Non-Exempt Staff Online Performance Management
Review and Modify Expectations—Quick Reference Guide

Log On to eNDeavor
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.

Check Your Task List and General Information
1. On the Home Dashboard, look at My To Do List for items to be worked on. If 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)

2. Click Do (Action column). In the Overview screen, the workflow graphic indicates you are on Step 1: Employee Sets Expectations of the nine-step performance management process.
3. Scroll to the General Information area and check that your personal and manager information is correct.
   NOTE: If incorrect, continue with your task, but inform your manager of any corrections to be made.

Review / Modify Expectations
1. Scroll to the top of the Overview screen and click the Expectations tab.
2. Review the text in the Information box at the top of the screen. This is a reminder of the University goals to keep in mind when working on your expectations.
3. Scroll down to the header Expectations: Expectations 1 of 3.
4. Review the description of each expectation.
5. If you accept the standard definition as it appears, proceed to #6 below.
   If you wish to change the definition of an expectation, click in the text box and type in your modification. For instance, you could add Quantity of Work expectation: “My expectation is to increase number of invoices processed each week by 10%.”
6. In the Due Date field, click the blue box ( ) to the right of arrow buttons.
7. From the calendar pop-up, select a due date (use the arrows and dropdowns as necessary to move through calendar).

Review Competencies
1. Click the Behavioral Competencies tab.
2. Read the text in the Information box at the top of the screen.

Add First Development Activity
1. Click the Development Plan tab.
2. Scroll to Development Plan: 1 of 1.
3. In the Activity field, enter the development activity.
4. In the Target Date field, click the blue box ( ) to the right of arrow buttons and select the date from the calendar.
5. From the Status dropdown, select Not Started.
6. In the Metrics and Action Plan fields, enter the measurements and steps for your activity.

Add an Additional Expectation or Development Activity
1. Click the Expectations tab (or Development Plan tab).
2. Scroll to the top of the window and click once on the Add Expectation button (or Add Development Activities button).
   NOTE: It may appear that nothing has happened, but look under the Information box—the indicator now shows: Expectations: Expectations 1 of 4 (Development Plan: 1 of 2).
3. Press Page Down on your keyboard to Expectation 4 of 4 (or Development Plan: 2 of 2). Enter your additional expectation or activity in the text field, as well as the due/target date.
   NOTE: If entering an activity, proceed to #4 below.
4. For Development Activity, select a Status of Not Started from the dropdown and then enter Metrics and Action plan in the two remaining text fields.
   Add other expectations/activities in the same manner.

Remove an Additional Expectations
1. Click the Expectations tab (or Development Plan tab).
2. Scroll down to the expectation/activity you wish to remove.
3. Click the Remove Expectation button (or Remove Development Activities button) in the upper left corner of the expectation’s or activity’s box you wish to remove.
4. Click OK to the prompt box, to confirm the deletion.

Send Expectations/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.
2. Click Yes in the prompt box to confirm that you want to send the expectations and activities forward.
3. In the System Confirmation box, click Return to Home.
4. Step 1: task is now removed from My To Do List.

View Manager Feedback and Modify Expectations/Activities
After you “send forward” your expectations, your manager will review them and probably “send back” to you suggestions for changes.
1. Log in to endeavor.nd.edu and access the Home Dashboard.
2. On the Home Dashboard, look at My To Do List. You will again see the open task: Step 1: Please complete your expectations for the year <your name>.
3. Click Do (Action column).
4. In the Feedback/Comments screen, read your manager’s comments.
5. At the top of the screen, click the Expectations tab (or Development Plan tab).
6. Scroll to the expectation/activity you need to modify and edit as necessary.
   NOTE: Use the Add and Remove buttons as necessary.
7. When your modifications are done, click Send Forward (top of screen).
8. Click Yes to confirm send forward.
9. Click Return to Home. The Step 1: task has again been removed from My To Do List.
10. If you are done working in eNDeavor, click Sign Out (upper right) and close your browser window.
Sign Out of eNDeavor
When you are done working in eNDeavor, it is always a good idea to sign out of the system.
1. Click Sign Out (upper right-hand corner of the screen).
2. Click the Close button (red X) to close the browser window.

Save a Draft of Your Expectations and Development Plan
If you are ever interrupted during your entry, you can save a draft to complete at a later time.
1. Scroll to the top of the Expectations screen and click Save Draft.
2. Click Yes to confirm save.
NOTE: Though it may appear that nothing has happened, your expectations and development plan draft is now saved.
3. Click Dashboard from the Home menu on the left. Your To Do List still lists your Step 1: task, but its status is now “started.”

Resume work on your draft
1. Open your web browser and go to endeavor.nd.edu
2. From My To Do List, click Do. Click the Expectations tab (or Development Plan tab).
3. To edit existing expectations/activities: Scroll to the expectation/activity and revise content of text box or due/target date.
4. To add another expectation/activity: Click Add Expectation button (or Add Development Activities) at top of screen, scroll down to the new expectation’s or activity’s box, and enter text and date.
5. To remove an expectation/activity: Scroll to the expectation or activity you wish to remove and click its Remove Expectation button (or Remove Development Activity button).
6. To complete expectations/activities and send to manager: Scroll to top of page and click Send Forward, then click Yes to confirm. Click Return to Home. Step 1 task is now removed from My To Do List.

View Expectations and Development Activities after Sending Forward
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. Above the Workflow Graphics screen you can see your manager’s most recent Feedback Comment(s).
4. Scroll down to see your recently sent forward expectation(s) and development activities.

Use the Notebook Tool
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. In most cases, leave the Name field blank. Though in the name field you can perform a search for a particular employee your note may reference, this is a function that would normally only 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 3 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.
5. Click the Org Chart tab above the Home Dashboard. This shows your position information.
6. Right-click on your position box and select Drill Up. This displays the next level of the org chart.