



# PERFORMANCE MANAGEMENT SYSTEM

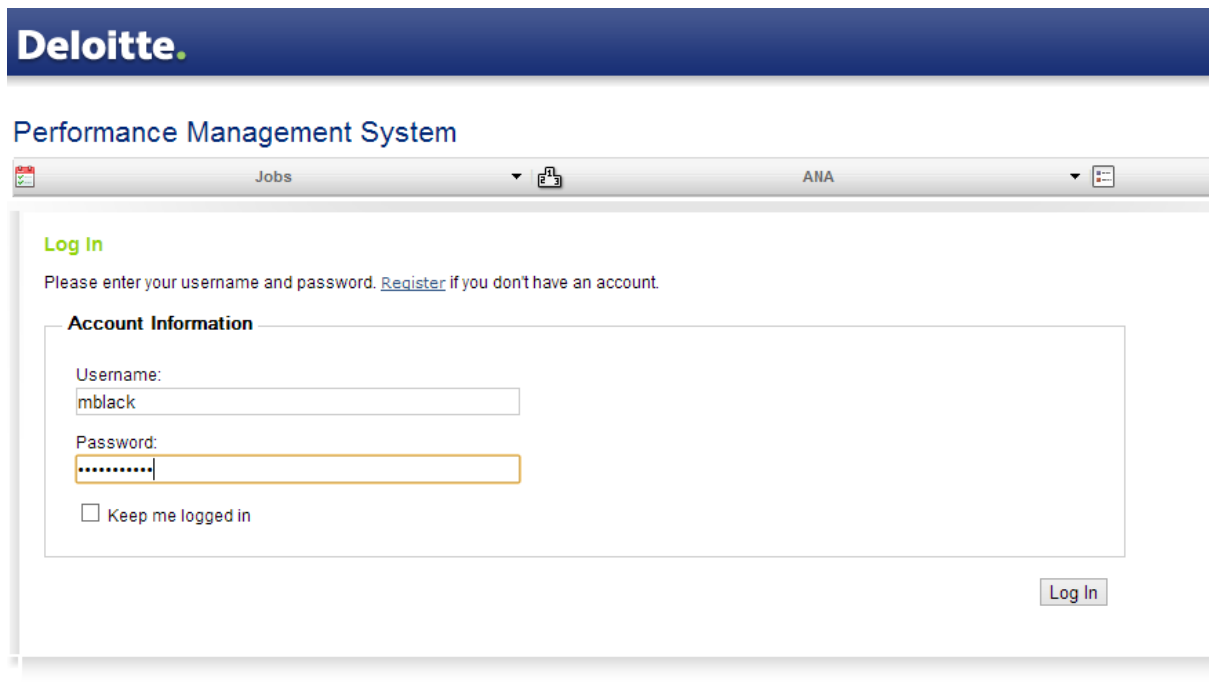
System Administrator User Manual

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## 1. Log in

Log into the system using your Deloitte user name and password and click “Log in”.



The screenshot shows the Deloitte Performance Management System login interface. At the top is a dark blue header with the Deloitte logo. Below it is a light blue banner with the text "Performance Management System". A navigation bar contains "Jobs" and "ANA" with dropdown arrows. The main content area is titled "Log In" in green. It includes a prompt to enter username and password, a "Register" link, and a "Log In" button. The "Account Information" section contains a "Username:" field with the text "mblack", a "Password:" field with masked characters, and a "Keep me logged in" checkbox.

**Deloitte.**

Performance Management System

Jobs ANA

**Log In**

Please enter your username and password. [Register](#) if you don't have an account.

**Account Information**

Username:  
mblack

Password:  
.....

☐ Keep me logged in

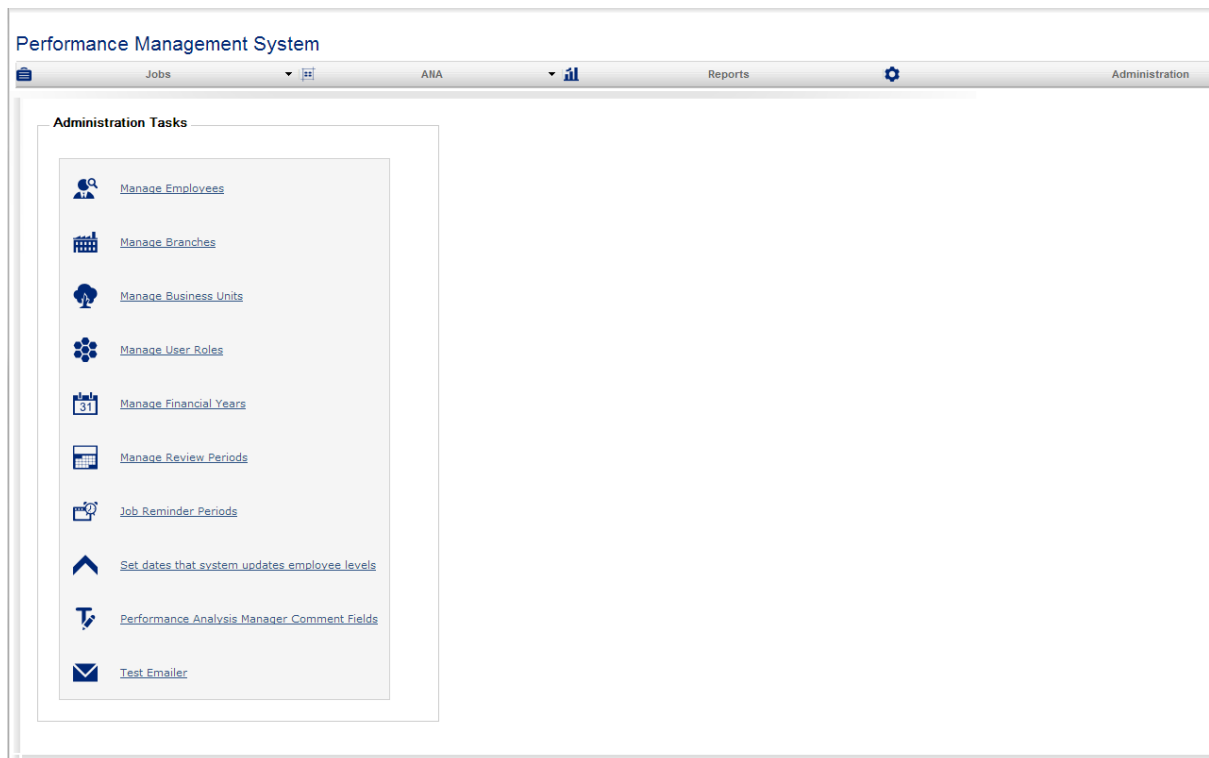
Log In

## 2. Open Administration Console

To open the administration console, click the “Administration” menu



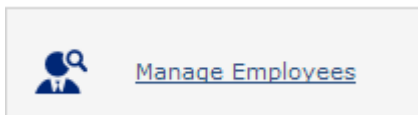
You will then be presented with a list of administrator tasks:



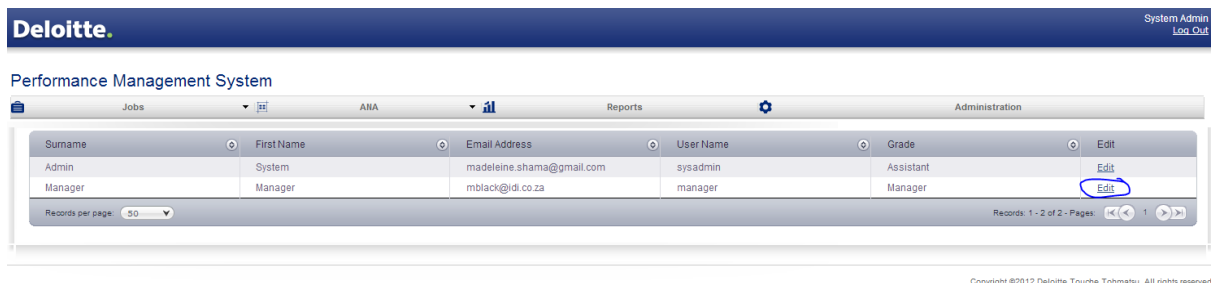
### 3. Manage Employees

To update any registered users details, click the “Manage employees” link. This will open a listing of all registered employees. Click the “Edit” button to the right of the employee you wish to edit:

#### Step 1:



#### Step 2:



#### Step 3:

Update the details and click “Save”

## Performance Management System



Jobs



ANA

**Edit an existing account.**

Use the form below to edit an existing account.

**Account Information**

User Name:

manager

E-mail:

manager@deloitte.co.za

First Name:

Manager

Last Name:

Manager

Staff Number:

123456

Level:

Manager

Sub Level:

Manager

Branch:

Deloitte WL

Group:

Acacia

Race:

AfricanBlack

Gender:

Female



SAICA Accredited?

Cancel

Save

#### 4. Manage Jobs

To update any registered users details, click the “Manage employees” link. This will open a listing of all registered employees. Click the “Edit” button to the right of the employee you wish to edit:

##### Step 1:



##### Step 2:

The view is populated with all jobs that are in the “Locked” status. To unlock, click the “Unlock” link to the right of the job.

⬇	Unlock	Clear PA	Clear PR
	<u>Unlock</u>	<u>Clear PA</u>	<u>Clear PR</u>
	<u>Unlock</u>	<u>Clear PA</u>	<u>Clear PR</u>

To clear the PA/ PR for a job, select the “All Jobs” radio button:



Locate the job you wish to clear the PA for and click “Clear PA” or “Clear PR”. **Note: Manager scores / comments and Trainee scores / comments will be deleted.**

Final Discussion	<u>Unlock</u>	<u>Clear PA</u>	<u>Clear PR</u>
Final Discussion	<u>Unlock</u>	<u>Clear PA</u>	<u>Clear PR</u>

## 5. Manage Branches

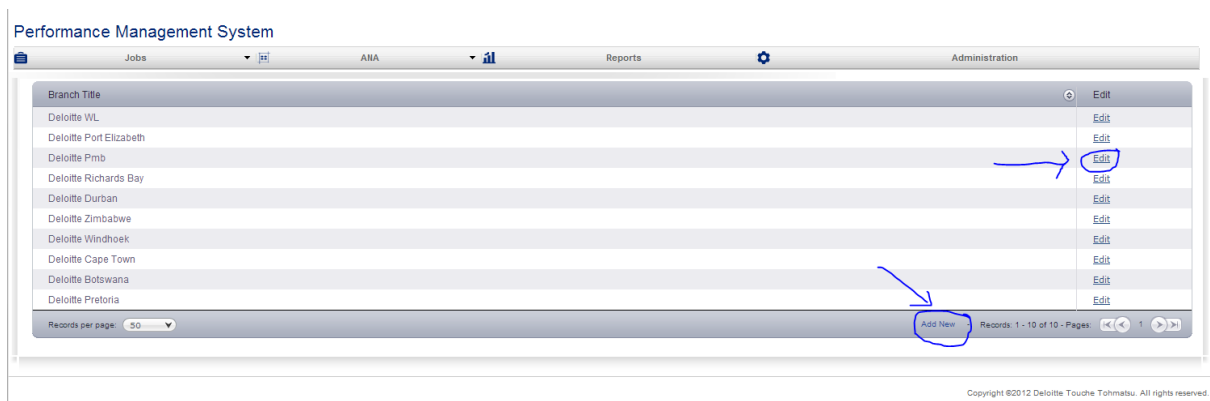
To update the list of branches or edit an existing branch name:

### Step 1:



### Step 2:

Add new, edit or delete an existing branch:



### Step 3:

Input details and click "Save".

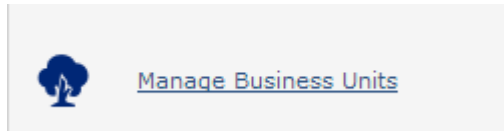
 A screenshot of the 'Branch Information' form. It features a text input field labeled 'Branch Name:'. Below the input field are two buttons: 'Cancel' and 'Save'.



## 6. Manage Business Units

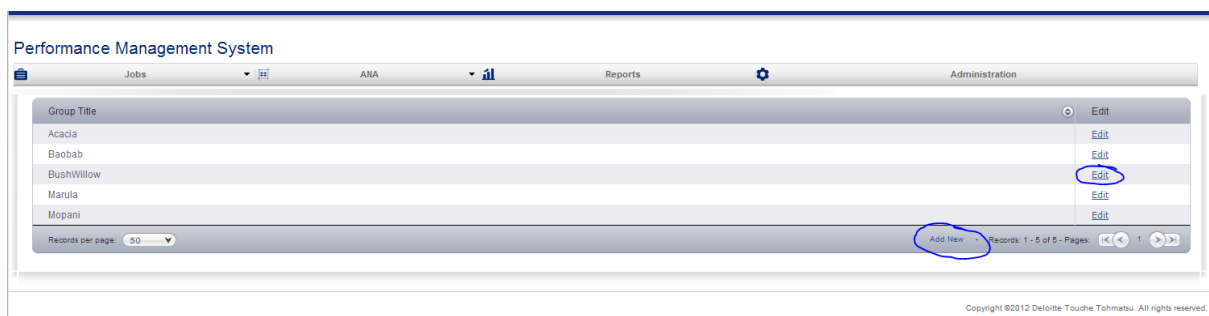
To update the list of business units or edit an existing business unit name:

### Step 1:



### Step 2:

Add new, edit or delete an existing business unit:

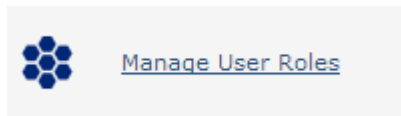


### Step 3:

Input details and click "Save".

## 7. Manage User Roles

### Step 1:



### Step 2:

Add new, edit or delete an existing user role:



### Step 3:

#### Group Information

Role Name:

#### Can access reports for groups:


Acacia	<input type="checkbox"/>
Baobab	<input checked="" type="checkbox"/>
BushWillow	<input type="checkbox"/>
Marula	<input type="checkbox"/>
Mopani	<input type="checkbox"/>

#### Members:

Add Resource

Employee Name	
System Admin	

Cancel
Save

1. Enter a name for the role.
2. Check the boxes next to the business units where the members of this role will be allowed to draw up reports for.
3. Add members to the group by clicking the “Add Resource” button.
4. Remove members by clicking the  button next to the member name
5. Click “Save”

**Note: A user can belong to multiple roles – they will receive permissions from all roles combined.**

## 8. Manage Financial Years

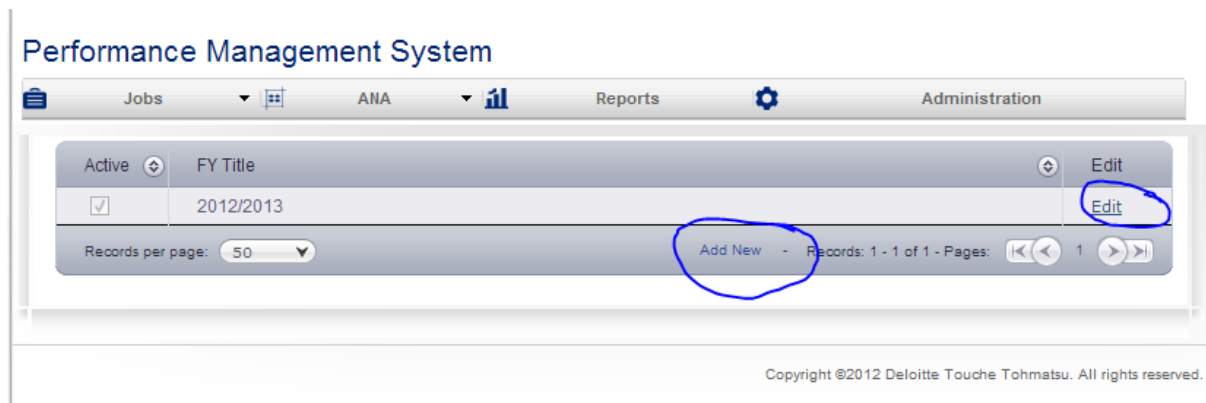
To update the list of Financial Years or edit an existing Financial Year:

### Step 1:



### Step 2:

Add new, edit or delete an existing financial year:



### Step 3:

Input details and click "Save".

**Note:** there can only be one active Financial Year at a time. If you check "Active" and save, the other active financial year will be deactivated.

## 9. Manage Review Periods

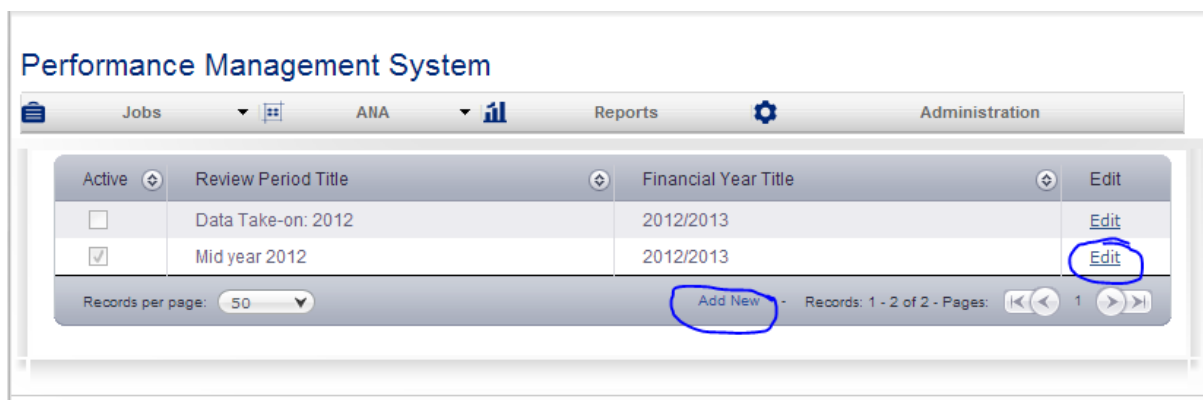
To update the list of Review Periods or edit an existing Review Period:

### Step 1:



### Step 2:

Add new, edit or delete an existing review period:



### Step 3:

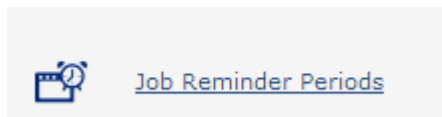
Input details and click "Save".

**Note:** there can only be one active Review Period at a time. If you check "Active" and save, the other active Review Period will be deactivated.

## 10. Manage Job Reminder Periods

The system automatically sends three reminders to trainees to update their PA/PR for each assignment. To set the intervals of these reminders:

### Step 1:



### Step 2:

Set the number of days for each reminder (first reminder period should be notification 1)

 A screenshot of the 'Performance Management System' interface. The top navigation bar includes 'Jobs', 'ANA', 'Reports', and 'Administration'. The 'Administration' section is active, showing a 'Settings' dialog box. The dialog box contains three rows for notification intervals: 'Notification 1: 14 Days', 'Notification 2: 10 Days', and 'Notification 3: 1 Days'. Each row has a text input field for the number of days and a dropdown menu set to 'Days'. At the bottom of the dialog are 'Cancel' and 'Save' buttons. The footer of the page reads 'Copyright ©2012 Deloitte Touche Tohmatsu. All rights reserved'.

### Step 3:

“Save”.

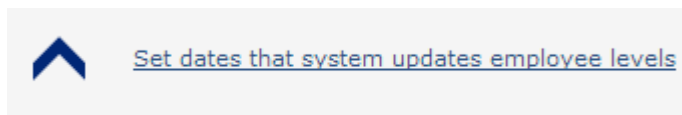
## 11. Set Employee Level Update Periods

Twice a year the system will automatically increment (raise) the level (grade) of each trainee.

To manage the dates that this automated task will occur:

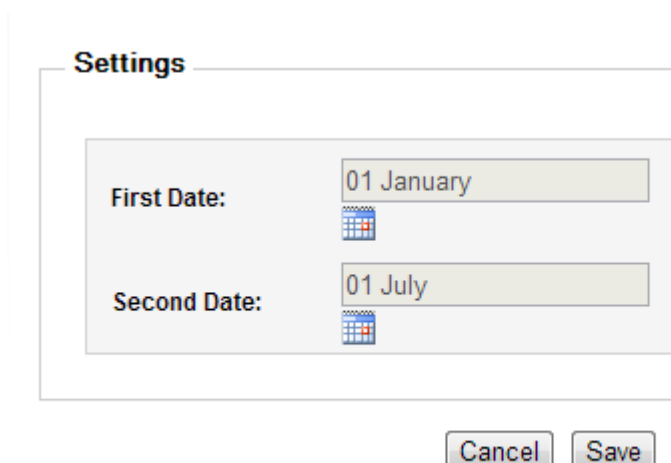
The system automatically sends three reminders to trainees to update their PA/PR for each assignment. To set the intervals of these reminders:

### Step 1:



### Step 2:

Select the first date and second date by clicking the calendar buttons (note: the year selected does not matter, it is just the day and month that get saved)



**Settings**

First Date: 01 January

Second Date: 01 July

Cancel Save

### Step 3:

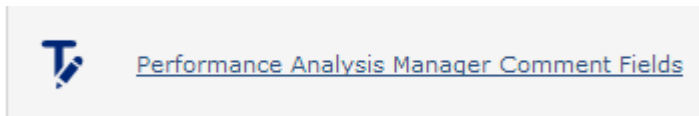
“Save”.

## 12. Performance Analysis Manager Comment Fields

The fields that are available for managers to comment in in the PA sections are configurable.

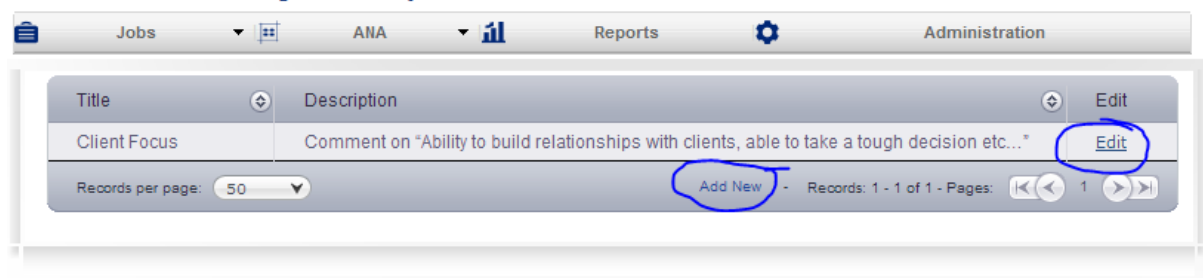
To set up the fields available for comment:

### Step 1:



### Step 2:

Add new, edit or delete an existing manager comment text box:



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### Step 3:

Add a title for the comment (Displayed in reports) and a description (text to guide the manager as to what to write in this section). Click “save”.



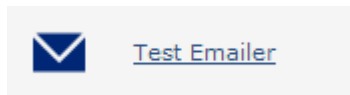
**Field Information**

<b>Text Box Title:</b>	Client Focus
<b>Text Box Description:</b>	Comment on "Ability to build relationships with clients, able to take a tough decision etc..."

### 13. Test Emailer

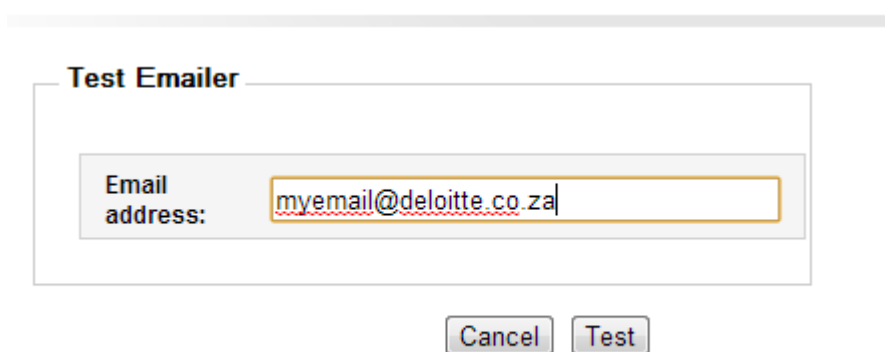
To send out a test email from the system:

**Step 1:**



**Step 2:**

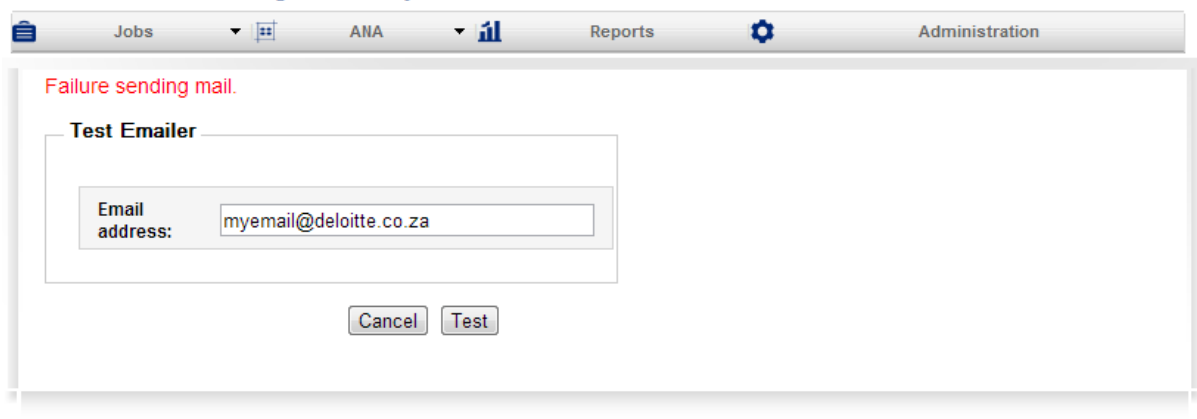
Your email address will be populated in the Email Address text box. Change this address if you want to test another email address.

A screenshot of the "Test Emailer" dialog box. It contains a text input field labeled "Email address:" with the value "myemail@deloitte.co.za" entered. Below the input field are two buttons: "Cancel" and "Test".

**Step 3:**

Click "Test". If any errors occur you will see an error message:

#### Performance Management System

A screenshot of the "Performance Management System" interface. At the top, there is a navigation bar with links: "Jobs", "ANA", "Reports", and "Administration". Below the navigation bar, a red error message "Failure sending mail." is displayed. Below the error message, the "Test Emailer" dialog box is shown, with the "Email address:" field containing "myemail@deloitte.co.za" and "Cancel" and "Test" buttons.

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Further detail as to the error message can be obtained from the system log file.