

# Halogen User Guide

## Human Resources

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# Table of Contents

<b>Logging in to Halogen .....</b>	<b>7</b>
Sign in Halogen .....	7
Starting a session .....	7
Close Halogen session .....	8
Ending a session .....	8
 <b>Introduction to Halogen .....</b>	 <b>11</b>
Introduction .....	11
Why Halogen? .....	11
User types .....	11
List of HR Administrators .....	11
 <b>The Halogen interface .....</b>	 <b>15</b>
Navigation in Halogen .....	15
Changing the interface language .....	17
Tasks .....	18
Icons in Halogen Forms .....	19
The form navigator pane .....	20
 <b>Main functions .....</b>	 <b>23</b>
Tasks to complete .....	23
Feed .....	25
My Performance .....	27
<i>My Performance.</i> .....	27
<i>Adding a goal.</i> .....	28
<i>Adding a development plan.</i> .....	31
<i>Adding a journal note.</i> .....	34
<i>Evaluations.</i> .....	36
<i>Print a completed form.</i> .....	38
<i>Adding a document.</i> .....	40
<i>Deleting a document</i> .....	43
My employees .....	45
Task status .....	46
 <b>Goal setting.....</b>	 <b>51</b>
Setting goals .....	51
Meeting to discuss goals .....	52
Adding a goal .....	53

Linking behaviours to key competencies.....	55
Adding a development plan.....	55
Saving the draft version.....	57
Submitting a form for approval.....	58
Reviewing and approving goals.....	59
Employee final approval.....	61
<b>Self-appraisal Process.....</b>	<b>63</b>
Annual Appraisal Process.....	63
Steps for the self-appraisal process.....	67
Revision of the self-appraisal by the supervisor.....	71
Steps to review of the self-appraisal form by the supervisor.....	76
Second level supervisor's approval.....	79
Supervisor's sign off.....	80
Employee Evaluation Sign Off.....	82
<b>Performance Improvement Plan (P.I.P.).....</b>	<b>83</b>
Performance Improvement Plan(P.I.P).....	83
Steps of the P. I. P.....	84
<b>Probation.....</b>	<b>89</b>
Beginning of Probation Period.....	89
Goal Setting Form.....	89
Goal Setting.....	90
Approval of probation goals.....	95
End of probation period.....	97
End of probation form.....	98
Signature of the End of Probation Evaluation Form.....	108
Second Level Supervisor Approval.....	111
<b>Halogen Reports.....</b>	<b>113</b>
About reports.....	113
Score.....	114
Score Report.....	118
Feedback Report.....	123
Generating a competency rating report.....	126
Generating a goals report.....	129
Generating a development plan report.....	133
Generating an employee development history report.....	136
Generating the Status Report.....	140
<b>The HR Administrator.....</b>	<b>145</b>
HR Administrator Role.....	145



Definitions .....	146
Options from the <i>Participant Center</i> .....	152
Role of the Participants .....	153
 <b>The Participant Center .....</b>	 <b>155</b>
Operations in the left menu of the Participant Center .....	155
Assigning a Role .....	156
<i>Opening the HR Admin Control Center</i> .....	156
<i>Opening the Participant Center</i> .....	157
<i>Role Assignment</i> .....	158
<i>Returning to the user interface</i> .....	159
Adding a participant .....	160
<i>Opening the HR Admin Control Center</i> .....	161
<i>Opening the Participant Center</i> .....	162
<i>Adding a participant</i> .....	162
<i>Returning to the user interface</i> .....	164
Finalization of a step .....	164
<i>Opening the HR Admin Control Center</i> .....	165
<i>Opening the Participant Center</i> .....	166
<i>Selection of the participant and finalization of a step</i> .....	166
<i>Returning to the user interface</i> .....	169
The Rollback .....	169
<i>Opening the HR Admin Control Center</i> .....	170
<i>Opening the Participant Center</i> .....	171
<i>Selection of the participant and roll-back</i> .....	172
<i>Returning to the user interface</i> .....	174
Changing the Supervisor .....	175
<i>Opening the HR Admin Control Center</i> .....	175
<i>Opening the Participant Center</i> .....	176
<i>Assigning a supervisor</i> .....	177
<i>Searching supervisor name</i> .....	177
<i>Returning to the user interface</i> .....	179
Assigning the Form .....	179
<i>Opening the HR Admin Control Center</i> .....	180
<i>Opening the Participant Center</i> .....	181
<i>Assigning a Form</i> .....	181
<i>Returning to the user interface</i> .....	183
The 2nd level supervisor .....	183
<i>Opening the HR Admin Control Center</i> .....	184
<i>Opening the Participant Center</i> .....	185
<i>Assigning or removing the 2nd Level Supervisor</i> .....	185
<i>Returning to the user interface</i> .....	189
 <b>The Notification Center .....</b>	 <b>191</b>
The Notification Centre .....	191

<i>Opening the HR Admin Control Center</i> .....	191
<i>Notification Center</i> .....	192
<b>The Report Center</b> .....	<b>195</b>
The Report Center .....	195
<i>The Detailed Status</i> .....	196
<i>The Group Scores report</i> .....	201
<i>The Competency Rating</i> .....	206
<i>The On Time report</i> .....	210
<i>The Development Plan Report</i> .....	213
<i>The Goals report</i> .....	217
<i>Export Response report</i> .....	220
<i>Excel and reports created as text (.txt) files</i> .....	223
<b>User Activation / Deactivation</b> .....	<b>229</b>
User Activation and Deactivation .....	229
<i>Opening the HR Admin Control Center</i> .....	229
<i>User Deactivation / User Activation</i> .....	230
User Creation .....	232
<i>Opening the HR Admin Control Center</i> .....	232
<i>Personal Information Entry</i> .....	233
<i>Job Information Entry</i> .....	234
<i>Supervisor Assignment or Modification</i> .....	234
<i>Assignment or Modification of the HR Administrator</i> .....	238
<i>Group Assignment</i> .....	243
<i>User Center Parameters Saving</i> .....	245

# Logging in to Halogen

## Sign in Halogen

### Starting a session

Session length is limited to two hours. Once you are logged in, you can remain logged in for two consecutive hours. After two hours, you are automatically logged out.

1. Enter your user Outlook name.

A screenshot of the uOttawa login page. At the top left is the uOttawa logo, which consists of a stylized building icon and the text "uOttawa". Below the logo is a yellow rectangular box containing text about language settings. Underneath that is a red line of text about a look change. The main login area contains two input fields: the first is for the username, with the placeholder text "username@uOttawa.ca", and the second is for the password, with the placeholder text "Password". To the right of the password field is a link that says "Forgot your password?". At the bottom left of the login area is a red button with the text "Login".

 uOttawa

This page displays in the default language of your browser and device. To see this page in another language, [change your language settings](#).

Our look changed on July 16. [Read more](#).

[Forgot your password?](#)

2. Enter your Outlook password.

3. Click *Login*.

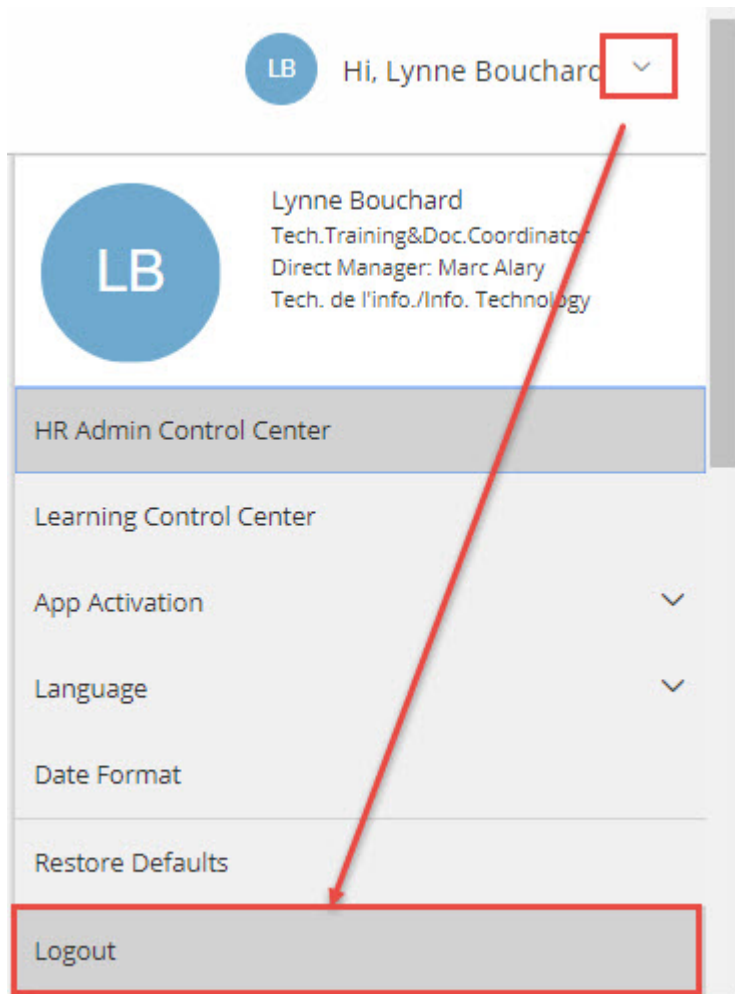
## Close Halogen session

### Ending a session

Halogen contains confidential data. As a security measure, you should sign out of Halogen session correctly by clicking *Logout* in the upper right corner of the screen.

1. Click on your Name in the upper right section of the page

2. Click on Logout.



Immediately after logging out, you will be taken back to the login page.



# Introduction to Halogen

## Introduction

This guide is designed to help you learn how to use Halogen and to act as a reference manual.

## Why Halogen?

Halogen is a Web-based application for managing performance through the use of electronic forms and automated processes.

With Halogen, users can:

1. Set annual goals, indicate probationary periods, schedule mid-cycle meetings and complete annual performance evaluations for contract and regular staff through the use of forms.
2. Access the appropriate forms, based on their user type.
3. Automatically manage tasks to be completed, based on their user type.
4. Schedule automated email reminders to staff about completing tasks in Halogen.
5. Produce reports in real time.

## User types

User types are tied to the position a staff member holds.

1. Employee: A staff member responsible for completing the goal-setting forms and the semi-annual and annual evaluation forms.
2. Supervisor: A staff member with direct-report employees.
3. Administrator: A Human Resources employee responsible for managing Halogen.

## List of HR Administrators

The HR Administrators of each faculty and service make sure that all steps of the Performance Management and Development Program process meet the deadlines.

They are as well the key contacts for their faculty or service employees wishing to make changes into Halogen.

Organization	Faculty or Service	Nom	Courriel
11	Telfer School of Management	Marc Albert	<a href="mailto:malbert@uottawa.ca">malbert@uottawa.ca</a>
12	Faculty of Arts	Louise Boisvert	<a href="mailto:lboisver@uottawa.ca">lboisver@uottawa.ca</a>
14	Faculty of Education	Martine Clément	<a href="mailto:mclement@uOttawa.ca">mclement@uOttawa.ca</a>
15	Faculty of Medicine	Pascale Donovan	<a href="mailto:Pascale.Donovan@uottawa.ca">Pascale.Donovan@uottawa.ca</a>
16	Faculty of Health Sciences	Loissa Georges	<a href="mailto:lgeorges@uottawa.ca">lgeorges@uottawa.ca</a> <sup>1</sup>
17	Faculty of Sciences	Carol Riordan	<a href="mailto:carol@uottawa.ca">carol@uottawa.ca</a>
18	Faculty of Engineering	Diane Comtois	<a href="mailto:Dcomtois@uottawa.ca">Dcomtois@uottawa.ca</a>
19	Faculty of Social Sciences	Sylvie Desrochers	<a href="mailto:sdesroch@uottawa.ca">sdesroch@uottawa.ca</a>
20	Faculty of Graduate and Postdoctoral Studies	Nathalie Chiasson	<a href="mailto:nchiass2@uOttawa.ca">nchiass2@uOttawa.ca</a>
21	Faculty of Law - Civil Law	Pierre Thibault	<a href="mailto:pierre.thibault@uOttawa.ca">pierre.thibault@uOttawa.ca</a>
22	Faculty of Law - Common Law	Chantal Sabourin	<a href="mailto:csabour3@uottawa.ca">csabour3@uottawa.ca</a>
23	Library	Mylène Lepage	<a href="mailto:Mylene.Lepage@uottawa.ca">Mylene.Lepage@uottawa.ca</a>
24	International Office	Alain Lagacé	<a href="mailto:alagace@uottawa.ca">alagace@uottawa.ca</a>
25	Center for Continuing Education	Edgar Mendoza	<a href="mailto:emendoza@uottawa.ca">emendoza@uottawa.ca</a>
26	Human Rights Center	Viviana Fernandez	<a href="mailto:vfernand@uottawa.ca">vfernand@uottawa.ca</a>
28	Research Management Services	Enjolie Provost	<a href="mailto:eprovoat@uottawa.ca">eprovoat@uottawa.ca</a>
29	Co-operative Education Programs and Career Development Centre	Manon Racine	<a href="mailto:Manon.Racine@uOttawa.ca">Manon.Racine@uOttawa.ca</a>
30	Office of the Registrar	Lynn-Marie McCarthy	<a href="mailto:lmccarth@uOttawa.ca">lmccarth@uOttawa.ca</a>

1. [mailto; lgeorges@uottawa.ca](mailto:lgeorges@uottawa.ca)



Organization	Faculty or Service	Nom	Courriel
31	Financial Aid and Awards	Lynn-Marie McCarthy	<a href="mailto:lmccarth@uOttawa.ca">lmccarth@uOttawa.ca</a>
32	Human Resources	Karen Maw	<a href="mailto:adminrhfrf@uottawa.ca">adminrhfrf@uottawa.ca</a>
34	Financial Planning	Marie-Pier Robert-Pagette	<a href="mailto:adminrhfrf@uottawa.ca">adminrhfrf@uottawa.ca</a>
35	Financial Resources	Marie-Pier Robert-Pagette	<a href="mailto:adminrhfrf@uottawa.ca">adminrhfrf@uottawa.ca</a>
36	Procurement	Marie-Pier Robert-Pagette	<a href="mailto:adminrhfrf@uottawa.ca">adminrhfrf@uottawa.ca</a>
37	Information Technologies	Anne Bercier	<a href="mailto:abedard@uottawa.ca">abedard@uottawa.ca</a>
38	Teasury and Pension Fund	Nathalie Chiasson	<a href="mailto:nchiass2@uOttawa.ca">nchiass2@uOttawa.ca</a>
39	VRA Financial Resources	Marie-Pier Robert-Pagette	<a href="mailto:adminrhfrf@uottawa.ca">adminrhfrf@uottawa.ca</a>
40	Physical Resources		
41	Protection Services	Colleen Bennett	<a href="mailto:Cbennet3@uOttawa.ca">Cbennet3@uOttawa.ca</a>
42	TLSS	Denis Bouchard	<a href="mailto:dbouchar@uottawa.ca">dbouchar@uottawa.ca</a>
43	Office of Risk Management	Martin Giguere	<a href="mailto:mgiguer2@uottawa.ca">mgiguer2@uottawa.ca</a>
44	Food Services	Mélanie Morisset	<a href="mailto:mmorisse@uottawa.ca">mmorisse@uottawa.ca</a>
45	External Relations	Marie-Claude Langlois	<a href="mailto:mlanglo@uottawa.ca">mlanglo@uottawa.ca</a>
46	CGCE	Nathalie Chiasson	<a href="mailto:nchiass2@uOttawa.ca">nchiass2@uOttawa.ca</a>
51	Community Life Service	Mélanie Morisset	<a href="mailto:mmorisse@uOttawa.ca">mmorisse@uOttawa.ca</a>
52	VRA Student Services	Nathalie Chiasson	<a href="mailto:nchiass2@uOttawa.ca">nchiass2@uOttawa.ca</a>
53	Housing	Julie O'Bonsawin	<a href="mailto:jobonsaw@uottawa.ca">jobonsaw@uottawa.ca</a>
54	Conventions and Reservations	Mélanie Morisset	<a href="mailto:mmorisse@uottawa.ca">mmorisse@uottawa.ca</a>
55	SASS	Francine D'Amour	<a href="mailto:fdamour@uOttawa.ca">fdamour@uOttawa.ca</a>
56	Sports Services	Lucie Laroche	<a href="mailto:llaroche@uOttawa.ca">llaroche@uOttawa.ca</a>
61	University of Ottawa Press	Nathalie Chiasson	<a href="mailto:nchiass2@uOttawa.ca">nchiass2@uOttawa.ca</a>
62	Animal Care and Veterinary Service	Michelle Tyssen	<a href="mailto:mtysen@uOttawa.ca">mtysen@uOttawa.ca</a>

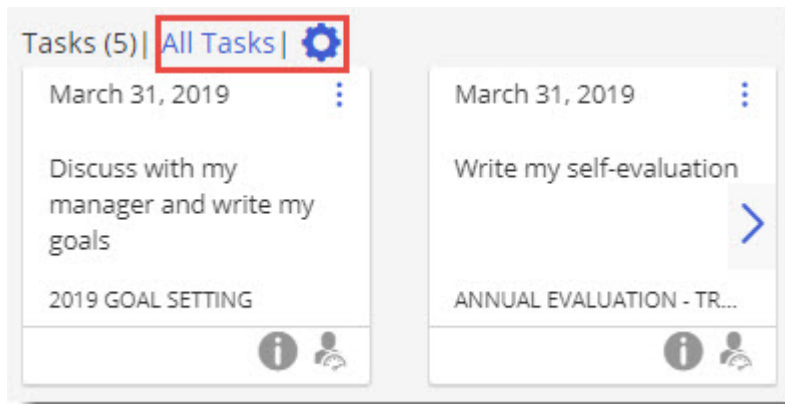
Organization	Faculty or Service	Nom	Courriel
70	Office of the Presidents and Vice-Presidents	Nathalie Chiasson	<a href="mailto:nchiass2@uOttawa.ca">nchiass2@uOttawa.ca</a>
71	Office of VP Acad and Provost	Nathalie Chiasson	<a href="mailto:nchiass2@uOttawa.ca">nchiass2@uOttawa.ca</a>
72	Office of VP Research	Nathalie Chiasson	<a href="mailto:nchiass2@uOttawa.ca">nchiass2@uOttawa.ca</a>
73	Office of VP Resources	Nathalie Chiasson	<a href="mailto:nchiass2@uOttawa.ca">nchiass2@uOttawa.ca</a>
74	Office of VP Ext Relations	Nathalie Chiasson	<a href="mailto:nchiass2@uOttawa.ca">nchiass2@uOttawa.ca</a>
75	Office of VP Gouvernance	Nathalie Chiasson	<a href="mailto:nchiass2@uOttawa.ca">nchiass2@uOttawa.ca</a>
84	Strategic Enrollment Management	Lynn-Marie McCarthy	<a href="mailto:lmccarth@uOttawa.ca">lmccarth@uOttawa.ca</a>

# The Halogen interface

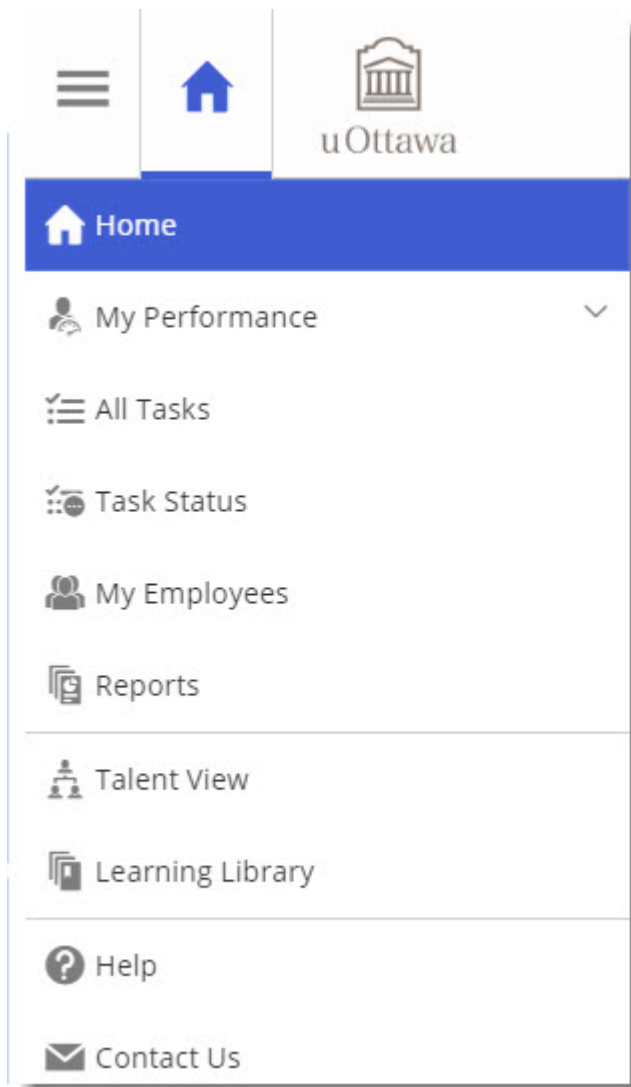
## Navigation in Halogen

Here are a few helpful hints for finding your way around in Halogen.

1. Text in blue indicates a link, which opens in another window.



2. The icon represented by three horizontal bars provides access to Halogen's main menu.



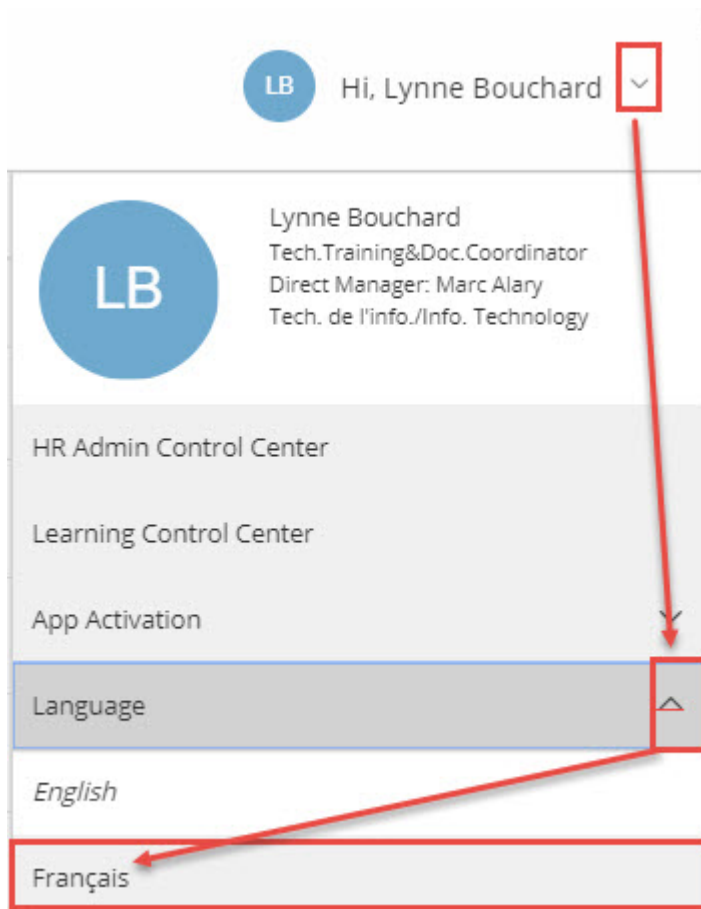
3. The icon represented by a house provides access to the Halogen home page.



## Changing the interface language

This application is available in both official languages, so you can work in the language of your choice.

1. The interface changes to French as soon as you select **Français**. However, when you change the language you are taken back to the Home page and not to the page you were on when you changed the language.



The default language is set when a user account is created. Forms for the user will always appear in the user's preferred language. Whether you are using the French or the English interface, however, forms are always displayed and published in the preferred language chosen for the user when the account was created.

Write my self-evaluation

IrenaSept MarkovinovicSept

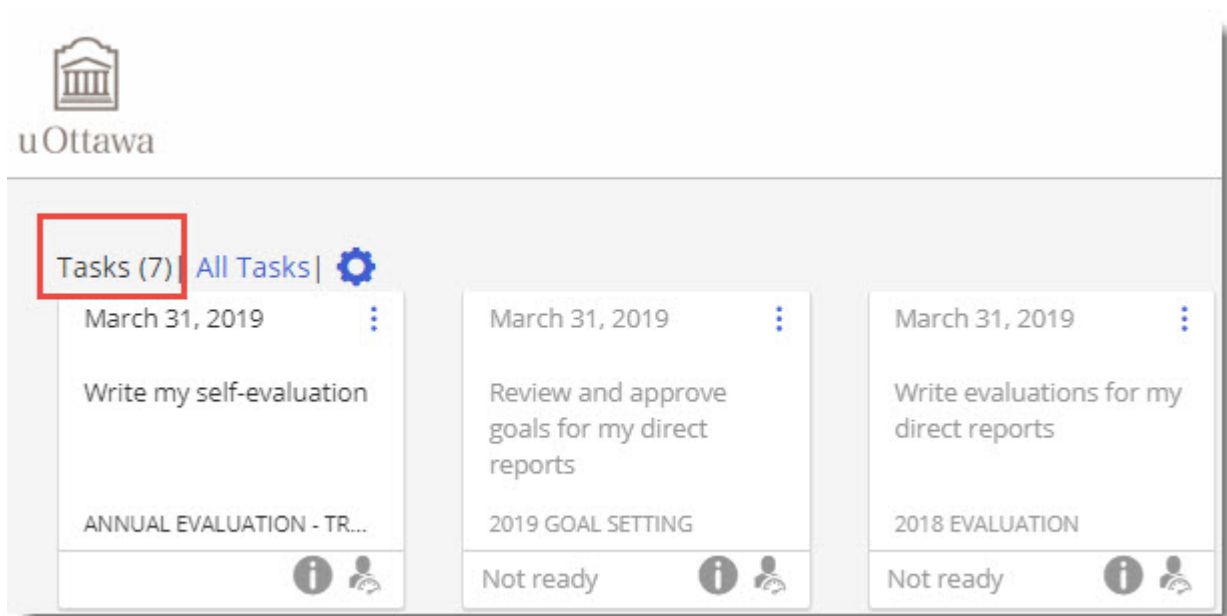
2018 EVALUATION  
By IrenaSept MarkovinovicSept



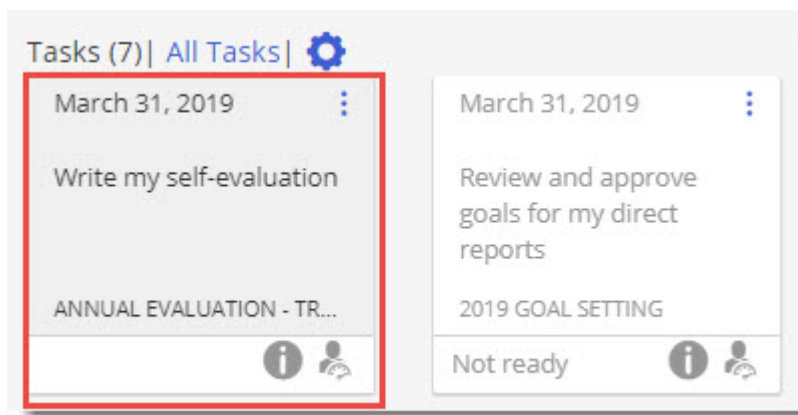
## Tasks

In Halogen, steps to be completed in the ongoing process are considered “tasks.” Employees’ tasks may be, for example, entering their goals in an online form, and submitting them to their supervisor for review. Supervisors, of course, have a greater number of tasks since they must enter their own goals in addition to reviewing and approving the forms submitted by each employee that reports to them.







The system displays the list of steps (tasks) for the various processes that must be completed by the employee under the Tasks section.










Just click on the name of the task to start the process.



## Icons in Halogen Forms

Icon	Function or meaning
	Links a goal to an organizational goal.
	Erases a title, description, due date or success indicator of a goal.
	Indicates the goal is linked to an organizational goal.
	Indicates a date field that opens a calendar to enter a date.
	Starts spell checker. You will be asked to set the language.
	Adds a note.

Icon	Function or meaning
	Expands or collapses the form navigator pane.
	Prints the form.
	Built-in language checker reviews text for any offensive or potentially embarrassing words or statements and suggests alternatives.
	Split screen function.
	Closes the form.
	View the objectives, development plans, feedback and documents entered by the employee.
	View the forms that have been completed by the employee in previous years.

## The form navigator pane






Each form (performance evaluation, goal setting, end of probationary period, mid-year evaluation, etc.) has multiple sections. The form navigator pane allows you to easily and quickly move between sections.

The form navigator pane appears to the left of the form. You can use either the form navigator or the scroll bar to move from one section of a form to another, although the navigator pane allows you to do so more quickly.



Discuss with my manager and write my goals

2019 GOAL SETTING  
B:

 Print     Spelling     Check Language     Employee Records     Appraisals

**Form Navigator** <

- Performance & Development Agreement
- EMPLOYEE INFORMATION
- GOAL SETTING DISCUSSION MEETING
- NEW GOALS FOR THE YEAR 2019
- KEY COMPETENCIES
  - Planning
  - Initiative
  - Service Excellence
  - Teamwork and cooperation
- DEVELOPMENT PLAN FOR THE YEAR

Performance

**EMPLOYEE INFORMATION**

Name:

Supervisor Name:

Employee Number:

**GOAL SETTING DISCUSSION MEETING**

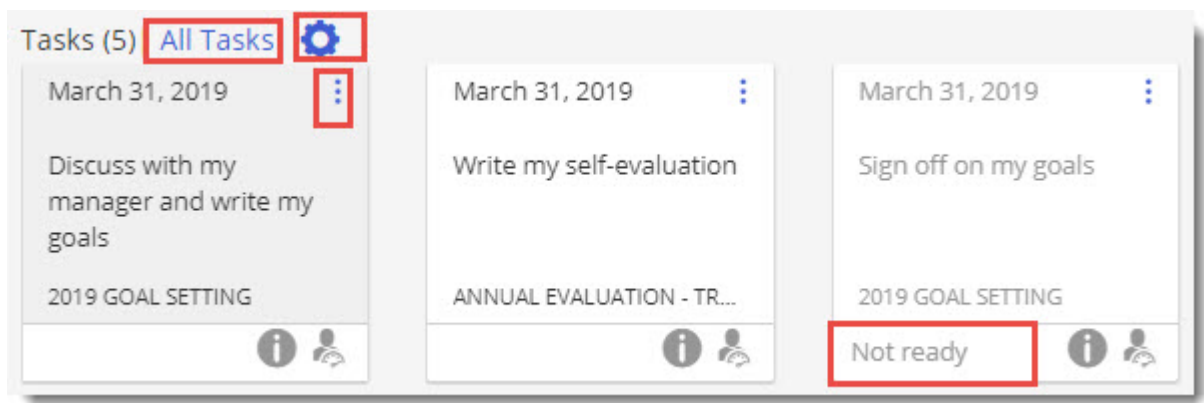



# Main functions

## Tasks to complete

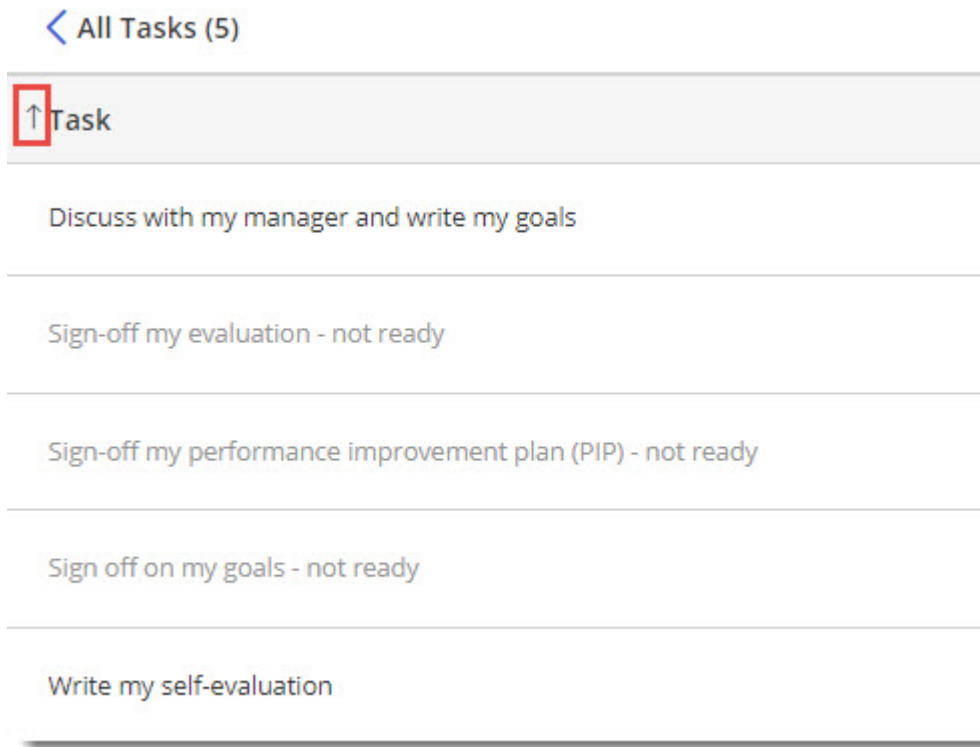
The **Task** section provides employees and supervisors with an overview of any tasks they have yet to complete (their own tasks and those of any employees they have).

1. Users can display these tasks in grouped view, task view or in a single list. In addition, each column can be sorted in ascending or descending order.



2. The configuration icon  allows you to choose whether to display all tasks or to display only those that are ready to be completed.

- The **All Tasks** hyperlink allows you to display all tasks in a linear fashion and to change the sorting of the columns display by clicking on the column name.

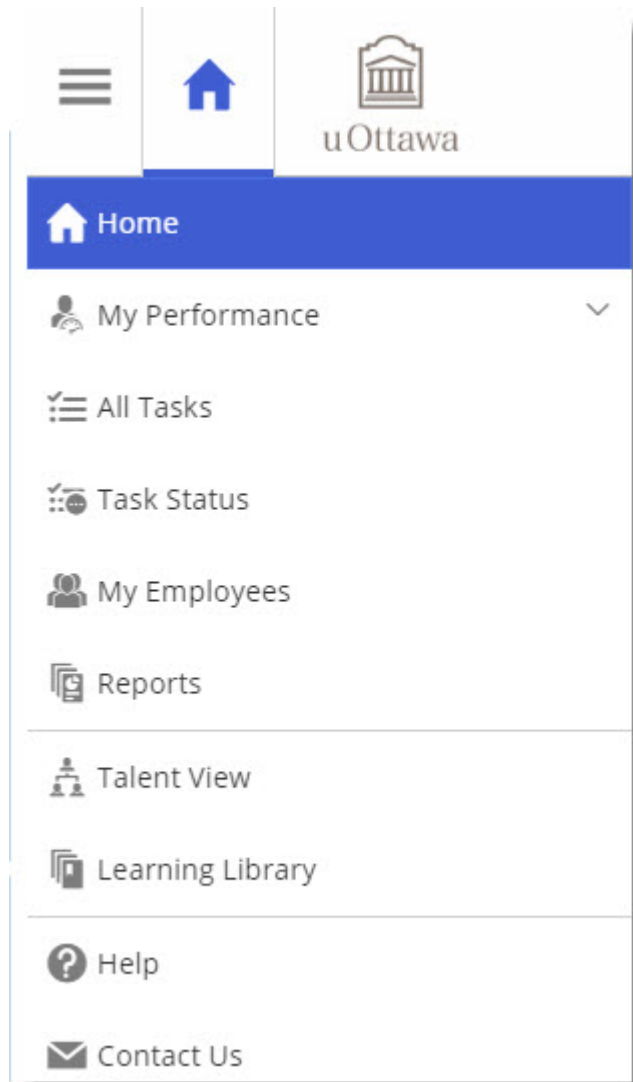


The screenshot shows a web interface titled "< All Tasks (5)". Below the title is a table with a header row and five data rows. The header row has a column name "Task" preceded by an upward-pointing arrow icon, which is highlighted with a red square. The data rows contain the following task descriptions:

↑ Task
Discuss with my manager and write my goals
Sign-off my evaluation - not ready
Sign-off my performance improvement plan (PIP) - not ready
Sign off on my goals - not ready
Write my self-evaluation

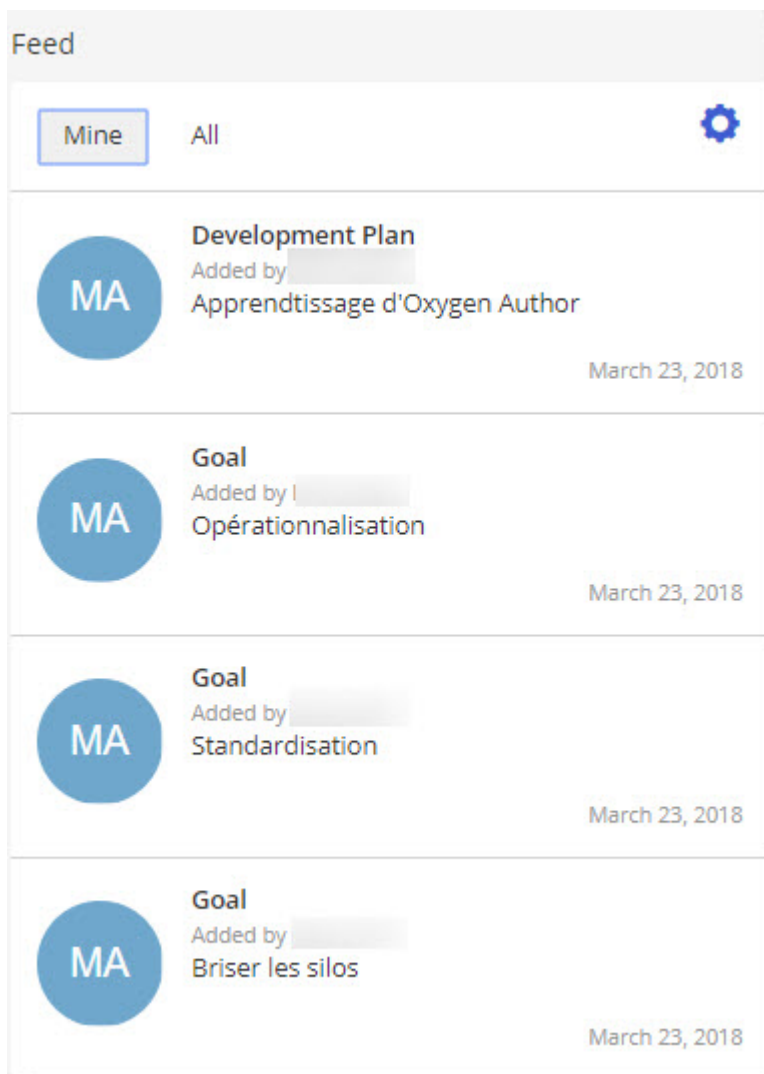
- The system indicates the status of the task and the due date.
- Usually, you receive an email informing you that you have a task to complete or perform. The message may include your username, temporary password, and a link to launch the application.
- On the home page, the **Tasks** section displays all the processes or steps that require your participation.

7. At the end of the process, after the final approval of the form by the supervisor, the form is moved to the My Performance section under Assessments accessed by clicking on the main menu icon.



## Feed

The **Feed** allows you to instantly see the feedback you've received, changes to your goals, updates to your development plans, and more. For example, if your manager adds a new goal for you, a notification will inform you in the Feed.

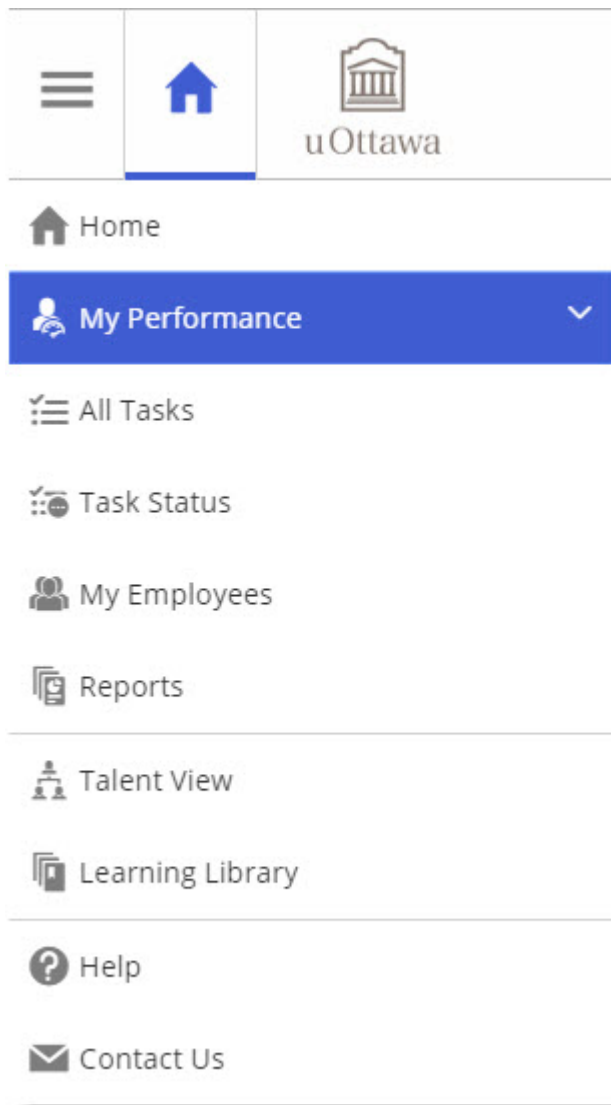


1. Changes made to goals and development plans appear only after the goal setting process has been completed, i.e., after the supervisor has given final approval.
2. The group of tabs that displays in the **Feed** depends on the user type.
  - a. Employees: **Mine**.
  - b. Supervisors: **Mine** and **All**.

# My Performance

## My Performance


**My Performance** is a centralized portal where a user can access and update performance information in the following sections:



- Goals

- Adding a development plan
- Adding a journal note
- Evaluations
- Documents

Supervisors have access to these same five sections in the **My Employees** page.

 **Important:** If you add goals or development plans in **My Performance**, this information is not automatically added to the goal setting form completed at the start of the performance evaluation cycle. As a result, these goals and development plans will not be formally evaluated at the end of the cycle.

## Adding a goal

A goal is a target that an employee is encouraged to reach, generally within a specified period of time. Goals can be added by both employees and supervisors. An employee can also add goals after an evaluation has taken place. Employees and supervisors can consult the employee's goals at any time. Goals entered in the goal setting form will appear in this section once the goal setting process has been completed.

1. Supervisors: click **View My Employees** and then click the name of the employee for whom a goal is to be added.
2. Click **Goals** and then click **Add**.

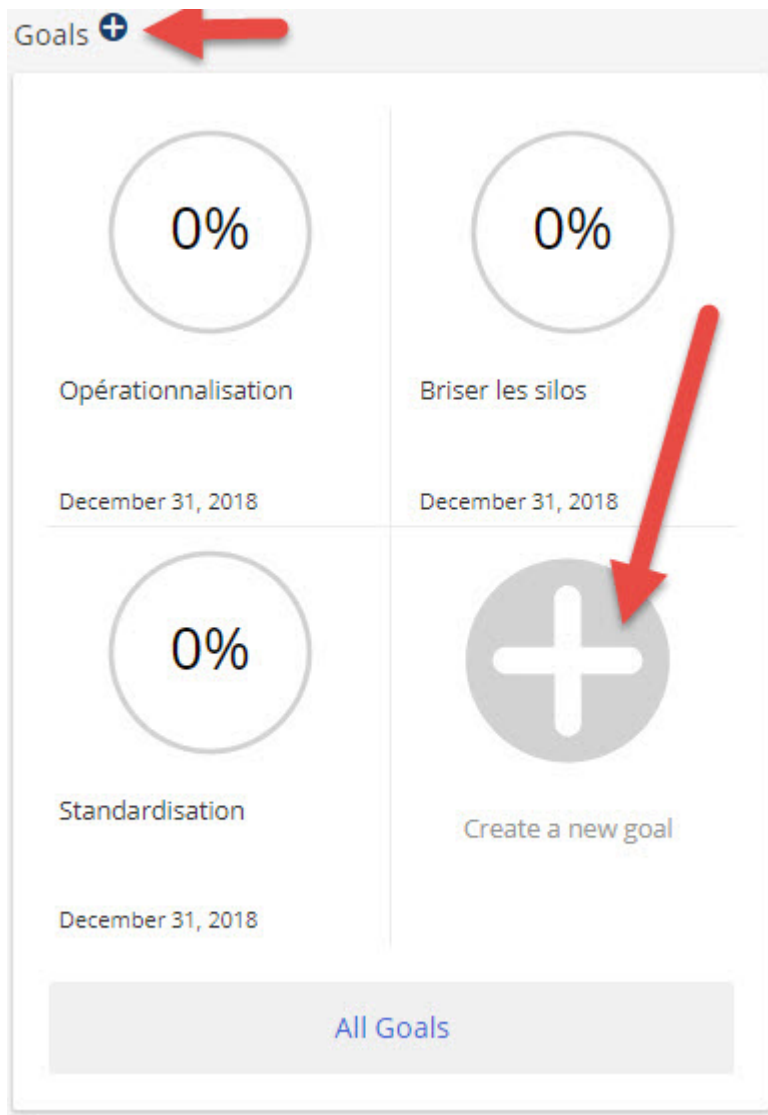
NB: The objectives you added will not be kept in the goal setting form that you completed at the beginning of the cycle.



3. *Employees:* Click the plus sign icon from the *Goals* section.



from the *Goals*



4. Enter the goal **Title** .

< Goal details Save

100%

Title \*  
Goal title

Due date  
December 21, 2018

Description  
Detailed description of the goal.

Start date  
January 1, 2018

Completed date  
December 14, 2018

On Track At Risk  
Not on Track No Flag Set

Additional details

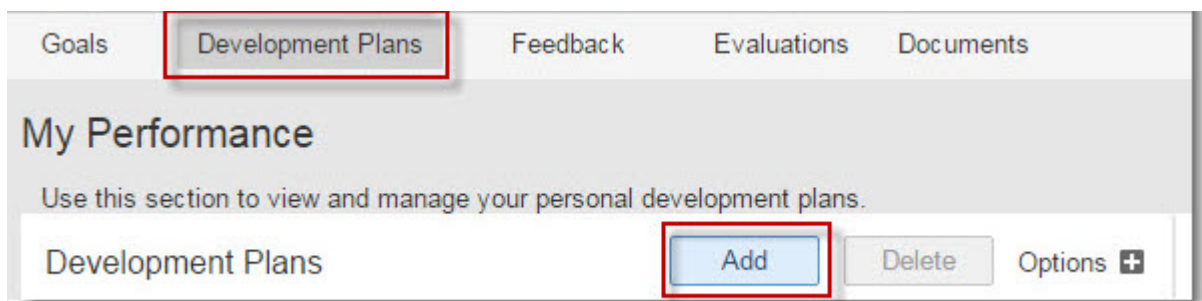
Status Last modified: December 5, 2018

5. Click on the calendar icon next to the **Due Date** field and select a due date.
6. Provide a detailed description of the goal in the **Description** field.
7. Click on the calendar icon next to the Start **Date field** and select a start date.
8. (Optional)Click on the blue dot inside the large circle and turn the dot clockwise to indicate the percentage
9. (Optional)Select a goal status(**On Track** , **Not on Track** , **At Risk** or **No Flag Set** )
10. Click **Save** .

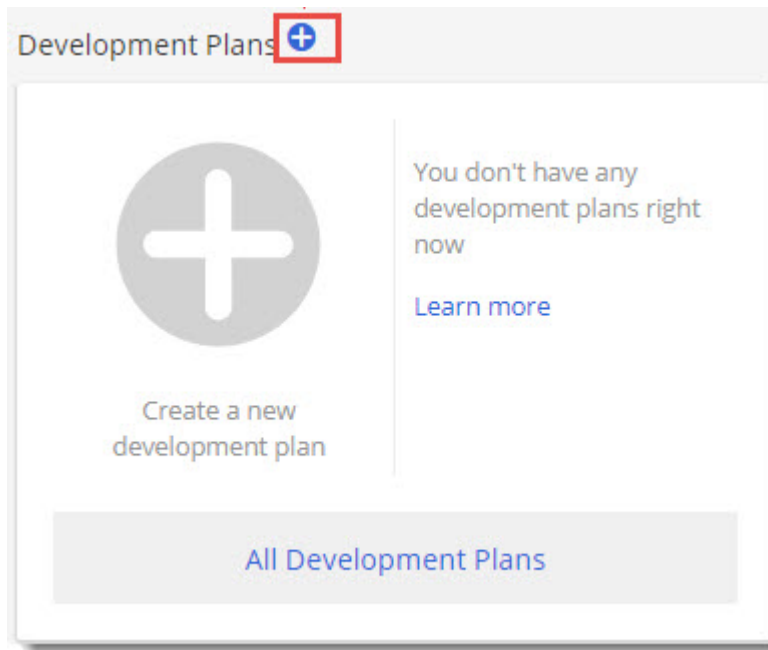
## Adding a development plan

A development plan added here will not be added to the goal setting form completed at the start of the cycle.

1. *Supervisors*: click [View My Employees](#) and then click on the the name of the employee for whom a development plan is to be added.
2. *Supervisors*: Click [Development Plans](#) .
3. *Supervisor* : Click [Add](#).



4. *Employees:* Click on the plus sign icon in the **Development Plans** section.



5. Enter a title in the **Title** field.

**Add Development Plan** [X]

**Details** | Development Activities

Employee: Stéphane Boucher

\* Title:

Description:

Related Competency:  Entered By: Stéphane Boucher

Created Date:

Due Date:

Status: **Not Started**  Completed Date:

**Notes**

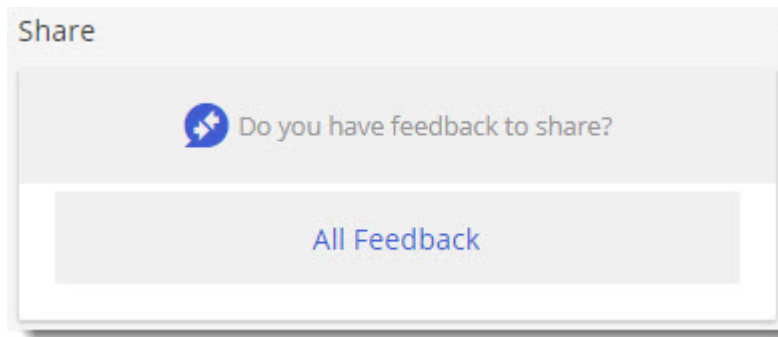
**OK** **Cancel**

6. Provide a detailed description of the development plan in the **Description** field.
7. Click on the calendar icon next to the **Due Date** field and select a due date.
8. Click **OK**.

## Adding a journal note


Employees can use the journal notes section to track their achievements during the year, which can be helpful at evaluation time. For example, a journal note could be added to note registrations increased by 2 %.

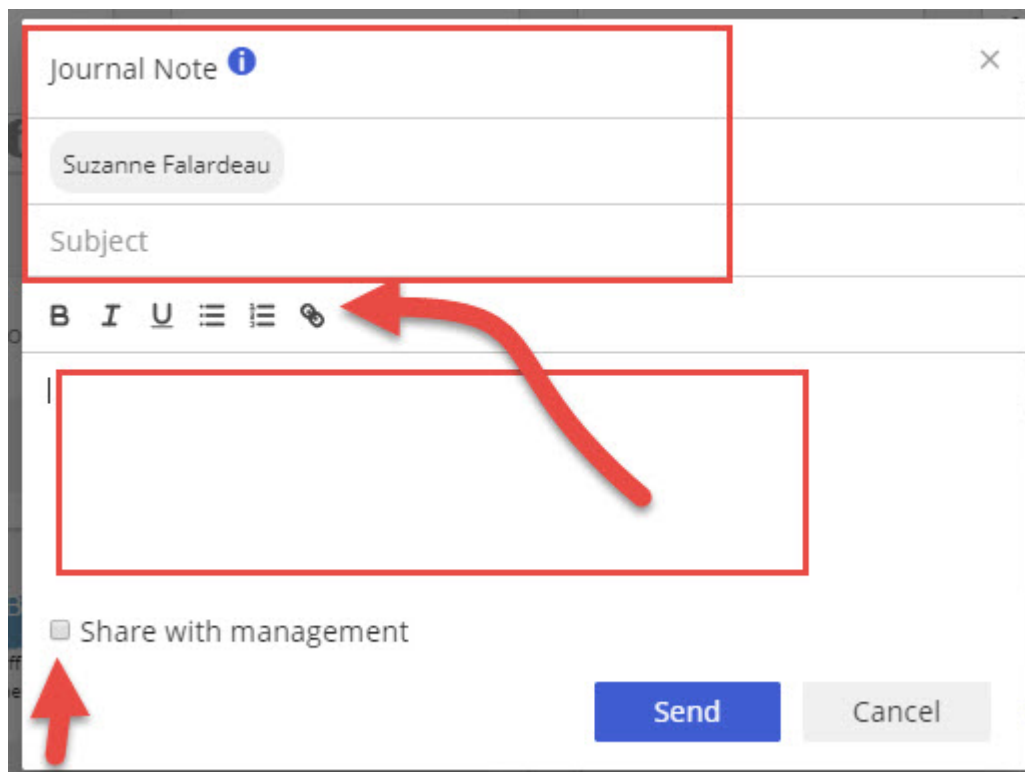
1. Click on [Do you have feedback to share](#) .




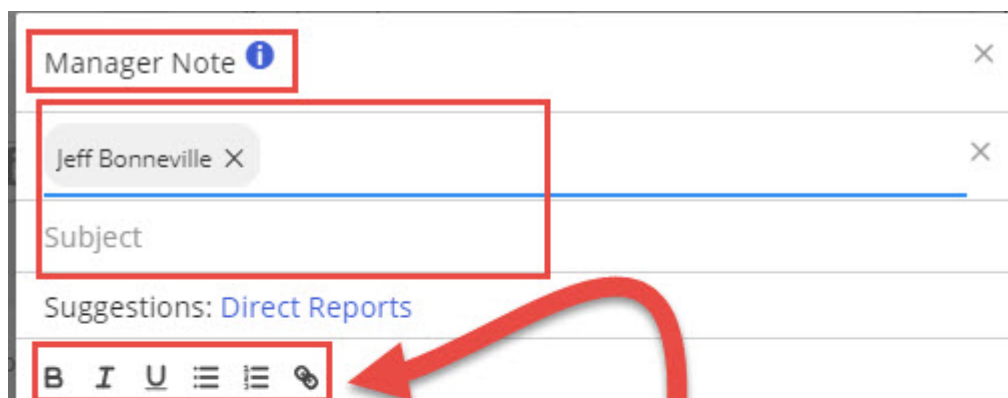
2. Click on one of the two icons.



- Employees: Click the first icon  to enter a comment or a feedback related to your performance.

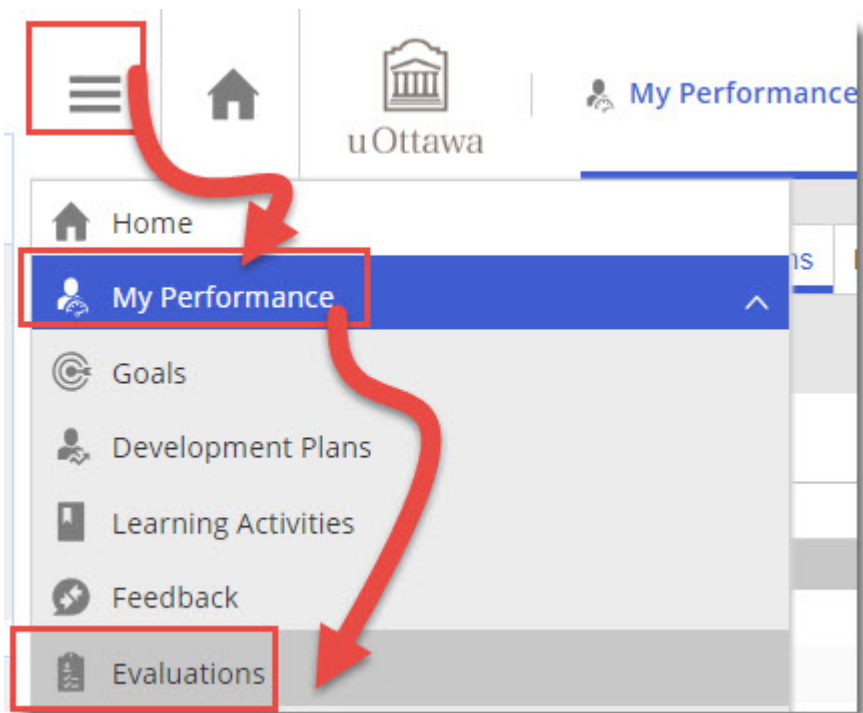


- Supervisors : Click the second icon  to enter a comment or feedback related to one of your employees.




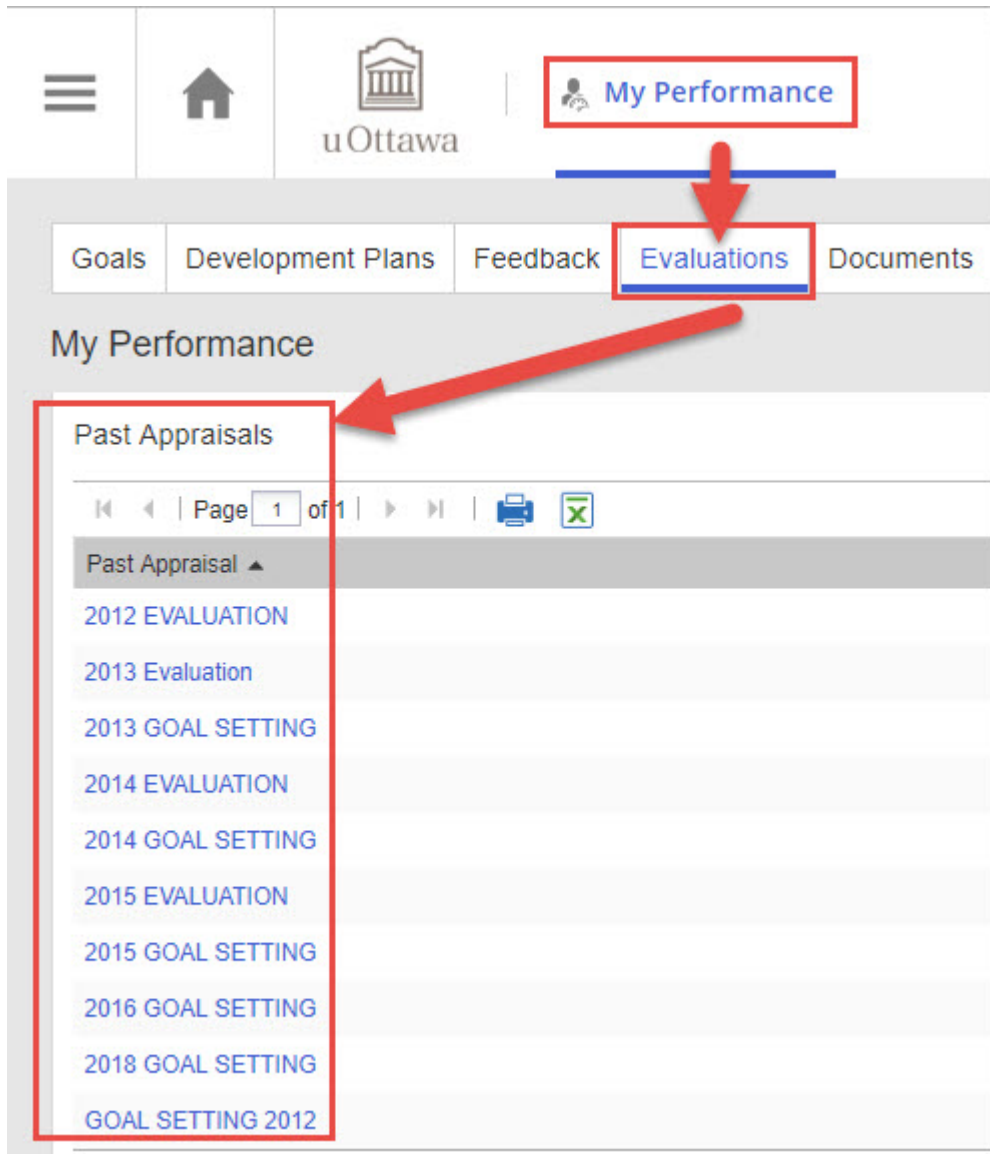
## Evaluations

Supervisors may review their own forms and evaluations as well as those of their employees at any time. This allows supervisors to monitor both personal and employee progress.





 **Note:** Past appraisals and goal settings forms have not been imported into Halogen. Therefore, 2012 is the first annual performance evaluation cycle to be recorded in Halogen. Once the 2012 goal setting process is complete, this form will appear in the **Evaluations** section.



The screenshot displays the 'My Performance' section of the Halogen system. At the top, the 'My Performance' header is highlighted with a red box. Below it, a navigation bar contains tabs for 'Goals', 'Development Plans', 'Feedback', 'Evaluations', and 'Documents'. The 'Evaluations' tab is selected and highlighted with a red box. A red arrow points from the 'Evaluations' tab to the 'Past Appraisals' section below. The 'Past Appraisals' section is also highlighted with a red box and contains a list of evaluation cycles. The list includes '2012 EVALUATION', '2013 Evaluation', '2013 GOAL SETTING', '2014 EVALUATION', '2014 GOAL SETTING', '2015 EVALUATION', '2015 GOAL SETTING', '2016 GOAL SETTING', '2018 GOAL SETTING', and 'GOAL SETTING 2012'. A red arrow points from the 'Evaluations' tab to the 'Past Appraisals' section.

Past Appraisal ▲
2012 EVALUATION
2013 Evaluation
2013 GOAL SETTING
2014 EVALUATION
2014 GOAL SETTING
2015 EVALUATION
2015 GOAL SETTING
2016 GOAL SETTING
2018 GOAL SETTING
GOAL SETTING 2012

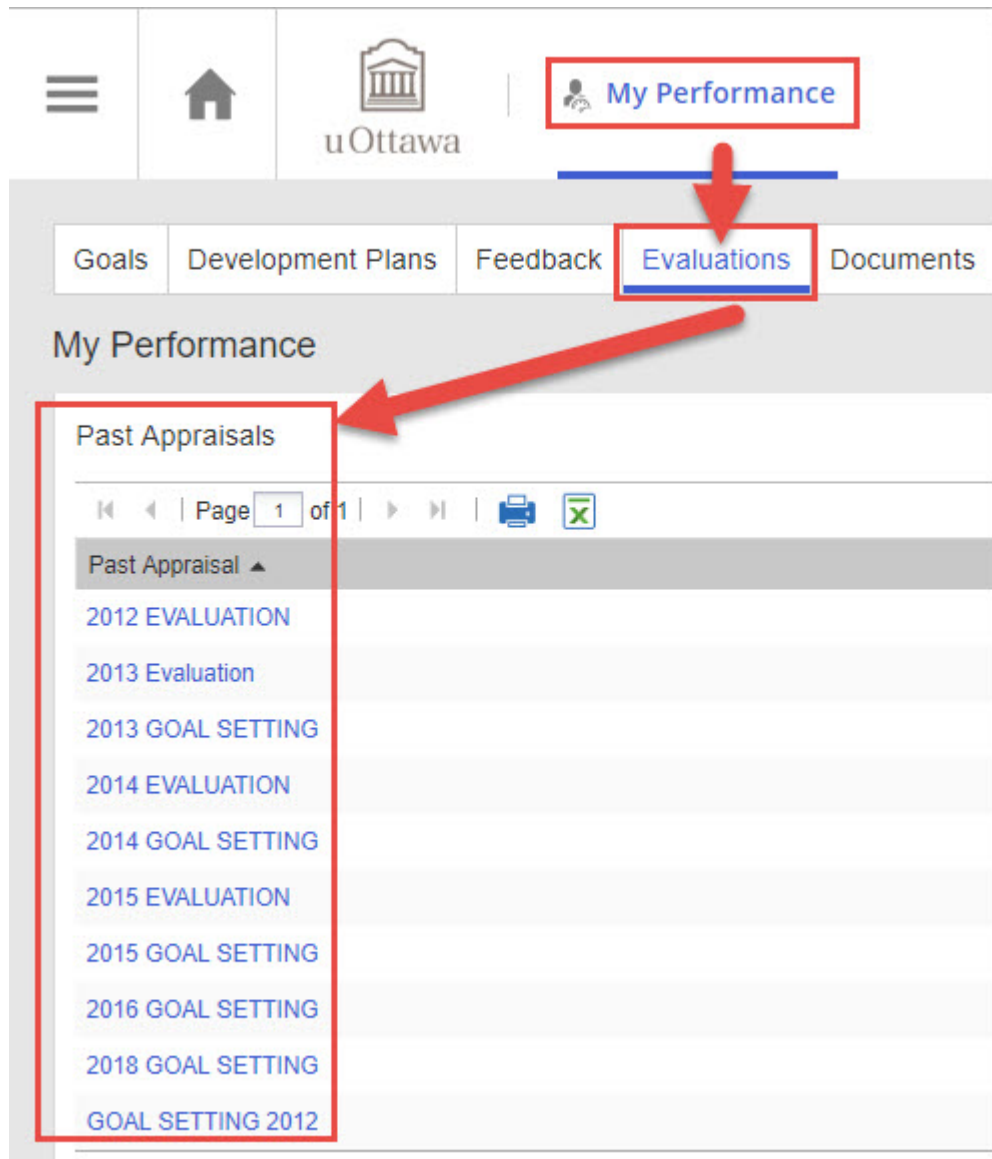
## Print a completed form

1. Click the **Main Menu Icon**



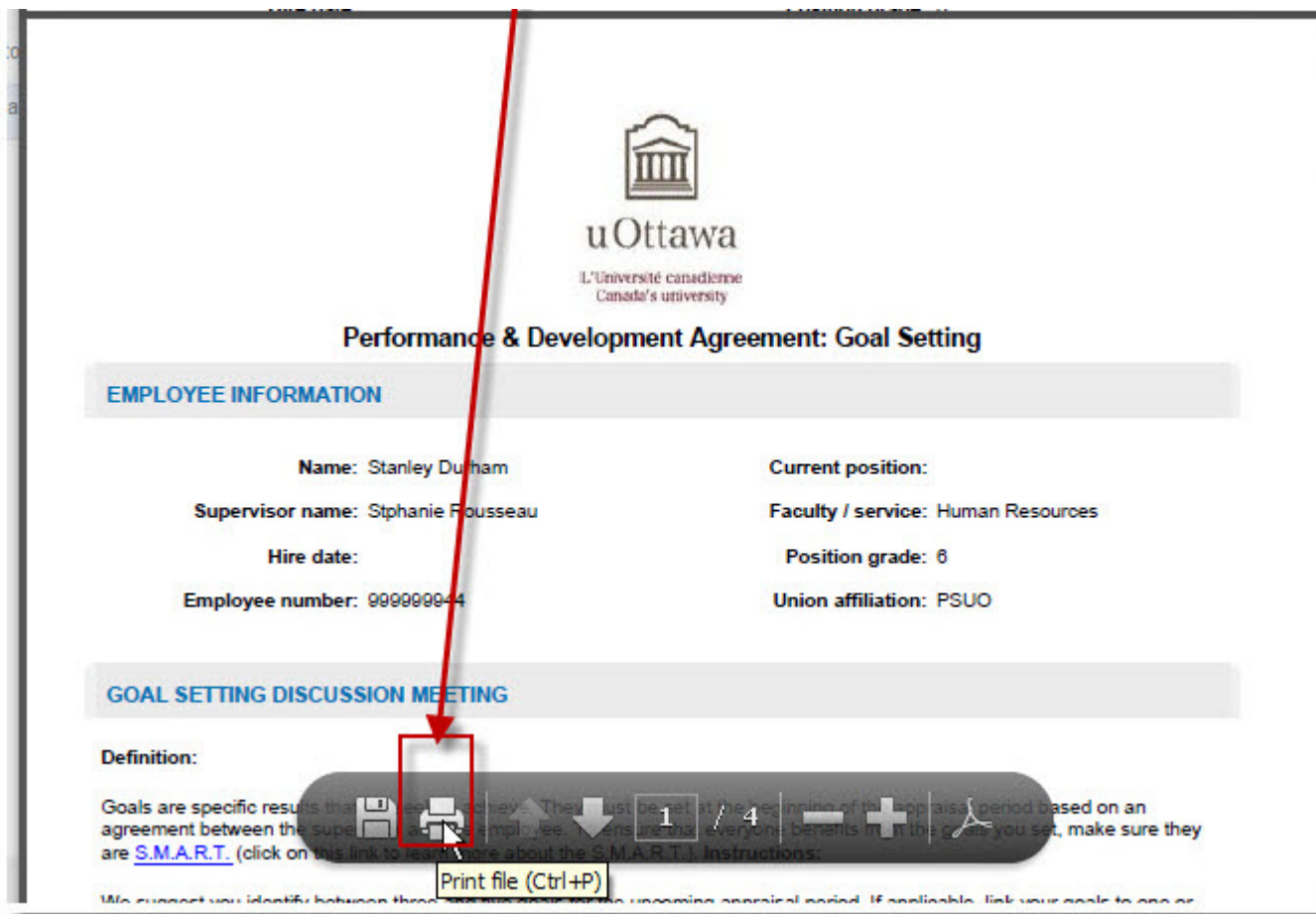
2. Select **My Performance**.
3. Select **Evaluations**.

- Click on the name of the form to be printed in order to create a PDF document.



- Once the PDF form appears, place your cursor at the bottom of the document to view the translucent Adobe toolbar.
- Click on the printer icon on the toolbar.

7. Click **Print** to send your document to the printer.



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Canada's university

### Performance & Development Agreement: Goal Setting

#### EMPLOYEE INFORMATION

**Name:** Stanley Durham  
**Supervisor name:** Stphanie Fousseau  
**Hire date:**  
**Employee number:** 999999944

**Current position:**  
**Faculty / service:** Human Resources  
**Position grade:** 6  
**Union affiliation:** PSUO

#### GOAL SETTING DISCUSSION MEETING

**Definition:**  
Goals are specific results that employees achieve. They must be set at the beginning of the appraisal period based on an agreement between the supervisor and employee. When setting everyone's benefits in mind, the goals you set, make sure they are **S.M.A.R.T.** (click on this link to learn more about the S.M.A.R.T.). Instructions:

We suggest you identify between three and five goals for the upcoming appraisal period. If applicable, link your goals to one or

**Print file (Ctrl+P)**

## Adding a document

Employees can add, consult and delete performance-related documents for themselves. Supervisors can add, consult and delete performance-related documents for themselves and their employees.

Supervisors can set document visibility parameters (access) for any documents they add for an employee by selecting the **Employee and Management** or the **Management** radio button.

Users can add documents with the following filename extensions :

- .PDF
- .DOC

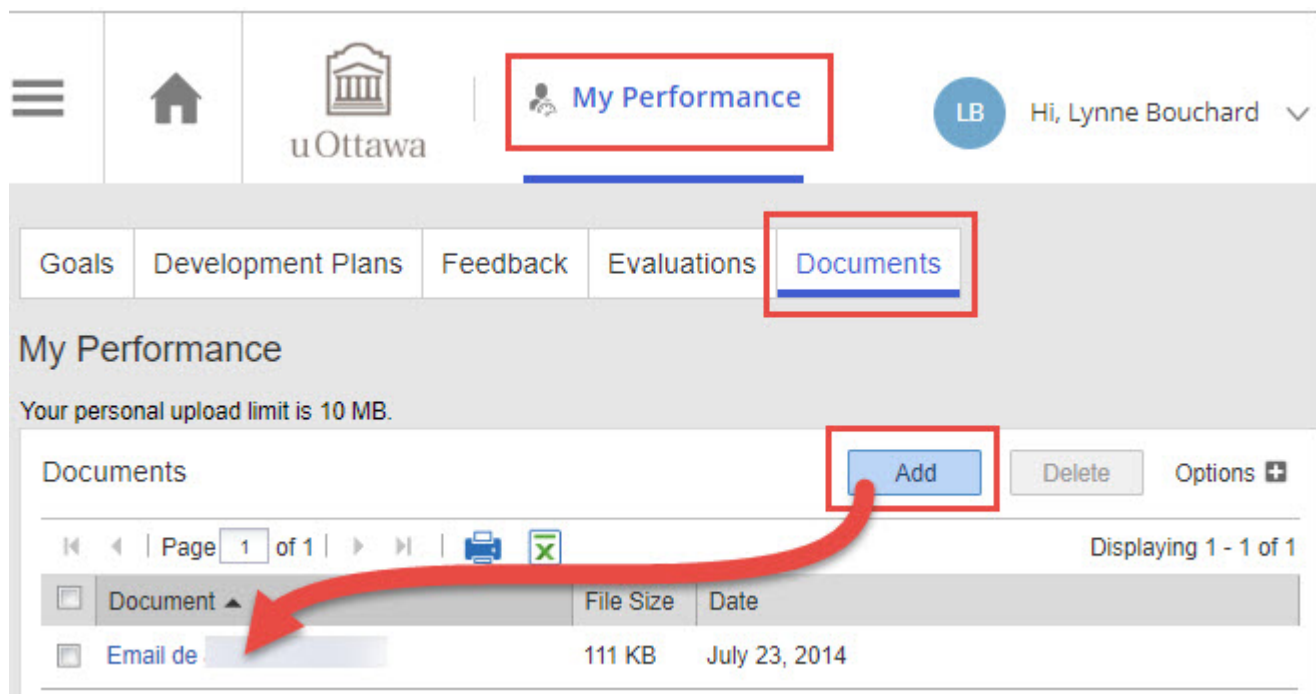
- .DOCX
- .TXT
- .XLS
- .XLSX
- .JPG
- .GIF
- .BMP

1. Click the **Main Menu Icon** .

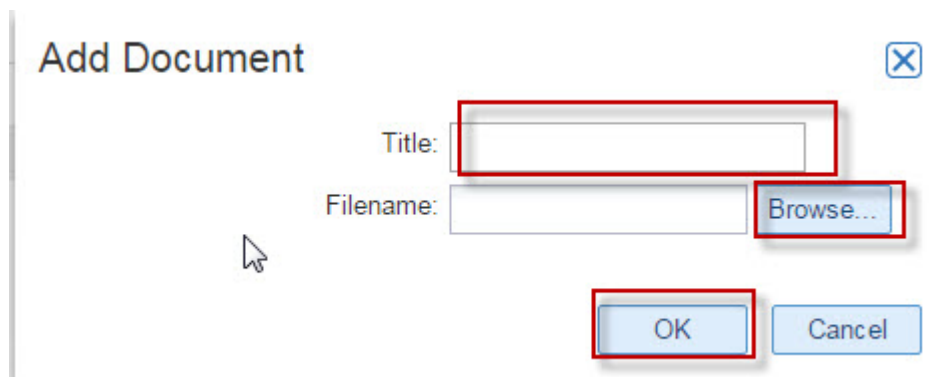


2. Select **My Performance** .
3. Select **Documents** .

4. Click **Add**.

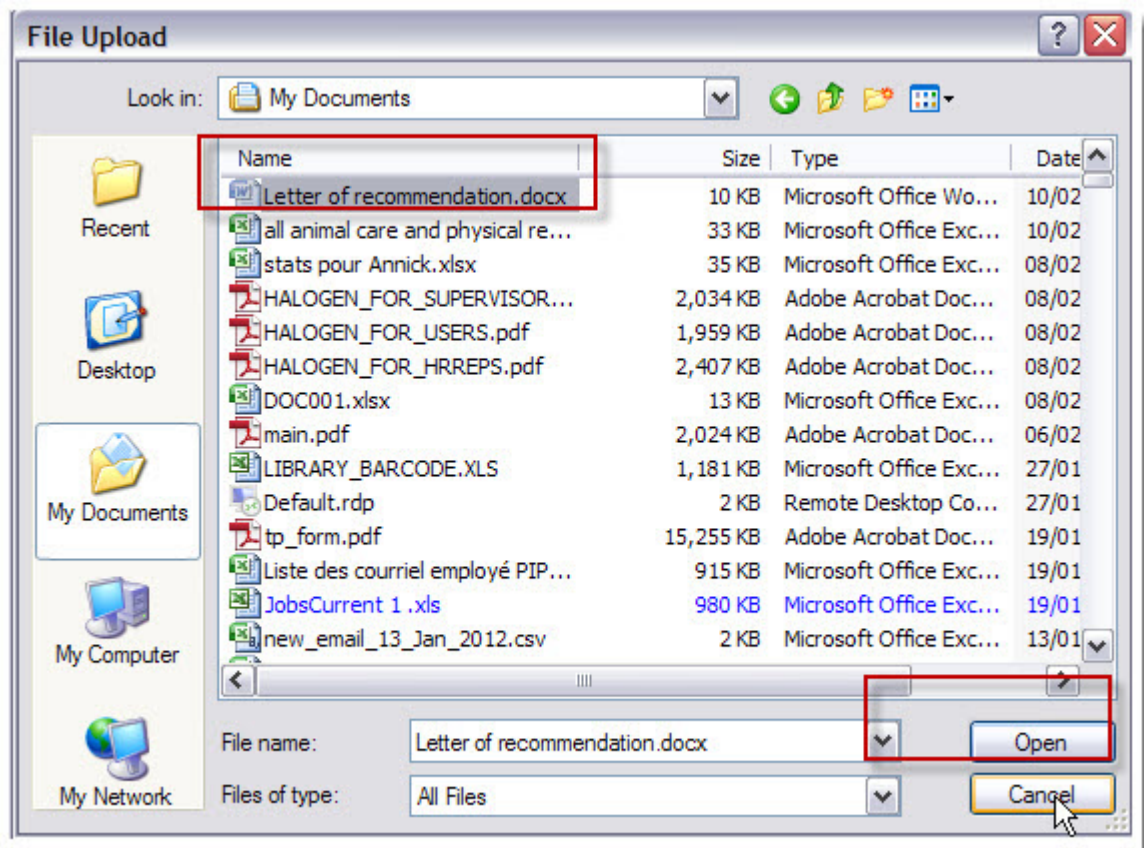


5. Enter a title for the document in the **Title** field.
6. Click **Browse**.



7. Locate and click on the document to be added.

8. Click **Open**.



9. Click **OK**.

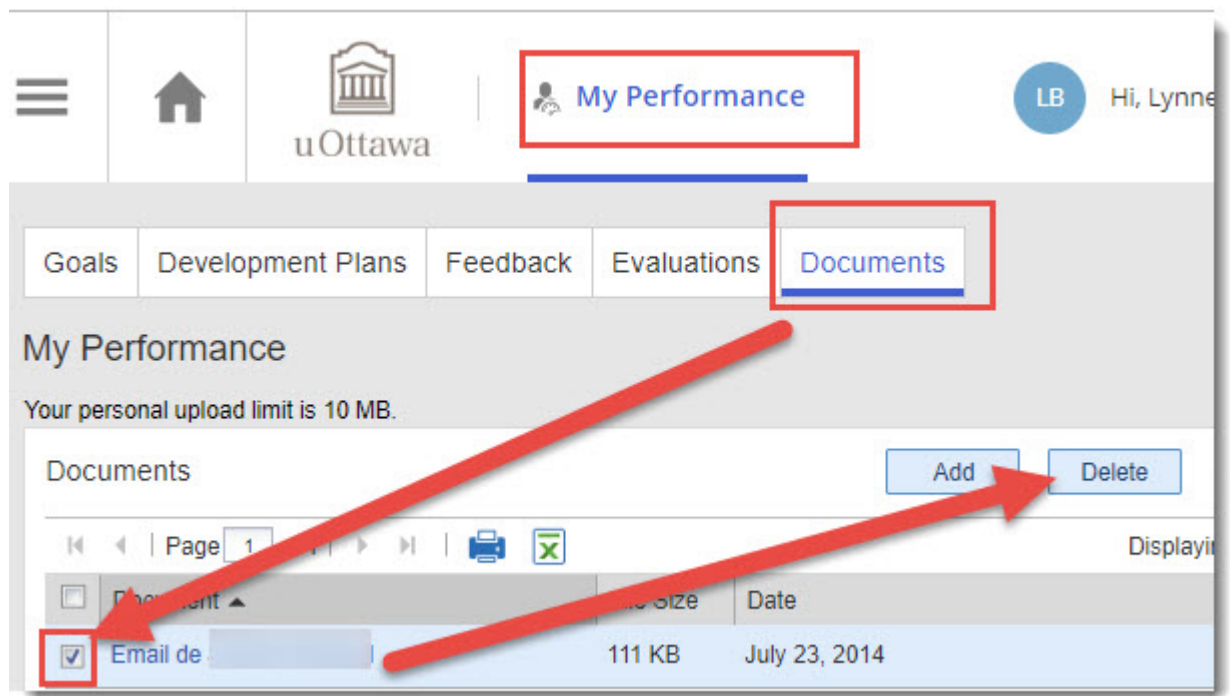
## Deleting a document

You can delete a document from the **Documents** section.

1. Click the **Main Menu Icon**.



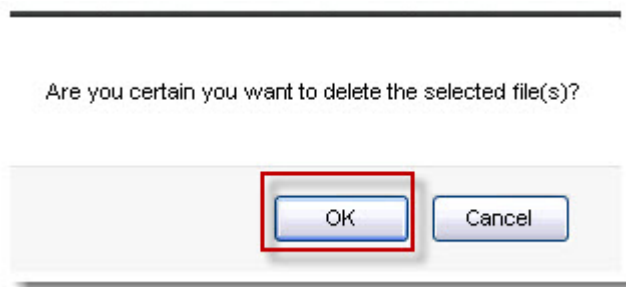
2. Supervisors: Select **My Performance** then select **My Employees**
  - a. Select **My Employees** .
  - b. Click on employee's last name.
  - c. Click on the **Documents** tab.
3. Employees : Select **My Performance** then select **Documents** .
4. Click the **Documents** tab.



5. Put a checkmark in the box next to any documents to be deleted.
6. Click **Delete** .



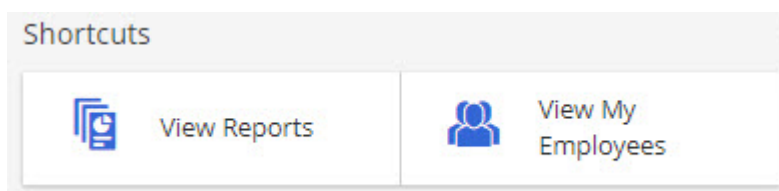
7. Click **OK**.



## My employees

Supervisors have access to the **My Employees** area, which provides a list of all direct report employees and their records.

Supervisors responsible for many employees can enter a full or partial employee name in the search box, use the advanced search function or activate a list filter.



A supervisor can set the filter to show the records of Direct Reports or All Reports. Therefore, supervisors can view:

1. Employees who report directly to them.
2. Employees who report directly to them and that employees direct reports.

3. The **My Employees** section uses icons to indicate which employees have other employees reporting directly to them and/or which employees report two more than one supervisor simultaneously (secondary managers).

Home My Performance **My Employees** Task Status Reports Talent

**My Employees** Feedback

Search First and/or Last Name Search Show All

Employees

Page 1 of 1

First Name ▲	Last Name	Direct Manager	Relationship
Natacha	St-Benoît	Stéphane Boucher	
Patricia	Deschamps	Stéphane Boucher	
Peter	Ely	Stéphane Boucher	
Pierre	Bercier	Stéphane Boucher	
SuzanneTEST	Bali-CourtemancheTEST	Stéphane Boucher	

**Direct Reports**

- Lamothe, Fran
- MarkovinicT
- IrenaTEST
- St-François, D

Click icon to list.

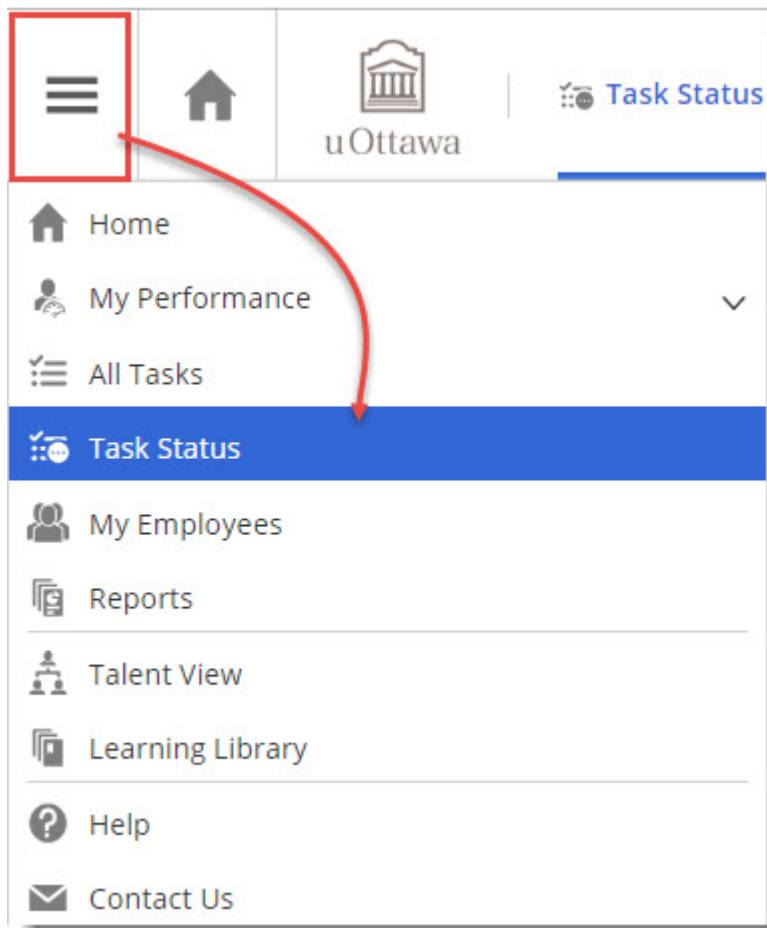
The icon legend appears at the bottom of the **My Employees** page.

Legend:  Direct Reports

## Task status

This section allows supervisors and Human Resources administrators to consult their own tasks and their employees' tasks.

Supervisors and administrators can view the details for an individual step in the process or an overview of the tasks for all process steps.



Note, however, that the overview is available only for the supervisors and administrators responsible for a particular process and the employee involved in the process.

Home My Performance My Employees **Task Status** Reports

**Tasks** Overview

### PERFORMANCE EVALUATION FOR EMPLOYEES ON PROBATION

07/01/2013  
End of probation - Write evaluation(s) for my direct rep...  
**2 To-Dos**

07/01/2013  
End of probation - Employee sign-off

07/01/2013  
End of probation - Sign-off approval second level  
**2 Not Ready**

Search First and/or Last Name

#### Tasks

Page 1 of 1

<input type="checkbox"/>	First Name ▲	Last Name	End of probation - Write evaluation(s) for my direct rep...
<input type="checkbox"/>	Patricia	Deschamps	<b>2</b> <a href="#">Edit Form</a>
<input type="checkbox"/>	Pierre	Bercier	<b>2</b> <a href="#">Edit Form</a>

The overview display shows where each of the reports is in the process.

The example below shows that three employees have to complete the goal setting process and one has already completed it.

Home My Performance My Employees **Task Status** Reports Tale



Tasks **Overview**




## PERFORMANCE EVALUATION FOR EMPLOYEES ON PROBATION

Direct Reports

Search First and/or Last Name

### Appraisal Process Overview

« | Page  of 1 | » |  

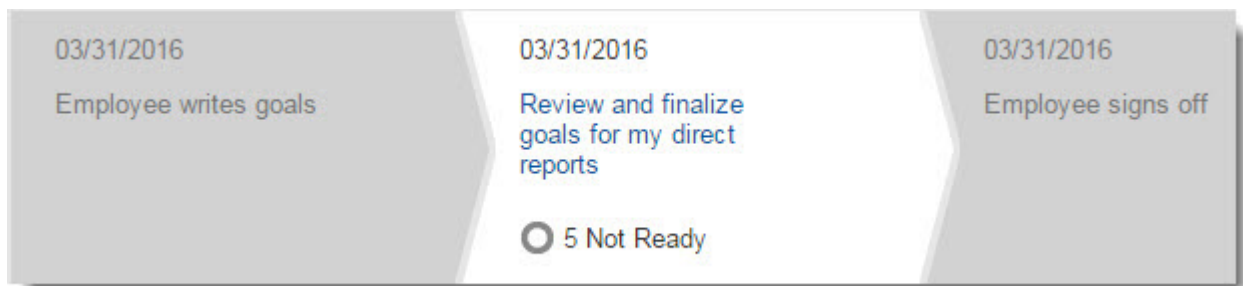
<input type="checkbox"/>	First Name ▲	Last Name	Direct Reports	End of probation - Write every direct report(s)
<input type="checkbox"/>	Patricia	Deschamps		 <a href="#">Edit Form</a> 07/01/2013
<input type="checkbox"/>	Pierre	Bercier		 <a href="#">Edit Form</a> 07/01/2013
<input type="checkbox"/>	SuzanneTEST	Bali-CourtemancheTES T		N/A



# Goal setting

## Setting goals

The process of setting goals is broken down into tasks done by either the employee or the employee's supervisor.



Start of the goal setting process: The supervisor schedules a meeting with the employee to set goals for the coming year, to identify the behaviours necessary to maintain or improve performance levels in each competency and to draw up a development plan that will allow the employee to achieve their goals and reach the required competency levels.

The employee must:

1. Enter the date of the meeting with the supervisor.
2. Add up to five goals
3. Enter the specific behaviours for each competency necessary in order to maintain or improve performance levels in each competency over the next evaluation period.
4. Enter a development plan.
5. Save the draft form (can be modified up until it is submitted for approval).
6. Submit the form for approval. The employee can no longer modify the form.

The supervisor must:

1. Review and finalize the employee's draft form. At this step, the supervisor can write directly in the form to make necessary changes.

2. If necessary, add comments to key competencies.
3. If necessary, add comments to the development plan.
4. Save the form.
5. Complete the form

End of the goal setting process

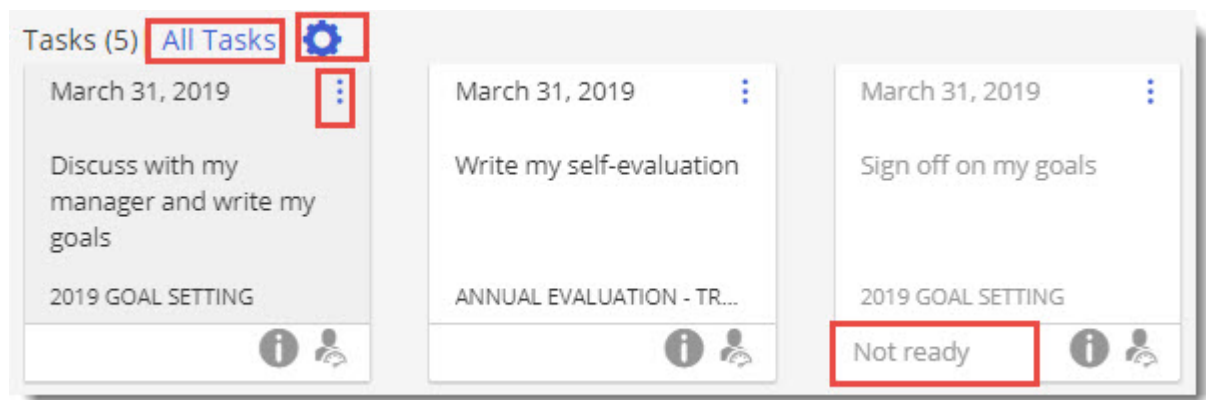
The employee approves the goal setting form. The form is now marked **completed**.

## Meeting to discuss goals

The first step in completing an annual evaluation is the employee–supervisor meeting in order to establish goals. Once the meeting has taken place, the employee drafts personal goals in Halogen.

Drafting goals (employees):


1. Click **Discuss with my manager and write my goals**.



2. Once the goal setting form opens, click the calendar icon in the meeting section, next to the **Date of discussion** field and select a meeting date



3. Select ☐ Yes to confirm that the meeting was held and that the goals were discussed with the supervisor.

Date of discussion:  

I have met with my supervisor to discuss these goals ☒ Yes ☐ No



## Adding a goal


All employees must write up their goals at the start of the annual performance management cycle. Halogen allows the employee to enter up to five goals. The steps below describe the process for drafting and editing a goal (for employees) and for editing a goal (for supervisors):

1. Under the heading  , type the title of the first goal.

**NEW GOALS FOR THE YEAR 2016**

**Title and description / Goal action items**

**Due:**  

**Measures of Success**

2. In the second box, type a detailed description of the goal.
3. Click the calendar icon next to the  box and select the required date.
4. In the  box, type one or more indicators.

5. Click the chain link icon to link the goal to an organizational goal.
6. Select one **organizational goal** the employee goal is to be linked to.

## Goal Link Details

Select one goal to link.

Process: 2016 GOAL SETTING

Category:

All

Organizational Goal:

- ☒ A rich, inspiring student experience
  - ☐ Academic Programs
- ☐ Communication
- ☐ Culture of performance and accountability
- ☐ Developing leaders through internationaliz...
- ☐ Developmental Projects
- ☐ Employee experience
- ☐ Employee experience
- ☐ Enhance Reputation / Profile
- ☐ Francophonie and bilingualism
- ☐ Grow Revenue

Description:

Copy and Link

Link

7. Click **Link**.
8. Click **Add New Goal** to add a goal.

 Add New Goal

## Linking behaviours to key competencies

The key competencies section is for recording the behaviours an employee must adopt or maintain in order to improve or remain at their level of performance for each of the four competencies. When a supervisor opens a form submitted by an employee, the supervisor is able to make changes to the form. Next section describes the steps for an employee to record behaviours.

1. In the **Areas of focus** box, the employee describes a behaviour that will help them acquire, maintain or improve their level for a given competency.

### Planning

Organize in time a series of actions or events in order to achieve an objective or a project. Plan and organize own work and priorities in regular daily activities.

**Areas of focus:**



2. Click **Add Anotation** to attach any comments.



3. Repeat steps 1 and 2 for each of the other competencies.

## Adding a development plan

Employees and supervisors can use the development plan section to describe possible training activities that would provide the employee with opportunities for career advancement or help the employee improve their skill level. The development plan can

be completed by either the employee or the employee's supervisor. To add a development plan, follow the steps below.

1. Give the development plan a title.



**DEVELOPMENT PLAN FOR THE YEAR 2016**

**Definition:**  
Professional development is the continuous process of acquiring new knowledge and skills that relate to the employment environment. It plays a key role in maintaining trained, informed, and motivated staff.

**Instructions:**

- Identify areas of improvement and/or development that will support the achievement of goals and competencies
- For employee: include career interests that will help provide opportunities for career advancement within the University
- Employee and supervisor: prepare an action plan that includes training, courses, workshops, etc. in order to develop the employee

Title:

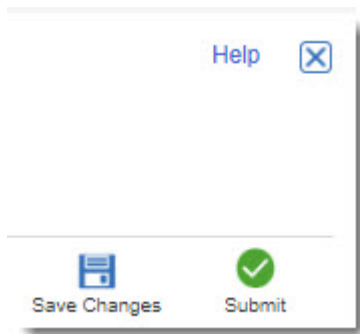


2. Enter a description of the proposed training activity.

## Saving the draft version

Click **Save Draft** furthering order to save the form and continue editing. When you have finished entering your plan(s), click **Submit**. The form can now be viewed but not changed and is submitted to the supervisor for review and approval.

1. Click **Save Draft**.



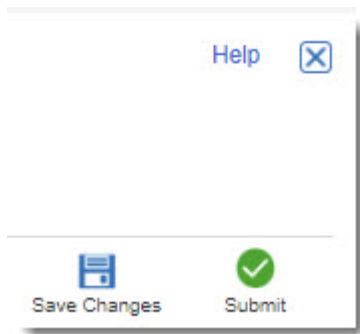
2. Click **OK**.



## Submitting a form for approval

Once there are no further changes to make to the form, it is submitted to the employee's supervisor for review and approval. A supervisor cannot view the form until the employee has submitted it for review and approval.

1. Click  once there are *no more changes to be made* to the form.



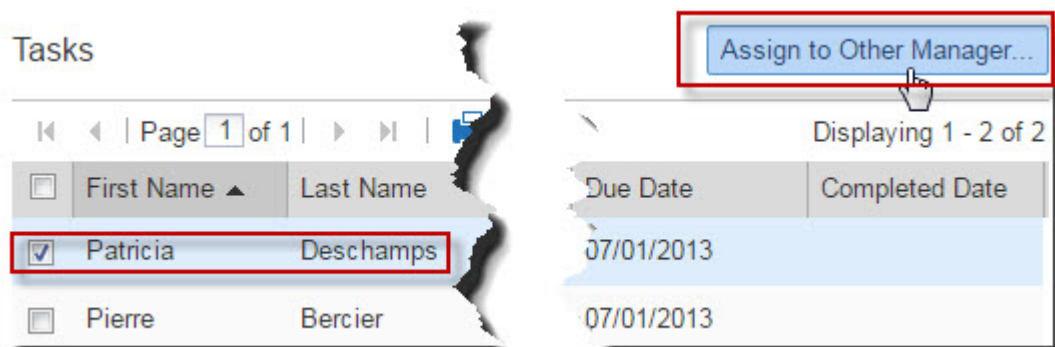
## Reviewing and approving goals

A supervisor can see on the **Home** page in the **You have tasks to complete in the ongoing process** section if there are forms to approve. The supervisor must then:

1. Click **Review and finalize goals for my direct reports**.

The following sub-steps can be done if the employee needs to be assigned to a different supervisor. If you do not need to assign the employee to another supervisor, go directly to step 2.

- a. Put a checkmark next to the name of the employee whose form must be assigned to another supervisor.
- b. Click on **Assign to Other Manager**.



2. Click **Edit Form**.

Halogen opens the employee's completed form and the supervisor can modify it.

3. In the form navigator, click **Goal Setting Discussion Meeting**.  
Make sure the meeting date has been entered and that the employee has selected Yes next to I have met with my supervisor to discuss these goals.

Discuss with my manager and write my goals

2019 GOAL SETTING  
B:

Print Spelling Check Language Employee Records Appraisals

Form Navigator

- Performance & Development Agreement
- EMPLOYEE INFORMATION
- GOAL SETTING DISCUSSION MEETING
- NEW GOALS FOR THE YEAR 2019
- KEY COMPETENCIES
  - Planning
  - Initiative
  - Service Excellence
  - Teamwork and cooperation
- DEVELOPMENT PLAN FOR THE YEAR

EMPLOYEE INFORMATION

Name:

Supervisor Name:

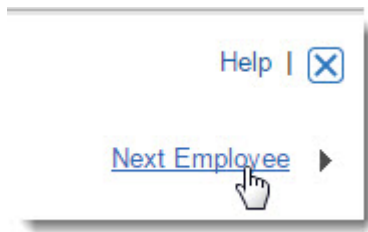
Employee Number:

GOAL SETTING DISCUSSION MEETING

4. Click **New Goals** and confirm that the goals match what was agreed upon with the employee. If not, enter the necessary modifications.
5. Click **Key Competencies** and confirm that the notes added match what was agreed upon with the employee. If not, enter the necessary modifications.
6. Click **Development Plans** and confirm that the notes added match what was agreed upon with the employee. If not, enter the necessary modifications.
7. Click **Save Draft** to save the form.



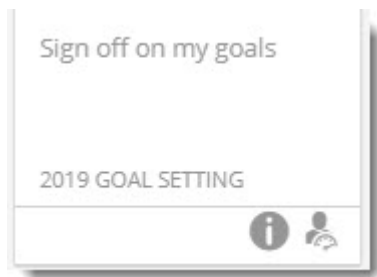
8. Click **Approve** to send the form back to the employee for the employee's final sign-off.
9. Click **X** in the red box to close the form.
10. (Optional) Click **Next Employee** (if there is more than one employee whose form needs to be reviewed and approved) .



## Employee final approval

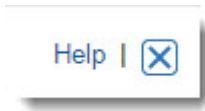
Once a supervisor has reviewed and approved an employee's goal setting form, the supervisor sends the form to the employee for approval. The employee must:

1. Click **Sign off on my goals** .



2. Click **Sign Off** .
3. Click **OK** .

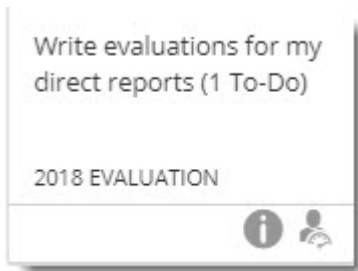
4. Click on the  to close the form.



# Self-appraisal Process

## Annual Appraisal Process

1. The year-end process contains many steps that must be completed successively by the employee, the supervisor, the second-level supervisor of the unit.



- a. Employee write his/her self-evaluation
  - b. Supervisor revises/writes evaluation, consults with the second-level supervisor and discusses with the employee
  - c. Second level supervisor adds comments
  - d. Supervisor signs-off the evaluation
  - e. Employee signs-off
2. The self-appraisal form finalizes the appraisal cycle. This form must be completed by all employees. It is in this form that scores for objectives and competencies are entered.

3. The self-appraisal form is available from the **Home** tab and you must click on **Write my self-evaluation** to begin the process.

Write my self-evaluation

ANNUAL EVALUATION - TR...

Information icon and user profile icon

4. The self-appraisal form allows you to enter goals if you have not previously completed the goal setting form. To enter goals you must click on **Add Past Goal**. However, if you have completed the goal setting form or you have entered goals and/or development plans using the **My Performance** tab, they will automatically be imported in the self-appraisal form.

2016 Goal	Outcome	Score
<b>Title:</b> Goal 1		3
SMART description of goal 1	Outcome of goal 1	/3
<b>Due:</b> 2016/10/14	<b>Completed:</b> 2016/09/15	
<b>Rating:</b> Achieved		
Measures of Success Measure of success for goal1		

Attach Feedback

Add Past Goal



5. If you have filled the goal setting form **but your supervisor has not opened the form**, your goals, competencies and development plan **will have not been added to the annual appraisal form**. It is possible to copy and paste the content of your goal setting form into the annual appraisal form. The following steps explain how to do this.
- Click **My Performance** tab
  - Click **Evaluations** tab
  - Click **Goal Setting**.
  - Simultaneously press on the following keyboard keys **SHIFT CTRL S** to be able to save your form on your desktop
  - Select the directory where the file needs to be saved and write a name of your document.
  - Close the PDF form opened with Halogen by clicking on the red box with the X located in the upper right section of the form.
  - Click on the Halogen **Home** tab.
  - Click on **Write my self-evaluation** to open the annual appraisal form.
  - Open the PDF form that you have saved on your desktop.
  - Go to the goal section of your PDF form and select the goal **Title** and on **CTRL C** on the keyboard.

- k. On the evaluation form of Halogen, bring the cursor in the box where the goal title must be typed and simultaneously press on **CTRL V** to insert the goal title.

6. The self-appraisal form allows you to enter notes in the key competencies if you have not previously completed the goal setting form. However, if you have added notes to the competencies section when you filled the goal setting form, they will automatically be imported in the self-appraisal form.

	Assessment	Rating Scale	Score:
<b>Planning</b> Organize in time a series of actions or events in order to achieve an objective or a project. Plan and organize own work and priorities in regular daily activities.	<input type="text"/>	Meets the Competency ▼	<input type="text" value="3"/>
<b>Initiative</b> Demonstrate creativity and initiative to suggest improvements and encourage positive results. Be proactive and self-starting. Show availability and willingness to go above and beyond expectations whenever possible.	<input type="text"/>	Meets the Competency ▼	<input type="text" value="3"/>
<b>Service Excellence</b> Reflect a positive attitude, demonstrate competence and professionalism, treat members of the community with respect, exercise care, devote full attention and find solutions. (Visit the section "Useful links" on the home page to read the detailed definition)	<input type="text"/>	Meets the Competency ▼	<input type="text" value="3"/>
<b>Teamwork and cooperation</b> Cooperate and work well with other members of the team to reach common goal. Accept and give constructive feedback. Adjust own behaviour to reach team goals.	<input type="text"/>	Meets the Competency ▼	<input type="text" value="3"/>

7. The self-appraisal form allows you to enter a development plan if you have not previously completed the goal setting form. However, if you have completed the goal setting form or you have added development plans from the My Performance tab, they will automatically imported in the self-appraisal form.

DEVELOPMENT PLAN PROGRESS REVIEW	
2012 Development Plan	Progress
<p><b>Title:</b> <input type="text" value="Technical writing training"/></p> <div>   </div> <p>Take a two-days training on technical writing to improve the quality of my user manuals.</p>	<p>The training was completed in July and I have already started integrated what I have learned and my user manual definitely look more professional.</p>

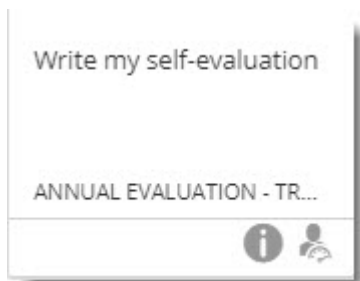
8. If the rating scale of at least one competency equals **Needs improvement**, the supervisor *must* complete the PDF form titled **PIP** (performance improvement plan). The supervisor *must* send an email to [performance@uottawa.ca](mailto:performance@uottawa.ca) to obtain the PIP form. Once the form is completed and signed by the supervisor and then signed by the employee, the PIP form must be send to Human Resources by email to [performance@uottawa.ca](mailto:performance@uottawa.ca). The supervisor **must also** add the PIP in the **Documents** tab on **My Performance**. Refer to *Adding a document* section of the present guide on how to import a document in Halogen.

## Steps for the self-appraisal process

All employees must complete the self-appraisal form in order to complete the annual performance appraisal process. If you have completed the goal setting form or if you have entered your goals and development plans in the My Performance tab, they will

appear in the self-appraisal form. However, if you have not yet entered goals for this year, you will be able to enter them in the next steps.

1. Click on **Write my self-evaluation**.



2. (Optional) Type a goal title in the box **Title**.

2016 Goal	Outcome	Score
<b>Title:</b> <input type="text" value="Goal 1"/>		<input type="text" value="3"/>
<input type="text" value="SMART description of goal 1"/>	<input type="text" value="Outcome of goal 1"/>	/3
<b>Due:</b> <input type="text" value="2016/10/14"/>	<b>Completed:</b> <input type="text" value="2016/09/15"/>	
<b>Rating:</b> <input type="text" value="Achieved"/>		
<b>Measures of Success</b> <input type="text" value="Measure of success for goal1"/>		

**Attach Feedback**  
**Add Past Goal**

3. (Optional) Type a detailed description in the box under the goal **Title**.
4. (Optional) Type a comment in the box **Outcome**.
5. Enter the date when the goal was achieved in the box **Completed**.







6. Select the goal **Rating**.
7. (Optional) Type a **Measure of Success**.
8. (Optional) Click on **Add Past Goal** and redo steps 2 to 7 if you need to add a goal that has not been entered in the Goal setting form or in the **My Performance** tab.
9. (Optional) Type a note in the **Assessment** box of the **Planning** competency.

	Assessment	Rating Scale	Score:
<b>Planning</b> Organize in time a series of actions or events in order to achieve an objective or a project. Plan and organize own work and priorities in regular daily activities.		Meets the Competency ▼	3
<b>Initiative</b> Demonstrate creativity and initiative to suggest improvements and encourage positive results. Be proactive and self-starting. Show availability and willingness to go above and beyond expectations whenever possible.		Meets the Competency ▼	3
<b>Service Excellence</b> Reflect a positive attitude, demonstrate competence and professionalism, treat members of the community with respect, exercise care, devote full attention and find solutions. (Visit the section "Useful links" on the home page to read the detailed definition)		Meets the Competency ▼	3
<b>Teamwork and cooperation</b> Cooperate and work well with other members of the team to reach common goal. Accept and give constructive feedback. Adjust own behaviour to reach team goals.		Meets the Competency ▼	3

10. Using the **Rating Scale** scroll list, select the achieved level of the **Planning** competency.
11. (Optional) Type a note in the **Assessment** box of the **Initiative** competency.

12. Using the **Rating Scale** scroll list, select the achieved level of the **Initiative** competency.
13. (Optional) Type a note in the **Assessment** box of the **Client service orientation** competency.
14. Using the **Rating Scale** scroll list, select the achieved level of the **Client service orientation** competency.
15. (Optional) Type a note in the **Assessment** box of the **Teamwork and cooperation** competency.
16. Using the **Rating Scale** scroll list, select the achieved level of the **Teamwork and cooperation** competency.
17. (Optional) Type a **Development Progress Review** in the box.

**DEVELOPMENT PLAN PROGRESS REVIEW**

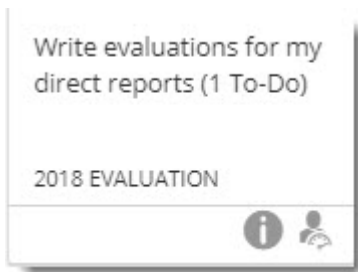
2016 Development Plan	Progress
<p><b>Title:</b> <input type="text"/></p> <p> </p> <p><b>Competency:</b> None Available</p> <p> <a href="#">Attach Feedback</a></p> <p> <a href="#">Add Past Development Plan</a></p>	<div></div>

18. (Optional) Type a detailed description in the box under **Title**.
19. (Optional) Type a comment in the **Progress** box.
20. (Optional) Type a comment related to your performance in the **Employee's Comments** box (you can also wait to enter your comment when you give your final approval to the appraisal).
21. Click on **Save Draft** to save your form (especially if you still want to modify it later before submitting it to your supervisor).
22. Click on **Submit** when you are ready to send your form to your supervisor.


23. Click on **OK** to confirm that you no longer need to modify the form.

## Revision of the self-appraisal by the supervisor





1. Once the self-appraisal form has been submitted by the employee, it is assigned to the supervisor.
2. This step is started on the Home tab by clicking on **Write evaluations for my direct reports**.



3. The supervisor clicks on **Edit Form** to begin the step.

Employee Name ▲	Task
Jeff Bonneville	 <a href="#">Edit Form</a>

4. The form displays what was written by the employee in shaded areas titled **Self-Evaluation**. The supervisor can add content in the boxes under the shaded areas.

2016 Goal	Outcome	Score
Self- Title: Goal 1 Evaluation: SMART description of goal 1		3 / 3
Title:		3
 		/3
Due:	2016/10/11 	Completed: 2016/09/13 
Rating:	Achieved ▼	
Measures of Success		
Self-Evaluation: Measure of success for goal1		

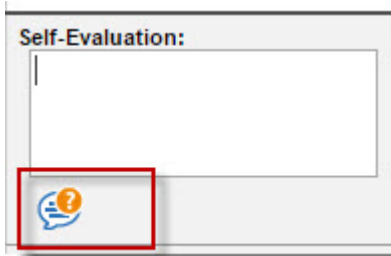
5. The score entered by the employee for each goal is also displayed in the **Self-Evaluation** shaded area. The supervisor must select the level of achievement using the **Rating** drop-down list of the **Goal** section.

The screenshot displays the '2016 Goal' form. At the top, there are columns for '2016 Goal', 'Outcome', and 'Score'. The 'Self-Evaluation' section is highlighted with a red border and contains the following text: 'Self- Title: Goal 1', 'Evaluation: SMART description of goal 1', and 'Outcome of goal 1'. A callout bubble labeled 'score given by employee' points to the 'Score' column, which shows '3 / 3'. Below this, there is a 'Title:' field, a large text area for the 'SMART description of goal 1', and a 'Due:' date field set to '2016/10/11'. A callout bubble labeled 'score given by the supervisor' points to a 'Score' field showing '3 / 3'. Below the text area, there is a 'Rating:' dropdown menu set to 'Achieved'. At the bottom, there is a 'Completed:' date field set to '2016/09/13'. The 'Measures of Success' section is highlighted with a red border and contains the text 'Self-Evaluation: Measure of success for goal1'.

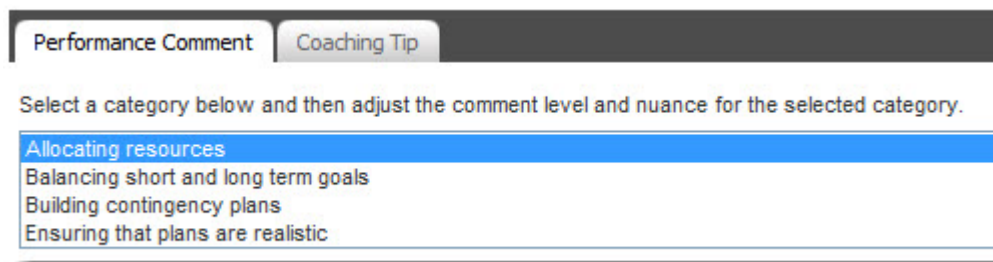
6. The supervisor can enter comments for each key competency in the boxes located under the word **Self:**. If the employee has added a note in **Area of focus** on the Goal setting form, it will be displayed beside the word **Self:**.

The screenshot shows the 'Self:' section of the form. It contains a text area for entering a comment, with the text 'This is a test to enter a a comment in a specific competency.' A callout bubble labeled 'Suggested Comments' points to a button labeled 'Suggested Comments'.

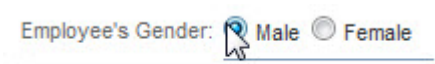
7. The supervisor can get a list of suggested comments to insert in the key competencies section by clicking on **Suggested Comments**. The following steps explains how to get a list of suggested comments.



- a. Select the category of comment that applies to the employee's position in relation to the competency.



- b. Select the employee's gender.



- c. Select the achieved level by the employee.



- d. Adjust the nuance by sliding the scale bar in order to display the various comments that can be inserted. By sliding the scale bar to the right, you will notice that the suggested comment get more elaborate and more positive.



8. The system displays both the score given by the employee and by the supervisor.

Competency	Assessment to areas of Setting Form	Refer Goal	Rating Scale	Employee Score:	Supervisor Score:
<b>Planning</b> Organize in time a series of actions or events in order to achieve an objective or a project. Plan and organize own work and priorities in regular daily activities.	<b>Self:</b> <div></div> Suggested		<div>Meets the Competency</div>	3	3

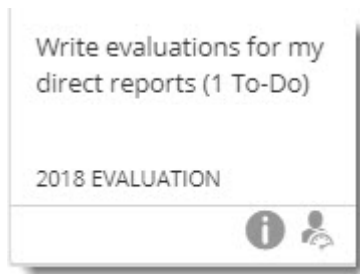
9. The system displays the development plan entered by the employee in the **Self:** shaded area but the supervisor can add a plan and/or a comment in the appropriate boxes under the **Self:** section if the employee has not entered one.

2012 Development Plan	Progress
<b>Self:</b> Title: Technical writing training Take a two-days training on technical writing to improve the quality of my user manuals.	The training was completed in July and I have already started integrated what I have learned and my user manual definitely look more professional.
<b>Title:</b> Technical writing training Take a two-days training on technical writing to improve the quality of my user manuals.	The training was completed in July and I have already started integrated what I have learned and my user manual definitely look more professional.

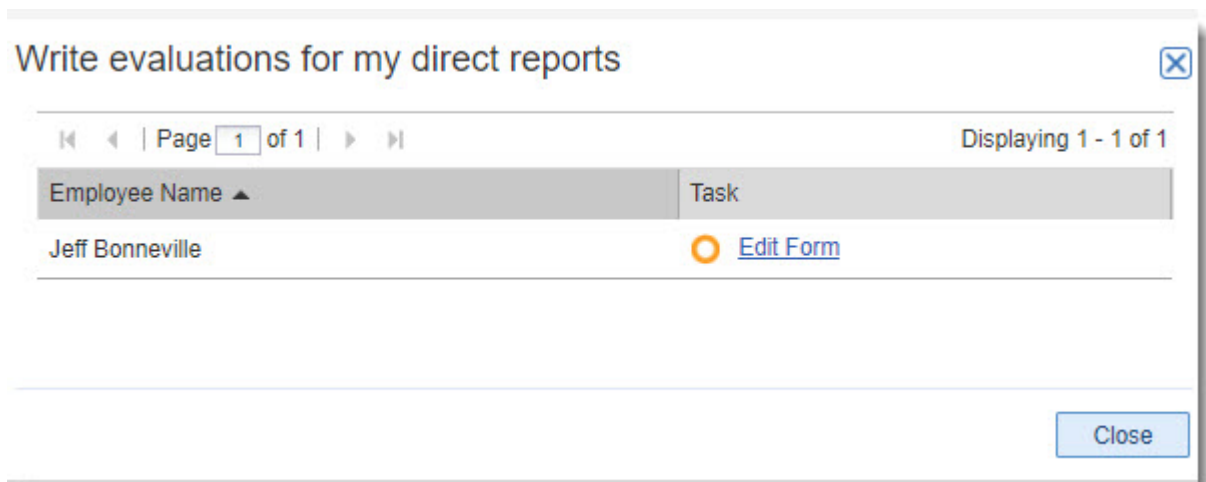
## Steps to review of the self-appraisal form by the supervisor

As a supervisor, you must review and finalize the self-appraisal that your subordinates have submitted.

1. Click on [Write evaluations for my direct reports](#).



2. Click on [Edit Form](#).





3. (Optional) Type or modify the goal **Title** .

2016 Goal	Outcome	Score
<b>Self- Title: Goal 1</b> <b>Evaluation: SMART description of goal 1</b>	Outcome of goal 1	<div>score given by employee</div> 3 / 3
<b>Title:</b> <input type="text"/> <div> <div> <div></div> <div></div> </div> <div> <div></div> <div></div> </div> </div>	<div>score given by the supervisor</div> <input type="text"/>	<input type="text"/> 3 /3
<b>Due:</b> <input type="text" value="2016/10/11"/>	<b>Completed:</b> <input type="text" value="2016/09/13"/>	
<b>Rating:</b> <input type="text" value="Achieved"/>		
<b>Measures of Success</b> <div> <div>Self-Evaluation: Measure of success for goal1</div> <div></div> </div>		

4. (Optional) Type or modify the goal description.
5. (Optional) Enter the goal **Due** date.
6. (Optional) Enter the goal achievement date in the **Completed** box.
7. Select the goal achievement level using the **Rating** drop-down list.
8. (Optional) Type or modify the **Measures of success** .
9. (Optional) Click on **Add past goal** if you need to add a goal that was not entered in the self-appraisal form filled by the employee.
10. (Optional) Type a comment related to the **Planning** competency.

11. Select the **Planning** competency level of achievement using the **Ratings Scale** drop-down list.

Competency	Assessment to areas of Setting Form	Rating Scale	Employee Score:	Supervisor Score:
<b>Planning</b> Organize in time a series of actions or events in order to achieve an objective or a project. Plan and organize own work and priorities in regular daily activities.	Self: <input type="text"/> Suggested:	Meets the Competency	3	3

12. (Optional) Type a comment related to the **Initiative** competency.
13. Select the **Initiative** competency level of achievement using the **Rating Scale** drop-down list.
14. (Optional) Type a comment related to the **Client service orientation** competency.
15. Select the **Client service orientation** competency level of achievement using the **Rating Scale** drop-down list.
16. (Optional) Type a comment related to the **Teamwork and cooperation** competency.
17. Select the **Teamwork and cooperation** competency level of achievement using the **Rating Scale** drop-down list.
18. (Optional) Type or modify the **Development Plan Title**.
19. (Optional) Type or modify the **Development Plan** description.
20. (Optional) Type or modify a comment in the **Progress** box.
21. (Optional) Type a comment in the **Supervisor's Comment** box.
22. Click on **Yes** or **No** to indicate whether you have consulted the second level supervisor on this evaluation.
23. Type the **Date of consultation** if you have consulted the second level supervisor.
24. Click on **Save Draft** to save your form (especially if you need to modify it before sending the form back to your employee).

25. Click on **Submit** when you are ready to send the form to your employee for approval.
26. Click on **OK** to confirm that you do not need to modify the form.

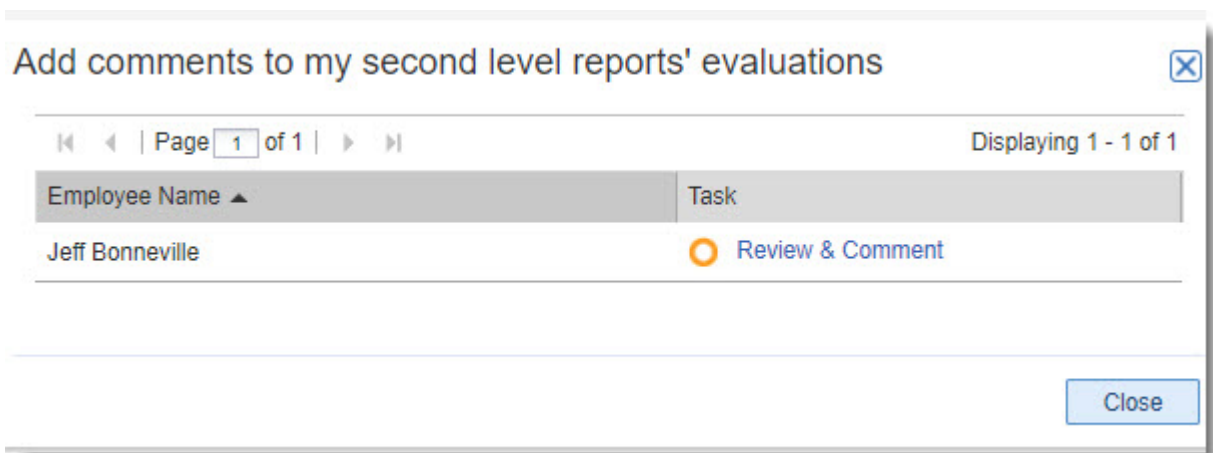
## Second level supervisor's approval

The second level supervisor can add comments in the form. If the second level supervisor has forms to approve, they will appear on the home page in the section Tasks.

1. Click on **Add comments to my second level reports evaluations**.



2. Click **Review and Comment**.



3. (Optionall) Enter a comment in the **Second Level Supervisor** box.

**COMMENTS SECTION**

**2nd Level Supervisor:**

4. Click **Save Change** .
5. Click **Submit** .
6. Click **OK** .

## Supervisor's sign off

1. Click **Sign-off evaluations for my direct reports** .

Sign-off evaluations for  
my direct reports (1 To-  
Do)

2018 EVALUATION - TESTING

2. Click **Comment and Sign Off**.

Tasks

Page 1 of 1

First Name	Last Name	Sign-off evaluations for my direct reports
Jean-François	Deguire	<input checked="" type="radio"/> View
Julie	Plouffe	<input type="radio"/> Michel Fournier
Lynne	Bouchard	<input type="radio"/> Michel Fournier
Suzanne	Falardeau	<input type="radio"/> <b>Comment &amp; Sign Off</b>

3. (Optionall) Enter or modify the comment in the **Immediate Supervisor's** box.

**COMMENTS SECTION**

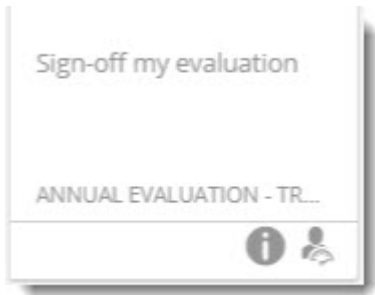
**2nd Level Supervisor:** Second Level Supervisor Comments

**Immediate Supervisor:** Supervisor's comments.

4. Click **Save Changes**.
5. Click **Sign Off**.

## Employee Evaluation Sign Off

1. Click **Sign-Off my evaluation**.



2. Click **Sign-Off**.
3. Click **X** to close the form.

# Performance Improvement Plan (P.I.P.)

## Performance Improvement Plan(P.I.P)

The performance improvement plan must be completed when the employee obtains **Needs Improvement** in at least one of the key competencies.

1. The process is not automatically assigned to each employee and supervisor, it is assigned upon request only when the need arises. The supervisor must send an email to the address [performance@uottawa.ca](mailto:performance@uottawa.ca) requesting that the P.I.P. process be assigned to himself/herself and to the concerned employee.
2. The P.I.P. is a process containing three steps.



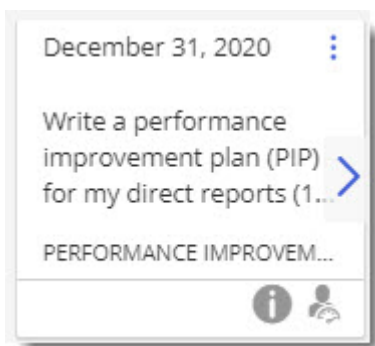
3. The three steps of the P.I.P. are:
  - a. The supervisor writes the P.I.P. and submits the form.
  - b. The employee signs off.
  - c. The supervisor signs off.

## Steps of the P. I. P.

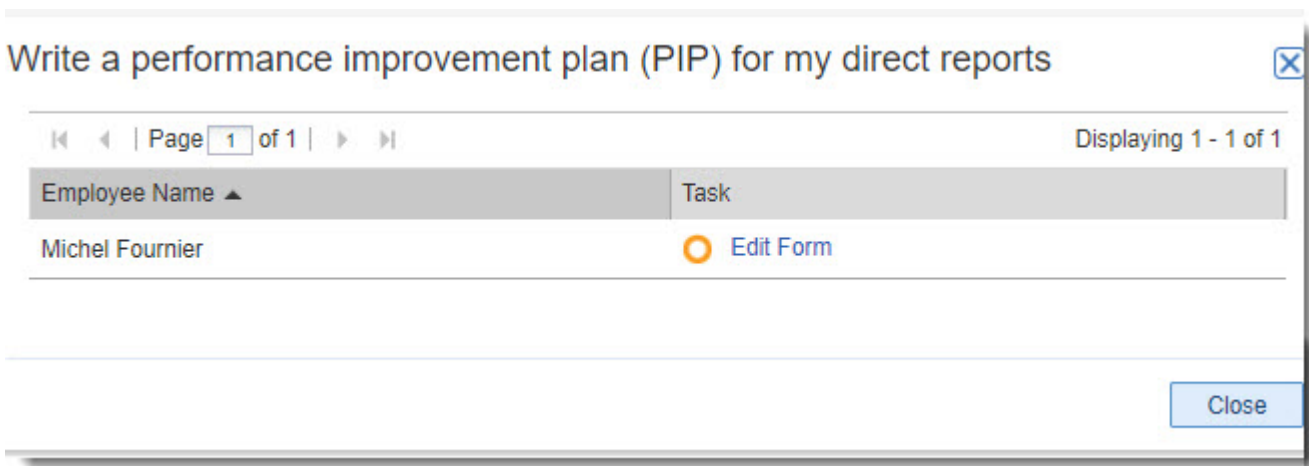
Some steps are completed by the supervisor, others are done by the employee and the process is completed when the form is signed electronically by the supervisor.


1.  **Note:** The following steps are completed by the supervisor.

Click on [Write a performance improvement plan \(PIP\) for my direct reports](#).



2. Click on [Edit Form](#).



Employee Name ▲	Task
Michel Fournier	 <a href="#">Edit Form</a>



3. Click on the competency name that needs improvement using the Form Navigator.

- Planning
- Initiative
- Client Service Orientation
- Teamwork and Cooperation

The employee might have to improve more than one competency.

4. Click on **Add Performance Improvement Plan**.

**Planning**

Organize in time a series of actions or events in order to achieve an objective or a project. Plan and organize own work and priorities in regular daily activities.


**Comments:** Patricia must submit reports each SM pay to a few clients. One of the reports that Patricia creates is sent to the Parking Office staff who must ensure that employees have paid the deductions for parking or bus (STO). The person responsible to verify those reports must have the reports before the pay is run to that corrections be done as soon as possible.

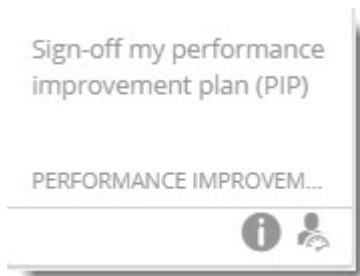
**Title:** Using the Outlook Tasks to schedule the production of reports. **Due:** 06/30/2013

I have met with Patricia about this matter and we have come to the conclusion that she will use the Tasks within Outlook to schedule the reports so that they are run on the same day that the Payroll Verification Reports are available. Patricia and I will meet in two months to see the evolution and improvement of the report production.

**Add Performance Improvement Plan**

5. Describe the situation demonstrating that the employee must improve the competency in the **Comments** box.
6. Type a brief description of the performance improvement plan in the box **Title**.
7. Type a detailed description of the improvement plan in the box under the **Title**.
8. Enter the Performance Improvement Plan due date in the **Due** field.
9. (Optional) Click on **Add Performance Improvement Plan** to add another plan, for example, you might suggest that the employee registers for a specific workshop on time management.

10. (Optional) Click on the competency that needs to be improved using the Form Navigator.
    - Planning
    - Initiative
    - Client Service Orientation
    - Teamwork and Cooperation
  11. Click on **Save Changes**.
  12. Click on **Submit** when the form is complete and ready to be sent to the concerned employee.
  13. Close the form by clicking on the red X situated on the right side of the form's heading.
  14.  **Note:** The next steps are completed by the employee who needs to sign off his/her P.I.P.
- Click on **Sign-off my performance improvement plan (PIP)**.



15. Read the comments added by the supervisor in each competency that need to be improved.

### Improvement required

#### Planning

Organize in time a series of actions or events in order to achieve an objective or a project. Plan and organize own work and priorities in regular daily activities.

**Comments:** Patricia must submit reports each SM pay to a few clients. One of the reports that Patricia creates is sent to the Parking Office staff who must ensure that employees have paid the deductions for parking or bus (STO). The person responsible to verify those reports must have the reports before the pay is run so that corrections be done as soon as possible.

**Title:** Using the Outlook Tasks to schedule the production of reports.

**Due:** 06/30/2013

I have met with Patricia about this matter and we have come to the conclusion that she will use the Tasks within Outlook to schedule the reports so that they are run on the same day that the Payroll Verification Reports are available. Patricia and I will meet in two months to see the evolution and improvement of the report production.

16. Enter the date when you have met with your supervisor to discuss the P.I.P. in the field **Date of discussion**

**Date of discussion:** 02/20/2013

I have met with my supervisor to discuss this performance improvement plan

☒ Yes  
☐ No

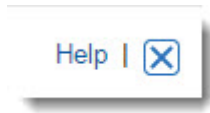
**Employee Comments:** I agree with Stéphane that I have to send my reports in time and that I will use the Outlook Tasks to manage my work in a timely manner.

17. Click sur **Yes** or **No** of the option **I have met with my supervisor to discuss this performance improvement plan**.
18. (Optional) Type a comment in the **Employee Comments** box.
19. Click on **Save Changes**.

20. Click on **Sign Off** .

The system will display the task as a completed status.

21. Click on the X to close the form.



# Probation

## Beginning of Probation Period

The probation process is started by writing the probationary goals. The supervisor must meet his employee to discuss the goals that need to be achieved by the end of the probation, the job requirements and key competencies.

The probation process contains two steps.

1. The supervisor meets the employee to establish the goals during the probation period and to discuss the job requirements and the key competencies on which the employee will be evaluated.
2. The employee signs the goals for the probationary period.

Set goals for  
probationary  
employees

Employee signs off  
probationary goals

## Goal Setting Form

The probation goal setting form is used to establish the goals on which the employee will be evaluated at the end of the probationary period.

The form is divided in many sections.

1. Employee Identification If the information displayed in this section contains errors, they must be reported by email at the address [performance@uottawa.ca](mailto:performance@uottawa.ca) <sup>2</sup>
2. Training Sessions Required by Law  
All employees working at the University of Ottawa are required to follow specific trainings that are considered mandatory by many levels of the Government.
3. Mandatory Training Sessions According to the University.  
Some training sessions are considered mandatory by the University. Some training sessions are specifically mandatory for new employees working at the University whereas, others are specifically mandatory to all employees.

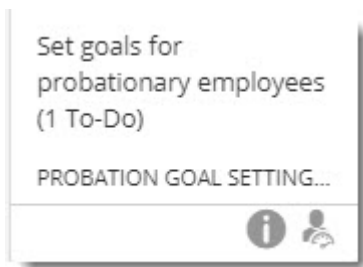
---

2. [performance@uottawa.ca](mailto:performance@uottawa.ca)

4. **Mandatory Training Sessions Based on the Position Type.**  
Some training sessions are mandatory and they based on the type of position held by the employee. The supervisor must establish the training sessions that the employee will need to take.
5. **Probationary goals**  
The supervisor must establish the SMART goals that the employee will need to have achieved by the end of the probationary period. He/she can enter up to five goals.
6. **Job Requirements and Key Competencies**  
The supervisor has the responsibility to discuss the job requirements during the probationary period and the key competencies on which the employee will be evaluated at the end of the probation period.

## Goal Setting


1. Click on **Set Goals for probationary employees** .



2. Click on **Edit Form**.

Set goals for probationary employees

Page 1 of 1 | Displaying 1 - 1 of 1

Employee Name ▲	Task
IrenaSept MarkovinoicSept	 Edit Form

Close

The form is displayed. The supervisor cannot register an employee to a training session, he/she will be able to register when he/she approves his/her probationary goal form.

3. Click on **Mandatory Training Sessions Based on the Position Type** from the Form Navigator.

4. Click on the option that identifies whether the training session is mandatory ( **R** ) or not required ( **NR** ) from the column titled **Identify required training** .

	Identify required training:
Respect in the Workplace	
Violence in the Workplace: Awareness	
Workplace Hazardous Materials Information	
Mandatory Training Sessions According to the University at a Glance	
Enhancing the University Experience	
Performance and Development (Optional)	
<b>Mandatory Training Sessions Based on the Position Type</b>	Required
Enhancing the University Experience	
Enhancing the University Experience	
Interaction Management (for positions)	
RF 101 - Introduction to financial reporting	

- a. (Optional) Add a **Comment** .

**Comments:**

5. Repeat the preceding steps for each training session displayed in the section **Mandatory Training Sessions Based on the Position Type** .
6. Click on **Probationary Goals** from the Form Navigator.



7. Type the **Title** of the Goal in the top box.

The screenshot shows a web interface for setting probationary goals. On the left is a navigation menu with various links. The 'Probationary Goals' link is highlighted with a red box, and a red arrow points from it to the main form area. The main form is titled 'Probationary Goals' and contains instructions: 'Goals are set at the beginning of the probationary period based on a discussion between th on this link to learn more about how to set S.M.A.R.T. goals.' Below this is a section titled 'Title and description / Goal action items' which contains three input fields: 'Title of the goal', 'Type a detailed description of the SMART goal.', and 'Measures of Success' (with the instruction 'Use this box to describe how you will be able to determine if the goal has been achieved.'). To the right of the description field is a 'Due:' field with the date '08/22/2013'. At the bottom left of the form is a blue icon and the text 'Add New Goal'.

Violence in the Workplace: Aware  
Workplace Hazardous Materials In  
Mandatory Training Sessions Accordin  
University at a Glance  
Enhancing the University Experienc  
Performance and Development (Ov  
Mandatory Training Sessions Based on  
Enhancing the University Experienc  
Enhancing the University Experienc  
Interaction Management (for positio  
RF 101 - Introduction to financial re  
**Probationary Goals**  
Job Requirements and Key Competenc  
Attendance and Time Management  
Job Skills and Quality of Work  
Interpersonal Skills, Teamwork and  
Client service orientation  
Planning  
Initiative

### Probationary Goals

Goals are set at the beginning of the probationary period based on a discussion between th on this link to learn more about how to set S.M.A.R.T. goals.

#### Title and description / Goal action items

Title of the goal

Type a detailed description of the SMART goal.

Due: 08/22/2013

Measures of Success  
Use this box to describe how you will be able to determine if the goal has been achieved.

Add New Goal

8. Type a detailed **Description** of the goal and a measure to achieve it, in the second box.
9. Click on the calendar icon of the **Due** field and select the probation end date.
10. Type a measure of success. The measure of success helps the supervisor and the employee determine if a goal has been achieved or not.
11. (Optional) Click on **Add New Goal** and repeat the preceding steps.  
You can add up to five goals.

12. Click on the Calendar icon of the **Date of discussion** field and select the date when you have met with your employee to discuss the trainings to take, the goals, job requirements and key competencies.

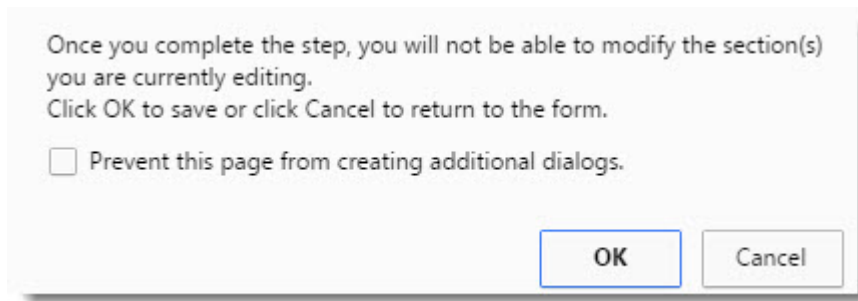
The screenshot shows a form with three sections. The first section, 'Date of discussion:', has a text input field containing '08/08/2013' and a calendar icon to its right. The second section, 'I have discussed these goals and requirements with the employee', has two radio buttons: 'Yes' (which is selected) and 'No'. The third section, 'Supervisor's Comments', has a text area with a placeholder text 'The supervisor can enter a comment in this box.'.

13. Click on the **I have discussed these goals and the requirements with the employee** option.
14. (Optional) Type a comment in the **Supervisor's comments** box.
15. Click on **Save Changes**.

The screenshot shows a dialog box with a white background. At the top right, there are two buttons: 'Help' in blue text and a blue 'X' icon. At the bottom, there are two buttons: 'Save Changes' with a blue floppy disk icon and 'Submit' with a green checkmark icon.

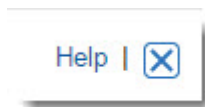
16. Click on **OK**.
17. Click on **Submit**.  
If you click on **Submit**, the form is saved and forwarded to the employee for his electronic signature. The form can no longer be modified once it has been submitted.

18. Click on **OK**.



You will not be able to modify the form once it has been submitted. The system will indicate that the step has a status of completed.

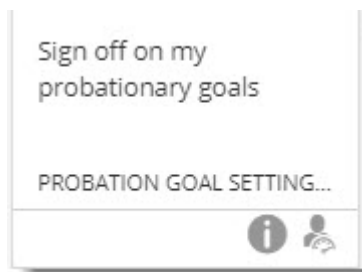
19. Click on the **X** to close the form.



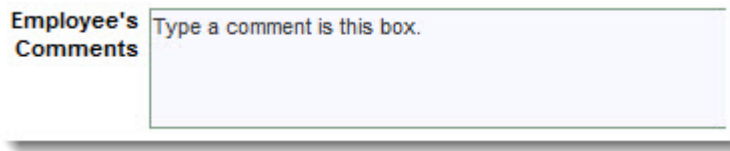
## Approval of probation goals

The supervisor has filled the form to establish the probationary goals, he/she submits the form to his employee in order for him/her to electronically sign it.

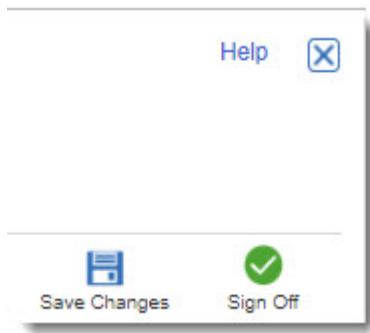
1. Click **Sign off on my probationary goals**.



2. (Optional) Type a comment in the **Employee's Comments** box.



3. Click **Save Changes**.



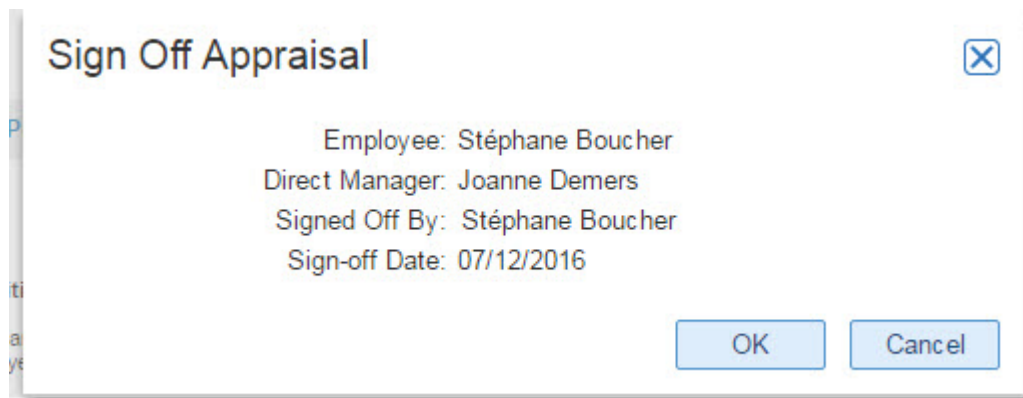
4. Click **OK**.

5. Click **Sign Off**.

If you click on Submit the form is saved and the process is completed. The form cannot be modified once it has been submitted.

6. Click **OK**.

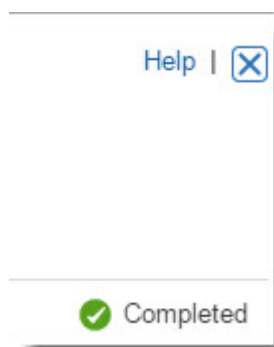
7. Click .



A dialog box titled "Sign Off Appraisal" with a close button (X) in the top right corner. The text inside the dialog box reads: "Employee: Stéphane Boucher", "Direct Manager: Joanne Demers", "Signed Off By: Stéphane Boucher", and "Sign-off Date: 07/12/2016". At the bottom right, there are two buttons: "OK" and "Cancel".

You cannot modify the form after you click on OK. The system will display the completed status.

8. Click on the  to close the form.



A small dialog box with a title bar containing "Help" and a close button (X). The main area is empty. At the bottom, there is a green checkmark icon followed by the text "Completed".

## End of probation period

The performance evaluation for employees on probation process completes the probation process.

The performance evaluation for probation has three steps.

End of probation -  
Write evaluation(s) for  
my direct rep...

End of probation -  
Employee sign-off

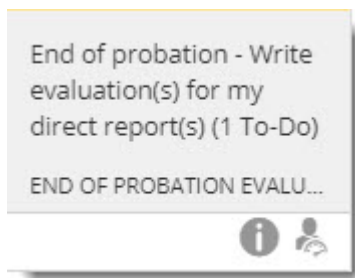
End of probation -  
Sign-off appraisals for  
second level ...

1. The supervisor writes the end of probation evaluation form.
2. The employee signs off the evaluation form.
3. The second-level supervisor signs off the form.

## End of probation form

The probationary goals are inserted automatically into the End of Probation Evaluation Form. The supervisor begins the process.


1. Click **End of probation - Write evaluation (s) for my direct reports.**



2. Click **Edit Form**.

End of probation - Write evaluation(s) for my direct report(s) ✕

Page 1 of 1 | Displaying 1 - 1 of 1

Employee Name ▲	Task
IrenaSept MarkovinovicSept	 Edit Form

Close

3. Click **Employee Identification** from the Form Navigator.

**Form Navigator**

Probationary Performance Evaluation  
**Employee Identification**  
Mandatory Training Sessions  
Accessibility Training  
Respect in the Workplace  
Violence in the Workplace: Awareness  
Workplace Hazardous Materials Information  
Enhancing the University Experience  
Enhancing the University Experience

**Employee Identification**

**Name:** Pierre Bercier **Supervisor Name:**

**Position Title:** Conseiller pédagogique/A **Faculty/Service:**

**Review Period:** From  To

4. Click on the calendar icon of the **Review Period From** and select the probation period begin date.
5. Click on the calendar of the **To** field and select the probation period end date.

6. Click **Mandatory Training Sessions** from the Form Navigator.

**Mandatory Training Sessions**

Please confirm if the employee completed all training sessions required based on his/her type of position.


	Training Completed:	Date:
<b>Accessibility Training</b> In accordance with the Accessibility for Ontarians with Disabilities Act 2005 (AODA), the University of Ottawa is required to provide training, to all employees, on accessibility standards for client services.	<input type="text" value="Yes"/>	<input type="text" value="08/12/2013"/>
<b>Respect in the Workplace</b> The Health and Safety legislation stipulates that all employees must be trained in the prevention of harassment in the workplace. The employee will learn what his/her individual responsibilities are to ensure that the workplace is exempt of harassment and discrimination, and how to report a disturbing situation or a complaint of harassment or discrimination.	<input type="text"/>	<input type="text"/>
<b>Violence in the Workplace: Awareness</b> The primary purpose of the Ontario Occupational Health and Safety Act is to protect workers from hazards in the workplace, including hazards involving workplace	<input type="text"/>	<input type="text"/>

7. Using the arrow from the column labeled Training Completed, select the option that indicates whether the employee has taken the training or not.  
You must do this for every training sessions displayed on the form.
8. Click on the calendar icon of the **Date** field and select the date when the training was taken.  
You must do this for every training sessions displayed on the form.



9. Click **Evaluation of Goals** from the Form Navigator.

The screenshot shows a web form titled 'Evaluation of Goals'. The form contains several fields, each highlighted with a red rectangular box. The fields are: 'Goal Title' with the text 'Title of first probationary goal'; 'Description' with the text 'Detailed description of probationary goal.'; 'Due:' with the date '08/12/2013'; 'Completed:' with the date '08/12/2013'; 'Rating:' with a dropdown menu showing 'Satisfactory'; and 'Measures of Success' with the text 'Measures of success'. At the bottom left, there is a button labeled 'Add Past Goal' with a gear icon.

10.  **Note:** The goals that were set using the Probation Goal Setting form were copied into the Evaluation of Goals section but you can still modify their content. All the fields under the section Evaluation of Goals can be modified.  
(Optional) Type a comment to demonstrate that the Goal has been achieved in the Outcome box.
11. Click on the calendar icon of the Completed field and select the date when the goal was achieved.
12. Chose one of three possible **Rating** : Satisfactory, Unsatisfactory and Not Applicable
13. Repeat the last three steps for the next goals.

14. Click **Add Past Goal** if you have omitted one or more goals when setting the goals.

The fields Goal Title and Description, Outcome, Due, Completed, Rating and Measure of success are displayed for you to fill.

The screenshot shows a web form for setting goals. It includes the following fields and labels:

- Goal Title and Description:** A large text area with a vertical scrollbar on the right. To its left are two small icons: a document with a plus sign and a document with a minus sign.
- Outcome:** A text field located to the right of the Description area.
- Due:** A date picker field with a calendar icon.
- Completed:** A date picker field with a calendar icon.
- Rating:** A dropdown menu with a downward arrow.
- Measures of Success:** A text area with a vertical scrollbar on the right, located below the Rating field.

15. Click on the **Evaluation of Job Requirements and Key Competencies** from the Form Navigator.

**Evaluation of Job Requirements and Key Competencies**

Please rate the employee's performance against job requirements and key competencies set period. Use the following rating scale to rate the employee's performance:

**Satisfactory:** Performance meets all expectations and requirements of the job.

**Unsatisfactory:** Performance does not meet expectations and requirements of the job. Signify the reasons for the unsatisfactory performance.

**Not Applicable:** Competency could not be evaluated during the probationary period.

	Rating:	Comments:
<b>Attendance and Time Management</b> Employee arrives regularly at work, on time and ready to contribute. Employee shows up for meetings well-prepared. Employee is keenly aware of the time frame in which tasks or projects need to be done. Employee accepts and mirrors the level of urgency conveyed by manager or customer being served. Employee puts first priority on the needs of the organization or the needs of its customers.	<div>Satisfactory Unsatisfactory Not Applicable</div>	

The system displays the job requirements and key competencies on which the employee must be evaluated at the end of the probationary period.

16. Bring the cursor on the first job requirement / competency that is displayed on the form.
17. Select the level using the **Rating** drop-down list for the job requirement or competency.

18. (Optional) Type a comment in the **Comments** box to justify the selected level.

**Evaluation of Job Requirements and Key Competencies**

Please rate the employee's performance against job requirements and key competencies set period. Use the following rating scale to rate the employee's performance:

**Satisfactory:** Performance meets all expectations and requirements of the job.

**Unsatisfactory:** Performance does not meet expectations and requirements of the job. Sign

**Not Applicable:** Competency could not be evaluated during the probationary period.

	Rating:	Comments:
<b>Attendance and Time Management</b> Employee arrives regularly at work, on time and ready to contribute. Employee shows up for meetings well-prepared. Employee is keenly aware of the time frame in which tasks or projects need to be done. Employee accepts and mirrors the level of urgency conveyed by manager or customer being served. Employee puts first priority on the needs of the organization or the needs of its customers.	<div> <div></div> <div> Satisfactory  Unsatisfactory  Not Applicable </div> </div>	

19. Repeat the last two steps for each of the job requirements and competencies displayed on the form.
20. Click on **Recommendation** from the Form Navigator.

21. Select one of the three options to indicate the result of the probationary period.

- Confirmation of employment
- Extension of probationary period (upto 3 months)
- End of employment

**Recommendation**

Based on the evaluation above, please indicate your recommendation. Should you select 'Extension of probationary period', please contact your Labour Relations Advisor. A written notice you must submit prior to the end of the probationary period.

☐ Confirmation of employment

☐ Extension of probationary period (up to 3months)

☐ End of employment

**Reasons for extending probation:**

[+ Corrective Action Plan](#)

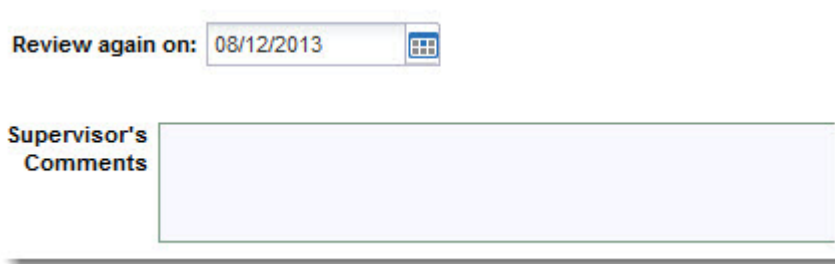
22. (Optional) Type a comment in the box **Reason for extending the probation** if you have selected to extend the probation at the previous step.

23. (Optional) Click on the **Corrective Action Plan** if you have decided to extend the probationary period.
- Type the **Title** of the measure to adopt to correct the problem.
  - Click on the calendar icon of the Due date and select the date when the corrective measure must have begun.
  - Type a detailed description of the corrective measure to adopt to correct the problem in the box under the title.



The screenshot shows a web form for creating a Corrective Action Plan. At the top right is a red-bordered 'Delete' button. Below it is a 'Title' label followed by a text input field. To the right of the title field is a 'Due:' label followed by a date input field containing '08/12/2013' and a small calendar icon. Below these fields is a large, empty text area for the description. At the bottom left of the form is a button labeled 'Corrective Action Plan' with a blue plus icon in a square.

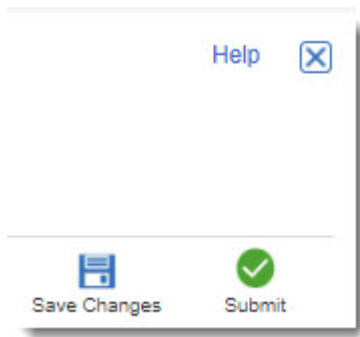
24. (Optional) Click **Corrective Action Plan** if you need to add more than one.
25. (Optional) Click **Delete** to remove a corrective action plan.
26. (Optional) Click on the calendar icon **Review again on** and select the date if you have decided to extend de probationary period.



The screenshot shows two fields from the form. The top field is labeled 'Review again on:' and contains the date '08/12/2013' next to a small calendar icon. Below this is a field labeled 'Supervisor's Comments' which is followed by a large, empty text area for entering comments.

27. (Optional) Type a comment in the **Supervisor's Comments**.

28. Click on **Save Draft** .



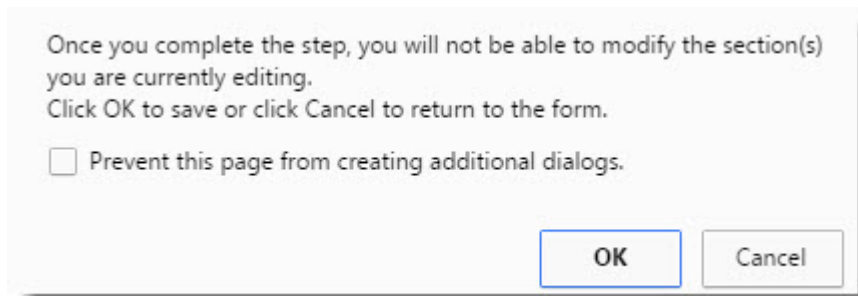
29. Click **OK** .

30. Click **Submit**.

If you click on Submit the form is saved and the process is completed. The form cannot be modified once it has been submitted.

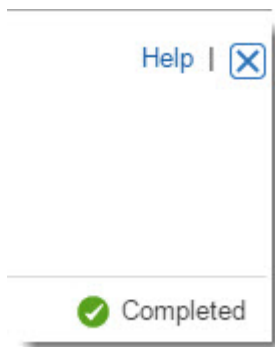
31. Click **OK** .

32. Click **Ok** .



You cannot modify the form after you click on OK. The system will display the completed status.

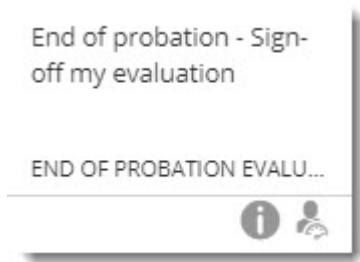
33. Click on the **X** to close the form.



## Signature of the End of Probation Evaluation Form

The second step of the end of probation process must be completed by the employee. This step is necessary because it enables the employee to electronically sign the end of probation form and to add a comment.

1. Click **End of probation - Sign-off my evaluation**.

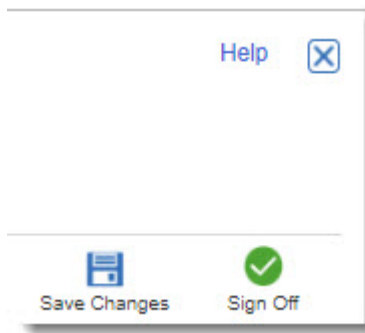


2. (Optional) Type a comment in **Employee's Comments**.

<b>Employee's Comments</b>	Type a comment in this box.
--------------------------------	-----------------------------



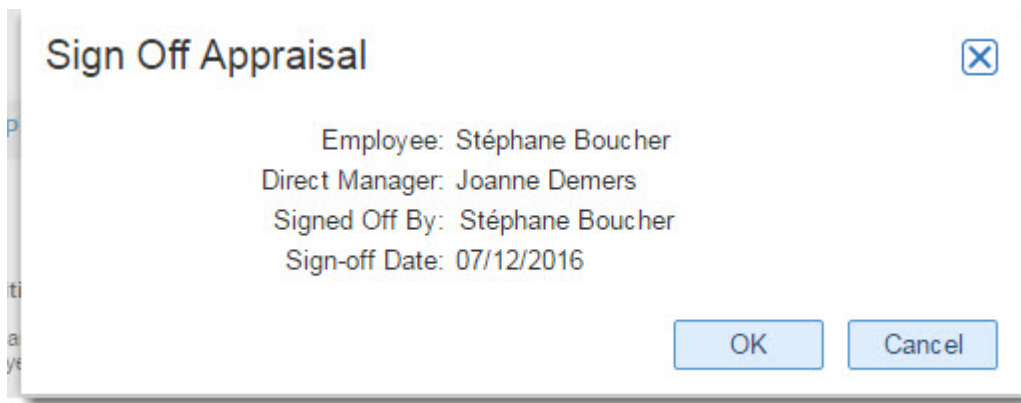
3. Click **Save Changes**.



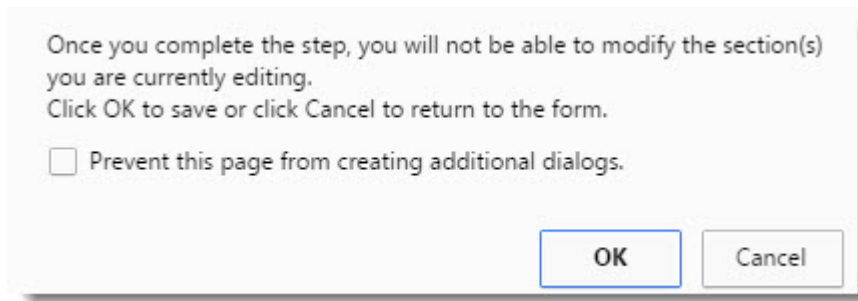
4. Click **OK**.
5. Click **Sign Off**.

If you click on Sign Off the form is saved and the process is completed. You cannot modify the form once it has been signed off.

6. Click **OK**.

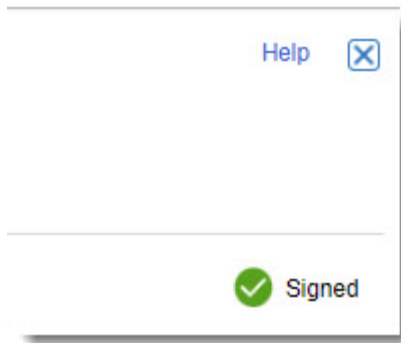


7. Click **OK**.



The system will the task with a signed status.

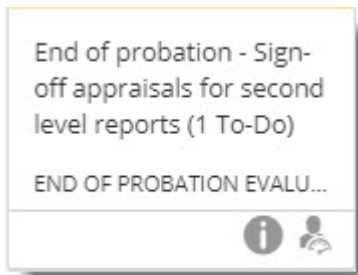
8. Click on the **X** to close the form.



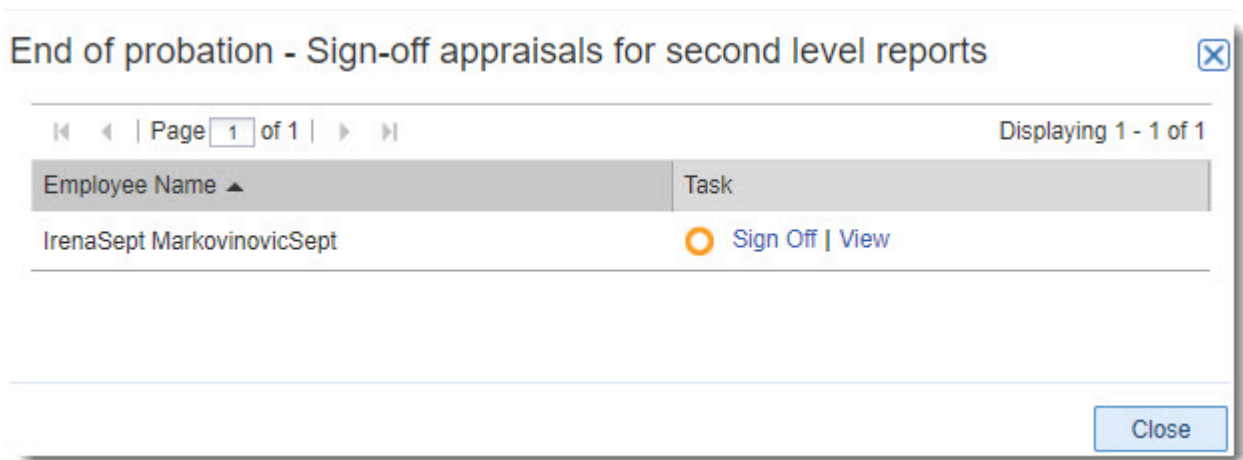
## Second Level Supervisor Approval

The second level supervisor must sign off the form to complete the end of probation process. At this point, no modifications can be made to the form. The second level supervisor can only review the content and sign off.

1. Click **End of probation - Sign-off appraisals for second level reports**.



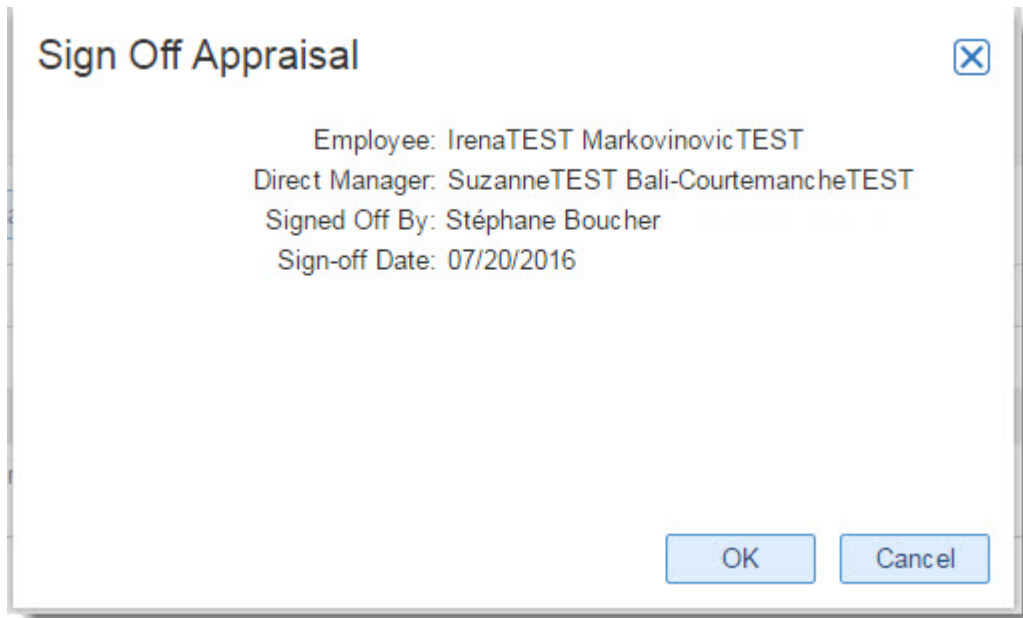
2. Click **View**.



If you click on **Sign Off**, the system will ask you to sign off without reviewing the content of the form.

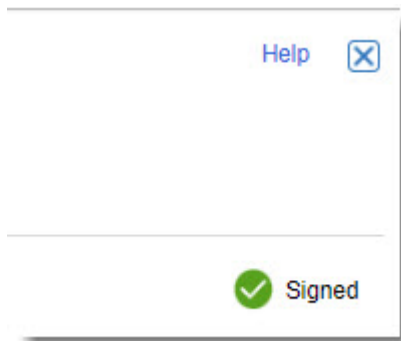
3. Click **Sign Off**.

4. Click .



The system will display the task as a signed status.

























































5. Click  to close the form.



# Halogen Reports

## About reports

Halogen can generate a variety of reports. The employee's user type determines which reports they can generate.

Reports		
Page 1 of 1		
	Title	Actions
 	<b>Score Report</b> Provides details related to the score for employees within one or multiple ...	   
 	<b>Goal Report</b> Provides insight into the status of individual goals.	   
 	<b>Status Report</b> Provides details related to the progress of employees and steps within one ...	   
 	<b>Certification</b> Identifies the status of your employees' certification.	  
 	<b>Competency Rating</b> Provides individual competency appraisal scores for your employees.	  
 	<b>Development Plan Report</b> Provides insight into the status of development plans.	   
 	<b>Employee Development History</b> Provides historical competency score and training effectiveness data for ea...	  
 	<b>Feedback Report</b> Provides details on all feedback and recognition sent and received through ...	   
 	<b>Score</b> Provides individual competency scores or an overall appraisal score for you...	  
 	<b>Training</b> Provides details related to results for a learning unit or units including ...	   

The **Job Description Assignment** report is not usable at the moment.

## Score

Provides details related to the score for employees within one or multiple Performance processes.

Home My Performance My Employees Task Status **Reports**

Search Title or Description Search Show All

Reports

Page 1 of 1

	Title ▲	Actions
+	<b>Competency Rating</b> Provides individual competency appraisal scores for your employees.	[Open Report] [View] [Star]
+	<b>Development Plan Report</b> Provides insight into the status of development plans.	[Play] [Edit] [View] [Star]
+	<b>Employee Development History</b> Provides historical competency score and training effectiveness data for ea...	[Open Report] [View] [Star]
+	<b>Évaluation 2014 Status Report</b> Provides details related to the progress of employees and steps within one ...	[Play] [Edit] [Close] [Star]
+	<b>Feedback Report</b> Provides details on all feedback and recognition sent and received through ...	[Play] [Edit] [View] [Star]
+	<b>Goal Report</b> Provides insight into the status of individual goals.	[Play] [Edit] [View] [Star]
+	<b>Job Description Assignment</b> Provides information about job descriptions assigned to your employees.	[Open Report] [View] [Star]
+	<b>Score</b> Provides individual competency scores or an overall appraisal score for you...	[Open Report] [View] [Star]
+	<b>Score Report</b> Provides details related to the score for employees within one or multiple ...	[Play] [Edit] [View] [Star]
+	<b>Status Report</b> Provides details related to the progress of employees and steps within one ...	[Play] [Edit] [View] [Star]

1. Click **Reports**.
2. Click **Open Report** icon of the **Score** report.

3. Results can be filtered to meet reporting needs.

**Score** Options

Process: All

Form: All

Competency: Overall Score:

Overall Score: All

Include Incomplete Results: No

Employees: ☒ Direct Reports  
☐ All Reports

Total Employees: 7

Generate Report

Direct Reports 07/13/2016

**Scores** Export

- **Process** : select the specific process from the drop-down list to view the corresponding scores.
  - **Form** : select the form from the drop-down list to view the corresponding scores.
  - **Competency** : select the specific competency from the drop-down list to view the corresponding score.
  - **Overall Score** : select one of the operators from the drop-down list (greater than, less than, etc.) and then choose a value that appears in the field on the right. This will filter results to include those that meet the overall score parameters you entered.
  - **Include Incomplete Results** : select « 1 »Yes« 2 » or « 1 »No« 2 » to include or exclude incomplete results.
  - **Employees** : to view results for only those employees who report directly to you, select Direct Reports.
4. Click **Generate Report** .



5. Click **Export** to export in Excel.
6. The report opens in Excel.

Direct Reports	Employee	Supervisor	Overall Score:	Action
	Boileau Micheline	Pagé, Daniel	3.0	View Appraisal
	Laframboise, Marc	Pagé, Daniel	4.0	View Appraisal
	Dufresne, Denise	Pagé, Daniel	4.0	View Appraisal
	Rinfret, Martin	Pagé, Daniel	3.0	View Appraisal
	Sauriol, Lucienne	Pagé, Daniel	3.0	View Appraisal
	<b>Average</b>		<b>3.4</b>	

## Score Report

Provides details related to the score for employees within one or multiple Performance processes.

1. Click **Reports**.

Home My Performance My Employees Task Status **Reports**

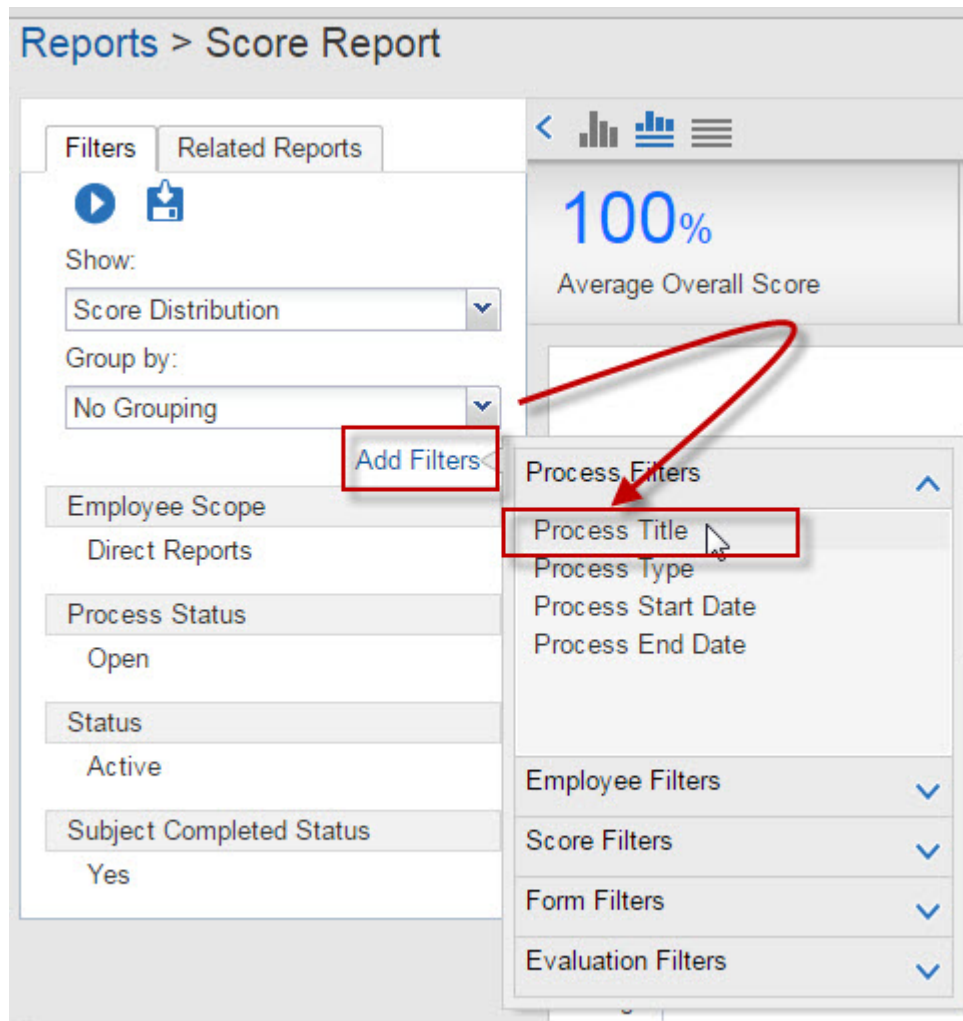
Search Title or Description Search Show All

### Reports

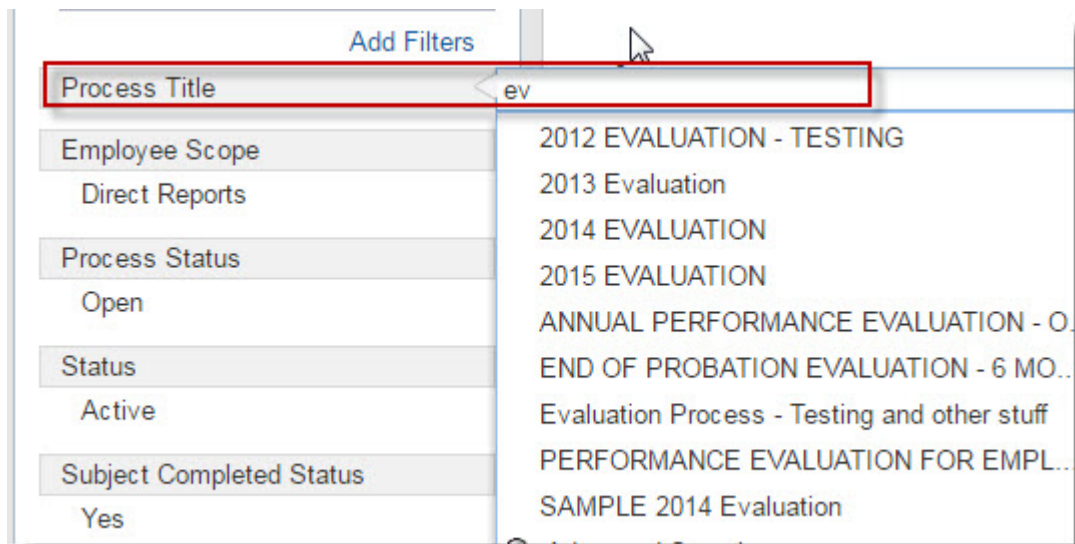
Page 1 of 1

	Title ▲	Actions
+	<b>Competency Rating</b> Provides individual competency appraisal scores for your employees.	
+	<b>Development Plan Report</b> Provides insight into the status of development plans.	
+	<b>Employee Development History</b> Provides historical competency score and training effectiveness data for ea...	
+	<b>Évaluation 2014 Status Report</b> Provides details related to the progress of employees and steps within one ...	
+	<b>Feedback Report</b> Provides details on all feedback and recognition sent and received through ...	
+	<b>Goal Report</b> Provides insight into the status of individual goals.	
+	<b>Job Description Assignment</b> Provides information about job descriptions assigned to your employees.	
+	<b>Score</b> Provides individual competency scores or an overall appraisal score for you...	
+	<b>Score Report</b> Provides details related to the score for employees within one or multiple ...	
+	<b>Status Report</b> Provides details related to the progress of employees and steps within one ...	

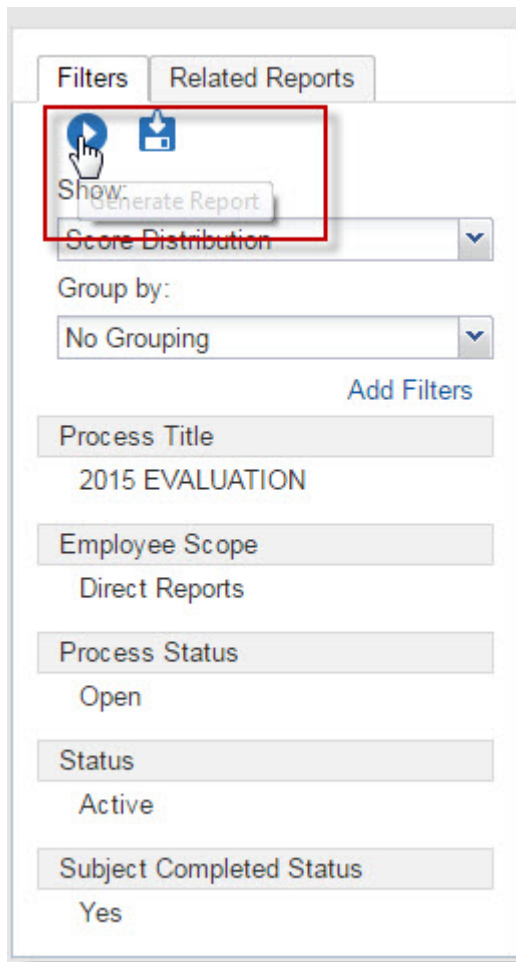
2. Click **Generate report** in the **Actions** column of the **Score Report** .  
The report is displayed in a new window.
3. Click **Add filters** and click on **Process Title** .



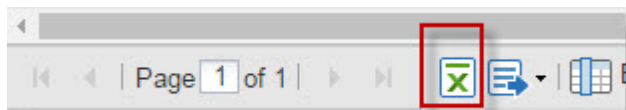
4. Type the first few letters of the `process` and click on the process name in the drop-down list.



5. Click **Generate Report** icon (the report will be run using the selected processes).



6. Click on the Export to Microsoft Excel icon.



7. The report opens in Excel.

Overall Score	Subject Name	Evaluator Name	Process Title
4.000	Boileau Micheline	Pagé, Daniel	2014 Evaluation
4.000	Laframboise, Marc	Pagé, Daniel	2014 Evaluation
3.000	Dufresne, Denise	Pagé, Daniel	2014 Evaluation
3.000	Rinfret, Martin	Pagé, Daniel	2014 Evaluation
3.000	Sauriol, Lucienne	Pagé, Daniel	2014 Evaluation

## Feedback Report

This report provides details on all feedback and recognition sent and received through the year.

1. Click **Reports**.

Home My Performance My Employees Task Status **Reports**

Search Title or Description Search Show All

Reports

Page 1 of 1

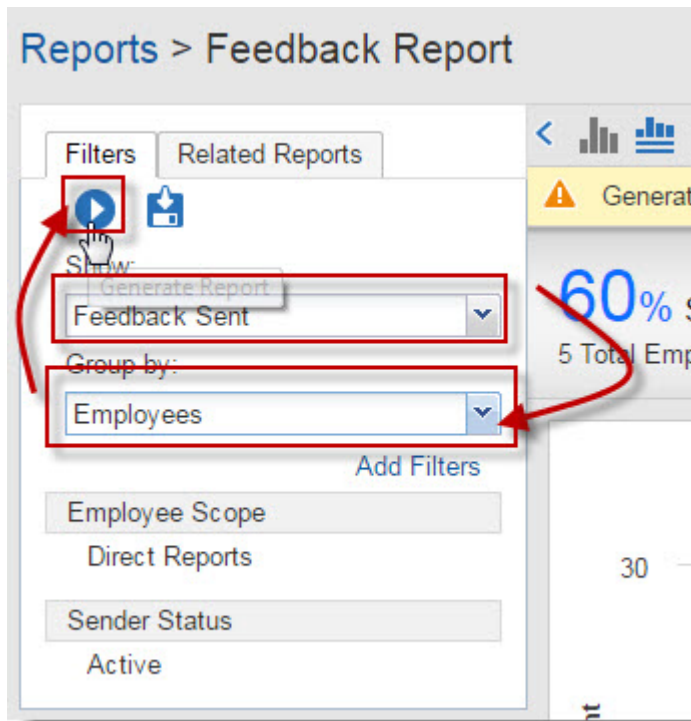
	Title ▲	Actions
+ [Bar Chart]	Competency Rating Provides individual competency appraisal scores for your employees.	[Document] [Eye] [Star]
+ [Bar Chart]	Development Plan Report Provides insight into the status of development plans.	[Play] [Pencil] [Eye] [Star]
+ [Bar Chart]	Employee Development History Provides historical competency score and training effectiveness data for ea...	[Document] [Eye] [Star]
+ [Bar Chart]	Évaluation 2014 Status Report Provides details related to the progress of employees and steps within one ...	[Play] [Pencil] [X] [Star]
+ [Bar Chart]	Feedback Report Provides details on all feedback and recognition sent and received through ...	[Play] [Pencil] [Eye] [Star]
+ [Bar Chart]	Goal Report Provides insight into the status of individual goals.	[Play] [Pencil] [Eye] [Star]
+ [Bar Chart]	Job Description Assignment Provides information about job descriptions assigned to your employees.	[Document] [Eye] [Star]
+ [Bar Chart]	Score Provides individual competency scores or an overall appraisal score for you...	[Document] [Eye] [Star]
+ [Bar Chart]	Score Report Provides details related to the score for employees within one or multiple ...	[Play] [Pencil] [Eye] [Star]
+ [Bar Chart]	Status Report Provides details related to the progress of employees and steps within one ...	[Play] [Pencil] [Eye] [Star]

Open Report

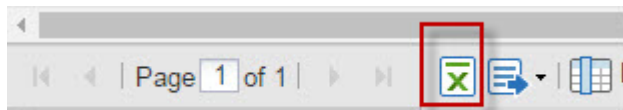
Generate Report



2. Click **Generate report** in the **Actions** column of the **Feedback Report** .  
The report is displayed in a new window.
3. Select **Feedback Sent** .



4. Select **Employees** .
5. Click **Generate Report** .
6. Click sur the Export to Excel icon.





7. The report opens in Excel.

Feedback Type	Sender Name	Recipient Name	Feedback Title	Feedback Description	Feedback Sent /Received Date
Manager Note	Courtemanche, Chantal	St-François, Diane	Journal Note		03/19/2012
Journal Note	Bercier, Pierre	Bercier, Pierre	Courriel du professeur M. Quelquechose	Copier lbouchar@uottawa.ca	03/09/2015
Journal Note	Bercier, Pierre	Bercier, Pierre	Courriel envoyé par untel	contenu du courriel icilbouchar@uottawa.ca	03/09/2015
Journal Note	Bercier, Pierre	Bercier, Pierre	Nice email from Mr Something	copy and paste the email here	12/01/2015
Journal	Deschamps,	Deschamps,	k,nlkjkjg		02/05/2013
Journal	Deschamps,	Deschamps,	un titre significatif	^09uipiok	02/26/2013

## Generating a competency rating report

Provides individual competency appraisal scores for your employees.

1. Click on **Reports**.

The screenshot shows the 'Reports' section of a management system. The top navigation bar includes 'Home', 'My Performance', 'My Employees', 'Task Status', and 'Reports' (highlighted with a red box). Below the navigation bar is a search area with a text input 'Search Title or Description', a 'Search' button, and a 'Show All' button. The main content area is titled 'Reports' and shows a table of reports. The table has columns for 'Title' and 'Actions'. The first report is 'Competency Rating', which provides individual competency appraisal scores for employees. A red box highlights the 'Actions' column for this report, and a red arrow points from the 'Reports' button in the navigation bar to this box. A callout box labeled 'Open Report' points to the first icon in the 'Actions' column. Another callout box labeled 'Generate Report' points to the second icon in the 'Actions' column. The table lists several other reports, including 'Development Plan Report', 'Employee Development History', 'Évaluation 2014 Status Report', 'Feedback Report', 'Goal Report', 'Job Description Assignment', 'Score', 'Score Report', and 'Status Report'.

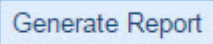
	Title ▲	Actions
+ [Bar Chart]	<b>Competency Rating</b> Provides individual competency appraisal scores for your employees.	[Icon] [Eye] [Star]
+ [Bar Chart]	<b>Development Plan Report</b> Provides insight into the status of development plans.	[Play] [Pencil] [Eye] [Star]
+ [Bar Chart]	<b>Employee Development History</b> Provides historical competency score and training effectiveness data for ea...	[Icon] [Eye] [Star]
+ [Person]	<b>Évaluation 2014 Status Report</b> Provides details related to the progress of employees and steps within one ...	[Play] [Pencil] [X] [Star]
+ [Bar Chart]	<b>Feedback Report</b> Provides details on all feedback and recognition sent and received through ...	[Play] [Pencil] [Eye] [Star]
+ [Bar Chart]	<b>Goal Report</b> Provides insight into the status of individual goals.	[Play] [Pencil] [Eye] [Star]
+ [Bar Chart]	<b>Job Description Assignment</b> Provides information about job descriptions assigned to your employees.	[Icon] [Eye] [Star]
+ [Bar Chart]	<b>Score</b> Provides individual competency scores or an overall appraisal score for you...	[Icon] [Eye] [Star]
+ [Bar Chart]	<b>Score Report</b> Provides details related to the score for employees within one or multiple ...	[Play] [Pencil] [Eye] [Star]
+ [Bar Chart]	<b>Status Report</b> Provides details related to the progress of employees and steps within one ...	[Play] [Pencil] [Eye] [Star]

- Click on the **Open Report** icon of the **Competency Rating** report.  
The Competency Rating report is displayed in a new window.
- Results can be filtered to meet reporting needs.

The screenshot shows the 'Competency Rating' report window. At the top, the title 'Competency Rating' is in a dark header. Below it, the 'Process' dropdown is set to '2012 EVALUATION - TESTING'. The 'Employees' section has two radio buttons: 'Direct Reports' (selected) and 'All Reports'. The 'Filter By' dropdown is set to 'No Filter', followed by an equals sign and another dropdown set to 'None'. On the left, under 'Select Competencies:', there is a list of 'Available Competencies' with 'All' highlighted. A red box is around 'All', and a red arrow points from the 'Process' dropdown to it. Another red arrow points from 'All' to the 'Add >' button. Below the list are 'Add >' and '< Remove' buttons. On the right, under 'Selected Competencies:', a list of competencies is shown: 'Client service orientation', 'Initiative', 'Planification', 'Planning', 'Service à la clientèle', 'Teamwork and cooperation', and 'Travail d'équipe et coopération'.

- Employees** : to view direct results for only those employees who report directly to you, select **Direct Reports** ; to view results for all employees you are responsible for, select **All Reports** .
- Filter by** : select the desired parameters (Position Title, Position Number, Faculty or Service, etc.). Click **Select** to choose a value for the filter from the list, then click **OK** .
- Select Competencies** : click from the available competencies or click **All** then click **Add** .

4. Click **Generate Report**.

A rectangular button with a blue border and the text "Generate Report" in blue.

5. Click on **Export**.

A rectangular button with a blue border and the text "Export" in blue.

6. Click **OK**.

7. The report opens in Excel.

Competency	No of Responses	On Time	Lowest	-	-	Highest	N/A
Employee Count	1	100.0%	-	-	-	-	-
Client service orientation	1	100.0%	-	-	100.0%	-	-
Initiative	1	100.0%	-	-	-	100.0%	-
Planning	1	100.0%	-	-	100.0%	-	-
Teamwork and cooperation	1	100.0%	-	-	-	100.0%	-

## Generating a goals report

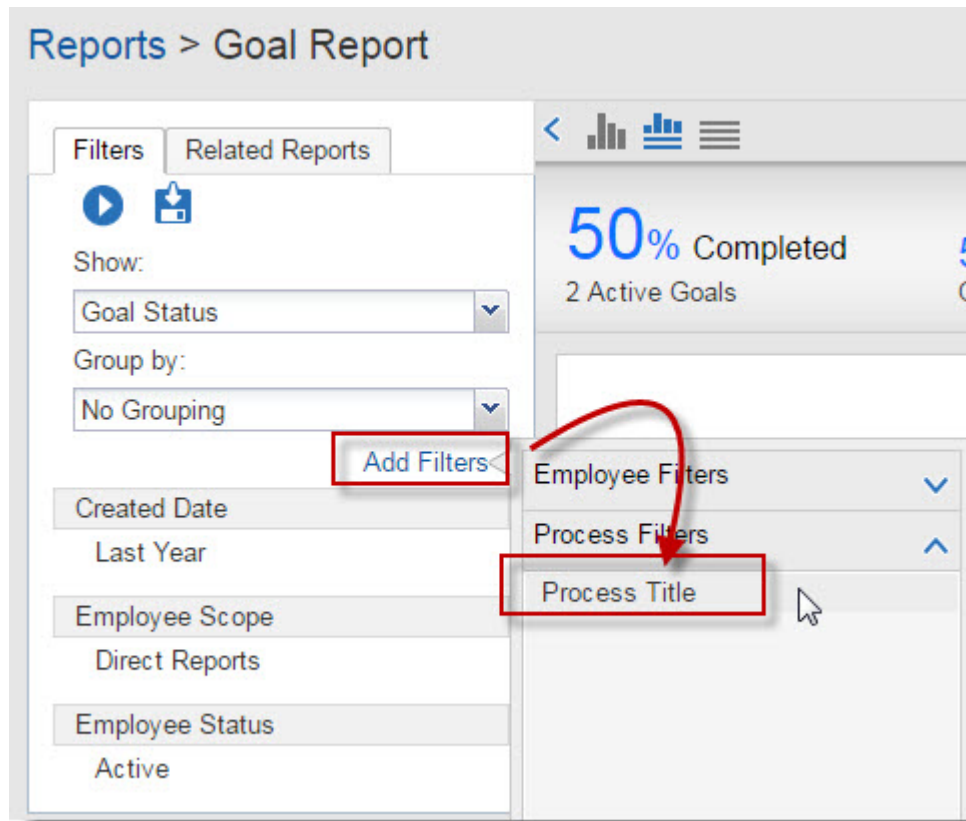
Provides insight into the status of individual goals.

1. Click **Reports**.

The screenshot shows the University of Ottawa system interface. The top navigation bar includes links for Home, My Performance, My Employees, Task Status, and Reports. The Reports link is highlighted with a red box. Below the navigation bar is a search bar with the text "Search Title or Description" and buttons for Search and Show All. The main content area is titled "Reports" and shows a list of reports. The list has columns for Title and Actions. The first report is "Competency Rating" with the description "Provides individual competency appraisal scores for your employees." The second report is "Development Plan Report" with the description "Provides insight into the status of development plans." The third report is "Employee Development History" with the description "Provides historical competency score and training effectiveness data for ea...". The fourth report is "Évaluation 2014 Status Report" with the description "Provides details related to the progress of employees and steps within one ...". The fifth report is "Feedback Report" with the description "Provides details on all feedback and recognition sent and received through ...". The sixth report is "Goal Report" with the description "Provides insight into the status of individual goals." The seventh report is "Job Description Assignment" with the description "Provides information about job descriptions assigned to your employees." The eighth report is "Score" with the description "Provides individual competency scores or an overall appraisal score for you...". The ninth report is "Score Report" with the description "Provides details related to the score for employees within one or multiple ...". The tenth report is "Status Report" with the description "Provides details related to the progress of employees and steps within one ...". A red box highlights the Reports tab and the Actions column. A callout box labeled "Open Report" points to the first report. Another callout box labeled "Generate Report" points to the Generate Report button in the Actions column for the Goal Report.

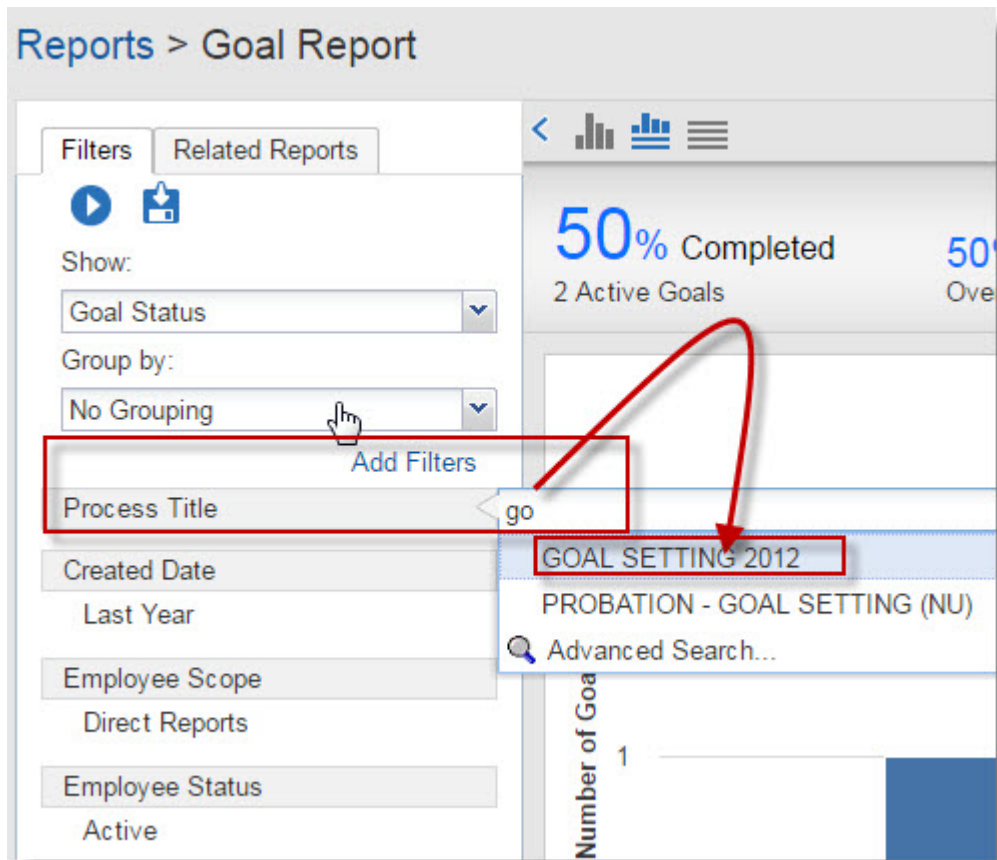
	Title ▲	Actions
+ [Bar Chart]	Competency Rating Provides individual competency appraisal scores for your employees.	[Icon] [Eye] [Star]
+ [Bar Chart]	Development Plan Report Provides insight into the status of development plans.	[Play] [Pencil] [Eye] [Star]
+ [Bar Chart]	Employee Development History Provides historical competency score and training effectiveness data for ea...	[Icon] [Eye] [Star]
+ [Person]	Évaluation 2014 Status Report Provides details related to the progress of employees and steps within one ...	[Play] [Pencil] [X] [Star]
+ [Bar Chart]	Feedback Report Provides details on all feedback and recognition sent and received through ...	[Play] [Pencil] [Eye] [Star]
+ [Bar Chart]	Goal Report Provides insight into the status of individual goals.	[Play] [Pencil] [Eye] [Star]
+ [Bar Chart]	Job Description Assignment Provides information about job descriptions assigned to your employees.	[Icon] [Eye] [Star]
+ [Bar Chart]	Score Provides individual competency scores or an overall appraisal score for you...	[Icon] [Eye] [Star]
+ [Bar Chart]	Score Report Provides details related to the score for employees within one or multiple ...	[Play] [Pencil] [Eye] [Star]
+ [Bar Chart]	Status Report Provides details related to the progress of employees and steps within one ...	[Play] [Pencil] [Eye] [Star]

2. Click **Generate Report** of the **Goals** report.  
The Goals report is displayed in a new window.
3. Click **Add filters** and click on **Process Title**.

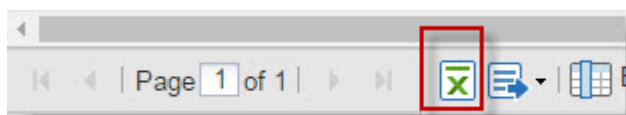




4. Type the first few letters of the process  and click on the process name in the drop-down list.



5. Click on the Export to Excel icon.



6. Click .

7. The report will be produced as an Excel document.

Goal Status	Employee Name	Goal Title	Due Date	Completed Date	Progress Flag
Completed	Bercier, Pierre	New goal in dec 2015		12/18/2015	On Track
In Progress	Deschamps, Patricia	nouveau titre pour obj 2015	12/18/2015		On Track



## Generating a development plan report

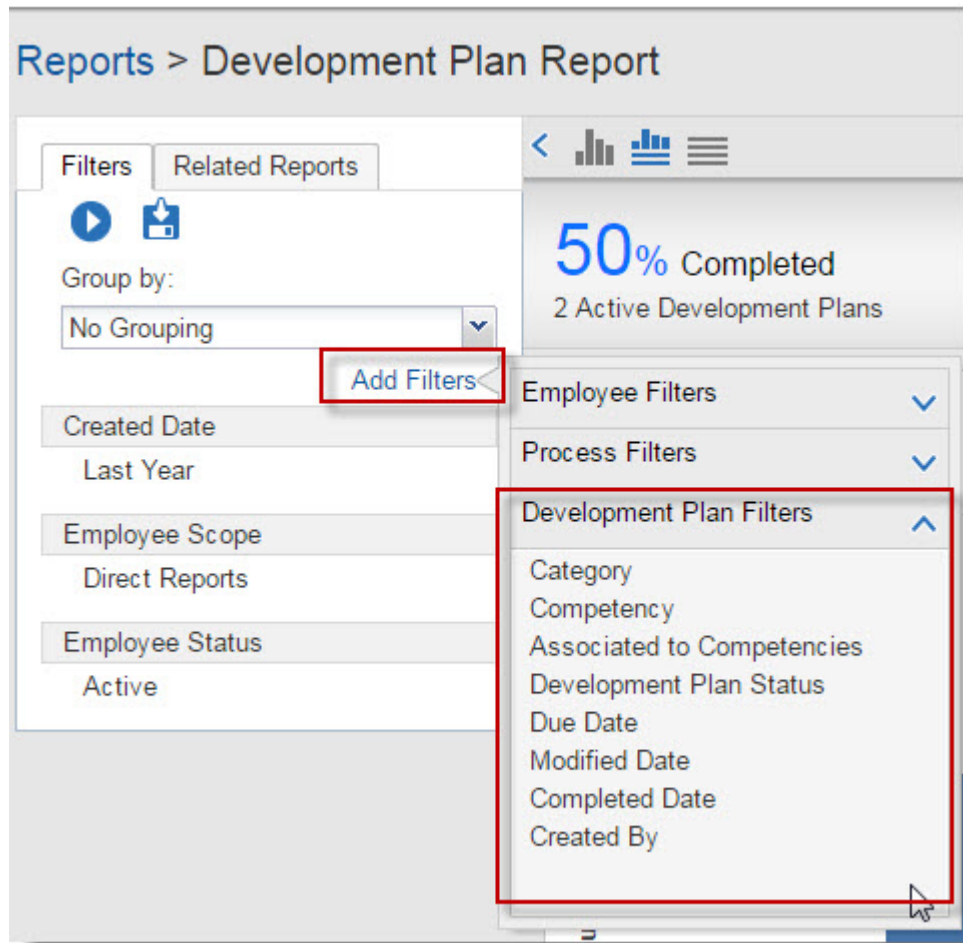
A development plan report shows a list of development plans for the supervisor's employees. The report shows the different elements of the plan (title, category, status, etc.).

1. Click **Reports**.

The screenshot shows the University of Ottawa HR system interface. The top navigation bar includes links for Home, My Performance, My Employees, Task Status, and Reports. The Reports link is highlighted with a red box. Below the navigation bar is a search bar with the text 'Search Title or Description' and buttons for Search and Show All. The main content area is titled 'Reports' and shows a list of reports. The list has columns for Title and Actions. The first report is 'Competency Rating' with a description 'Provides individual competency appraisal scores for your employees.' The second report is 'Development Plan Report' with a description 'Provides insight into the status of development plans.' The third report is 'Employee Development History' with a description 'Provides historical competency score and training effectiveness data for ea...'. The fourth report is 'Évaluation 2014 Status Report' with a description 'Provides details related to the progress of employees and steps within one ...'. The fifth report is 'Feedback Report' with a description 'Provides details on all feedback and recognition sent and received through ...'. The sixth report is 'Goal Report' with a description 'Provides insight into the status of individual goals.' The seventh report is 'Job Description Assignment' with a description 'Provides information about job descriptions assigned to your employees.' The eighth report is 'Score' with a description 'Provides individual competency scores or an overall appraisal score for you...'. The ninth report is 'Score Report' with a description 'Provides details related to the score for employees within one or multiple ...'. The tenth report is 'Status Report' with a description 'Provides details related to the progress of employees and steps within one ...'. A red box highlights the 'Reports' tab and the 'Actions' column of the report list. A blue callout box labeled 'Open Report' points to the first report, 'Competency Rating'. Another blue callout box labeled 'Generate Report' points to the 'Development Plan Report'.

	Title ▲	Actions
+	<b>Competency Rating</b> Provides individual competency appraisal scores for your employees.	[Icon: Document with checkmark] [Icon: Eye] [Icon: Star]
+	<b>Development Plan Report</b> Provides insight into the status of development plans.	[Icon: Play button] [Icon: Pencil] [Icon: Eye] [Icon: Star]
+	<b>Employee Development History</b> Provides historical competency score and training effectiveness data for ea...	[Icon: Document with checkmark] [Icon: Eye] [Icon: Star]
+	<b>Évaluation 2014 Status Report</b> Provides details related to the progress of employees and steps within one ...	[Icon: Play button] [Icon: Pencil] [Icon: X] [Icon: Star]
+	<b>Feedback Report</b> Provides details on all feedback and recognition sent and received through ...	[Icon: Play button] [Icon: Pencil] [Icon: Eye] [Icon: Star]
+	<b>Goal Report</b> Provides insight into the status of individual goals.	[Icon: Play button] [Icon: Pencil] [Icon: Eye] [Icon: Star]
+	<b>Job Description Assignment</b> Provides information about job descriptions assigned to your employees.	[Icon: Document with checkmark] [Icon: Eye] [Icon: Star]
+	<b>Score</b> Provides individual competency scores or an overall appraisal score for you...	[Icon: Document with checkmark] [Icon: Eye] [Icon: Star]
+	<b>Score Report</b> Provides details related to the score for employees within one or multiple ...	[Icon: Play button] [Icon: Pencil] [Icon: Eye] [Icon: Star]
+	<b>Status Report</b> Provides details related to the progress of employees and steps within one ...	[Icon: Play button] [Icon: Pencil] [Icon: Eye] [Icon: Star]

2. Click **Development Plan**.  
The development plan report is displayed in a new window.
3. Results can be filtered to meet reporting needs.



- **Process** : select the specific process from the drop-down list to view the development plan
- **Status** : select a status from the drop-down list.
- **Related Competency** : select a competency.
- **Category** : select a category from the drop-down list.
- **Employees** : to view results for only those employees who report directly to you, select Direct Reports; to view results for all employees you are responsible for, select All Reports.

4. Click  .



5. Click  .
6. The report will be produced as an Excel document.

Status	Employee Name	Title	Competency Title	Due Date	Completed Date
Completed	Bercier, Pierre	new dev plan 2015	Planning		12/04/2015
Not Started	Ely, Peter	ajou plan de dev	Planification		

## Generating an employee development history report

This report shows employees competency scores over time. If a learning activity or any professional development is associated with a competency, the supervisor can use the report to assess the effectiveness of the activity.

1. Click **Reports**.

The screenshot displays the 'Reports' section of a software interface. At the top, there is a navigation bar with tabs: 'Home', 'My Performance', 'My Employees', 'Task Status', and 'Reports'. The 'Reports' tab is highlighted with a red box. Below the navigation bar, there is a search bar with the placeholder text 'Search Title or Description' and two buttons: 'Search' and 'Show All'. The main content area is titled 'Reports' and shows a table of reports. The table has columns for 'Title' and 'Actions'. The 'Title' column lists various reports, each with a plus icon and a bar chart icon. The 'Actions' column contains icons for opening, editing, and deleting reports. A red arrow points from the 'Reports' tab to the 'Actions' column. A blue callout box labeled 'Open Report' points to the first report, 'Competency Rating'. Another blue callout box labeled 'Generate Report' points to the 'Employee Development History' report.

	Title ▲	Actions
+ [Bar Chart]	Competency Rating Provides individual competency appraisal scores for your employees.	[Icon] [Eye] [Star]
+ [Bar Chart]	Development Plan Report Provides insight into the status of development plans.	[Play] [Pencil] [Eye] [Star]
+ [Bar Chart]	Employee Development History Provides historical competency score and training effectiveness data for ea...	[Icon] [Eye] [Star]
+ [Person]	Évaluation 2014 Status Report Provides details related to the progress of employees and steps within one ...	[Play] [Pencil] [X] [Star]
+ [Bar Chart]	Feedback Report Provides details on all feedback and recognition sent and received through ...	[Play] [Pencil] [Eye] [Star]
+ [Bar Chart]	Goal Report Provides insight into the status of individual goals.	[Play] [Pencil] [Eye] [Star]
+ [Bar Chart]	Job Description Assignment Provides information about job descriptions assigned to your employees.	[Icon] [Eye] [Star]
+ [Bar Chart]	Score Provides individual competency scores or an overall appraisal score for you...	[Icon] [Eye] [Star]
+ [Bar Chart]	Score Report Provides details related to the score for employees within one or multiple ...	[Play] [Pencil] [Eye] [Star]
+ [Bar Chart]	Status Report Provides details related to the progress of employees and steps within one ...	[Play] [Pencil] [Eye] [Star]

2. Click **Employee Development History** report.

The Employee Development History report is displayed in a new window.

3. Results can be filtered to meet reporting needs:

**Employee Development History**

**Step 1: Select an employee**

Find and select an employee as the subject of the report.

Employees: ☐ Direct Reports ☒ All Reports

First Name:   
Last Name:

Filter by:

Group:

**Step 2: Select processes**

Select processes to use in the report. Add between 1 and 20 processes.

Include: ☐ Projects ☐ Archived

Available Processes:

Selected Processes:

**Step 3: Select employee data**

Select column to include in the report.

<input checked="" type="checkbox"/> Employee Name	<input checked="" type="checkbox"/> Job Title	<input type="checkbox"/> Division
<input checked="" type="checkbox"/> Manager Name	<input type="checkbox"/> Job Code	<input type="checkbox"/> Company
<input type="checkbox"/> HR Rep Name	<input checked="" type="checkbox"/> Hire Date	<input type="checkbox"/> Location
<input type="checkbox"/> Coach Name	<input type="checkbox"/> Work Group	
<input type="checkbox"/> Employee ID	<input checked="" type="checkbox"/> Department	

- Enter the employee's first and last names where indicated.

4. Click **Generate Report**.

**Generate Report**


5. Click **Print Preview** or **Export to PDF**.

**Employee Development History - 07/13/2016**
**Print View**
**Export to PDF**

**Employee Information**




Employee Name:	Pierre Bercier	Manager Name:	Stéphane Boucher
Job Title:	Conseiller pédagogique/Academic Advisor	Hire Date:	01/01/2013
Department:	RH/HR		

**GOAL SETTING FOR EMPLOYEES ON PROBATION - TESTING**

 Completed Date: 07/12/2016

**Competencies**

Competency	Score (5.0)	% Ch
Enhancing the University Experience: My Role Matters (for positions without front line customer service)	5.0	N/A
Enhancing the University Experience: The Supervisor's Role (for positions with supervisory responsibilities)	5.0	N/A
Interaction Management (for positions level 9 and up)	5.0	N/A
RF 101 - Introduction to financial resources	5.0	N/A

 Improved
  Declined
  No C



## Generating the Status Report

This report provides details related to the progress of employees and steps within one process.

1. Click **Reports**.

Home My Performance My Employees Task Status **Reports**

Search Title or Description Search Show All

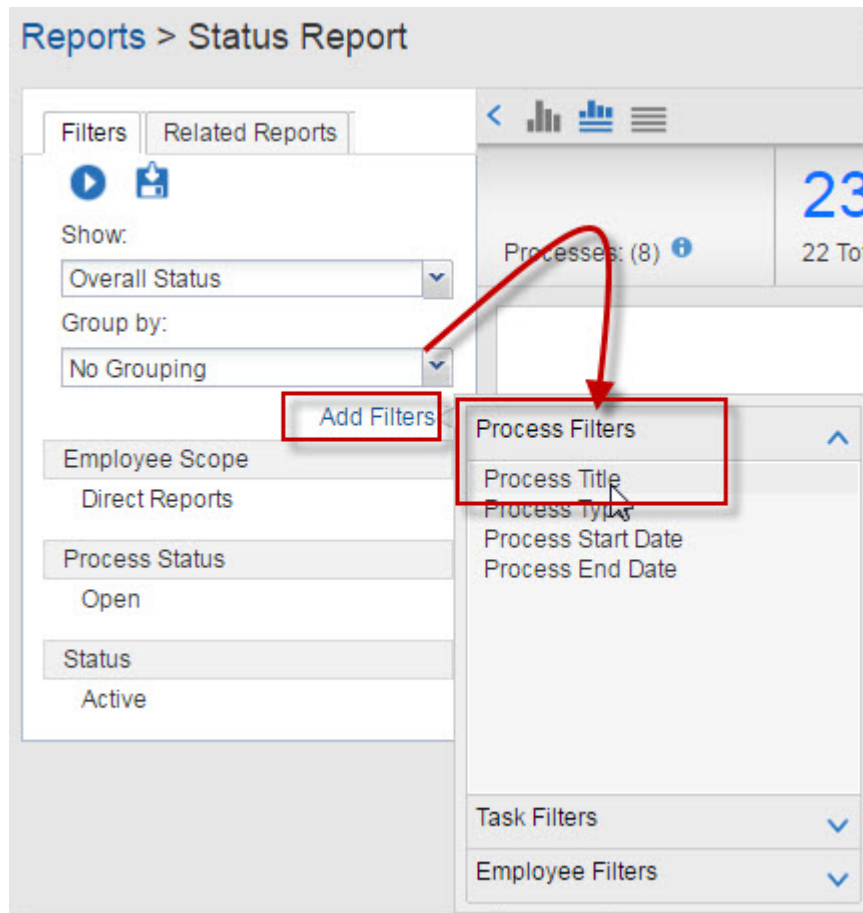
Reports

Page 1 of 1

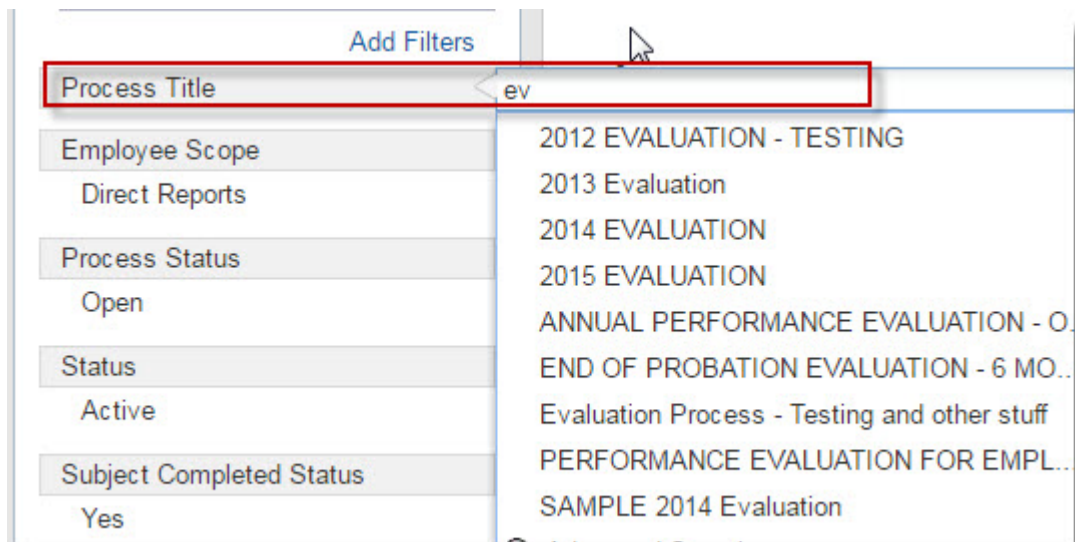
	Title ▲	Actions
+	Competency Rating Provides individual competency appraisal scores for your employees.	
+	Development Plan Report Provides insight into the status of development plans.	
+	Employee Development History Provides historical competency score and training effectiveness data for ea...	
+	Évaluation 2014 Status Report Provides details related to the progress of employees and steps within one ...	
+	Feedback Report Provides details on all feedback and recognition sent and received through ...	
+	Goal Report Provides insight into the status of individual goals.	
+	Job Description Assignment Provides information about job descriptions assigned to your employees.	
+	Score Provides individual competency scores or an overall appraisal score for you...	
+	Score Report Provides details related to the score for employees within one or multiple ...	
+	Status Report Provides details related to the progress of employees and steps within one ...	



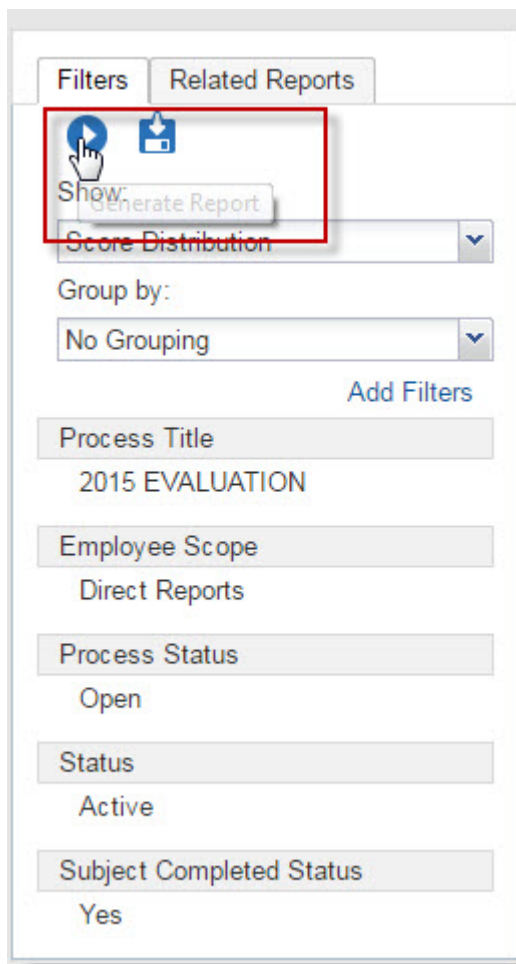
2. Click **Generate report** in the **Actions** column of the **Status Report** .  
The report is displayed in a new window.
3. Click **Add filters** and click on **Process Title** .



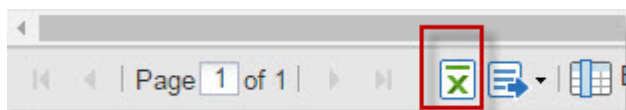
4. Type the first few letters of the process  and click on the process name in the drop-down list.



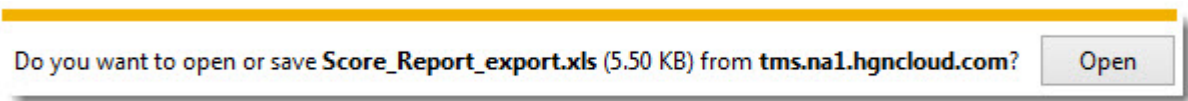
5. Click **Generate Report** icon (the report will be run using the selected processes).



6. Click on the Export to Microsoft Excel icon.



7. Click Open.



8. The report opens in Excel.

Overall Score	Subject Name	Evaluator Name	Process Title
4.000	Boileau Micheline	Pagé, Daniel	2014 Evaluation
4.000	Laframboise, Marc	Pagé, Daniel	2014 Evaluation
3.000	Dufresne, Denise	Pagé, Daniel	2014 Evaluation
3.000	Rinfret, Martin	Pagé, Daniel	2014 Evaluation
3.000	Sauriol, Lucienne	Pagé, Daniel	2014 Evaluation

# The HR Administrator

## HR Administrator Role

The HR Administrators have the responsibility to ensure that the processes are completed on time.

The HR Administrator *only has access* to the information of the employees of the faculty/ service for which they are responsible.

The HR Administrator can do many operations however, he or she **must always select the on-going process for which he/she is doing a modification.**

Briefly, the HR Administrator may:

1. Browse the information from then **Notification Center**, he/she cannot modify it. The **Notification Center**, is used to create and configure the automatic reminders.
2. Assign a temporary supervisor in an on-going process and to which he/she has access.
3. Browse the list of supervisors assigned to an on-going process and to which he/she has access.
4. Browse the list of participants for which no supervisor was assigned.
5. Add participants in an on-going process.
6. Change the 2nd level supervisor in an on-going process.
7. Return to a preceding step (roll-back) in an on-going process.
8. Complete a step in an on-going process.
9. Execute reports from the **Report Center an on-going process**.
10. Browse the status of all an on-going processes or browse the submitted forms.
11. Assign forms for an on-going process

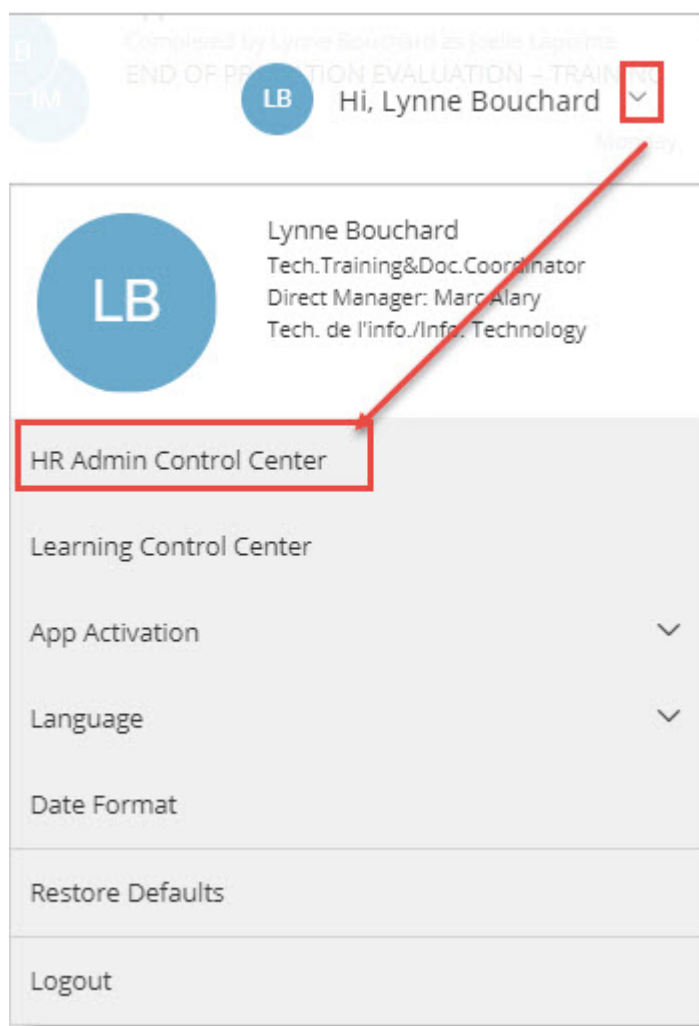
The next sections of the present guide describe in detail the use of each above-mentioned operations and how to perform them.

## Definitions

It is necessary to understand the different components of Halogen and to understand its definitions.

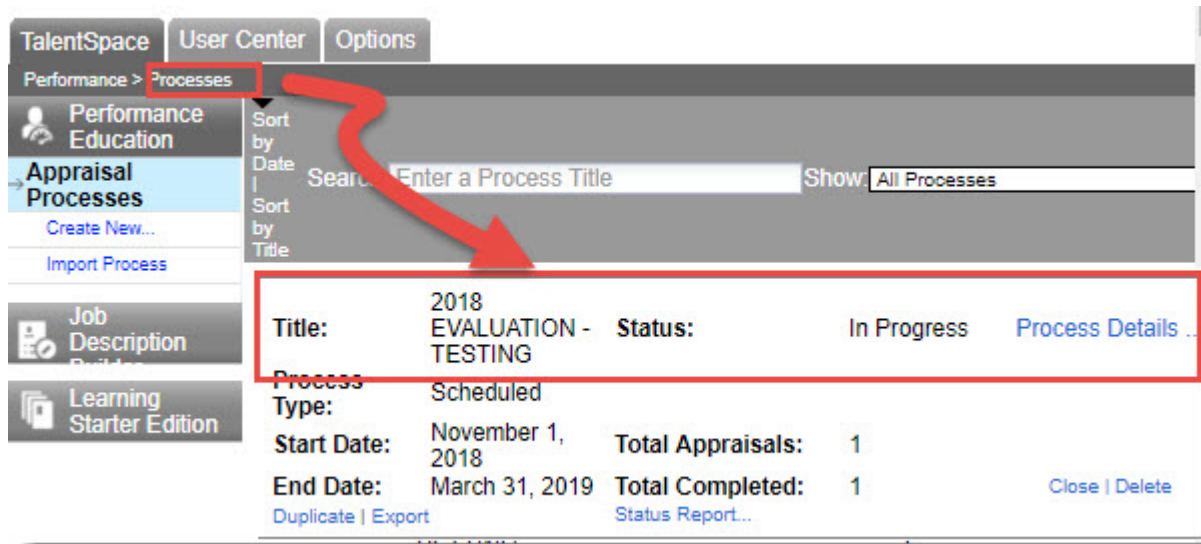
Differences between the user interface and the **HR Admin Control Center** in Halogen.

- The user interface is used by employees to complete processes which they have been assigned. They also use this interface to make changes in the MY PERFORMANCE tab. The user interface looks like the following illustration.



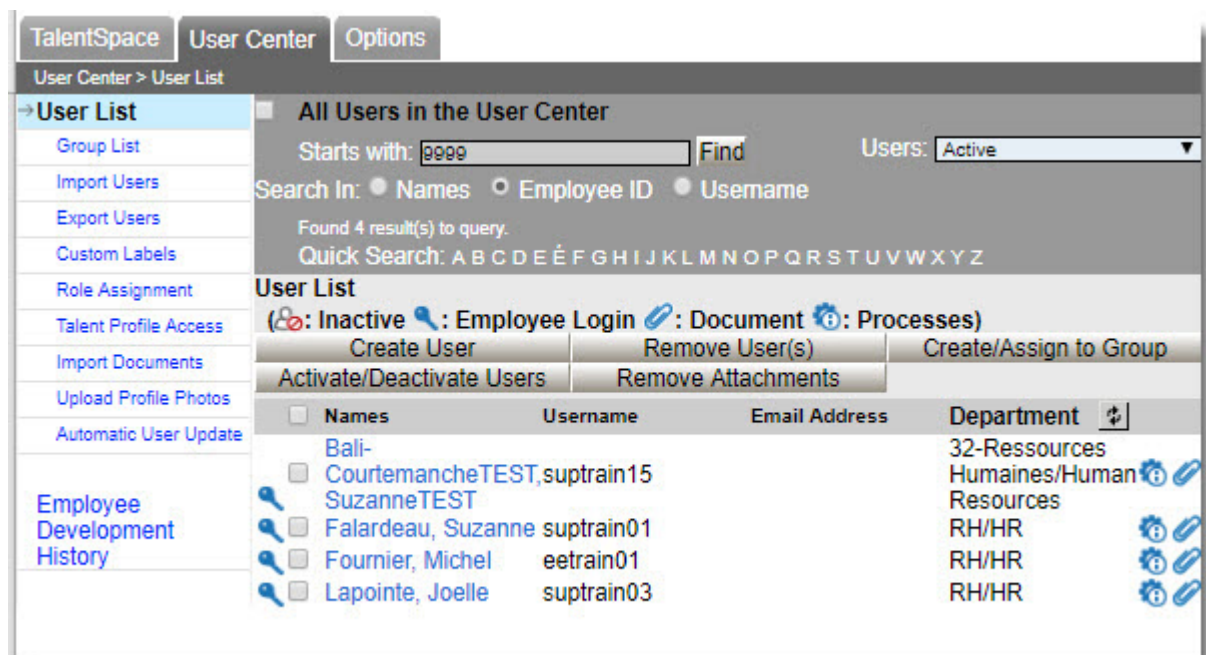
- The **HR Admin Control Center** is the back end interface that enables the administration of a specific process. This interface is used by designated HR

Administrators in each faculty/service. He/she must click on **HR Admin Control Center** to access it. (see the red box in the above image). Every operation in the **HR Admin Control Center** begins by the selection of the **process**. The following image is a snapshot taken from the HR Admin Control Center.



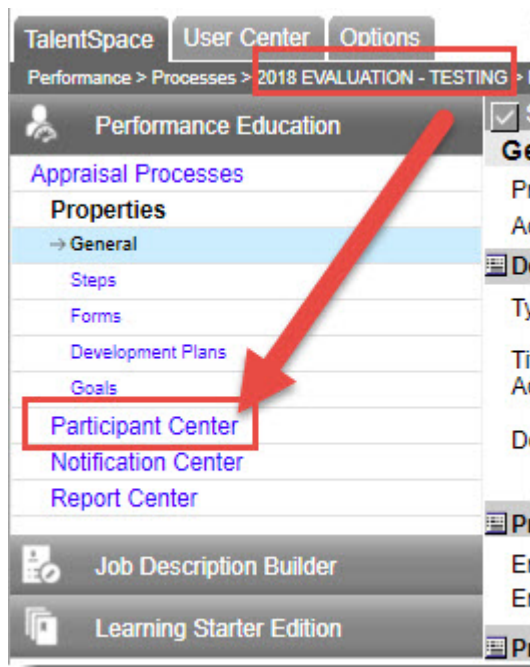
The **User Center** and the **Participant Center**

- The **User Center** contains the name of all Halogen users regardless of what their role may be (evaluated employee, supervisor, 2nd level supervisor and/or HR Administrator). The HR Administrator can only see the employees that belong to his/her unit in the User Center. If the name of one employee does not appear, the HR Administrator must send an email to [performance@uottawa.ca](mailto:performance@uottawa.ca)



- The Participant Center contains names of all the users that have been associated to a specific process. For example, employees on probation are the only ones assigned to the Probation Goal Setting and Probation Evaluation processes. The Participant Center appears after the selection of the process.





To gain access to a process, the HR Administrator must belong to the list of participants of that process. If the HR administrator does not have access to a process, then he/she must send an email to [performance@uottawa.ca](mailto:performance@uottawa.ca).

The **Assigned** section of the **Participant Center** allows the user to see if a supervisor (**Manager**), an HR Administrator (*HR Rep*) and a *Form* have all been assigned to each participant in an ongoing process. If either one of these is missing, then it must be added.


	Participant	Assigned		
		Manager	HR Rep	Form
<input type="checkbox"/>	Bonneville, Jeff	✓	✓	EVAL2016
<input type="checkbox"/>	Bouchard, Lynne	✓	✗	Default
<input type="checkbox"/>	Falardeau, Suzanne	✓	✓	Default
<input type="checkbox"/>	Lapointe, Joelle	✗	✓	Default

The **Appraisal** section of the **Participant Center** allows the user to see if the participant must be evaluated and which steps need to be completed.

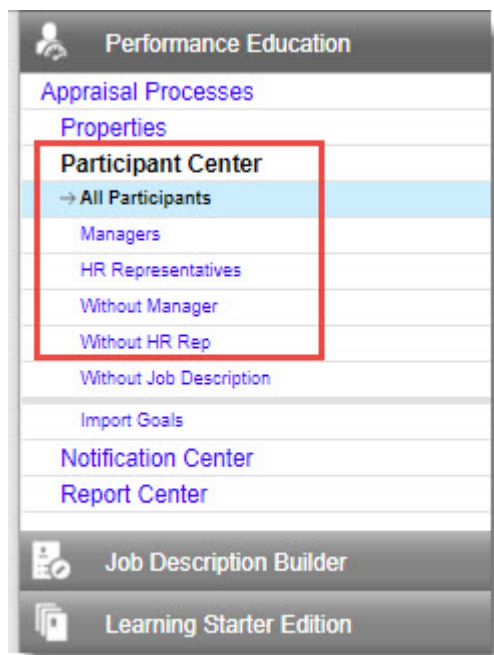
	Participant	Assigned			Appraisal		
		Manager	HR Rep	Form	Status	Self	Final
<input type="checkbox"/>	 Bonneville, Jeff	✓	✓	EVAL2016	Status		
<input type="checkbox"/>	 Bouchard, Lynne	✓	×	Default			
<input type="checkbox"/>	 Falardeau, Suzanne	✓	✓	Default			
<input type="checkbox"/>	 Lapointe, Joelle	×	✓	Default			

The word **Status** written in blue indicates that the participant must be evaluated.

If a magnifying glass appears in one of the two columns (Self / Final) it indicates the last completed step in an ongoing process. The HR Administrator can force the return (roll-back) to a preceding step in a form or can complete one (or more) following step(s).

Assigned			Appraisal		
Manager	HR Rep	Form	Status	Self	Final
✓	✓	PROBEVAL_FR	Status		
✓	✓	Default			

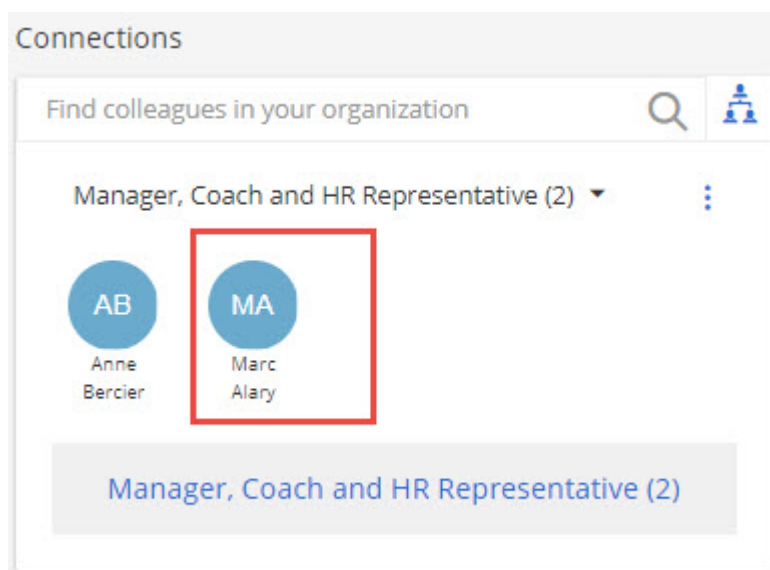
The left menu of the **Participant Center** allows the user to perform many operations such as browse the list of participants assigned to the ongoing process, browse the list of HR Administrators assigned to the process, browse the list of participants that have a role of supervisor (Manager) and last, to see which participants do not have supervisors (Without Managers) in the ongoing process.



Difference between the permanent supervisor and the temporary supervisor

- The permanent supervisor

**IMPORTANT:** the name of the supervisor displayed on the employee's profile is the name of the permanent supervisor and only HR can modify it.



- The temporary supervisor

However, when an ongoing process cannot be completed because the supervisor is absent, the HR Administrator can assign a temporary supervisor to the process. When the process is completed, the temporary supervisor disappears.

	Participant	Assigned		
		Manager	HR Rep	Form
<input type="checkbox"/>	Alary, Marc	✓	✓	Default
<input type="checkbox"/>	Beaulieu, Vincent	✓	×	Default
<input type="checkbox"/>	Bercier, Anne	×	×	Default
<input type="checkbox"/>	Bernier, Martin	✓	✓	Default
<input type="checkbox"/>	Bouchard, Lynne	✓	✓	EVAL2016
<input type="checkbox"/>	D'Amour, Francine	✓	×	EVAL2016_FR
<input type="checkbox"/>	Falardeau, Suzanne	✓	✓	EVAL2016_FR
<input type="checkbox"/>	Fournier, Michel	✓	✓	EVAL2016_FR
<input type="checkbox"/>	Frémont, Jacques	×	×	Default
<input type="checkbox"/>	Jalby, Valérie	×	×	Default

## Options from the *Participant Center*

The HR Administrator can perform many operations using the buttons of the Participant Center.

The following icons allows to perform the following operations:

All Participants (  : HR Rep,  : Manager/Evaluator,  : To be Evaluated )					
Add Participants	Create/Assign to Group	Unassign From Group	Remove Selected Items	Update Relationships	
Assign Form	Assign Role(s)	Assign Manager	Assign HR Rep	Update Group Assignmer	
Assign Approver	Complete Steps			Assigned	Appraisal

1. **Add participants** : allows the user to add participants to an ongoing process.
2. **Assign Form:** allows the user to assign a form in an ongoing process.
3. **Assign Role(s)** : allows the user to assign a role to a participant in an ongoing process.
4. **Assign Manager** : allows the user to assign a supervisor (Manager) to a participant in an ongoing process.

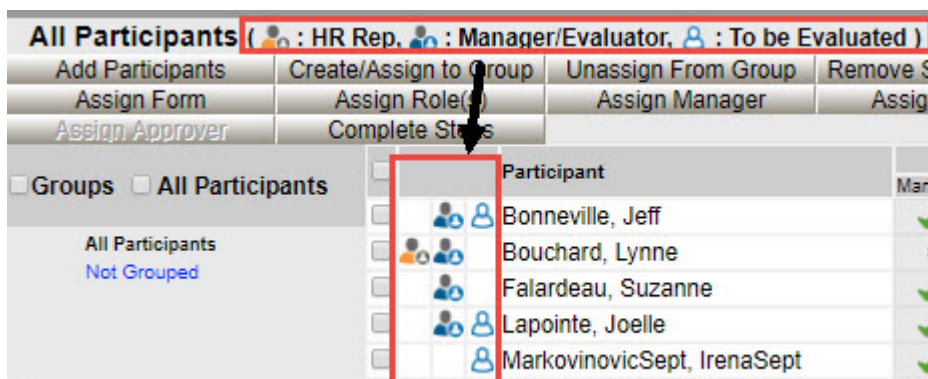
5. **Assign HR Rep** : allows the user to assign an HR Administrator (HR Rep) to a participant in an ongoing process.
6. **Complete Steps** : allows the user to force the completion of an ongoing process.

## Role of the Participants

The HR Administrator can see which role(s) have been assigned to each participant of his/her unit.

Three different roles can be assigned to each participant. An employee can have more than one role at the same time.

1. *HRRep* (HR Administrator): a user that has the responsibility to administer the back end of the system for his/her unit and to ensure that the employees and supervisors of his/her unit have completed the ongoing processes. There cannot be more than one HR Administrator per unit.
2. *Manager / Evaluator*: a user that has an approval step in an ongoing process.
3. *To be evaluated* : an employee that must be evaluated in an ongoing process.



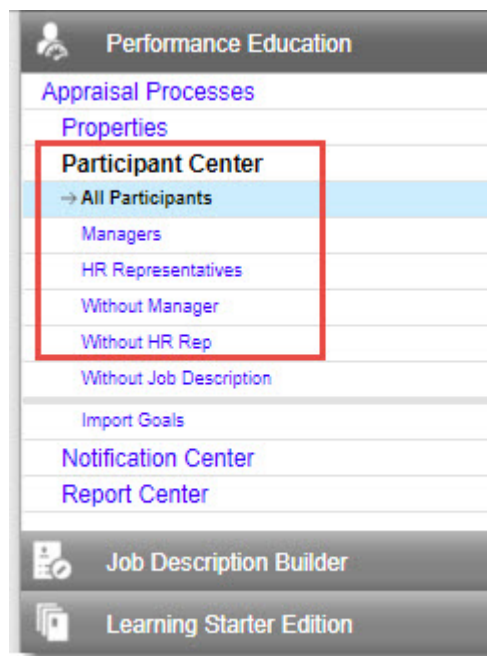


# The Participant Center

## Operations in the left menu of the Participant Center

Select one of the options from the left menu of the *Participant Center* to browse the list of participants, those that have a role of supervisor, HR Administrator of your unit or last, the list of participants who have no supervisor assigned.

1. Click on one of the following options:
  - **All Participants** to be able to see the list of all participants assigned to the ongoing process.
  - **Manager** to be able to see the list of all participants who have the manager role, please refer to the section on manager role assignment in this guide.
  - **Without Manager** to be able to see the list of participants who do not have a supervisor (Manager) assigned. Please refer to the section on manager role assignment in this guide.



The system displays the list depending on the option you selected.

1. The option **All Participants** displays the list of all participants assigned to the ongoing process, regardless of their role.

	Participant	Assigned		
		Manager	HR Rep	Form
<input type="checkbox"/>	Bonneville, Jeff	✓	✓	EVAL2016
<input type="checkbox"/>	Bouchard, Lynne	✓	×	Default
<input type="checkbox"/>	Falardeau, Suzanne	✓	✓	Default

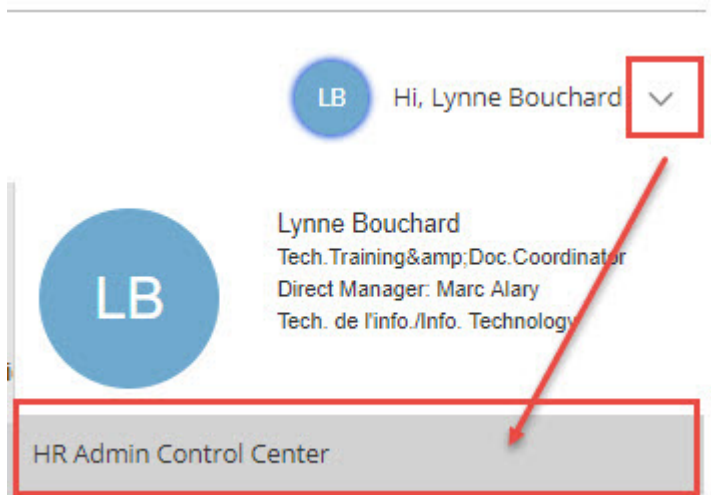
## Assigning a Role

You can assign a role to a participant in an ongoing process.

For example, one of the employees of your unit has recently become a supervisor, you will need to assign the Manager role so that he/she can approve the forms submitted by his/her direct reports.

### Opening the *HR Admin Control Center*

1. Click **HR Admin Control Center** from the upper right corner of your screen.





2. Select the process by clicking on [Process Details](#).

The screenshot shows the TalentSpace interface with the 'Processes' page selected. The left sidebar contains navigation options: Performance Education, Appraisal Processes, Job Description Builder, and Learning Starter Edition. The main content area displays a list of processes. A red box highlights the process titled '2018 EVALUATION - TESTING', which has a status of 'In Progress'. A red arrow points from the 'Processes' tab to the 'Process Details' link for this process.

Title:	2018 EVALUATION - TESTING	Status:	In Progress	<a href="#">Process Details</a>
Process Type:	Scheduled			
Start Date:	November 1, 2018	Total Appraisals:	1	
End Date:	March 31, 2019	Total Completed:	1	<a href="#">Close</a>   <a href="#">Delete</a>
	<a href="#">Duplicate</a>   <a href="#">Export</a>	<a href="#">Status Report...</a>		

## Opening the *Participant Center*

1. Click [Participant Center](#).

The screenshot shows the TalentSpace interface with the 'Participant Center' option highlighted in the left sidebar. The sidebar contains navigation options: Performance Education, Appraisal Processes, Properties, General, Steps, Forms, Development Plans, Goals, Participant Center, Notification Center, and Report Center. The 'Participant Center' option is highlighted with a red box.

## Role Assignment

You can assign roles for more than one person at once and you can assign more than one role at once.

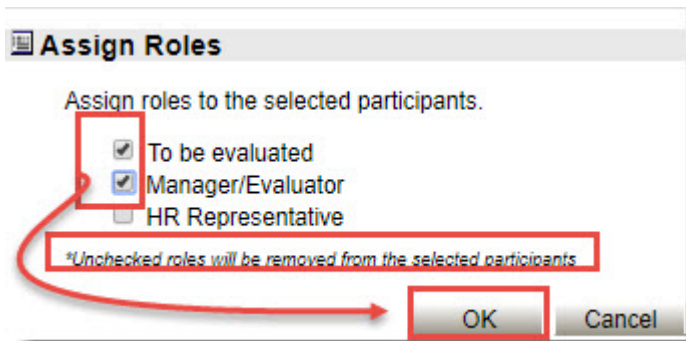
1. Select the employees for whom you are assigning a role by clicking in the box beside the employee name.
2. Click **Assign Role(s)**.

The screenshot shows the 'All Participants' interface. At the top, there are tabs for 'Add Participants', 'Create/Assign to Group', 'Unassign From Group', 'Remove Selected Items', and 'Update'. Below these are buttons for 'Assign Form', 'Assign Role(s)', 'Assign Manager', 'Assign HR Rep', and 'Update'. The 'Assign Role(s)' button is highlighted with a red box and a red arrow pointing to it. Below the buttons, there are checkboxes for 'Groups' and 'All Participants'. The 'All Participants' checkbox is selected. Below this, there is a table with the following columns: 'Participant', 'Manager', 'HR Rep', and 'Form'. The table contains four rows of data:

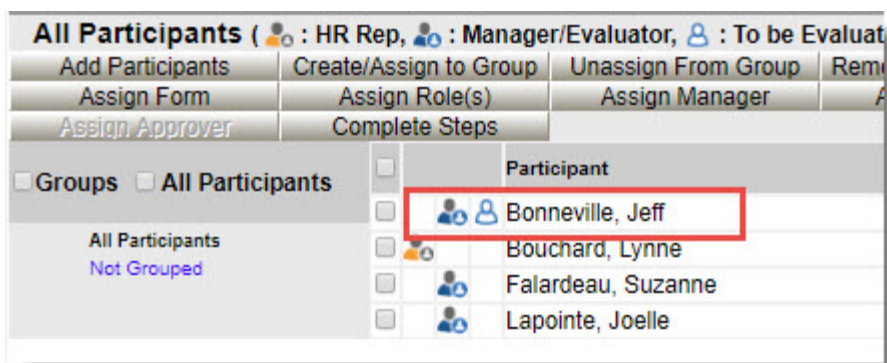
Participant	Assigned		
	Manager	HR Rep	Form
<input checked="" type="checkbox"/> Bonneville, Jeff	✓	✓	EVAL2016
<input type="checkbox"/> Bouchard, Lynne	✓	×	Default
<input type="checkbox"/> Falardeau, Suzanne	✓	✓	Default
<input type="checkbox"/> Lapointe, Joelle	×	✓	Default

Attention: the selected role(s) will replace the existing one(s). If the employee must be evaluated and is a supervisor, select both **To be evaluated** and **Manager/Évaluateur** roles.

3. Select the role(s) to add then Click **OK**.

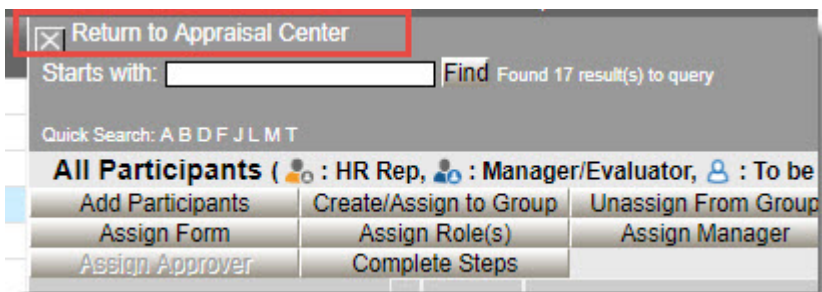


The **Manager/Evaluator** role was added to the existing **To be evaluated** role.

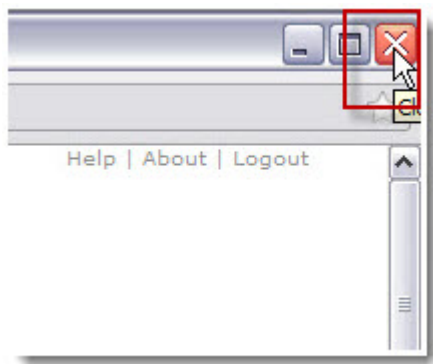


## Returning to the user interface

1. Click **Return to Appraisal Center**.



2. Click on the **X** in the upper right to return to the user interface.

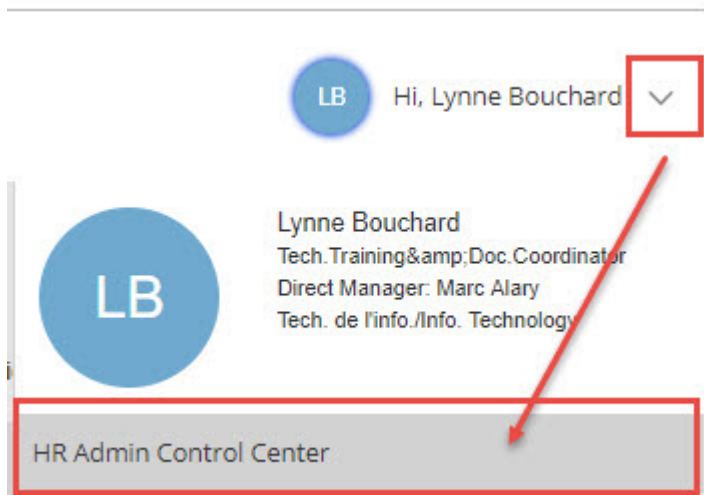


## Adding a participant

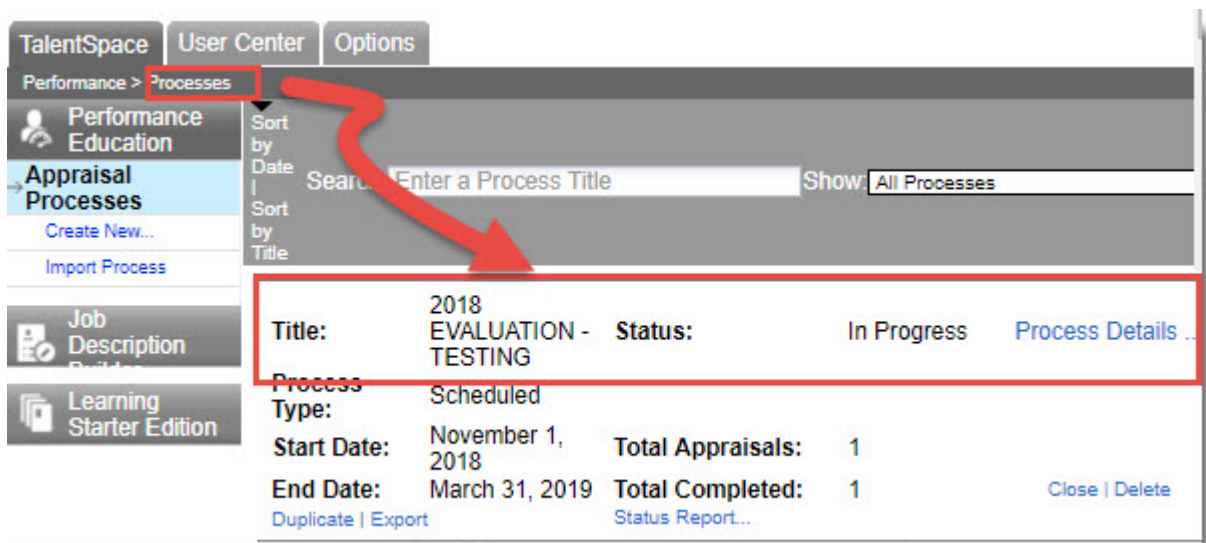
The **Participant Center** is used to add users in ongoing processes, to assign supervisor, HR Administrators or 2nd level supervisors in ongoing processes. The **Participant Center** takes user data from the **User Center** but since the HR Administrator can only see employees from his/her unit, it is possible that the user that needs to be added to the process does not appear in the list provided from the User Center. In that case, the HR Administrator must contact central HR at [performance@uottawa.ca](mailto:performance@uottawa.ca)

## Opening the *HR Admin Control Center*

1. Click **HR Admin Control Center** from the upper right corner of your screen.

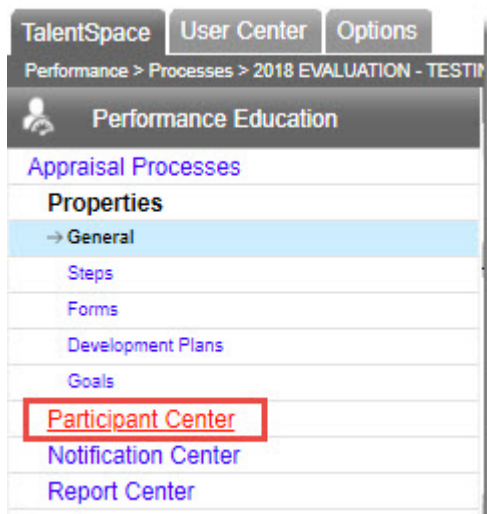


2. Select the process by clicking on **Process Details**.



## Opening the *Participant Center*

1. Click **Participant Center**.



## Adding a participant

HR Administrators can only add participants to the Goal Setting process and to the Evaluation process.

1. Click **Add Participant**.



2. Find the employee to be added to the ongoing process. You can search the employee two ways:
  - Type the last name in the field **Starts With** and click **Find**.
  - Click on the first letter of the last name of the employee in the **Quick Search** section.
3. Click inside the box beside the name of the employee to be added.
4. Select the participant role in the **Options** section.

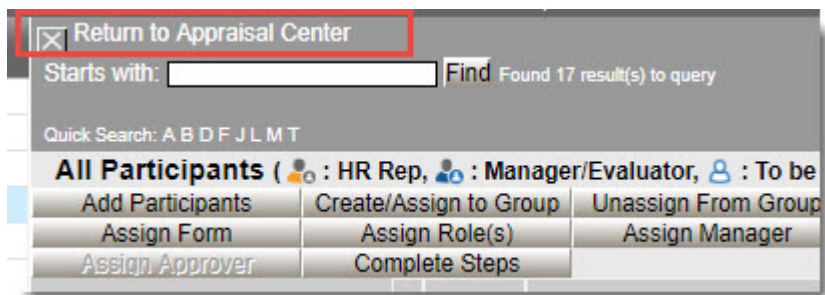
If the participant must be evaluated, select nothing. The To be Evaluated role is given automatically by the system when adding a participant.
5. Click on **OK**.

The screenshot shows the 'Add Participants' dialog box. Red boxes and arrows highlight the following steps:

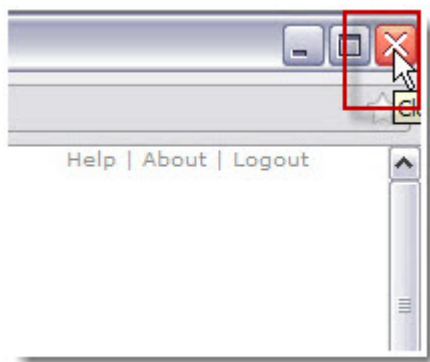
- Starts with** field: Contains 'markovinovics'.
- Find** button: Located next to the 'Starts with' field.
- Quick Search**: A row of letters (A-Z) for searching by first letter.
- Table**: A table with columns 'Name' and 'Email Address'. The first row is 'MarkovinoviciSept, IrenaSept' with a checked checkbox.
- Options** section: Contains the text 'Add following role(s) on import:' and three checkboxes: 'Manager/Evaluator', 'HR Representative', and 'To be evaluated' (which is checked).
- OK** button: Located at the bottom right of the dialog.

## Returning to the user interface

1. Click **Return to Appraisal Center**.



2. Click on the **X** in the upper right to return to the user interface.



## Finalization of a step

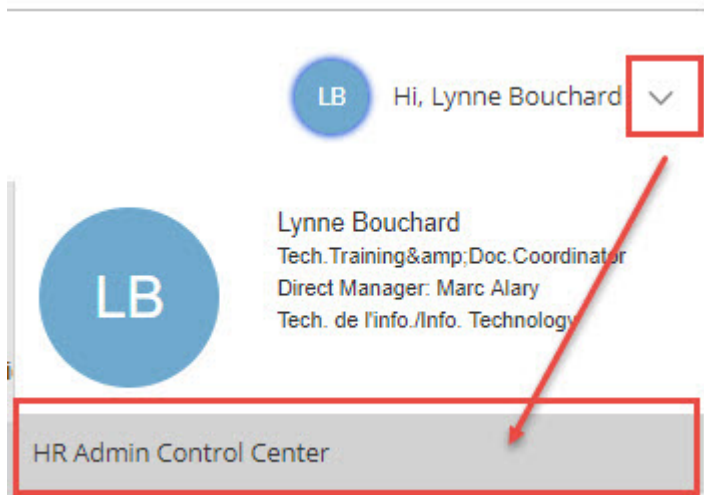
The HR Administrator can force the finalization of a step to complete a process.

For example, in the annual evaluation process, the second level supervisor must give his/her final approval at the last step. If the second level supervisor is sick or absent and will not be able to give the final approval before the process due date, the HR Administrator can force the finalization of the step so that the process be completed on time.

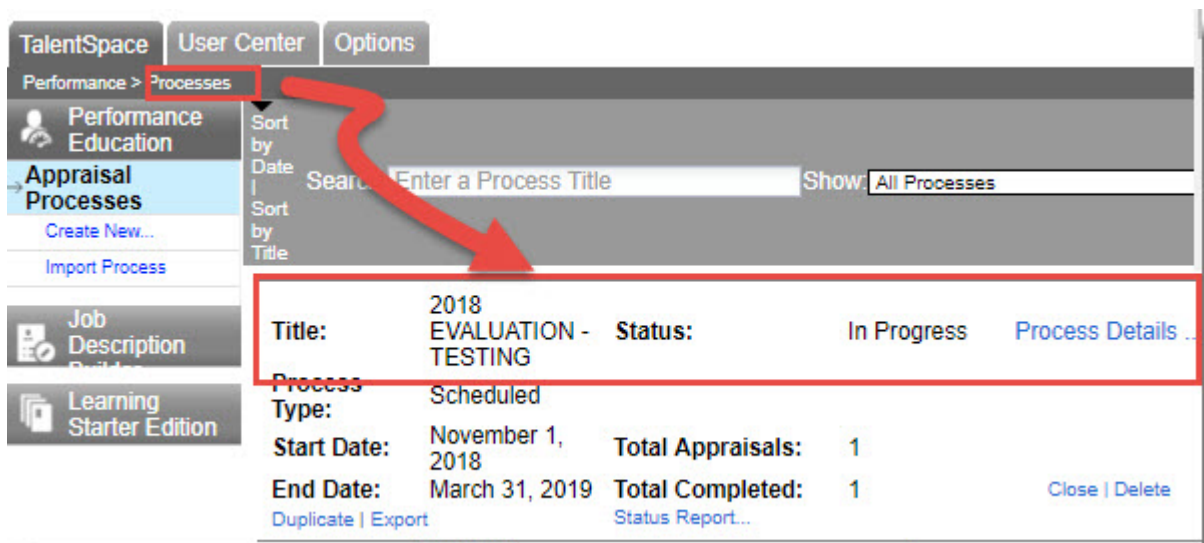


## Opening the *HR Admin Control Center*

1. Click **HR Admin Control Center** from the upper right corner of your screen.

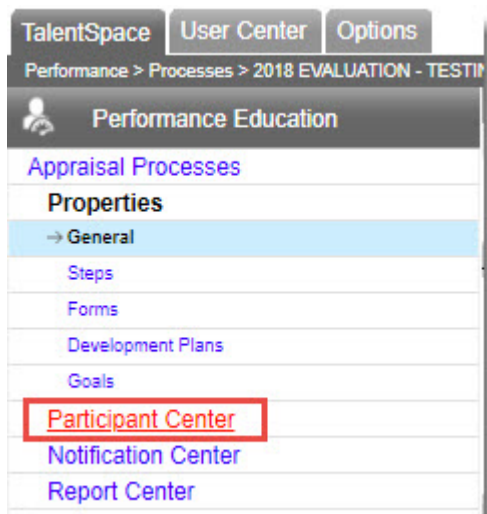


2. Select the process by clicking on **Process Details**.



## Opening the *Participant Center*

1. Click **Participant Center**.



## Selection of the participant and finalization of a step

You can complete one step or all steps at once.

1. Click **Status** of the employee for whom you need to force the finalization of a step.

	Participant	Assigned			Appraisal		
		Manager	HR Rep	Form	Status	Self	Final
	Bonneville, Jeff	✓	✓	EVAL2016	Status		
	Bouchard, Lynne	✓	×	Default			
	Falardeau, Suzanne	✓	✓	Default			
	Lapointe, Joelle	×	✓	Default			
	MarkovinicSept, IrenaSept	✓	✓	Default	Status		

2. Click **Complete** or **Complete All** (to complete all the steps of the process).

Saba TalentSpace - Google Chrome  
 https://global.hgnccloud.com/uottawa/eAppraisal/participant/participantAppr...

### Individual Appraisal Status

Employee Name : MarkovinovicSept, IrenaSept  
 Manager/Evaluator : Falardeau, Suzanne  
 E-Mail :

2nd-Level Manager : Lapointe, Joelle **Change...**

3rd-Level Manager : **Change...**

4th-Level Manager : **Change...**

HR Rep: Bouchard, Lynne  
 Appraisal Form: Default  
 Last Appraisal Completed Date: October 30, 2017  
 Last Interim Review Date: December 10, 2018  
 Employee Hire Date: June 4, 2018  
 Last Promotion Date: June 4, 2018

**Prevent Updates:**  
☐ checked items will not be updated from the hierarchy in the User Center - except when using the 'Update Relationships' button

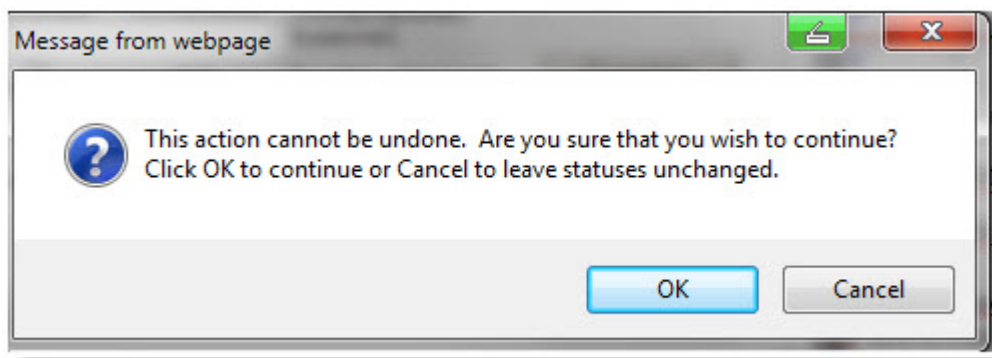
Set to In Progress	Appraisal Step	Status	Completion (MMMM d, yyyy)	Person Responsible	Mark Step as Completed
	L'employé rédige son autoévaluation	Approaching Due	N/A	MarkovinovicSept, IrenaSept	<b>Complete</b>
	Superviseur immédiat rédige l'évaluation des employés	Not Ready	N/A	Falardeau, Suzanne	
	Superviseur de deuxième niveau rédige des commentaires sur l'évaluation de l'employé	Not Ready	N/A	Lapointe, Joelle	
	Superviseur immédiat signe	Not Ready	N/A	Falardeau, Suzanne	
	Employé signe	Not Ready	N/A	MarkovinovicSept, IrenaSept	

Indicates additional information when placing your mouse over this icon.





**Complete All**

**OK** **Cancel**

3. Click .



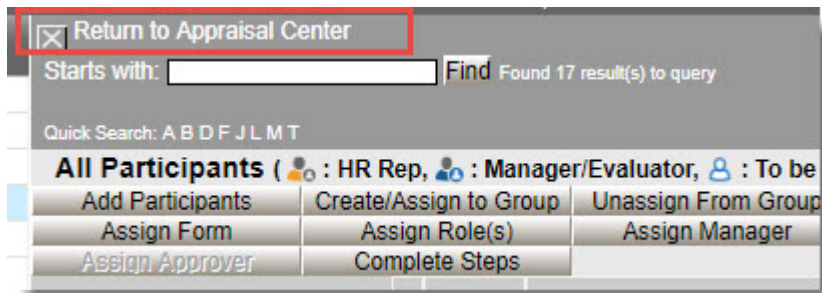
The finalization of the step has been completed. Placing the mouse over the additional info icon will show that the step was completed by an HR Administrator.

Set to In Progress	Appraisal Step	Status	Completion (mm/dd/yyyy)	Person Responsible	Mark Step as Completed
<input type="radio"/>	Employee writes goals	Complete	11/18/2013	 Bali-Courtemanche1, Suzanne1	
<input type="radio"/>	Manager reviews and finalizes goals for direct reports	Complete	11/25/2013	 Boucher, Sylvain1	
	Employee signs off	In Progress	N/A	 Bali-Courtemanche1, Suzanne1	
 Indicates additional information when placing your mouse over this icon.					

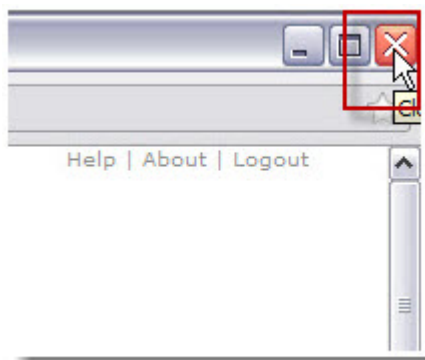
4. Click .

## Returning to the user interface

1. Click **Return to Appraisal Center**.



2. Click on the **X** in the upper right to return to the user interface.



## The Rollback

The HR Administrator can force a roll-back to a preceding step.

1. If a magnifying glass appears under the **Self** column, it indicates that the self evaluation has been started.
2. If a magnifying glass appears under the **Final** column, it indicates that the supervisor of the evaluated employee has started the approval step.

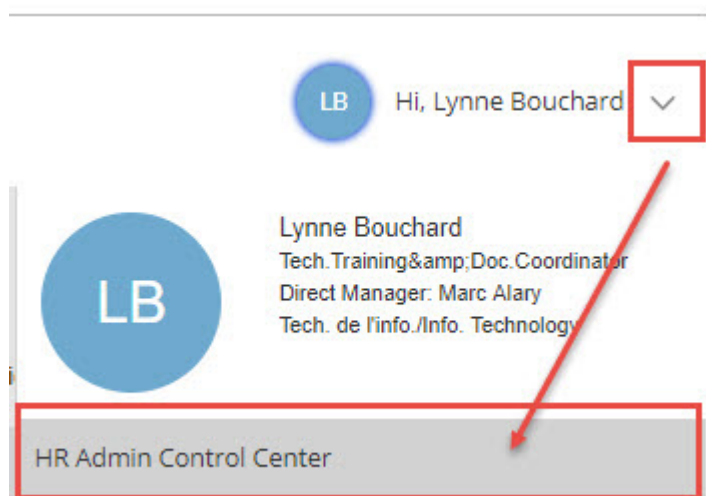
- It is possible to rollback the status of a step so that the person responsible of the step can return to the form, modify it and re-submit it when completed.

Participant	Assigned			Appraisal		
	Manager	HR Rep	Form	Status	Self	Final
Bonneville, Jeff	✓	✓	EVAL2016	Status		
Bouchard, Lynne	✓	×	Default			
Falardeau, Suzanne	✓	✓	Default			
Lapointe, Joelle	✓	✓	Default	Status		
MarkovinoSept, IrenaSept	✓	✓	Default	Status		

- It is possible to return to most of the steps of a process without having to delete the form filled by the participant. However, if you must return the form to an employee (the first step of the process) so that he/she is able to modify it, you will have to delete the form filled by the supervisor by selecting the [Delete Appraisal data](#) option.

## Opening the *HR Admin Control Center*

- Click [HR Admin Control Center](#) from the upper right corner of your screen.



2. Select the process by clicking on [Process Details](#).

The screenshot shows the TalentSpace interface with the 'Performance > Processes' breadcrumb. The left sidebar has 'Appraisal Processes' selected. The main area displays a list of processes. A red box highlights the first process, '2018 EVALUATION - TESTING', which is in 'In Progress' status. A red arrow points from the 'Appraisal Processes' menu item to the 'Process Details' link for this process.

Title:	2018 EVALUATION - TESTING	Status:	In Progress	<a href="#">Process Details</a>
Process Type:	Scheduled			
Start Date:	November 1, 2018	Total Appraisals:	1	
End Date:	March 31, 2019	Total Completed:	1	<a href="#">Close</a>   <a href="#">Delete</a>
	<a href="#">Duplicate</a>   <a href="#">Export</a>	<a href="#">Status Report...</a>		

## Opening the *Participant Center*

1. Click [Participant Center](#).

The screenshot shows the TalentSpace interface with the 'Performance > Processes > 2018 EVALUATION - TESTING' breadcrumb. The left sidebar has 'Appraisal Processes' selected. The 'Participant Center' link is highlighted with a red box.

Performance Education
<a href="#">Appraisal Processes</a>
<b>Properties</b>
→ <a href="#">General</a>
<a href="#">Steps</a>
<a href="#">Forms</a>
<a href="#">Development Plans</a>
<a href="#">Goals</a>
<a href="#">Participant Center</a>
<a href="#">Notification Center</a>
<a href="#">Report Center</a>



## Selection of the participant and roll-back


You can only rollback the form one step at a time. You cannot rollback to a step once the process has been completed.

1. Click **Status** of the employee for whom you need to roll-back the form to a preceding step.

Participant	Assigned			Appraisal		
	Manager	HR Rep	Form	Status	Self	Final
Bonneville, Jeff	✓	✓	EVAL2016	Status		
Bouchard, Lynne	✓	×	Default			
Falardeau, Suzanne	✓	✓	Default			
Lapointe, Joelle	✓	✓	Default	Status		
MarkovinovicSept, IrenaSept	✓	✓	Default	Status		

2. Click on the radio button of the column **Set to In Progress** to select the step where you need to return the form in the ongoing process.



3.  **Note: Attention** : when one ticks in one of the following boxes, DELETE SELF APPRAISAL DATA and/or DELETE APPRAISAL DATA, it deletes the forms that have been filled by the employee and the supervisor. DELETE SELF-APPRAISAL deletes the form filled by the employee whereas DELETE APPRAISAL DATA deletes the form filled by the supervisor. The Human Resources **cannot restore** a deleted form, this operation can only be performed by Halogen and there are costs to it.

(Optional) Click on the option that identifies which form will be deleted with the roll-back operation:

- If you do not select anything, the form filled by the supervisor will remain as is but if you need to return to form at the step where the employee will need to modify it, you will need to select **Delete Appraisal data**.
- **Delete Appraisal Data** (to remove the information entered in the form by the supervisor and to roll-back the completed status of the step completed by the supervisor).
- **Delete Self-Appraisal Data** (to remove the information entered in the form by the employee and to roll-back the completed status of the step completed by the employee).

**Individual Appraisal Status**

Employee Name : Bonneville, Jeff  
 Manager/Evaluator : Falardeau, Suzanne  
 E-Mail : test12345@uottawa.ca  
 2nd-Level Manager : Lapointe, Joelle Change...  
 3rd-Level Manager : Change...  
 4th-Level Manager : Change...

HR Rep: Bouchard, Lynne  
 Appraisal Form: EVAL2016 - Annual Performance Evaluation  
 Last Appraisal Completed Date: December 6, 2018  
 Last Interim Review Date: December 7, 2018  
 Employee Hire Date: June 4, 2018  
 Last Promotion Date:

☐ **Prevent Updates:**  
 checked items will not be updated from the hierarchy in the User Center - except when using the 'Update Relationships' button

Set to In Progress	Appraisal Step	Status	Completion (MMMM d, yyyy)	Person Responsible	Mark Step as Completed
<input checked="" type="radio"/>	L'employé rédige son autoévaluation	Complete	December 11, 2018	Bonneville, Jeff	
<input type="radio"/>	Superviseur immédiat rédige l'évaluation des employés	Complete	December 11, 2018	Falardeau, Suzanne	
<input type="radio"/>	Superviseur ou deuxième niveau rédige des commentaires sur l'évaluation de l'employé	In Progress	N/A	Lapointe, Joelle	<span>Complete</span>
<input type="radio"/>	Superviseur immédiat signe	Not Ready	N/A	Falardeau, Suzanne	
<input type="radio"/>	Employé signe	Not Ready	N/A	Bonneville, Jeff	

Indicates additional information when placing your mouse over this icon.

☒ Delete Appraisal response data Rollback Status  
☐ Delete Self-Appraisal response data

Complete All OK Cancel

4. Click **Rollback Status**.
5. Click on **OK**.

The system returns to the *Participant Center* and you can see the result of the roll-back. The form filled by the supervisor has been deleted because you had clicked on *Delete Appraisal response data* and the system indicates that the only completed step is the one performed by the employee. The magnifying glass previously displayed under the *Final* column has disappeared to indicate that this step has not been started yet.

Participant	Assigned			Appraisal		
	Manager	HR Rep	Form	Status	Self	Final
Bonneville, Jeff	✓	✓	EVAL2016	Status		

## Returning to the user interface




1. Click **Return to Appraisal Center**.



☐ Return to Appraisal Center

Starts with:  Find Found 17 result(s) to query

Quick Search: A B D F J L M T

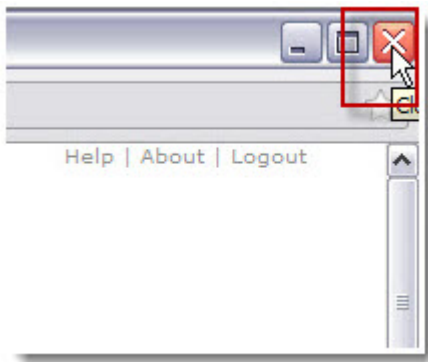
**All Participants** (  : HR Rep,  : Manager/Evaluator,  : To be

Add Participants Create/Assign to Group Unassign From Group

Assign Form Assign Role(s) Assign Manager

Assign Approver Complete Steps

2. Click on the **X** in the upper right to return to the user interface.

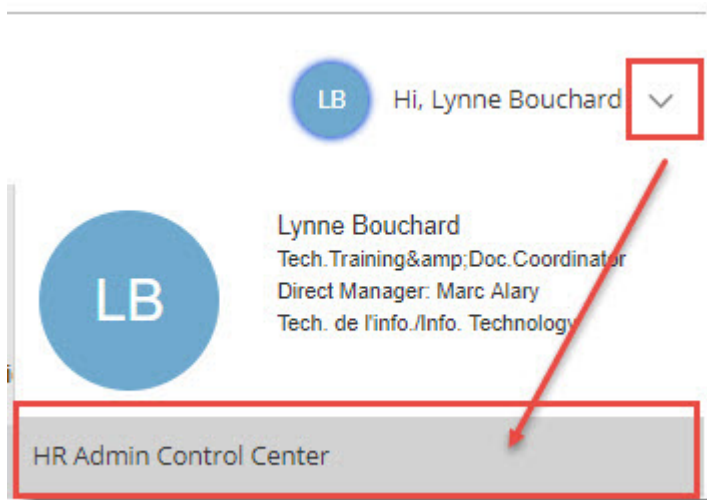


## Changing the Supervisor

The HR Administrator can **ONLY** assign a temporary supervisor in an ongoing process.

### Opening the *HR Admin Control Center*

1. Click **HR Admin Control Center** from the upper right corner of your screen.



2. Select the process by clicking on [Process Details](#).

The screenshot shows the TalentSpace interface with the 'Performance > Processes' breadcrumb. The left sidebar has 'Appraisal Processes' selected. The main area displays a list of processes. A red box highlights the first process, '2018 EVALUATION - TESTING', which is in 'In Progress' status. A red arrow points from the 'Appraisal Processes' menu item to the 'Process Details' link for this process.

Title:	2018 EVALUATION - TESTING	Status:	In Progress	<a href="#">Process Details</a>
Process Type:	Scheduled			
Start Date:	November 1, 2018	Total Appraisals:	1	
End Date:	March 31, 2019	Total Completed:	1	<a href="#">Close</a>   <a href="#">Delete</a>
	<a href="#">Duplicate</a>   <a href="#">Export</a>		<a href="#">Status Report...</a>	

## Opening the *Participant Center*

1. Click [Participant Center](#).

The screenshot shows the TalentSpace interface with the 'Performance > Processes > 2018 EVALUATION - TESTING' breadcrumb. The left sidebar has 'Appraisal Processes' selected. The 'Properties' section is expanded, and 'Participant Center' is highlighted with a red box.

Performance Education
<a href="#">Appraisal Processes</a>
<b>Properties</b>
→ <a href="#">General</a>
<a href="#">Steps</a>
<a href="#">Forms</a>
<a href="#">Development Plans</a>
<a href="#">Goals</a>
<b><a href="#">Participant Center</a></b>
<a href="#">Notification Center</a>
<a href="#">Report Center</a>

## Assigning a supervisor

1. Select the employee(s) for whom you are assigning a role by clicking in the box beside the employee name.
2. Click **Assign Manager**.

**All Participants** ( : HR Rep, : Manager/Evaluator, : To be Evaluated )

Add Participants	Create/Assign to Group	<b>Unassign From Group</b>	Remove Selected Items	Update I
Assign Form	Assign Role(s)	<b>Assign Manager</b>	Assign HR Rep	Update Gr
Assign Approver	Complete Steps			

☐ Groups ☐ All Participants

All Participants  
Not Grouped

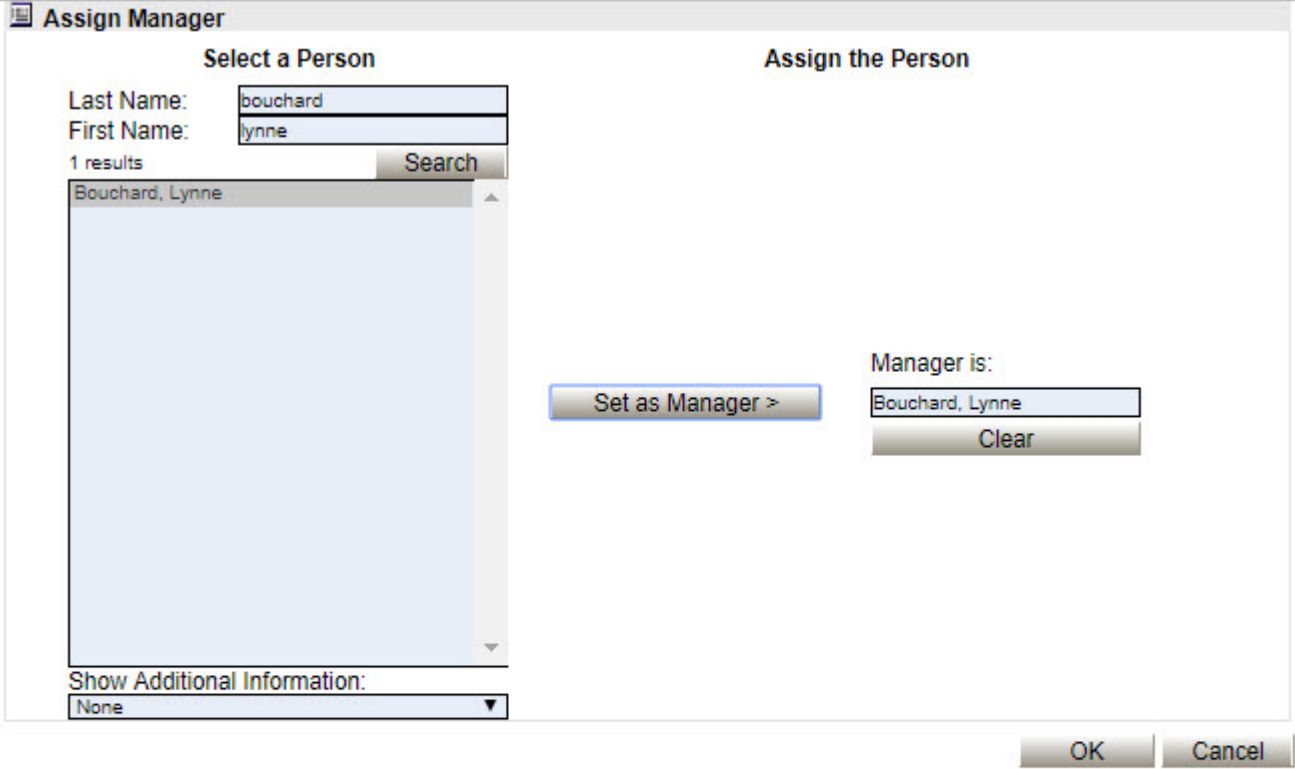
	Participant	Assigned		
		Manager	HR Rep	Form
<input type="checkbox"/>	Bonneville, Jeff	✓	✓	Eval2016
<input type="checkbox"/>	Bouchard, Lynne	×	×	Default
<input checked="" type="checkbox"/>	Falardeau, Suzanne	✓	✓	Default
<input type="checkbox"/>	Lapointe, Joelle	✓	✓	Default
<input type="checkbox"/>	MarkovinoSept, IrenaSept	✓	✓	Default

## Searching supervisor name

To assign a supervisor, you must first find him/her. It is possible that the employee already has an assigned supervisor but if he/she cannot complete the on-going process, you will need to assign a temporary one. The supervisor must be in the Participant Center of the selected process.

1. Supervisor Name Search.
2. (Optional) Click **Clear** to remove the existing supervisor.

3. Type the supervisor's .



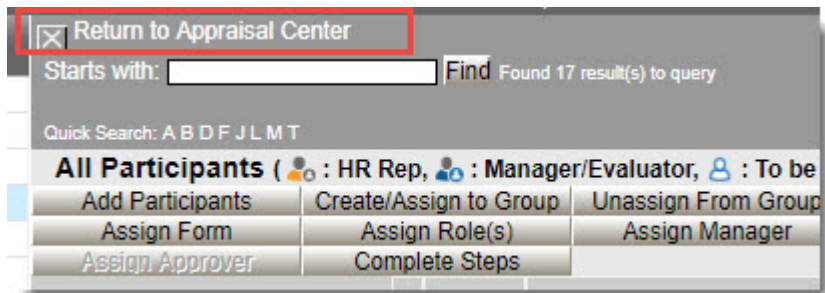
The image shows a software dialog box titled "Assign Manager". It is divided into two main sections: "Select a Person" on the left and "Assign the Person" on the right. In the "Select a Person" section, there are input fields for "Last Name:" (containing "bouchard") and "First Name:" (containing "lynne"). Below these is a "Search" button and a list box showing "1 results" with the entry "Bouchard, Lynne". At the bottom of this section is a "Show Additional Information:" dropdown menu set to "None". In the "Assign the Person" section, there is a "Manager is:" label above a text field containing "Bouchard, Lynne" and a "Clear" button. A "Set as Manager >" button is positioned between the two sections. At the bottom right of the dialog are "OK" and "Cancel" buttons.

4. Type the supervisor's .
5. Click .
6. Click on the supervisor's name to assign.
7. Click on .
8. Click .

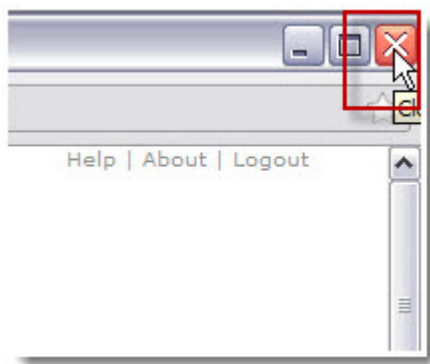
A pop-up window will appear to indicate that Halogen is currently assigning the temporary supervisor.

## Returning to the user interface

1. Click **Return to Appraisal Center**.



2. Click on the **X** in the upper right to return to the user interface.



## Assigning the Form

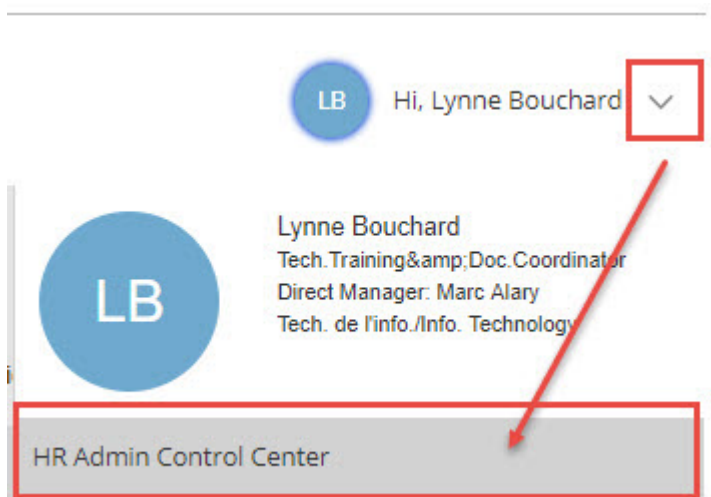
Forms are associated to processes and they are assigned to each participant according to their language of preference.

However, you might be asked to assign an English form to an employee that has French as his/her language of preference or vice-versa.

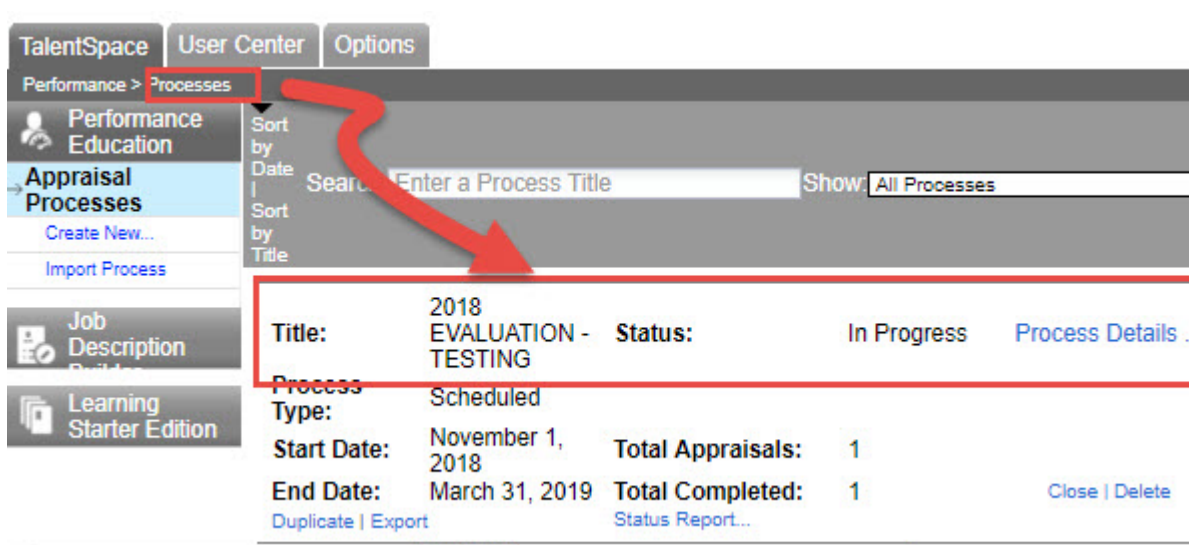


## Opening the *HR Admin Control Center*

1. Click **HR Admin Control Center** from the upper right corner of your screen.



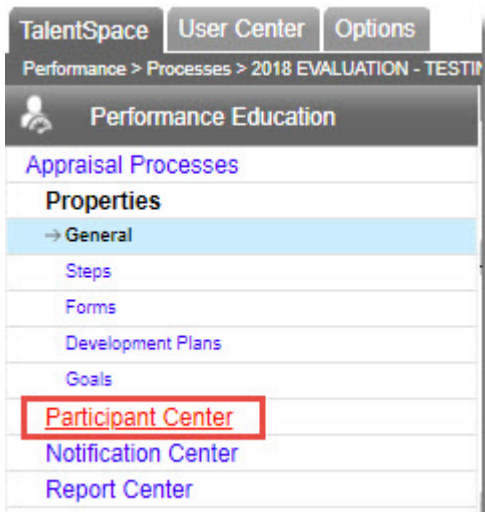
2. Select the process by clicking on **Process Details**.





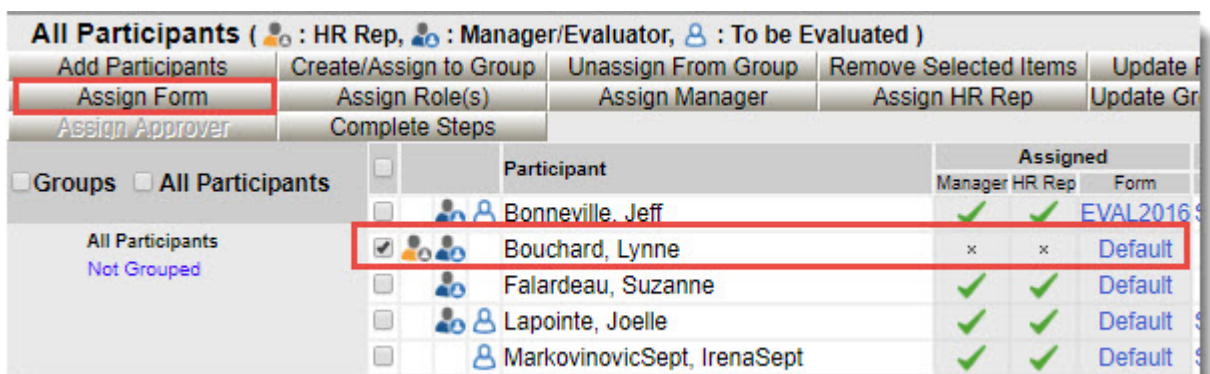
## Opening the *Participant Center*

1. Click **Participant Center**.



## Assigning a Form

1. Select the employee for whom you are assigning a form.
2. Click **Assign Form**.



3. Click on the form name to assign.
4. Click **Assign Form**.

5. Click **OK**.

**Assign Appraisal Form to Participant(s)**

**Assign...**

☒ Specific Form ☐ Based on User Field

**Select a Form**

Search form codes or titles

**Search** **Reset**

Form Code - Form Title (2 results)

GOALSETTING2013 - 2013 Goal Se

GOALSETTING\_FR - Formulaire d'é

**Assign Form >**

Assigned form is: GOALSETTING\_FR - Formulaire d'é

**Reset to Default**

☐ Assign to subgroups (if groups are selected)

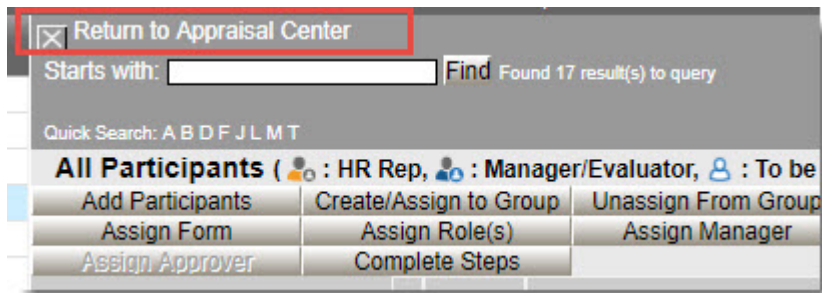
**OK** **Cancel**

The system returns to the Participant Center and displays the newly assigned form.

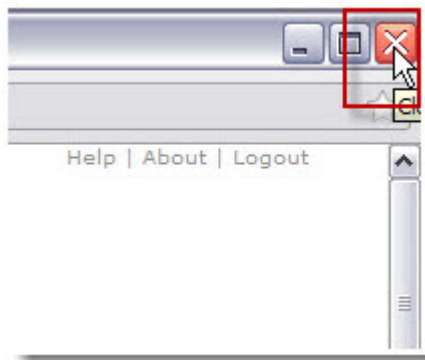
	Participant	Assigned	
		Manager HR Rep	Form
<input type="checkbox"/>	Bonneville, Jeff	✓	✓
<input type="checkbox"/>	Bouchard, Lynne	×	×
<input type="checkbox"/>	Falardeau, Suzanne	✓	✓
<input type="checkbox"/>	Lapointe, Joelle	✓	✓
<input type="checkbox"/>	MarkovinoSept, IrenaSept	✓	✓

## Returning to the user interface

1. Click **Return to Appraisal Center**.



2. Click on the **X** in the upper right to return to the user interface.

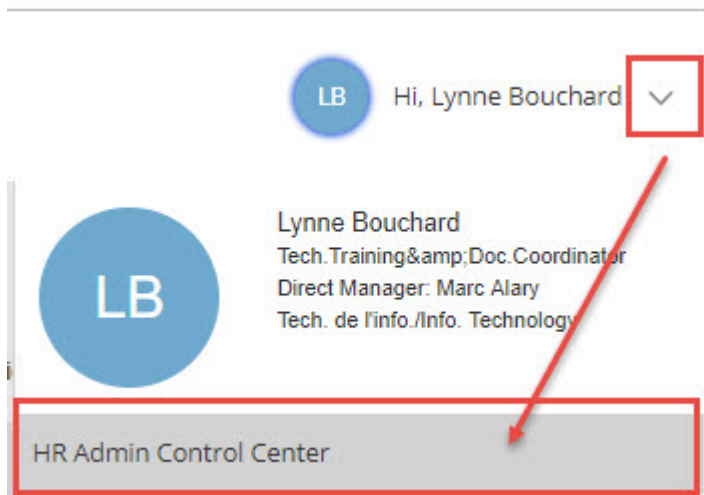


## The 2nd level supervisor

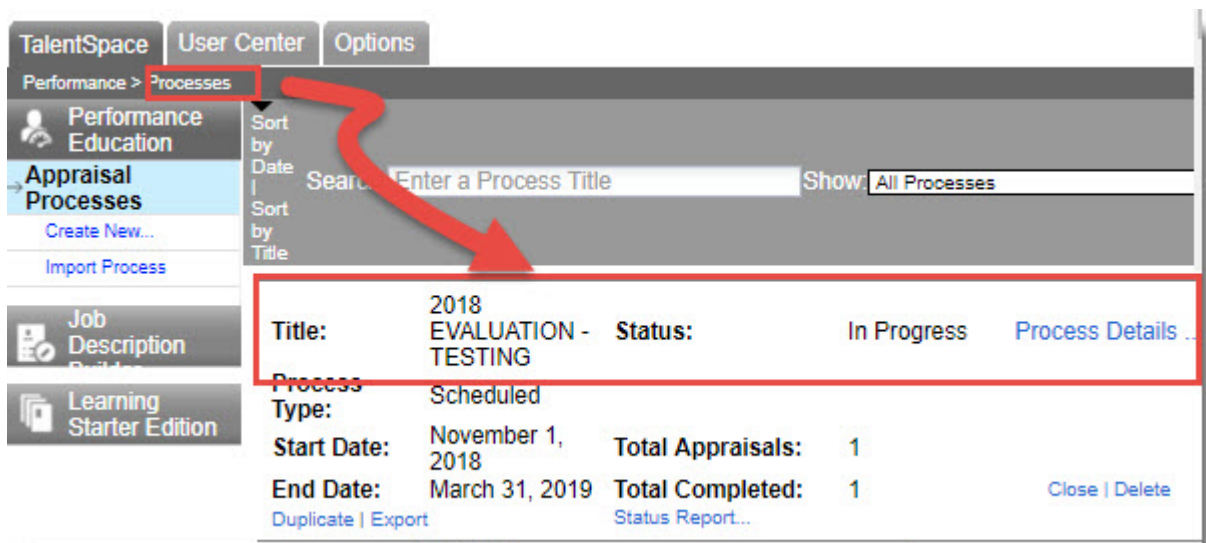
Some processes require that the 2nd level supervisor approves a form. The 2nd level supervisor can be modified to allow the completion of an ongoing process.

## Opening the *HR Admin Control Center*

1. Click **HR Admin Control Center** from the upper right corner of your screen.

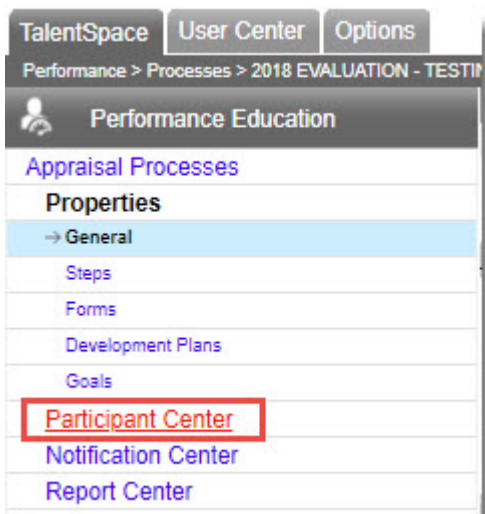


2. Select the process by clicking on **Process Details**.



## Opening the *Participant Center*

1. Click **Participant Center**.




## Assigning or removing the 2nd Level Supervisor

The HR administrator can assign or remove the 2nd level supervisor who is associated to an ongoing process. And although, the removal (Clear) option is possible, **it is not recommended** by HR.

1. Click **Status** from the **Appraisal** section.

Participant	Assigned			Appraisal		
	Manager	HR Rep	Form	Status	Self	Final
Bali-Courtemanche1, Suzanne1	✓	✓	Default	Status		
Boucher, Stéphane	✓	✓	Default	Status		
Demers, Joanne	✓	✓	EVAL_DEMAND			
Dupont, Xavier	x	✓	Default			
Gauvin, Hélène	✓	✓	Default			

2. Click .

 **Individual Appraisal Status**

Employee Name :	<b>Bali-Courtemanche1, Suzanne1</b>		
Manager/Evaluator :	<b>Boucher, Stéphane</b>		
E-Mail :			
2nd-Level Manager :	<input type="text" value="Demers, Joanne"/>	<input type="button" value="Change..."/>	<div><input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/></div>
3rd-Level Manager :	<input type="text" value="Dupont, Xavier"/>	<input type="button" value="Change..."/>	
4th-Level Manager :	<input type="text"/>	<input type="button" value="Change..."/>	
HR Rep:	<b>Markovinovic1, Irena1</b>		
Appraisal Form:	<b>Default</b>		
Last Appraisal Completed Date:	<b>01/04/2013</b>		
Last Interim Review Date:			
Employee Hire Date:	<b>02/16/2000</b>		
Last Promotion Date:			

3. Type the three first letters of the 2nd level supervisor's lastname in **Starts with** .

The screenshot shows a web browser window with the URL <https://ondemand.halogensoftware.com/?uid=1380743422017>. The page title is "Assign Approver". Below the title, a message states: "The results box displays only the first 50 persons matching the search criteria. To enter search criteria type the last name followed by a comma then first name." The interface is divided into two main sections: "Select a Person" and "Assign the Person". In the "Select a Person" section, there is a "Starts with:" label followed by a text input field containing "Mar" and a "Find" button. Below this is a list box containing the entry "Markovinovic1, Irena1". At the bottom of this section is a checkbox labeled "Show Email Address". In the "Assign the Person" section, there is a "Set as Approver >" button. To the right, under the heading "Approver is:", there is a text input field containing "Demers, Joanne" and a "Clear" button. At the bottom right of the window are "OK" and "Cancel" buttons.

4. Click **Find** .
5. Click on the supervisor's name.
6. Click on one of the following options:
- **Set as Approver** to add or modify the 2nd level supervisor.
  - **Clear** to remove the 2nd level supervisor's approval step (non recommended).




7. Click on **OK**.

The system display the new 2nd level supervisor's name.

Employer: **Bali-Courtemanche1, Suzanne1**  
 Manager: **Boucher, Stéphane**  
 E-Mail:   
 2nd-Level: **Markovinovic1, Irena1** **Change...**  
 3rd-Level: **Dupont, Xavier** **Change...**  
 4th-Level: **Boucher, Stéphane** **Change...**

HR Rep: **Markovinovic1, Irena1**  
 Appraisal: **GOALSETTING2013 - 2013 Goal Setting Form**  
 Last Appraisal Date: **01/04/2013**  
 Last Interview Date:   
 Employment Date: **02/16/2000**  
 Last Promotion:   
 Set to Progress

Task Step	Status	Completion (mm/dd/yyyy)	Person Responsible	Mark Step Complete
Employee writes goals	In Progress	N/A	Bali-Courtemanche1, Suzanne1	<b>Complete</b>
Supervisor reviews and finalizes goals for reports	Not Ready	N/A	Boucher, Stéphane	
Supervisor signs off	Not Ready	N/A	Bali-Courtemanche1, Suzanne1	

 Information: Click information when placing your mouse over this icon.

**Complete**  
**OK**

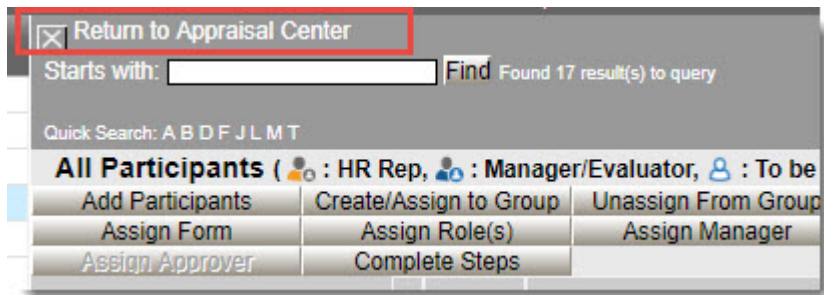
**Prevent Updates:**  
☐ checked items will not be updated  
☐ the hierarchy in the User Center - e  
☐ when using the 'Update Relationship' button

8. Click on **OK**.

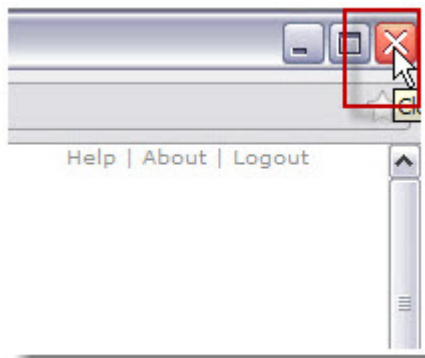


## Returning to the user interface

1. Click [Return to Appraisal Center](#).



2. Click on the [X](#) in the upper right to return to the user interface.





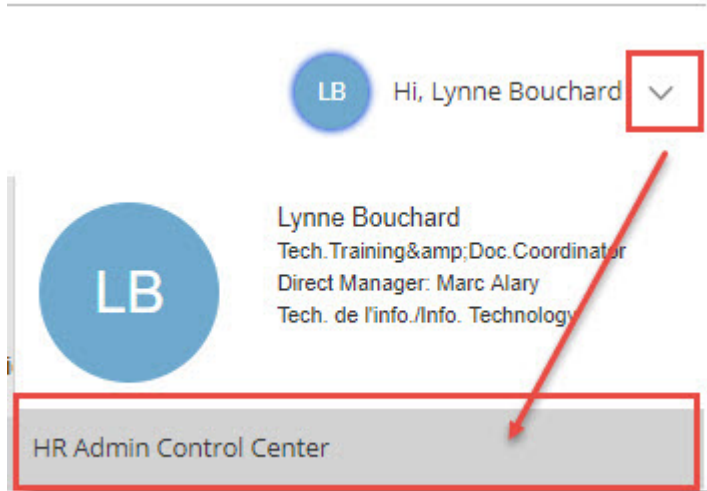
# The Notification Center

## The *Notification Centre*

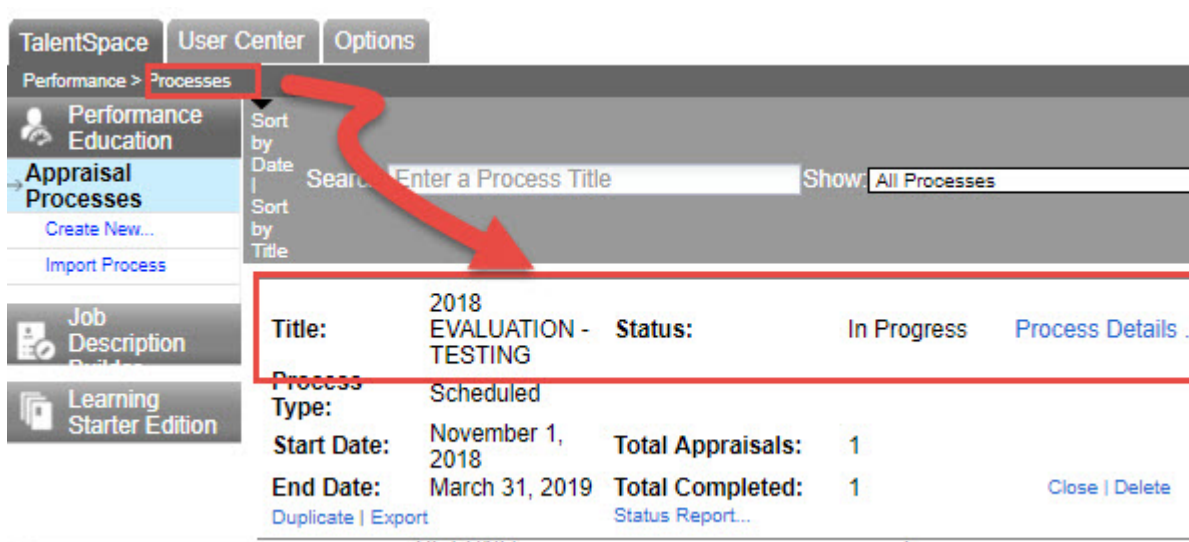
The *Notification Center* is used to create and configure the reminder and warning messages. The HR Administrator can browse all the messages that have been created for an ongoing process but he/she cannot modify them.

### Opening the *HR Admin Control Center*

1. Click **HR Admin Control Center** from the upper right corner of your screen.

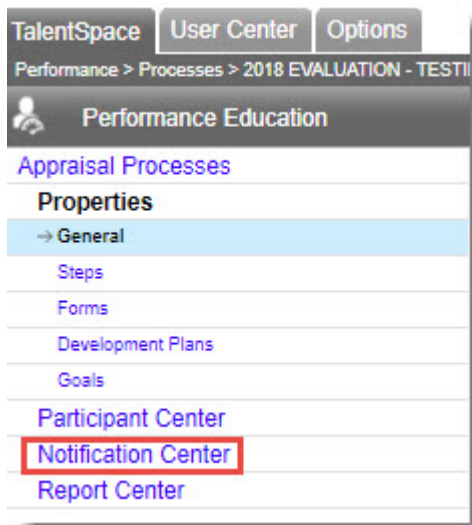


2. Select the process by clicking on [Process Details](#).



## Notification Center

1. Click [Notification Center](#).



2. Browse the configuration of the automated reminders. You cannot modify make any modification.

3. Click on the X of [Return to Appraisal Center](#) to return to the list of processes.

☒ Save Changes
 ☐ Return to Appraisal Center

### Notification Center

Process Title: **2018 EVALUATION - TESTING**

**Individual Reminders**  
Send a notification message to selected person(s).

**Automatic Reminders**  
Automatic reminders apply to the Appraisal Steps.  
Reminders are sent to all participants who meet the condition(s) specified below.

Condition	Remind on: (Check to enable)
<b>Not Started</b> Participant has not entered the process yet. (An invitation message with a link to their task page and a reminder of their password is appropriate).	<input checked="" type="checkbox"/> Start date <input type="checkbox"/> Then every <input type="text" value="7"/> day(s).
<b>Normal</b> Participant is expected to complete one or several tasks and ample time is available.	<input type="checkbox"/> First day with a task <input type="checkbox"/> Then every <input type="text" value="2"/> day(s).
<b>Approaching Due Date</b> Participant still has tasks to complete but is approaching the due date for some tasks.	<input checked="" type="checkbox"/> <input type="text" value="30"/> day(s) before task becomes past due. <input type="checkbox"/> Then every <input type="text" value="2"/> day(s).
<b>Past Due</b> Participant is late completing one or several tasks according to the process calendar.	<input checked="" type="checkbox"/> First day after due date <input type="checkbox"/> Then every <input type="text" value="1"/> day(s). <input type="checkbox"/> Send message to participants' managers



# The Report Center

## The Report Center

The HR Administrators can produce statistical reports using the Halogen **Report Center**. The **Report Center** is the best way for them to ensure that the employees/supervisors of their unit begin and complete the processes during the expected periods.

The HR Administrators have access to all reports of the **Report Center** for all ongoing processes, but always for the data concerning their designated faculty/service.

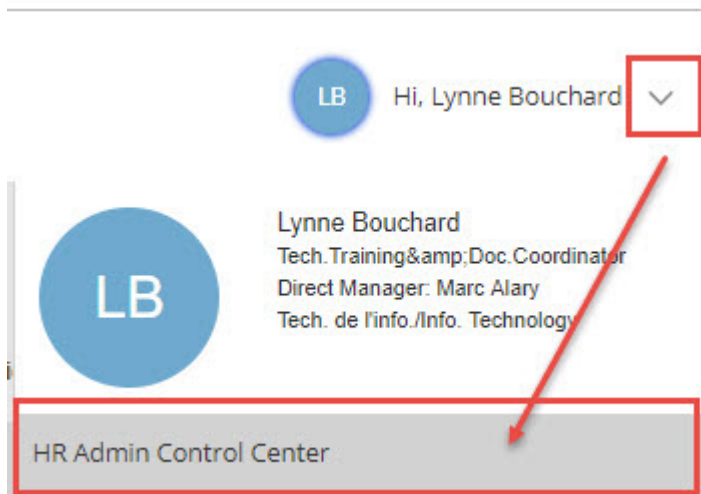
The **option NOTIFY** in the Report Center, sends automated reminders to specific employees and the sender's email address is always performance@uottawa.ca. Therefore, the HR Administrators must avoid using the **NOTIFY** option because the employees of their respective unit will not know that the message has been sent by their HR Administrator and if they reply, the message will be sent to central HR performance@uottawa.ca inbox. This way of notifying is strongly discouraged.



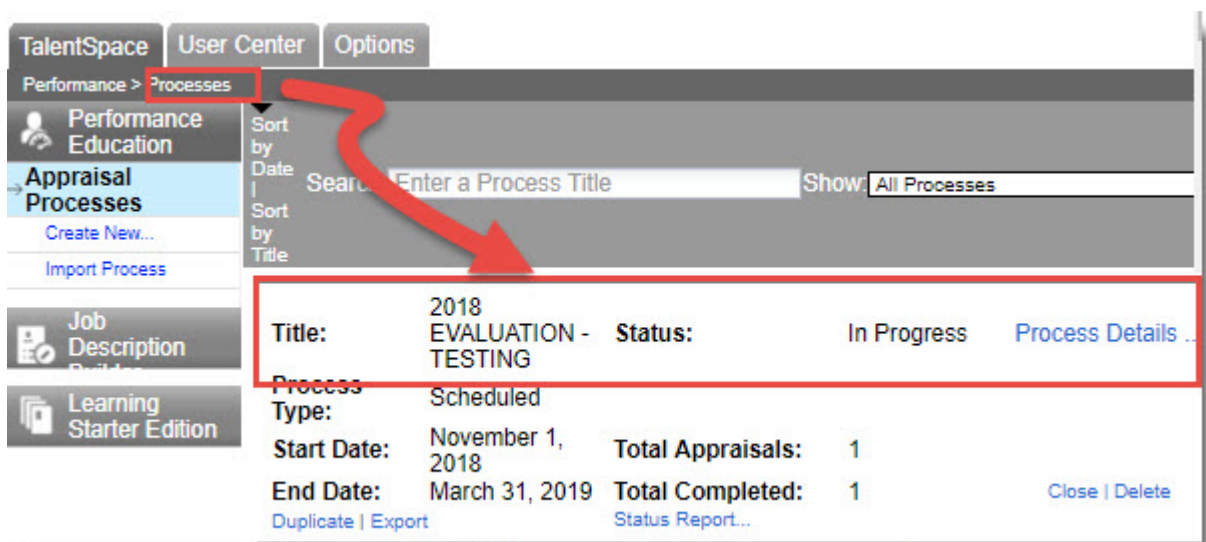
## The Detailed Status

The **Detailed Status** report gives the number and percentage of employees that have completed or not each process step of an ongoing process.

1. Click **HR Admin Control Center** from the upper right corner of your browser.



2. Select the process by clicking on **Process Details**.





3. Click on [Detailed Status](#).



4. (Optional) Select the field on which you want to filter the report using the scroll list  
 User Field scroll list of the Overall Status section.

### Detailed Status

Process: **ANNUAL PERFORMANCE EVALUATION - ON DEMAND**

Status On: 10/03/2013 (mm/dd/yyyy)

#### Overall Status

Show: ☐ All ☐ Group  ☒ User Field Department

Human Resources

General Status: **0% complete**

Total Appraisals to Complete:	2	Number of Non-Managers:	1
Total Completed:	0 (0%)	Number of Managers:	4
Incomplete:	2 (100%)	Number of HR Representatives:	1

#### Progress Against Defined Appraisal Steps

Appraisal Step	Due Date mm/dd/yyyy	Completed this step			Appraisals Currently In This Step <small>Red indicates one or more steps are past due.</small>			
		Number	%	Report	Number	%	Report	Notify
Employee writes self-evaluation	12/31/2013	1	(50%)		1	(50%)		
Manager writes employee evaluations	12/31/2013	1	(50%)		0	(0%)		
Employee sign-off	12/31/2013	0	(0%)		1	(50%)		
Second level manager sign-off	12/31/2013	0	(0%)		0	(0%)		
HR Administrator sign-off	12/31/2013	0	(0%)		0	(0%)		

- a. (Optional) Click  to select the report parameters to filter your data.
- b. (Optional) Select the value of the selected field.

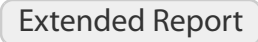
https://ondemand.halogensoftware.com

### User Field Selection

Department:

-no entry-  
Human Resources  
RH/HR

100%

- 
5. Click on  in order to be able to print or export the report.

6. (Optional) Click on **Expand All** if you want to view the detailed version of this report.

https://ondemand.halogensoftware.com/ - Halogen Software - Windows Internet Explorer

**ANNUAL PERFORMANCE EVALUATION - ON DEMAND** 10/03/2013

### Extended Detailed Status

Print  
Update Now  
Export

Show: ☐ All ☐ Group  ☒ User Field  Department  =

**Human Resource:** **Select**

**General Status:** 0% complete

<b>Total Appraisals to Complete:</b>	2	<b>Number of Non-Managers:</b>	1
<b>Total Completed:</b>	0 (0%)	<b>Number of Managers:</b>	4
<b>Incomplete:</b>	2 (100%)	<b>Number of HR Representatives:</b>	1

Appraisal Step					Due Date	Completed this step		Appraisals Currently In This Step <small>Red indicates one or more appraisals are past due</small>	
					mm/dd/yyyy	Number	%	Number	%
▼ Employee writes self-evaluation					12/31/2013	1	(50%)	1	(50%)
	<b>Employee</b>	<b>Evaluator</b>	<b>Manager</b>	<b>2nd Manager</b>	<b>Due Date</b> mm/dd/yyyy	<b>Status</b>			
1	Bali-Courtemanche1, Suzanne1	Bali-Courtemanche1, Suzanne1	Boucher, Stéphane	Demers, Joanne	12/31/2013	In Progress			
2	Boucher, Stéphane	Boucher, Stéphane	Demers, Joanne	Dupont, Xavier	12/31/2013	Completed			
▼ Manager writes employee evaluations					12/31/2013	1	(50%)	0	(0%)
	<b>Employee</b>	<b>Evaluator</b>	<b>Manager</b>	<b>2nd Manager</b>	<b>Due Date</b> mm/dd/yyyy	<b>Status</b>			
1	Boucher, Stéphane	Demers, Joanne	Demers, Joanne	Dupont, Xavier	12/31/2013	Completed			
▼ Employee sign-off					12/31/2013	0	(0%)	1	(50%)
	<b>Employee</b>	<b>Evaluator</b>	<b>Manager</b>	<b>2nd Manager</b>	<b>Due Date</b> mm/dd/yyyy	<b>Status</b>			
1	Boucher, Stéphane	Boucher, Stéphane	Demers, Joanne	Dupont, Xavier	12/31/2013	In Progress			
Second level manager sign-off					12/31/2013	0	(0%)	0	(0%)
HR Administrator sign-off					12/31/2013	0	(0%)	0	(0%)

Inactive User

Expand All  
Collapse All  
Close

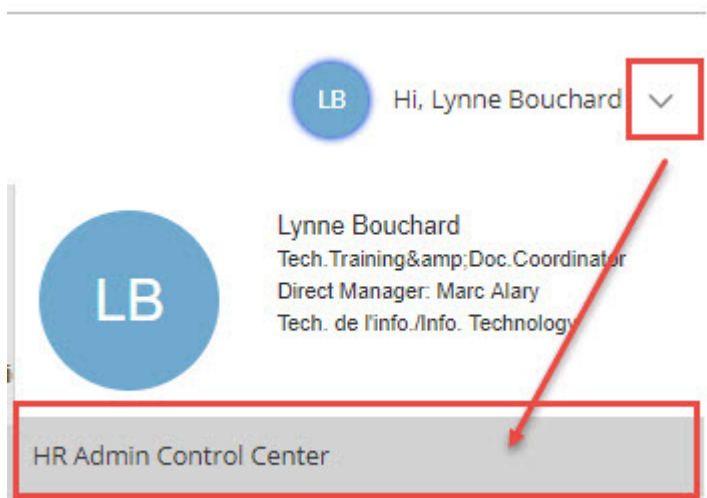
- a. Click **Collapse All** to remove the employee names.

7. Click on one of the following options:
  - [Print](#) to print a paper copy of the report
  - [Export](#) to export the report to Excel
  - [Close](#) to close the report
8. Click [Return to Appraisal Center](#).

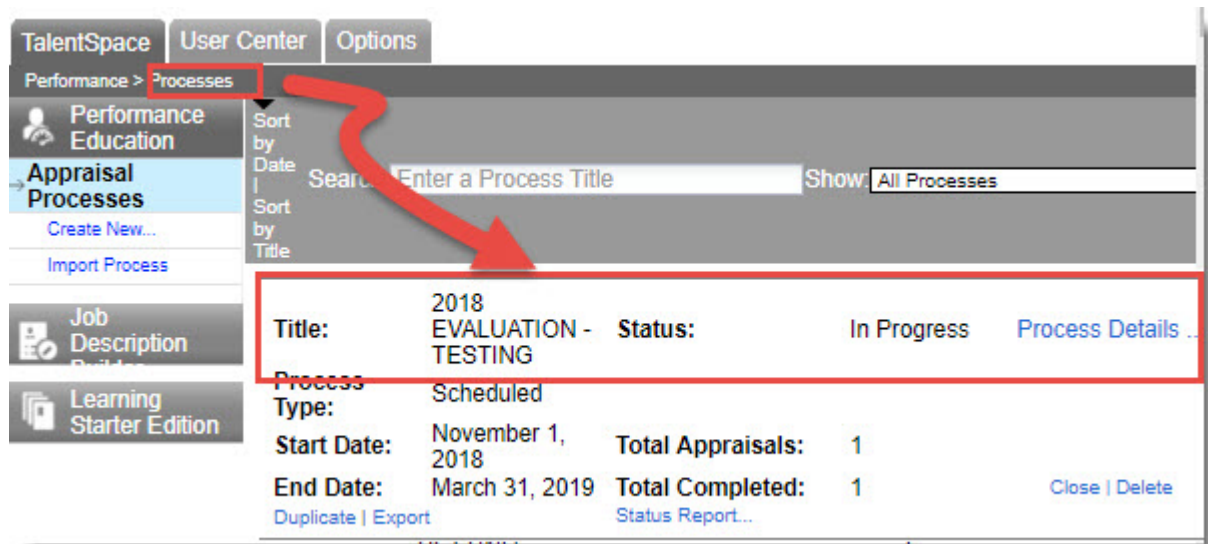
## The Group Scores report

You can use the [Group Scores](#) report to output the list of employees with the given score on any selected competency or output a list of employees with the overall score of all competencies.

1. Click [HR Admin Control Center](#) from the upper right corner of your browser.



2. Select the process by clicking on [Process Details](#).



The screenshot shows the TalentSpace interface with the 'Processes' tab selected. The left sidebar contains navigation links: Performance > Processes, Performance Education, Appraisal Processes (highlighted), Job Description Builder, and Learning Starter Edition. The main content area displays a list of processes. A red box highlights the 'Appraisal Processes' section, and a red arrow points to the 'Process Details' link for the '2018 EVALUATION - TESTING' process.

Title:	2018 EVALUATION - TESTING	Status:	In Progress	<a href="#">Process Details</a>
Process Type:	Scheduled			
Start Date:	November 1, 2018	Total Appraisals:	1	
End Date:	March 31, 2019	Total Completed:	1	<a href="#">Close</a>   <a href="#">Delete</a>
<a href="#">Duplicate</a>   <a href="#">Export</a>		<a href="#">Status Report...</a>		

3. Click [Group Scores](#).



The screenshot shows the 'Report Center' dropdown menu. The 'Detailed Status' option is selected, and the 'Group Scores' option is highlighted.

- Report Center**
  - Detailed Status
  - [Group Scores](#)
  - [Competency Rating](#)
  - [On Time Reports](#)
  - [Development Plan](#)
  - [Goals](#)
  - [Export Responses](#)
  - [Word Cloud](#)

4. Select **English** or **French** .

☒ Return to Appraisal Center

### Group Scores

#### Report Options

Overall Score includes

Manager Overall Score	<input type="text" value="100"/> %
Employee Self-Overall Score	<input type="text" value="0"/> %

#### Groups

**English**

French

Forms are assigned to employees by their language of preference. Therefore you need to select one language to be able to obtain the list of competencies in the next step.

2012 EVALUATION

12/05/2013

## Group Scores

Group:

English

User Field Filter:

Department

Select

Competency:

Client service orientati

Overall Score:

Less than or equal to

2

Include Incomplete Results:

No

No. of Reported Members:

1

Update Report

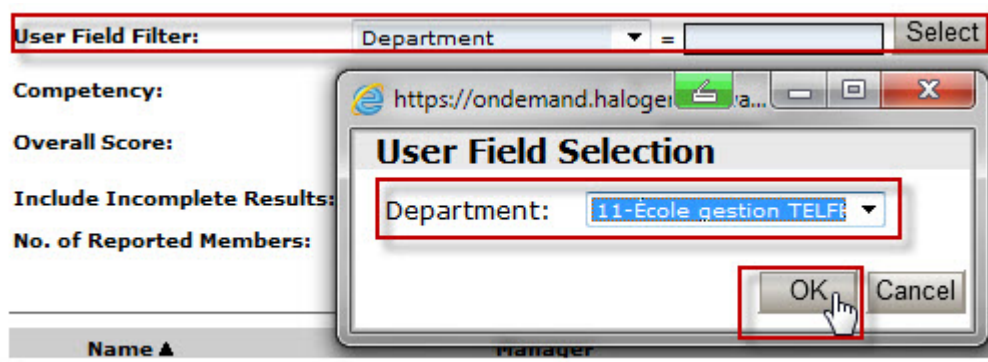
Export

	Name ▲	Manager	Score
1			2
	Average		2

Close



5. (Optional) Click **User Field Filter** and select the user field to output a group of employees. For example, select department if you need the information for a specific department.
  - a. Click **Select** to obtain a list of values (for example, list of departments if you have selected department at the previous step).
  - b. Select the value (for example the department name).
  - c. Click **OK**.



6. Select the **competency**.  
 If you have selected English to verify the competency score of employees that have filled the English Form, please ensure to select the competency written in English otherwise you will obtain no results.





7. Select the **overall score** filter.
  - a. Enter the value in the box.

**Overall Score:**

**Include Incomplete Results:**

**No. of Reported Members:**

Less than or equal to  
--All--  
Equal to  
Greater than  
Greater than or equal to  
Less than  
Less than or equal to

2

8. Click on **Update Report**.
9. Click on **Export**.

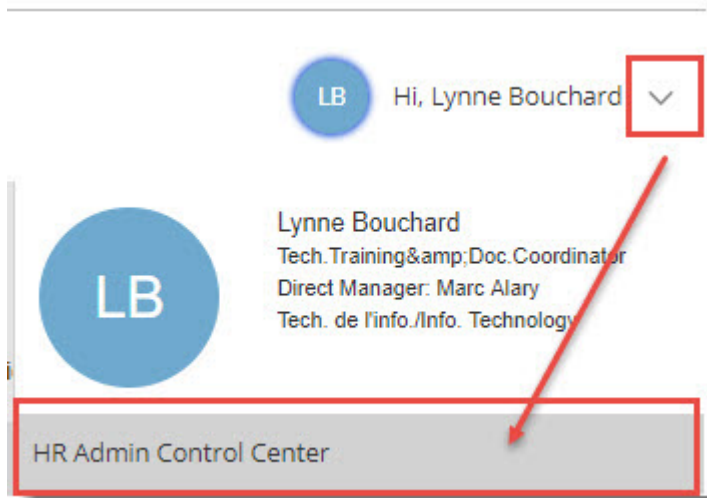
	A	B	C	D
1		<b>Name</b>	<b>Manager</b>	<b>Score</b>
2	1			2
3		<b>Average</b>		2
4				
5				

10. Click on **Return to Appraisal Center**.

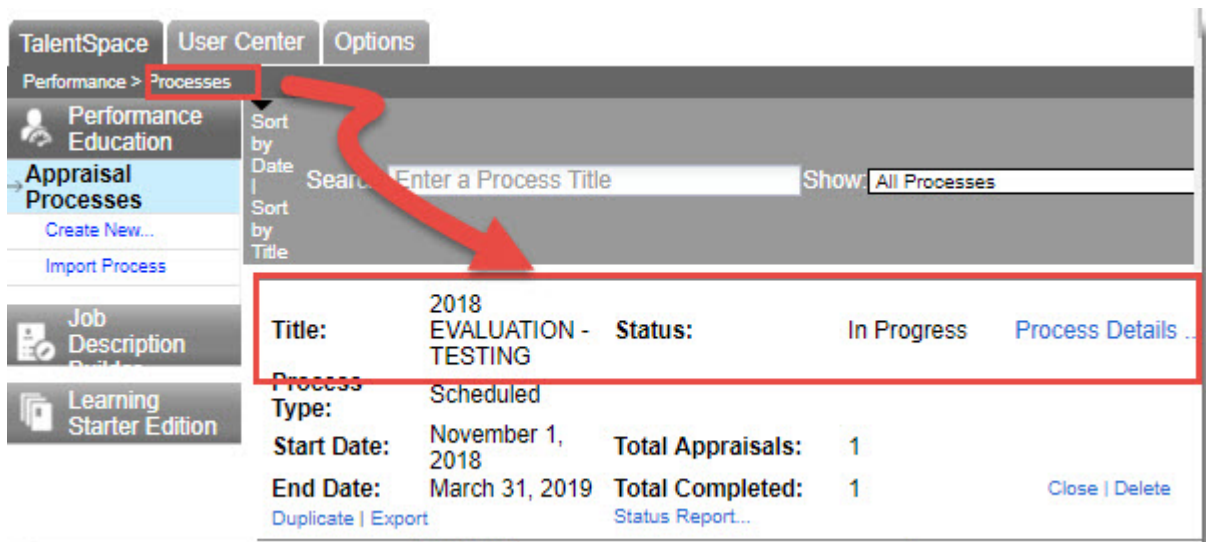
## The Competency Rating

The **Competency Rating** report outputs the percentage of employees that have been evaluated on each competency in relation with the score that they obtained. The report can be exported to Excel.

1. Click **HR Admin Control Center** from the upper right corner of your browser.



2. Select the process by clicking on **Process Details**.



3. Click **Competency Rating**.



4. Click on the competency name or click on **ALL** to select the group of competencies.

☒ Return to Appraisal Center

## Competency Rating Report

▼ Display Options

Add at least one competency:  
Available Competencies:

{All}

Client service orientation

Initiative

Planification

Planning

Service à la clientèle

Teamwork and cooperation

Travail d'équipe et coopération

Add >

< Remove

Selected Competencies:

Client service orientation

Initiative

Planification

Planning

Service à la clientèle

Teamwork and cooperation

Travail d'équipe et coopération

User Field: Faculty or Service = Human Resources **Select**

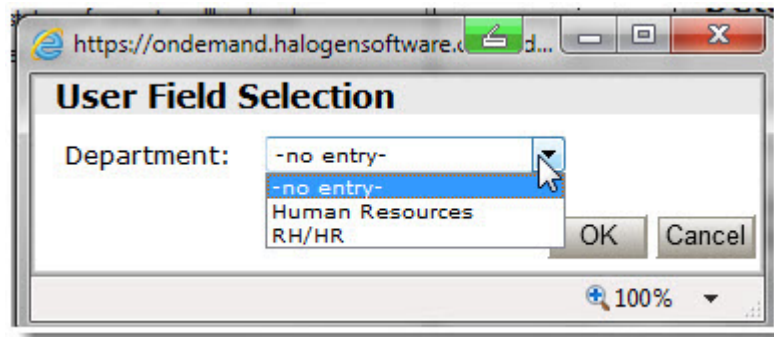
**Update Report** **Export**

Employee Information: Faculty or Service	Competency	Number of Responses	On Time	Rating			
				Lowest-	-	-	Highest
Human Resources	Employee Count	0	0.0%	-	-	-	-
	Client service orientation	0	N/A	-	-	-	-
	Initiative	0	N/A	-	-	-	-
	Planification	0	N/A	-	-	-	-
	Planning	0	N/A	-	-	-	-
	Service à la clientèle	0	N/A	-	-	-	-
	Teamwork and cooperation	0	N/A	-	-	-	-
	Travail d'équipe et coopération	0	N/A	-	-	-	-

To select more than one competency at the same time, press on the SHIFT key of the keyboard and click on the other competencies.

5. Click on one of the following options:
- Add** to add the selected competencies
  - Remove** to remove the competencies in the **Selected Competencies** section.

6. (Optional) Select a field to filter your report using the **User Field** scroll list.
  - a. (Optional) Click **Select** to select the report parameters used to filter your report.
  - b. (Optional) Select the value of the selected field.

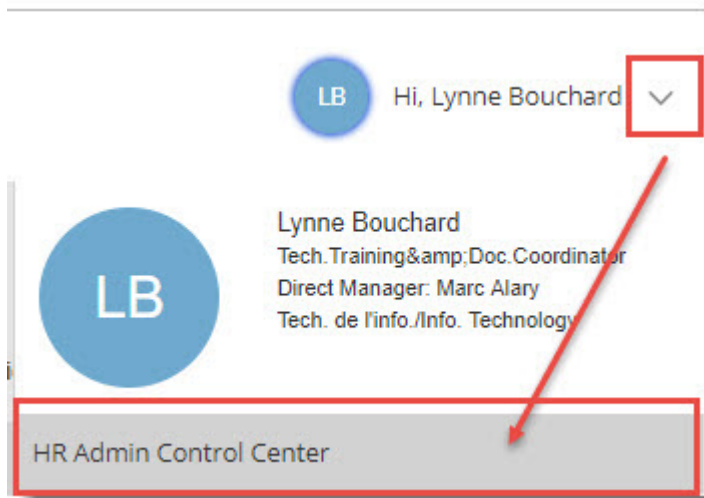


- c. (Optional) Click **OK**.
7. Click on **Update Report**.
8. Click on **Export** to export the report to Excel.
9. Click on **Return to Appraisal Center**.

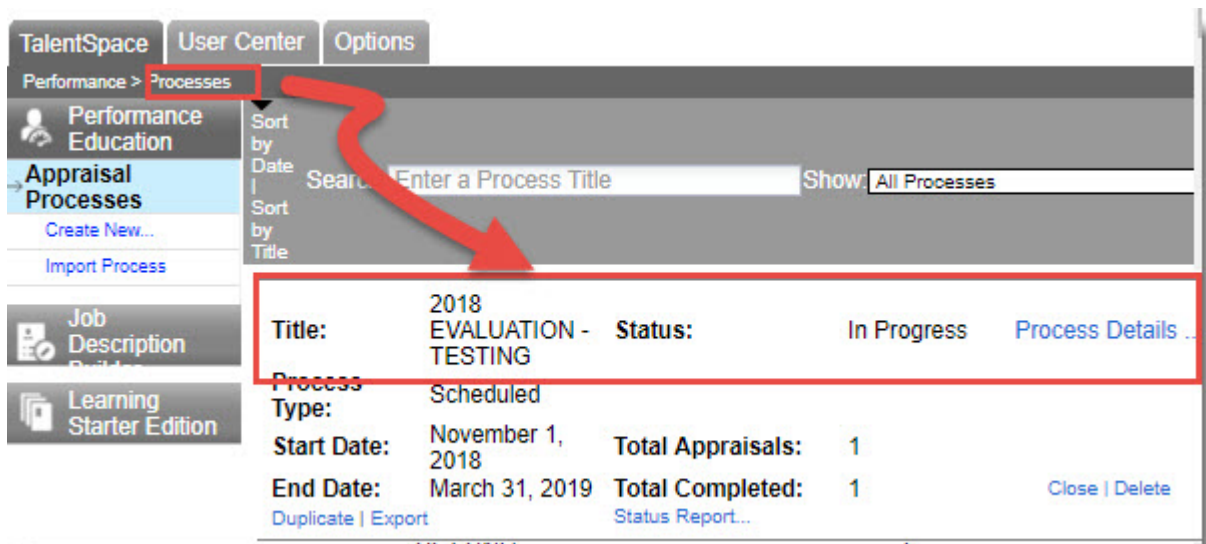
## The On Time report

The **On Time Reports** allows you to see the number of employees that have completed the different steps of the selected ongoing process. The report can be exported to Excel.

1. Click **HR Admin Control Center** from the upper right corner of your browser.



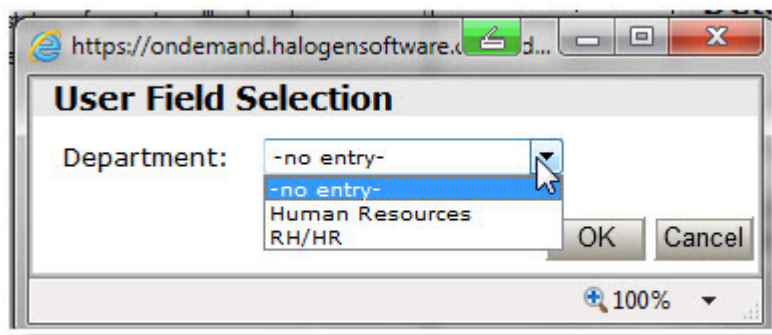
2. Select the process by clicking on **Process Details**.



3. Click **On Time Reports**.



4. (Optional) Select a field to filter your report using the **User Field** scroll list of the **Overall Status** section.
- (Optional) Click on **Select** to select the report parameters to filter the report.
  - (Optional) Select the value of the selected field.



- c. (Optional) Click **OK**.

5. Click **Update Now** to reexecute the report after selecting the report parameters.

☐ Return to Appraisal Center

## On Time Reports

Process: **ANNUAL PERFORMANCE EVALUATION - ON DEMAND**

Status On: 10/03/2013  
(mm/dd/yyyy)

**Update Now**  
**Export**

### Overall Status

Show: ☒ All ☐ Group  ☐ User Field  =

**Select**

General Status: **0% complete**

Total Appraisals to Complete: **2**

Total Completed: **0 (0%)**

Incomplete: **2 (100%)**

### Status by Appraisal Step

Show: ☒ Completed Appraisals ☐ Completed and Past Due Appraisals

Appraisal Step	Total	Completed On Time		Not Completed On Time		
	Number	Number	%	Number	%	Report
Employee writes self-evaluation	0	0	(0%)	0	(0%)	
Manager writes employee evaluations	0	0	(0%)	0	(0%)	
Employee sign-off	0	0	(0%)	0	(0%)	
Second level manager sign-off	0	0	(0%)	0	(0%)	
HR Administrator sign-off	0	0	(0%)	0	(0%)	

6. Click **Export** to export the report to Excel.

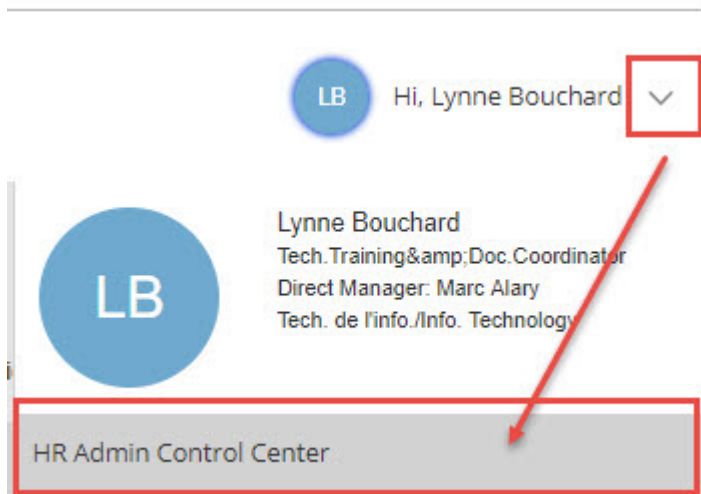
7. Click **Return to Appraisal Center**.



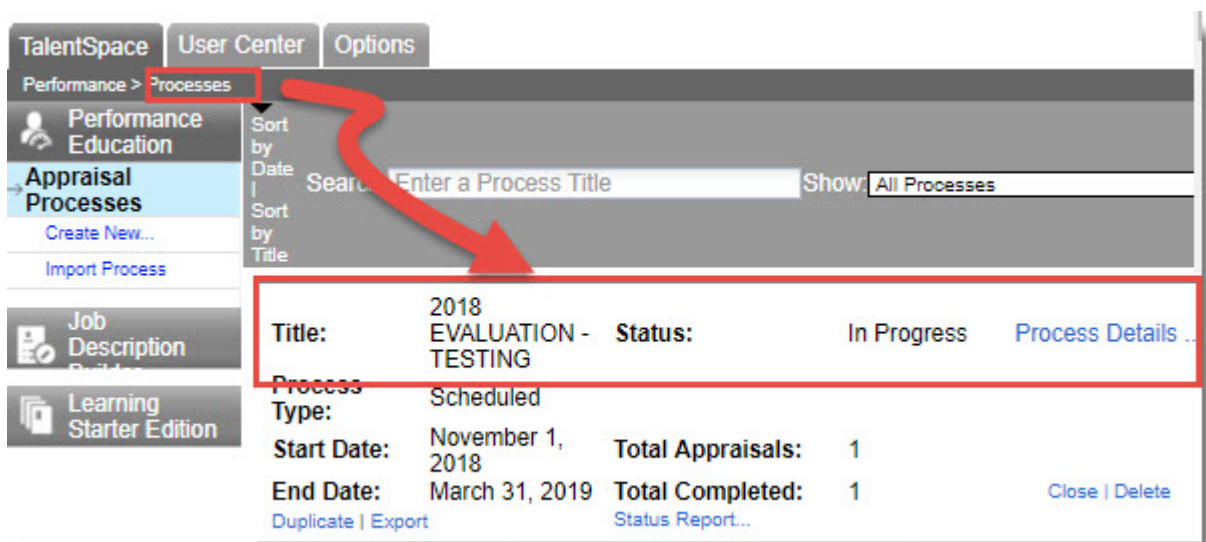
## The Development Plan Report

The **Development Plan** report can be used to produce a list of employees that have entered a development plan in their form. The report can be exported in Excel.

1. Click **HR Admin Control Center** from the upper right corner of your browser.



2. Select the process by clicking on **Process Details**.



3. Click **Development Plan**.

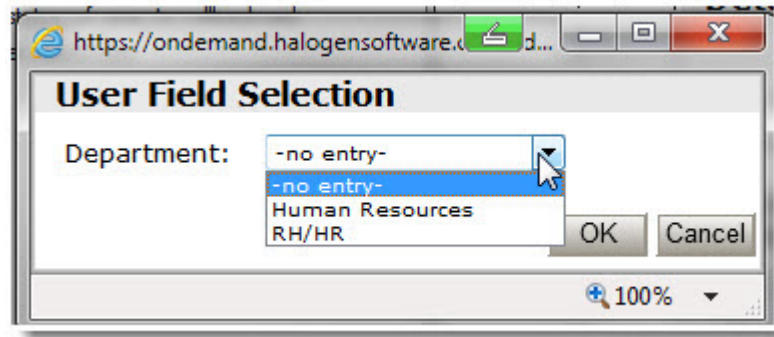


4. Select one of the following options to sort the data:

A screenshot of a 'Development Plan Report' form. The form has a grey header bar with a close button (X) and the text 'Return to Appraisal Center'. Below the header, the title 'Development Plan Report' is displayed. Under the title, there is a 'View Report' button. The 'Sort By' section has two radio buttons: 'Title' and 'Individual', with 'Individual' selected. The 'Report Filter' section has three radio buttons: 'All', 'Group:', and 'User Field'. The 'All' radio button is selected. The 'Group:' radio button has a dropdown menu. The 'User Field' radio button has a dropdown menu showing 'Job Title' and an equals sign followed by a text input field and a 'Select' button. The 'Category Filter' section has a dropdown menu showing '--All--'.

- **Title** to sort the report by the development plan title name given by the employee
- **Individual** to sort the report by the employee name

5. (Optional) Select the field on which you want the report filtered using the **User Field** scroll list of the **Overall Status** section.
  - a. (Optional) Click **Select** to select the parameters to filter the report.
  - b. (Optional) Select the value of the selected field.



- c. (Optional) Click on **OK**.
6. Click on **View Report** to print or export the report.

7. Click on one of the following options:

- **Export** to export the report in Excel
- **Close** to close the report

Close Export

**ANNUAL PERFORMANCE EVALUATION - ON DEMAND** 10/04/2013

## Development Plan

No records found

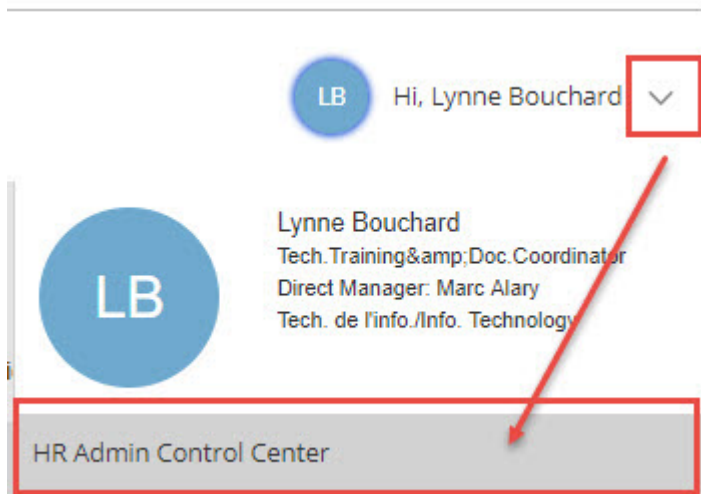
Other Develop ment Plan Entries	Description	Created Date	Competency	Employee Name
1	- Maximiser mes connaissances des services dis	03/21/2013		
2	-Continue working on facilitation skills - On-go	03/31/2013		
3	Title:"Shadowing" avec les facultésPasser du te	03/25/2013		
4	Title:-Enhancing the student experience from C	03/28/2013		
5	Title:1- Participer à une conférence sur la qualit	03/07/2013		
6	Title:1. Management and Professional Advance	03/25/2013		
7	Title:1. Poursuivre ou compléter ma maîtrise en	03/28/2013		
8	Title:2- Participer à la formation « Gestion de ré	03/07/2013		
9	Title:2. Assister aux présentations données pen	03/28/2013		
10	Title:2013 Plan: Attend the April 2013 CAGP con	03/26/2013		
11	Title:360Mettre en place de nouveaux comporte	03/29/2013		

8. Click **Return to Appraisal Center**.

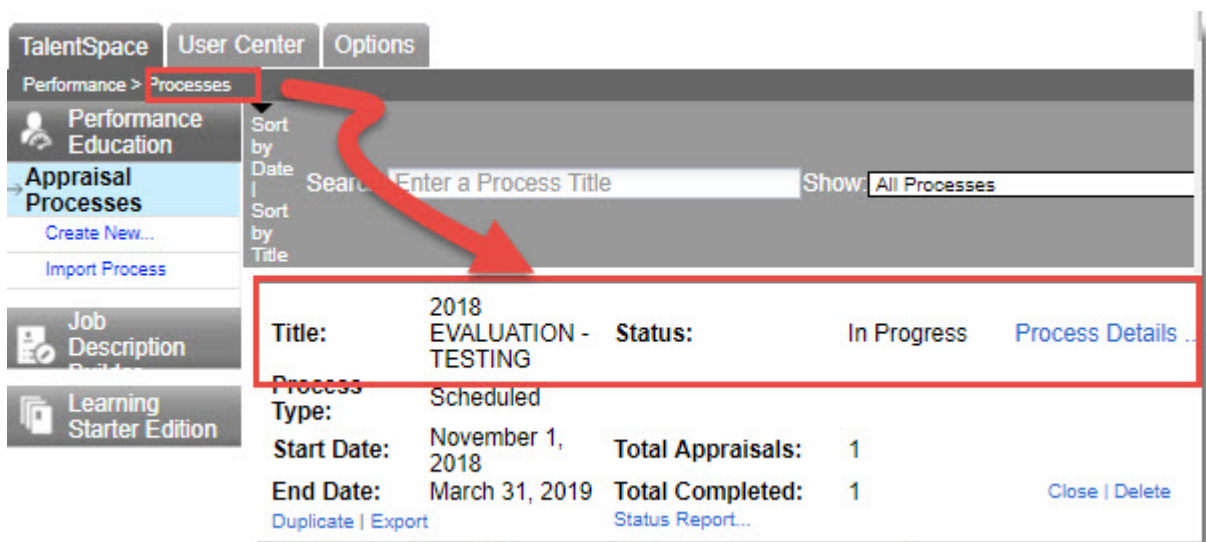
## The Goals report

The **Goals** report allows the user to produce a list of goals that have been linked to at least one organizational goal. This report can be exported to Excel.

1. Click **HR Admin Control Center** from the upper right corner of your browser.



2. Select the process by clicking on **Process Details**.







3. Click **Goals**.



4. Select one **Corporate Goals** to obtain the list of the individual goals that have been entered by the employees of your unit that were linked to selected organizational goal from the **Corporate Goals** section.

Employees with Matching Goals				
Employee Name (Supervisor Name)	Goal	Status	Flag	Percent Complete
	Stratégies et outils de communication	In Progress		50%
	2) Trouver trois nouvelles initiatives de recrutement et les mettre en place pour le cycle 2014	En cours		100%
	Communiquer avec la gestionnaire des opérations pour informer de la charge de travail	En cours		100%
	Annotation des dossiers et listes			0%
	Établir un plan travail pour faire une validation des dossiers de retraite (Audit)	En cours		75%
	Modifier et/ou intégrer une lettre au relevé du calcul	En cours		70%
	Update H&S website to comply with Accessibility for Ontarians with Disabilities Act (AODA)			0%

5. Select the report fields to display in the **Display Options** .

Employees with Matching Goals				
Employee Name (Supervisor Name)	Goal	Status	Flag	Percent Complete
	Stratégies et outils de communication	In Progress		50%
	2) Trouver trois nouvelles initiatives de recrutement et les mettre en place pour le cycle 2014	En cours		100%
	Communiquer avec la gestionnaire des opérations pour informer de la charge de travail	En cours		100%
	Annotation des dossiers et listes			0%
	Établir un plan travail pour faire une validation des dossiers de retraite (Audit)	En cours		75%
	Modifier et/ou intégrer une lettre au relevé du calcul	En cours		70%
	Update H&S website to comply with Accessibility for Ontarians with Disabilities Act (AODA)			0%

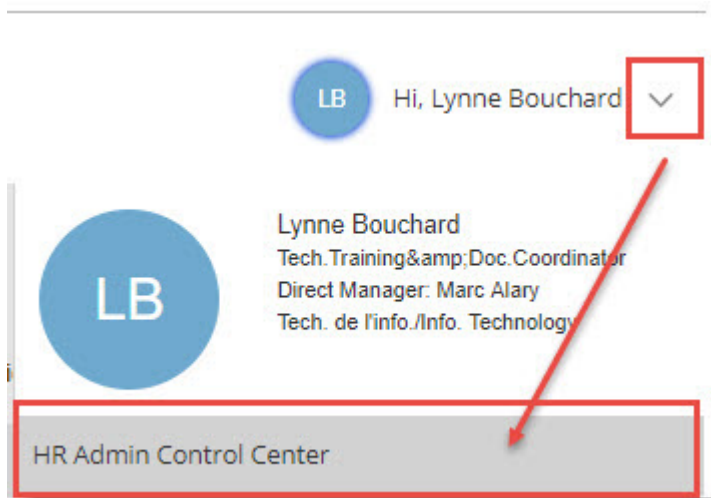
6. Click on one of the following options:
- **Print** to print a paper copy of the report
  - **Export** to export the report to Excel
  - **Close** to close the report
7. Click **Return to Appraisal Center** .



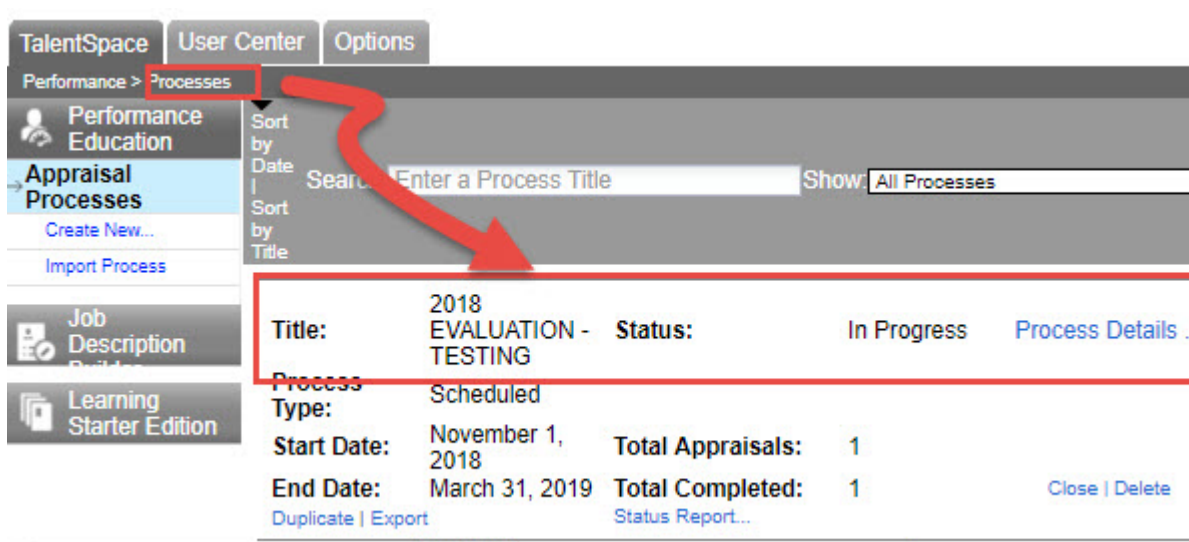
## Export Response report

**Detailed Status** makes it possible to export data as a text file (.txt) that can then be opened in Excel. This report provides participant names and the status of each step of the process selected.

1. Click **HR Admin Control Center** in the upper right-hand corner of the window.



2. Select the process by clicking on **Process Details**.





3. Click [Export Responses.](#)



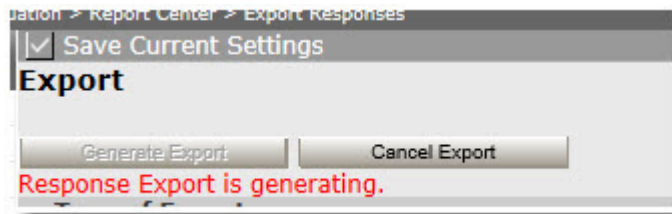
4. Select **Appraisal Step Status Export** in the **Type of Export** section.

The screenshot shows the 'Export Responses' interface with the following sections and annotations:

- Header:** Processes > 2014 Evaluation > Report Center > Export Responses
- Buttons:** ☒ Save Current Settings, ☐ Return to Appraisal Center
- Export Section:**
  - Generate Export** (button)
  - Cancel Export** (button)
  - Type of Export:**
    - ☐ Form Section Response Export
    - ☐ Subject Information Export
    - ☒ **Appraisal Step Status Export** (highlighted with a red box)
  - Data for Export:**
    - ☒ **Export all statuses** (highlighted with a red box)
    - ☐ Export only selected statuses
      - Status of steps to include:
        - ☐ Completed
        - ☐ Not Started
        - ☐ Past Due
        - ☐ In Progress
        - ☐ Approaching Due
        - ☐ Pending Approval
  - Employee Identification Field:**
    - Subject User Center Data:**
      - Last Name, First Name Middle Initial
      - Username
      - Employee ID
      - Salutation
      - Last Name
      - Middle Initial
    - Selected Export Data:**
      - Last Name, First Name Middle Initial (UC)
      - Employee ID (UC)
      - Job Title (UC)
      - Job Code (UC)
      - User Center Manager Name (UC)
      - User Center HR Rep Name (UC)
    - Annotations:**
      - Red arrows point from the 'Generate Export' button to the 'Appraisal Step Status Export' radio button, from the 'Export all statuses' radio button to the 'Status of steps to include' section, and from the 'Save Current Settings' button to the 'Appraisal Step Status Export' radio button.
      - A red box highlights the 'Add >' button in the 'Employee Identification Field' section.
      - A red box highlights the 'Selected Export Data' list.
      - Blue arrows labeled 'Move Up' and 'Move Down' are next to the 'Selected Export Data' list.
  - Export Filter:**
    - ☒ None
    - ☐ Group: English
    - ☐ User Field: Job Title = [ ] Select
    - Completed step: None
    - Response types to export: Manager Appraisal
  - Export File:**
    - ☒ **Save Current Settings** (highlighted with a red box)
    - ☐ Return to Appraisal Center

5. Hold down the CTRL key while clicking on each variable (column) you want to appear in the report.  
The selected variables will be highlighted in blue.
6. Click **Add** to move all variables to the **Selected Export Data** box.

7. Click **Save Current Settings** to save your report settings.
8. Click **Generate Report**.  
The **Response Export is generating** message will appear to indicate the system is compiling the text report.



9. Click **OK** when **The export has completed** message appears.
10. Click **Export Results in the** **Export File** section.
11. Click **Save** and then **Save As**.
12. Select the directory where you want to save the file.
13. (Optional) Enter a report name in the **File Name**.
14. Click **Save**.

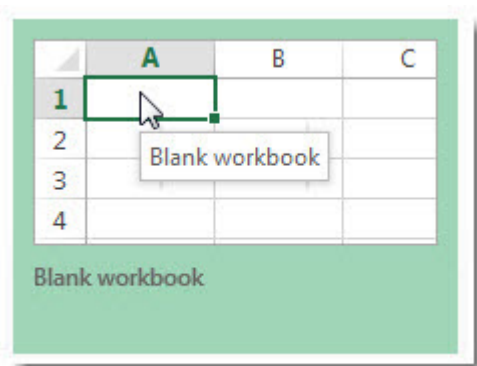
## Excel and reports created as text (.txt) files

Halogen allows you to create reports in text format (.txt) that can then be opened by Excel. Follow these steps to open the file created by Halogen.

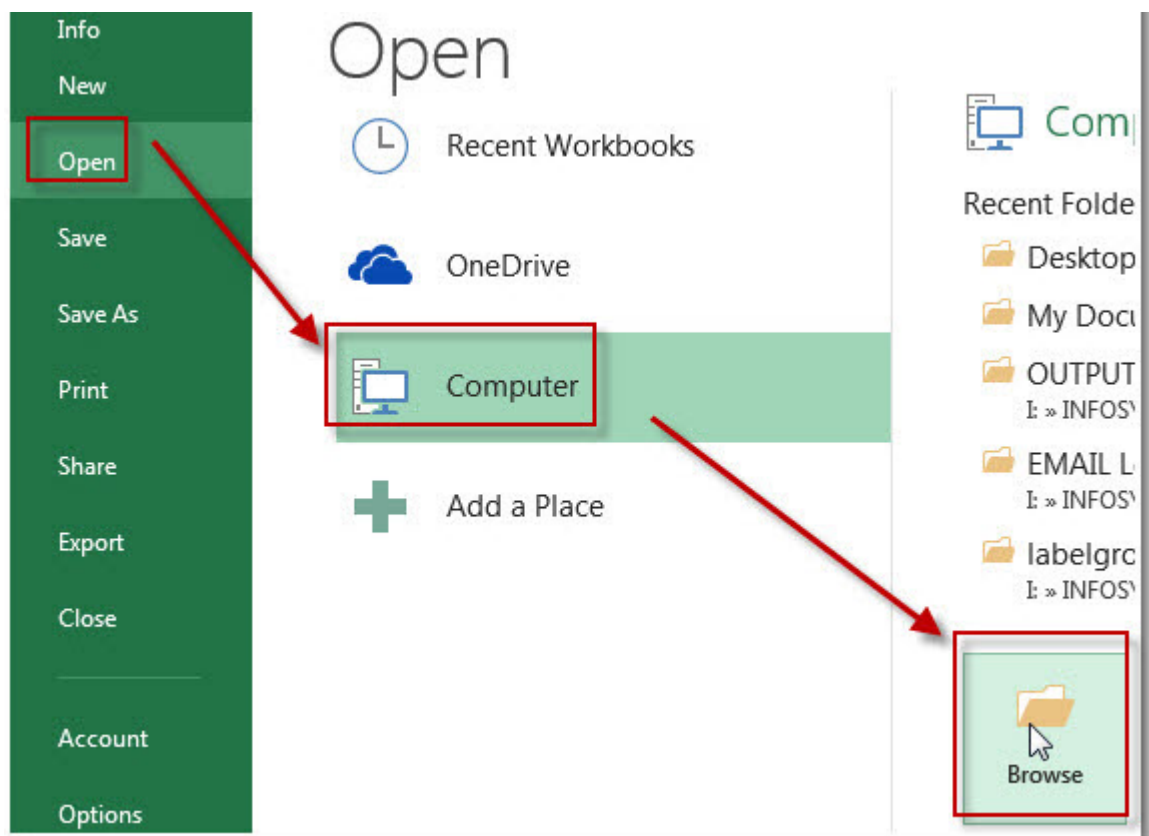
1. Click on the Excel icon.



- Click inside the window that opens to create a new Excel table

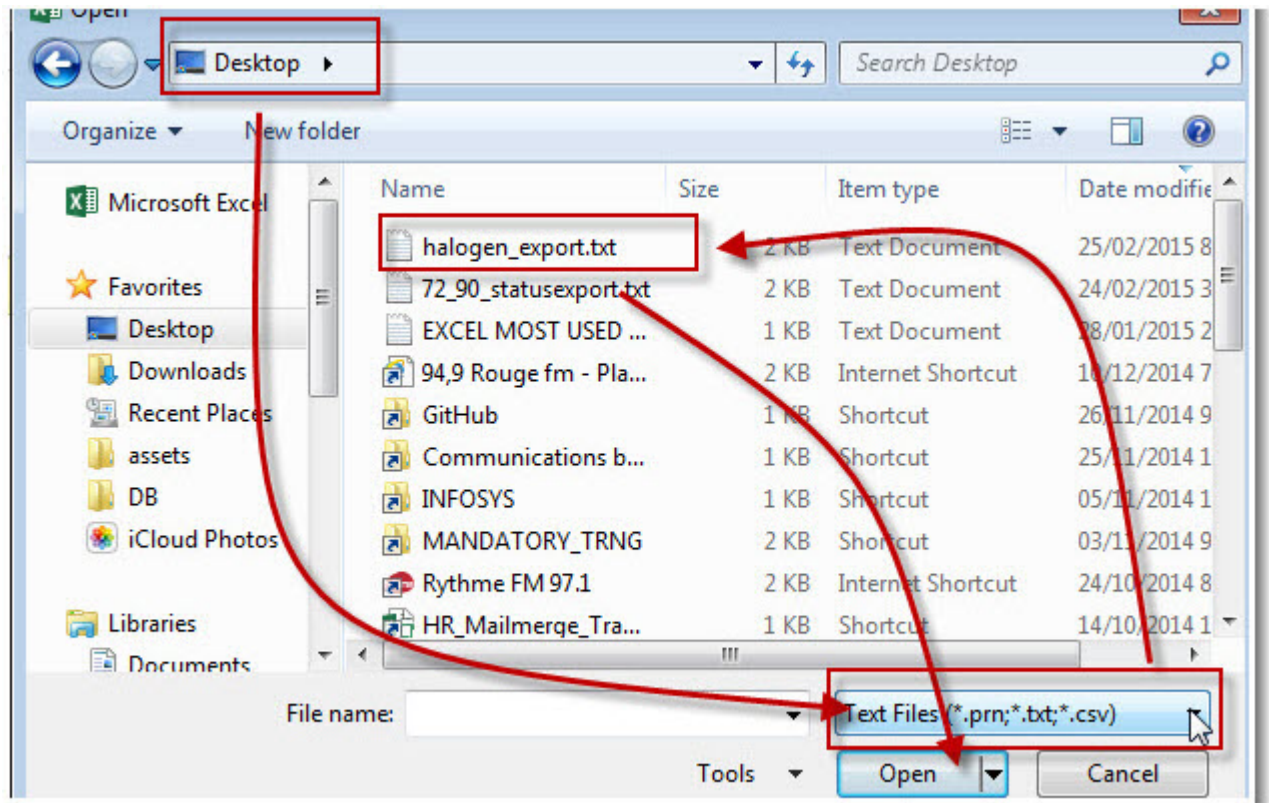


- Click **Open**.



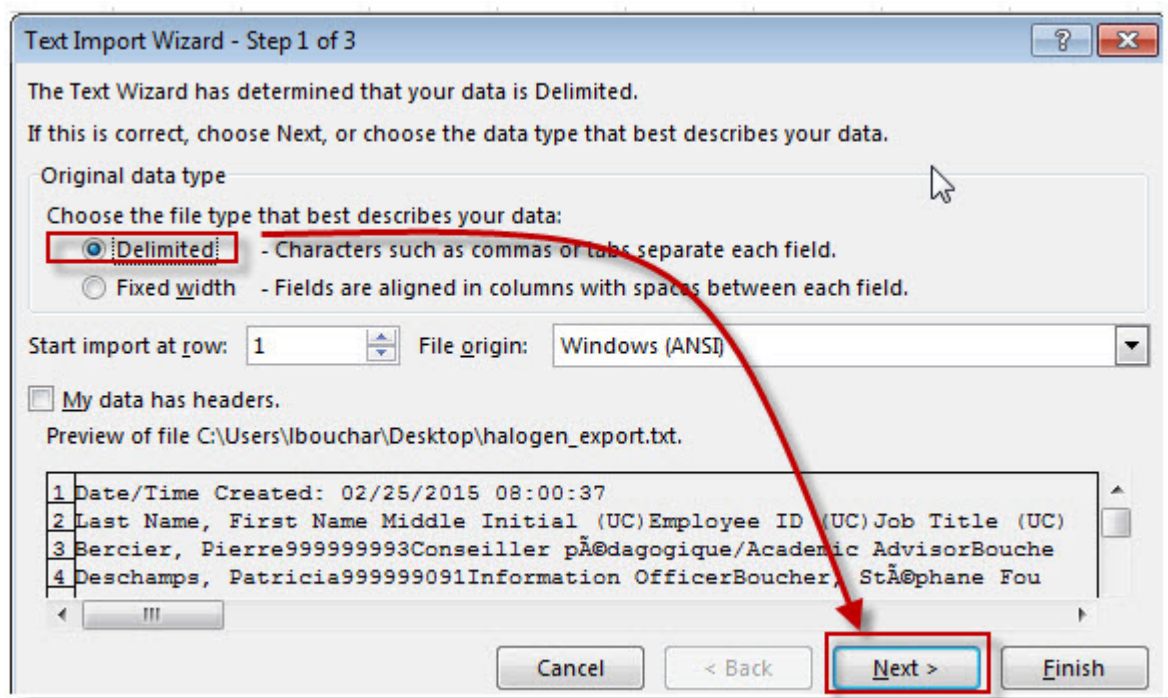
- Click **Computer**.

5. Click **Browse**.
6. Go the directory where the file created by Halogen was saved (e.g., Desktop)

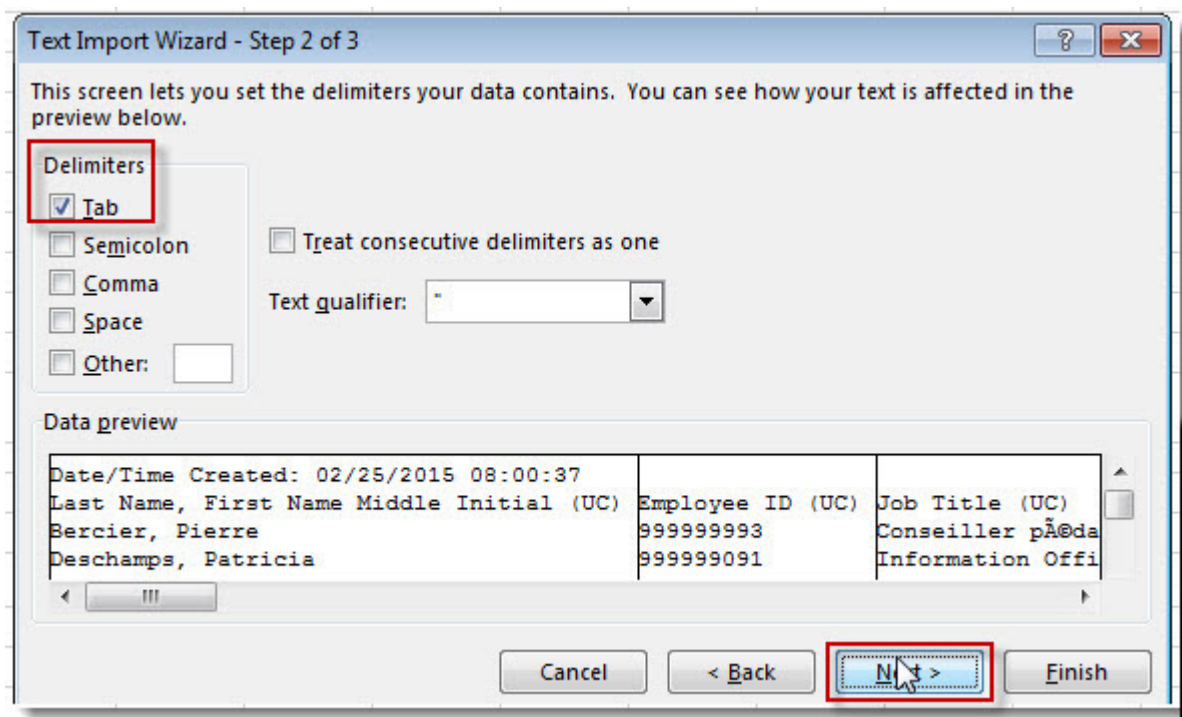


7. Select **Text Files (\*.prn, \*.txt, \*.csv)** from the dropdown list of file formats.
8. Select the document created by Halogen that you want to open in Excel.
9. Click **Open**.

10. Click **Next**.



11. Click **Next**.



12. Click **Finish**.
13. Save the report as an Excel file.



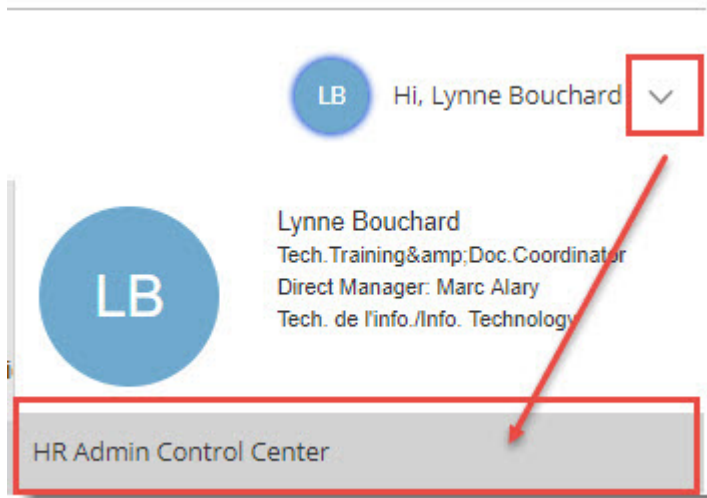


# User Activation / Deactivation

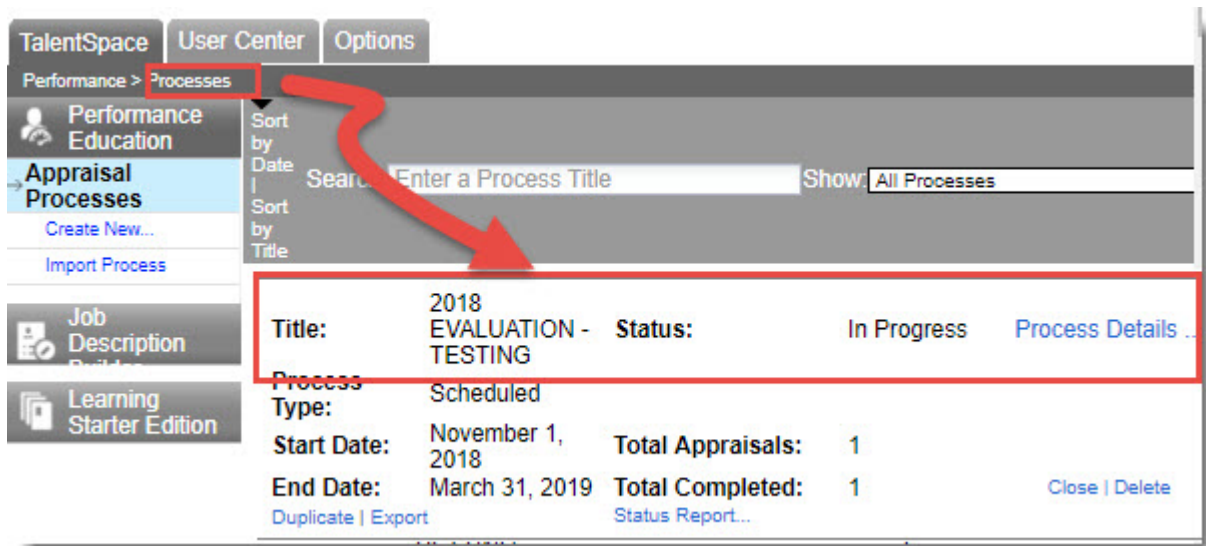
## User Activation and Deactivation

### Opening the *HR Admin Control Center*

1. Click **HR Admin Control Center** from the upper right corner of your screen.



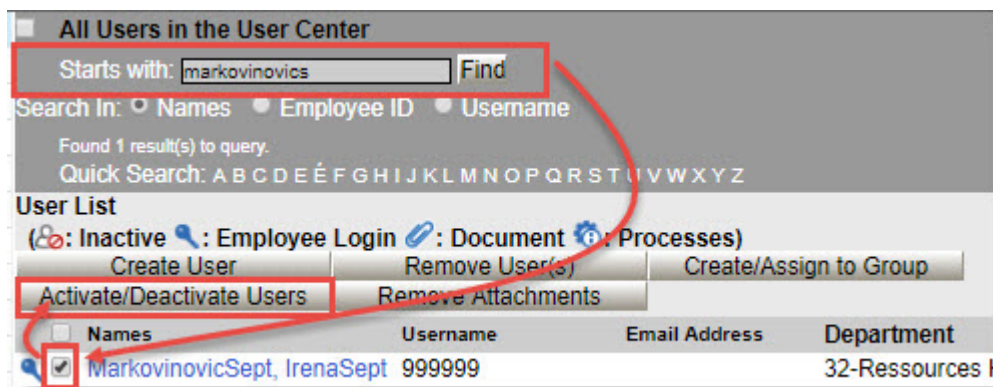
2. Select the process by clicking on **Process Details**.



## User Deactivation / User Activation

It is necessary to deactivate a user if he/she leaves the University. The user that terminates his employment and comes back will have his/her account reactivated. The steps to activate a user are the same to deactivate a user.

1. Type the search criterion in the **Starts with** field.  
You can search the employee by typing the name, the employee number or the user id.



2. Click **Find**.

3. Click inside the box belonging to the employee to activate or deactivate.
4. Click **Activate/Deactivate Users**.

☐ **All Users in the User Center**

Starts with:

Search In: ☒ Names ☐ Employee ID ☐ Username

Found 3 result(s) to query.

Quick Search: A B C D E F G J L M P R S T V

**User List** ( : : : )

<input type="button" value="Create User"/>	<input type="button" value="Remove User(s)"/>	<input type="button" value="Create/Assign to Group"/>
<input type="button" value="Activate/Deactivate Users"/>	<input type="button" value="Remove Attachments"/>	<input type="button" value="Generate Password"/>

<input type="checkbox"/> Names	Username	Email Address
<input type="checkbox"/> Bouchard, Lynne	lynne.bouchard	lynne.bouchard@uottawa.c
<input checked="" type="checkbox"/> Bourque, Carole	cbourque	cbourque@uottawa.ca
<input type="checkbox"/> Boutin, Dominic	dominic.boutin	dominic.boutin@uottawa.ca

5. Click **Ok** to confirm the deactivation/activation of the user.

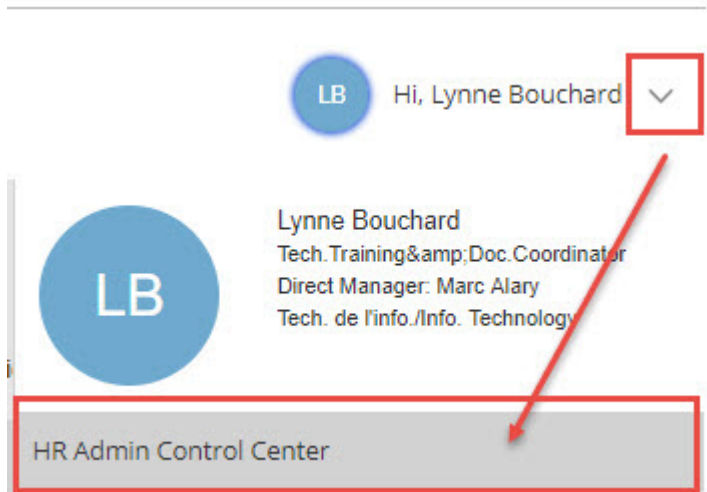
You are about to activate or deactivate the selected users.

Do you want to continue?

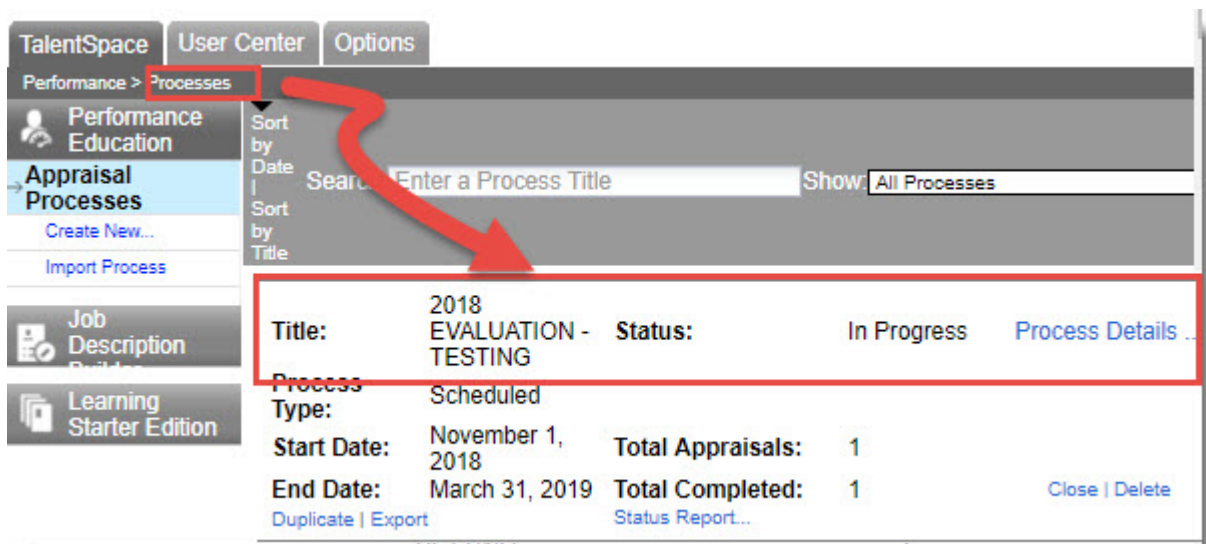
## User Creation

### Opening the *HR Admin Control Center*

1. Click **HR Admin Control Center** from the upper right corner of your screen.



2. Select the process by clicking on **Process Details**.



## Personal Information Entry

The employee information of the employee must be entered if it does not appear in Halogen.

1. Type the  First Name .

The screenshot shows the 'User Properties' dialog box with the 'Personal Info' tab selected. The dialog has a title bar with 'Save & Return to User List', 'Save', and a close button. Below the title bar are two buttons: 'Revoke Mobile App Access' and 'Revoke Outlook Plug-in Access'. The 'Personal Info' tab is highlighted with a red box. The form contains the following fields:

Field	Field	Field	Field
Salutation:	<input type="text"/>	Middle Initials:	<input type="text"/>
First Name:	<input type="text"/>	Last Name:	<input type="text"/>
Username:	<input type="text"/>	Password:	<input type="password"/>
Language:	<input type="text" value="--default--"/>	User Account Locked:	<input type="checkbox"/>
Address 1:	<input type="text"/>	Address 2:	<input type="text"/>
City:	<input type="text"/>	Province/State:	<input type="text"/>
Country:	<input type="text"/>	Postal/Zip Code:	<input type="text"/>
Email Address:	<input type="text"/>	Do not send emails:	<input type="checkbox"/>

2. Type the  Last Name .
3. Type the Outlook userid in the  Username  field.
4. Type a  Password .
5. Select the  Language  of preference.
6. Type the  Email Address .

## Job Information Entry

You must enter the job information.

1. Click the **Job Info** tab.

The screenshot shows the 'User Properties' dialog box with the 'Job Info' tab selected. The 'Job Info' tab is highlighted with a red box. The form contains the following fields:

Field	Field	Field	Field
Job Code:	-Select-	Work Group:	-Select-
Job Title:	-Select-	Division:	-Select-
Department:	-Select-	Location:	-Select-
Company:	-Select-	Last Appraisal Date:	
Employee ID:		Last Appraisal Score/Scale:	/
Hire Date:		Last Interim Review Date:	
Last Promotion Date:		Phone 1:	
Domain:		Phone 2:	
Fax Number:			

2. Type the position title in the **Job Title** field.
3. Type the **Department** (service) name.
4. Type the sector's in the **Division** field.
5. Type the nine-digits employee number in the **Employee ID** field.
6. Type the **Hire Date**.

## Supervisor Assignment or Modification

The positions hierarchy of term employees is not entered in Halogen, therefore; it is necessary to assign supervisors to your employees that do not have one. It is also

possible that the supervisor displayed on the screen is not the right one, follow the next steps to add or modify a supervisor.

1. Click **Manager**.

The screenshot shows the 'User Properties' dialog box with the 'Assignment' tab selected. The 'Manager' field is highlighted with a red box, and a red arrow points to the 'Manager...' button, which is also highlighted with a red box. Other buttons include 'HR Representative...', 'Career Coach...', 'Secondary Managers', 'Add', 'Create/Assign to Group', 'Revoke Mobile App Access', and 'Revoke Outlook Plug-in Access'.

Save & Return to User List Save

User Properties

Revoke Mobile App Access Revoke Outlook Plug-in Access

Personal Info Job Info **Assignment** Custom Details Salary Details






Manager:

HR Representative:

Career Coach:

Manager...  
HR Representative...  
Career Coach...

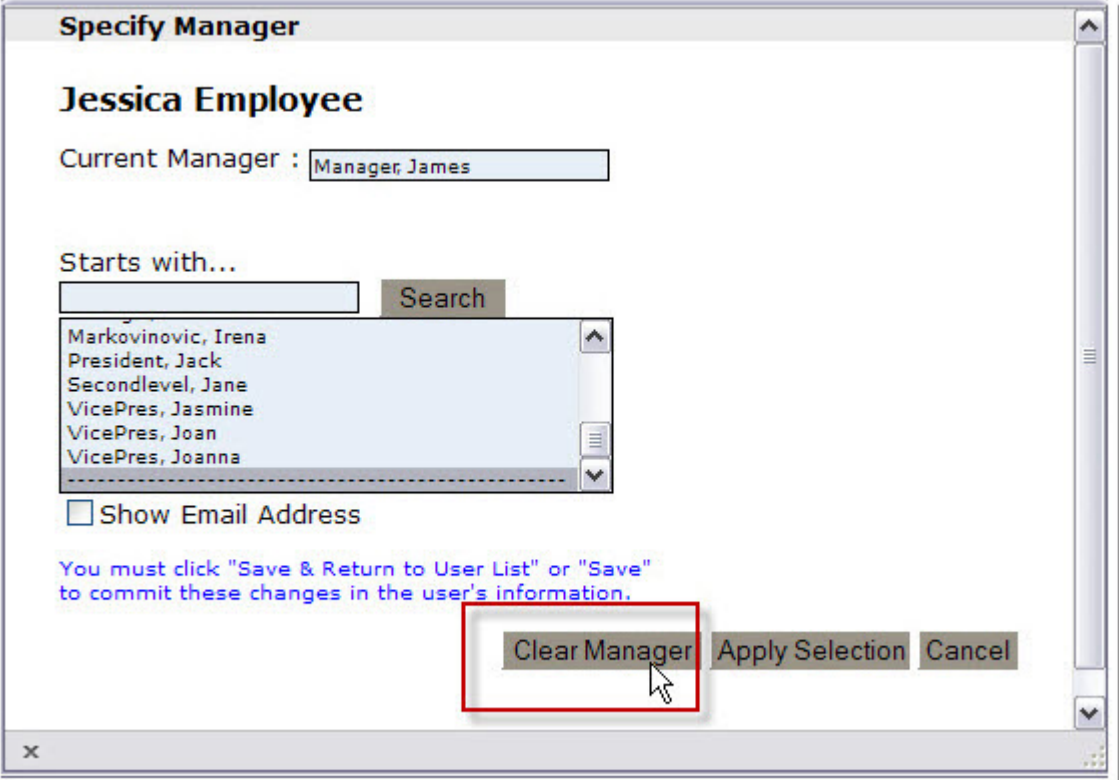
Secondary Managers Add

Name     

Part of Group(s):

Create/Assign to Group

2. (Optional) Click **Clear Manager** (only if the supervisor's name is incorrect).



**Specify Manager**

**Jessica Employee**

Current Manager :

Starts with...  **Search**

Markovinoic, Irena	▲
President, Jack	
Secondlevel, Jane	
VicePres, Jasmine	
VicePres, Joan	
VicePres, Joanna	▼

☐ Show Email Address

You must click "Save & Return to User List" or "Save" to commit these changes in the user's information.

**Clear Manager** **Apply Selection** **Cancel**

The image shows a 'Specify Manager' dialog box for 'Jessica Employee'. The 'Current Manager' field contains 'Manager, James'. Below it is a 'Starts with...' search section with a text input and a 'Search' button. A list of names is displayed: 'Markovinoic, Irena', 'President, Jack', 'Secondlevel, Jane', 'VicePres, Jasmine', 'VicePres, Joan', and 'VicePres, Joanna'. The 'Clear Manager' button is highlighted with a red rectangle and a mouse cursor. At the bottom, there are three buttons: 'Clear Manager', 'Apply Selection', and 'Cancel'. A note at the bottom states: 'You must click "Save & Return to User List" or "Save" to commit these changes in the user's information.'



3. (Optional) Click again on **Manager** (only if you have removed the manager at the previous step).

The screenshot shows the 'User Properties' dialog box with the 'Assignment' tab selected. The 'Manager' field is highlighted with a red box, and a red arrow points to the 'Manager...' button, which is also highlighted with a red box. Other buttons like 'HR Representative...' and 'Career Coach...' are visible. The 'Secondary Managers' section is also shown.

Save & Return to User List Save

Revoke Mobile App Access Revoke Outlook Plug-in Access

Personal Info Job Info **Assignment** Custom Details Salary Details

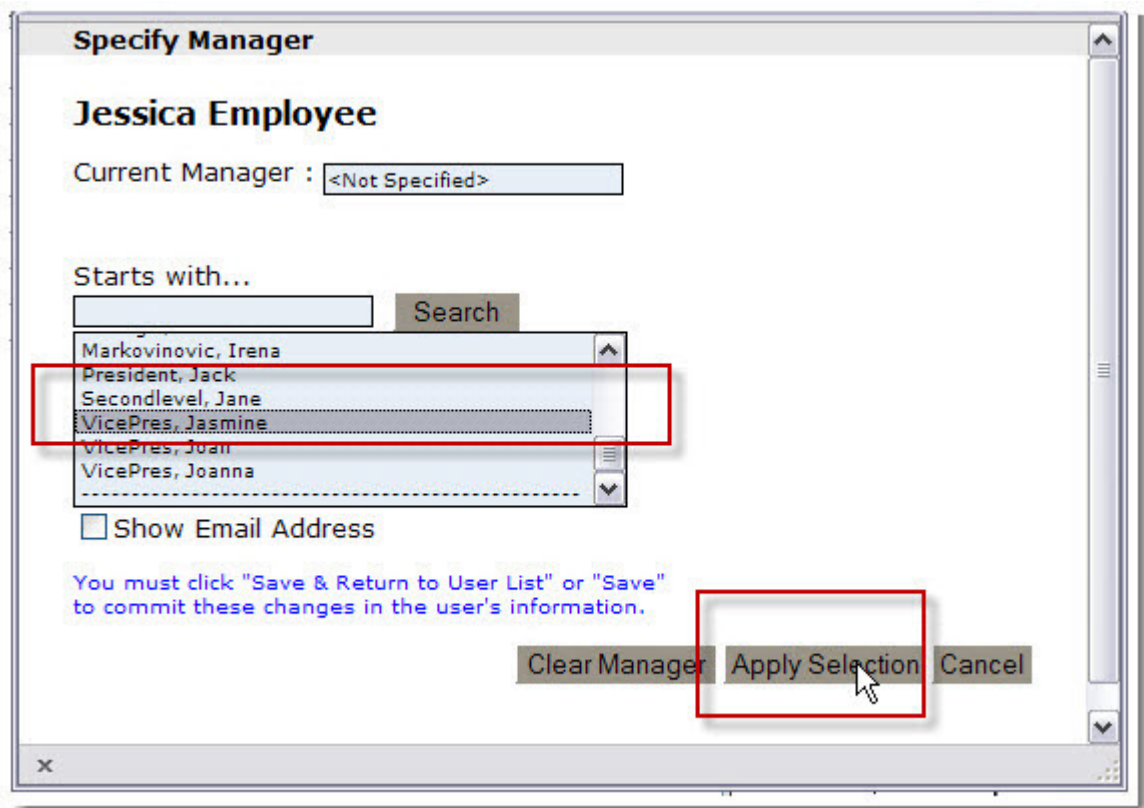
Manager:  **Manager...**  
HR Representative:  HR Representative...  
Career Coach:  Career Coach...

Secondary Managers Add

Name

Part of Group(s):  
Create/Assign to Group

4. Select the supervisor name and click **Apply Selection**.



## Assignment or Modification of the HR Administrator

The positions hierarchy of term employees is not entered in Halogen, therefore; it is necessary to assign HR Administrators to your employees that do not have one. It is also

possible that the HR Administrator displayed on the screen is not the right one, follow the next steps to add or modify an HR Administrator.

1. Click **HR Representative**.

Save & Return to User List Save

**User Properties**

Revoke Mobile App Access Revoke Outlook Plug-in Access

Personal Info Job Info **Assignment** Custom Details Salary Details

Manager:

HR Representative:

Career Coach:

Manager... HR Representative... Career Coach...

Secondary Managers Add

Name

Part of Group(s):

Create/Assign to Group

2. (Optional) Click **Clear HR Rep** (only if the HR Administrator is incorrect).

**Specify Human Resources Representative**

Current HR Representative : VicePres, Joan

Starts with...

Search

- Markovinovic, Irena
- President, Jack
- Secondlevel, Jane
- VicePres, Jasmine
- VicePres, Joan
- VicePres, Joanna

☐ Show Email Address

You must click "Save & Return to User List" or "Save" to commit these changes in the user's information.

**Clear HR Rep** Apply Selection Cancel

- Click again on **HR Representative** (only if you have removed an HR Administrator at the previous step).

Save & Return to User List Save

**User Properties**

Revoke Mobile App Access Revoke Outlook Plug-in Access

Personal Info Job Info **Assignment** Custom Details Salary Details






Manager:

HR Representative:

Career Coach:

Manager...  
**HR Representative...**  
Career Coach...

Secondary Managers Add

Name     

Part of Group(s):

Create/Assign to Group

4. Select the HR Administrator name and click **Apply Selection** .

The screenshot shows a 'Specify Manager' dialog box for 'Jessica Employee'. The 'Current Manager' field is set to '<Not Specified>'. Below this is a 'Starts with...' search section with a text input and a 'Search' button. A list of names is displayed below the search section, with 'VicePres, Jasmine' selected and highlighted. A red rectangle is drawn around the list of names. Below the list is a checkbox labeled 'Show Email Address'. At the bottom of the dialog, there are three buttons: 'Clear Manager', 'Apply Selection', and 'Cancel'. A red rectangle is drawn around the 'Apply Selection' button, and a mouse cursor is pointing at it. A blue message at the bottom of the dialog states: 'You must click "Save & Return to User List" or "Save" to commit these changes in the user's information.'

**Specify Manager**

**Jessica Employee**

Current Manager : <Not Specified>

Starts with...

Search

Markovinov, Irena  
President, Jack  
Secondlevel, Jane  
VicePres, Jasmine  
VicePres, Joan  
VicePres, Joanna

☐ Show Email Address

You must click "Save & Return to User List" or "Save" to commit these changes in the user's information.

Clear Manager Apply Selection Cancel

## Group Assignment

The user that you are creating must be assigned to a groupe. The groups are used to produce grouped reports and are used to assign the different Halogen forms.

1. Click **Create/Assign to Group**.

The screenshot shows the 'User Properties' form with the 'Assignment' tab selected. The 'Assignment' tab is highlighted with a red box. Below the tab, there are fields for 'Manager:', 'HR Representative:', and 'Career Coach:', each with a text input field and a 'Manager...', 'HR Representative...', and 'Career Coach...' button respectively. There is also a 'Secondary Managers' section with an 'Add' button. Below these fields is a table with a 'Name' header and several icons. At the bottom of the form, there is a section labeled 'Part of Group(s):' with a 'Create/Assign to Group' button highlighted by a red box. A red arrow points from the 'Assignment' tab to the 'Create/Assign to Group' button.

2. Select the group(s) to which the employee must belong.  
Press the **CRTL** key of the keyboard and click on the group names simultaneously to select more than one group.
3. Click **Assign Group**.

4. Click **OK**.

**Create/Assign to Group**

☒ **Available Groups:**

Corporate
HR
Sales
Finance
TEST USERS

**Assign to these groups:**

**Assign >**

**< Remove**

**New Group >**

**New Group Name:**

☐ New group(s) based on user fields: **--none--** OR **--none--**

**OK** **Cancel**



## User Center Parameters Saving

1. Click [Save and Return to User List](#).

The screenshot shows the 'User Center > Create a User' interface. The left sidebar contains a 'User List' section with links like 'Group List', 'Import Users', and 'Automatic User Update'. The main area is titled 'User Properties - Jessica Employee'. At the top of this area, there is a navigation bar with a 'Save & Return to User List' button (highlighted with a red box) and a 'Save' button. Below this, there are tabs for 'Personal Info', 'Job Info', and 'Assignment'. The 'Personal Info' tab is active, showing fields for 'Manager' (VicePres, Jasmine), 'HR Representative' (HRRrep, Janice), and 'Career Coach'. There is also a 'Part of Group(s)' section with a 'Create/Assign to Group' button and a list of groups including 'Sales' and 'TEST USERS'.

2. Click on the X in the upper right corner to return to the user interface.

