Online Performance Management
Setting Expectations

Instructions for Non-Exempt Staff
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Introduction
The eNDeavor performance management system is a nine-step process that reflects all the steps of Notre Dame’s performance management system, including setting expectations, behavioral competencies, mid-year reviews, examples of specific achievements, and the year-end performance review. This is an automated, electronic version of the paper form we introduced in 2008 and that, hopefully, you have used at least once. As you begin to learn the system you will notice that it is an electronic version of the paper format. As much as possible we have kept the same terminology and look that you are accustomed to.

The focus of this session will be on the first two steps of the process:
- Step 1: Employee Sets Expectations
- Step 2: Manager Reviews Expectations

Later this year, we will introduce you to the other seven steps of the performance management system.

This training is based on two assumptions: (1) you have already had some conversation with your manager about your expectations that you will be pursuing for the year as well as activities to include in your development plan and (2) you have already had some training regarding the performance management process.

Objectives
We’re going to take you through the first couple steps of this process as if you were first reviewing your expectations and adding additional expectations and a development plan. You will learn to:
- Log on to eNDeavor and access the performance management system
- Review/revise/add expectations; review behavioral competencies; enter development activities; and send forward to manager
- View your manager’s feedback comments; modify your expectations and development activities to get agreement from your manager; and send forward for approval

Email notification
You should receive email notification whenever there is a new task for you to complete. This should prompt you to log on to eNDeavor and view open tasks.

Sending forward/sending back
In this new online process, there is a concept of “sending forward” and “sending back” that is important to understand. Whenever you have completed a task, you will either Send Forward to the next step or Send Back to the previous step. As an employee, you will primarily use the Send Forward feature.
For example: When as an employee you set your expectations (Step 1), you send forward to Step 2 (Manager Review). When your manager has feedback comments for you, he/she sends back the comments to Step 1 (Employee Sets Expectations) so the expectations can be modified.

Log On to eNDeavor
When the performance management system is ready to accept employee input, you will receive an email notification inviting you to log on to the performance management system. If you have previously used the learning module of eNDeavor to enroll in classes, you may already be familiar with these logon procedures. The logon instructions are the same for either module.

1. Open your web browser and go to: endeavor.nd.edu
2. At the Welcome screen, enter your Notre Dame username and password.
3. Click Login. This takes you to the Home Dashboard screen.

The Home Dashboard
The Home Dashboard should always be your main destination when you want to work on specific performance management tasks, or if you get confused during your visit to the site. Using the tabs at the top, you can return to the Home Dashboard when necessary, verify your team members (managers only), run reports, and view an organizational chart. From the Navigation pane on the left you can access other features, such as Notebook.

The Home Dashboard also displays three personalized panels containing links and information important to your present and past performance management reviews.

My To Do List: This is where you will go to see if you have any tasks that need to be worked on or completed. This is the first place you should check after you log on.

My Performance Reviews (Completion Graph): This shows you how many of the nine steps remain to be completed in your performance management process. You may find this a useful reminder of where you are in the nine-step progression.

My Past Reviews: This will contain links to past completed reviews.
Review/Modify Expectations

Before you begin

1. When you first log in, always check My To Do List for items to be worked on. Since you have not reviewed the standard expectations for your position, you will see the open task: Step1: Please complete your expectations for the year <your name>. It will also indicate a status of Not Started and a task Due Date.

   ![My To Do List](image)

   - Action: Do
   - Task Name: Step 1: Please complete your expectations for the year
   - Status: Not Started
   - Task Due Date: 02/11/2009

2. Click on the blue highlighted word Do (Action column), at the left of the task name. This will take you to the workflow graphics screen showing the step of the process that you need to complete.

   ![Workflow Graphics](image)

   This page gives you an overview of the entire nine-step process. As you work through the process, the step that needs to be completed will be highlighted in blue. In this case, “Step 1: Employee Sets Expectations” is highlighted. (NOTE: This is not an active link, but merely an indicator of where you are in the process.)

   For each step of the process, you will need to complete the task required in each of the tabs at the top of the screen (see below). Notice that when the screen opens, the first tab (Overview) is active. You will move through the tabs from left to right.
3. Scroll down the page to the General Information area and check that your personal information is correct and the manager listed is the one you report to.

![General Information Table]

(NOTE: If this information is incorrect, it should not prohibit you from completing your task, but please inform your manager so it can be corrected.)

4. Scroll back up to the top of the screen. Note the tabs directly above the words “Workflow Graphics.” Overview is highlighted because that is the tab that is active.

![Workflow Graphics Tab]

5. Click on the **Expectations** tab to access the Expectations screen.

6. Review the text in the Information box at the top of the screen. This is a reminder of the University goals that you should keep in mind when working on your expectations.

**Modify an expectation**

1. Scroll down to the header **Expectations: Expectations 1 of 3.**
2. Review the description of the first expectation (Quantity of Work).
Setting Expectations (Non-Exempt Staff)

3. If you accept the standard definition as it appears, proceed to #4 below.

   If you wish to add to the standard definition to make it more specific to your job, click in the text box and type in the specific details. For instance, you could add: “My expectation is to increase the number of invoices processed each week by 10%.”

   ![Expectations: Expectations 1 of 3](image)

4. To enter the due date, click the blue box to the right of the arrow buttons. This accesses a calendar, enabling you to select the exact month and date.

   ![Calendar](image)

5. In the pop-up calendar, click on the appropriate due date for your expectation. (Hint: Use the back and forward buttons as necessary to scroll through the calendar.) The date you select is automatically entered in the Due Date field.

   ![Due Date: 04/06/2009](image)

Enter additional expectation

1. To add an additional expectation, scroll to the top of the window and click once on the Add Expectations button.

   ![Expectations: Expectations 1 of 3](image)

   It may appear that nothing has happened, but look under the Information box and you will notice the indicator now shows: “Expectations: Expectations 1 of 4.”

2. Press Page Down on your keyboard to add a fourth expectation (Expectation 4 of 4).
3. Enter your additional expectation in the text field, as well as the due date.

![Expectations: Expectations 4 of 4](image)

4. Add other expectations in the same manner.

**Remove an additional expectation**

If you have added an expectation but decide you no longer want it, you can easily remove it.

1. Click the **Expectations** tab, if necessary.
2. Scroll down to the expectation you wish to remove.
3. Click the **Remove Expectations** button in the upper left hand corner of the expectation’s box you wish to remove.

![Expectations: Expectations 4 of 4](image)

A prompt box will appear asking you to confirm the deletion.
4. Click **OK**.

**Review Competencies**

1. Click on the **Behavioral Competencies** tab to access the Behavior Competencies screen.

![Behavioral Competencies](image)

2. Read the suggestion in the Information box at the top of the screen. This is a reminder that you should discuss with your supervisor the specific behaviors that are expected for each competency.

3. Scroll down the page and read the general description for each of the five competencies. **NOTE:** Keep the competencies in mind throughout the year and make notes or keep examples of incidents that demonstrate these behaviors. See the “Notebook” section at the end of this document for an explanation of how to enter notes regarding your competency examples.
Enter Development Plan

1. Next click the Development Plan tab.

2. The Information box explains the purpose of identifying development activities that will aid in the enhancement of skills. You may add up to a total of five development activities.

3. Scroll down to the header Development Plan: 1 of 1.
   You are now ready to enter your first activity. Use the graphic of a completed activity below to see examples of each entry.

4. Click in the Development Activity box and enter your first development activity.

5. In the Target Date box, enter the date you will need to have the development activity accomplished (click the blue box to access a pop-up calendar for quick entry).

6. Use the Status dropdown to set the status of the development plan. As staff you will initially enter Not Started.

7. In the Metrics box, enter the specific measurements that will indicate achievement of the development activity.

8. In the Action Plan box, enter the steps you will take to accomplish the development activity.
Enter additional development activities

1. To add an additional development activity, scroll to the top of the window and click once on the Add Development Activities button (upper left).

   The Development Plan number indicator for your first plan now reads “Development Plan: 1 of 2” (instead of “1 of 1”).

2. Scroll down to Development Plan: 2 of 2 and add all the information for your second activity (see example graphic below).

Remove a development activity

If you have entered a development plan but decide you no longer want it, you can easily remove it.

1. Click the Development Plan tab, if necessary.
2. Scroll down to the development activity you wish to remove.
3. Click the Remove Development Activities button in the upper left corner of the development plan’s box you wish to remove.

   A prompt box will appear asking you to confirm the deletion.
4. Click OK.
Save a Draft

If you are unable to review/modify all of your expectations and add development activities in one session, you can save a draft.

1. Scroll up to the top of the screen.
2. From the Action buttons, click the Save Draft button (upper left).

A prompt box appears asking you to confirm the save.

3. Click Yes. Your draft is now saved. NOTE: Though there is no visible change in the screen, your draft expectations and development plan have been saved.

4. Click Dashboard on the Navigation pane at the left to view your To Do List. Notice that it has been updated with a new status of “Started.”

Complete a draft

1. If you have logged out of eNDeavor, go to endeavor.nd.edu and log in.
3. Click the Expectations tab to resume work on your expectations.
   - To edit an existing expectation: Scroll to the expectation you wish to change and revise the content of its text box (or make changes to the due date using the pop-up calendar).
   - To add another expectation: Click the Add Expectation button at the top of the window (upper left), then scroll down to the new expectation’s box and add the text and due date.
   - To remove an expectation: Scroll to the expectation you wish to remove and click its Remove Expectation button.
4. To resume work on your development activities, click the Development Plan tab.
   - To edit an existing development activity: Scroll to the activity you wish to change and revise the content of the text boxes (or make changes to the target date using the pop-up calendar).
   - To add more development activities: Click the Add Development Activities button at the top of the window (upper left), then scroll down to the new activity’s box and add the text and target date.
   - To remove a development activity: Scroll to the activity you wish to remove and click its Remove Development Activities button.
Send Completed Expectations and Development Plan to Your Manager

1. When you are satisfied that your expectations and development plan are complete, click the **Send Forward** button at the top of the window.

   A prompt box appears asking you to confirm that you want to send forward.

2. Click **Yes**. You will receive a system confirmation that the information has been submitted.

3. Click **Return to Home** to return to the Home Dashboard. Notice that your Step 1: (set expectations task) has been removed from My To Do List.

**NOTE:** If you want to view your expectations and development activities AFTER they have already been sent to your manager:

1. From the My Performance Reviews panel on your Home Dashboard, click the link to the Review Name you wish to view.

2. Click **View Form** at the top of the Performance Process Status list.
3. Scroll down to see your recently sent forward expectation(s) and development activities.

<table>
<thead>
<tr>
<th>Expectations: Expectations 1 of 3</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Expectations:</strong> Quantity of Work</td>
</tr>
<tr>
<td>Use of time is appropriate, plans and prioritizes work, sets and accomplishes goals, uses available resources wisely and completes assignments.</td>
</tr>
<tr>
<td>My expectation is to increase the number of invoices processed each week by 15%.</td>
</tr>
</tbody>
</table>

**System sign-out**
Always remember to sign out of the system when you are finished working.

1. Click **Sign Out** (upper right-hand corner of the screen).

2. At this point you can either click the **Red X** (upper right corner) to close the browser window, or click **Return to Login Page** to log back into the system.
Revise Expectation and Development Plan after Manager Review and Send Forward

If your manager has reviewed your expectation and development plan and has determined that some revision(s) need to be made, he/she will “send back” feedback comments to you. For the purposes of these instructions, we will assume feedback has been sent by your manager.

1. Go to **endeavor.nd.edu** and log in using your *username* and *password*. This takes you to the Home Dashboard screen.

2. Check My To Do List. You will again see the open task: “Step 1: Please complete your expectations for the year <your name>”.

3. Click on the blue highlighted word **Do** (Action column), at the left of the task name. This will take you to the Feedback/Comments screen.

4. Read your manager’s comments which appear directly below the Feedback Comments tab. In this instance your manager is asking you to change a percentage in Expectation 1 and add an additional expectation, as well as remove a development activity.

5. **To make changes to your expectations**, click the **Expectations** tab.
   a. To revise the expectation, scroll down and make the change. In this example you are changing the percentage in Expectation 1 from 10% to 15%.
b. To enter the additional expectation, scroll to the top of the screen and click the **Add Expectations** button.

Scroll down to **Expectations: Expectations 5 of 5** and enter the appropriate text and due date.

**NOTE:** The Remove Expectations buttons is also still active in this screen, should your manager’s feedback require you use it.

6. To make changes to your development activities, click the **Development Plan** tab and scroll to **Development Plan: 1 of 2**, the activity to be removed.

Click **Remove Development Activities** button.

Click **OK** to confirm the removal. Notice that the activity is removed and only one development plan remains.

7. When you are done revising your expectations and activities, click the **Send Forward** button at the top of the window.
8. A prompt box appears asking you to confirm that you want to send the expectations forward.

9. Click Yes. You will receive a system confirmation that the expectations have been submitted.

10. Click Return to Home to return to the Home Dashboard. Notice that your Step 1: (complete your expectations) has been removed from My To Do List.

11. If your work is currently complete in eNDeavor, click Sign Out in upper right corner of screen and click the Close button (red x) to close your browser window.

Use the Notebook Function
The Notebook tool can be used to keep personal notes regarding your performance management. For instance, you could enter examples of your Quantity, Quality and Job Knowledge achievements directly into your Notebook, or you can also copy information from a Word document and paste it into your Notebook.

1. To access the Notebook, click the Notebook icon in the Home Navigation pane (to the left of your Home Dashboard).

2. To create a new note, click the New button.

A new note screen opens. The date of entry is already populated with the current date. (This can be changed by clicking the blue box and using the pop-up calendar.)

3. Though you can use the Name field and perform a search to choose an employee name to associate with the note, this is a function that would normally be used by a manager.

4. To easily distinguish this note from other notes, enter a descriptive subject in the subject field.

5. Enter the text of your note in the Notes field.

6. To print the note, click the Print icon (upper left).
7. Click Save. You are returned to the Notebook screen and a list of your current notes.
8. For each saved note you have three choices available from the Action dropdown menu:
   - **View**: Access a note to read only (no active fields).
   - **Edit**: Access a note to make changes.
   - **Delete**: Remove a note.
   NOTE: You can also print from either the View or Edit mode.

**Use Org Chart**

You can use the Org Chart function to view the entire organization through a series of drill up selections.

1. Click the Org Chart tab above the Home Dashboard. This shows your position information.

2. Right-click on your position box and select **Drill Up**.

   ![Org Chart](image)

   This displays the next level of the org chart.

   ![Org Chart Level 2](image)

   You can continue drilling up in the org chart to see other levels within the organization.