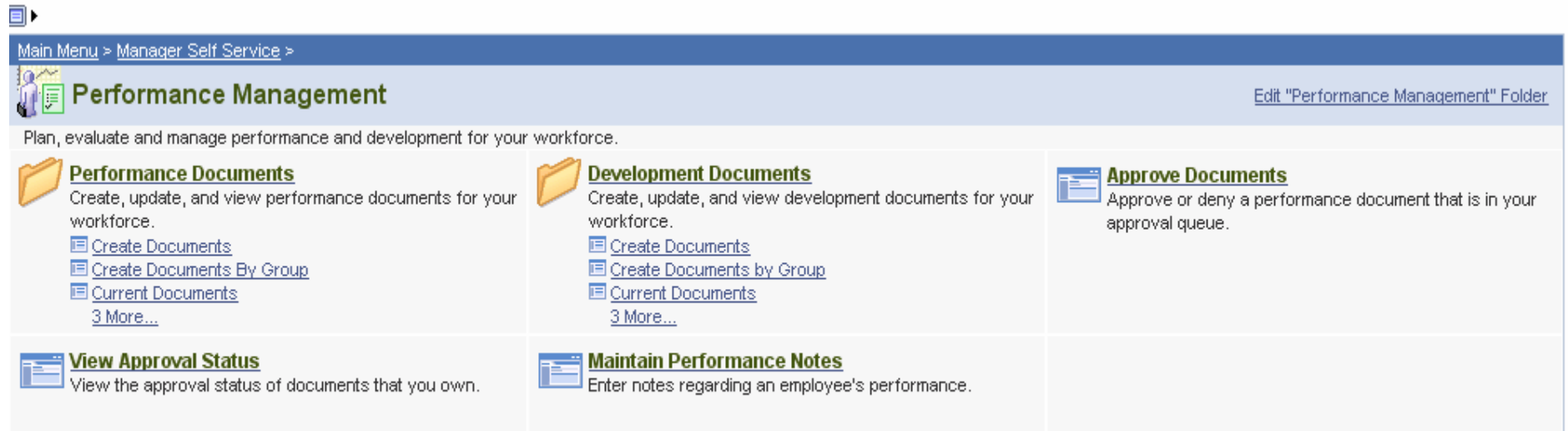


## ePerformance –Document Performance Overview



## Manager Navigation

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

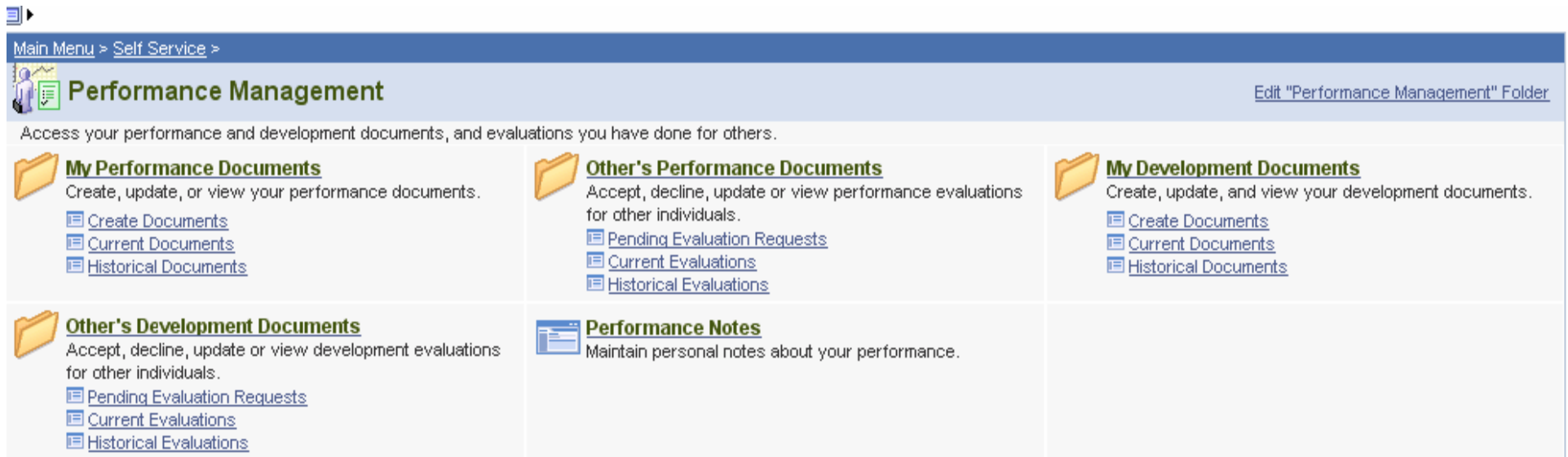


The screenshot shows a web application interface for Performance Management. At the top, there is a navigation breadcrumb: [Main Menu](#) > [Manager Self Service](#) >. Below this is a header section with a user icon, the title **Performance Management**, and a link [Edit "Performance Management" Folder](#). The main content area is titled "Plan, evaluate and manage performance and development for your workforce." and is divided into several functional blocks:

- 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.

## Employee Navigation

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



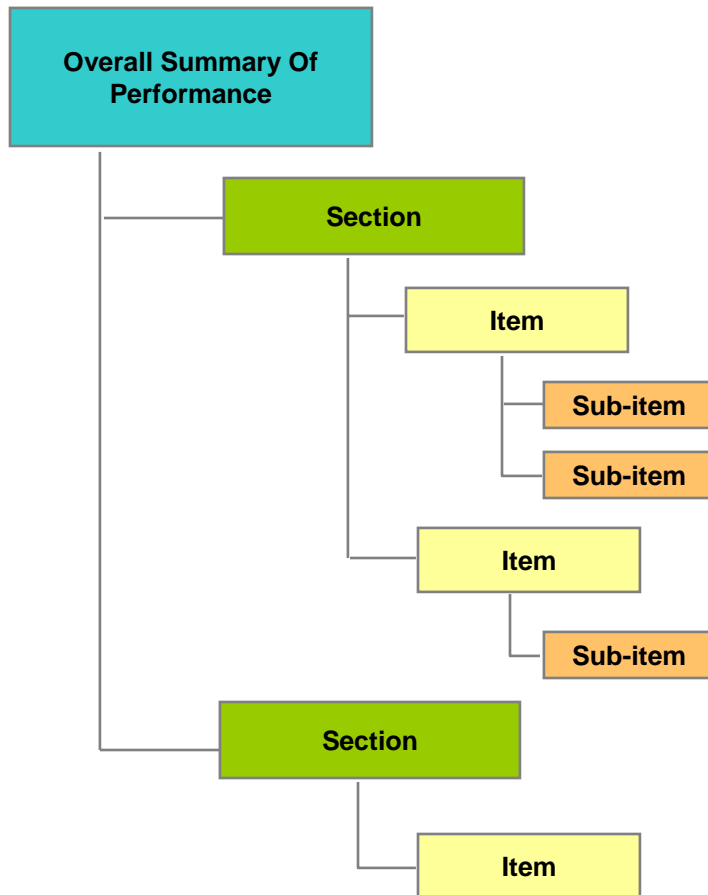
The screenshot shows the 'Performance Management' section of the drivestream interface. At the top, there is a navigation breadcrumb: 'Main Menu > Self Service >'. Below this, the page title is 'Performance Management' with a link to 'Edit "Performance Management" Folder'. A descriptive sentence reads: 'Access your performance and development documents, and evaluations you have done for others.' The page is organized into a grid of five main sections, each with a folder icon and a list of links:

- My Performance Documents**: Create, update, or view your performance documents. Links: [Create Documents](#), [Current Documents](#), [Historical Documents](#).
- Other's Performance Documents**: Accept, decline, update or view performance evaluations for other individuals. Links: [Pending Evaluation Requests](#), [Current Evaluations](#), [Historical Evaluations](#).
- My Development Documents**: Create, update, and view your development documents. Links: [Create Documents](#), [Current Documents](#), [Historical Documents](#).
- Other's Development Documents**: Accept, decline, update or view development evaluations for other individuals. Links: [Pending Evaluation Requests](#), [Current Evaluations](#), [Historical Evaluations](#).
- Performance Notes**: Maintain personal notes about your performance.

# How To: Documents and Templates

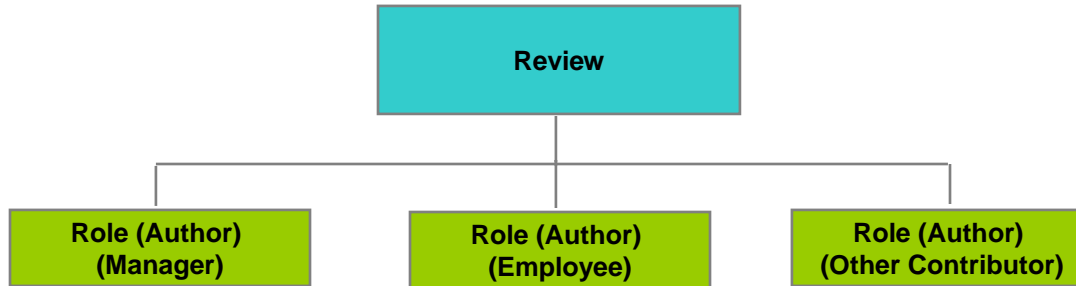


## Performance Review Structure



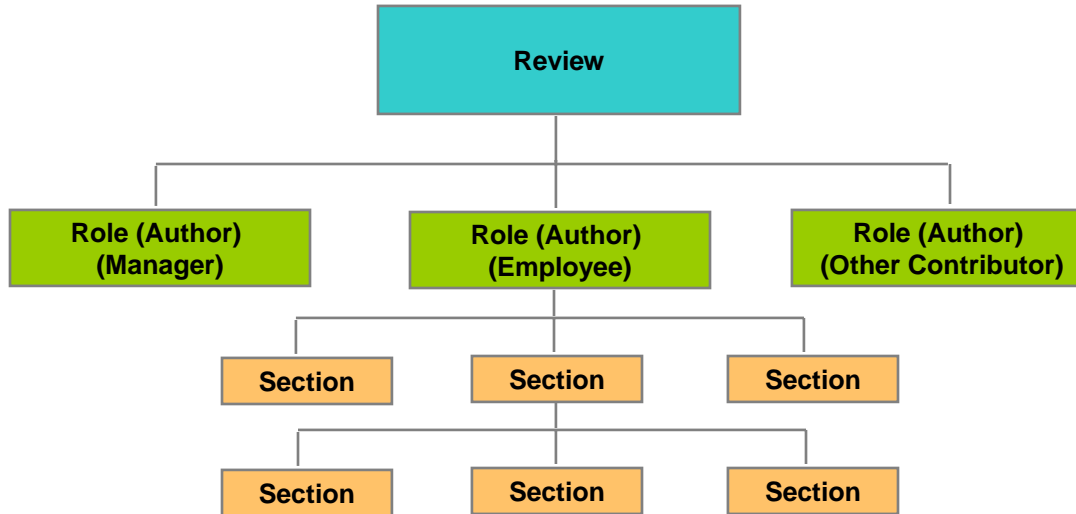
- Performance Review is hierarchical.
- Sub-items, Items and Sections can all be rated and “weighted”.
- Calculations automatically roll-up to the next level, but can be overridden at each level.
- Rating Models can be mixed everywhere.

## Multi-document Framework



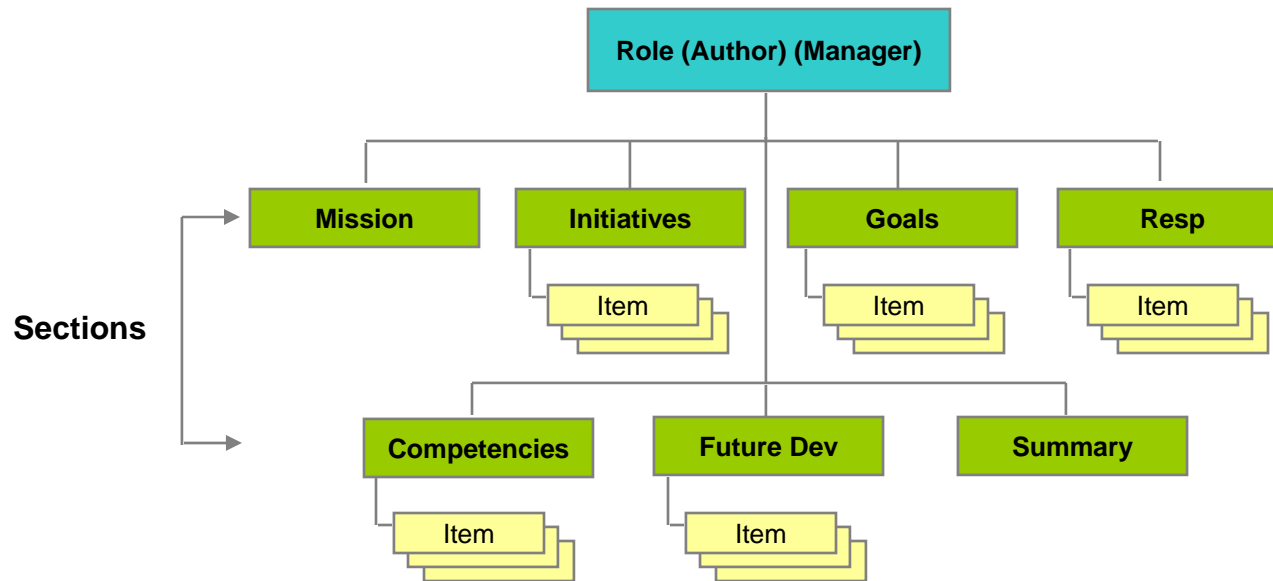
- Logical sub-documents
- The review document is also the performance plan
- Allows for many participants
- Allows for employee-manager collaboration
- Manager's sub-document is the "official" review

## 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

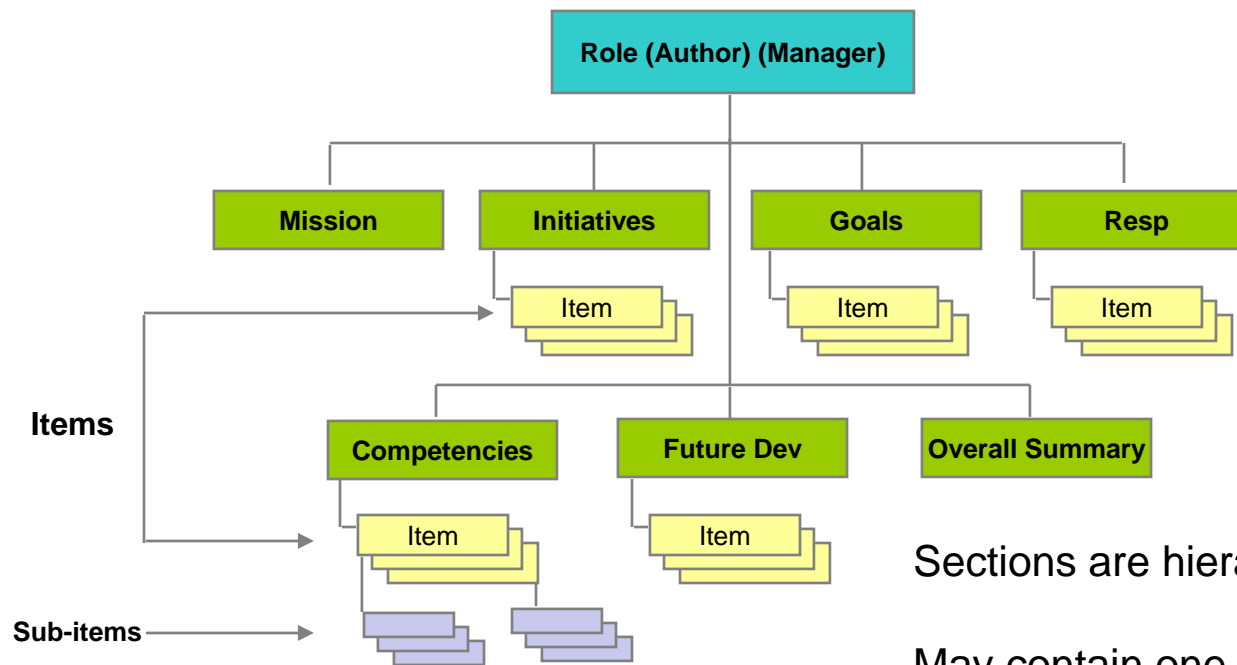
## Sections



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

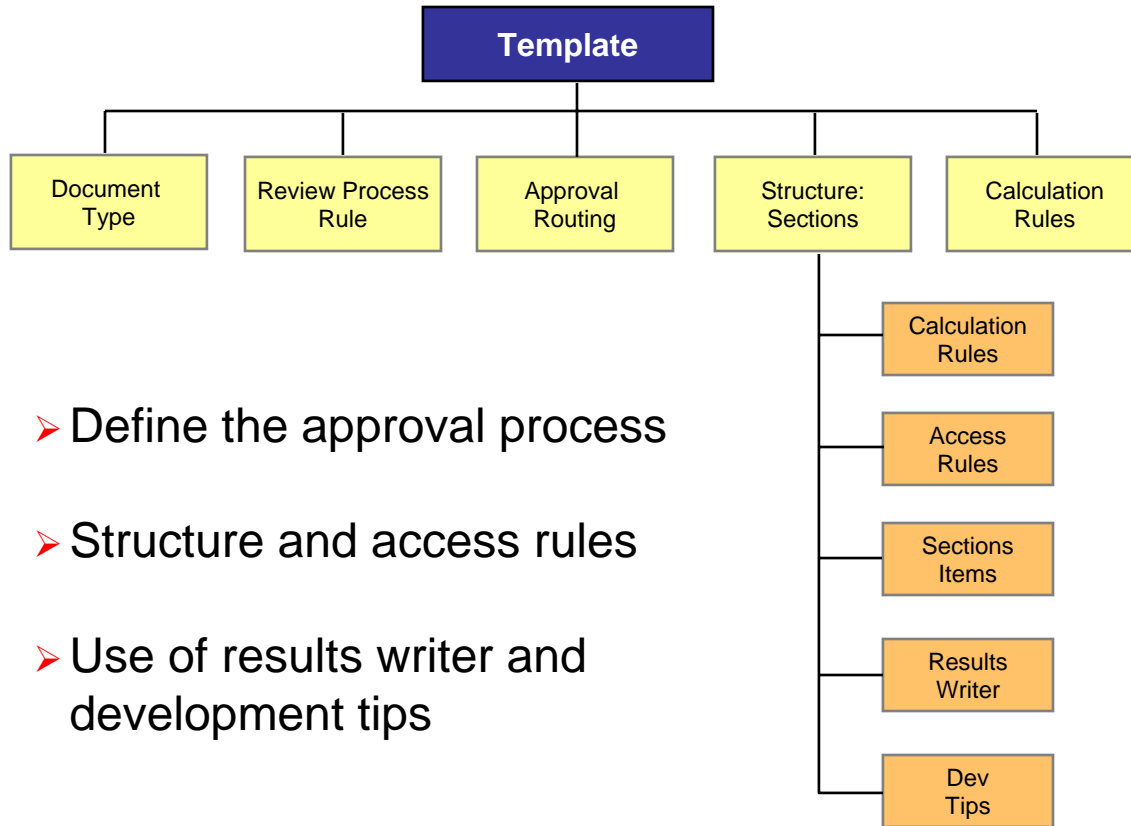
Prompt Table:

Results Writer: Not Used

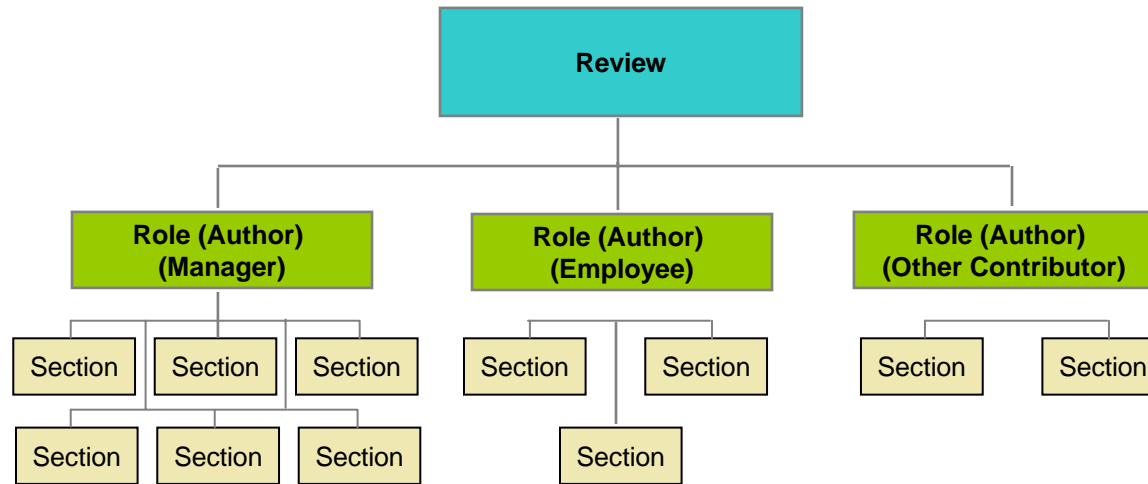
Development Tips: Not Used

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

## Templates



## 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

Evalu

- Routing and approvals
- Structure
- Access Rules

## Review Process and Approval Routings

### Approvals & Reviews

#### When?

##### Review Process

### 5 Options

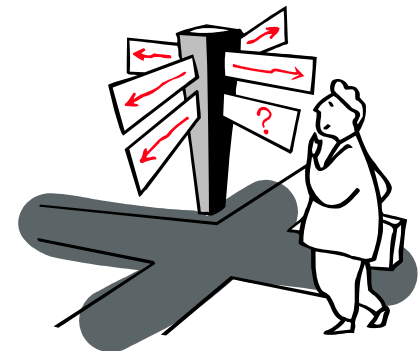
- Approval After Review Held
- Approval Before Review Held
- Approval No Review Held
- No Approval No Review Held
- No Approval Review Held

#### 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

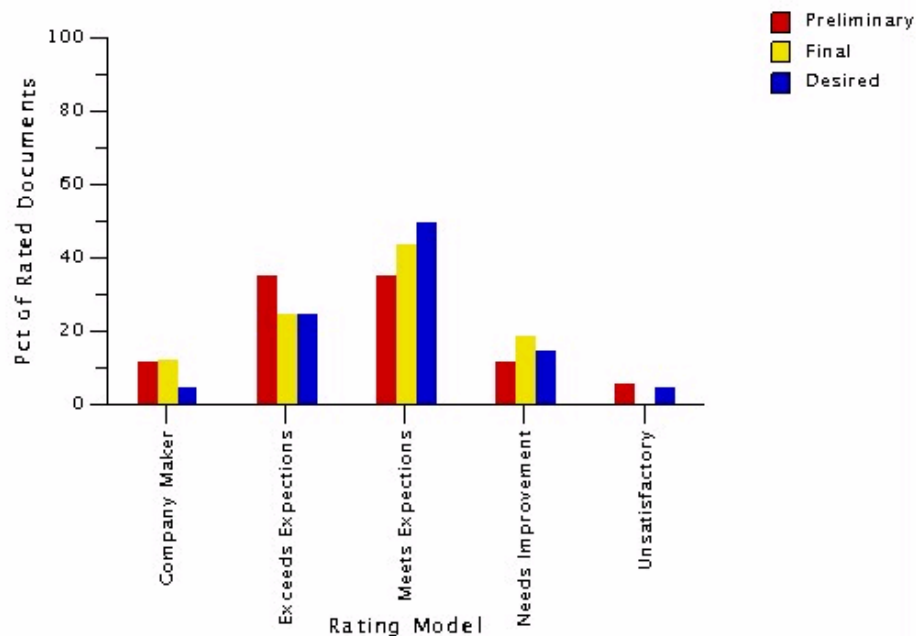
## Adviser Tools

- 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

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

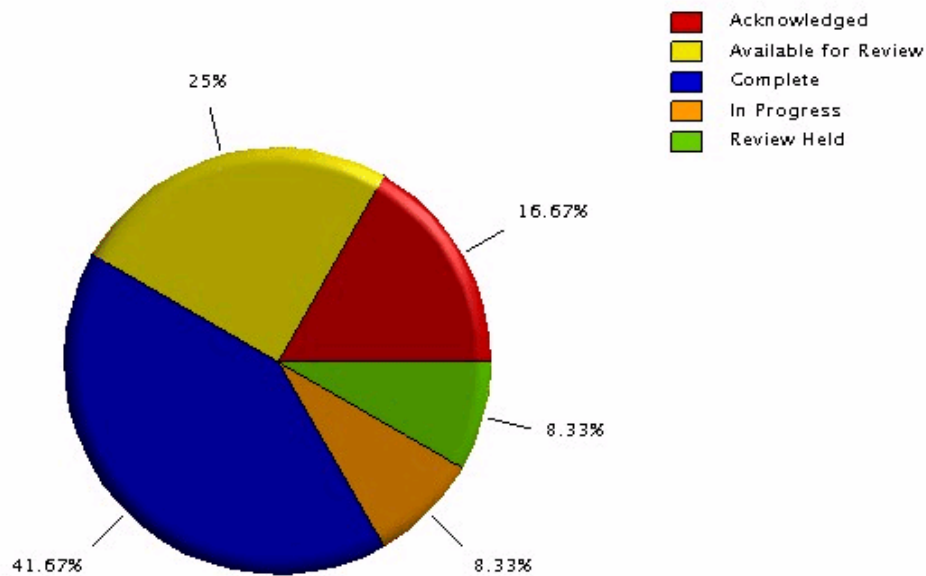


- Performance Rating Distribution shows preliminary, final and desired rating distribution
- Also drill down to see employees in each group

## Embedded Analytics

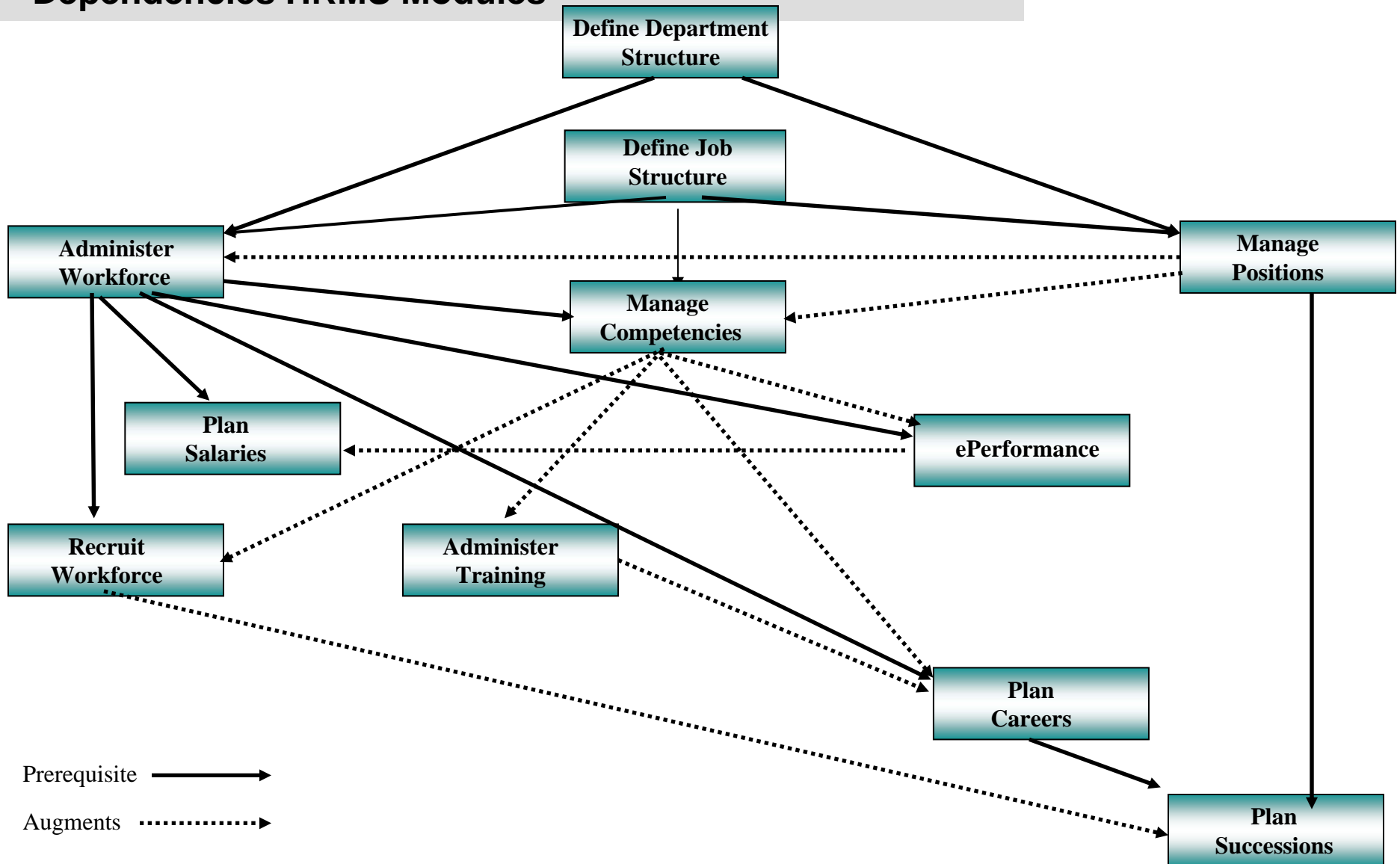
### Performance Status Summary

**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**

Selected Employees:

**Section 2 - Employee Goals**

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



Go to: **Manager Evaluation**

Document Details:  
Adland Chu, Clerk-Payroll Sr  
Document Description: 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](#)     [Notify](#)

➤ 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. Enter the Starting Date in the *Search Criteria* box, then click on the "Search" button.

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.

*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	





## Create Job Profiles

General Competencies Responsibilities Performance Templates Where Used

Job Profile: KUADMIN1

Job Profile Details

Effective Date: [ ]

Competencies

Competency
0200
0250
0501
0502

Job Profile: KUADMIN1

Job Profile Details

Effective Date: [ ]

Responsibilities

*Item ID
K0000008
K0000009
K0000010

Job Profile: KUADMIN1

Job Codes

SetID	Job Code	Description
SHARE	170005	Assistant-Administrative

Job Families

Job Family	Description
KADMIN	Administrative Support

Salary Grades

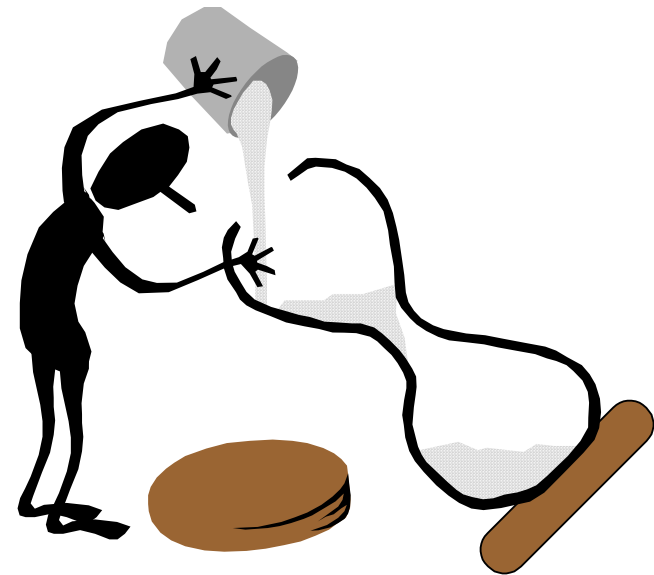
SetID	Sal Plan	Salary Grade	Description
-------	----------	--------------	-------------

Positions

Position Number	Description
19000018	Administrative Assistant

## 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

