HUMAN RESOURCES &
INCLUSIVE COMMUNITY

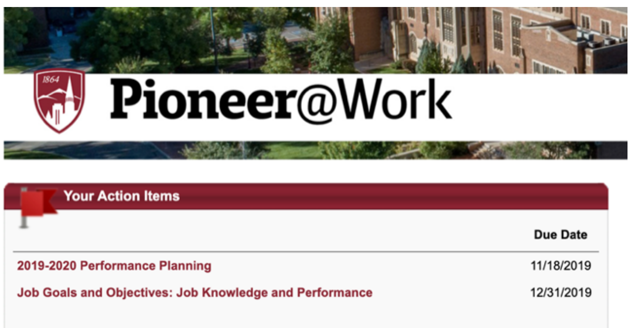
PERFORMANCE MANAGEMENT AT DU

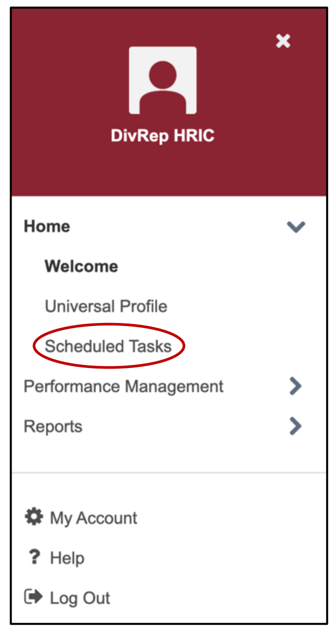
DASHBOARD AND REPORTING USER GUIDE

FOR DIVISION REPRESENTATIVES

LOGGING IN

1. Log into PioneerWeb
2. Under the Employee Tab, in the My Resources box, open Performance Management folder and select Performance System Login
3. Enter your DU credentials (firstname.lastname@du.edu and password) which will bring you to the home screen where you can see your performance managment tasks.





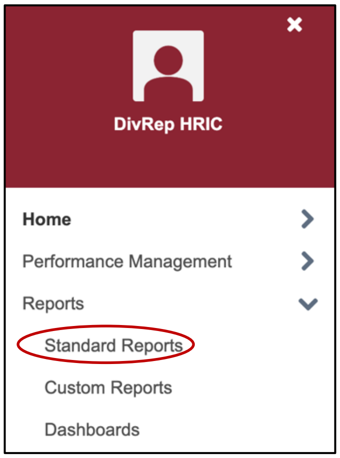
SYSTEM NAVIGATION

- To return to the Home screen at any time, click on the Pioneer@Work logo at the top left.
- Utilize the “Your Action Items” section to engage with first 10 active tasks throughout the Performance cycle.
- For Online Help about the current screen you are on, select “? Help” under the hamburger menu.

SCHEDULED TASK

For a complete list of all active tasks that you must complete (beyond the first 10 on the “Your Action Items” list), go to the hamburger menu , click on home, click on Scheduled Tasks.

REPORTS

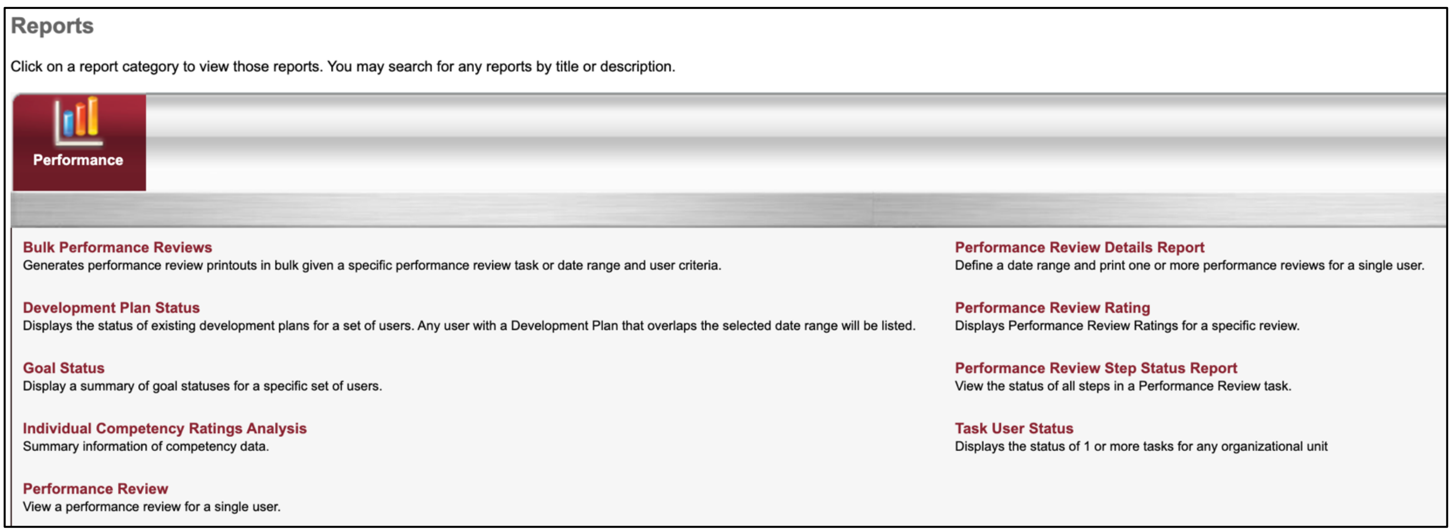


Standard Reports

Select Standard Reports to view a have a variety of different reports to support your division in performance management.

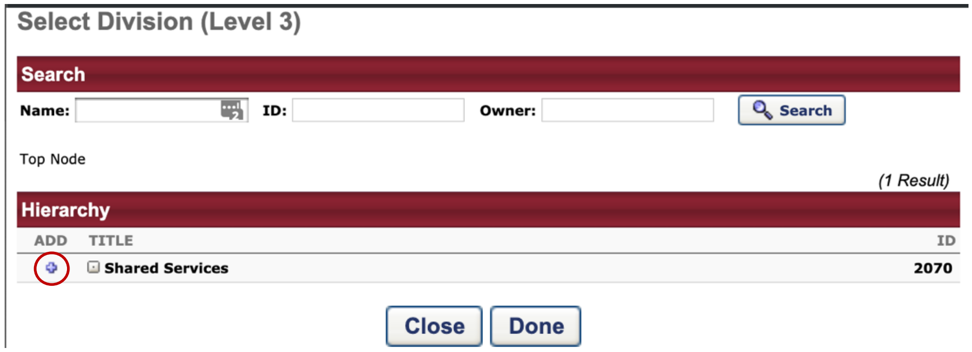
Note: All reports will allow you to view your division(s) only.

Note: If you have compensation responsibilities, you will see an additional button labeled Compensation.



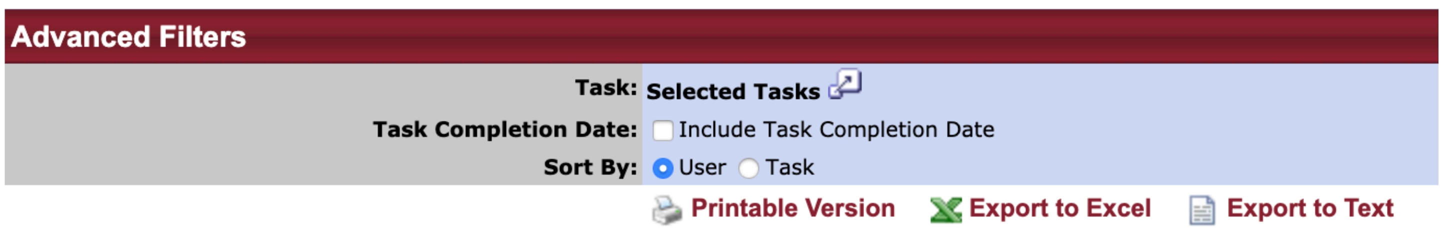
To Run a Report

1. Select the report you would like to run. A new dialogue box will populate with selections for parameters on the report.
   a. USER CRITERIA: To run a report for all user's in your division or on your team, select "Division (Level 3)". To run a report for any other population within your division, choose the appropriate user criteria.
   b. Use the circled button below to select the population you want to report on. You will be able to select any organization in DU; however, data will only populate for employee's in divisions that you support.



c. To select the criteria, click on the purple plus button next to the criteria data and then select Done.

2. Once you have selected the User Criteria, you will need to select the name of the tasks you want data from in the report. Select the arrow icon next to "Select Task(s)" to choose. Only tasks you have access to will populate with data.
3. Once you choose the task, select "Export to Excel" to run the report.

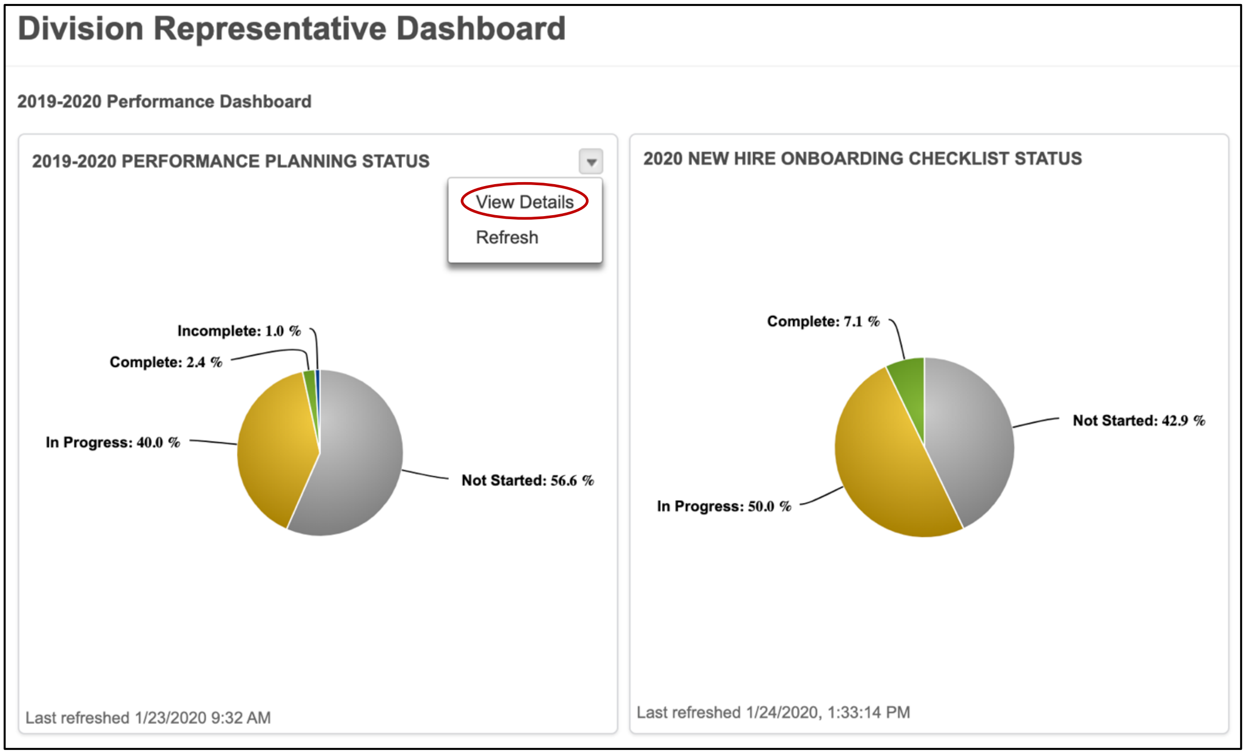


Custom Reports: There are none at this time.

Please feel free to play around in the Reports feature to see what else you need. If you find that you want or need a custom report, please reach out to performancemanagement@du.edu for consideration.

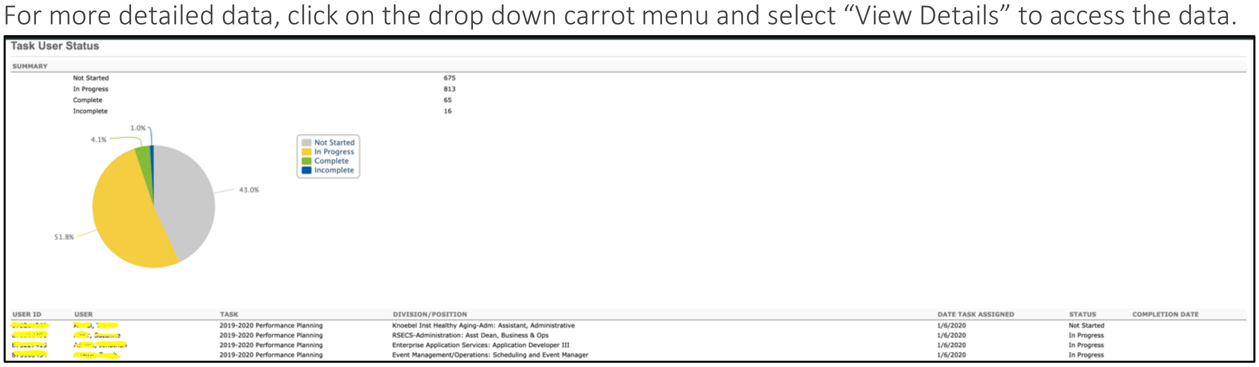
DASHBOARDS

To access dashboard, go to the Hamburger menu, then "Reports", and select "Dashboard"



<u>Performance Planning Status</u> and <u>New Hire Onboarding Checklist Status</u>

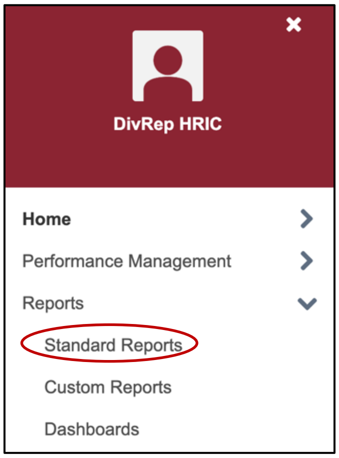
- These each show you the status or who is *Not Started*, *In Progress* and *Complete* in each task.
- For more detailed data, click on the drop down carrot menu and select "View Details" to access the data.



- Send any reminders to complete steps in a task from your own email account.
- *Note: If Performance Planning has not been signed off by the employee, then their data will NOT show up in the "Your Action Items" or the year-end Performance Review.*

NEW HIRE ONBOARDING CHECKLIST – VIEW INDIVIDUAL REPORTS

After viewing the New Hire Onboarding Checklist status in Dashboards, you can also view the individual employee and managers responses.

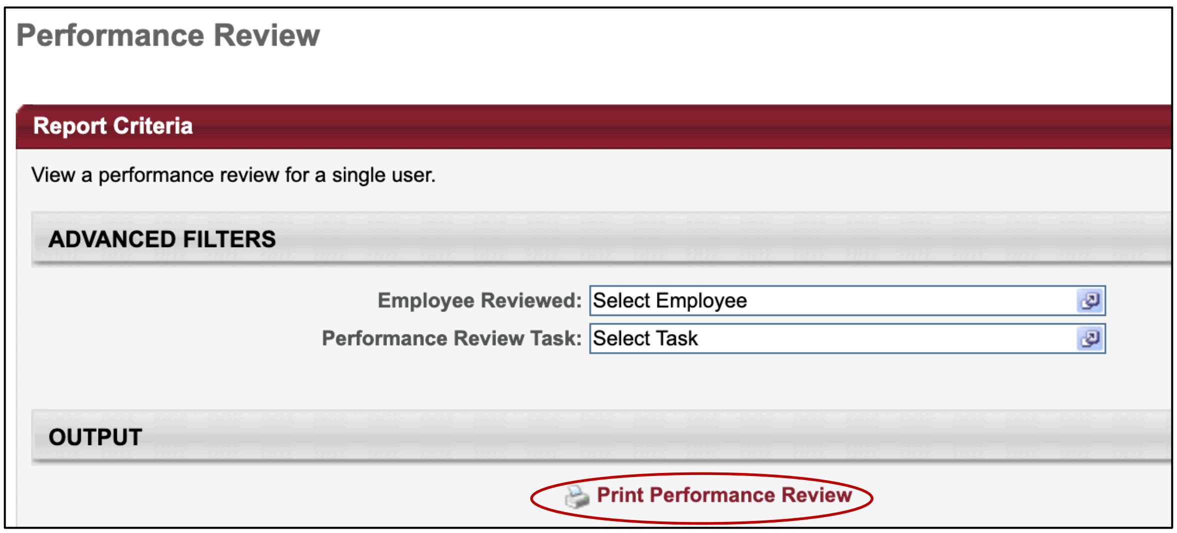


1. Go to the hamburger menu, open "Reports", click on "Standard Reports".

2. Select "Performance Review".

3. To select the employee, click on the icon next to "Employee Reviewed" and search by last name, first name. Click Search. Click on the name of the individual you are searching.

4. To select the task, click on the icon next to "Performance Review Task" and search for "New Hire Onboarding Checklist". Click the item, New Hire Onboarding Checklist.



5. Once an employee's name and New Hire Onboarding Checklist are populated, click on Print Performance Review to download the report.
6. Select where you want to save the report.
7. Open the report to view the responses for the employee you have chosen to review.

PERFORMANCE PLANNING – VIEW INDIVIDUAL REPORTS

Follow the instructions from the above section. For the Performance Review Task, select [current year] Performance Planning instead of New Hire Onboarding Checklist.

VIEW STATUS REPORT – FOR ALL TASKS (PERFORMANCE PLANNING AND PERFORMANCE REVIEW)

How many employees are finished with Step 1? Step 2? Step 3? Trying to figure out if the task is stuck in a step?

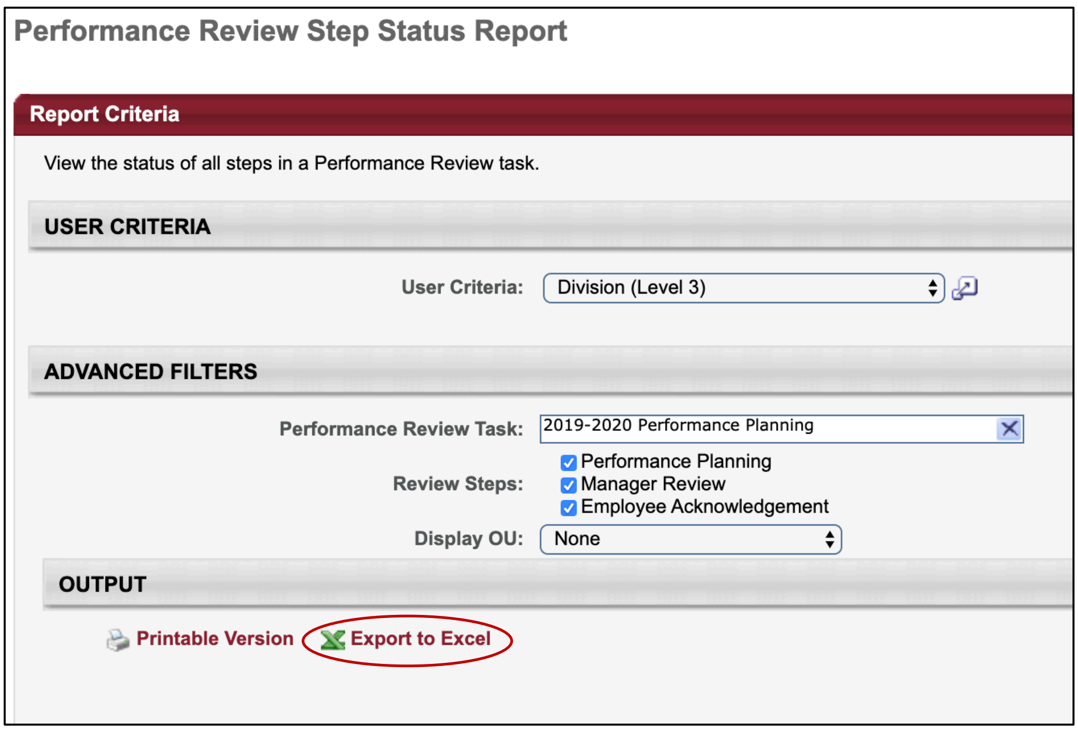
1. Go to the hamburger menu, open "Reports", click on "Standard Reports".

2. Select "Performance Review Step Status Report".

3. Under **User Criteria**, select "Division (Level 3)"

4. To select the task, click on the icon next to "Performance Review Task" under **Advanced Filters** and search for tasks, for example, "2019-2020 Performance Planning" and select the correct cycle timeline – either Merit or Academic. Click the desired task item.

5. Under **Output**, select Export to Excel and save to a location of your choosing on your computer.



REMINDERS

There are several system-generated reminders related to all tasks. Employees will receive reminders at the following intervals:

- When task is assigned to you
- Due in 5 days
- 1 day past due
- 30 days past due
- 60 days past due
- 90 days past due
- 120 Days past due

In monitoring the dashboards for outstanding tasks, please feel free to send any additional emails, do so from your own email account to send reminders and make sure that all tasks have been completed.

QUESTIONS?

Reach out to performancemanagment@du.edu
For more information about Performance Management at DU, please visit www.du.edu/performancemanagement.com