

PERFORMANCE MANAGEMENT SYSTEM MANAGER GUIDE

TABLE OF CONTENTS

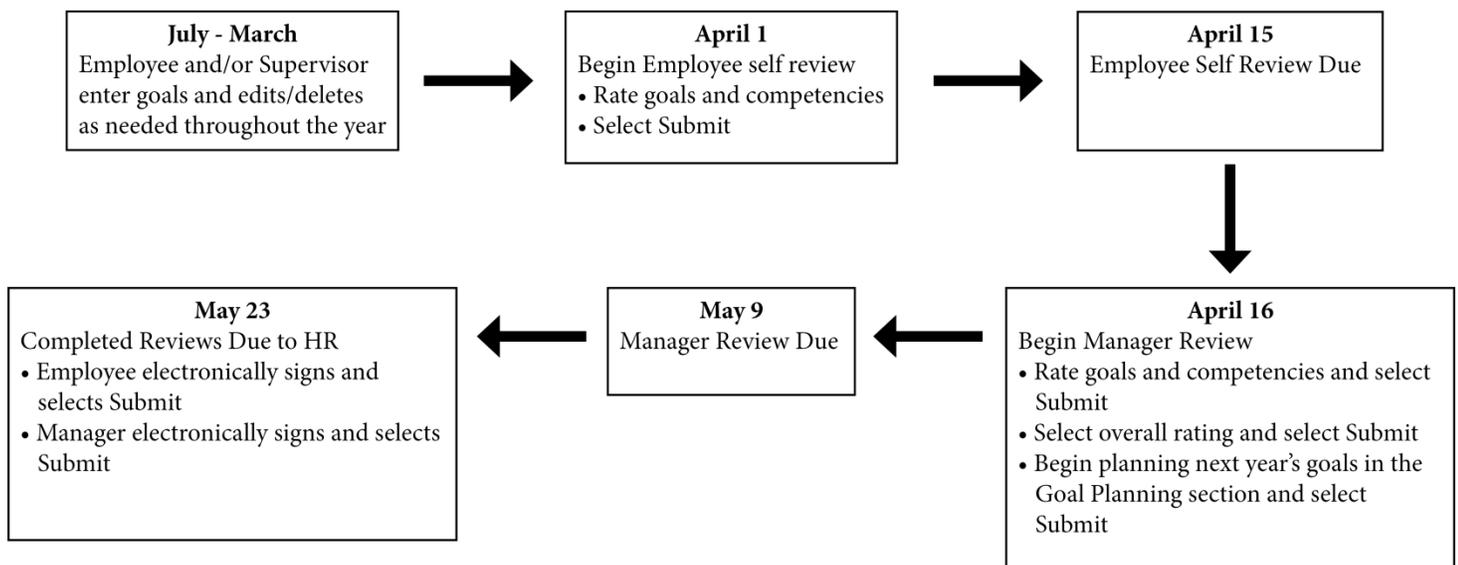
Process and System Information.....	2
Performance Management Process	2
Accessing Career Pathway.....	2
Adding a Proxy	3
Goals, Competencies, and Goal Comments.....	4
Adding Goals for Your Employee	4
Viewing and Editing Your Employee’s Goals.....	5
Deleting Your Employee’s Goals	5
Changing Goal Progress for Your Employee’s Goals	5
Viewing Competencies	6
Adding, Editing, and Deleting Comments	6
Manager Review: Rating Your Employee’s Goals and Competencies	7
Adding a Co-Planner.....	7
Completing Your Manager Review	7
Completing Your Manager Review Offline	9
Reopening Your Employee’s Self Review	10
Goal Planning: Thinking About Next Fiscal Year’s Goals	11
Goal Planning.....	11
Signing and Printing Your Employee’s Evaluation.....	12
Signing Your Employee’s Evaluation	12
Printing Your Employee’s Performance Review.....	12

PROCESS AND SYSTEM INFORMATION

Performance Management Process

- 1) July - March: Employee and/or Manager enter goals and edits/deletes as needed throughout the year.
- 2) April: System automatically releases self-assessment to employee, who rates him/herself on all goals and competencies.
- 3) Mid-April: System moves evaluation to manager, who rates the employee's goals, competencies, and overall performance.
 - a. Once manager is finished rating, the system moves the evaluation into a "Goal Planning" phase where the manager and employee can begin entering goals for the next cycle.
 - b. Manager and employee electronically sign the evaluation and it is closed out for the year. Any goals that were entered during the "Goal Planning" phase will be copied to the Goals page under the Performance tab.

Suggested Performance Management Timeline



Accessing Career Pathway

- 1) Log in to DrexelOne (<http://one.drexel.edu>).
- 2) Select the Employees tab.
- 3) Select Career Pathway under the Development & Certifications heading.

Adding a Proxy

You would add someone as your proxy if you would like them to complete tasks on your behalf within the system. For example, a Vice President's Executive Assistant would be set up as a proxy to enter performance evaluation content on behalf of the Vice President.

- 1) Select the My Team tab.
- 2) Hover over the arrow in the bottom right corner of the box containing your name and select Share Permissions from the menu that appears.



- 3) Select **Select Delegates**.
- 4) Search for the user with whom you want to share your permissions.
- 5) Select **+** next to the user's name.
- 6) Repeat steps 4-6 for additional users.
- 7) Select **Done** when finished adding delegates.
- 8) To assign all of your permissions to a user(s):
 - a. Select the checkboxes for the direct reports and their subordinates, if applicable, for whom the delegate should share permissions.
 - b. Select **↓ Add Delegates**.
- 9) To assign limited permissions to a user(s):
 - a. Select **→ Define Access by Permission** on the right side of the screen.
 - b. Select the checkboxes for the access that you want to share with the delegate.
 - c. Select **Save**.
 - d. Select **↓ Add Delegates**.

GOALS, COMPETENCIES, AND GOAL COMMENTS

Adding Goals for Your Employee

- 1) Select the Performance tab.
- 2) Select .
- 3) Enter goal Title and Description information.
- 4) Change Start and Due Dates, if necessary: The dates will default to the start and end dates of the performance cycle (July 1 – June 30).
- 5) Upload any applicable attachments by selecting  next to Attachments. You and your employee can also upload attachments throughout the year.
- 6) Select one of the following options:
 - a. : Select if you are not yet ready to save the goal.
 - b. : Select if you do not wish to save the goal.
 - c. : Select if you are finished drafting your goal and you want to save it or assign it to one of your direct reports.
 - d. : Select if you would like to spellcheck the goal that you drafted. You may select spellcheck prior to saving your goal as a draft or selecting Next.
- 7) If you selected :
 - a. To assign the goal to yourself, select the Yourself radio button and select .
 - b. To assign the goal to one of your direct reports, select the Your Team radio button.
 - i. Create a separate goal for each user: This will create a separate goal for each user and he/she will be able to update the progress individually. You can select one or multiple direct reports using this option by selecting the checkbox next to their name.
 - ii. Select .

Viewing and Editing Your Employee's Goals

- 1) Select the My Team tab.
- 2) Select the name of your employee in the left navigation bar.



- 3) Select **Performance**. Your employee's goals will display.
- 4) To edit the goal:
 - a. Select the Goal Title.
 - b. Select the Edit link in the upper right corner.
 - c. Make your changes and then select **Submit Changes**.

Deleting Your Employee's Goals

Goals can be deleted throughout the year as you and your employee see fit.

- 1) Select the Performance tab.
- 2) Select the Team Goals tab under the Details header.
- 3) Select the down arrow in the Options column to view the goals for your employee.
- 4) Select **X** in the Options column.
- 5) Select Yes to delete the goal.

Changing Goal Progress for Your Employee's Goals

As your employee completes his/her goal throughout the year, you and your employee can update the Progress percentage that is displayed on the Goals page. *Updating the Goal Progress is not mandatory; it is an optional tool.*

- 1) Select the My Team tab.
- 2) Select the name of your employee in the left navigation bar.



- 3) Select **Performance**. Your employee goals will display.
- 4) Select your employee's goal title.
- 5) Update the % in the text field next to Progress.
- 6) Select **Save** or **Save and Close**.

Viewing Competencies

Drexel's core competencies are listed on the Competencies page under the Performance tab. The Shared Values competency has been added that encompasses the Shared Values that are outlined in the [2012-2017 Strategic Plan](#). Use the [How do the Shared Values relate to my job/role?](#) and [Shared Values Behavior Examples](#) documents to better understand how you can apply the Shared Values to your position.

There is no further action required on the Competencies page. Once your employee's self-assessment is released by the system in April, you and your employee will have access to rate your employee's performance for each competency.

Adding, Editing, and Deleting Comments

Career Pathway allows you and your employee to write comments for a particular goal throughout the year. You can use the Comments section to update the progress on a goal or track milestones. *Adding comments is not mandatory; it is an optional tool.*

- 1) Select the My Team tab.
- 2) Select the name of your employee in the left navigation bar.



3) Select **Performance**. Your employee's goals will display.

4) Select your employee's goal title.

5) Select  next to the Comments heading.

6) Enter your comment text. Select  to check the spelling.

7) Select .

8) To edit your comment, select  on the far right, make your changes, and select .

9) To delete your comment, select  and then . Be aware that once you delete your comment you cannot retrieve it.

MANAGER REVIEW: RATING YOUR EMPLOYEE'S GOALS AND COMPETENCIES

Adding a Co-Planner

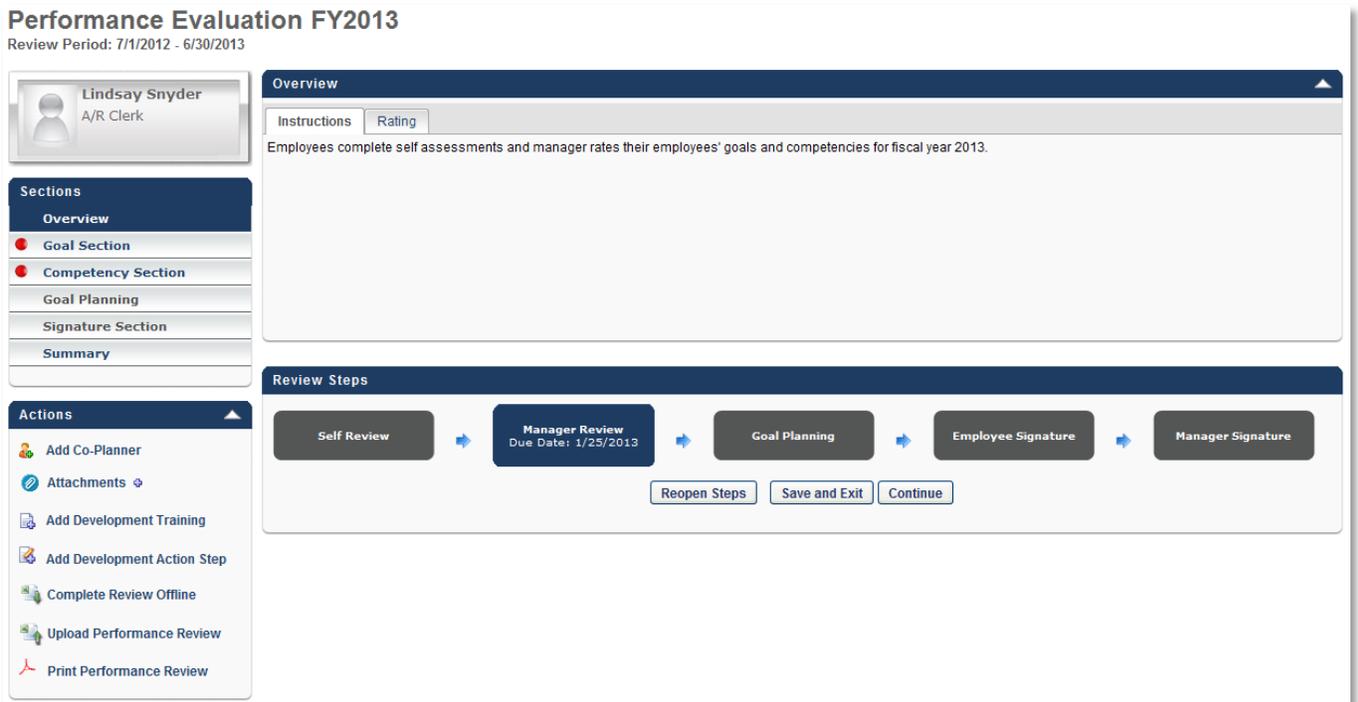
If your employee has a secondary manager, you can add him/her as a co-planner.

- 1) Select  **Add Co-Planner** in the Actions box on the left-hand side of the page.
- 2) Search for the co-planner and then select  next to their name.
- 3) Select .
- 4) You can remove the co-planner at any time by selecting  next to their name in the Actions box.

Completing Your Manager Review

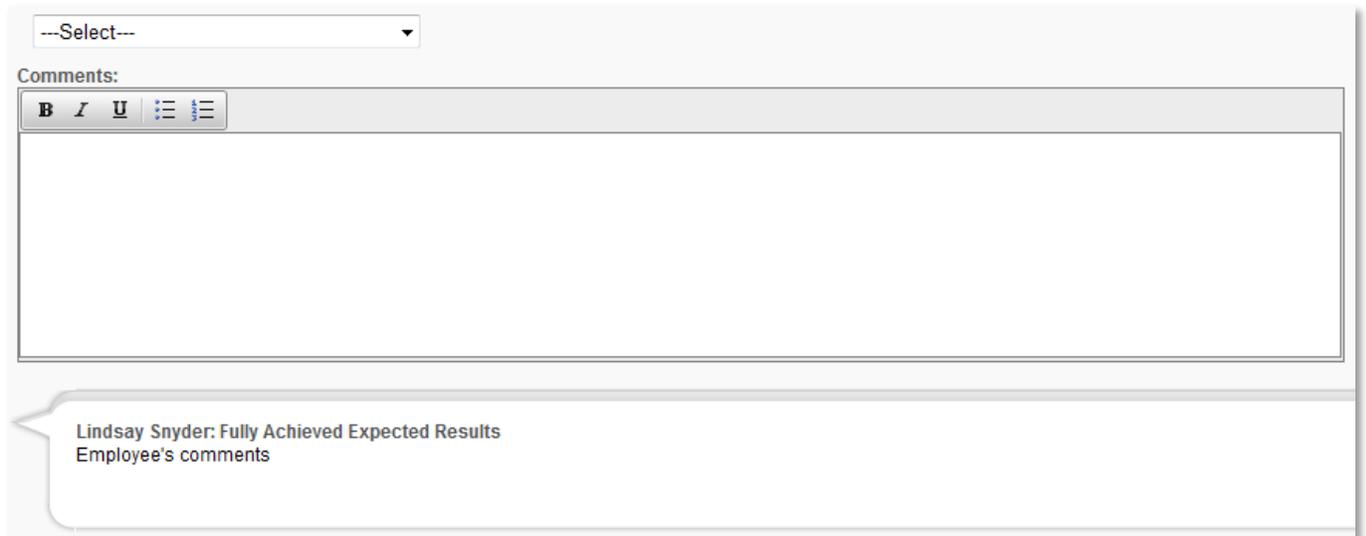
The system will automatically release your employee's evaluation in April. It will include the goals that you and/or your employee have entered into the system and the Drexel competencies (shown on the Competencies page under the Performance tab and described on page 6). Once your employee submits his/her self review, you will have access to rate his/her goals and competencies.

- 1) Hover over the Performance tab and select Performance Reviews from the drop down menu.
- 2) Select  **Complete Manager Review of** under the My Assigned Reviews tab. (Your icon will include the name of your employee.)
- 3) Select the appropriate section under the Sections list or Continue at the bottom of the page.



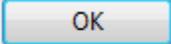
- 4) For each of your employee's goals, select a rating from the drop down menu and enter any comments in the Comments field. Your employee's self review rating and comments will display underneath the

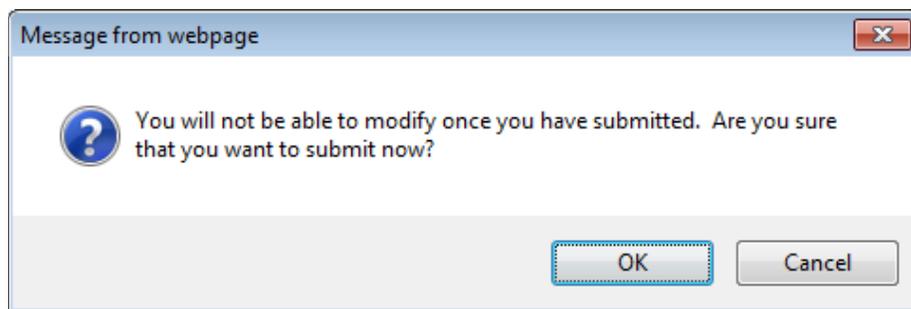
Comments field.

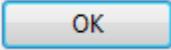


- 5) Select .
- 6) For each of the competencies, select a rating from the drop down menu and enter any comments in the Comments field.



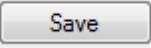
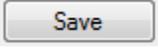
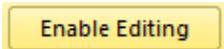
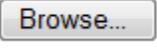
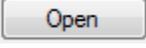
- 7) Select .
- 8) On the Summary page, review the ratings that you selected for your employee's goals and competencies. If you would like to change a rating, select the Goal or Competency Section links in the Sections sidebar. If you are finished rating your employee's goals and competencies, select .
- 9) The system will verify that you are ready to submit your manager review. Select  to submit.



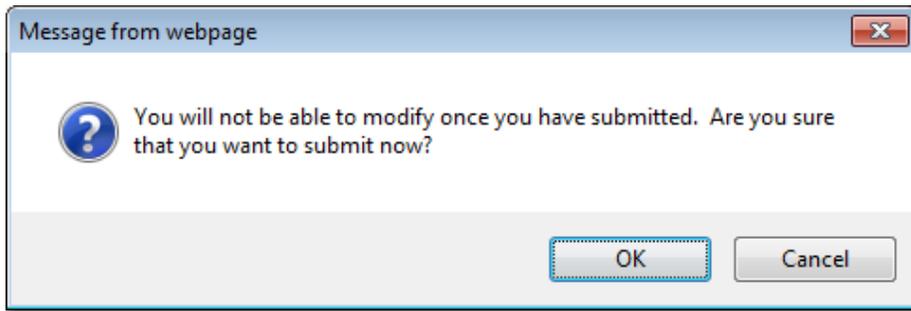
- 10) After you select Submit, select the Overall Performance Evaluation Rating section from the left navigation bar.
- 11) Select the overall evaluation rating from the drop down menu and enter overall comments about the employee's performance.
- 12) Select .
- 13) The system will verify that you are ready to submit your manager review. Select  to submit.

Completing Your Manager Review Offline

Your manager review can also be completed entirely offline using Microsoft Excel.

1. Select  **Complete Review Offline** in the Actions box on the left-hand side of the page.
2. When the Excel dialog box appears, select  and navigate to where you would like to save the review. If you like, you can change the name that the file will be saved as.
3. Select .
4. In the Excel Document
 - a. Select  in the ribbon at the top of the screen, if necessary.
 - b. Overview Tab: This tab contains instructional information such as the rating scale description and information about the offline performance review form.
 - c. Goal Section Tab: The rating scale will display at the top of this tab. Your employee's goals will be listed starting on row 24.
 - i. Select the rating for each goal in column F.
 - ii. Enter comments for each goal in column G. Entering comments is optional.
 - iii. Save the document.
 - d. Competency Section Tab: The rating scale will display at the top of this tab. The competencies will be listed starting on row 24.
 - i. Select the rating for each competency in column C.
 - ii. Enter comments for each goal in column D. Entering comments is optional.
 - iii. Save and close the document.
5. In Career Pathway
 - a. Select  **Upload Performance Review** in the Actions box on the left-hand side of the page.
 - b. Select , navigate to where you saved the performance review file, and select .
 - c. Select .
 - d. Select . The ratings and comments that you entered for your goals and competencies will now display in the online performance review.

- e. Select the Goal section from the left navigation bar. Your ratings and comments will display for each goal. Select .
- f. The Competencies section will display with your ratings and comments for each competency. Select .
- g. The Summary section will display. Double check your ratings and then select .
- h. The system will verify that you are ready to submit your manager review. Select to submit.



- i. Select the Overall Performance Evaluation Rating section from the left navigation bar.
- j. Select the overall evaluation rating from the drop down menu and enter overall comments about the employee's performance.
- k. Select .
- l. The system will verify that you are ready to submit your manager review. Select to submit.

Reopening Your Employee's Self Review

You can reopen your employee's self review if he/she wants to make adjustments to ratings or comments. If you need to revise your ratings/comments after you submit your manager review, please contact hrlearn@drexel.edu.

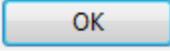
1. Select Performance Reviews under the Performance tab.
2. Select the evaluation title to view the evaluation.
3. Select on the Overview section page, under the Review Steps roadmap.
4. Select . Your employee now will be able to change his/her ratings/comments.

GOAL PLANNING: THINKING ABOUT NEXT FISCAL YEAR'S GOALS

Goal Planning

Once you submit your overall evaluation rating, the evaluation is moved to the Goal Planning step. This step provides an optional opportunity for the manager and employee to begin thinking about the goals that the employee will complete during the upcoming performance cycle. Our suggestion is to use this section to enter general outlines or a rough draft of the employee's upcoming goals. Once goals are saved in this section, they will be copied to the Goals page under the Performance tab, where the employee and manager can update, add, and delete goals closer to the upcoming performance cycle. ***Regardless of if you begin adding goals in this step or not, you must submit this section of the evaluation.***

You should complete the following steps. Your employee will not have access to add goals through the Goal Planning step in the performance review cycle. If you would like your employee to add the goals during the Goal Planning step, he/she can add goals on the Goals page under the Performance tab. If this is the case, you will only need to complete steps 8 and 9 below.

- 1) Select the Goal Planning section from the left navigation bar.
- 2) Select . You may need to disable your pop-up blocker to proceed.
- 3) Enter the goal title and description.
- 4) Change the start and due dates as necessary to correspond to the upcoming performance cycle or the start and due dates for that goal.
- 5) Add Attachments by selecting  next to the Attachments heading.
- 6) Select  when you are finished drafting the goal.
- 7) Once the goal is saved, it is copied to the Goals page under the Performance tab, where you and your employee can edit or delete it as necessary.
- 8) Once you are finished entering goals for the upcoming performance cycle, or if you do not wish to enter goals for the upcoming performance cycle at this time, select .
- 9) The system will verify that you are ready to submit. Select  to submit.

SIGNING AND PRINTING YOUR EMPLOYEE'S EVALUATION

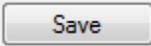
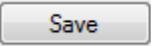
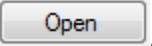
Signing Your Employee's Evaluation

- 1) Select the Signature Section on the left navigation bar.
- 2) Type your name in the text box next to the Manager label.
- 3) Select .
- 4) Once the page refreshes, your signature will be saved with a time stamp.
- 5) Once you are absolutely sure that your employee's evaluation is complete and no changes will need to be made to it, select . **You will not be able to make any changes to the evaluation once it has been submitted.**
- 6) Once the evaluation is submitted, you will be able to access it in your employee's past evaluations.
 - a. Select the My Team tab.
 - b. Select the employee on the left navigation bar.



- c. Select .
- d. Select the Reviews link in the horizontal navigation bar.
- e. Select the title of the performance review to view the full document.

Printing Your Employee's Performance Review

1. Select  **Print Performance Review** in the Actions box on the left-hand side of the page.
2. Select either the Manager Version or Reviewee Version. If the manager review is submitted, both options will display the same information. If the manager review is not submitted, the Reviewee Version will not display the manager's ratings and/or comments.
3. Select .
4. When the File Download dialog box appears, select  and navigate to where you would like to save your review. If you like, you can change the name that the file will be saved as.
5. Select .
6. To view, select .