

Quick Start Guide

Job Templates

Job templates are used to populate Job Descriptions in symplr Performance and provide information and evaluation forms for appraisals. Creating templates for use on all subsequent Job Descriptions provides significant time savings when building and editing documents.

It is recommended that you create and use templates for content that is common to all employees and all Job Descriptions (e.g. mission statements, company vision, facility/organization-wide values, etc.).

Overview

Before getting into the details of job templates, let's have a quick overview of the process as a whole.

- 1 **Add a new template.** First step requires you add a new template to the system. This requires entering basic information, such as a name and description.
- 2 **Add sections to template.** Once a template exists, create sections to help organize the information it will contain. This helps you quickly locate necessary requirements when using the template.
- 3 **Add content to sections.** Now that you have sections in your template, begin adding content. This can include blocks of informational text as well as specific requirements associated with positions.
- 4 **Publish template.** Templates must be published in order for them to be used with job descriptions. Make sure to publish your template once it's fully populated!

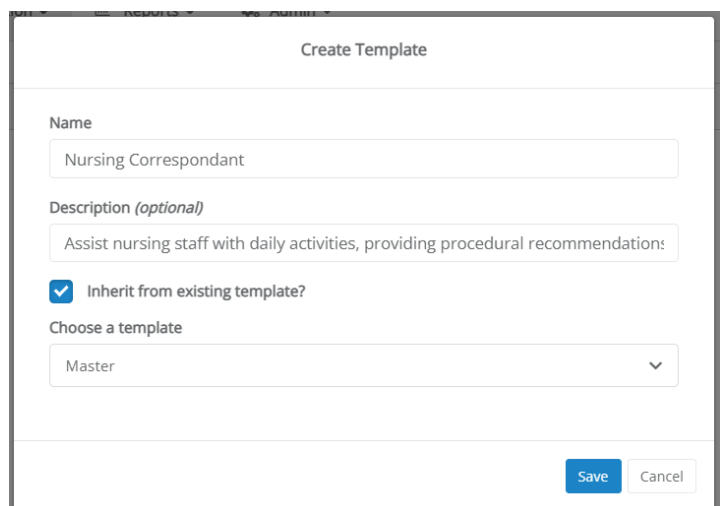
Add a New Template

The first main step is to add a new template.

1. From the *Templates* page under the **Job Description** area, click **Add Template**. This opens the *Template Editor* page with a blank form.
2. In the *Create Template* window, enter a **Name** and **Description** for the template.
3. If you wish to include information from an existing template, check the **Inherit from existing template** option.

This displays an additional **Choose a template** drop-down field where you select a template whose information you want to include.

4. Click **Save**. A blank template page opens.

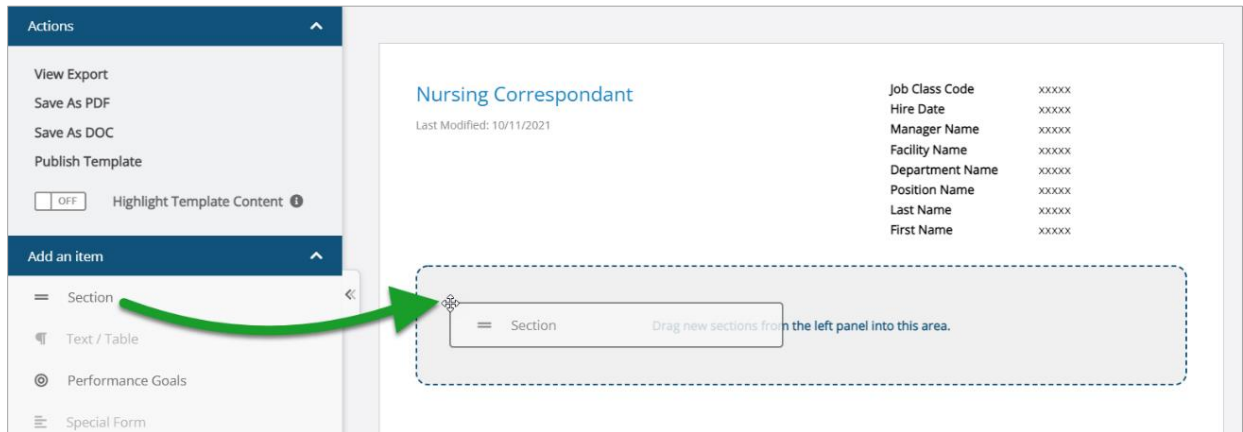


Add Sections to Template

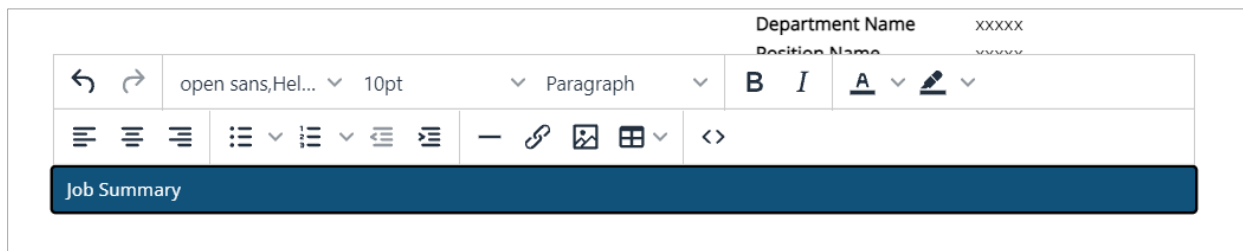
Sections help organize the information within the template. Templates can contain any number of sections.

The form automatically saves your progress as items are added, so there's no Save button to click along the way.

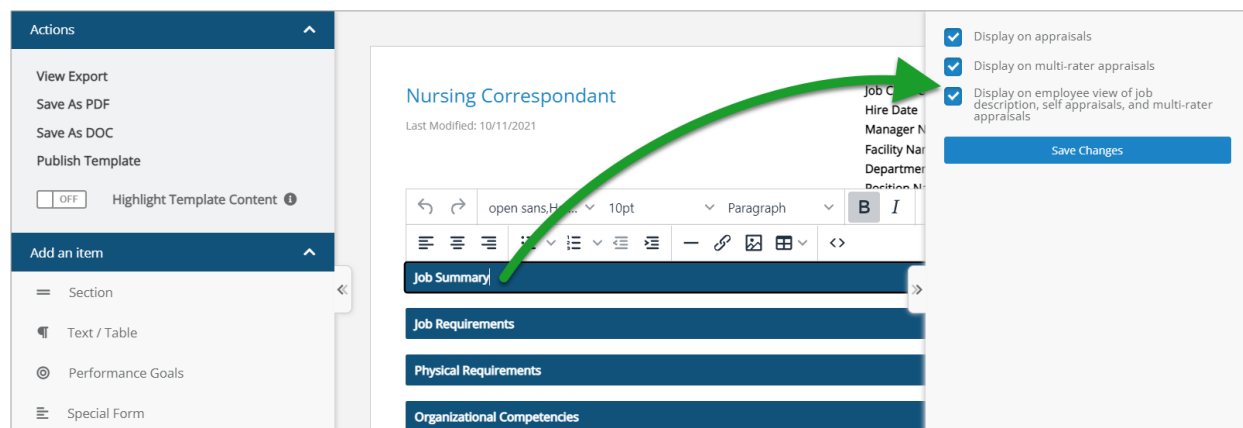
1. From the **Add an item** panel on the left of the page, click on the **Section** item in the list and drag it over to the main area of the job description template.



2. Once dropped into the template, the section header displays and allows you to enter a title for the new section. A text editor above the section header provides formatting options for the title (font, text size, color, alignment, etc.).



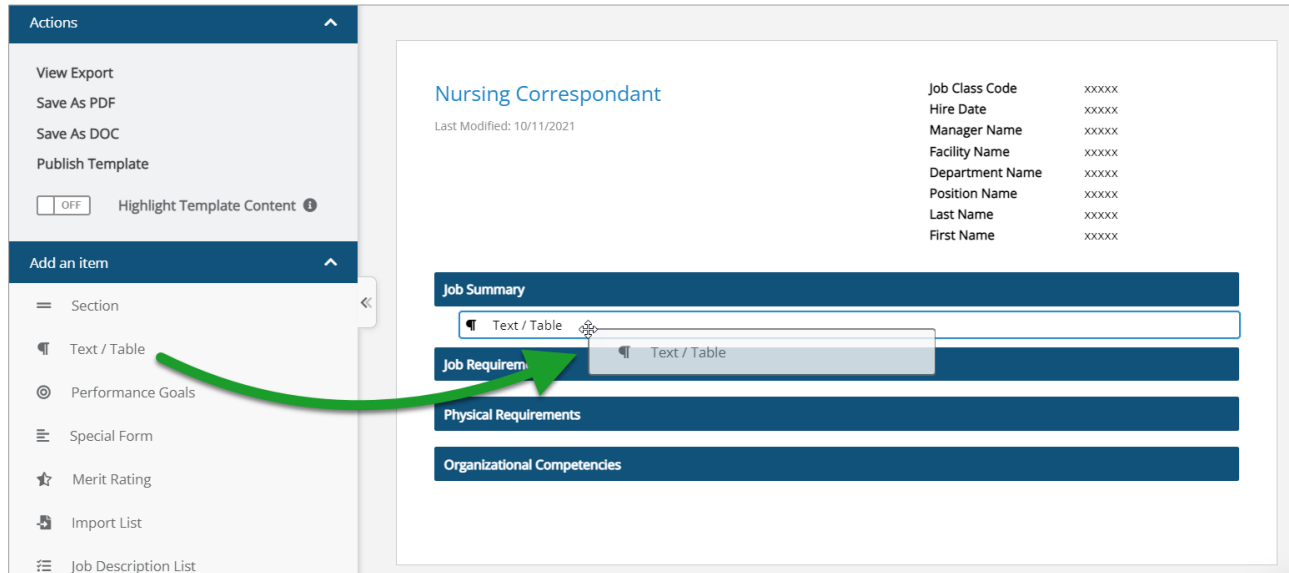
3. Select a section header to reveal appraisal display settings for that section and adjust as needed. These settings determine which appraisals the section should appear (if any).



4. Repeat these steps as necessary until all desired sections have been added.

Add Content to Sections

After all the desired template sections have been added, begin adding content to those sections. This is done the same as adding Sections: drag-and-drop the desired content from the **Add an item** pane on the left to the heading where the content should appear.



There are various types of items that can be added to templates. Depending on the type of content added, additional options are displayed (e.g. selecting pre-defined content, checking specific items to include, bullet types, appraisal display options).

- **Text/Table.** An open text field that supports basic text entry and the insertion of tables.
- **Performance Goals.** Adds a new section to the template that automatically populates with performance goals pulled from individual employee profiles. Only one Performance Goals section can be added to a job description template.

- **Special Form.** Special forms are generic or universally applicable sections of information. Adding Special Form content to a template opens the **Add Special Form** pop-up window that prompts you to select a pre-defined form.

Once a form is selected, contents of that form are displayed so you can check specific items to include. The window also prompts you to select bullet types and appraisal display options.

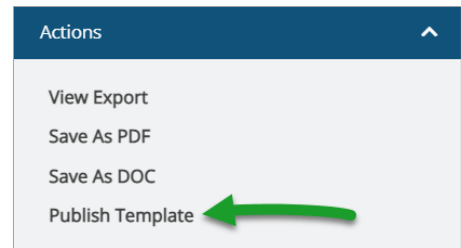
- **Merit Rating.** Similar to Performance Goals, this item adds a new section to the template that automatically populates with merit rating content. Only one Merit Rating section can be added to a job description template.
- **Import List.** This option is used to copy/paste content from external sources such as Word documents. (Details about this process can be found in the [Appendix.](#))
- **Job Description List.** Similar to Special Forms, adding a Job Description List item opens a pop-up window with options for selecting pre-defined content, choosing which list items to include, formatting bulleted items, and, when applicable, including an evaluation list for the selected items.

The 'Add Special Form' pop-up window displays options for selecting a special form and configuring its display. The 'Choose a special form' dropdown is set to 'General Activity'. Below, there are checkboxes for 'Stand/Walk' and 'Sit' with time intervals: 6-8 hours, 4-6 hours, 2-4 hours, 1-2 hours, and None. The '2-4 hours' option for 'Sit' is checked. Below that is a 'Choose a bullet type' dropdown set to 'Disc'. At the bottom, there are three checked options: 'Display on appraisals', 'Display on multi-rater appraisals', and 'Display on employee view of job description, self appraisals, and multi-rater appraisals'. 'Submit' and 'Cancel' buttons are at the bottom right.

Publish Template

When finished adding items to the template, click the **Publish Template** link in the **Actions** panel on the left of the page. A confirmation window opens asking you to verify the publishing of the new template.

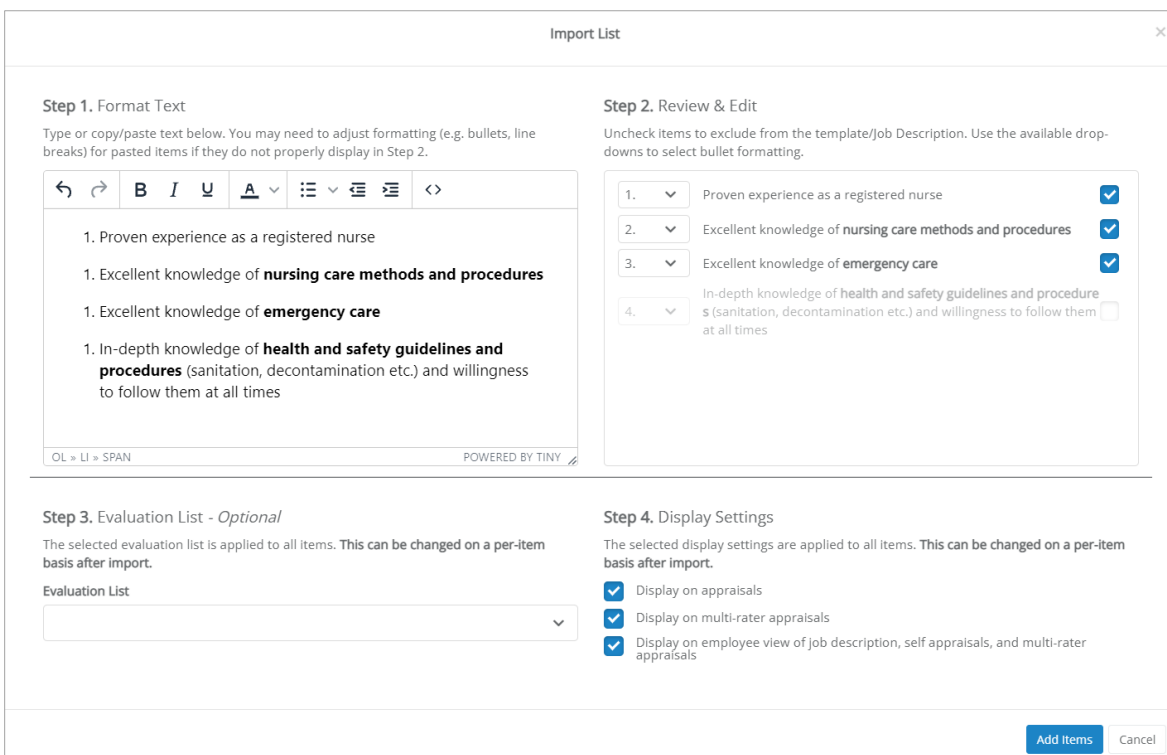
Clicking **OK** in the confirmation window confirms the publishing the template and makes it available for use with new and existing job descriptions.



Appendix: Import List

The **Import List** item provides a way to quickly add lists into sections of job templates by copy and pasting content from external sources such as Word documents or other online systems.

When **Import List** is added to a section of your template, an *Import List* pop-up window opens for you to add, format, and configure content. The window outlines each step in the process in different sections to make it easy to add desired content to the template.

A screenshot of the 'Import List' pop-up window. The window is titled 'Import List' and has a close button in the top right corner. It is divided into four main sections: 'Step 1. Format Text', 'Step 2. Review & Edit', 'Step 3. Evaluation List - Optional', and 'Step 4. Display Settings'. Step 1 includes a text area with a rich text editor toolbar and a list of four items. Step 2 includes a list of four items with checkboxes. Step 3 includes a dropdown menu for 'Evaluation List'. Step 4 includes three checkboxes for display settings. At the bottom right, there are 'Add Items' and 'Cancel' buttons.

1. **Step 1: Format Text.** Type in or copy-and-paste desired content into the text box. Use the available formatting tools at the top of the text field to make any necessary formatting changes.
2. **Step 2: Review & Edit.** Content added to the text box is automatically parsed and displayed here. Deselect (uncheck) any items to remove them from the import process.
3. **Step 3: Evaluation List.** Use the drop-down to select an evaluation list to apply to the selected items.
4. **Step 4: Display Settings.** Select the appraisals you want to use the imported items.