

**GOAL SETTING**

As the Performance representative for your division, you will have access to View Dashboard in the left-hand menu bar of the Performance system.

**Performance Planning**

My Goals
View Dashboard

Clicking on **View Dashboard** opens filters for you to sort your results.

On the left panel -

**HR Rep:** Ignore it

**Approver:** Search by Supervisor

**Department:** Search by Departments (although all departments show, you will only have access to those within your division)

**Team Member:** Search by Employee

HR Rep	(All)	▼
Approver	(All)	▼
Department	(All)	▼
Team Member	(All)	▼

On the right panel -

**Pending Action:** Search by tasks that are pending – Assign Goals and Set Goals are the only two pending actions you can search for. Employees with no “to-dos” are excluded from the dashboard.

**# Goals:** Search by the number of goals the employee has set and/or manager has assigned

**Plan Period:** Search by current goal period

**Due Date Range:** Search by tasks that are due during a specific period of time (helpful to see everyone who has a task due in the next week)

Pending Action	(All)	▼
# Goals	(All)	▼
Plan Period	(All)	▼
Due Date Range	Start: <input type="text"/>	
	End: <input type="text"/>	

\*If you are going to send reminders through the system, you can control whether the reminder goes only to the employee or manager (approver) or to both of them.

**Options**

Send Remind to:  Team Member  Approver  Both


You then have the capability to customize the email.

Results:




## Division Performance Contact Dashboard Instructions

Approver	Department	Team Member	Pending Action	# Due	# Goals	Plan Period	Earliest Due Date	<input type="checkbox"/>	Actions
Pinnock, Kenneth M.	Human Resources Administration	Seales, Shannon M.	Set Your Goals	1	0	15-16 Goal Plan Period	12/4/2015	<input type="checkbox"/>	Remind



# of Goals



Due Date for Task


### APPRAISAL

As the Performance representative in your division, you will have access to the Appraisal Dashboard in the left-hand menu bar of the Performance system.




Clicking on **Appraisal Dashboard** opens filters for you to sort your results.


HR Reps	<input type="button" value="Ignore"/>	Pinnock, Kenneth M. Seales, Shannon M.
Managers	<input type="button" value="Filter by Manager"/>	Abrams, Jeanne E. Afsahi, Armin Aliaga, Katherine Allen, Douglas B.
Appraisal For	<input type="button" value="Filter by Employee"/>	Abbott, Kelsey L. Adams, Sarah J. Adams, Todd R. Aderhold, Jonathan
Departments	<input type="button" value="Filter by Department"/>	Accountancy Admission Admission & Records-Grad Three Facu Advancement Communications
Jobs	<input type="button" value="Filter by Job Title"/>	Performance Management
Show Employees Who Are		<input checked="" type="radio"/> Active <input type="radio"/> Inactive
Reviewer Periods	<input type="button" value="Filter by Current Reviewer Period"/>	2015 Appraisals Test Appraisals
Action Items	<input type="button" value="Filter by Step in Process"/>	Write Appraisal Read Appraisal Select Reviewers Manage Meeting
Due Date Range	<input type="button" value="Filter by Tasks that are due during a specific period of time"/>	Start: <input type="text"/> End: <input type="text"/>
ShowTasksThatAre		Active
Show Appraisals With Tasks Only		<input checked="" type="checkbox"/>



Show Active Employees only



Search for all Tasks that are Active or only those Past Due



Uncheck this to see Closed Appraisals

### Results:

Appraisal For	Job Title:	Action Items	Reviewer	Reviewer Role	Status:	Due Date	<input type="checkbox"/>	Actions
Alvarez, Jeannette P.	Performance Management	Manage Meeting	Colmenero, Sergio R.	Direct Manager	Complete Assessments		<input type="checkbox"/>	View Detail
					Live and untouched	9/25/2015	<input type="checkbox"/>	Remind

\* Reminder emails are sent to the employee only and are not customizable - they are the same email that is sent for that step of the appraisal.

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