



# What's New in emPerform Version 5.3SP3?

## Customer Release Notes

Release Date: June 2021

We are committed to the ongoing development and improvement of emPerform. This new release brings important upgrades to help support your organization's performance management efforts. The following document outlines the new release features, enhancements, and fixes.

As always, please feel free to contact us with your questions or feedback.

1-877-711-0367 | [support@employee-performance.com](mailto:support@employee-performance.com)

### In This Document:

- [Enhancements](#)
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- [Instructions for Upgrade](#)

## Enhancements

### Enhancements in emPerform 5.3SP3:

What's New?		Area	Details
•	One way password encryption	Login/Password	One-way password encryption for better password and user security.
•	Reset password functionality	Login/Password	Existing 'Forgot Password' functionality has been replaced with Reset Password and separate 'Reset Password' page. Users must choose to reset a password and will receive a unique url to change their password online. See below for further details.
•	New report formatting for 360 rater report, appraisal report, and on-demand form reports	Appraisal Report	Reports in emPerform have been re-formatted for a easier reading and printing. Colours have been adjusted to greyscale, spacing and fonts have been optimized for readability, and orientation has changed from landscape to portrait. See below for samples.
•	Ability to synch org-level assignments	Administration	Allows for the copying of org-level assignments from the master to the appraisal. This may have an effect on library assignments if they are mapped to org levels, so some data may change if library assignments are changed during synching, but Administrators will get a warning prior to the change.
•	Due date column added to 'Employees in Workflow State' status report	Reporting	The report has been edited to show the 'Due Date' column of when the workflow state is/was due.
•	Five decimal places used in compensation manager calculations	Compensation Manager	Calculations will now round up to the five (5) decimal places, making results more accurate.

## Fixes

### Fixes in emPerform 5.3SP3:

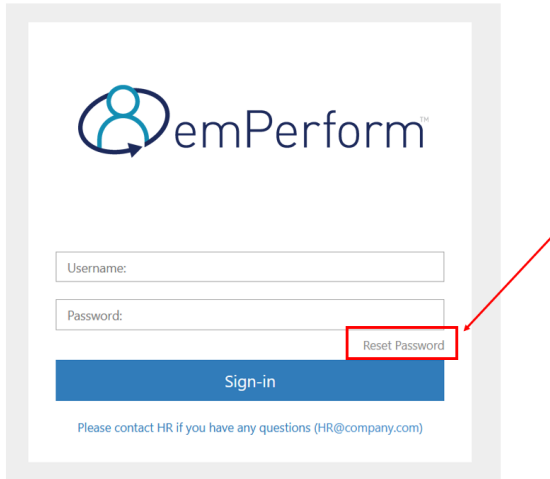
What's New?		Area	Details
•	Mobile user interface fixes	End-User	We continue to adjust the mobile emPerform user interface so the screens are easy to navigate and use on the browsers of mobile devices.
•	Only active employees can login using Single sign On	End-User	The latest version allows only active employees to login using Single Sign On.
•	Attachments stored to temporary file	Common	For better security, attachments will be stored in a Temporary Folder while being uploaded.
•	Url open error resolved in Administration module when proxying in as employee	Administration	The 'review url already open ' error has now been resolved for when an Administrator is proxying in as a user.
•	Employee assignment table filter fixed	Administration	The filter on the 'employee assignments' pages and tables has bene fixed.
•	Email name in subject line fixed	Common	Issues related to the incorrect employee name appearing in email subjects has been resolved.
•	Pasting rich text into tags has been resolved	tag	Issues related to users attempting to paste rich-text into the tag input box has been resolved. Users can now paste text into tag and tag will automatically convert to plain text for the tag wall and when tags are added to any appraisal report.

## Enhancements in Detail

### New Reset Password Functionality

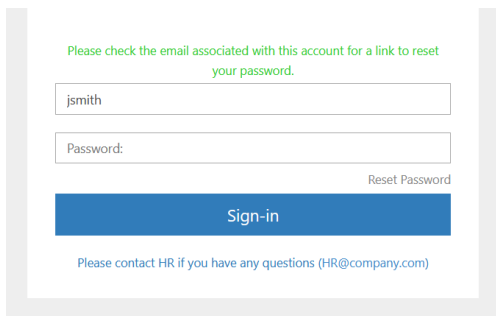
emPerform's latest release replaces the existing 'forgot password' option (which sends the password to the user) with a more secure 'reset password' feature.

1. Users would choose 'Reset Password'



The screenshot shows the emPerform login interface. At the top is the emPerform logo. Below it are two input fields: 'Username:' and 'Password:'. To the right of the 'Password:' field is a red-bordered box containing the text 'Reset Password', with a red arrow pointing to it from the right. Below the input fields is a blue 'Sign-in' button. At the bottom, there is a link: 'Please contact HR if you have any questions (HR@company.com)'.

2. The user will be prompted to check their email for a unique link to reset password. This link expires in 48 hours.



The screenshot shows a confirmation page for password reset. At the top, a green message reads: 'Please check the email associated with this account for a link to reset your password.' Below this are two input fields: one containing 'jsmith' and another labeled 'Password:'. To the right of the 'Password:' field is a 'Reset Password' link. Below the input fields is a blue 'Sign-in' button. At the bottom, there is a link: 'Please contact HR if you have any questions (HR@company.com)'.

We received a Reset Password request for the emPerform account associated with this email address. Use the link below to reset your password.

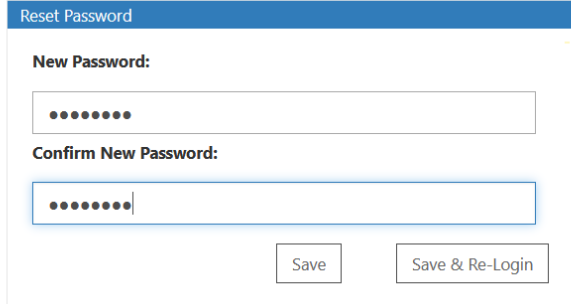
This link will expire in 2 days.

Click the link below or copy and paste into your browser:  
[Click to reset your password](#)

Or copy and paste the link below:  
[https://test11.crgroup.com///EP5.3SP3\\_ResetPassword/ResetPassword/kVPI2ZPjt6072RpfHWesmCBtl@3odch0UJSozcV7I2DWSmDoP@cbFoQuGtT@vG8%6080YNbWVu0BnvHUvt9B1pEe@qMJBhN@l1mV@ceXggBkoxxfiTem%60e4NtkirTLXvG33Grgo3XDF75UmEFLnegwNOEOmScyj@YZgf0OGYGvcyVly6llQ==](https://test11.crgroup.com///EP5.3SP3_ResetPassword/ResetPassword/kVPI2ZPjt6072RpfHWesmCBtl@3odch0UJSozcV7I2DWSmDoP@cbFoQuGtT@vG8%6080YNbWVu0BnvHUvt9B1pEe@qMJBhN@l1mV@ceXggBkoxxfiTem%60e4NtkirTLXvG33Grgo3XDF75UmEFLnegwNOEOmScyj@YZgf0OGYGvcyVly6llQ==)

- When the link is clicked, a unique page will open, allowing the user to reset and confirm their new password.

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Reset Password

New Password:

Confirm New Password:

Save Save & Re-Login

## New Report Format

Printed reports for appraisals, on-demand forms, and 360° raters has been enhanced with new formatting to make the reports easier to read and print.

- Colours have been modified to be grey-scale
- spacing and font sizes and have been improved for easier reading and navigation
- orientation has been changed to horizontal, instead of landscape
- New options to 'hide' controls in printed reports (more below)

### Sample 60 Rater report – new formatting:

### 360° Review Feedback Report

Quarterly Review - 2018

Manager Details		Employee Details	
Samantha Bruce		John Smith	
Join Date	9/23/2014	Company	emPlus Co.
Company	emPlus Co.	Division	General & Admin
Division	General & Admin	Department	Administration
Department	Administration	Position	Director of Administration
Position	Administrative Assistant		

Summary			
Evaluation Area	Library Element	Score	Respondents
Respondents(3)		Did not Respond (5)	
Ray Cantrell	Clinton Alexander		
Burton Best	Shelby Castro		
May Abrego	Evangeline Richards		
	Harlan Banks		
	Ocean Baird		

### 360° Review Results

#### Skills & Behaviors

Instructions for Peer Review: Peer reviewers please take time to provide comments to support the ratings you give.

#### Application of Job Knowledge

START	STOP	KEEP GOING
Ray Cantrell	Burton Best	Ray Cantrell
Attending more lunch & learns	Attending more workshops to help increase job knowledge.	Attending more lunch & learns
Burton Best	May Abrego	Burton Best
Attending more workshops.	Nothing at this time.	She has a strong job knowledge already.
May Abrego	Ray Cantrell	May Abrego
Attending more workshops.	Nothing at this time.	I don't think she needs to stop doing anything.
Ray Cantrell	Burton Best	Ray Cantrell
Nothing at this time.	She has a strong job knowledge already.	Continue to host lunch & learns to show job knowledge.
Burton Best	May Abrego	
She has a strong job knowledge already.	I don't think she needs to stop doing anything.	
May Abrego	Ray Cantrell	
I don't think she needs to stop doing anything.	Continue to host lunch & learns to show job knowledge.	

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## Sample appraisal report – new formatting:

### Evaluation Report - Ashley Landry

Company Performance Review - 2018

Employee Details		Manager Details	
Ashley Landry		John Smith	
Join Date	2/21/2008	Join Date	6/12/2010
Company	emPlus Co.	Company	emPlus Co.
Division	General & Admin	Division	General & Admin
Department	Administration	Department	Administration
Position	Administrative Assistant	Position	Administrative Manager

Summary			
Evaluation Area	Weight	Average Score-By Employee	Average Score-By Manager
Goals	40.00%	Most Goals Achieved	Some Goals Achieved
Competencies	60.00%	Consistently Observed	Observed
Total	100.00%	3.25	2.63

#### Introduction

Review Process Overview: 1. Employees will set goals and forward to managers. 2. Managers will edit goals and meet with employee to discuss. 3. The review will remain open for monitoring and updates. 4. The employee will be prompted to complete a self-assessment. 5. Managers will complete their portion of the review. 6. Employee and managers will meet to discuss and plan goals for the subsequent year. 7. Employees will be asked to sign-off on their review.

#### Goals

Please rate the overall progress and status of goals that were set. Be sure to use tag to help support the progress and performance related to each goal.

#### Host monthly lunch & learn events

**Information**

S.M.A.R.T. Goal Definition: In the area below please share how this goal fits within the SMART Goal Framework.

Explain the specific (S) of this goal, how it will be measured (M), and if it is attainable (A). Host lunch and learn events on relevant and timely topics. Organize all logistics, prepare content, track attendance and effective follow up with material.

(R) - To illustrate that the Goal is Relevant, please align it to an Organizational objective Invest in employee development

(T) - To illustrate that the Goal is time-bound, please select a target completion date 12/31/2018

#### Employee

Rating: Active Goal

Mid-Year Comments: This goal is on-track for completion. Seven training events has been completed.

Employee Year-End Comments: The lunch and learn events have been a great success.

#### Manager

Rating: Goal Achieved

Manager Comments:

tag:

#### Improve Performance Management Processes

**Information**

S.M.A.R.T. Goal Definition: In the area below please share how this goal fits within the SMART Goal Framework.

Explain the specific (S) of this goal, how it will be measured (M), and if it is attainable (A). Improve existing manual performance management processes by researching and evaluating an online solution.

(R) - To illustrate that the Goal is Relevant, please align it to an Organizational objective Improve our internal processes and productivity

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### Evaluation Report - Ashley Landry

Company Performance Review - 2018

**MANAGER QUESTIONS** (not visible to employee):  
Tell us your thoughts about this individual's career capabilities within the organization by answering the following questions.

Could the employee perform at a higher level, in a different position or take on increased responsibilities within the next year (consider the person's ability only, not whether there is a position available to support this growth)?  Yes  No

Could the employee perform at a higher level, in a different position, or take on increased responsibilities within the next three years (consider the person's ability only, not whether there is a position available to support this growth)?  Yes  No

When might this employee qualify for a promotion? Next 6 months

Can you envision this employee performing two levels above his or her current position in the next five to six years?  Yes  No

Is the organization likely to value growth of the skills and competencies of this employee over the next several years?  Yes  No

Could the employee learn the additional skills and competencies he or she needs to be able to perform at a higher or different level?  Yes  No

Does the employee demonstrate leadership ability by showing initiative and vision, delivering on promised results, communicating effectively, and taking appropriate credit?  Yes  No

Does the employee demonstrate comfort with a broader company perspective than his or her job currently requires?  Not selected

Does the employee demonstrate flexibility and motivation to move into a job that might be different than any that currently exist?  Not selected

Does the employee welcome opportunities for learning and development?  Not selected

#### Final Comments

Manager Comments:

#### 1:1 Check-Ins & Meetings

1:1 Check-Ins  
Managers are encouraged to meet frequently with employees to review goals and behaviors, and discuss and milestones or development opportunities. Formal mid-year check-ins are mandatory; however, managers should document at least monthly meetings by selecting 'add new' and completing the meeting details as outlined. tag journals can also be used as ad-hoc documentation and you can add these here.

A Manager's Guide to Employee Check-Ins

Opening 1:1 Check-In Note:  
Meeting October 21-2018: We met quickly to review the client feedback that was submitted. Ashley did a great job and was happy to get the track. Meeting Sept 15-2018: We discussed the status of goals and everything seems to be on track. Ashley is almost done her certification training so we will plan a meeting after that for review.  
Meeting 4-2018: Email communication has been lacking lately so we need to discuss. Ashley is aware of the importance and will find the time to send clear, thorough emails.

Additional tags or journals:  
You - 7562017  
O2 check-in meeting: We meet for 40 minutes to discuss the status of goals, particularly the lunch and learn sessions. She had missed a month due to office scheduling so everything is still on track. We discussed possible topics and Ashley has agreed to source internal content experts for the sessions and plan better meeting next time. She got some great feedback from a vendor this month on her responsiveness and professionalism. Everything is on-track.  
You - 8922018  
O3 meeting notes: we met to discuss the progress of the projects and what resources are needed. all seems on track.  
You - 12142018  
great questions in the meeting we talked about abc  
You - 12142018  
ASHLEY WAS LATE TODAY

#### Final Year-End Comments (Manager):

Final Year-End Comments (Employee): It has been a productive year and I look forward to next year!

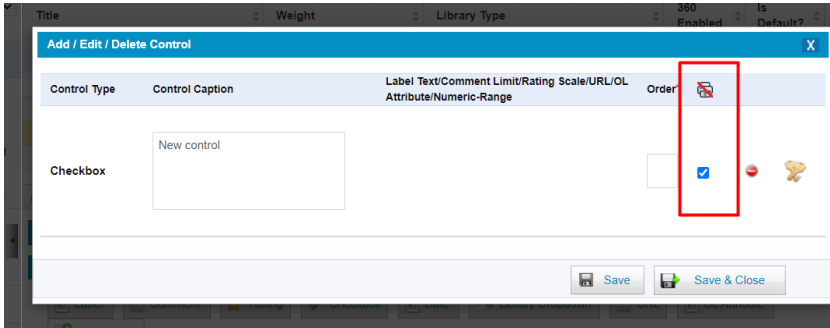
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### Hiding a control from a printed report:

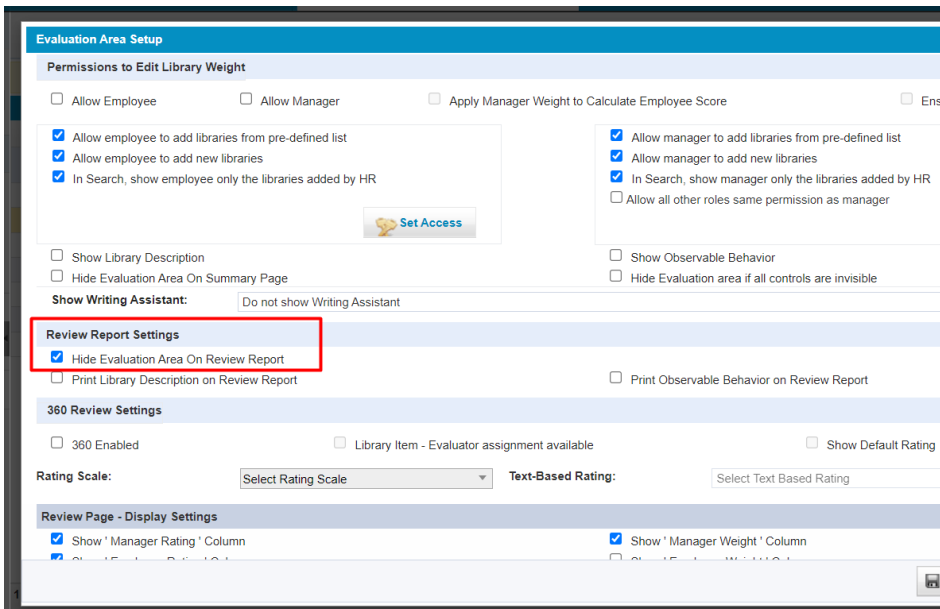
There are some controls that Administrators may not want showing on the printed report – to save space, or keep the report 'cleaner'. emPerform now allows you to choose if you would like each control hidden from the printed report.

Check the box in the control area and it will not appear on the printed report for any user generating the report:



### Hiding an evaluation area from a printed report:

In addition, if Administrators would like to hide complete evaluation areas on the printed report, they can now do that in the 'Evaluation Area Setup' section.



**\*remember:** using the control access/permissions, you can already set certain controls as 'hidden' from users at certain times of the cycle. This means the control would be hidden from the user when printing the report anyways.

## Upgrade Instructions

### For Hosted Customers:

If you are a hosted customer, you are asked to schedule an upgrade at your convenience. As part of the upgrade, you will also be asked to schedule a 15-minute meeting with a System Administrator to help guide you through the configuration of the new layout and settings.

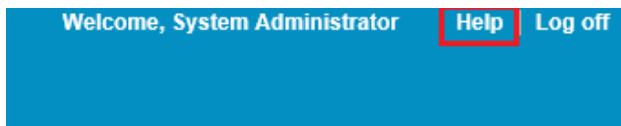
→ [Click here to schedule your upgrade](#)

**For On-Premise Customers:**

If you have emPerform deployed within your network, your IT department will need to download the update files and upgrade emPerform. To download the files, please refer to the email sent to you with the download links or contact us to secure the file downloads.

## System Administrator Manuals

Access the updated Administrator user guide and training tutorials in the Administrator User Guide which you can access from within the Administrator Module:



**We are thrilled to bring you this latest release of emPerform!**

If you have any questions, please contact support: [support@employee-performance.com](mailto:support@employee-performance.com)