

JobTRACK® System

Quick Reference Guide

Home Page | My Reviews Rolling-12 Dashboard

Your reviews for the past 12 months will be displayed in a dashboard format on the home page when you login. The top half shows reviews found on file for each Person in a Work Group, and the bottom half shows multiple Work Groups if applicable.

The dashboard will reflect the number of months out of the past 12 with a review on file. Whether your target is monthly, quarterly or annual reviews, this can be a valuable way to track which reviews are on file for which People.

Organization Options

- Click the pencil icon to edit your Organization Options.
- **JobTRACK Header Text** is where you can specify any wording you would like to have printed above your JobTRACK Key Results Areas and Critical Tasks. An example: *"All Key Results Areas (KRAs) will be performed in ways that benefit all key stakeholder groups consistent with and supportive of our company's Mission and Values."*
- **JobTRACK Footer Text** is designed to allow you to add any other company-specific wording to the bottom of all of your JobTRACKS.
- **Default Job Sort** sets the sort order for KRAs and CTs on JobTRACK and Review Reports.
- **Enable Top Choice Coaching** allows you to control whether the Edit Person page will display a button to add a new Top Choice Coaching tool. This worksheet is designed to help the manager create a development plan for a new hire. If your organization chooses not to use this functionality, you may turn it off with this setting.
- **Review Scale** lets you configure your scale for all reviews within the system.

The scale can only be changed before you begin entering reviews. Once you have reviews on file, you can View the scale, but no longer edit it.

If you wish to change your review scale with reviews on file, contact the Help Desk; we can create a copy of your Organization so you can configure a different review scale while keeping your existing data on file as an archive for future reference.

Click Setup to configure your desired review scale.

- **Insert Default Scale:** There are three scales developed by NCM available as defaults. You can use any of those, or use them as a starting point and edit from there.
- **Review Scale # of Points (3-10):** Choose the number of points on your scale between 3 and 10.
- **Begins with:** Choose either 0 or 1 as the beginning point on your scale and the grid below will be populated with the point numbers. Default = 1.

Example: 5-point scale, begins with 1, your points will be 1, 2, 3, 4, 5. If you choose a 5-point scale, begins with 0, your points will be 0, 1, 2, 3, 4.
- **Scale Configuration | Description:** Enter the description you want for each point on the scale. It is recommended that your descriptions be short.
- **Scale Configuration | Development Guide:** There are two Development Guide reports within the system, with four static rows that display review results. Indicate on which of the four rows each point should be included. *Note that lower points on the scale must be included in a lower row on this report.*
- **Scale Configuration | Development Guide:** There are two Development Guide reports within the system, with four static rows that display review results. These reports are the Critical Tasks Development Guide and the Values Alignment Development Guide. Indicate

on which of the four rows each point should be included. *Note that lower points on the scale must be included in a lower row on this report. In other words, lower numerical values must correspond to lower performance levels.*

- **Scale Configuration | Coaching Tool:** There are three Performance Management Coaching Tool reports within the system, with four static color codes that display review results (red=danger, yellow=caution, green=good, blue=great). Indicate to which of the four colors each point should correspond. *Note that lower points on the scale must correspond to "lower" colors on the report. In other words, lower numerical values must correspond to lower performance levels.*
- **Scale Configuration | Prompt for Action Plan?** As Reviewers are entering review scores, an Action Plan may be configured for any score; however, you can request that the system prompt/remind users to consider creating action plans for specific (usually lower) scores. Indicate with a check-mark which scores you would like to have the system prompt for action plans. The reviewer can answer Yes or No each time the prompt appears. *Action Plan prompts would typically be configured for only the lowest scores on the scale.*
- **Action Plan Labels:** When your organization creates plans for improved performance related to any Review, you can choose how these plans are labeled within the JobTRACK System.
 - **Full Name:** Specify the full name you would like to have appear at the top of your Plans. *Default = Performance Improvement Action Plan.*
 - **Short Name:** Specify the shorter name to display throughout the system. *Default = Action Plan.*
 - **Letter:** Specify the single letter to be shown when an Action Plan is signaled on a report. *Default = A.*
- **Upload Logo:** Upload your company **Logo** using the Browse button to navigate to your logo file. Logos appear at the top of all printed reports and in the system header, in a space that is 96 x 96 pixels in size (approximately 1" square). If your logo has different dimensions, it

will be reduced in size to fit the space allowed.

- Specify your company's **Departments** using the grid control provided. You can allow others to have access to the JobTRACK System based on department rights; if you wish to limit rights for other users, consider configuring the departments accordingly. For example, if you have multiple locations, you may wish to set up a Department for each Location/Department combination so you can provide access to the JobTRACK System for just a location to that location's general manager.
- If you have Core Business **Values** identified for your company, you can configure them into the JobTRACK System using this grid control. Each Value can additionally have multiple "Actions" defined below it. The JobTRACK System provides a convenient method of completing a Values Alignment Review for each employee to evaluate their level of match with the company's values.

Setup | Users

If you are the Administrator for your organization's JobTRACK® System, you will have the ability to add Users. Only Supervisors ("Reviewers") need to be configured as users. Employees ("Performers") will not require a user account to access their own self reviews on the system.

- **First Name:** Specify the Reviewer's first name.
- **Last Name:** Specify the Reviewer's last name.
- **Organization:** *Will be filled in with your Organization.*
- **Email Address:** Provide this user's email address. The user will be configured and an email will be sent to them allowing them to specify their own password.
- **Portal User ID:** As each user is configured on the Client Portal, their portal ID will be filled in here automatically.
- **Options Menu:** Indicate whether or not you wish this user to have access to Organization Options on the system.
- **Jobs Menu:** Indicate whether or not this user should have access to adding, changing, delete Jobs for your organization.

- **Departments:** Check one or more department(s) for which this user should have access for editing People and Reviews.

*Note: If you wish to have additional **Administrator Users** set up, please contact the Help Desk.*

Jobs

The Jobs menu allows you to access any Jobs (or Jobs Libraries) you have purchased from NCM, or you can configure your own jobs here.

If you have purchased jobs from an NCM Library, we recommend you begin by "Cloning" the job to make a copy (keeping the original unchanged). Click on the Clone icon next to the job name, and then make modifications to tweak the job for your company.

Jobs consist of these components:

- **Active:** If a Job is no longer in use, indicate No here. Job Performance Reviews that may be on file using this Job will still work correctly, but no new People may be assigned to this Job. Use the checkbox on the grid to view or hide inactive Jobs.
- **Job Name:** Description of the job. The job name must be unique within the same Library.
- **Library:** You may have access to a Library purchased from NCM, or you will also have a private library for your company's jobs. If you are Cloning an NCM job, you would typically leave the Job Name the same, and modify the Library to be your company's private library, then make your other modifications from there.
- **Critical:** Most companies can select a few Jobs that would be considered critical to be filled with a good-fit performer. Answer Yes for those Jobs so you can easily find those jobs on the Jobs grid.
- **Job Revision Date:** Use this field to track when a Job was last materially changed. This field does not update automatically so you can make minor changes without affecting the revision date.
- **Key Results Areas:** Configure the three to five results for which this job was created. Think in terms of the end product – what are

the results you are looking for from a high performer in this job. Most jobs have two or three KRAs, only the more complex, higher-level jobs usually need four or five.

- **Library Expanded** shows the Key Results Areas Library with all existing KRAs on file for your company. You may find the KRA you want, or one that is close as a starting point. If you select a KRA from the Library, you will overwrite any other KRA Description you have typed in.
- **Critical Tasks:** For each KRA, describe how the job is done by listing the Critical Tasks. Each Critical Task is also assigned an Impact Percentage. The sum of all CT Impact Percentages for a job should be 100%. It is recommended that no two CTs have the same Impact Percentage. The sum of the CTs below each KRA are displayed with the KRA.
 - **Library Expanded** shows the Critical Tasks Library with all existing Critical Tasks on file for your company. You may find the CT you want, or one that is close as a starting point. If you select a CT from the Library, you will overwrite any other CT Description you have typed in.

Many people benefit from SBM consulting services when configuring their own KRAs and CTs – consider contacting SBM for a phone consultation as short as 60 minutes, or for more in-depth work configuring your jobs.

- ✓ **Print JobTRACK:** Print the JobTRACK job description to provide to candidates or job holders.
- ✓ **Print Critical Tasks Analysis.** Print this report to help clearly communicate those tasks that are most important for high performance in this job.

People

This component of the JobTRACK System helps you conduct reviews for your employees (Job Performance and also Values Alignment Reviews). You can also track several other types of non-review activities such as Action Plans with Progress Checks, Notes, and Top Choice coaching plans for new performers in a role.

Start by configuring each employee and assigning them to one or multiple jobs. You can input People manually, or upload them in batches from a CSV file (see below).

People consist of these components:

- **First and Last Name**
- **Email Address:** Input the employee's email address if you wish to send self review or other automated emails from the system. You cannot use the same email address for more than one person.
- **Active?** When you purchase the JobTRACK System, you specify how many people you would like to manage. If employees leave the company, you can keep their employment records in the system, but not have those people count toward your subscription maximum. You can still access Inactive people to view their activity, but a person must be marked Active to complete a Review or other Activity types for them.
- **Organization** will have drop down list if you have more than one.
- **Department:** Specify the department for which this person works. Note that user rights in the system are controlled by Department, so you should consider configuring your departments to match users for whom you wish to define limited rights (such as department managers and even department managers at a specific location).
- **Assign Jobs:** Select one or multiple jobs for this person. If a person is no longer performing a previous job, you can remove that job without losing reviews on file for that job.
- **Print Individual Performance Management Coaching Tool:** This report displays each review for the person during the past 12 months as a separate row, allowing the manager to evaluate performance changes over time. It shows the score for each KRA, each CT, and an overall Values Alignment score on the right.

Upload People

If you have several People to add, you can create a CSV file to upload an unlimited number of People at one time. Here is the file layout required:

- Column A: First name

- Column B: Last Name
- Column C: Email Address
- Column D: Department

This file can be created in Excel and then choose Save As to CSV format.

Notes:

- ✓ First Name / Last Name / Department must be unique
- ✓ Department must exactly match a Department that is on file
- ✓ Email address must be unique

Activities Grid

There are five types of Activities that can be added for any person in the JobTRACK® System. You can click the button to add any of these activity types, and you can check/un-check the boxes to view each activity type.

- ✓ **Job Performance Review:** If a person has more than one Job configured, you'll be prompted to select the job this review applies to. There is an option to print the blank review to use as a worksheet for the reviewer and/or the performer to record their scores.

All Job Performance Reviews would include the Reviewer's (or Manager/Supervisor's) viewpoint. Optionally, you can also send a Self-Review link to the Performer to rate their own performance.

- ✓ **Values Alignment Review:** Similar to Job Performance Reviews, this activity is designed for the Reviewer (and optionally also the Performer) to rank this person's alignment with each of the key actions under the company's core values. These values are configured under Organization Options.

- ✓ **Action Plan:** An action plan can be created as a Job Performance or Values Alignment Review is input. Configure the scores you believe are low for your organization under Organization Options and any score at that level or below will trigger a prompt to create an Action Plan.

You can also add an Action Plan at any time by clicking the button for New Action Plan. Each Action Plan includes a focus (activity related to the creation of the plan), description and notes, as well as

the basic five steps related to identifying the current and future/desired situations.

The terminology "Action Plan" can be modified so these tools have a different name within your Organization Options.

- ✓ **Note:** Add a note for any personnel-related actions taking place outside the JobTRACK® System that you wish to have on file. Examples: verbal warnings, written warnings, career development discussions, coaching sessions, and any other pertinent activities to have in the HR file.
- ✓ **Top Choice Coaching:** Anytime a performer is starting a new job, as a new hire or by transfer, succession or promotion, it can be valuable to review their fit for the job and identify the strengths and development opportunities they bring to the job. Select the role, and then document where there are fits to optimize and opportunities to create development plans for.

These actions or data are available for the different Activities:

- ✓ **Edit:** Click the pencil icon to edit a review.
- ✓ **Delete:** Click the X icon to delete a review (after confirmation). Only Administrators are permitted to delete Activities. If an Activity has been deleted, it cannot be recovered.
- ✓ **Print:** Any of the activity types can be printed. Reviews have an option to print without the scores filled in (to use as a pre-review worksheet), or with the scores filled in for the employment files; as well as parameters to include Reviewer's scores, Performer's scores, or both. Review Comments can be moved to the end of the report for those with extensive comments.
- ✓ **Development Guide (for Reviews only):** Those Critical Tasks (or Values Actions) that are most important for the job, and for which improved performance is indicated, are clearly sorted into the Development Priority #1 box in this nine-box grid designed as a guide for ongoing development work by the job holder.
- ✓ **Action Plan Progress Checks:** If a number is displayed in this column, that is the number of Progress Check(s) that

have been set up for the corresponding Action Plan. Click the number to access (edit and/or print) the Action Plan(s), or click + to add a new Progress Check.

When you create a new Progress Check, an email will be sent to the Reviewer (you) today, notifying them the Progress Check has been scheduled. The Performer will also get an email if the Progress Check is to be filled out by the Performer.

Then a second email will go out on the date scheduled, with a link for the specified person (Performer or Reviewer) reminding them to check in on the progress.

- ✓ **Clone Action Plan:** Click the icon in this column to clone that Action Plan. You'll be prompted to identify the Person this Action Plan to should be cloned for.
- ✓ **Self Review | Send:** Click the icon to send a Self Review request for any review in the grid. Specify the number of days the emailed link should remain active. You can re-send a Self Review link and specify an extension if needed.
- ✓ **Self Review | Expiration:** This is the date the Self Review link will expire. If the performer has completed their self review (and clicked Submit), the expiration date will be removed and the link will be deactivated.
- ✓ **Activity | Completion:** For Self-Reviews, this column will display the percentage of Critical Tasks (or Values Actions) that have been scored by the performer. If they have scored all CTs but have not yet clicked Submit, this will show 100%. When they click Submit, the percentage will be replaced with the date of completion.
The requesting Reviewer and the Performer will receive an automated email notification on the day prior to expiration if the Performer has not yet Submitted their Self Review.
For Action Plans, this column will display the date when the Action Plan was marked Completed.
- ✓ **Send Packet | Send:** Click the icon to send an email to this person containing a PDF version of the report for any Activity in the grid. The performer will receive an

email with the PDF of the activity as well attached

For a Self-Review, the email will include a link to confirm their receipt of this packet. Specify the number of days the emailed link should remain active. You can re-send a Review Packet link and specify an extension for the performer to confirm their receipt if needed.

- ✓ **Review Packet | Expiration:** This is the date the Review Packet receipt confirmation link will expire. If the performer has confirmed their receipt of the Review Packet, the expiration date will be removed and the link will be deactivated.

- ✓ **Send Packet | Confirmation:** This column will display the date the performer confirmed they received their emailed Review Packet, or the date they submitted their Progress Check.

For Self-Review Packets, the requesting Reviewer and the Performer will receive an automated email notification on the day prior to expiration if the Performer has not yet confirmed their receipt of the Review Packet.

- ✓ **Begin Date:** This is a system-generated date recording when the activity was initiated as an internal control.

Work Groups

Work Groups are designed to group people together by locations, departments, etc. Access the Work Groups area below the People menu to manage the performance for a department or team.

Note that you may wish to create a Work Group for the entire organization to conveniently create Reviews for all People at once time.

Work Group Grid

- ✓ **Add Work Group:** Create a new Work Group.
- ✓ **Edit:** Click the pencil icon to edit a Work Group.
- ✓ **Delete:** Click the X icon to delete a Work Group (after confirmation).
- ✓ **Print Work Group Performance Management Summary:** Shows all

members of the Work Group in separate columns, with a summary of their reviews for the past year shown as rows on the report. Use this report to evaluate work group performance levels over time. Click on any person's name to go to that person's individual Performance Management Coaching Tool report.

- ✓ **Print Work Group Performance Management by Criticality:** This report displays the members of the work group as rows, with a score for each component of their review(s) shown as columns grouped by level of criticality. The KRAs are listed on the left, and the overall JobTRACK score is shown on the right. Use this report to evaluate work group performance based on criticality of results. Click on any person's name to go to that person's individual Performance Management Coaching Tool report.

- ✓ **Print Review Completion Dashboard:** This dashboard report shows the people down the side of the report with two columns for each month, one for Performance Reviews and one for Values Alignment Reviews (if applicable). An "R" indicates that type of review has been completed by the Reviewer (manager) for that month; a "P" indicates that type of review has been completed by the Performer (employee). "Completed" is defined as having a score for every Critical Task (or Values Action) within all reviews found on file for that month. This dashboard is designed to help managers who are tracking performance levels on a monthly basis keep track of which reviews they have or have not yet completed.

- ✓ **Print Work Group Monthly Review Summary:** This dashboard report shows the people down the side of the report with two columns showing the overall review score for each person each month, one for Performance Reviews and one for Values Alignment Reviews (if applicable). This report is designed to help managers who are tracking performance levels on a monthly basis keep track of which reviews they have or have not yet completed, as well as view a snapshot of the overall work group performance levels.

- ✓ **Print Work Group Reviews:** Use this option to generate a single report showing

all of the Job Performance Reviews and/or Values Alignment Reviews found for the work group for a month (or any timeframe).

- ✓ **Print Work Group Plan:** Use this option to generate a single report showing all Action Plans found for the work group for a month (or any timeframe).

Work Group Data:

- **Work Group Name** describes the members, such as a department name.
- **Organization** will have drop down list if you have more than one.
- **Assign People** will show your entire list of people. Check the boxes on the right to select each member of the Work Group.
- **Send Self-Review Request to Work Group:** Click the button to send either a Job Performance or a Values Alignment Self-Review to all members of a work group. Self-Reviews can only be sent to People who have an email address specified. You can choose to create new Reviews for each person, or to add this Self Review to the most recent review already on file. If a person has more than one Job assigned to them, they will receive a Self-Review request for all Jobs currently assigned.

To send a request to the entire organization, create a work group consisting of all employees.

Work Groups Members Grid

- ✓ **Delete:** Click the X icon to delete a Person from the Work Group (after confirmation).
- ✓ **Up/Down Arrows:** Click the up or down arrow to move a person in the Work Group sequence.
- ✓ **Person:** Click the person's name to move directly to the page for that Person.
- ✓ **Print Individual Performance Management Coaching Tool:** The icon next to each person will generate the Performance Management Coaching Tool by individual.

Contact

- **Add/Change Login Request** allows you to request new Administrator users or changes to Administrator user rights. This link takes you to the Client Portal for that request functionality.