



# WORKFORCE ONE

Performance Reviews

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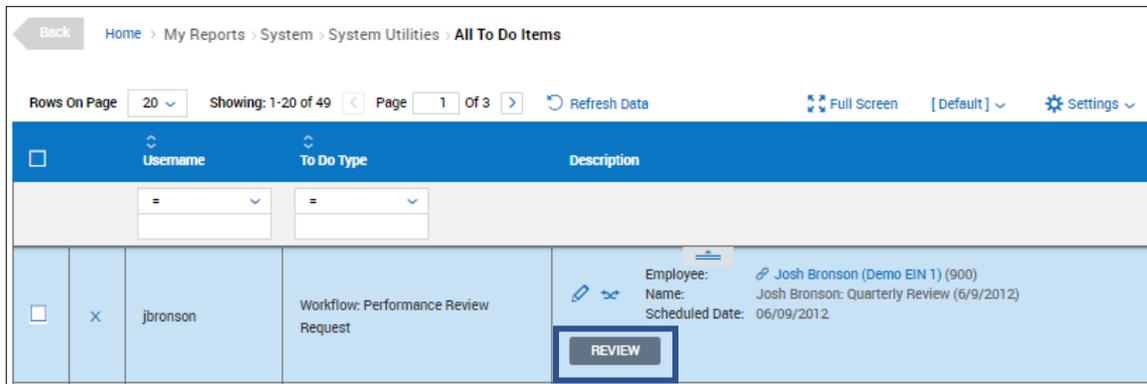
## Performance Reviews

Performance reviews can be completed online and are customizable allowing for multiple manager reviews as well as self-review. The questions and answer choices in the performance review are also customizable to your needs. In addition to demonstrating performance reviews, we'll show you how to create goals for your employees (based on a particular time period).

Workflows are customized to allowing you to choose when you review your employees. Once that date is met, managers would see their bell with a number on it indicating they had things to do, like performance reviews.

## How to Fill Out a Performance Review

1. Select the  to start a review.  
*The window below displays.*



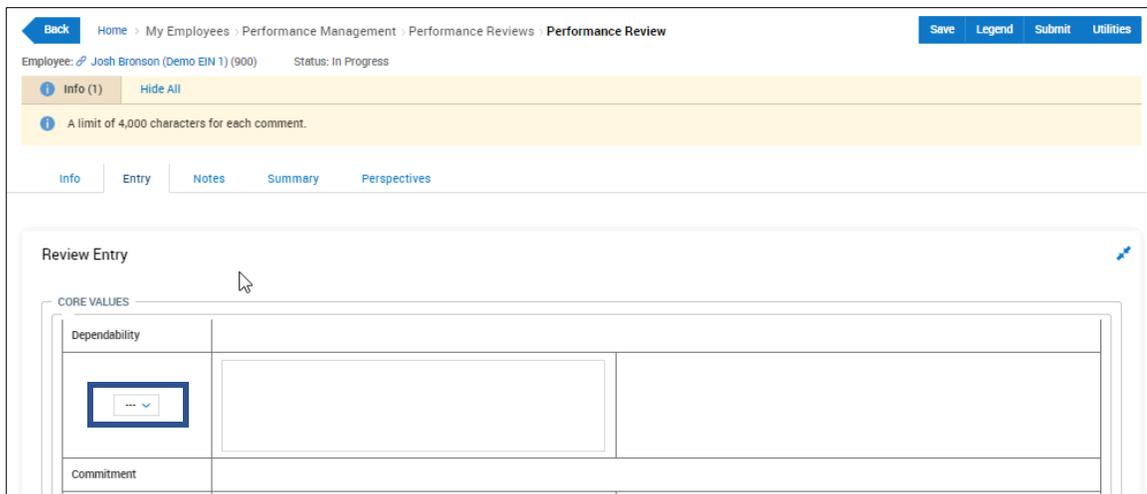
Back Home > My Reports > System > System Utilities > All To Do Items

Rows On Page: 20 Showing: 1-20 of 49 Page: 1 of 3 Refresh Data Full Screen [Default] Settings

Username	To Do Type	Description
jbronson	Workflow: Performance Review Request	Employee: Josh Bronson (Demo EIN 1) (900) Name: Josh Bronson: Quarterly Review (6/9/2012) Scheduled Date: 06/09/2012

REVIEW

2. Select the **Review** button to begin.  
*The window below displays. This is the area where you will fill out the review. Core values, competencies, and goals can all be customized in HR Setup.*



Back Home > My Employees > Performance Management > Performance Reviews > Performance Review Save Legend Submit Utilities

Employee: Josh Bronson (Demo EIN 1) (900) Status: In Progress

Info (1) Hide All

A limit of 4,000 characters for each comment.

Info Entry Notes Summary Perspectives

Review Entry

CORE VALUES

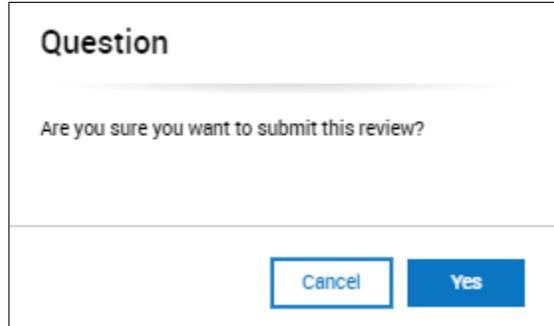
Dependability

Commitment

3. Under Core Values, select the appropriate option under the drop down (these are also customizable options.)
4. Enter any descriptive text to explain why you chose the drop-down option. This is not a required field.
5. Continue through the review until complete.

If you want to save your work to complete the review later, select **Save**. This will not submit the review to the next reviewer in line. It's simply a way for you to save and return to finish it later. If you

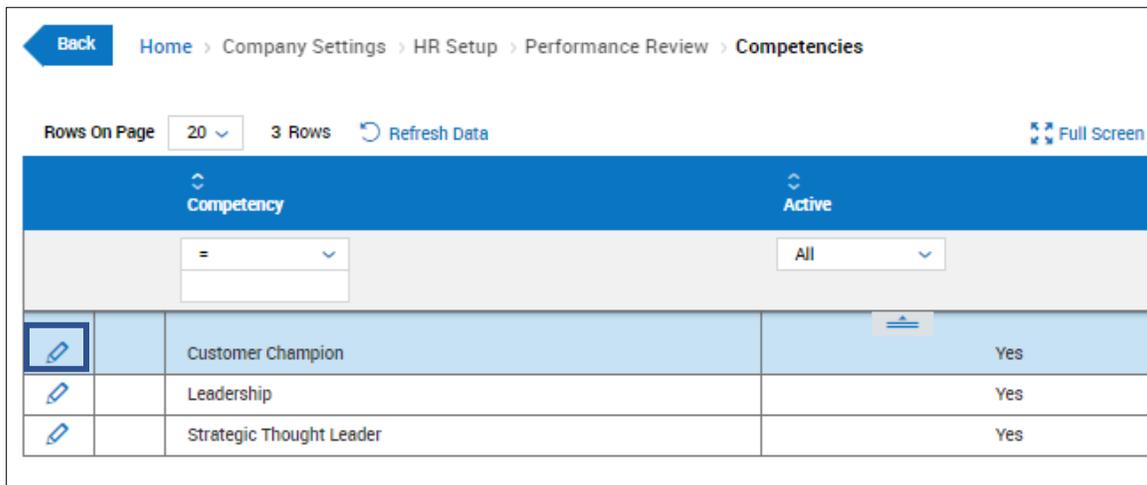
want to submit the review to the next level, select **Submit**. If you select submit you will receive the following popup menu.



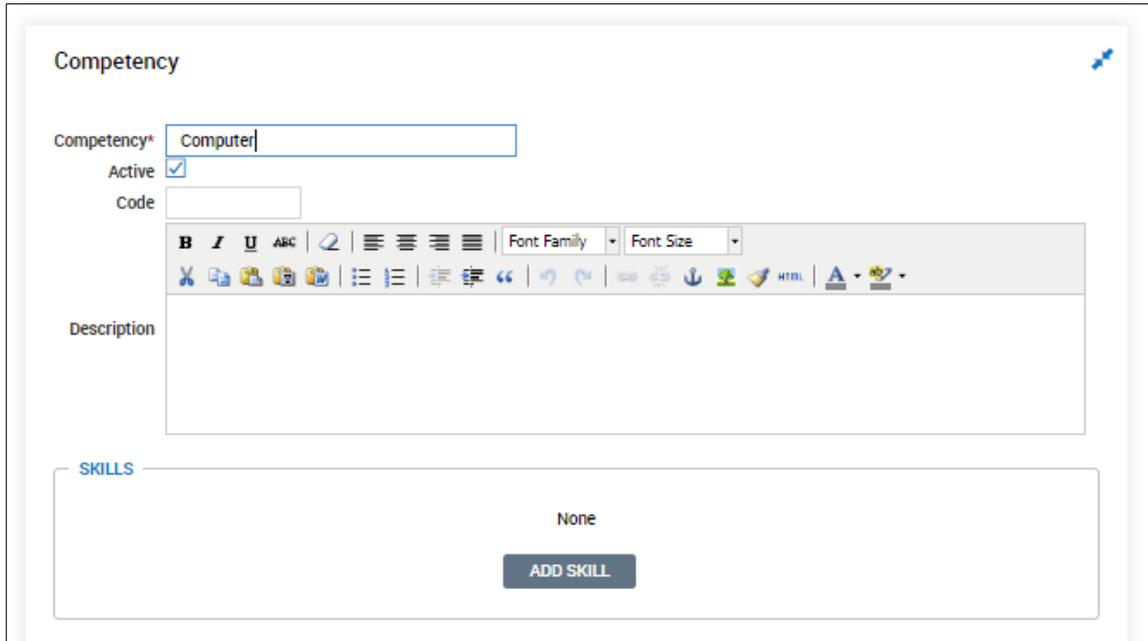
6. Select **Yes** to push the review forward to the next manager in line to review it.

## How to Customize Performance Reviews

1. Select the hamburger menu.
2. Select **Company Settings**.
3. Select **HR Setup**.
4. Select **Performance Review**.
5. Select **Competencies**.  
*The window below is displayed.*

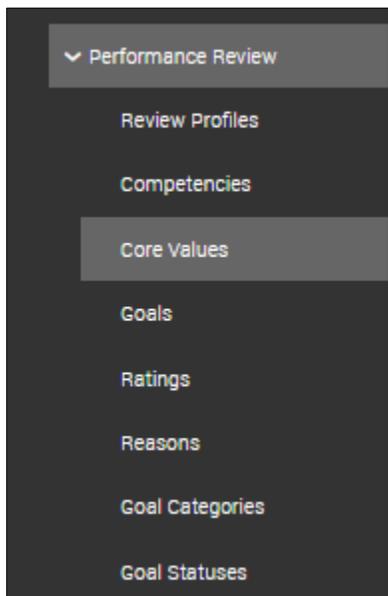


6. Select the pencil icon to make edits to the competency.
7. Select the **Add New** button on the top right corner to create a new competency.  
*The window below is displayed.*



8. Enter all the applicable information regarding the competency you want to include on the review.
9. Select the **Save** button on the top right corner.
10. Select **Back**.

Adding Core Values, Goals, etc., are all the same process and under the same **Performance Review** menu option as shown below.

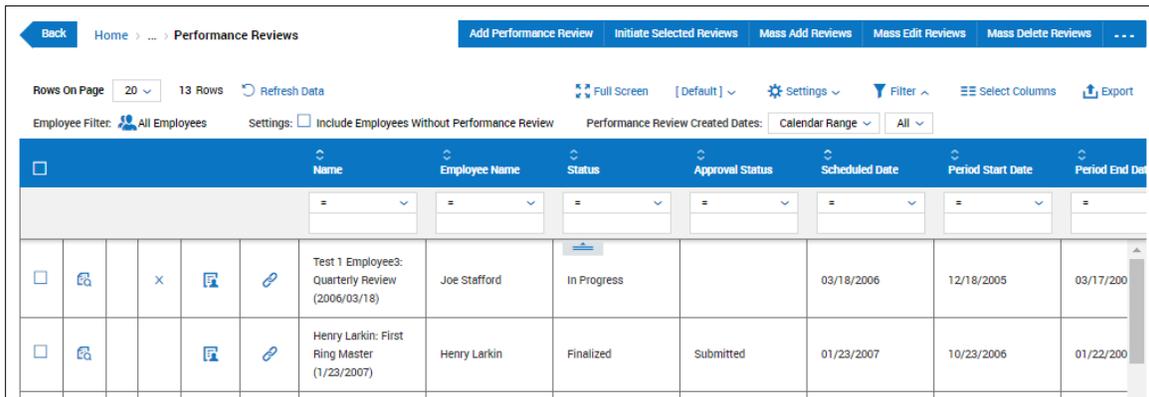


## Performance Review Report

This report will display the details of performance reviews such as Entry Comments, General Comments, Core Values, Goals, Competencies, Review Rating, Finalizer and Notes. From this report, managers can view a performance score prior to the finalization of the review. The Review Step Final Average and Overall Final Average can be added by clicking Select Columns and then adding the columns from the Available Columns section.

1. Select the hamburger menu.
2. Select **My Reports**.
3. Select **HR**.
4. Select **Performance Reviews Report**.

*The window below is displayed.*



		Name	Employee Name	Status	Approval Status	Scheduled Date	Period Start Date	Period End Date
<input type="checkbox"/>		Test 1 Employee3: Quarterly Review (2006/03/18)	Joe Stafford	In Progress		03/18/2006	12/18/2005	03/17/200
<input type="checkbox"/>		Henry Larkin: First Ring Master (1/23/2007)	Henry Larkin	Finalized	Submitted	01/23/2007	10/23/2006	01/22/200

This report will display the status of all the reviews, allow you to make changes to reviews, see which reviews need to still be completed, or finalized.

5. Select this button  to jump to the details of the review for an individual.
6. Select the **Summary** tab to view the information all in one location.

*The window below is displayed.*

[Back](#) [Home](#) > [My Employees](#) > [Performance Management](#) > [Performance Reviews](#) > **Performance Review**
[Unfinalize](#) [Utilities](#)

Employee: [Henry Larkin \(Demo EIN 1\) \(500\)](#) Status: Finalized

[Info](#) [Notes](#) **[Summary](#)** [Perspectives](#)

### Review Summary

	Step 1: 10.00% Employee (Henry Larkin (Demo EIN 1))	Step 2: 75.00% Manager 1 (Paul Peterson (Demo EIN 1))	Step 3: 15.00% Specific Person (Kathy Watts (Demo EIN 1))
<b>CORE VALUES (30.00%)</b>			
	Exceeds Expectations (4.00) <a href="#">[consistently deliver more...]</a>	Exceeds Expectations (4.00) <a href="#">[Strong work ethic/loyalty]</a>	Exceeds Expectations (4.00) <a href="#">[x]</a>
	Outstanding (5.00) <a href="#">[strong customer advocate...]</a>	Exceeds Expectations (4.00) <a href="#">[Henry is very...]</a>	Exceeds Expectations (4.00) <a href="#">[x]</a>
	Exceeds Expectations (4.00) <a href="#">[rarely late or...]</a>	Outstanding (5.00) <a href="#">[can always count...]</a>	Exceeds Expectations (4.00) <a href="#">[x]</a>
	Outstanding (5.00) <a href="#">[if I don't...]</a>	Outstanding (5.00) <a href="#">[have never had...]</a>	Exceeds Expectations (4.00) <a href="#">[x]</a>
<b>AVERAGE</b>			

This is the summary of their entire review, what the employee wrote about themselves, and their two managers. Scroll to the bottom to see the final comments, new compensation, and job title. Select the **Back** button to return the review list.

[Back](#) [Home](#) > ... > **Performance Reviews**
[Add Performance Review](#) [Initiate Selected Reviews](#) [Mass Add](#)

[Hide All](#)

Rows On Page:  13 Rows [Refresh Data](#)
[Full Screen](#) [Default] [Settings](#)

Employee Filter: [All Employees](#) Settings:  [Include Employees Without Performance Review](#)
 Performance Review Created Dates:  [Calendar](#)

<input type="checkbox"/>	Name	Employee Name	Status	Approval Status
<input type="checkbox"/>	Ring Master (1/23/2007)	Henry Larkin	Finalized	Submitted
<input type="checkbox"/>	Ashley Nelson: First Ring Leader (4/8/2007)	Ashley Nelson	Finalized	Submitted
<input type="checkbox"/>	Henry Larkin: Ring Master (10/23/2010)	Henry Larkin	Finalized	Submitted

- Select the checkbox, highlighted above, to display all employees who do not have a performance review completed.

You have completed reviewing the Performance Review report.

## Exporting Reviews

Let's export all the performance reviews.

1. From the Performance Reviews page, select the export button on the top right corner.  
*The popup window displays.*

### Export Report

Available Export Formats

<input type="checkbox"/>	.csv	CSV	Comma Delimited	.csv	
<input type="checkbox"/>	.xls	Excel 97-2007	Microsoft Excel 97-2007 Workbook	.xls	
<input type="checkbox"/>	.xlsx	Excel 2007	Microsoft Excel 2007 Workbook	.xlsx	
<input checked="" type="checkbox"/>	.pdf	PDF	Acrobat Reader	.pdf	Export
<input type="checkbox"/>	.html	HTML	HTML Table	.html	
<input type="checkbox"/>	.html	HTML (Paged)	HTML (Paged)	.html	
<input type="checkbox"/>	.xml	XML	XML	.xml	
<input type="checkbox"/>	.txt	Text	Fixed Width	.txt	
<input type="checkbox"/>	.txt	Text (Tab Delimited)	Tab Delimited	.txt	

Display Information Header/Footer  
 Use Unicode

2. Select the PDF option.
3. From the bottom of the browser window, select the file to open.

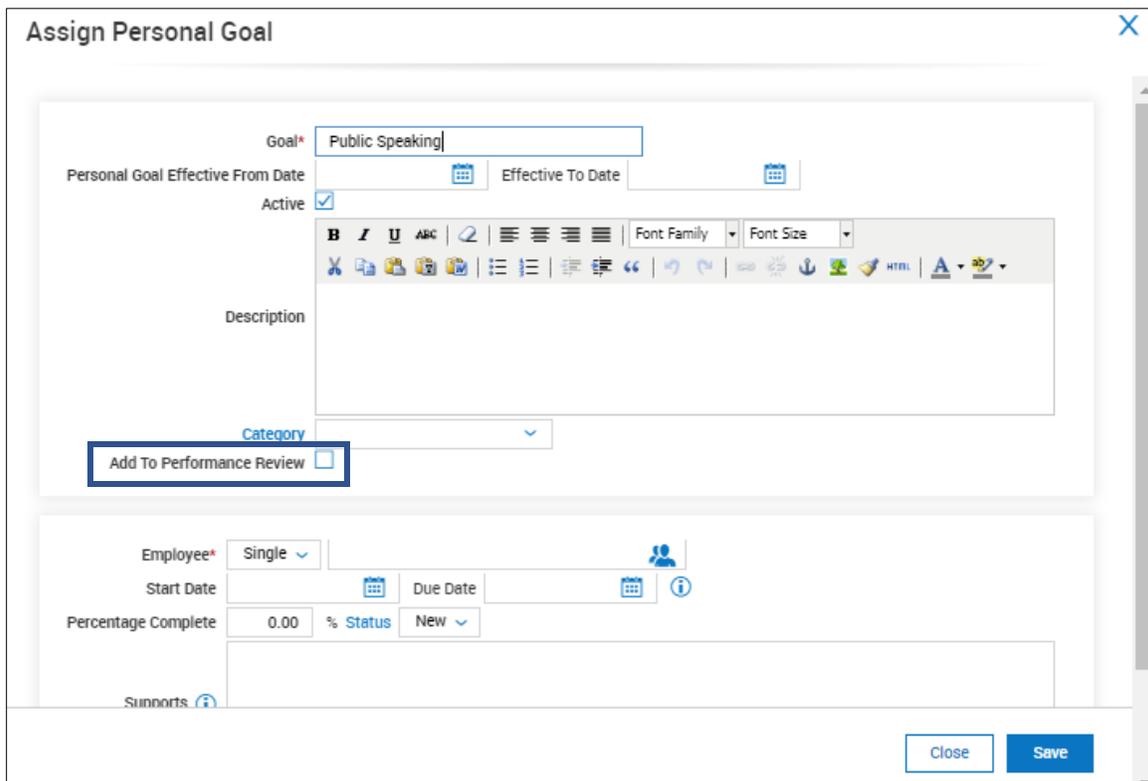
You have completed the exporting process.

## Setting up a Personal Goal

Let's assume we've reviewed our employees and want to create new goals for the upcoming year. We can do this from the Performance Development Report. You can assign them to a group of people or one at a time. Let's look at this feature now.

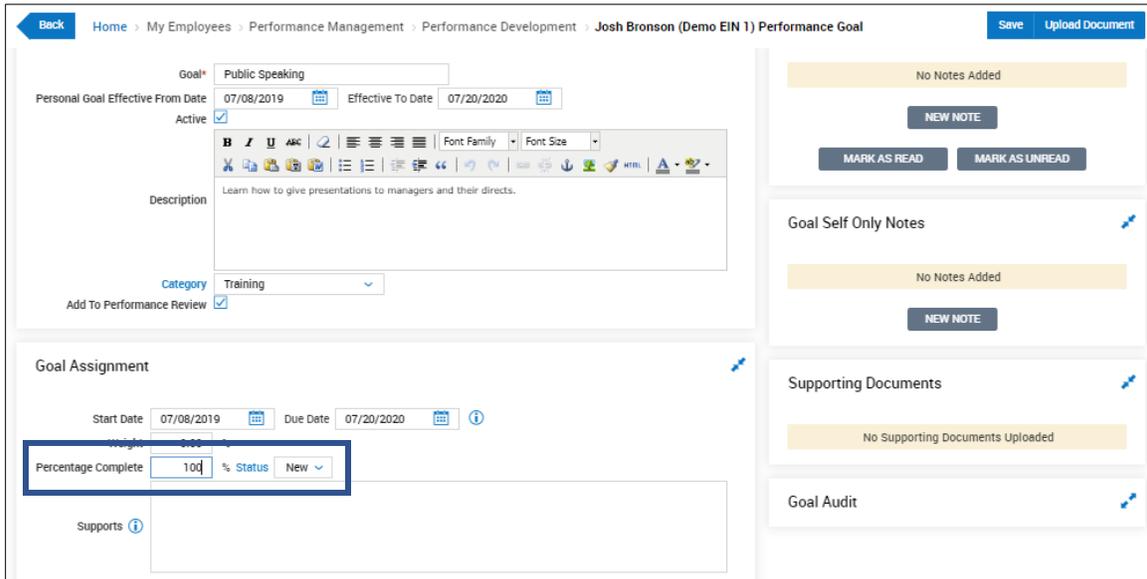
1. Select the hamburger menu.
2. Select **My Employees**.
3. Select **Performance Management**.
4. Select **Performance Development**.
5. Select the **Assign Personal Goal** button.

*The window below displays.*



6. Fill out the popup window with the applicable information.
7. Select **Add To Performance Review**.
8. Select the  to select an individual or group of employees.
9. Select **Add Selected**.
10. Select **Use Filter**.
11. Apply a start and due date.
12. Select **Save**.

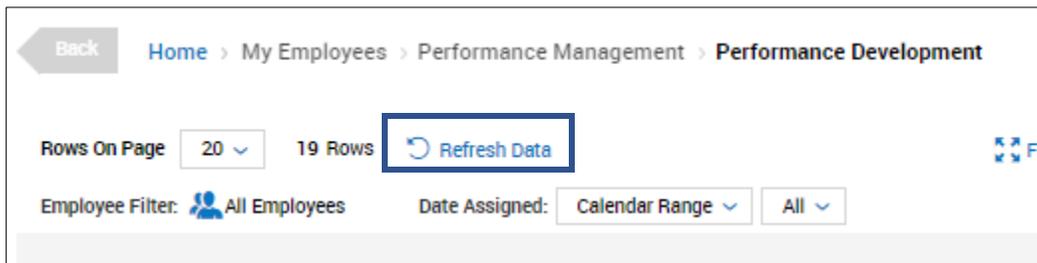
Now that you've returned to the Performance Development window, you can see that the goal has been applied to those individuals you selected. As progress develops on the goal, select the pencil icon next to the individual.



The screenshot shows the 'Performance Goal' configuration page for 'Public Speaking'. The goal is active and set to be effective from 07/08/2019 to 07/20/2020. The description is 'Learn how to give presentations to managers and their directs.' The category is 'Training' and it is added to performance review. The goal assignment section shows a start date of 07/08/2019 and a due date of 07/20/2020. The 'Percentage Complete' is set to 100%. The right sidebar contains sections for 'No Notes Added', 'Goal Self Only Notes', 'Supporting Documents', and 'Goal Audit', each with a 'NEW NOTE' button.

13. Select the **Save** button.

14. Select **Back**.



The screenshot shows the 'Performance Development' list view. The breadcrumb trail is 'Home > My Employees > Performance Management > Performance Development'. The 'Rows On Page' is set to 20, and there are 19 rows displayed. A 'Refresh Data' button is highlighted with a blue box. The 'Employee Filter' is set to 'All Employees' and the 'Date Assigned' filter is set to 'Calendar Range'.

15. Select **Refresh Data** to see the updated information displayed.

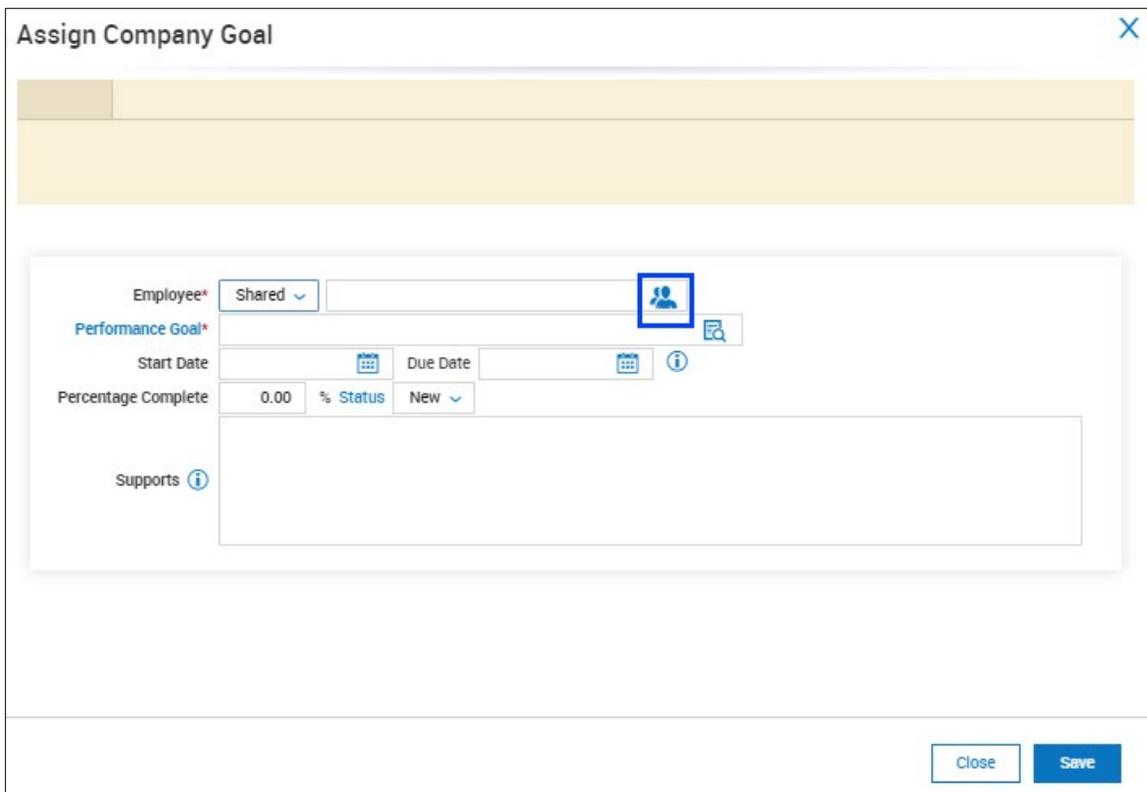
You have completed the individual goal set up process.

## Assign a Company Goal

Now let's assign a company goal.

1. Select the hamburger menu.
2. Select **My Employees**.
3. Select **Performance Management**.
4. Select **Performance Development**.
5. Select the **Assign Company Goal** button.

*The window below displays.*



6. Select the drop down next to employee and select the **Shared** option.
7. Select the icon highlighted above to select your employees.

*The window displays below.*

**Employees Filter**

Not Selected | Selected (0) | Saved Lists | Company Groups | **Company Profiles** | Advanced Filters

Rows On Page: 10 | 1-10 of 1421 | Page 1 of 143

<input type="checkbox"/>	Employee Id	Badge	Username	First Name	Last Name
<input type="checkbox"/>	starts with	=	=	starts with	starts with
<input type="checkbox"/>	900		jbronson	Josh	Bronson
<input type="checkbox"/>	700		ldubois	Larry	Dubois
<input type="checkbox"/>	3000		Employee1	Test 1	Employee1
<input type="checkbox"/>	3009		Employee10	Test 1	Employee10

Save List As | Add Selected | Use Filter

8. Select **Company Profiles**.
9. Choose the flag icon next to the profile you want to select.

**Please note** that a shared goal implies that everyone is working on it, as a group, at the same pace. So, when you update the percentage complete to one person, it applies that same percentage to all those who share that goal.

10. Select **Save**.  
*The window below displays.*

Performance Goal Lookup X

Rows On Page  2 Rows ⚙️ 📄

<input type="checkbox"/>	Goal Name	Goal Description	Goal Type	Goal Category
<input type="checkbox"/>	=	=	All	=
<input checked="" type="checkbox"/>	20% 1st quarter growth		Company	
<input type="checkbox"/>	Completed Advanced Driver's Safety Training	Advanced training in safety while driving.	Company	Training

11. Select the checkbox next to the newly created goal (20% 1<sup>st</sup> Quarter Growth).
12. Select **Save**.
13. Apply a start and due date.
14. Select **Save**.

You have completed the company goal set up process.