UCC

University College Cork, Ireland

Coláiste na hOllscoile Corcaigh

e-Performance User Guide

Version 1: March 2017

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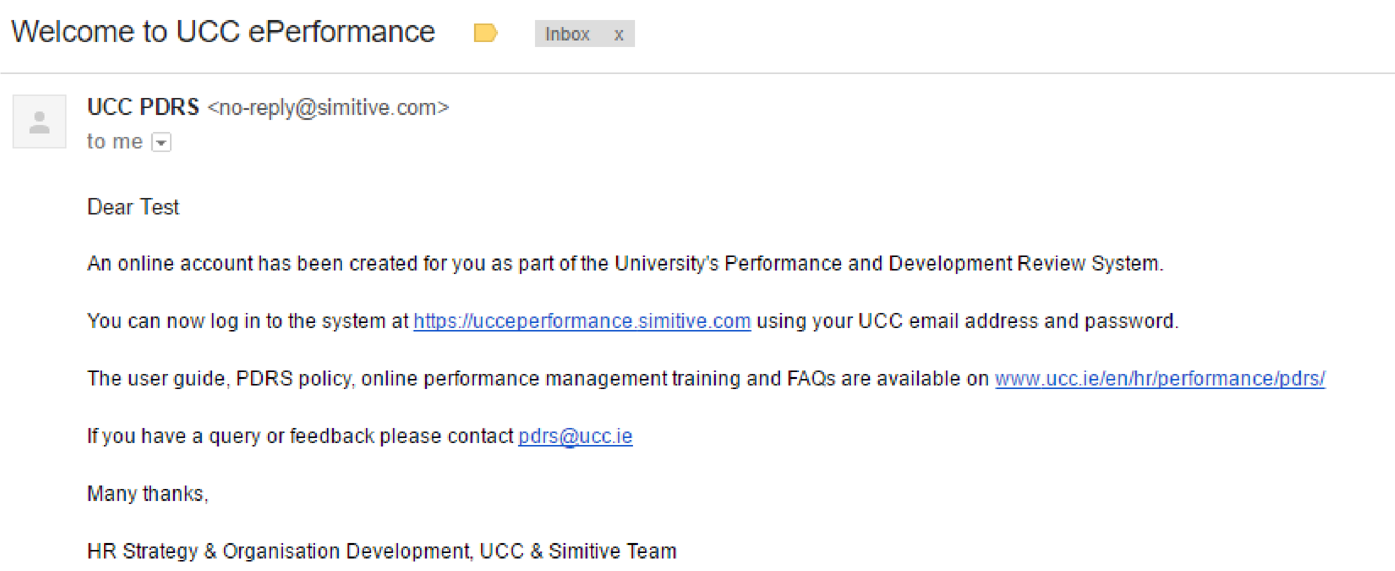
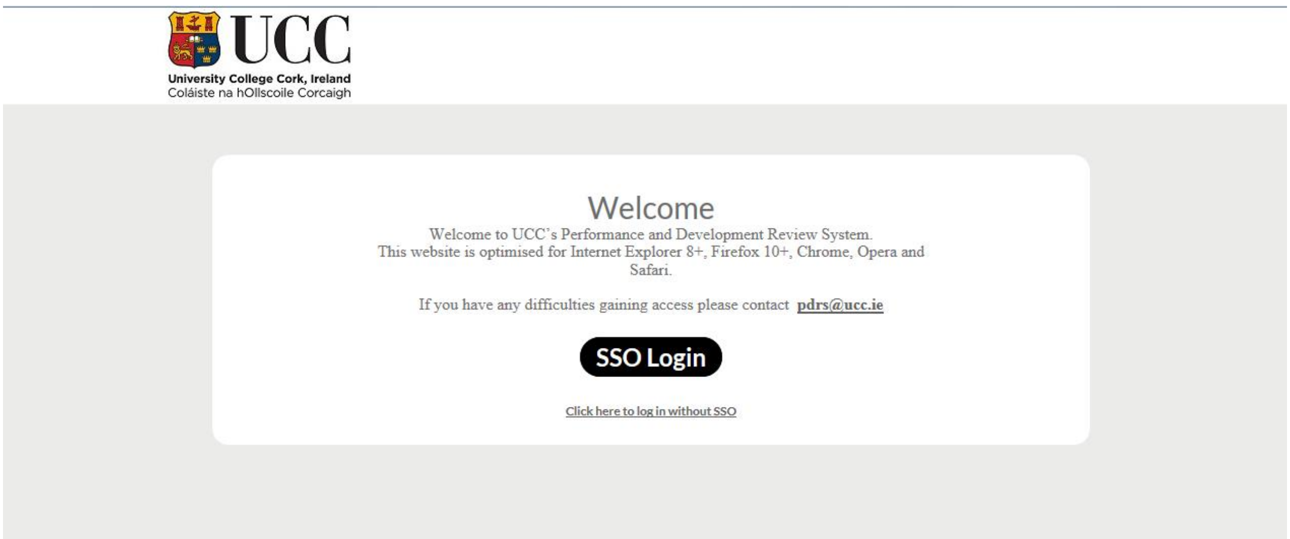
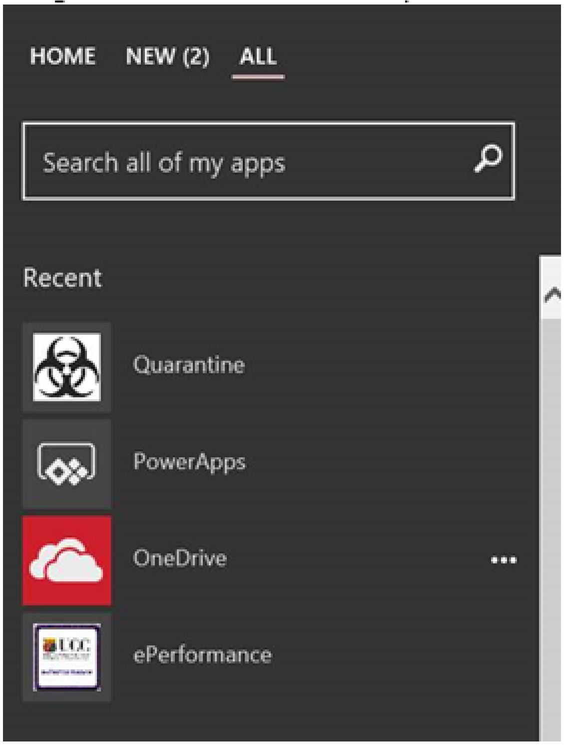
How to login for the first time

A welcome email has been sent to all new users set up on the system. Clicking on the link will take you to the following page, where you can click on 'SSO Login' to login using your UCC email address and password. The system will then take you to your **Me** Page.





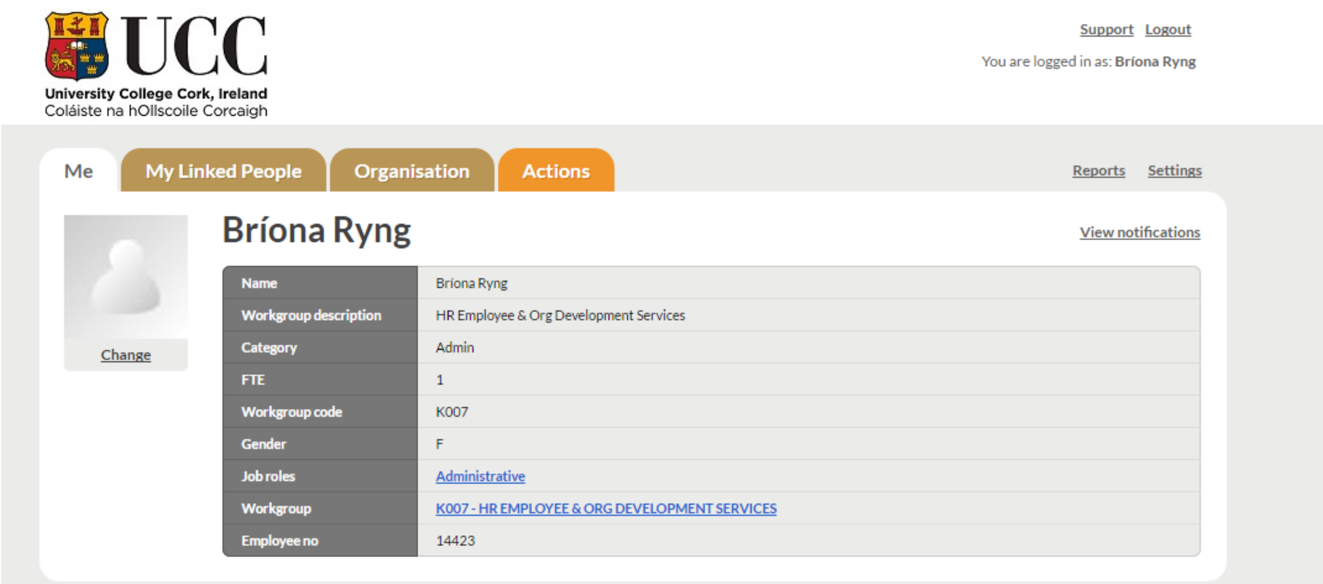
The system may also be accessed through 'My Apps' on Office 365.



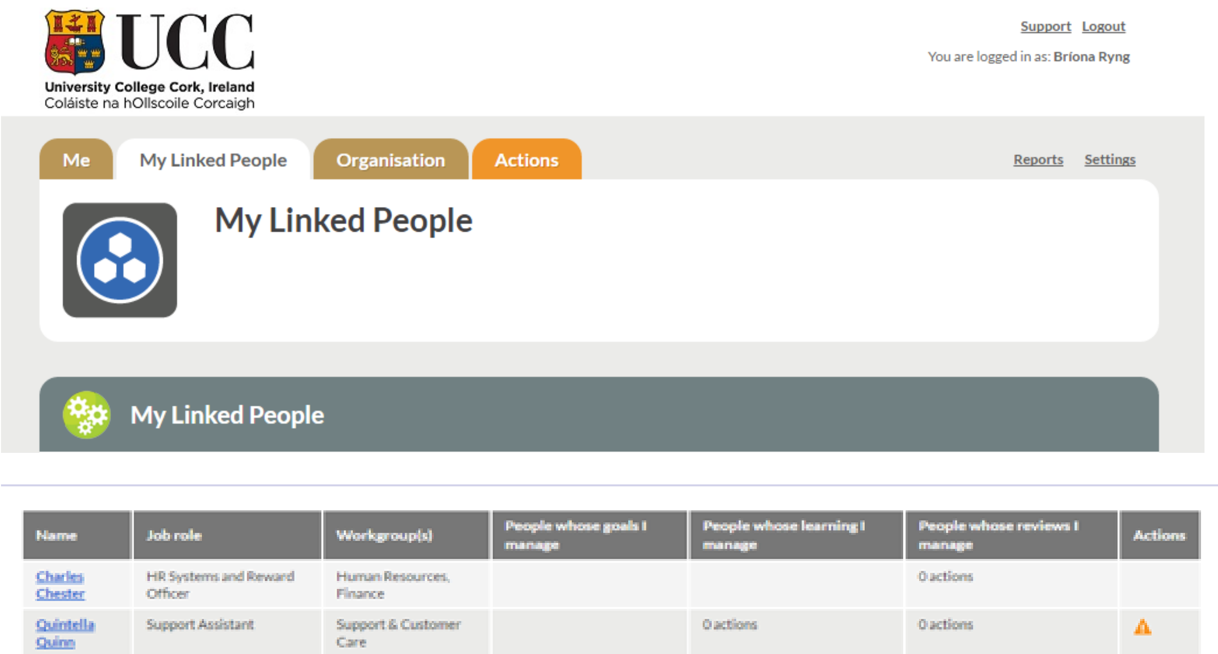
Navigating the System

The **Me** page works as a home page and can be used to navigate to all aspects of the site. This can include:

- **My Linked People** - Visible only to Reviewers and Senior Managers / Workflow Commenters.
- **My organisation** - This tab displays the organisational structure of your company/ university (this tab may not be visible to all users).
- **Actions** - Visible to every user, this page notifies you of any actions that require an update/approval.
- **Reports** - Visible to Reviewers and Senior Managers / Workflow Commenters.
- **Settings** – Visible to every user. Click here to access system settings.
- **System Support –** you can log any queries on the system which will be addressed by your HR Department / Online Review System Team.
- **Logout –** use this link to log out from your system account.



My linked people



Name	Job role	Workgroup(s)	People whose goals I manage	People whose learning I manage	People whose reviews I manage	Actions
Charles Chester	HR Systems and Reward Officer	Human Resources, Finance			0 actions	
Quintella Quinn	Support Assistant	Support & Customer Care		0 actions	0 actions	

This section shows reviewers and supervisors, a list of their **Linked People**. If you are a reviewer, click on any of your reviewees' name to access their **Me** page and to view their progress and notes.

- **Users whose 'Reviews' I manage -** This section displays the user's review progress and whether they have any outstanding actions in relation to their review form.

- **Actions -** This section displays an orange triangle if there is an outstanding action for the reviewer in relation to a specific person they manage.

The **My Linked people** page has another section called **Review Comments**.

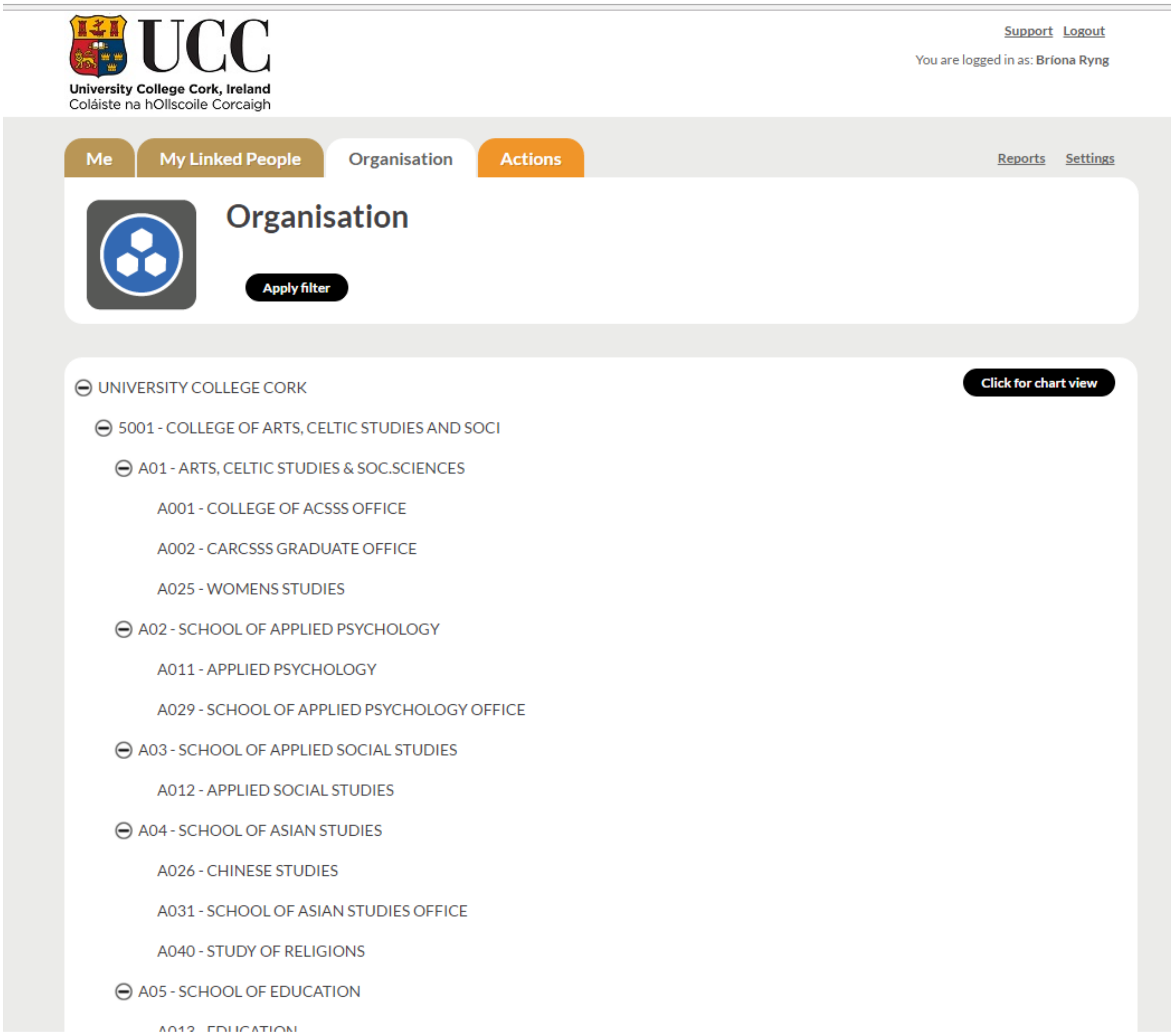
The section displayed below will only appear if the user is included in the workflow as an additional commenter / senior manager on a user's review form. The user's name will appear under this section when the review form has been finalised and the additional commenter has received an action to leave an overall comment.

Review Comments

Name	Review	Review period	Commented on
Clare Graves	Review Form Oct 14 - Sept 15	23/12/2014 - 31/12/2018	n/a comment now
Xavier Xander	Review Form Oct 14 - Sept 15	23/12/2014 - 31/12/2018	19/01/2016 view

My Organisation

This tab will show the structure of the university / organisation.



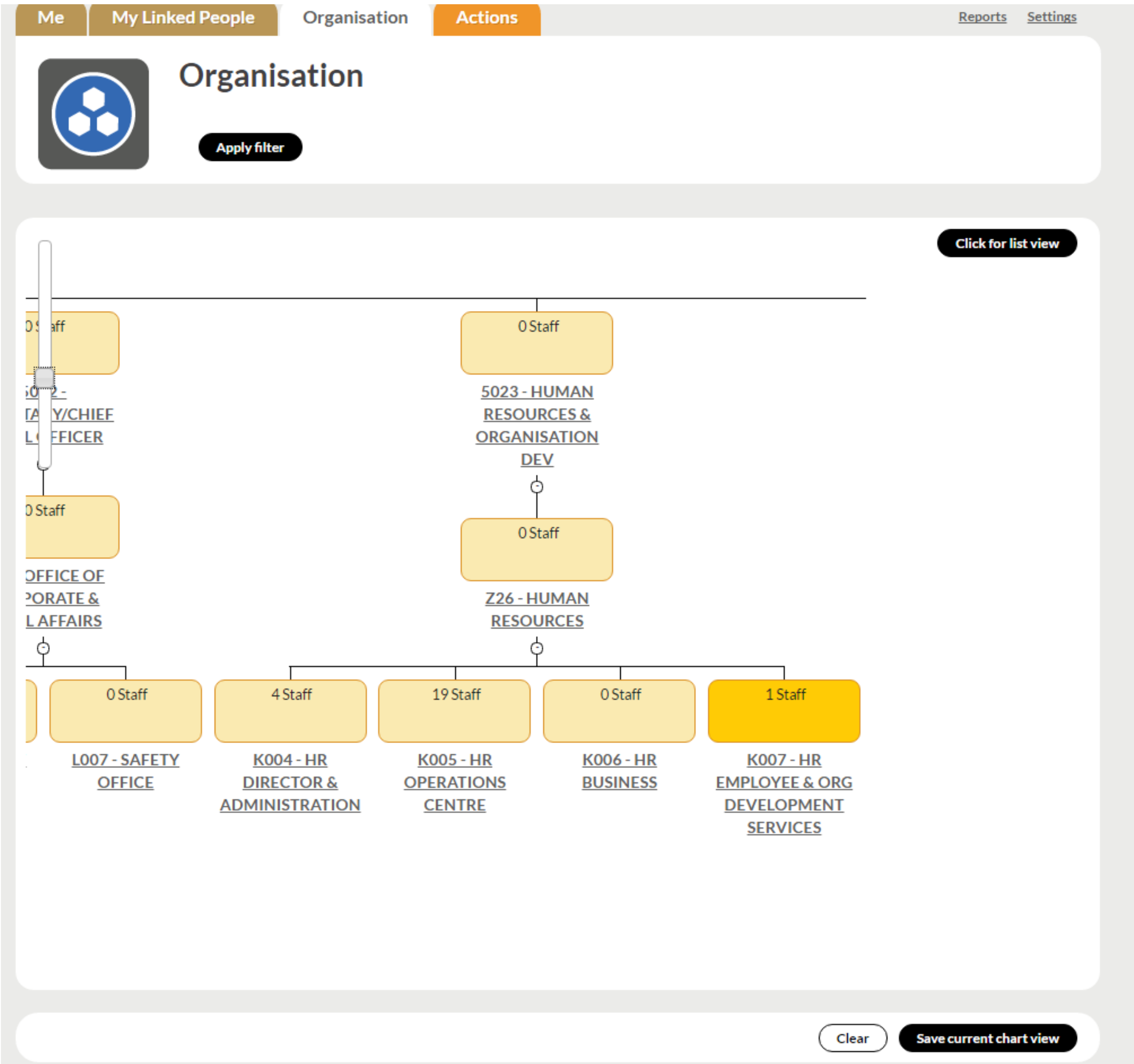
List view

It is possible to view workgroups through the organisational chart. Workgroups are considered to be the organisation's or university's departments or teams.

The chart view shown in the screenshot on the next page, displays the workgroup where you sit in the organisational structure highlighted in yellow.

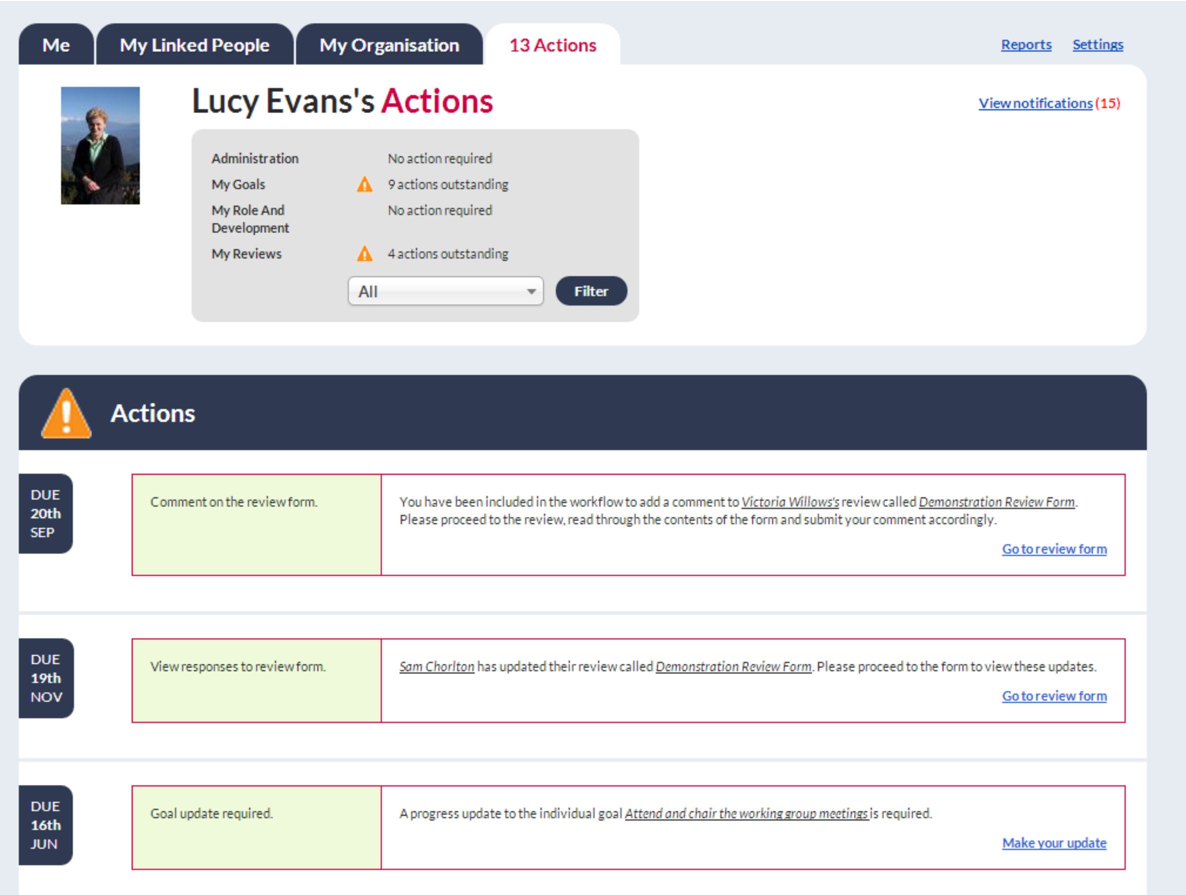
The **Save current chart view** button will save the current display of the chart for easier loading on re-visiting the page.

Chart view


Me
My Linked People
Organisation
Actions
Reports
Settings
Organisation
Apply filter
Click for list view
0 Staff
5023 - HUMAN RESOURCES & ORGANISATION DEV
0 Staff
Z26 - HUMAN RESOURCES
0 Staff
OFFICE OF
PORATE &
L AFFAIRS
0 Staff
L007 - SAFETY OFFICE
4 Staff
K004 - HR DIRECTOR & ADMINISTRATION
19 Staff
K005 - HR OPERATIONS CENTRE
0 Staff
K006 - HR BUSINESS
1 Staff
K007 - HR EMPLOYEE & ORG DEVELOPMENT SERVICES
Clear
Save current chart view

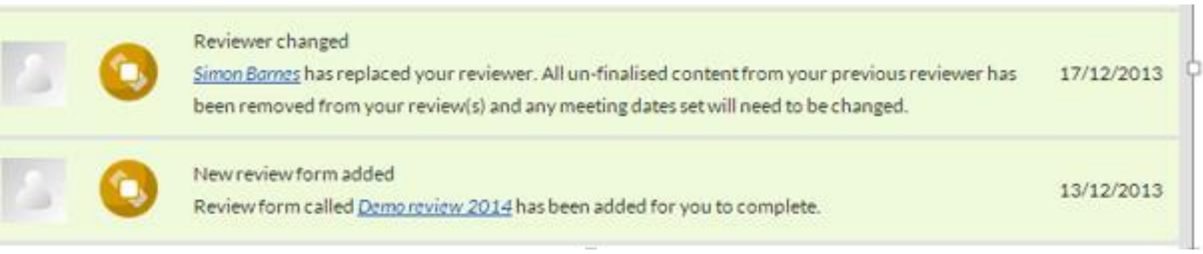
Actions

The **Actions** page displays any outstanding actions that you need to complete. These can be the need to view comments on a form or approve a meeting date. If the actions are not completed, a digest email will be generated. This is only generated for as long as the actions are outstanding. Once completed, actions will no longer appear in the email, but any new actions will.



Notifications can be viewed from either the **Actions** page or the **Me** Page. Unlike actions, which require something to be completed in order to progress, notifications highlight any relevant changes that have been made in the system that relate to your review form or notes.

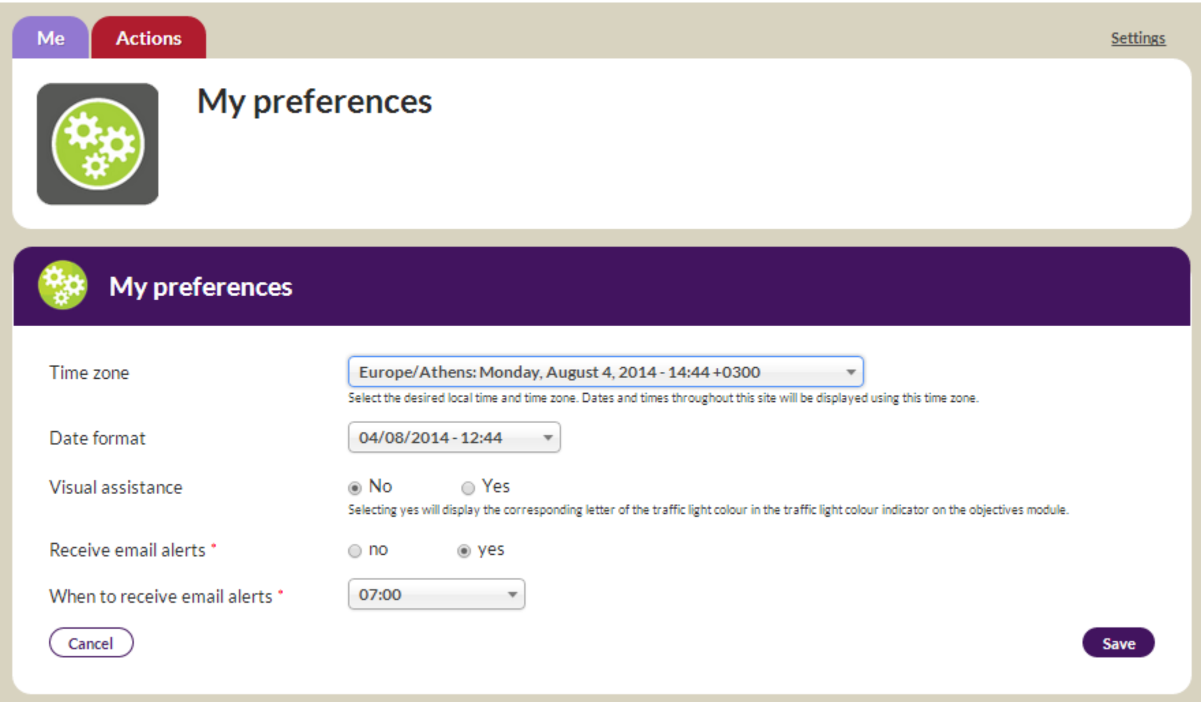
A number of example notifications are shown in the screenshot:



Settings

This page allows you to

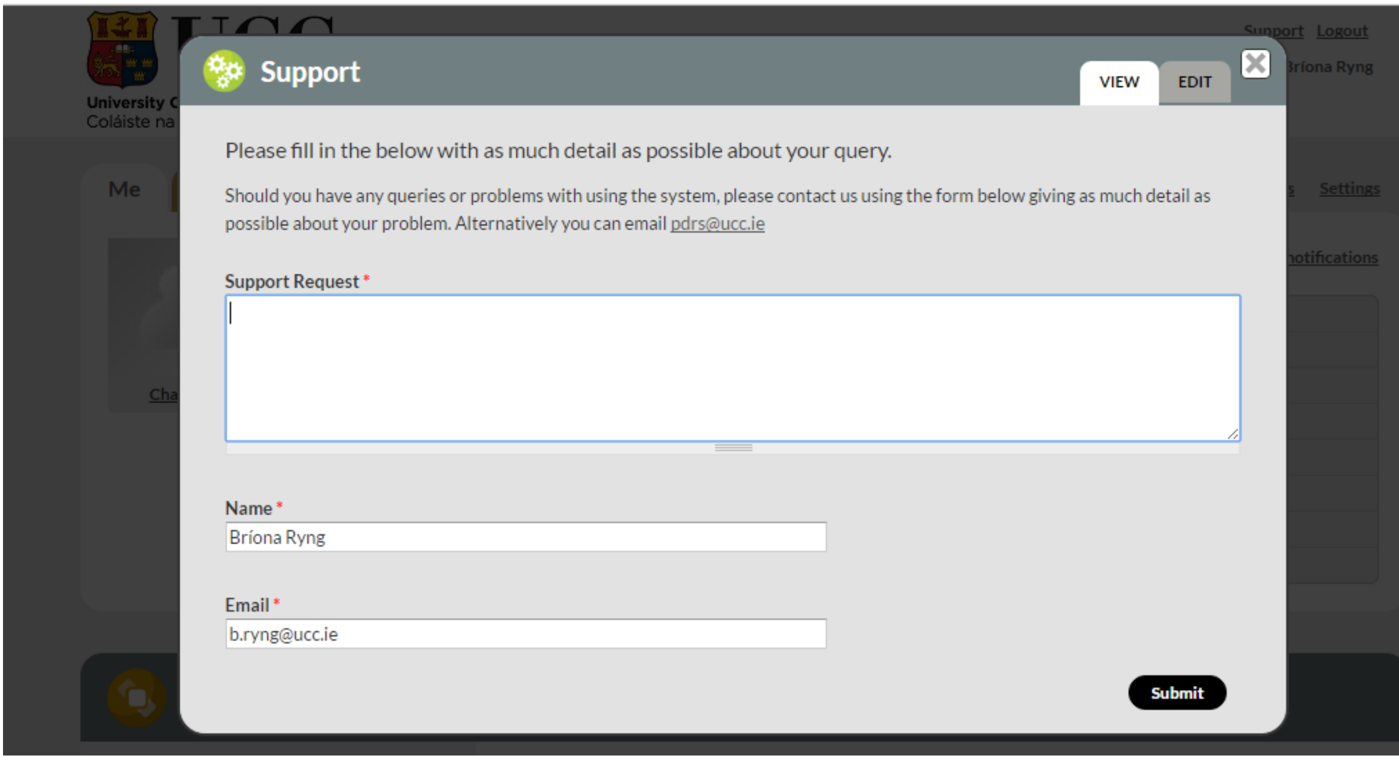
- Change the time zone
- Change the date format
- Decide whether you would like to receive the daily digest email (this will default to yes)
- The time to receive email alerts



Settings page > My preferences

Support

Should you have any queries or issues using the system, please click on the **Support** link at the top right of the page. The query will be sent to a dedicated university / organisational support team which will assist you with this issue.

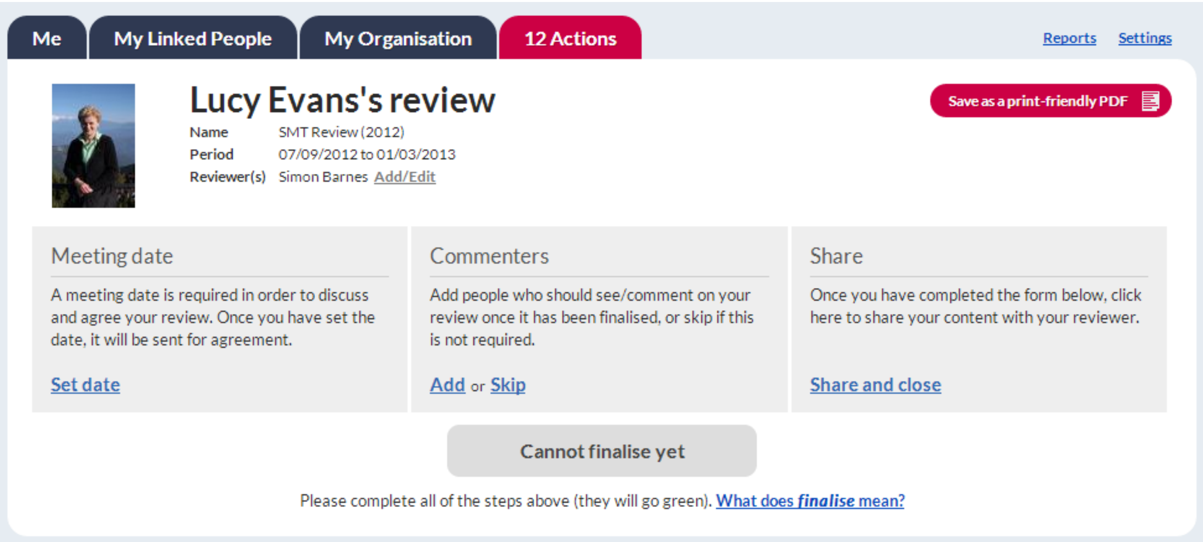


Me page/ Actions page > Support

Conducting a Performance Review

Logging in

On your **Me** page, scroll down to find the **Review** section and click on the form that has been allocated. On this form, there will be three grey boxes.



Me Page > Review form

Setting the meeting date

Setting the meeting date will turn the first box yellow - this means the date suggested has been sent to your reviewer for approval.

Commenters

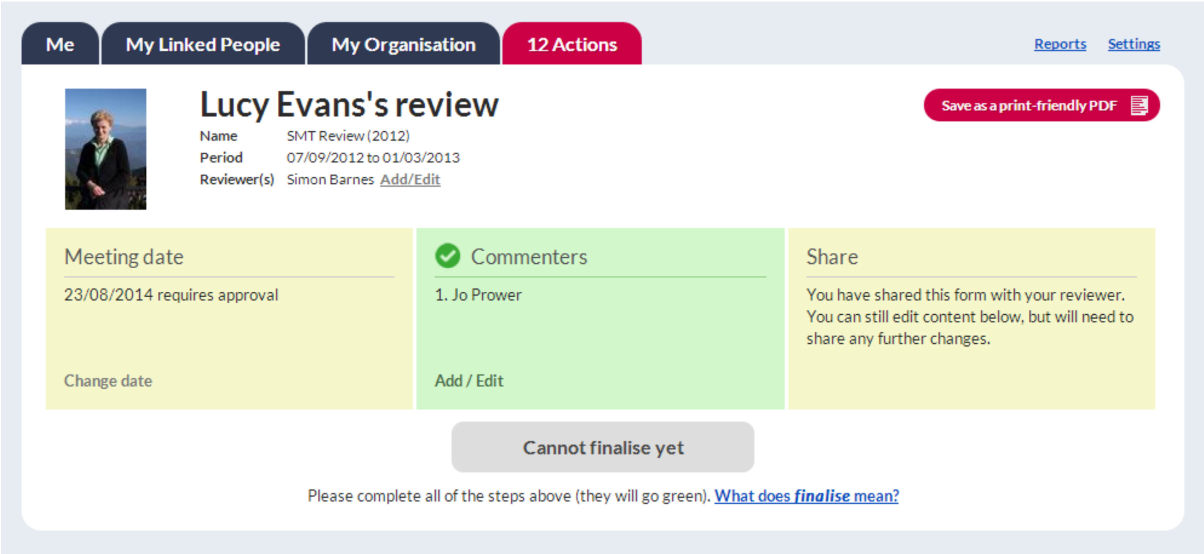
Adding additional commenters to the workflow will change the middle box to green. If commenters have already been set and the box is locked, it will be green. If no commenters are needed click **Skip** this step to turn the box green.

Filling out the form

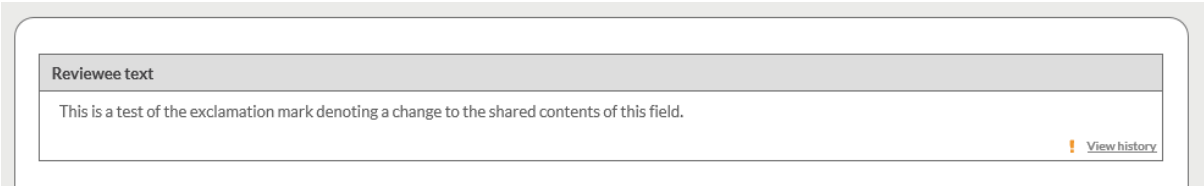
Follow the instructions on the form to complete it. The auto-save function will save every half a second after typing anything in the form. Click **Save** or **Save & Close** and come back later to continue filling it out. Save and close will save any changes and close the form, returning to the Me page.

Sharing the review form

The content written will only be visible to the reviewer upon clicking **Share and Close**. Once the form has been shared the third box will turn green. If any changes are made to the form the box will turn yellow, quickly indicating whether or not the latest changes have been shared.

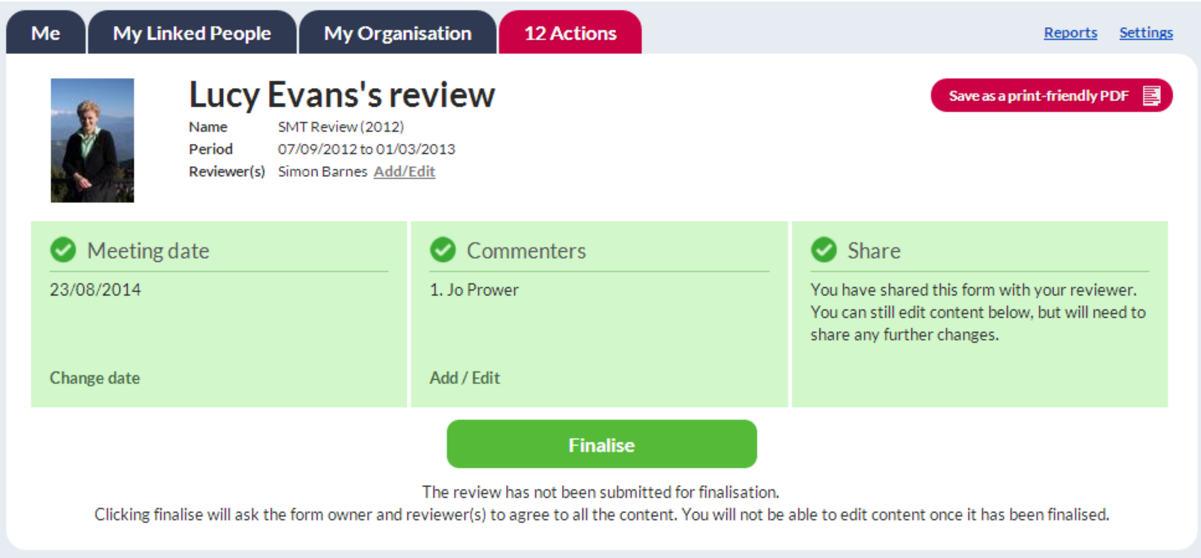


Any fields which have been changed since the last share will have the following symbol next to the **view history** link.



Finalising the form

Once all changes have been shared and all boxes are green, you will be able to finalise the review form.



Overall comment made by the workflow commenter

If a workflow commenter has been added to the form, once the form has been finalised the workflow commenters will receive an action to leave an overall comment. Once this comment has been made, you and your reviewer will receive an action to view this comment.

Finalised and Archived review forms

On the **Me** page, under the Review section click on **View finalised reviews** button to view finalised review forms from previous years

My Reviews

My Appraisals

Review Title	Appraisal Period	Appraiser(s)	Action
SMT Review (2012)	07/09/2012 to 01/03/2013	Simon Barnes	
Review 2012/13	30/09/2012 to 27/02/2013	Simon Barnes	
Demo review 2014	13/12/2013 to 13/12/2015	Simon Barnes, Richard Evans	

Hide archived appraisals View finalised appraisals

Review Title	Appraisal Period	Appraiser(s)	Date Archived
Professional Review Form	17/03/2014 to 17/03/2015	Simon Barnes	12/08/2014

These review forms are locked and can no longer be edited by you or your reviewer. They will be visible to all parties involved for future reference.

To view your archived or de-activated review forms click on the **View archived review forms** button.

On the Review Section on your Me page you are able to view the current status of your review form. Please find example shown below.

My Reviews

My Appraisals

Review Title	Appraisal Period	Appraiser(s)	Action
SMT Review (2012)	07/09/2012 to 01/03/2013	Victoria Willows	The appraiser has shared changes with you
Review 2012/13	30/09/2012 to 27/02/2013	Victoria Willows	You have not shared latest changes with the appraiser
Demo review 2014	13/12/2013 to 13/12/2015	Victoria Willows, Richard Evans	You have not shared latest changes with the appraiser

My Notes

View finalised appraisals

Notes

Whilst the main focus of your interactions with your manager will focus on your review, it is important that you both are able to record more general notes relating to progress during the review period. Examples of these include recording notes meetings, personal documentation relating to aspects of your work or uploading a certificate or diploma. Equally, managers may wish to record or share notes with you relating to your work. You can keep notes private (the default behaviour) or share them with your manager / reviewer.

Any notes recorded on the system may fall under the University's Records Management Policy, therefore staff are reminded to maintain appropriate content and language in line with the IT Services Acceptable Usage Policy and Duty of Respect & Right to Dignity Policy.

How to add a note

1. On the **Me** Page, under the **Notes** section, click **Add note**.

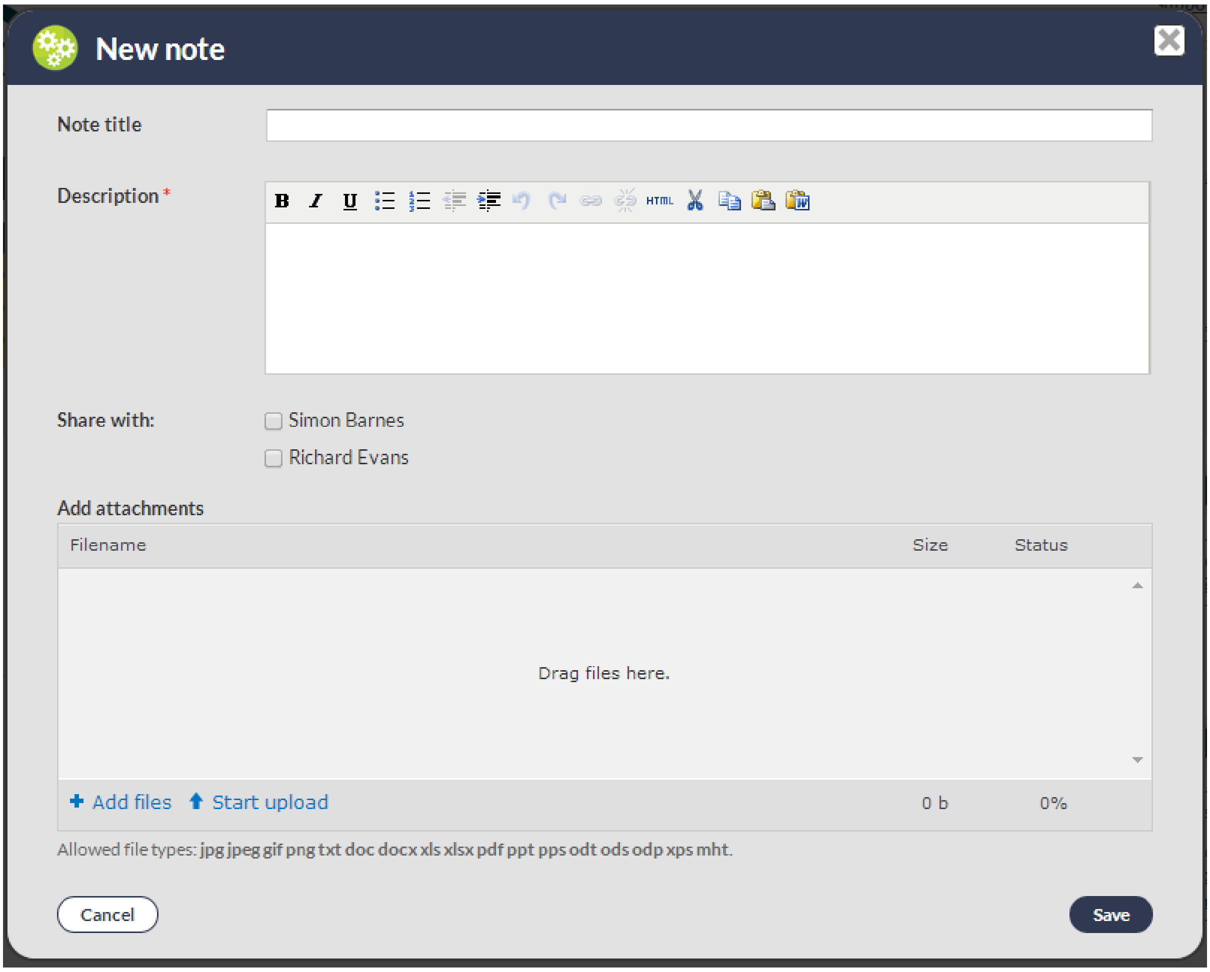
2. Complete each section. Each note will consist of:

- Note title
- Description
- Option to share

3. Attach supporting documents by clicking **Add files** and selecting the required file(s) - or dragging them into the attachment field - then clicking **Start upload,** files can be uploaded from either Google Drive or the local drive.

4. You can **Cancel** to exit without saving your note, or **Save**. If you close the pop-up or navigate away, it will not save the note.

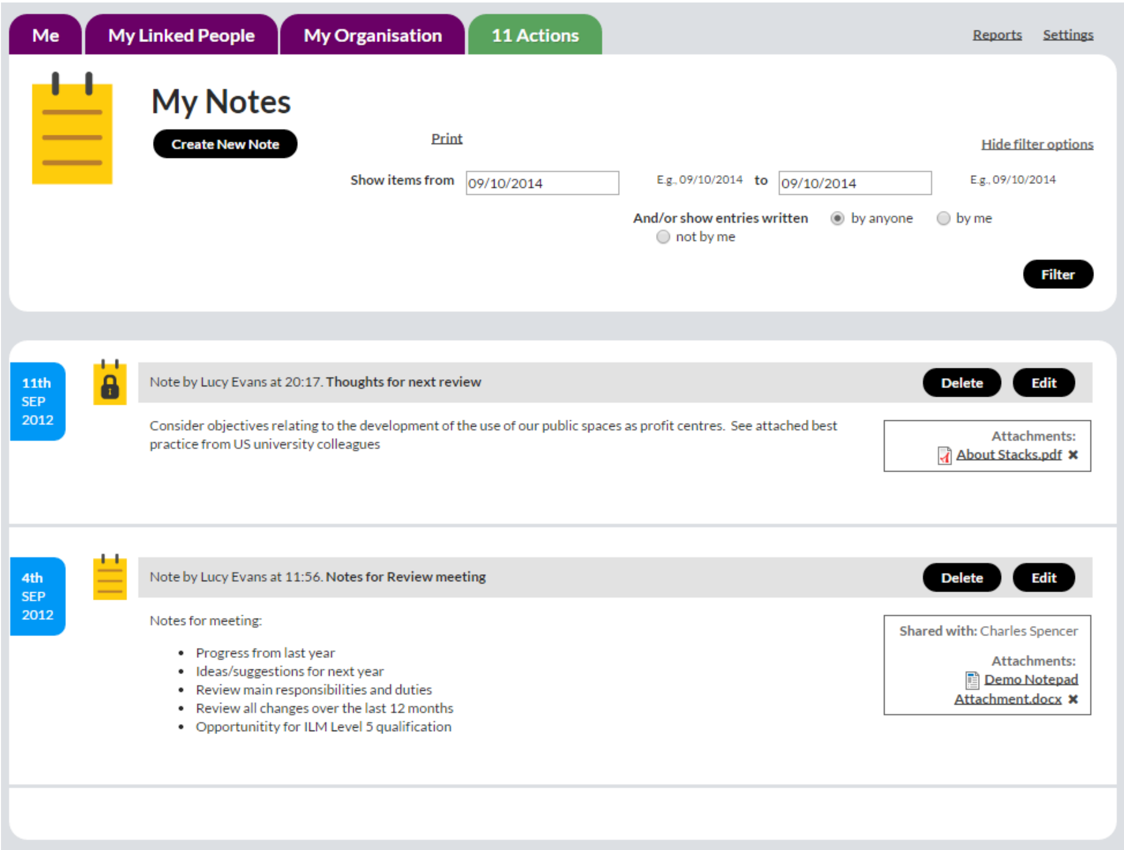
*The default behaviour is for the note to be private and only visible to supervisors if shared. Supervisors can also create and share a note with you which will appear on your **Me** page **My Notes** section.



Me Page > My Notes > View my notes > Create New Note

Filter notes

On the **Notes** page, you will have the ability to filter through these by date and by the user who wrote the note.



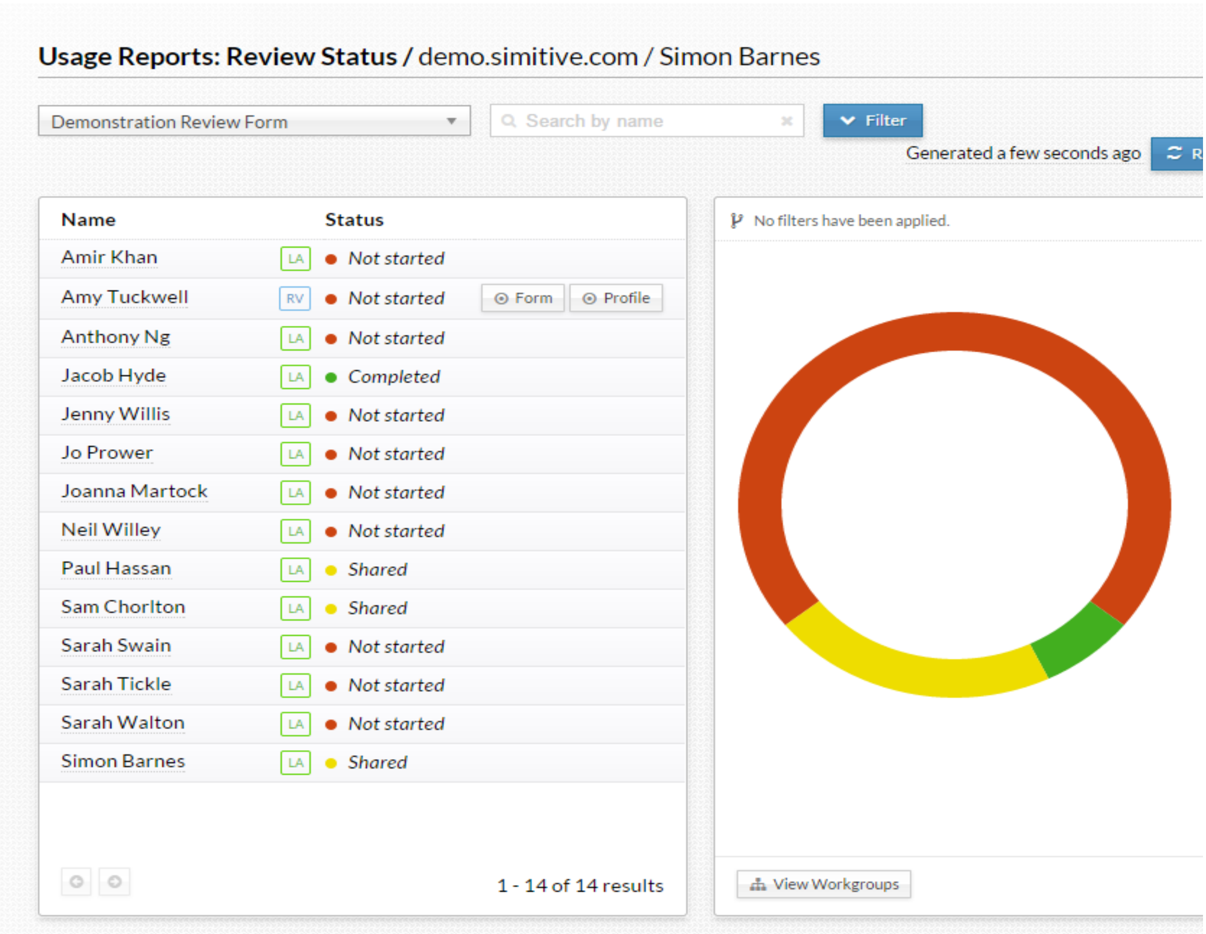
Reports

Usage Report

Reports/Usage report

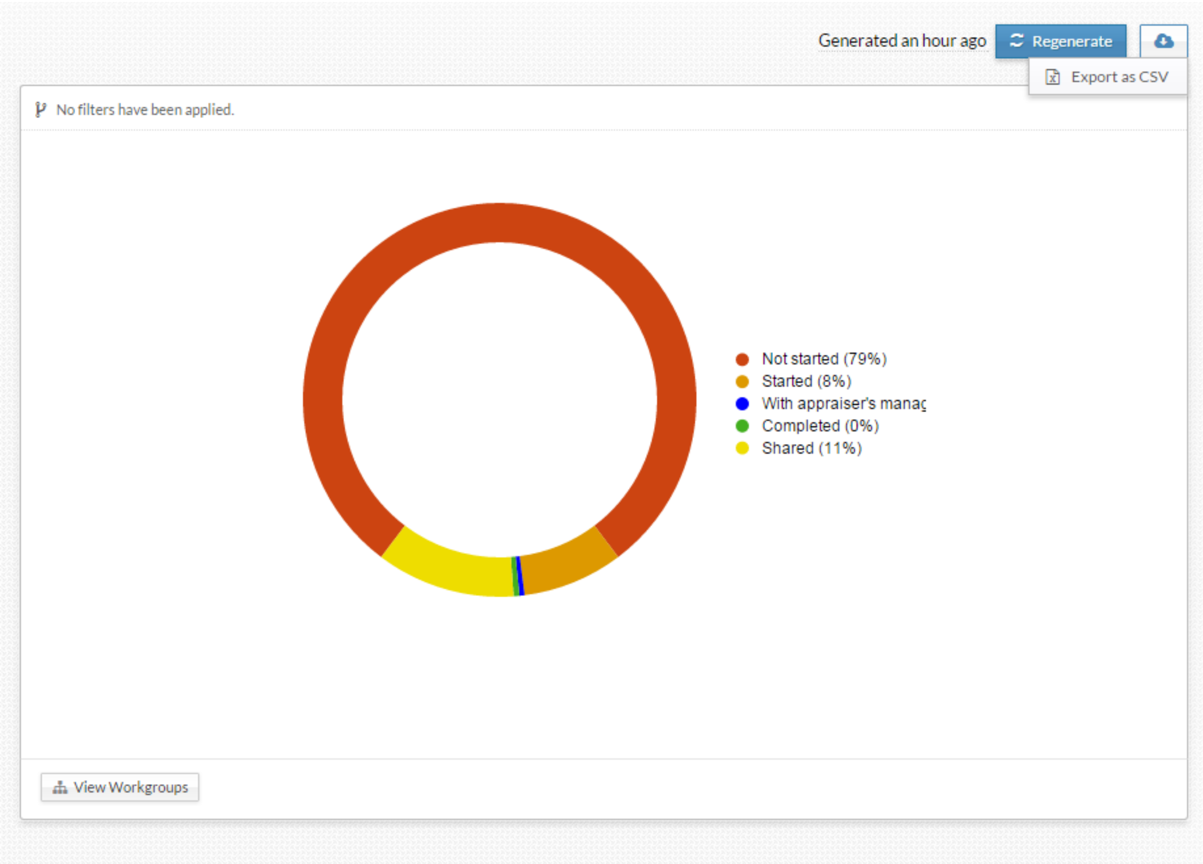
This report gives a visual representation of the stage that the users' review forms are in at that present time, giving the reviewer/university/faculty/organisation an instant overview of performance and engagement. The dashboard includes the ability to drill down into further information about the individual and about their review form.

Reviewers and Workflow commenters / Senior Managers will have access to these reports to oversee the progress of their reviewees' review forms.



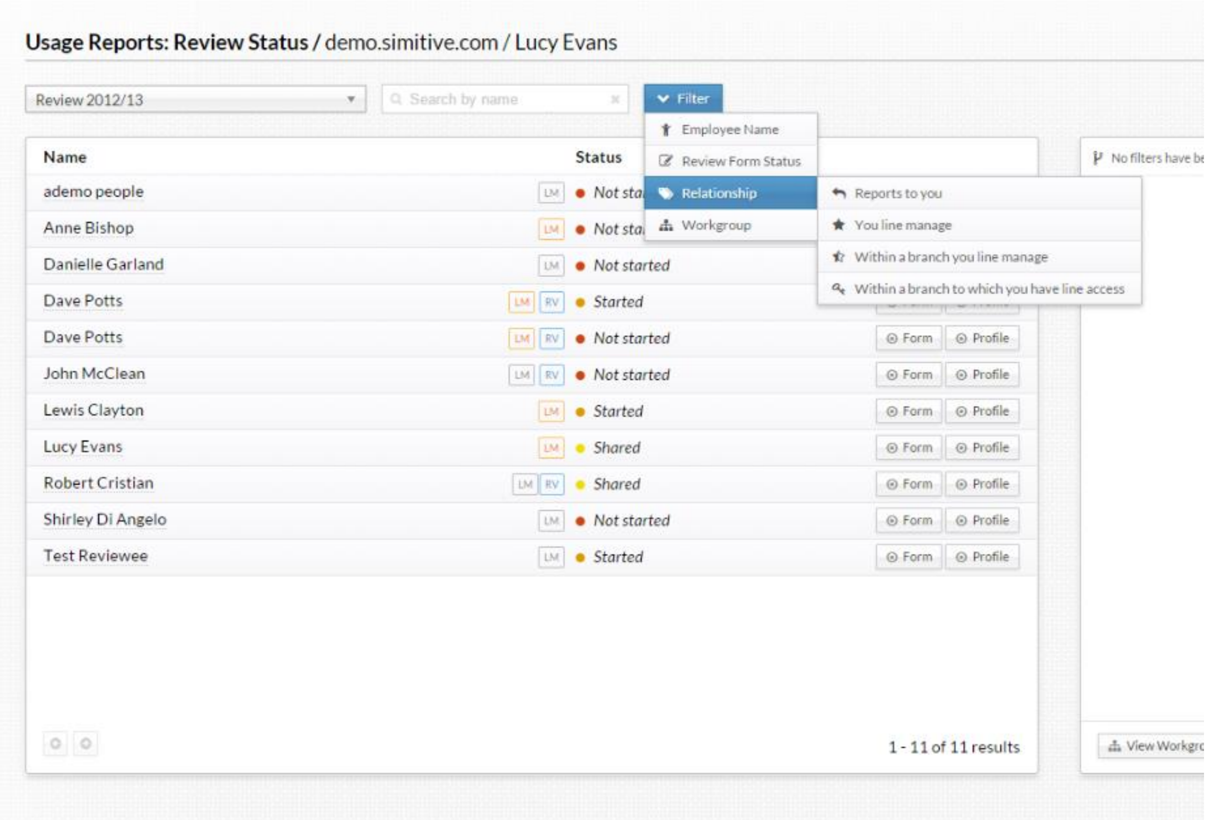
Usage report features and useful tips

- It is recommended to click on the 'Regenerate' button before use to ensure that the most recent data has been shown by the report in relation to users' forms.
- Ability to export results to a CSV format file.

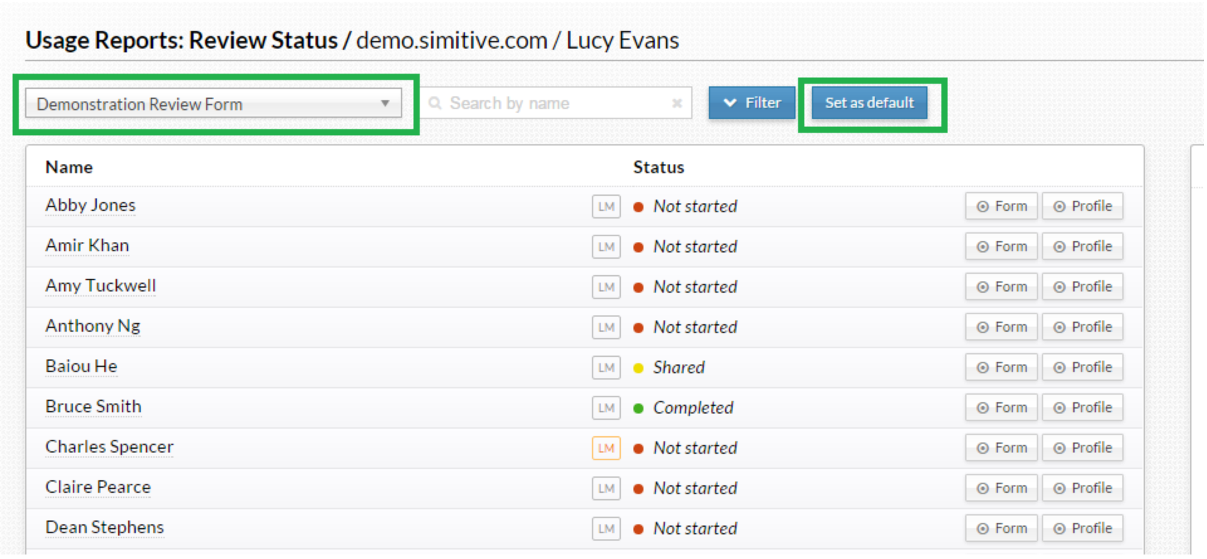


❖ Ability to filter through the Usage reports by

- Employee Name
- Review Form Status
- Relationship
- Workgroup



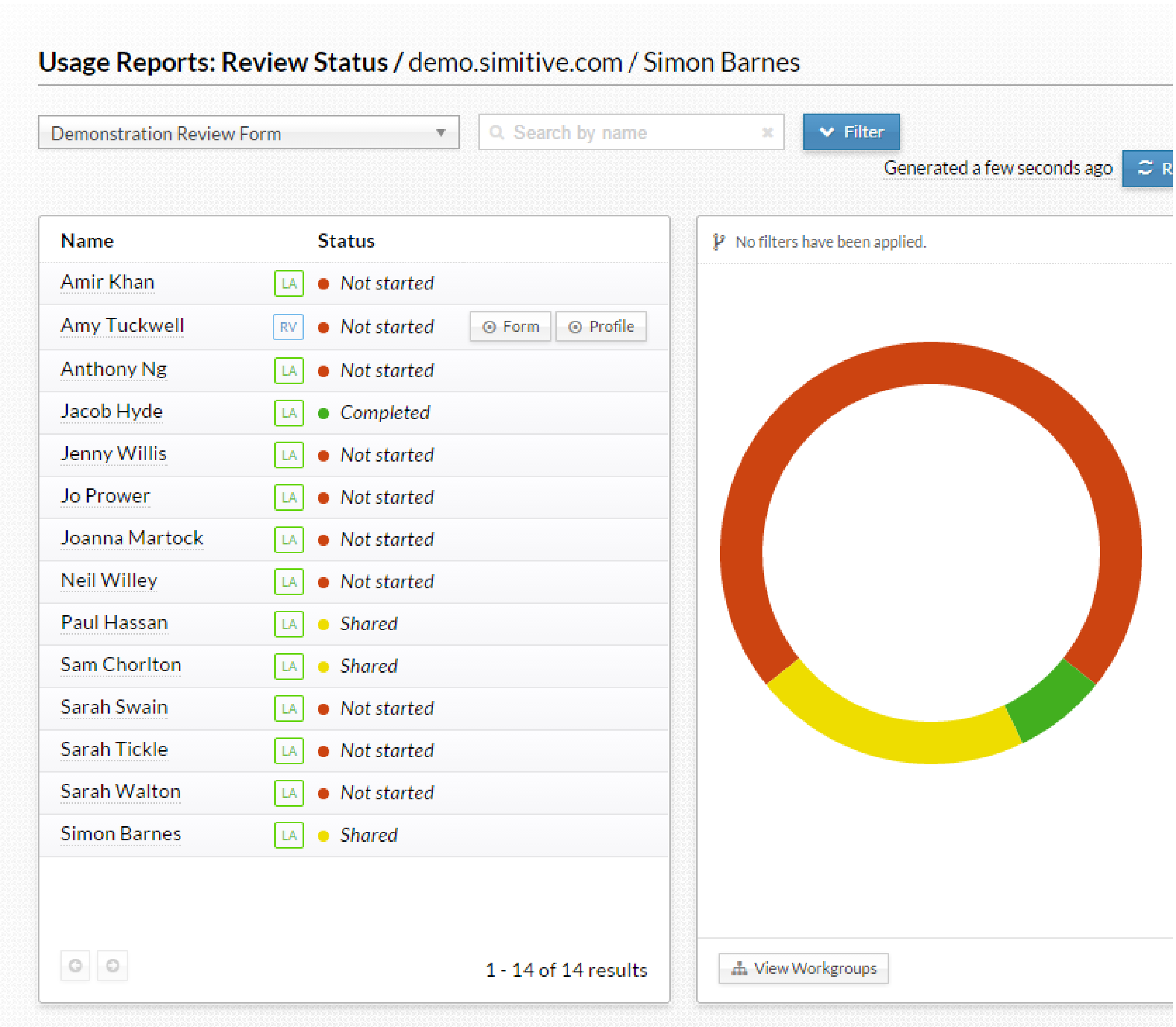
❖ Ability to set a review form showing as default upon running the usage report



❖ Ability to access user's forms and profiles from the usage reports

Reviewers or users with **Line Manager** or **Line manager Access** permissions for certain departments, who are able to view users' profiles and review forms, will have a link to access these from the usage reports. Users who do not have these permissions will only be able to view the progress of a user's review form.

For example, in the image below, Simon is the **reviewer** for Amy Tuckwell so he has access to click to view her review form, as well as her profile. For Amir Khan however, he only has permissions to view the progress of his review form. On this particular site users with **Line Manager Access** have only been given permissions to view the progress of review forms.



In the example shown below, Lucy has been given **Line Manager** permissions which on this particular demo site have been set to allow users with these permissions to view the user's review form and Me page.

Usage Reports: Review Status / demo.simitive.com / Lucy Evans

Review 2012/13 | Search by name | Filter

Name		Status		
ademo people	LM	Not started	Form	Profile
Anne Bishop	LM	Not started	Form	Profile
Danielle Garland	LM	Not started	Form	Profile
Dave Potts	LM RV	Started	Form	Profile
Dave Potts	LM RV	Not started	Form	Profile
John McClean	LM RV	Not started	Form	Profile
Lewis Clayton	LM	Started	Form	Profile
Lucy Evans	LM	Shared	Form	Profile
Robert Cristian	LM RV	Shared	Form	Profile
Shirley Di Angelo	LM	Not started	Form	Profile
Test Reviewee	LM	Started	Form	Profile

1 - 11 of 11 results

Privacy FAQs

Q: Who can see my review form data?

A: Only you and your reviewer(s), once you have shared the form, can see your review data. If you have people in your workflow, they will see the finalised review form, but will only have the ability to comment and will not be able to make any changes to the review. In addition, authorised Administrator users in your organisation will be able to access this data, as well as a Simitive administrator, for administrative purposes only.

Q: Who can see my history in the review form?

A: Only you will be able to see your history in the review form. If you have shared access text areas (text areas that can be edited by both reviewee and reviewer) the history can be seen by both reviewee and reviewer. As above, authorised Administrator users will be able to access this data, as well as a Simitive administrator.

Q: Who can see my personal data, like email address, password, etc.?

A: Your personal data is visible to authorised Administrator users and a Simitive administrator. Specifically, your email address is visible to authorised Administrator users, Data Managers and a Simitive Administrator.

Review Terminology

Access

You will be unable to access a review form if someone else is editing it.

Add

Clicking Add at the end of questions, allows you to add new lines or text areas to tables.

History

History of text areas can be viewed by clicking on **view history** in a text box.

Finalise

Clicking Finalise on a review will end the review process until the next review cycle. Once agreed by both reviewer and reviewee, no changes can be made to the finalised review form. Once finalised, a review's finalisation date will be displayed in the review header (above the review form) and in the review form table on the Me page.

Meeting Date

The meeting date allows you to set and agree a date for your review meeting with your reviewer or reviewee.

Multiple Reviewers

Review forms allow for multiple reviewers. Any additional reviewers will receive the same actions as the initial reviewer. They can also access the form and add content. All reviewers and the reviewee will need to agree to finalise a review.

*****Note: Multiple reviewers can only be added by Reviewers or Administrators.

Notes

The notepad allows you to:

- Create private notes only accessible by you
- Create notes to share with your reviewer
- Comment on individual shared notes
- Add attachments to notes
- Change private notes to shared notes
- Filter notes by date and author
- Print notes

Save and Close

Clicking Save and Close will save any changes to your review without sharing them with your reviewer(s) or reviewee. This will return you to your Me page.

Share and Close

Clicking Share and Close on a review form, will share all current changes made to the review with the reviewee or reviewer(s).

*Note: If you make changes to a review after it has been shared, these will not share with the reviewee/reviewer until you click share again.

Shared Fields

Shared fields allow both reviewees and reviewers to input text in the same text box and edit all text.

Workflow

Both reviewers and reviewees can invite workflow commenters to a review, which allows users who are not the reviewee or reviewer to comment on a review.

A workflow commenter:

- will be asked to add a comment on a review after it has been finalised
- will be able to add a general comment to the whole review

*Note: Users in a workflow will not be able to view or comment on a review form until it is finalised. After leaving a comment, users are able to go back and view the review form again.