

Performance Management Review Dates in SAP

User Guide

1.1. Introduction

This module of SAP provides for the local entry of performance management (PMS) review dates, the names of supervisors and the execution of performance management reports. It provides organisational units with direct and timely access to status information about performance management to assist planning in their areas.

This PMS SAP module will provide the annual compliance reporting mechanism for the University.

The data entry facility and reports will be available to staff members nominated by their organisational units. Appropriate SAP security access will be required. This is obtained via the new SAP Access forms located at <http://adm.monash.edu/sss/forms/>

Three reports are available:

1. Eligibility report – used to identify all staff eligible to participate in performance management.
2. Status report – used to provide the current status of the performance management process within the organisational unit/s.
3. Summary report – overall summary table of status of performance management within the organisational unit/s.

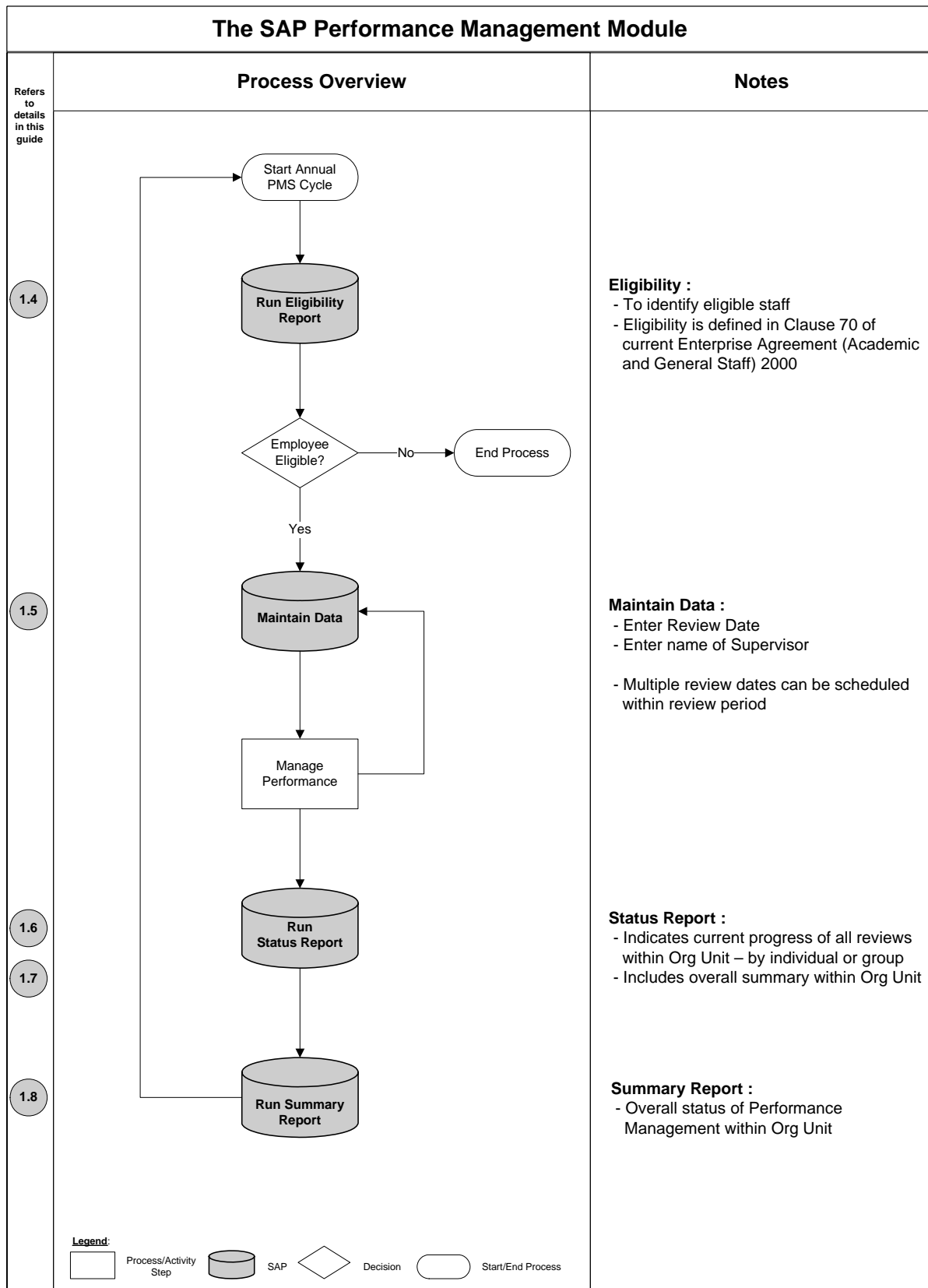
The Human Resources Division will use the summary report to provide the University with an overall rate of annual compliance with breakdowns to faculty/divisional level.

1.2. Overview of Performance Management Module

To use the system there are four functions:

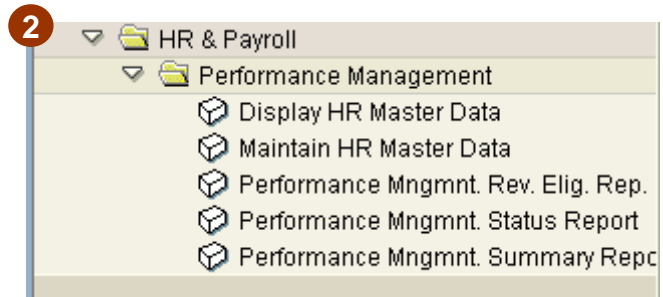
1. Eligibility report
 - a. To identify eligible staff from a specified date
 - b. Can be run for any date
 - c. Includes a summary option
2. Maintain data
 - a. To enter review date and name of supervisor
 - b. Can be done on completion of performance review or once scheduled
 - c. Multiple review dates can be scheduled for any review period
3. Status report
 - a. To show current progress of reviews undertaken within the organisational unit
 - b. Can specify any date for execution of report
 - c. Report also includes summary option showing overall status
4. Summary report
 - a. To summarise the overall compliance of performance management at organisational level or university wide

The process overview below refers to the four Performance Management functions as they are described in more detail in this guide.




1.3. Login Procedure

1	Login to SAP using the SAPlogon Pad
2	Select HR & Payroll Select Performance Management <i>Functions available for performance management will display.</i>



1.4. Executing an Eligibility report


1	Double click on Performance Mngmnt Rev.Elig.Rep
2	<i>To execute a report for a selected organisational unit</i> Select the appropriate org unit from Org.Structure
3	Update the reference date field with nominated date Select Prior Year or Future Year Verify Employee Group and Employee Subgroup
4	Update Classifications group if required. Default is set to staff members eligible to participate. (Refer EB) Select one for the available options for Employee Type
5	Download is set as a default
6	Select Execute  or F8 to run the report

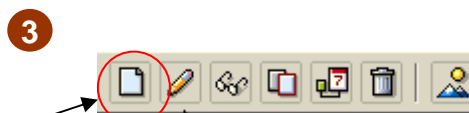
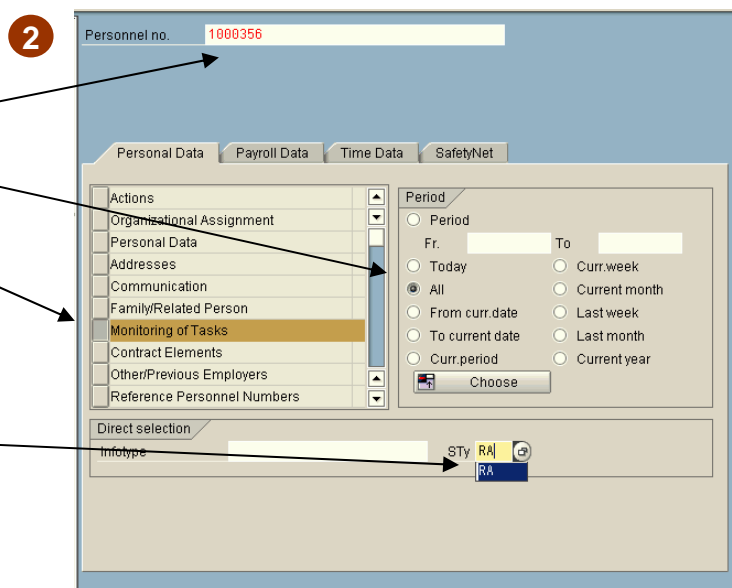
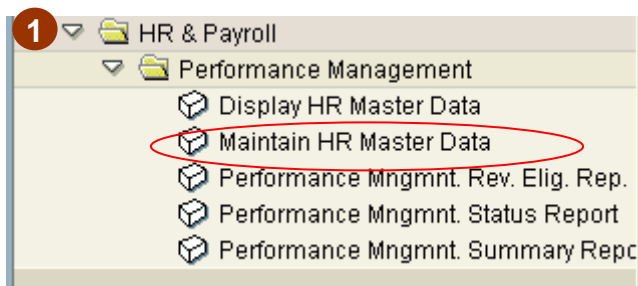
The screenshot shows the SAP Performance Management Review Eligibility Report interface. It is divided into several sections:


- 1:** A tree view under 'HR & Payroll' > 'Performance Management' with 'Performance Mngmnt. Rev. Elig. Rep.' circled in red.
- 2:** The main report title 'Performance Mngmnt. Review Eligibility Report' and the 'Org. structure' button in the top right, circled in red.
- 3:** The 'Date / Period and Other Selections' section, showing 'Reference Date' as 08.11.2004 and 'Prior Year' selected.
- 4:** The 'Performance Mngmnt. Eligibility Selection Criteria' section, showing 'Classifications' as HEW 05 to HEW 09 and 'Employee Type' as Academic & General selected.
- 5:** The 'Download Option' section, showing 'Download Required?' checked and 'File name' as PerfElig.xls.

1.5. Maintain Data

1.5.1. Create a performance review record



1	<p>Double click on Maintain HR Master Data</p>
2	<p>Enter Personnel no. Under Period select All Select Monitoring of Tasks</p> <p>Set Sty to RA (academic staff) or RG (general staff)</p> <p>Press Enter</p>
3	<p>The screen will be updated with the relevant details of the nominated staff member</p> <p>Click Create  or (F5)</p>

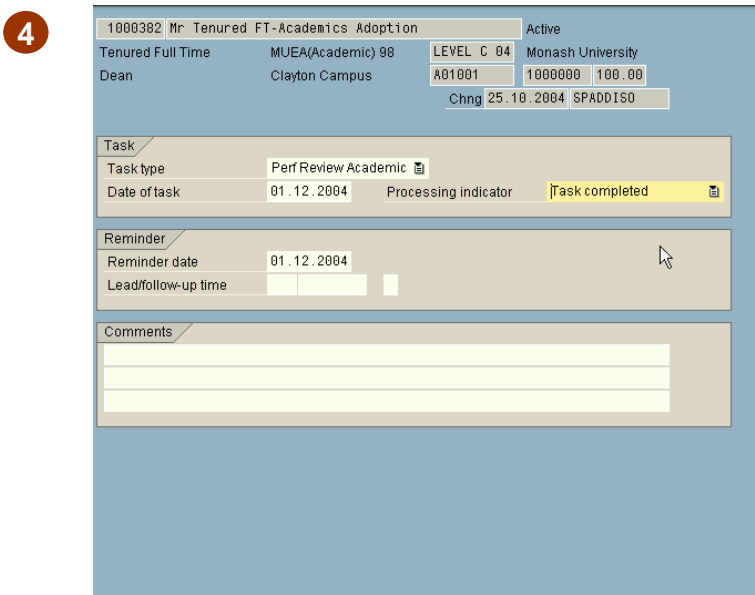
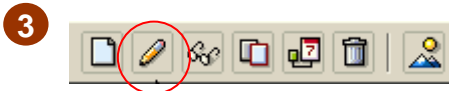
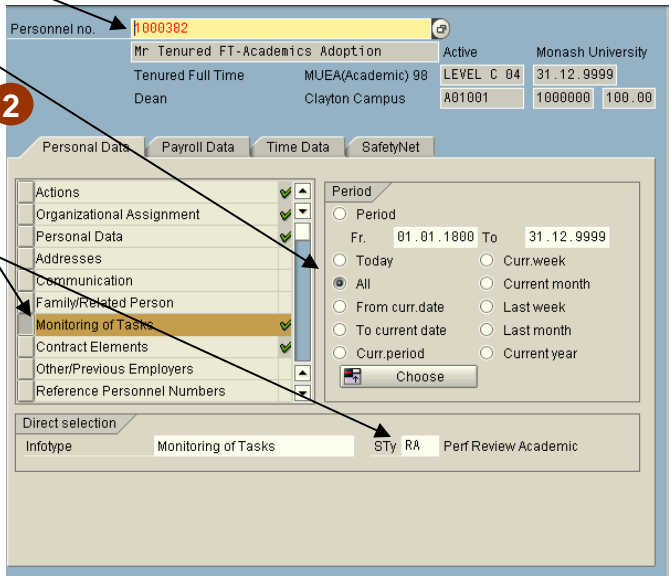
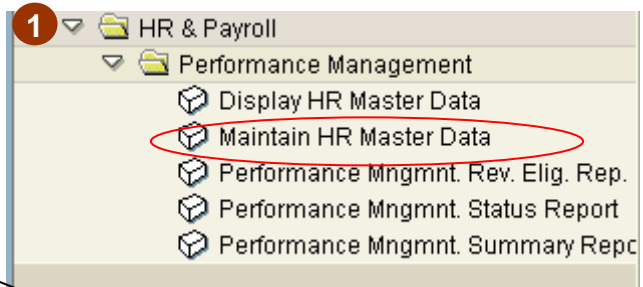


Adding Review dates	
4	<p>Enter Date of Task</p> <p>Set Processing Indicator to Task in process or Task completed</p> <p>Notes:</p> <p><i>If task in process has been nominated then this must be manually updated in Maintain Master data to Task completed when required.</i></p> <p><i>Reminder dates can be entered as a permanent record but will not appear in any reports.</i></p>
5	<p>Enter the name of the supervisor in the format of Title First name Last name on the first line of the Comments section.</p> <p>No other comments should be entered.</p> <p><i>The name of the supervisor will appear in the Status report.</i></p>
6	<p>Click Save  or (Ctrl S)</p>

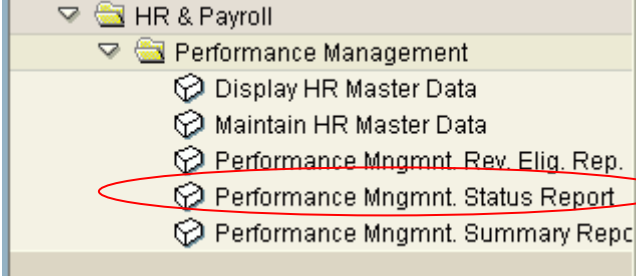
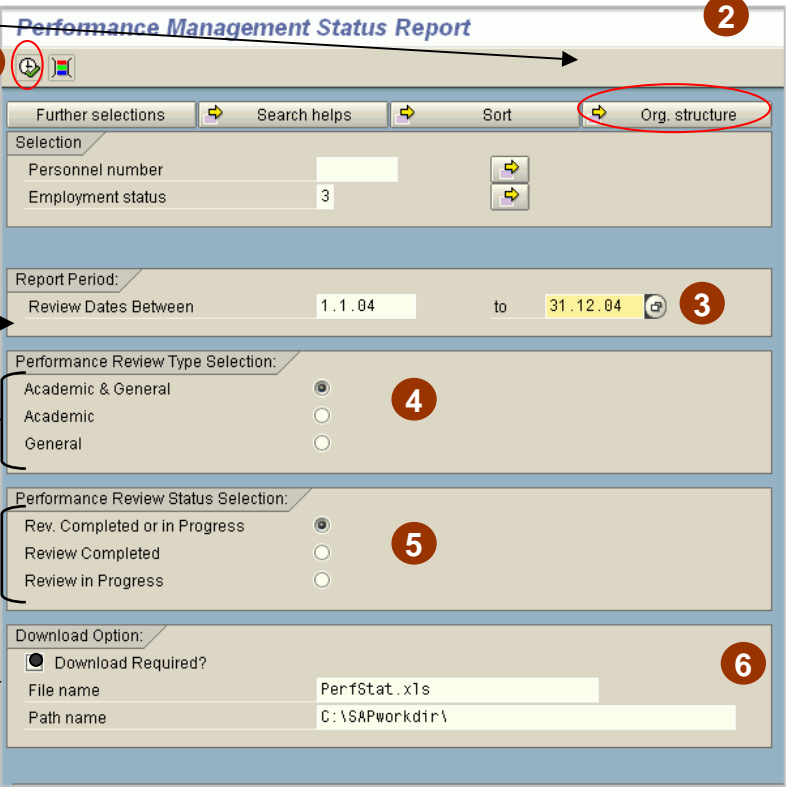



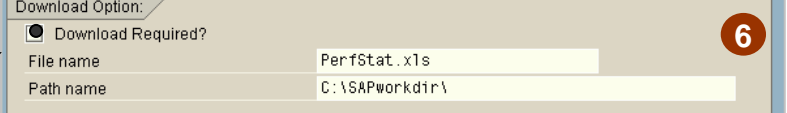


The screenshot shows the SAP Performance Management interface for Miss Heidi Brown. It includes fields for 'Task type' (Perf Review Academic), 'Date of task' (31.10.04), and 'Processing indicator' (Task completed). The 'Comments' section contains the text 'Professor Nelly Smith'. Red circles with numbers 4 and 5 indicate the steps described in the table. Arrows point from the table to these specific elements in the screenshot.

1.5.2.Updating a performance review record

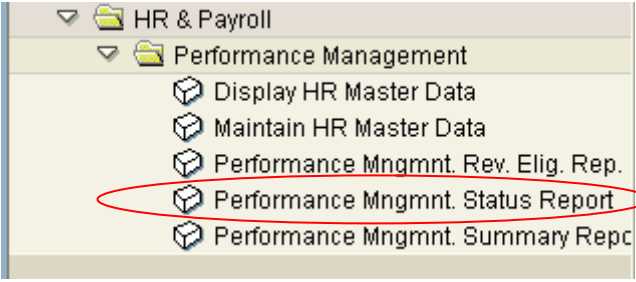
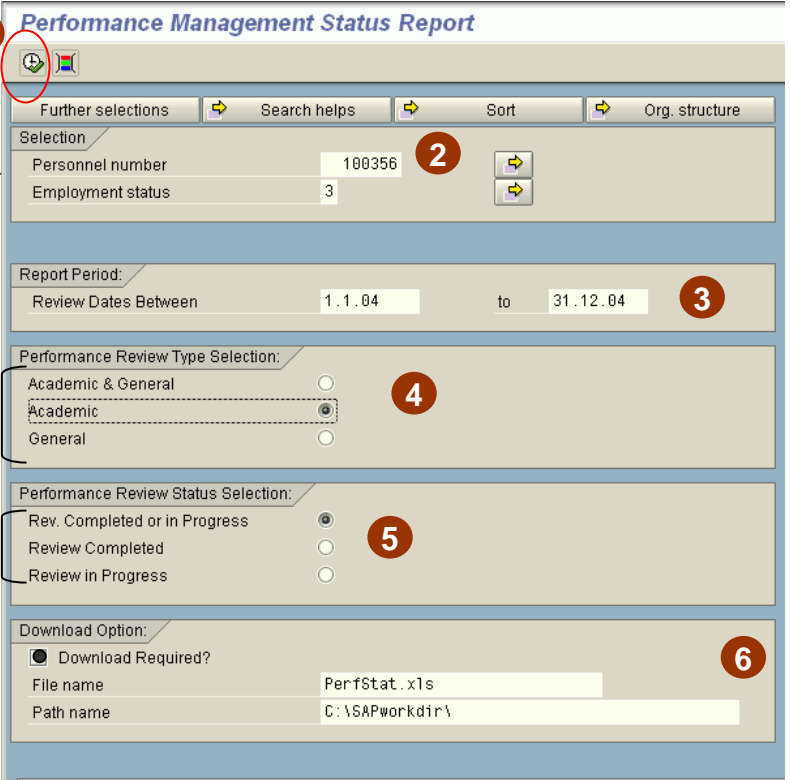

1	Double click on Maintain HR Master Data
2	Enter Personnel no. Under Period select All Select Monitoring of Tasks Set Sty to RA (academic staff) or RG (general staff) Press Enter
3	The screen will be updated with the relevant details of the nominated staff member. Click Change  or (F6)
4	Make the required changes
5	Click Save  or (Ctrl S)




1.6. Executing a status report for an organisational unit

1	Double click Performance Mngmnt Status Report	
2	To execute a report for a selected organisational unit Select the appropriate org unit from Org.Structure	
3	Enter the Dates for the review period	
4	Select an option under Performance Review Type Selection	
5	Select an option under Performance Review Status Selection	
6	Download is set as a default	
7	Select Execute  or F8 to run the report	

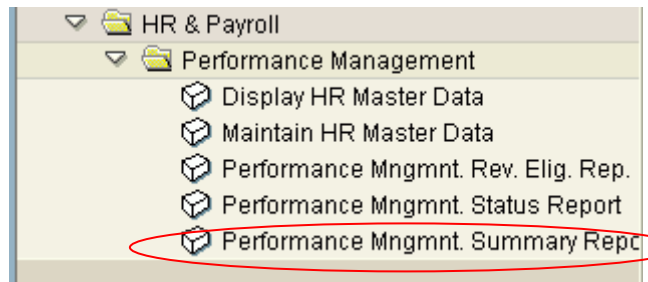
1.7. Executing a status report for a staff member history

<p>1</p>	<p>Double click Performance Mngmnt Status Report</p>	
<p>2</p>	<p>Enter the Personnel number of the staff member</p>	
<p>3</p>	<p>Enter the Dates for the review period</p>	
<p>4</p>	<p>Select an option under Performance Review Type Selection</p>	
<p>5</p>	<p>Select an option under Performance Review Status Selection</p>	
<p>6</p>	<p>Download is set as a default</p>	
<p>7</p>	<p>Select Execute  or F8 to run the report</p>	

1.8. Execute a summary report

1	<p>Double click Performance Mngmnt Summary Report</p>
2	<p>To execute a report for a selected organisational unit</p> <p>Select the appropriate org unit from Org.Structure</p>
2	<p>Verify accuracy of the following fields:</p> <ul style="list-style-type: none"> -Eligible Staff as at Date (will report for the preceding 12 months) - Employee Group - Employee Subgroup - Classifications
3	<p>Download is set as a default</p>
4	<p>Select Execute  or F8 to run the report</p>

1



2

