

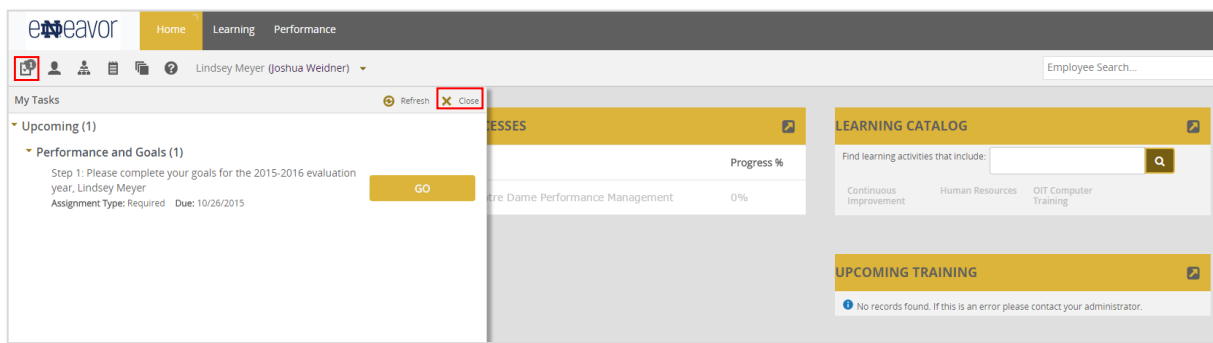


## Logging in for the First Time

When you first log into the new Endeavor system and arrive at the home dashboard, **My Tasks** will be automatically expanded as shown below. **My Tasks** conveniently displays:

- your upcoming training
- your performance review (when your review is at a step that you own)

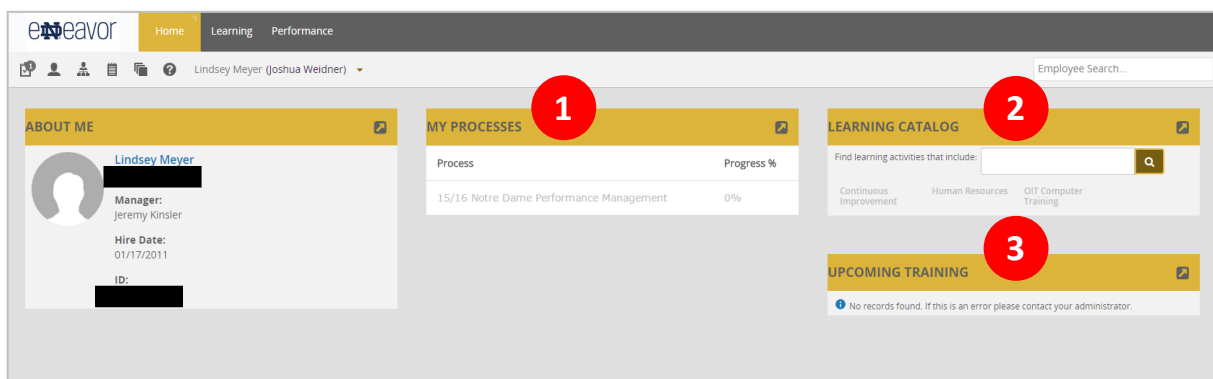
To close **My Tasks**, click the  icon at top right. To expand **My Tasks** once again, click the  icon at top left.



## Your Home Dashboard

After you log into Endeavor the first time, you will see the home dashboard.

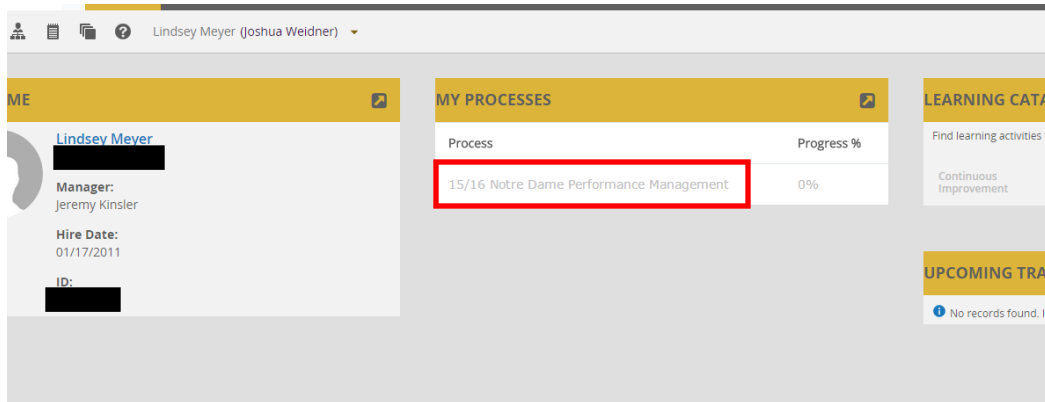
1. **My Processes** will list your current performance review.
2. **Upcoming Training** will display upcoming training you have registered for.
3. **Learning Catalog** will allow you to search for available classes.



## Accessing your Performance Reviews

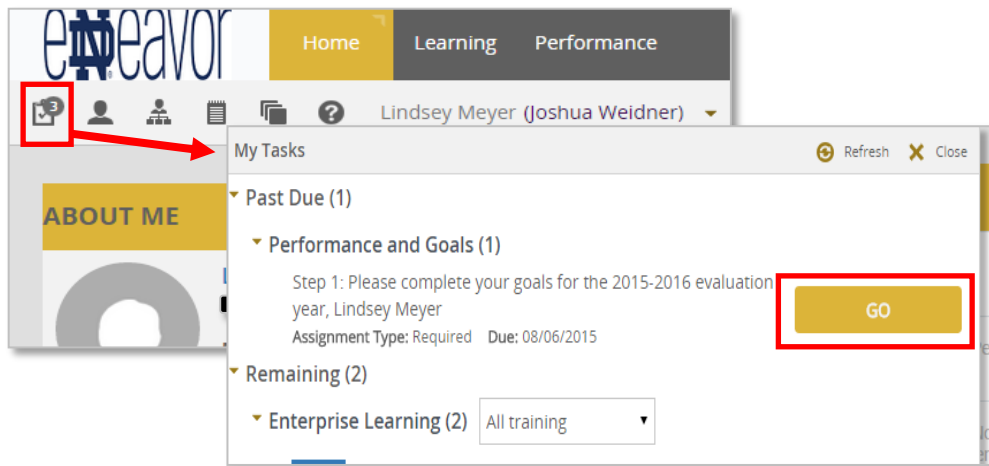
You can start a new year's review (or open an existing review) two ways:

1. On your home dashboard, **My Processes** will list your current review. Click it.
2. Or, under the **My Tasks** menu, **Performance and Goals** will also list steps awaiting your input. Click **Go**.



1

OR



2

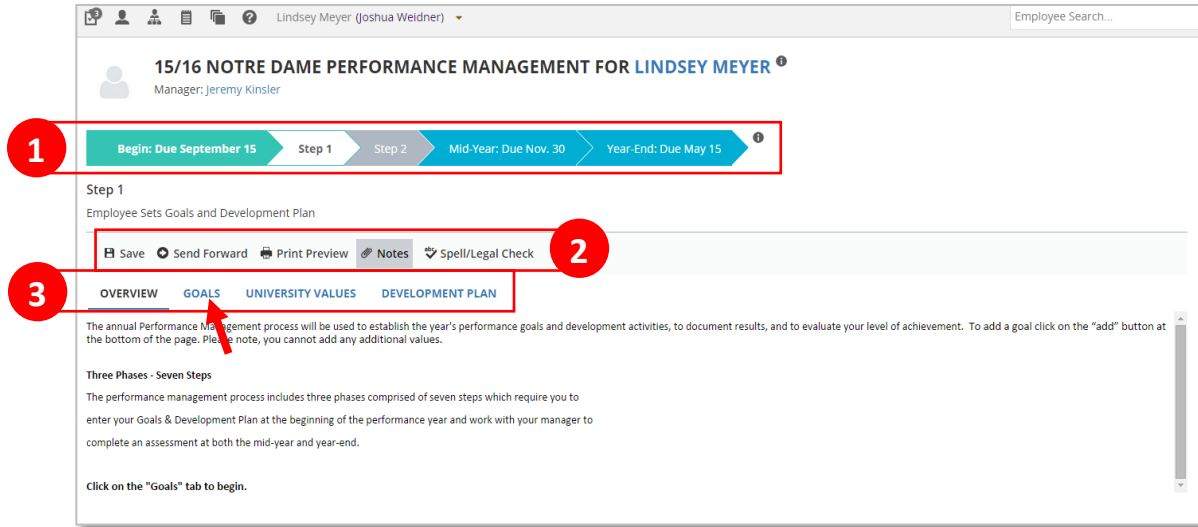
Once you access a performance review, you will arrive at the **Overview** page for that review.

## Performance Management Overview Page

Let's look at three areas of the **Overview** page (refer to the diagram below):

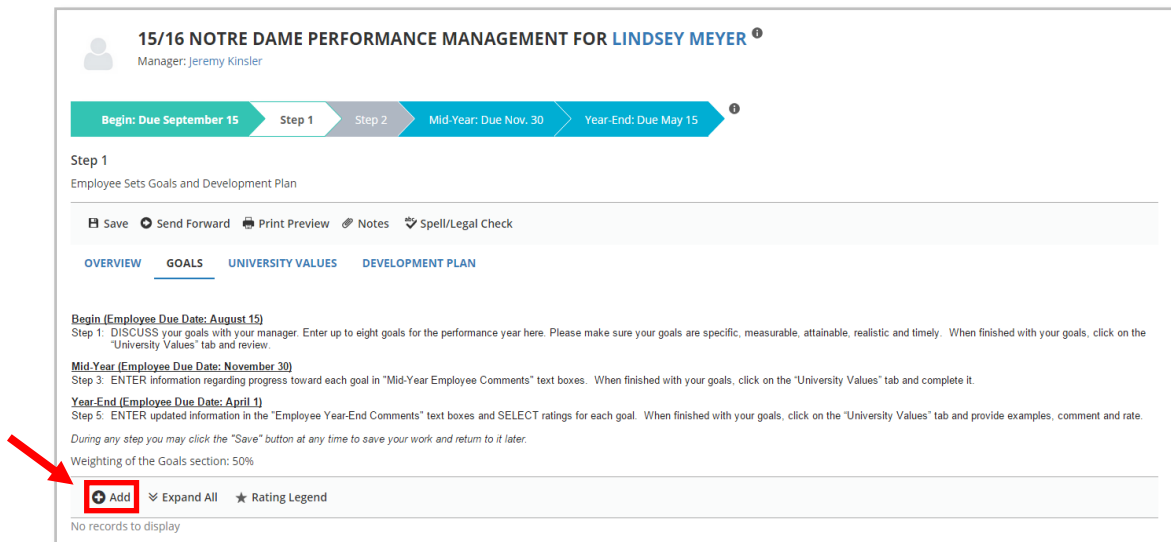
1. The performance review timeline shows you the due dates for each step in the review process.
2. The menu below the timeline allows you to **Save** your review, **Send it Forward** to your manager, **Print** it, enter **Notes** for later reference, or check your **Spelling**.
3. The "tabs" menu is where you will navigate to the different areas of your performance review. There is a tab for **Goals**, **University Values**, and **Development Plan**.

To begin your review, click the **Goals** tab.



## Entering Goals

After you click the **Goals** tab, you will see an option at the bottom to **Add** a goal. Click it.




## Entering Goals (continued)



When you click **Add**, the fields to enter a goal will appear. There are two required fields:

1. The name of your goal goes in the **Goal** field. You may use any brief description that identifies the goal.
2. Provide details about your goal in the **Description** field. Don't forget the general rule: most goals should follow S.M.A.R.T. criteria. That is, they should be Specific, Measurable, Actionable, Realistic, and Time-bound (with a deadline). For help deciding what your goals should be, see your manager. Also see the Performance Management page on the HR website for more information about setting SMART goals.

The screenshot shows a web form titled "Weighting of the Goals section: 50%". At the top, there are buttons for "+ Add", "Expand All", and "Rating Legend". Below that, there are buttons for "Delete" and "S.M.A.R.T Wizard". The main form area contains several fields: "Goal \*" (a text input field with a red circle '1' next to it), "Description \*" (a rich text editor with a red circle '2' next to it), "Start Date" (a date picker), and "Due Date" (a date picker). At the bottom, there is a "Percent Complete" dropdown menu with "- Select -" selected.

Other fields you may fill out include: **Start Date**, **Due Date** and **Percent Complete**.

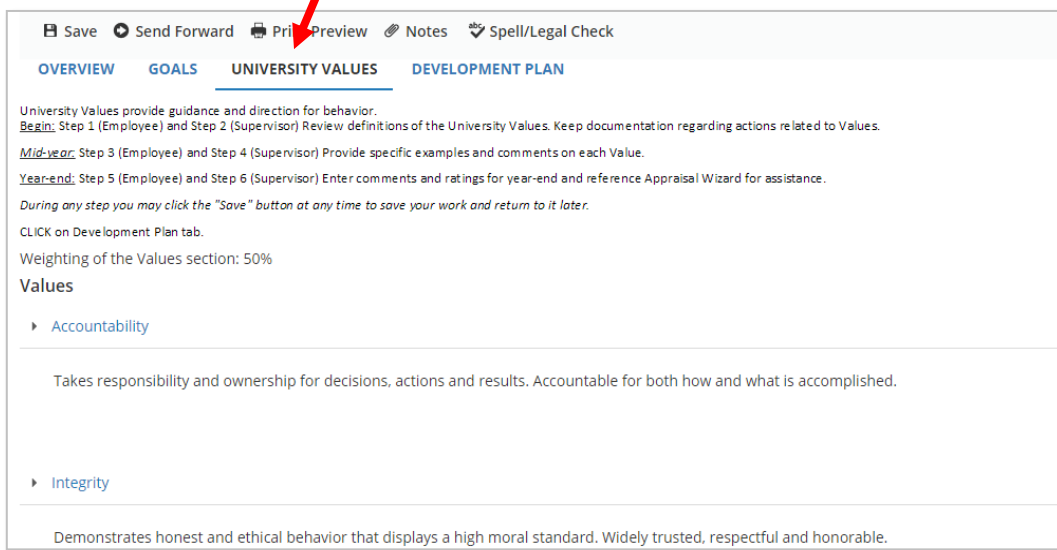
**Save Your Work.** To save your work in the system, click the  button. Note: your input is only saved when you click the save button, or when you submit your review at the end!

**Adding Goals.** When you finish filling out the required fields, click the  button again to add your next goal. Once you've added all your goals, move onto the next section by clicking the  tab.

## University Values

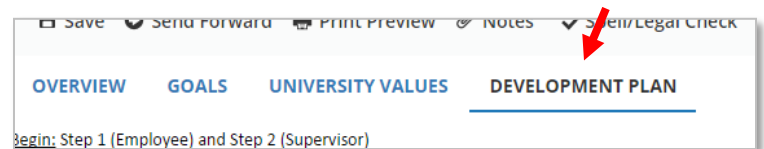
When you click the **University Values** tab, you'll see a description of each University value.

During the beginning of each performance management cycle (steps one and two), you will be prompted only to review the values. Later, during Step 3 (mid-year reviews) and Step 5 (year-end reviews), comment fields will be available for you to enter examples of how the values have been demonstrated.



## Development Plan

Finally, click the **Development Plan** tab and click **Add** (at bottom) to add a development plan. The fields to enter a development activity will appear. Just like a goal, there are two required fields:

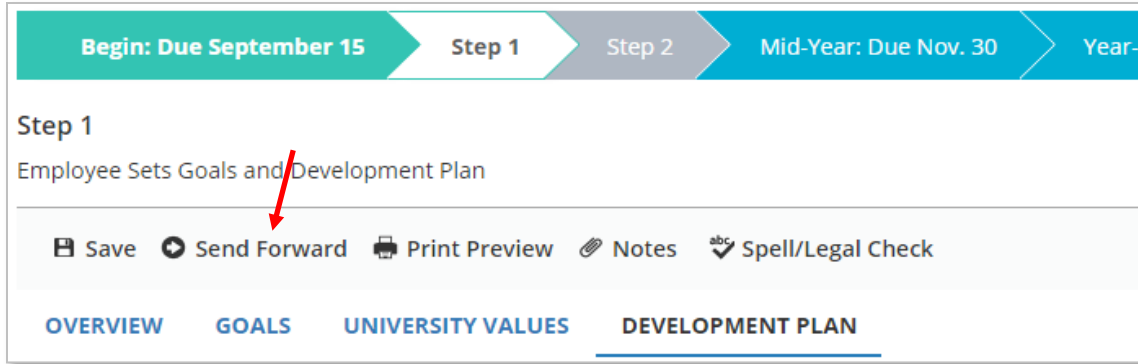


1. The name of your **Development Activity**. You may use any brief description that identifies the activity.
2. The **Measures or Outcomes**. Here you will identify the specific skills or knowledge you will demonstrate by completing the activity.

The screenshot shows the 'Development Plan' form. It includes a 'Send Forward' button (highlighted with a red circle and arrow) and an 'Add' button. The form has two main sections: 'Development Activity \*' (with a red circle '1' next to the input field) and 'Measures or Outcomes \*' (with a red circle '2' next to the input field). The 'Measures or Outcomes' field contains the text 'Tahoma' and has a rich text editor toolbar. There are also 'Start Date' and 'Due Date' fields with calendar icons.

## Send Forward

Once you have finished, click **Send Forward** to forward the review to your manager.



## That's it, for now!

Your manager may schedule a time to review your goals with you if that hasn't been done already.

In the meantime, remember to take notes on your accomplishments towards your goals so you can enter helpful comments during mid-year and year-end reviews.

*For assistance with the Performance Management process, refer to the Performance Management webpage on the HR website, see your manager, or contact askHR at 574-631-5900 or askHR@nd.edu.*