Halogen User Guide

Human Resources

613-562-5832 | infohr@uOttawa.ca

www.hr.uOttawa.ca

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For more information

Human Resources
550 Cumberland St.
Room 019
K1N 6N5
Tel.: 613-562-5832
Fax. : 613-562-5206
infohr@uOttawa.ca

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Table of Contents

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.

2. Enter your Outlook password.

3. Click *Login*.

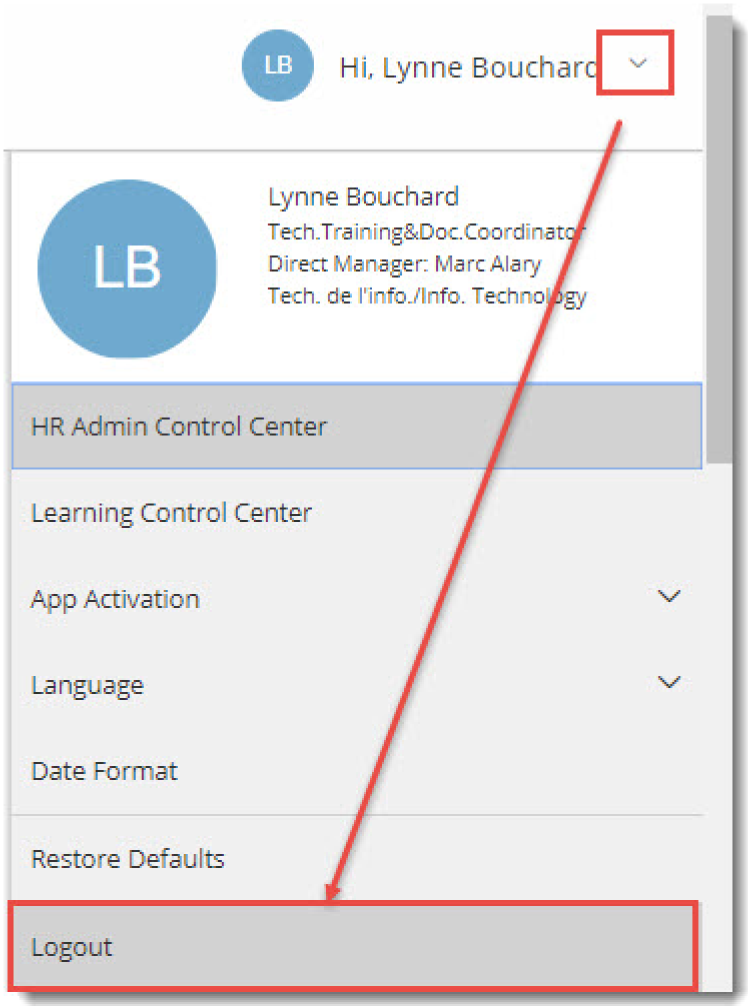
Close Halogen session

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

1. mailto; lgeorges@uottawa.ca

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

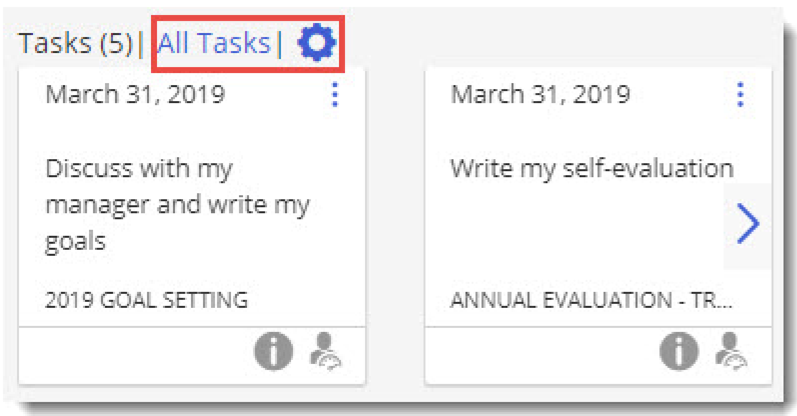
Organization	Faculty or Service	Nom	Courriel
70	Office of the Presidents and Vice-Presidents	Nathalie Chiasson	nchiass2@uOttawa.ca
71	Office of VP Acad and Provost	Nathalie Chiasson	nchiass2@uOttawa.ca
72	Office of VP Research	Nathalie Chiasson	nchiass2@uOttawa.ca
73	Office of VP Resources	Nathalie Chiasson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

The Halogen interface

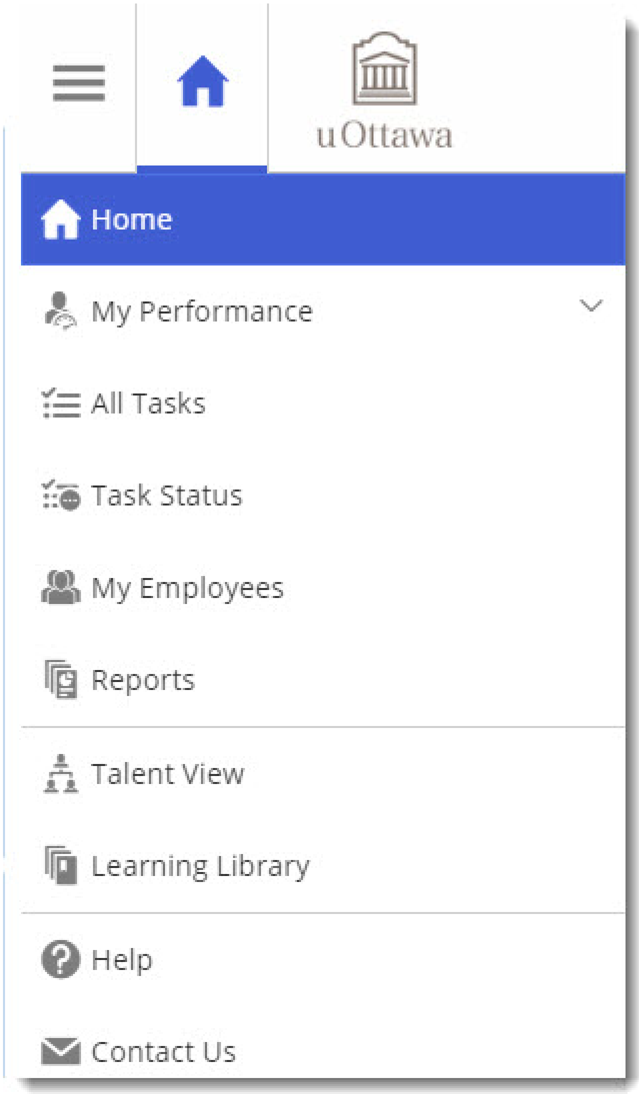
Navigation in Halogen

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.

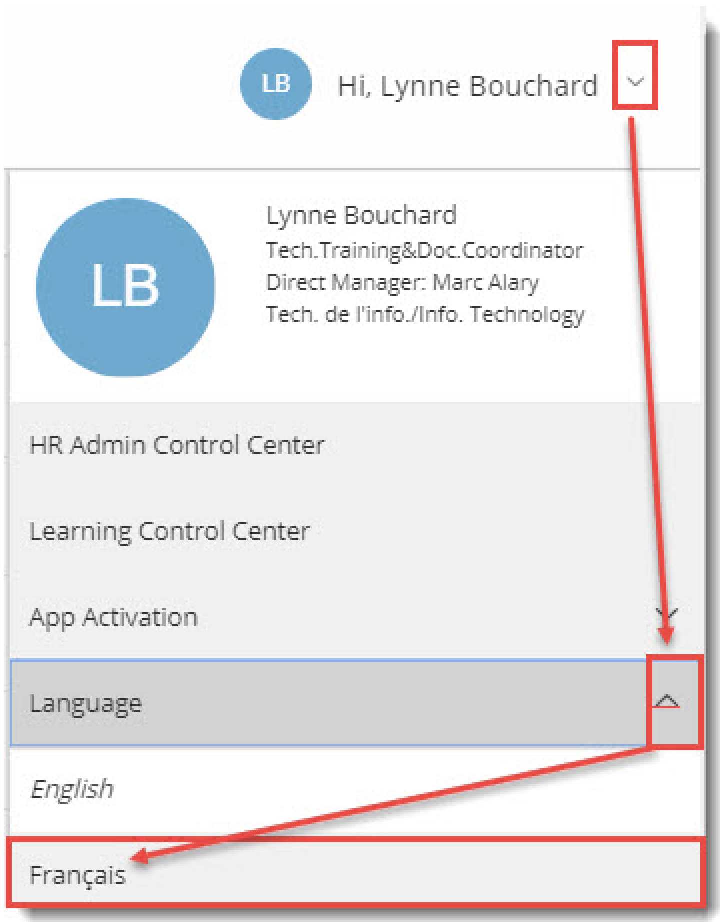


3. The icon represented by a house provides access to the Halogen home page.

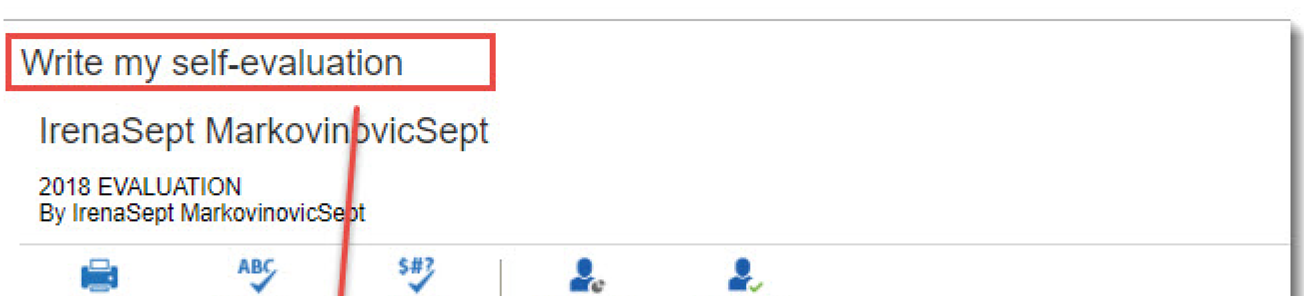
Changing the interface language

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.



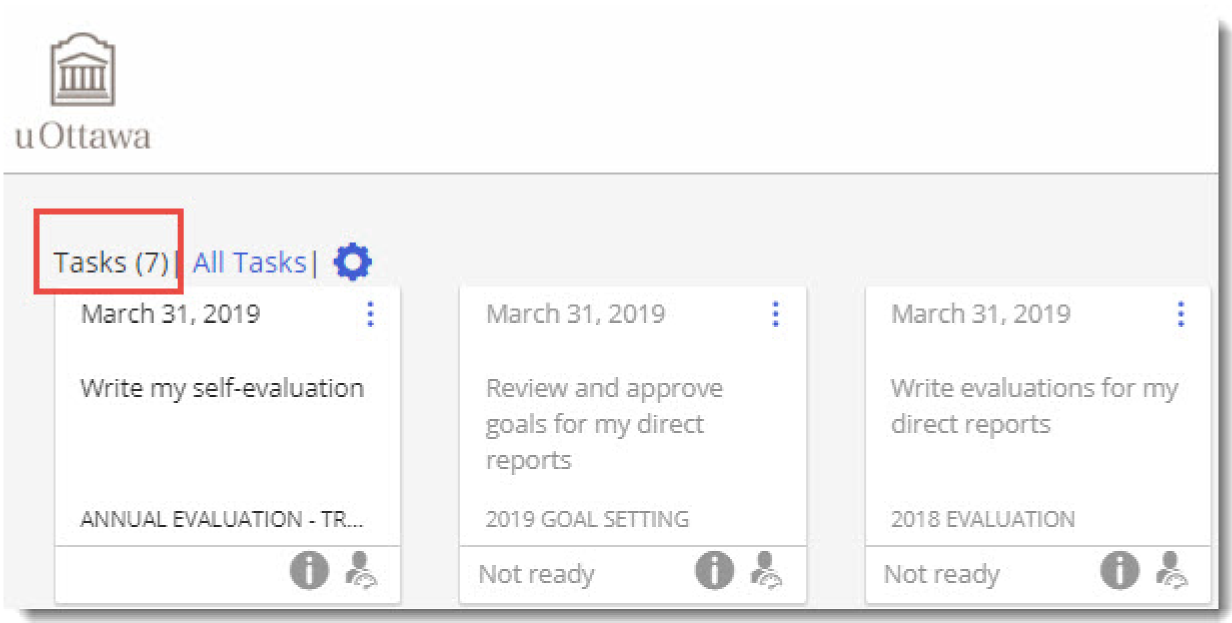
The default language is set when a user account is created. Forms for the user will always appear in the user's preferred language. Whether you are using the French or the English interface, however, forms are always displayed and published in the preferred language chosen for the user when the account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



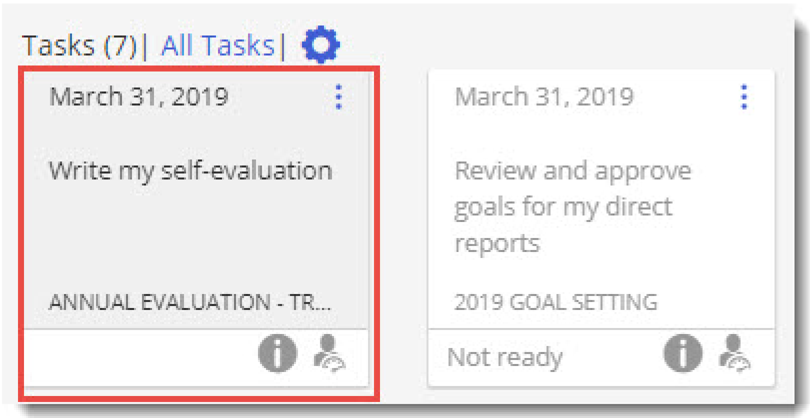
Tasks

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.

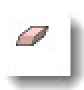
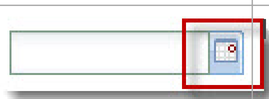
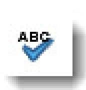
The system displays the list of steps (tasks) for the various processes that must be completed by the employee under the Tasks section.



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



Icons in Halogen Forms

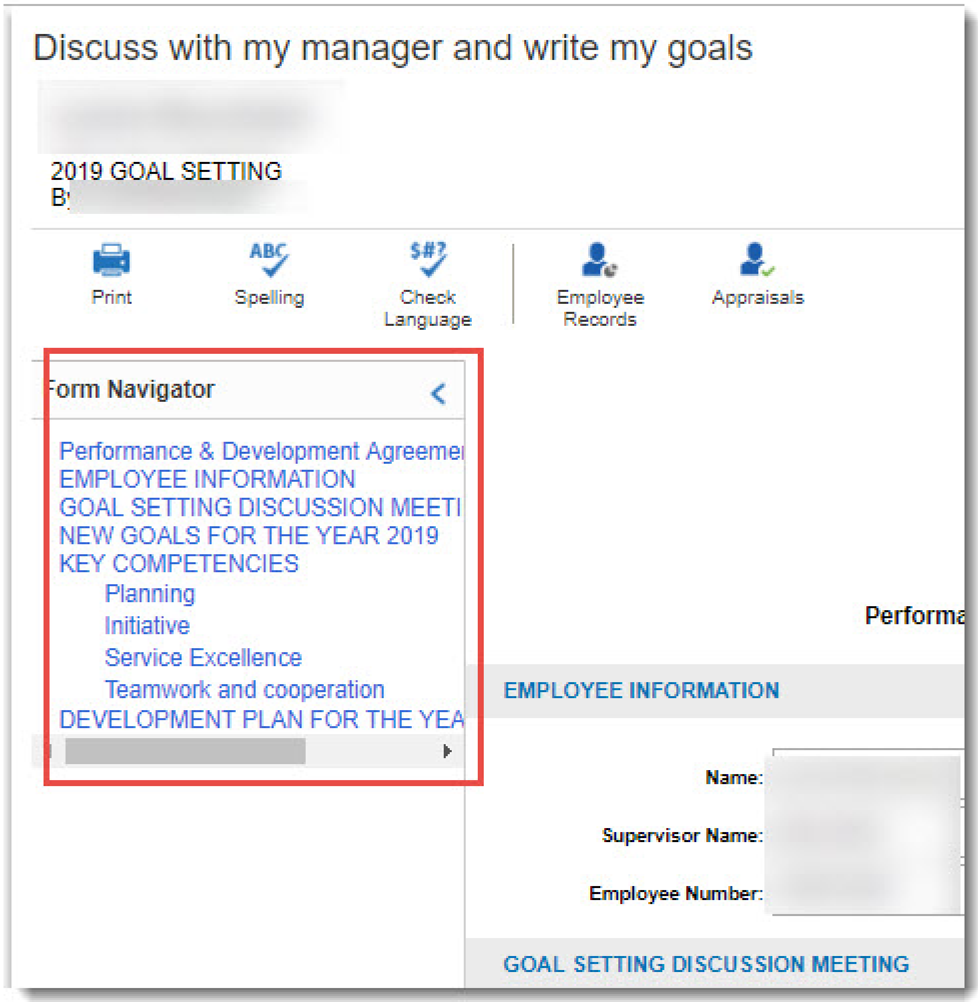
Icon	Function or meaning
	Links a goal to an organizational goal.
	Erases a title, description, due date or success indicator of a goal.
	Indicates the goal is linked to an organizational goal.
	Indicates a date field that opens a calendar to enter a date.
	Starts spell checker. You will be asked to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

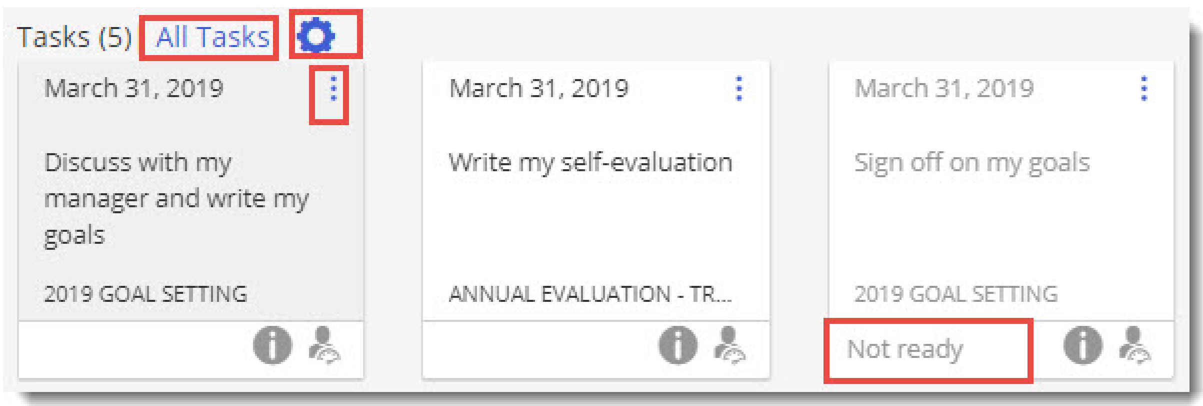

Discuss with my manager and write my goals
2019 GOAL SETTING
Print
Spelling
Check Language
Employee Records
Appraisals
Form Navigator
Performance & Development Agreeme
EMPLOYEE INFORMATION
GOAL SETTING DISCUSSION MEETI
NEW GOALS FOR THE YEAR 2019
KEY COMPETENCIES
Planning
Initiative
Service Excellence
Teamwork and cooperation
DEVELOPMENT PLAN FOR THE YEA
Performa
EMPLOYEE INFORMATION
Name:
Supervisor Name:
Employee Number:
GOAL SETTING DISCUSSION MEETING

Main functions

Tasks to complete

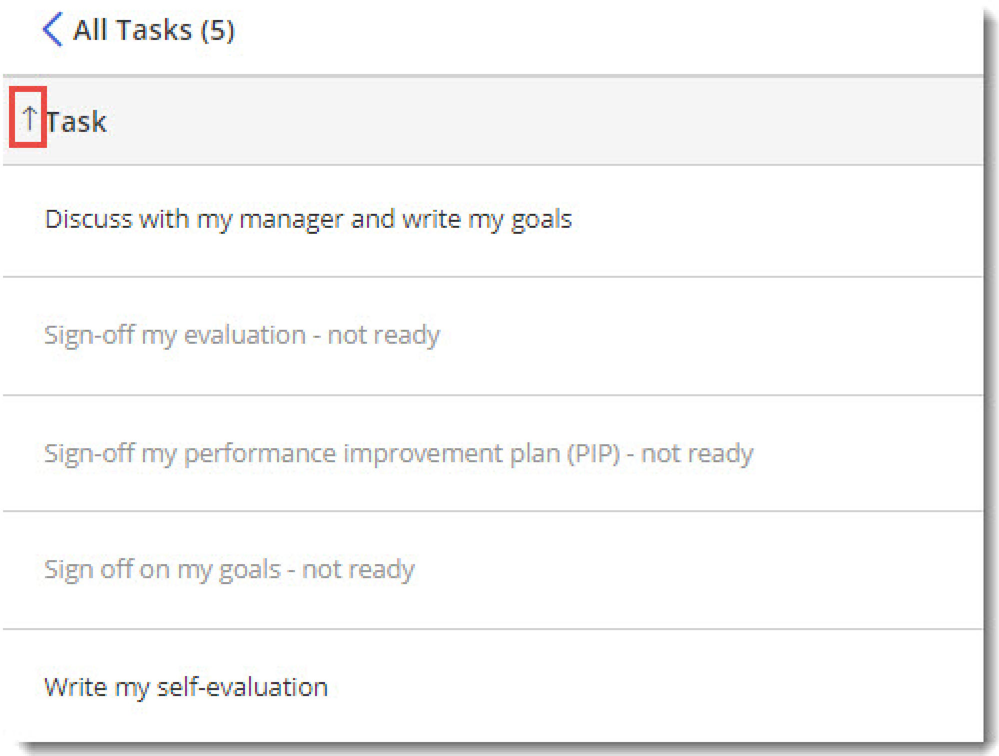
The Task section provides employees and supervisors with an overview of any tasks they have yet to complete (their own tasks and those of any employees they have).

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.

3. 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.

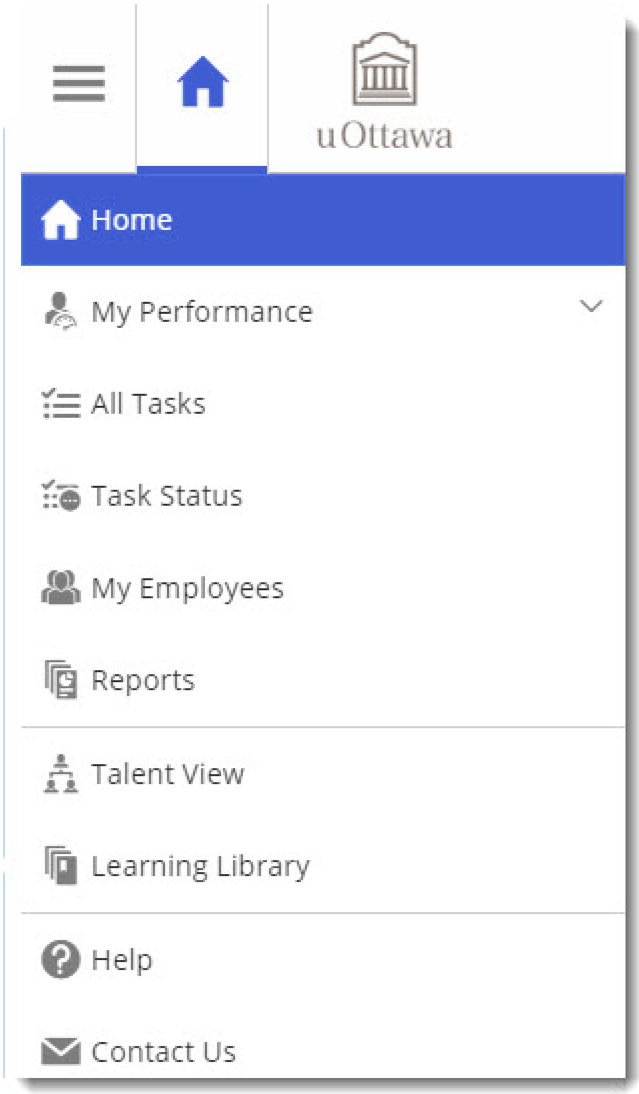


4. The system indicates the status of the task and the due date.

5. 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.

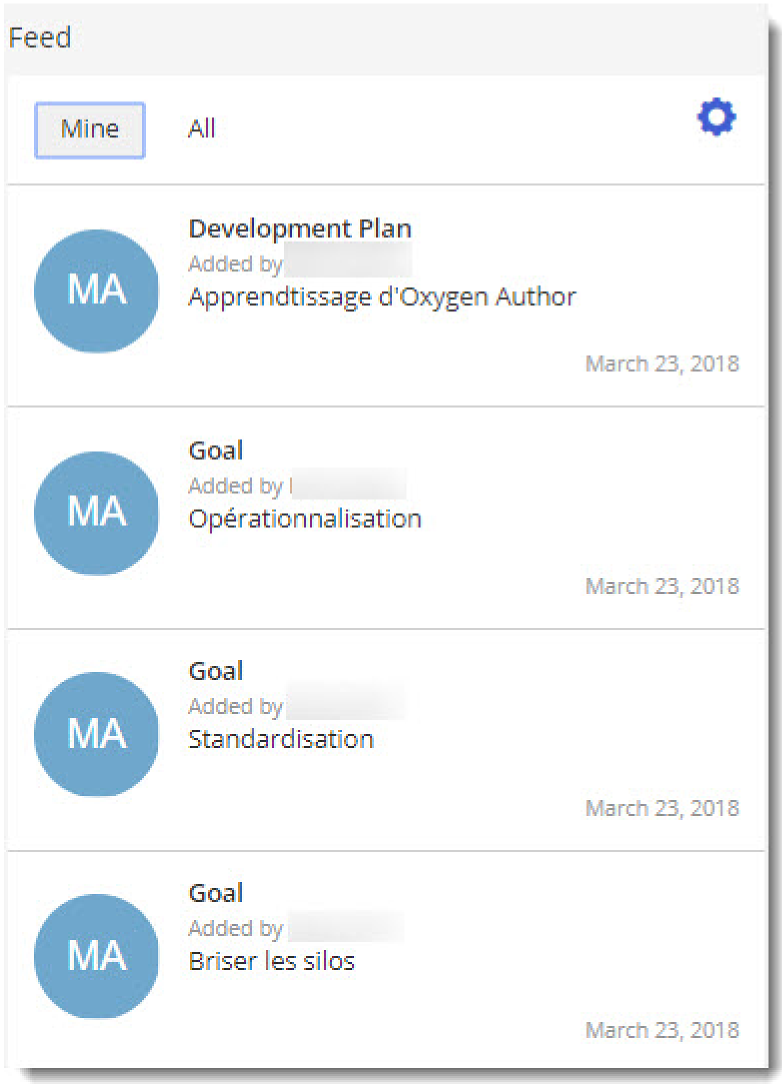
6. On the home page, the Tasks section displays all the processes or steps that require your participation.

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.

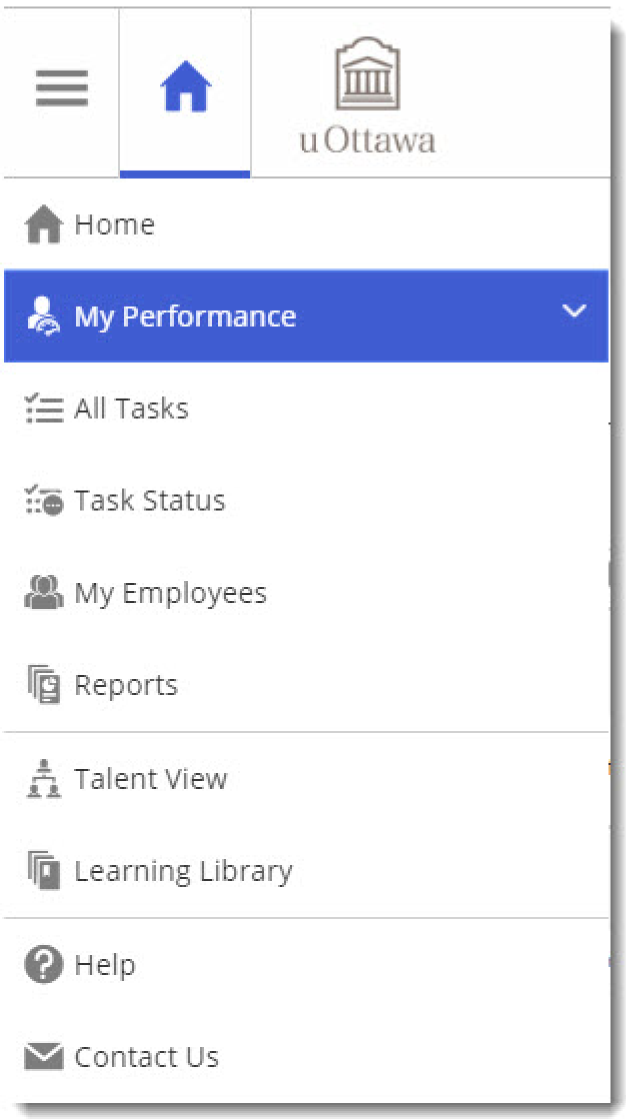


1. Changes made to goals and development plans appear only after the goal setting process has been completed, i.e., after the supervisor has given final approval.
2. The group of tabs that displays in the Feed depends on the user type.
   a. Employees: Mine.
   b. Supervisors: Mine and All.

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.

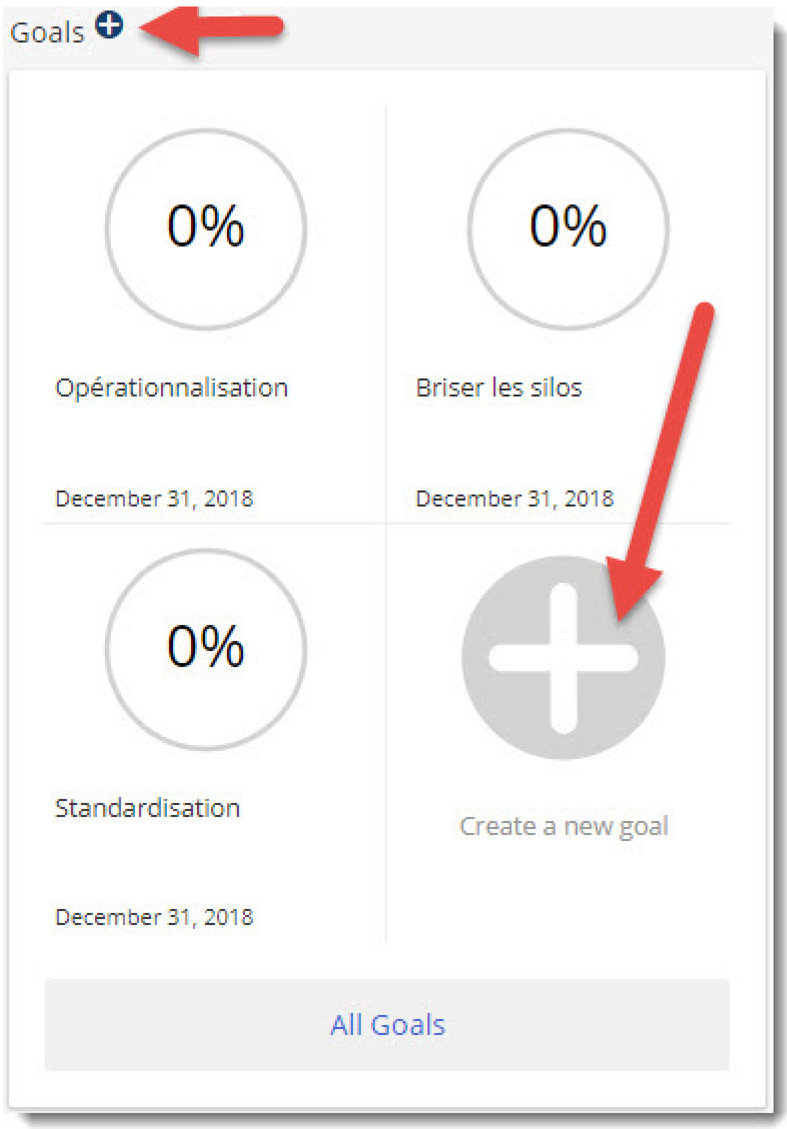
Important: If you add goals or development plans in My Performance, this information is not automatically added to the goal setting form completed at the start of the performance evaluation cycle. As a result, these goals and development plans will not be formally evaluated at the end of the cycle.

Adding a goal

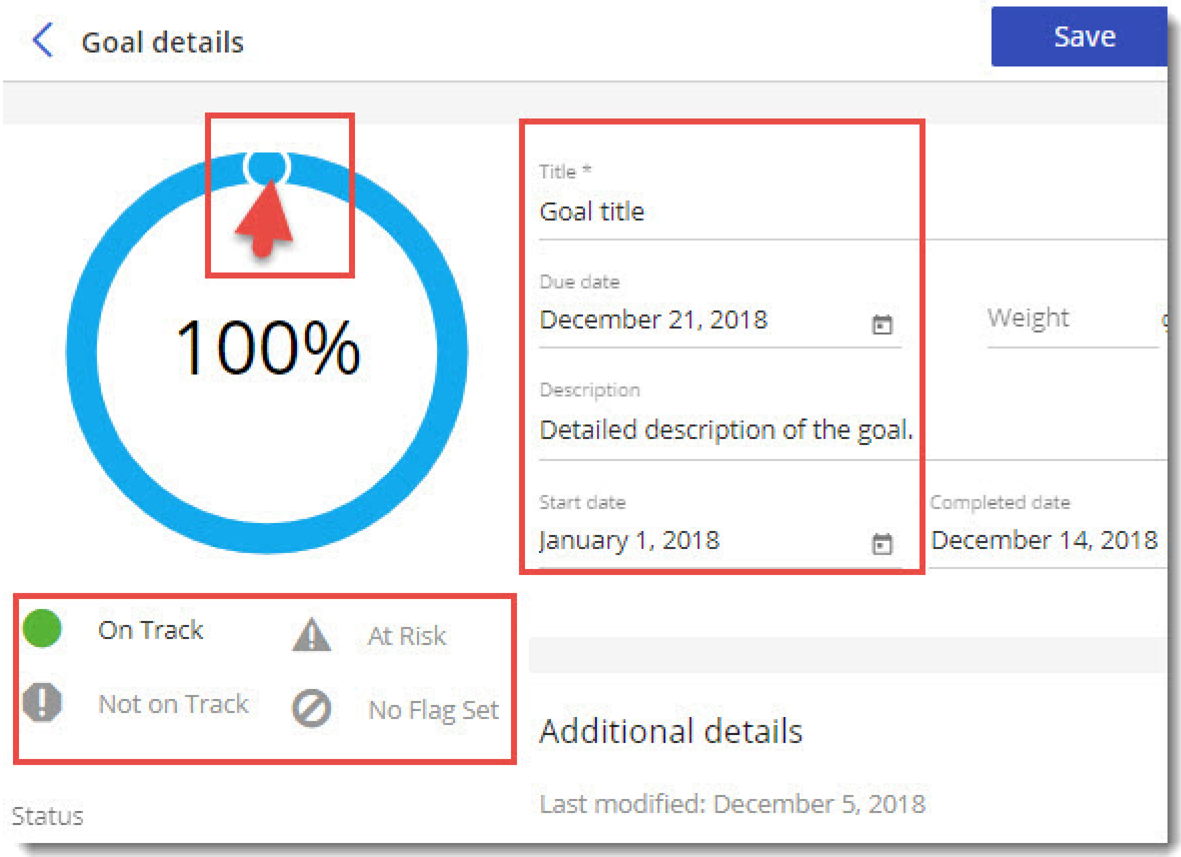
A goal is a target that an employee is encouraged to reach, generally within a specified period of time. Goals can be added by both employees and supervisors. An employee can also add goals after an evaluation has taken place. Employees and supervisors can consult the employee's goals at any time. Goals 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.



4. Enter the goal Title.

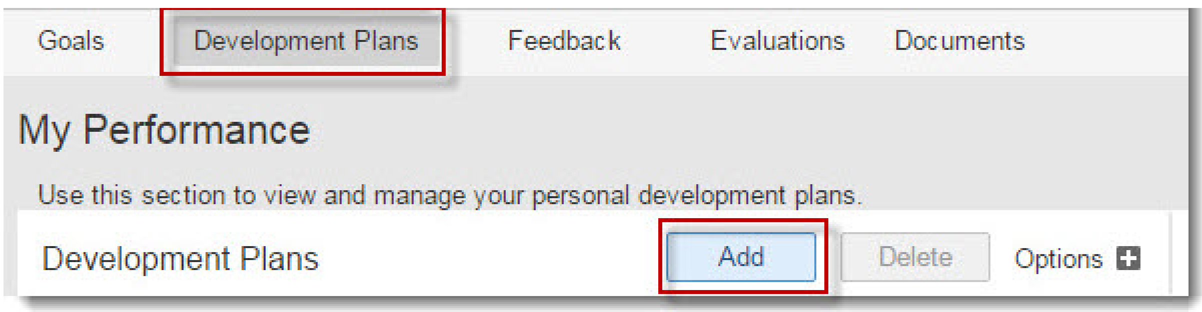


5. Click on the calendar icon next to the Due Date field and select a due date.
6. Provide a detailed description of the goal in the Description field.
7. Click on the calendar icon next to the Start Date field and select a start date.
8. (Optional)Click on the blue dot inside the large circle and turn 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.

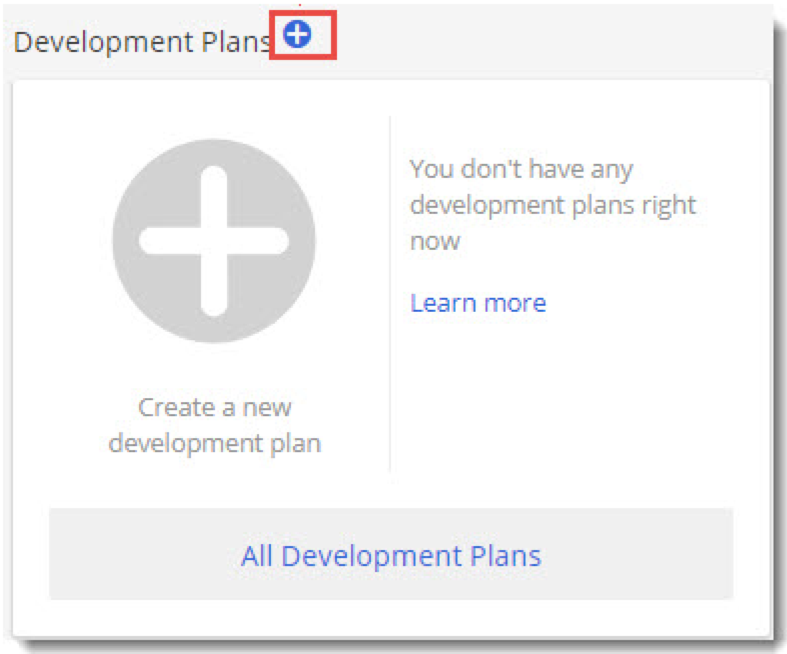
Adding a development plan

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

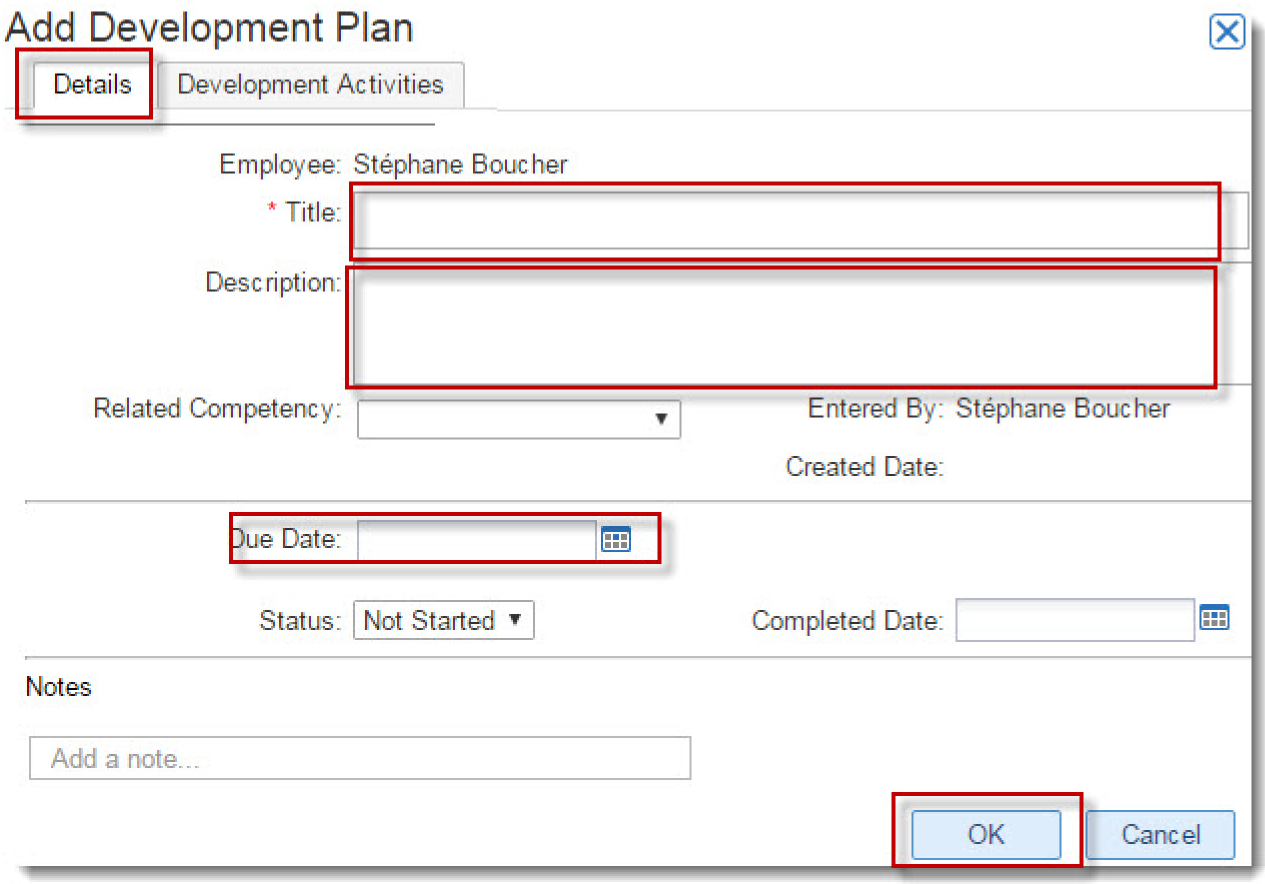
1. *Supervisors*: click View My Employees and then click on the the name of the employee for whom a development plan is to be added.
2. *Supervisors*: Click Development Plans.
3. *Supervisor* : Click Add.



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



5. Enter a title in the Title field.

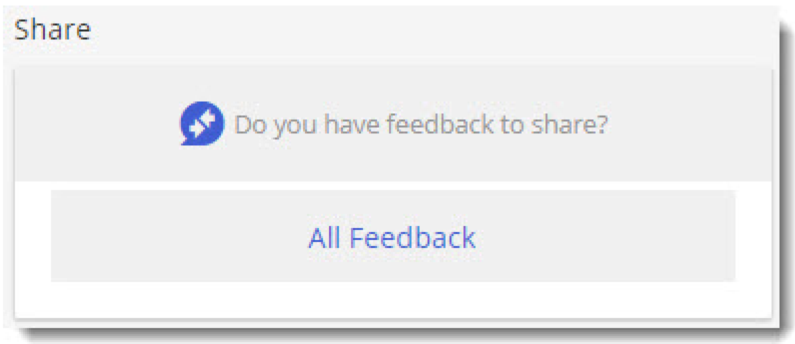


6. Provide a detailed description of the development plan in the Description field.
7. Click on the calendar icon next to the Due Date field and select a due date.
8. Click OK.

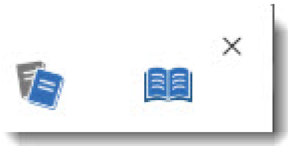
Adding a journal note

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 %.

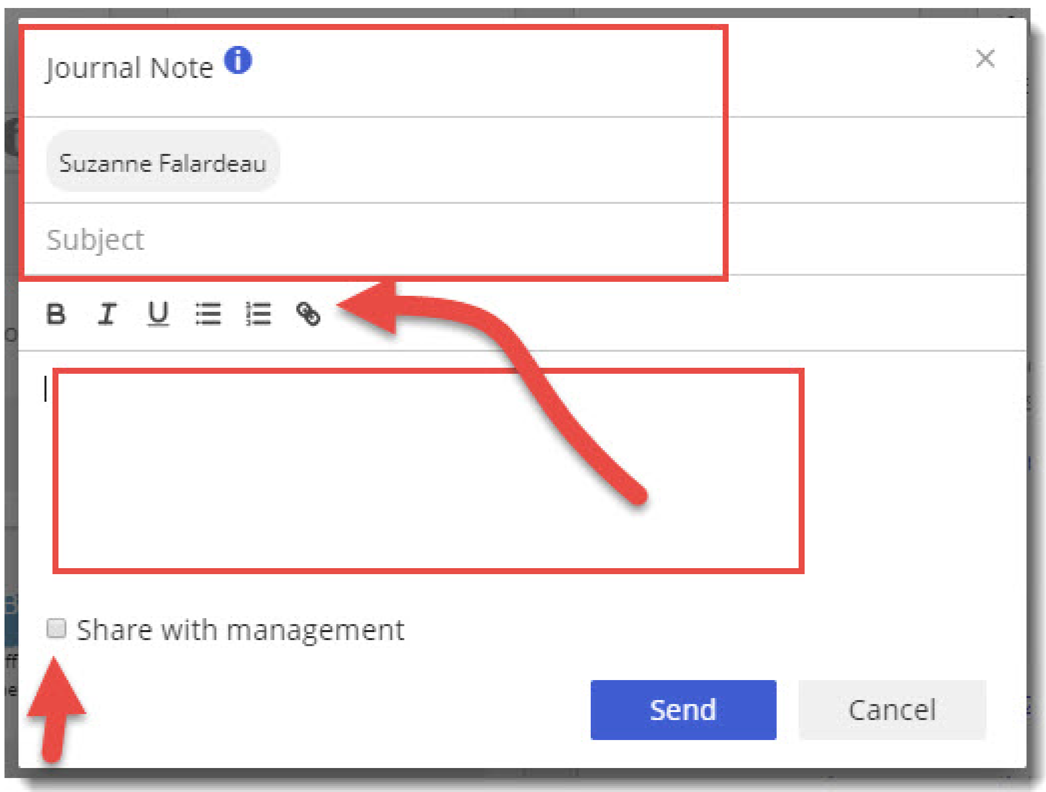
1. Click on Do you have feedback to share .



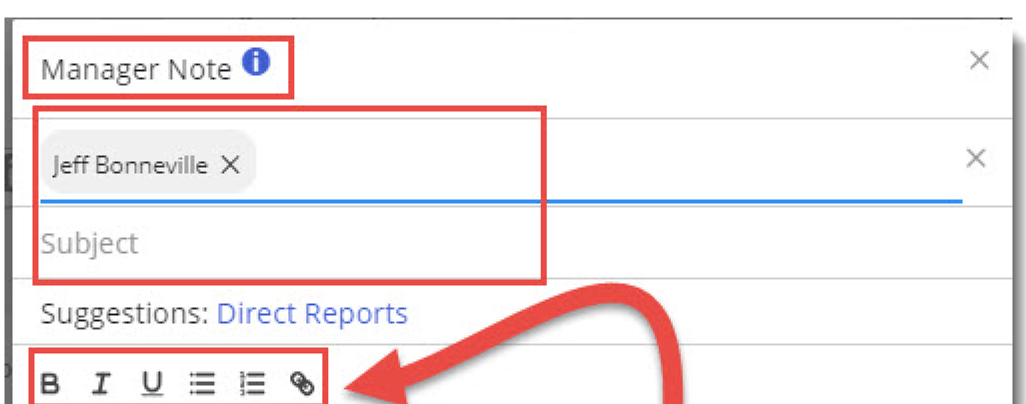
2. Click on one of the two icons.



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

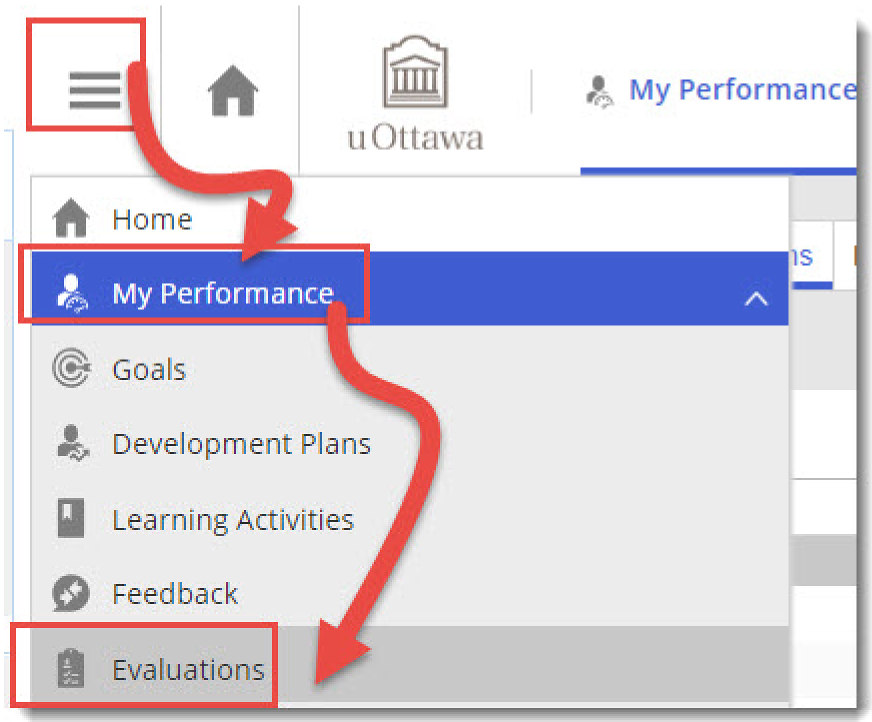


- Supervisors : Click the second icon  to enter a comment or feedback related to one of your employees.

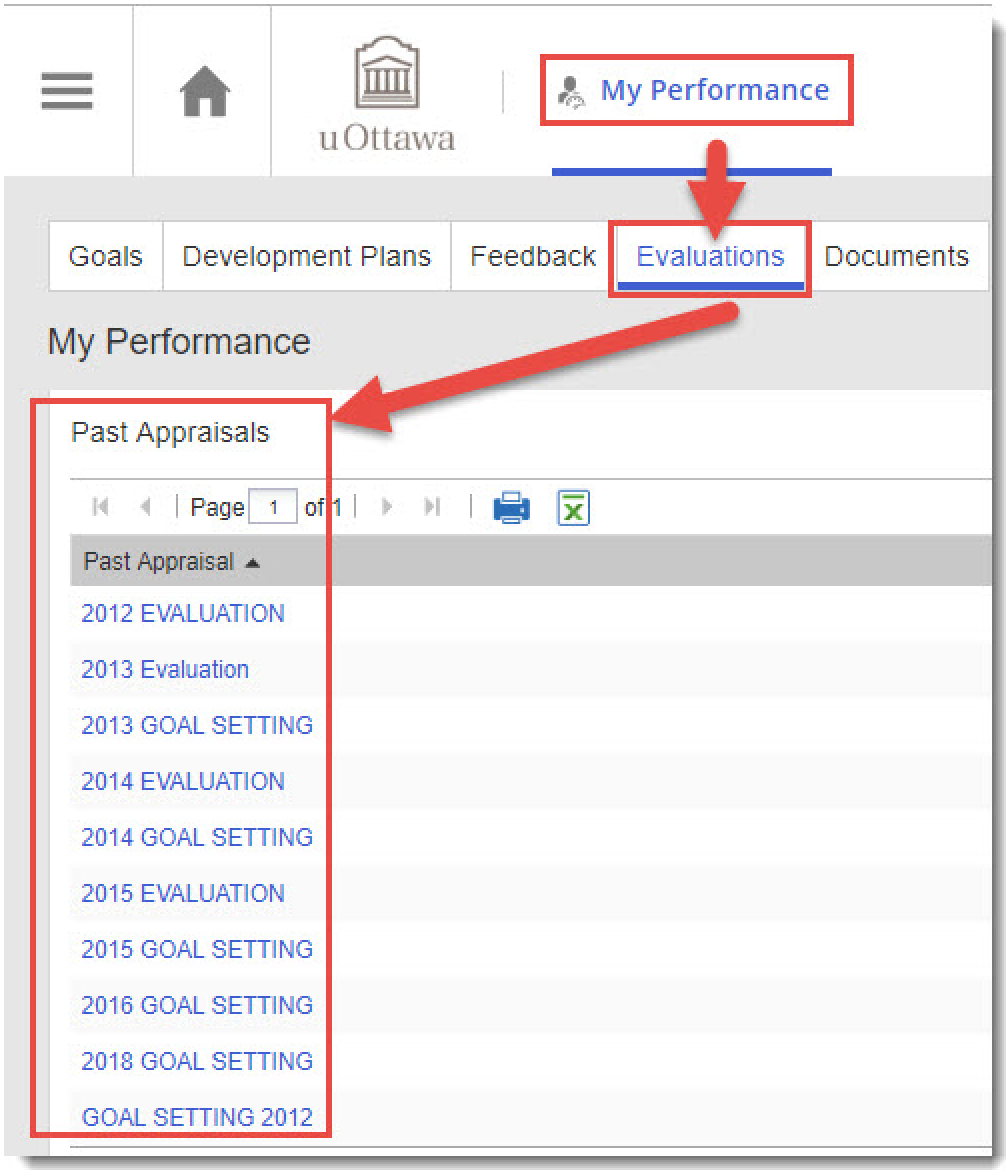


Evaluations

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.

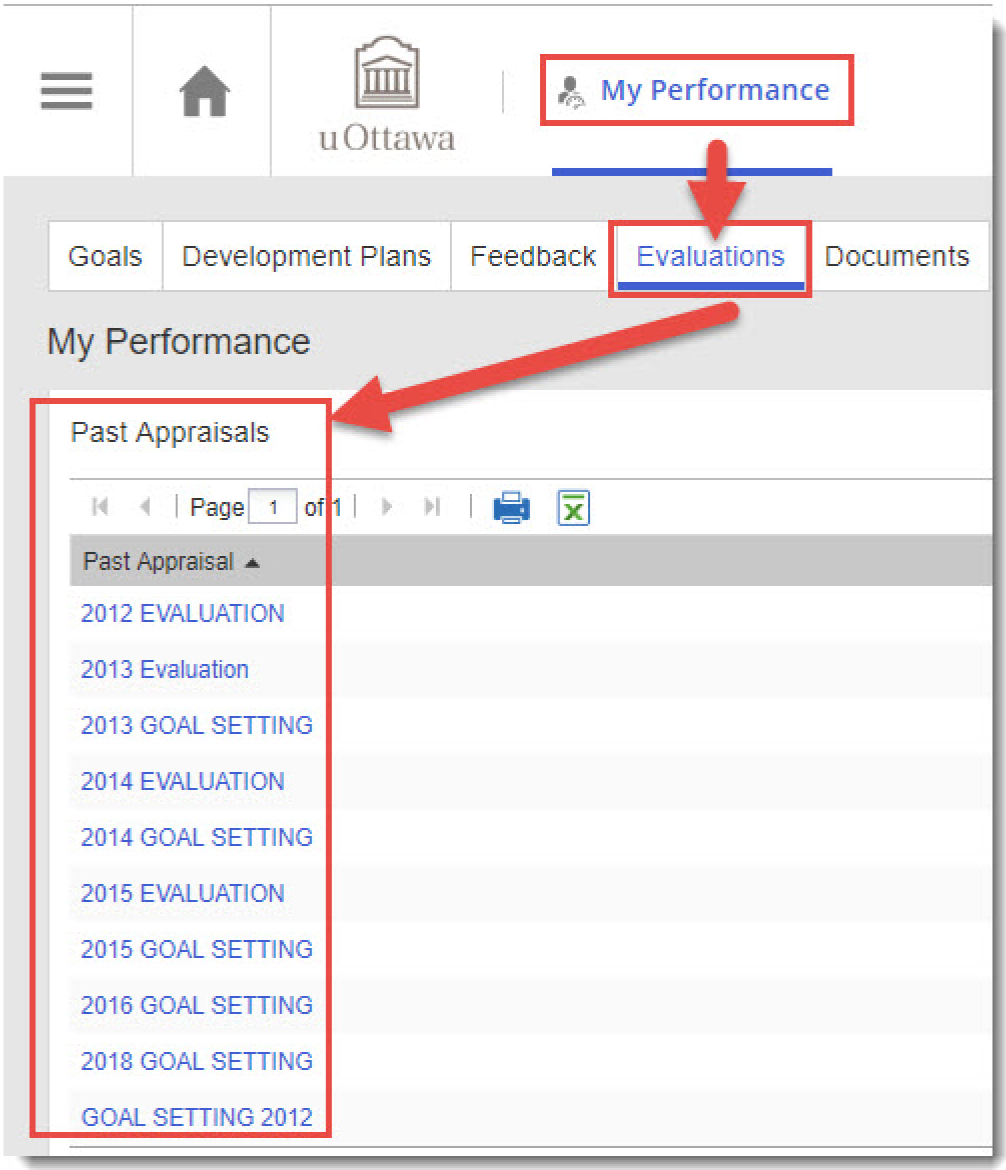


Print a completed form

1. Click the Main Menu Icon

2. Select My Performance.
3. Select Evaluations.

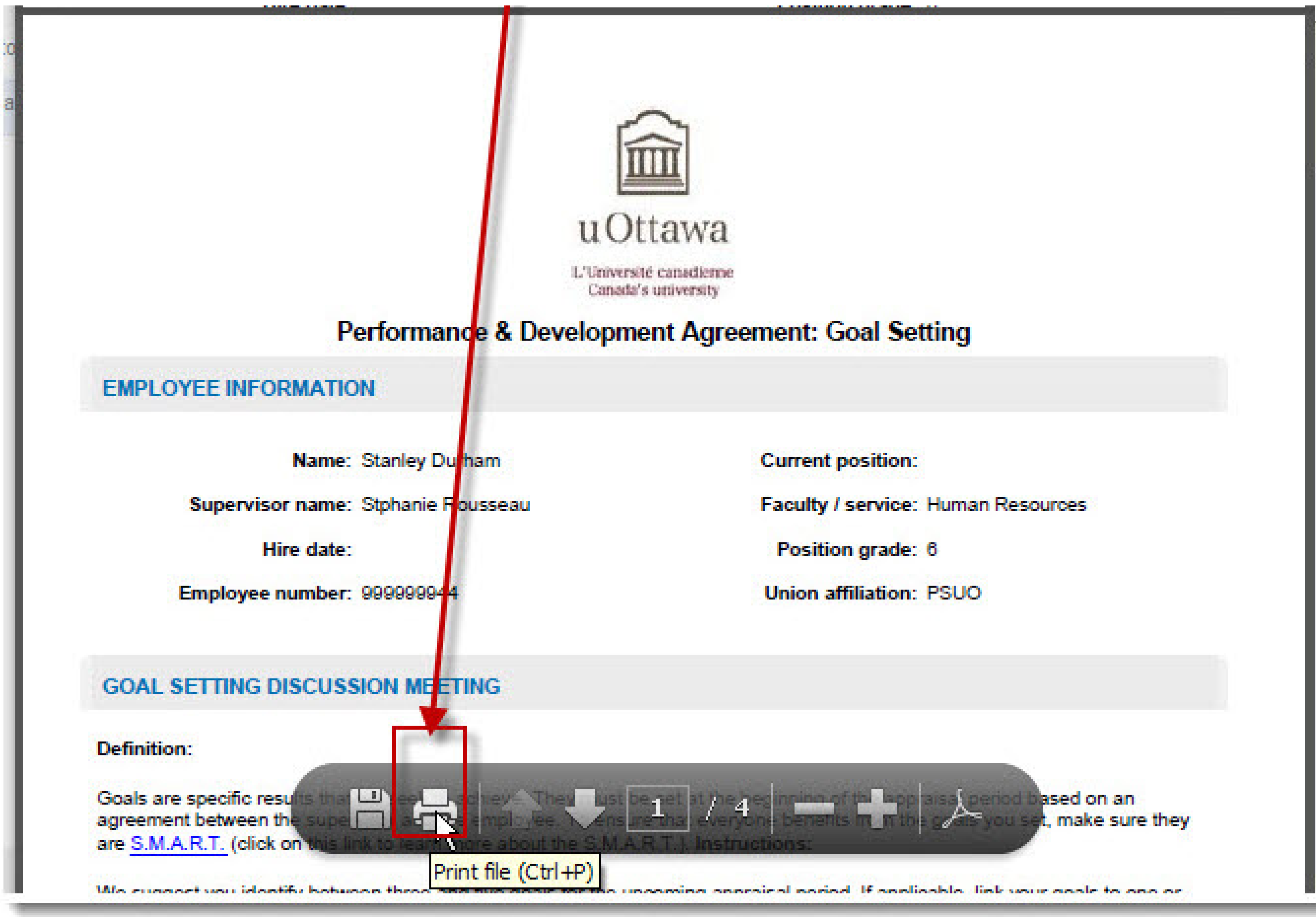
4. Click on the name of the form to be printed in order to create a PDF document.



5. Once the PDF form appears, place your curser at the bottom of the document to view the translucent Adobe toolbar.

6. Click on the printer icon on the toolbar.

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



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 :

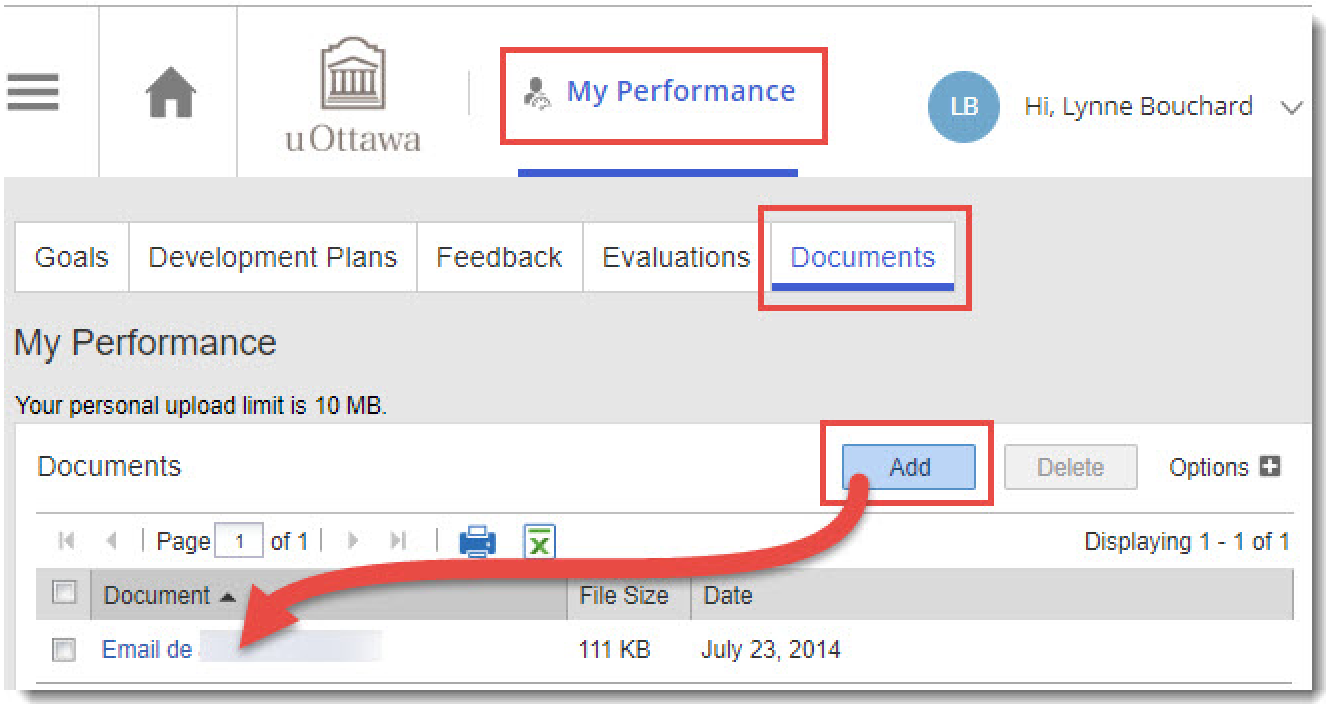
- .PDF
- .DOC

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

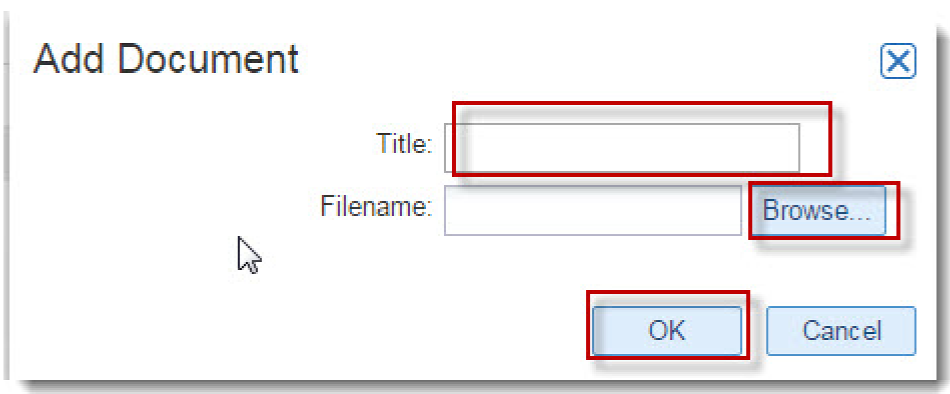
1. Click the Main Menu Icon .

2. Select My Performance.
3. Select Documents.

4. Click Add.

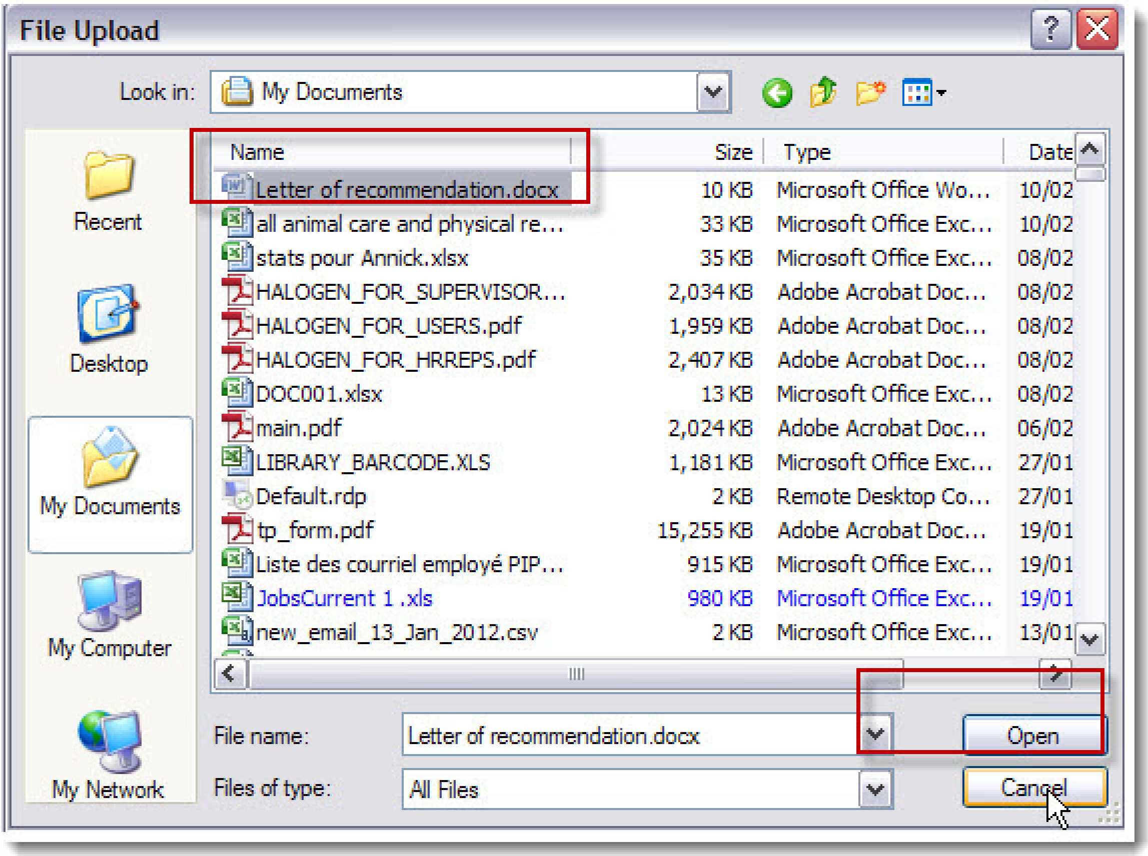


5. Enter a title for the document in the Title field.
6. Click Browse.



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

8. Click Open.

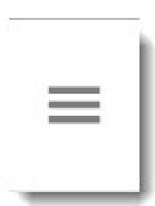


9. Click OK.

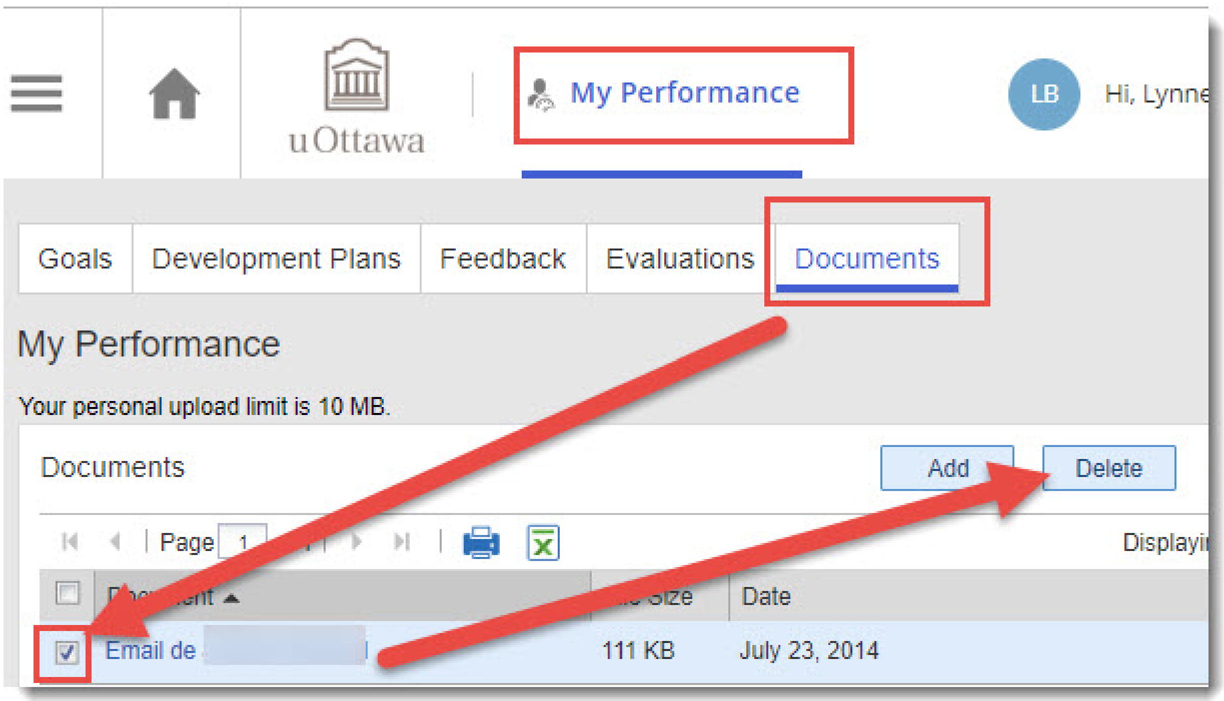
Deleting a document

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.



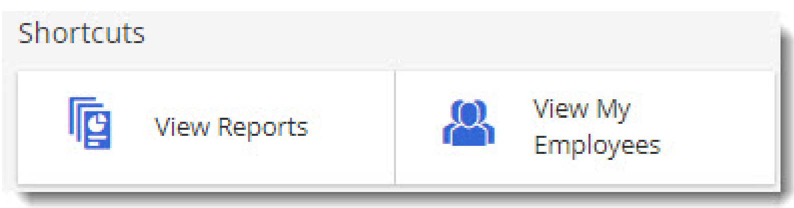
5. Put a checkmark in the box next to any documents to be deleted.
6. Click Delete.

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.

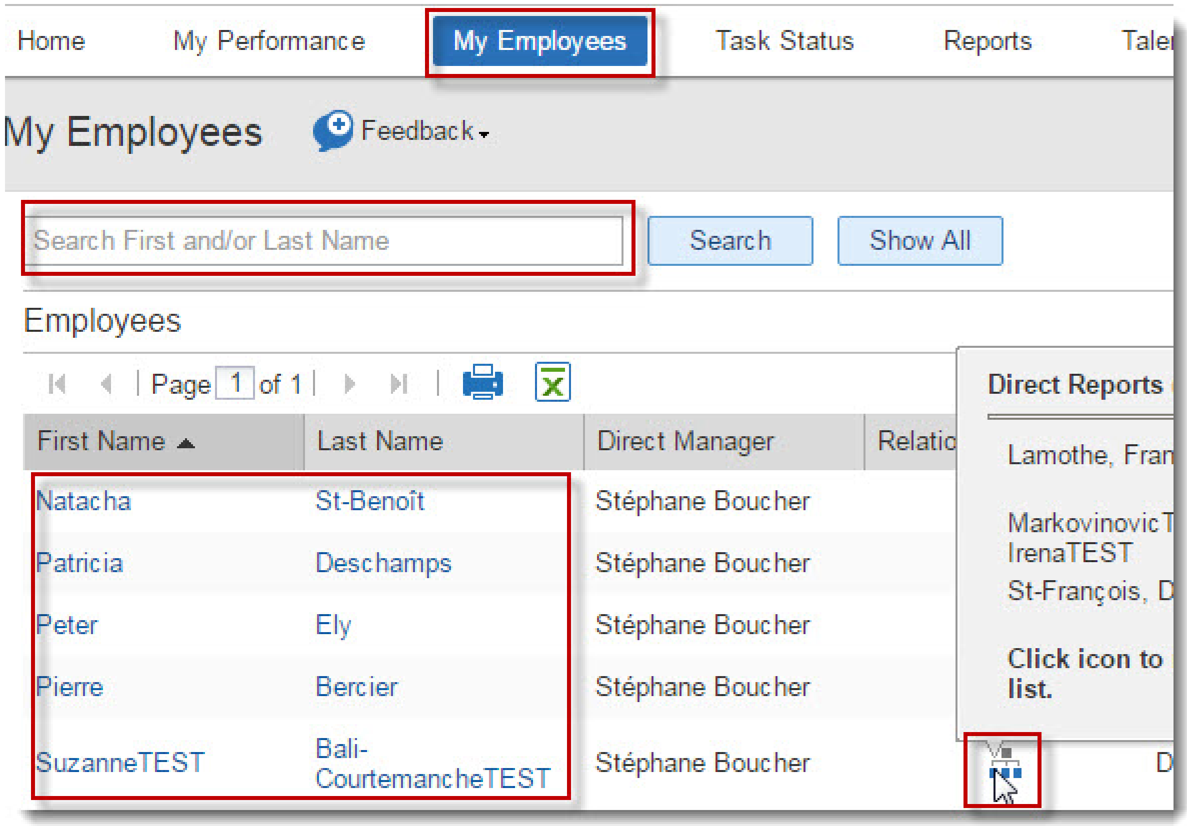
Supervisors responsible for many employees can enter a full or partial employee name in the search box, use the advanced search function or activate a list filter.



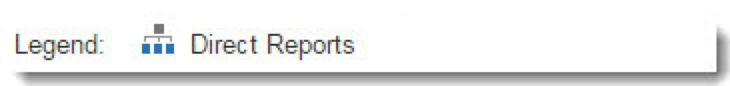
A supervisor can set the filter to show the records of Direct Reports or All Reports. Therefore, supervisors can view:

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).



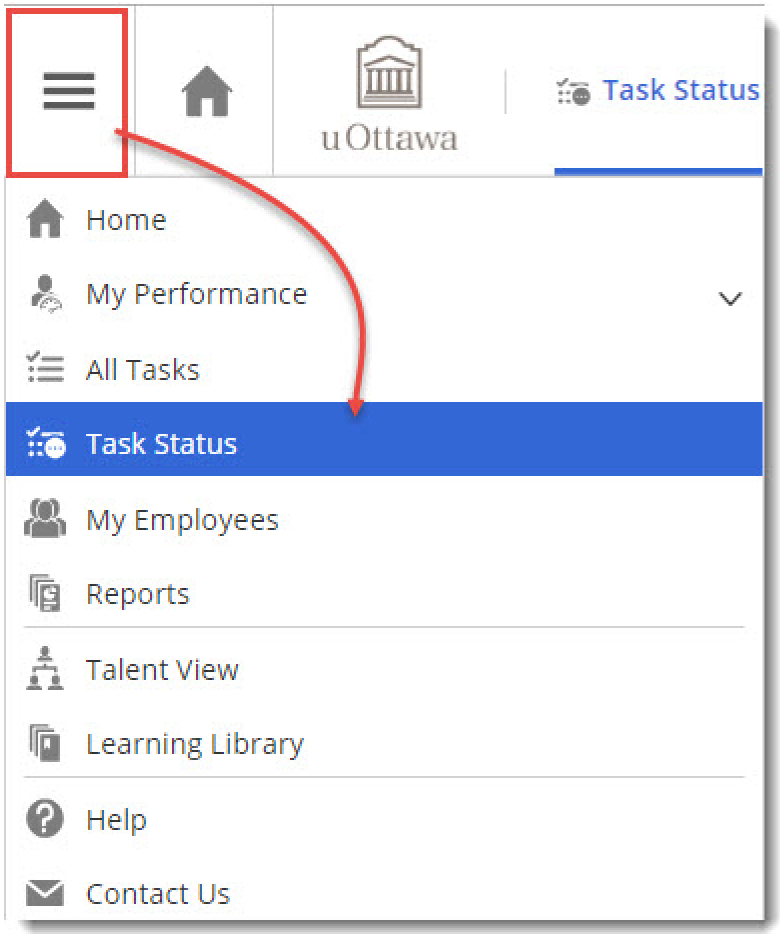
The icon legend appears at the bottom of the My Employees page.



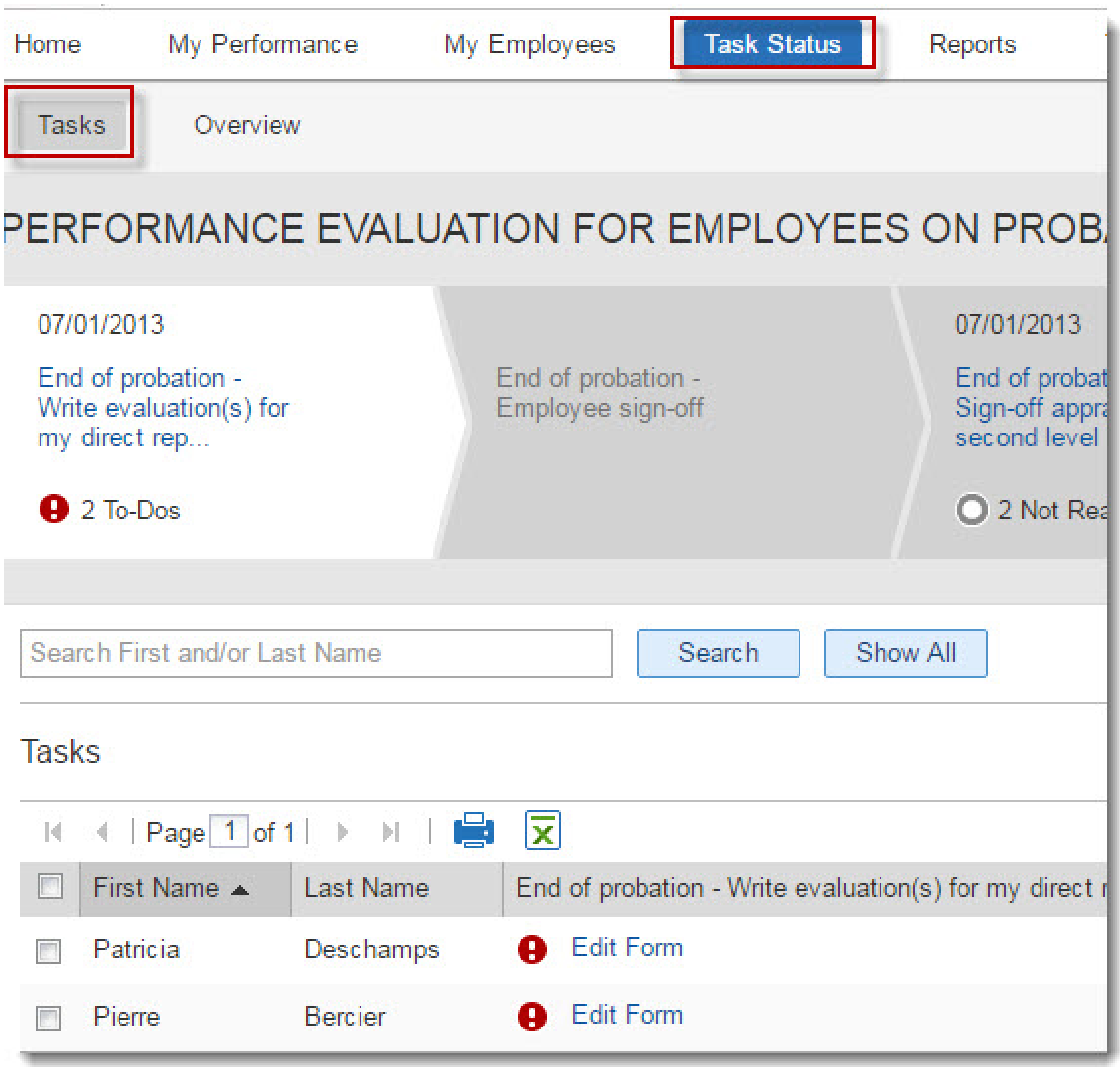
Task status

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.

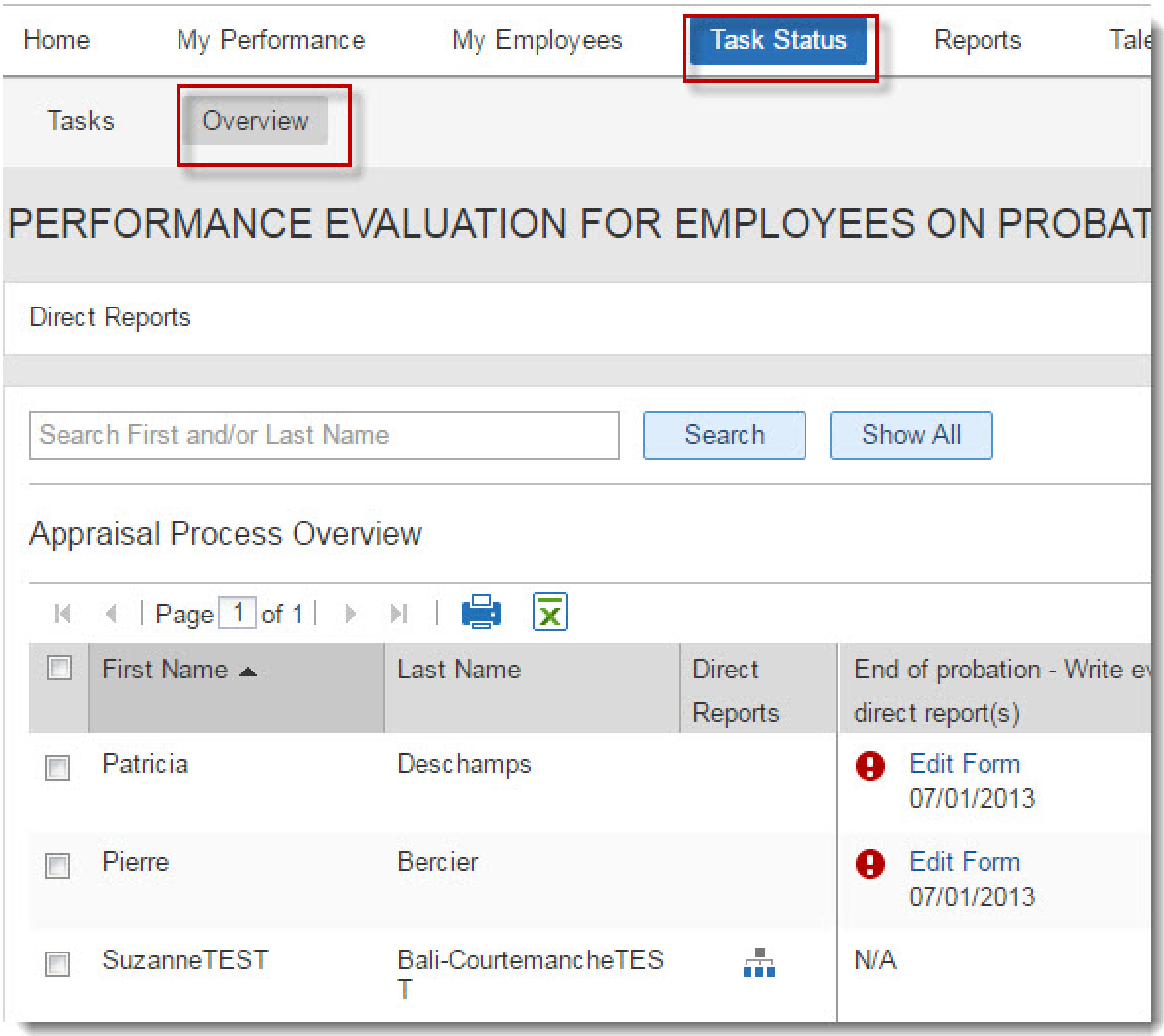


Note, however, that the overview **is available only for the supervisors and administrators responsible for a particular process and the employee involved in the process.**



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

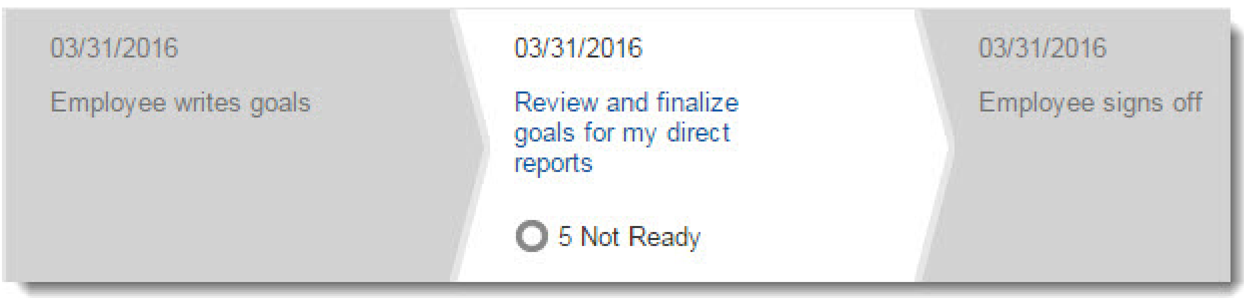
The example below shows that three employees have to complete the goal setting process and one has already completed it.


Home
My Performance
My Employees
Task Status
Reports
Tasks
Overview
PERFORMANCE EVALUATION FOR EMPLOYEES ON PROBAT
Direct Reports
Search First and/or Last Name
Search
Show All
Appraisal Process Overview
Page 1 of 1
First Name
Last Name
Direct Reports
End of probation - Write e
direct report(s)
Patricia
Deschamps
Edit Form
07/01/2013
Pierre
Bercier
Edit Form
07/01/2013
SuzanneTEST
Bali-CourtemancheTEST
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

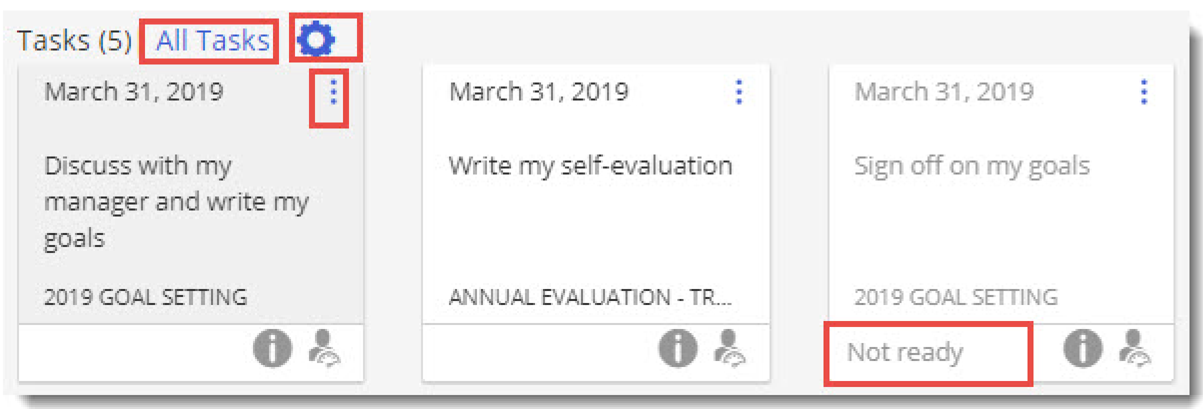
The employee approves the goal setting form. The form is now marked completed.

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.

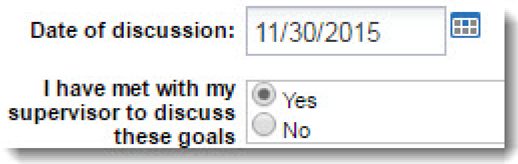
Drafting goals (employees):

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

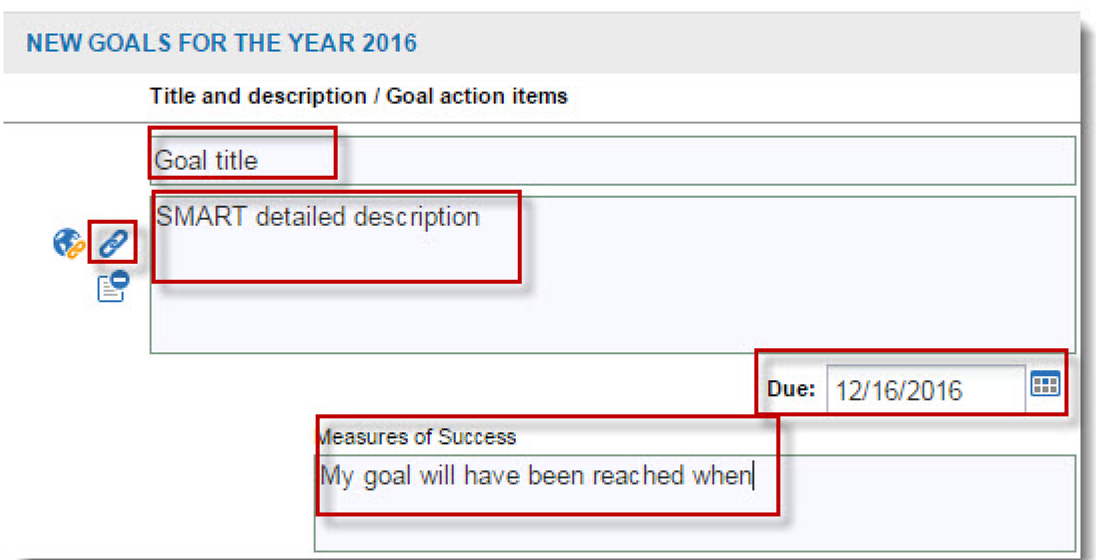
3. Select Yes to confirm that the meeting was held and that the goals were discussed with the supervisor.



Adding a goal

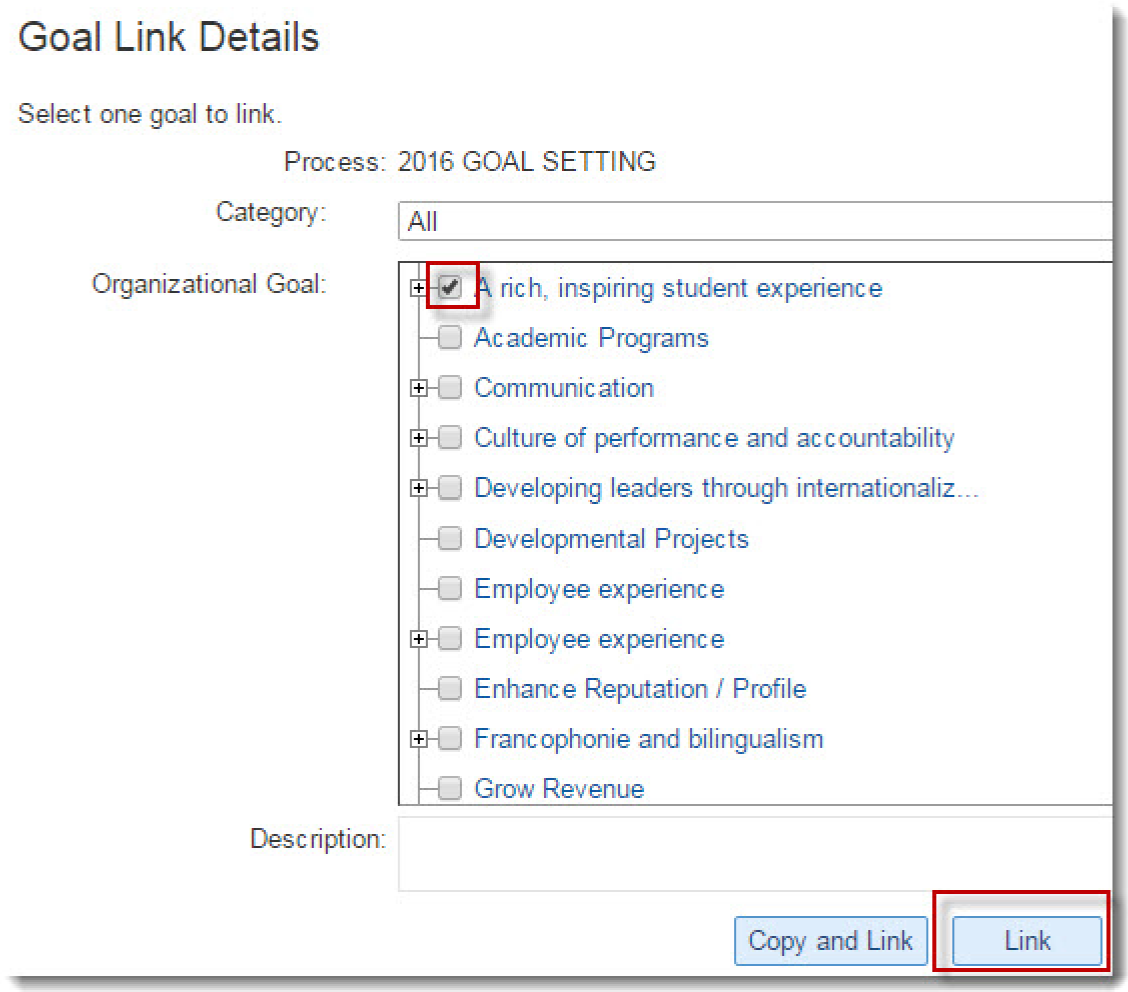
All employees must write up their goals at the start of the annual performance management cycle. Halogen allows the employee to enter up to five goals. The steps below describe the process for drafting and editing a goal (for employees) and for editing a goal (for supervisors):

1. Under the heading Title and description / Goal action items, type the title of the first goal.



2. In the second box, type a detailed description of the goal.
3. Click the calendar icon next to the Due box and select the required date.
4. In the Measures of successs 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.

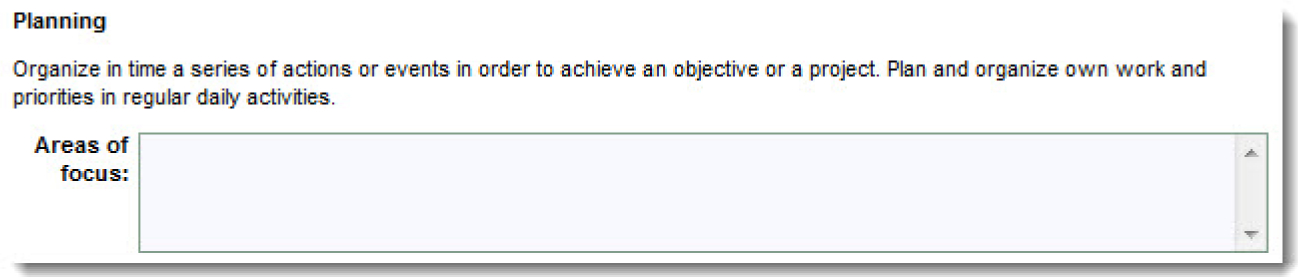


7. Click Link.
8. Click Add New Goal to add a goal.

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.



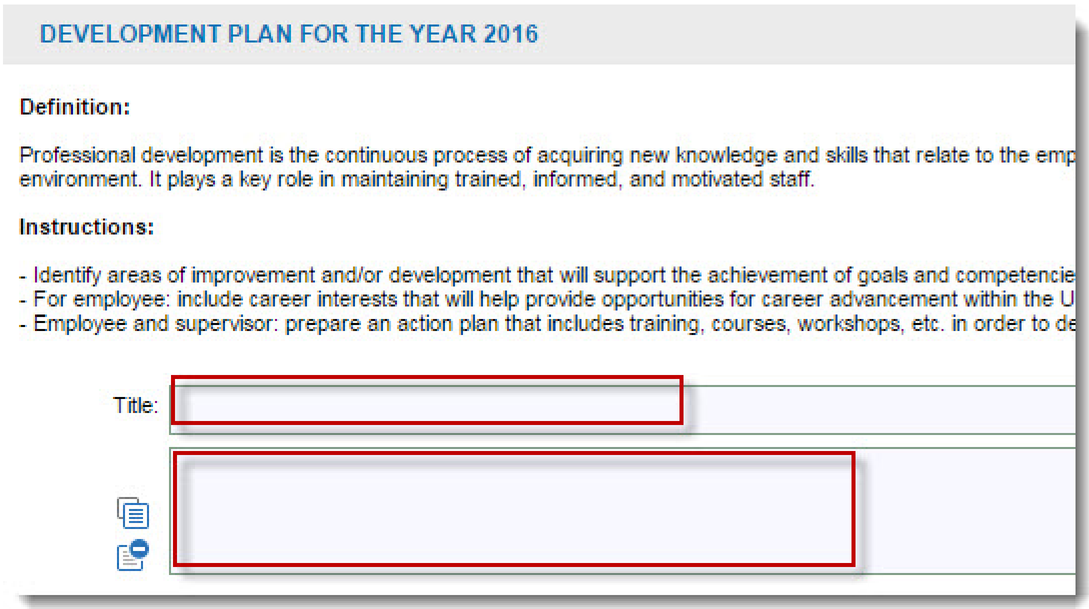
2. Click Add Anotation to attach any comments.

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 emp
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 competencie
- For employee: include career interests that will help provide opportunities for career advancement within the U
- Employee and supervisor: prepare an action plan that includes training, courses, workshops, etc. in order to de

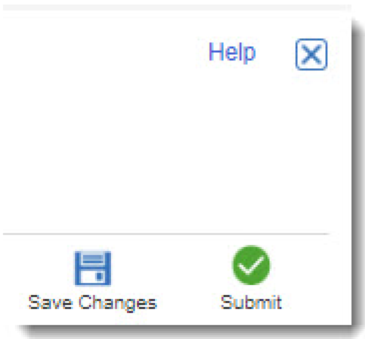
Title:

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.



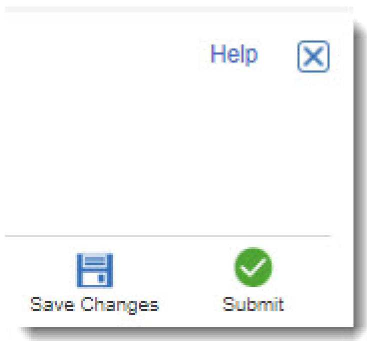
2. Click OK

.

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



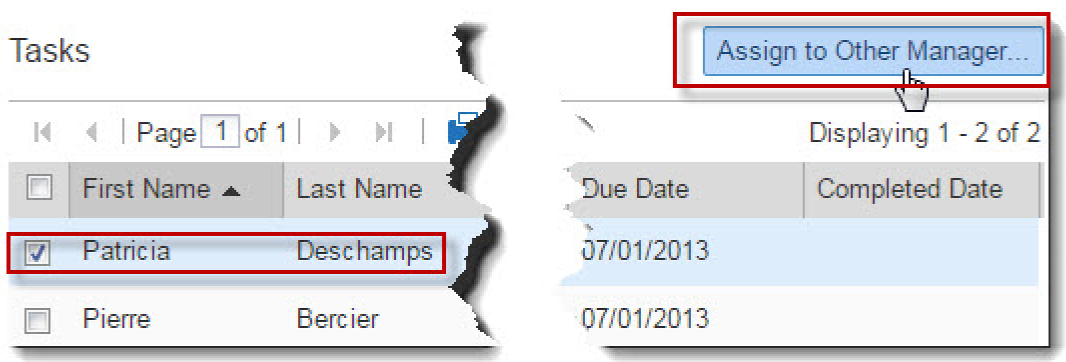
Reviewing and approving goals

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.

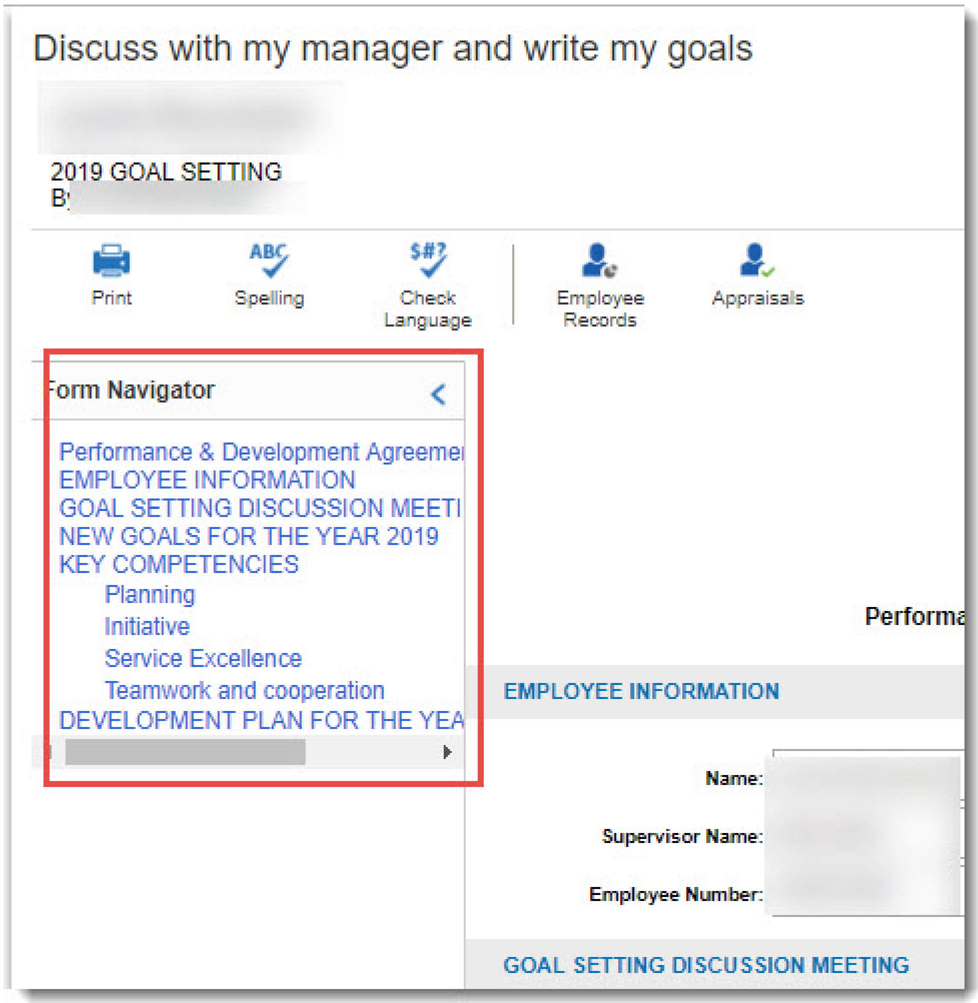
   a. Put a checkmark next to the name of the employee whose form must be assigned to another supervisor.

   b. Click on Assign to Other Manager.



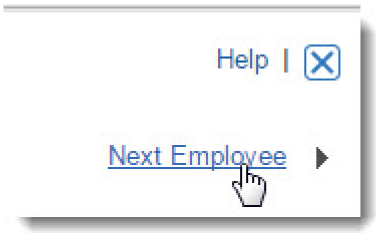
2. Click Edit Form.
   Halogen opens the employee's completed form and the supervisor can modify it.

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.



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.

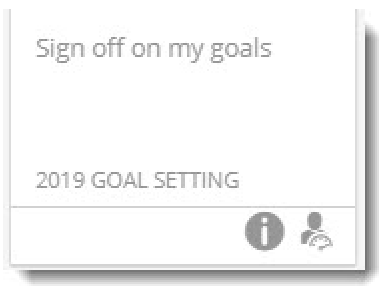
8. Click Approve to send the form back to the employee for the employee's final sign-off.
9. Click X in the red box to close the form.
10. (Optional) Click Next Employee (if there is more than one employee whose form needs to be reviewed and approved).



Employee final approval

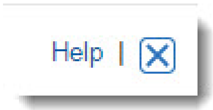
Once a supervisor has reviewed and approved an employee's goal setting form, the supervisor sends the form to the employee for approval. The employee must:

1. Click Sign off on my goals.



2. Click Sign Off.
3. Click OK.

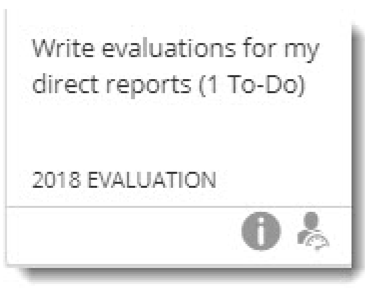
4. Click on the X to close the form.



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

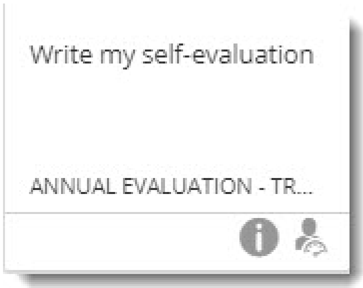
   c. Second level supervisor adds comments

   d. Supervisor signs-off the evaluation

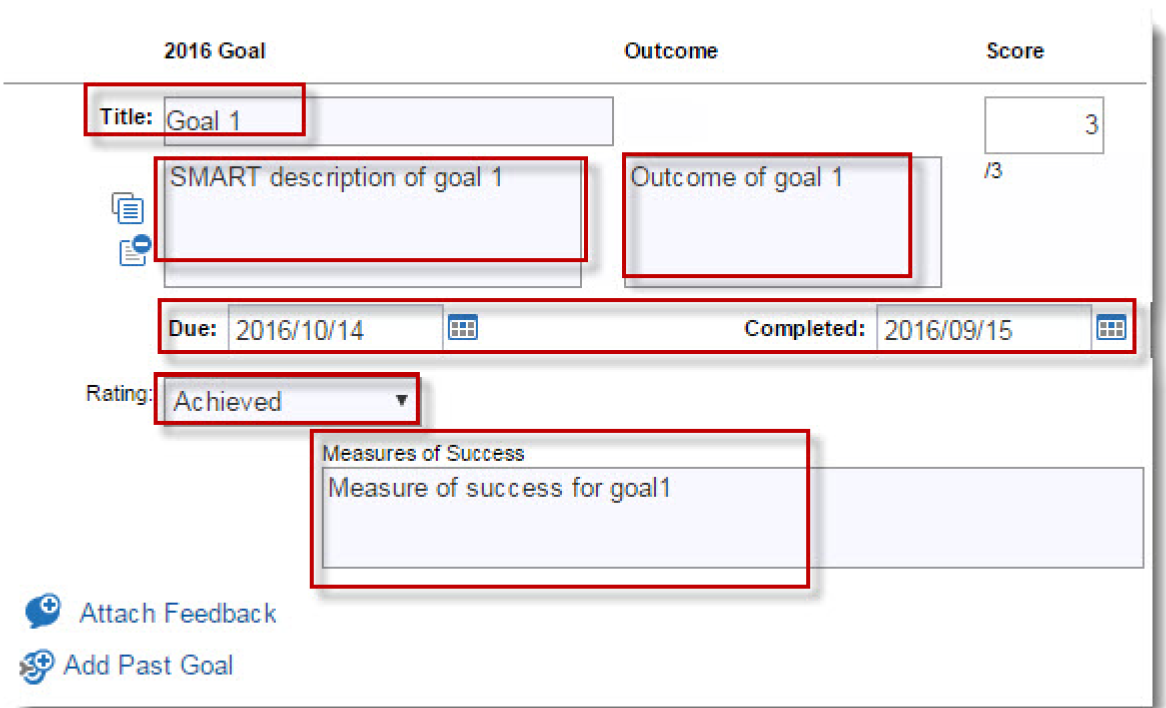
   e. Employee signs-off

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.



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.



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 explains how to do this.

   a. Click My Performance tab

   b. Click Evaluations tab

   c. Click Goal Setting.

   d. Simultaneously press on the following keyboard keys ***SHIFT CTRL S*** to be able to save your form on your desktop

   e. Select the directory where the file needs to be saved and write a name of your document.

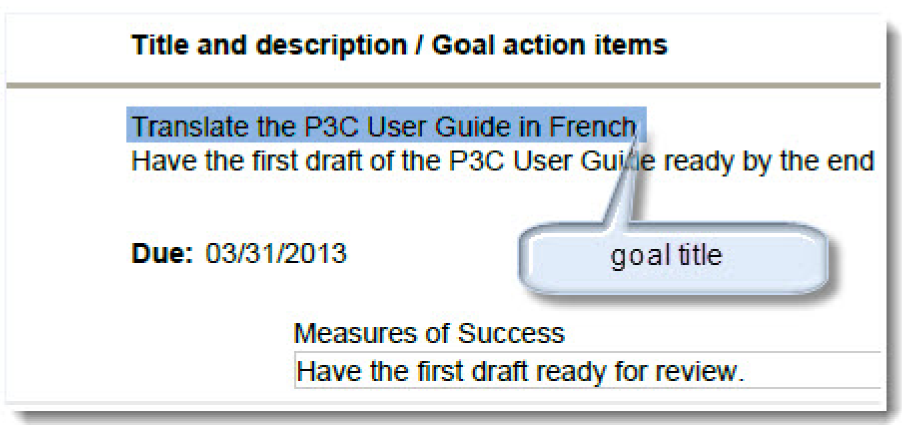
   f. Close the PDF form opened with Halogen by clicking on the red box with the X located in the upper right section of the form.

   g. Click on the Halogen Home tab.

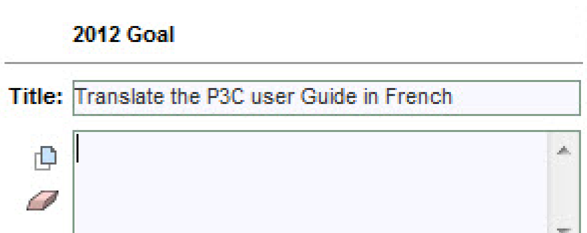
   h. Click on Write my self-evaluation to open the annual appraisal form.

   i. Open the PDF form that you have saved on your desktop.

   j. Go to the goal section of your PDF form and select the goal Title and on ***CTRL C*** on the keyboard.



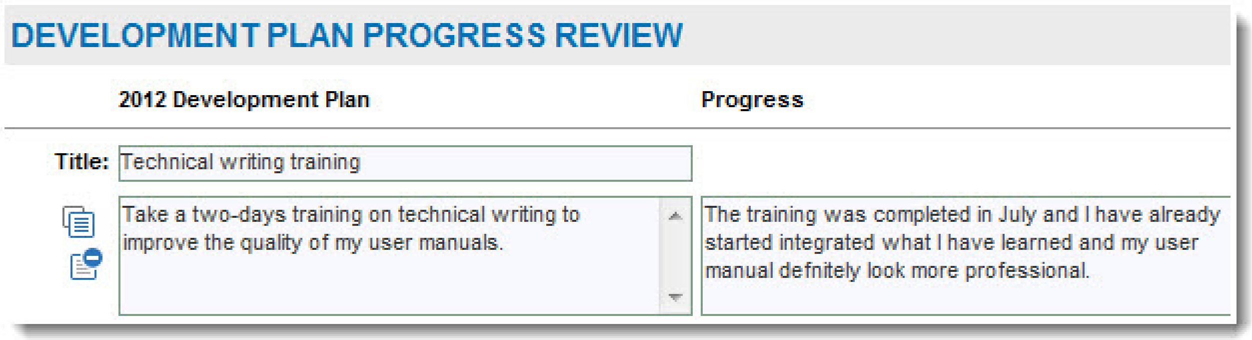
   k. On the evaluation form of Halogen, bring the cursor in the box where the goal title must be typed and simutaneously press on ***CTRL V*** to insert the goal title.



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:
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.		Meets the Competency ▼	3
Initiative 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
Service Excellence 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
Teamwork and cooperation 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

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

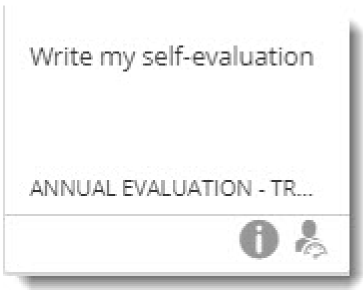
	2012 Development Plan	Progress
Title:	Technical writing training	
	Take a two-days training on technical writing to improve the quality of my user manuals.	The training was completed in July and I have already started integrated what I have learned and my user manual defnitely look more professional.

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 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. 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.

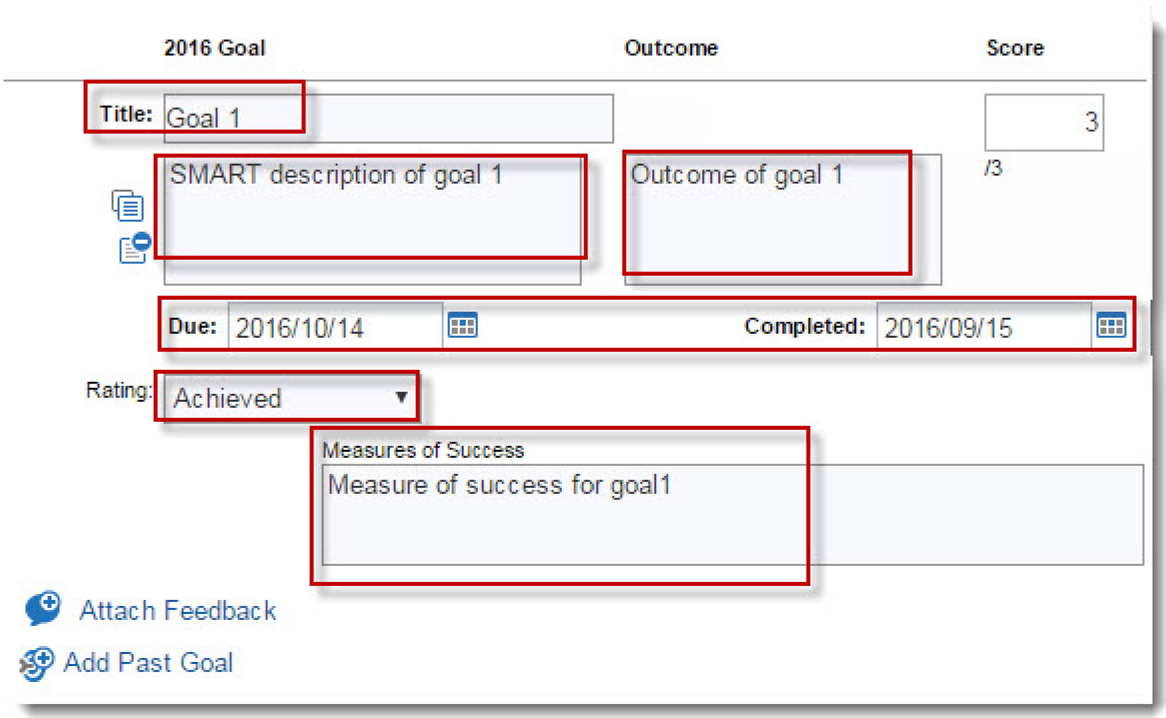
Steps for the self-appraisal process

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 yo 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.



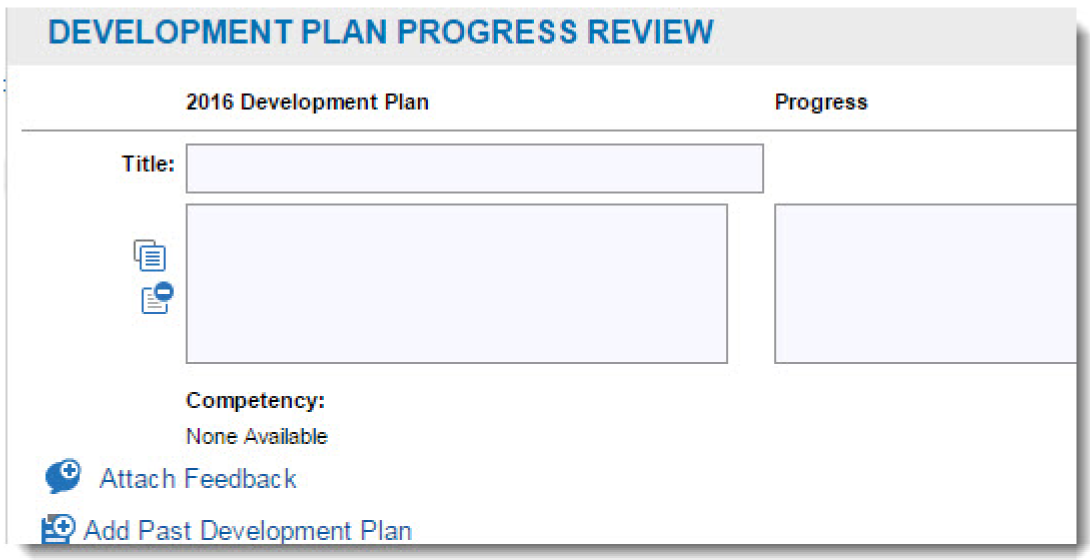
3. (Optional) Type a detailed description in the box under the goal Title.
4. (Optional) Type a comment in the box Outcome.
5. Enter the date when the goal was achieved in the box Completed.

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:
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.		Meets the Competency ▼	3
Initiative 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
Service Excellence 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
Teamwork and cooperation 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 Iniative 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.

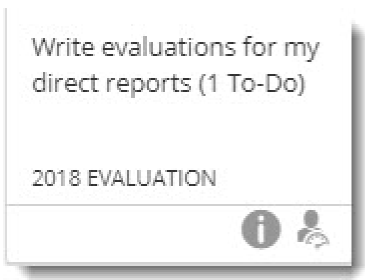


18. (Optional) Type a detailed description in the box under Title.
19. (Optional) Type a comment in the Progress box.
20. (Optional) Type a comment related to your performance in the Employee's Comments box (you can also wait to enter your comment when you give your final approval to the appraisal).
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.

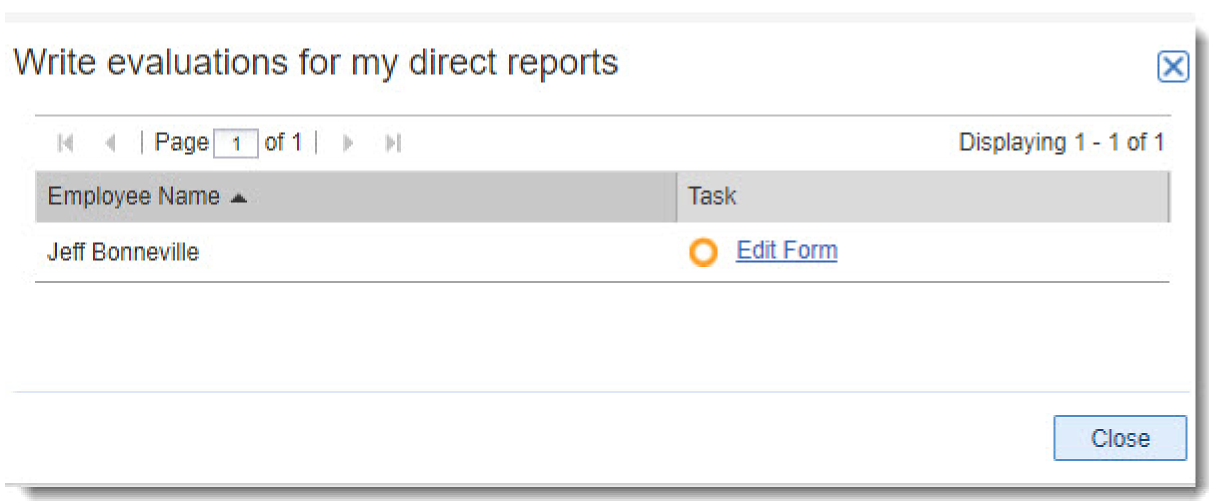
23. Click on OK to confirm that you no longer need to modify the form.

Revision of the self-appraisal by the supervisor

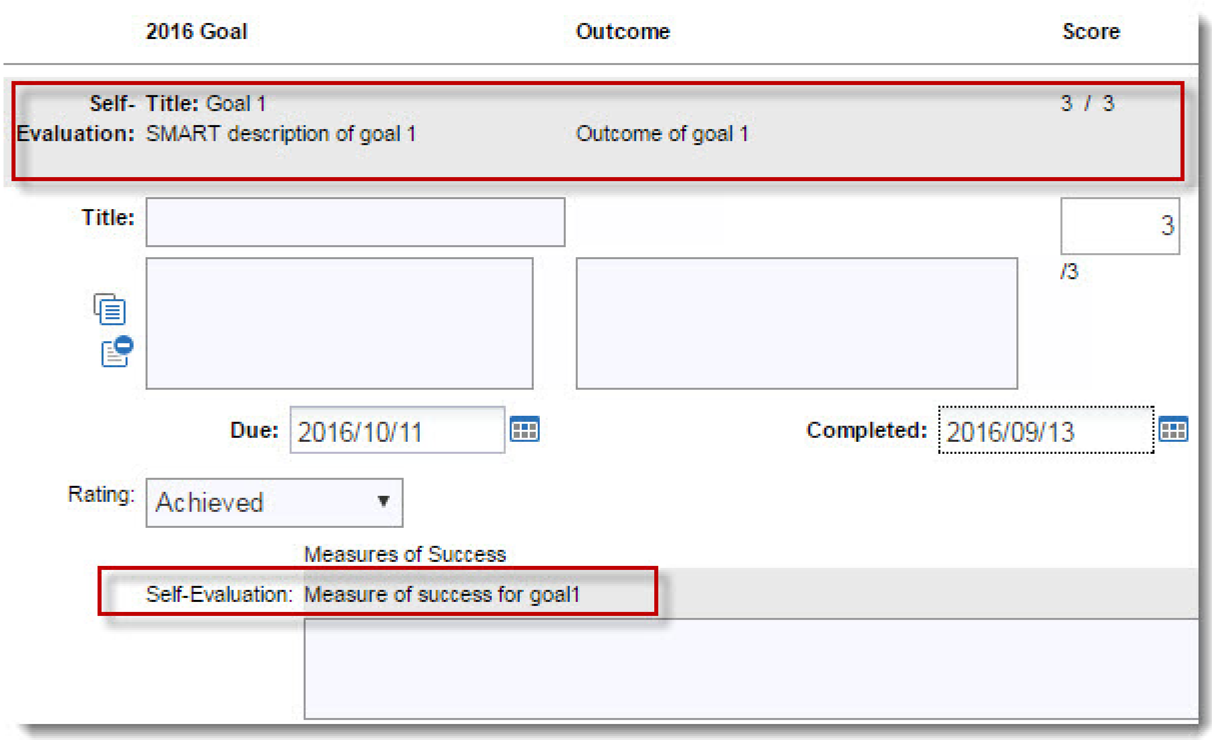
1. Once the self-appraisal form has been submitted by the employee, it is assigned to the supervisor.
2. This step is started on the Home tab by clicking on Write evaluations for my direct reports.



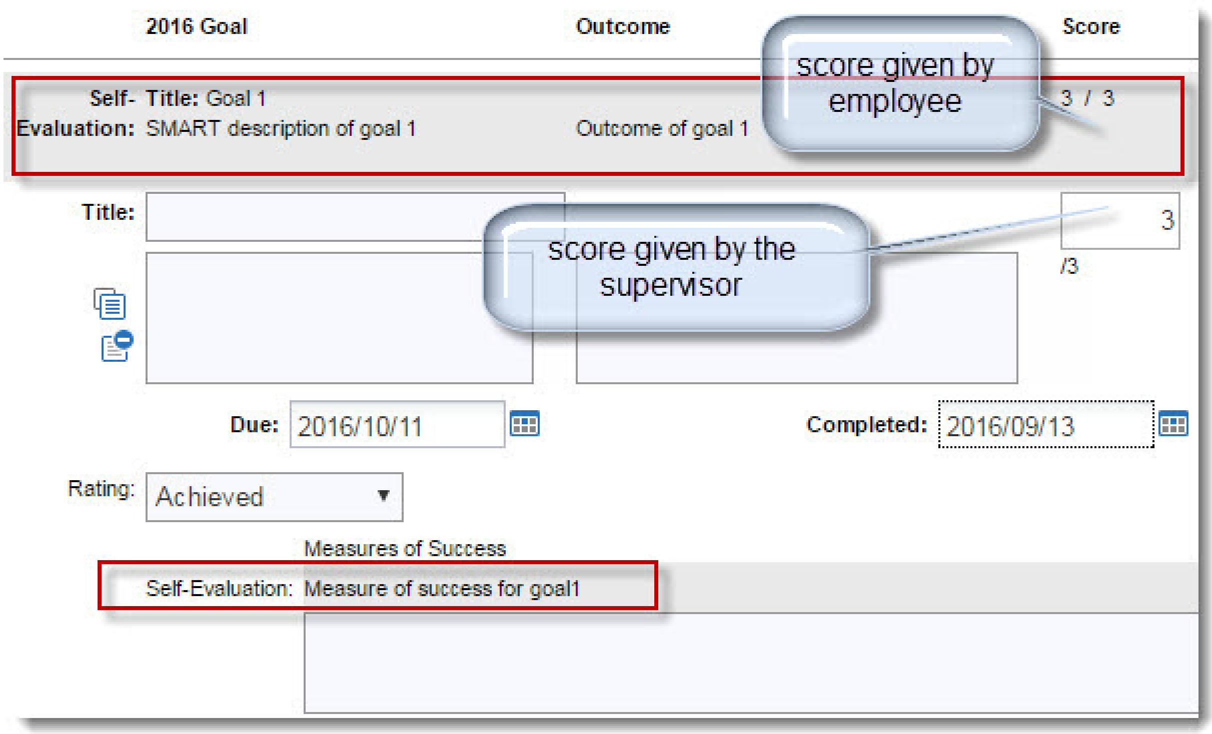
3. The supervisor clicks on Edit Form to begin the step.



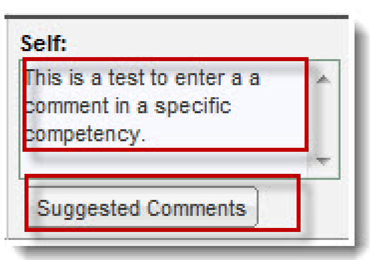
4. The form displays what was written by the employee in shaded areas titled Self-Evaluation. The supervisor can add content in the boxes under the shaded areas.



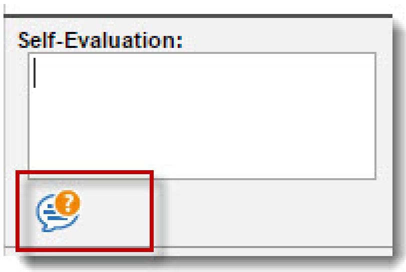
5. The score entered by the employee for each goal is also displayed in the Self-Evaluation shaded area. The supervisor must select the level of achievement using the Rating drop-down list of the Goal section.



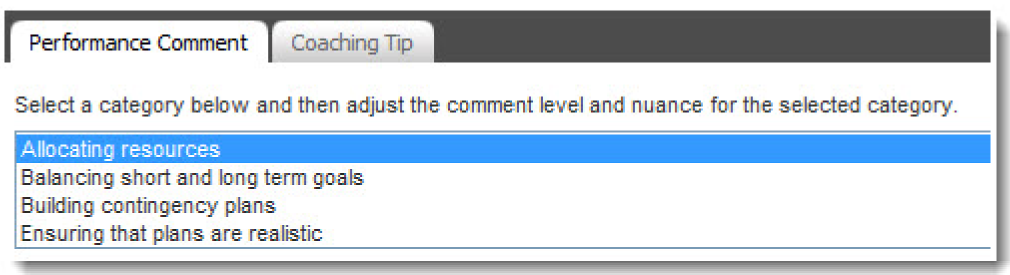
6. The supervisor can enter comments for each key competency in the boxes located under the word Self:. If the employee has added a note in Area of focus on the Goal setting form, it will be displayed beside the word Self:.



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.

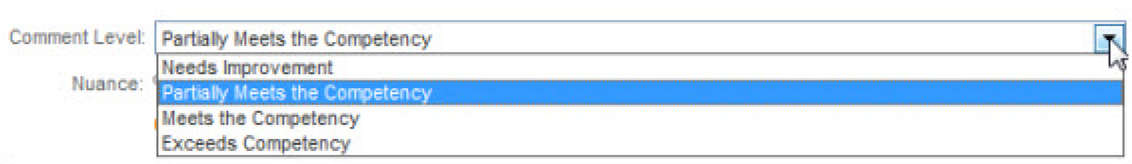


a. Select the category of comment that applies to the employee's position in relation to the compency.



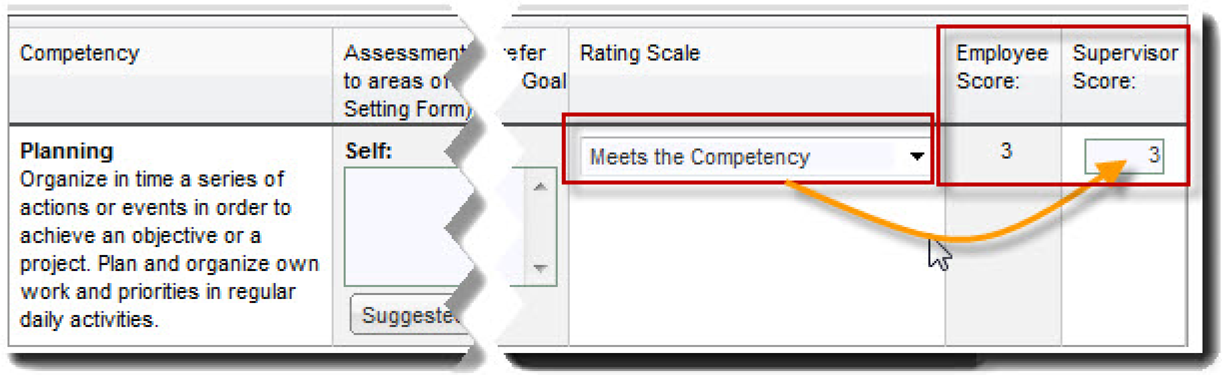
b. Select the employee's gender.

c. Select the achieved level by the employee.

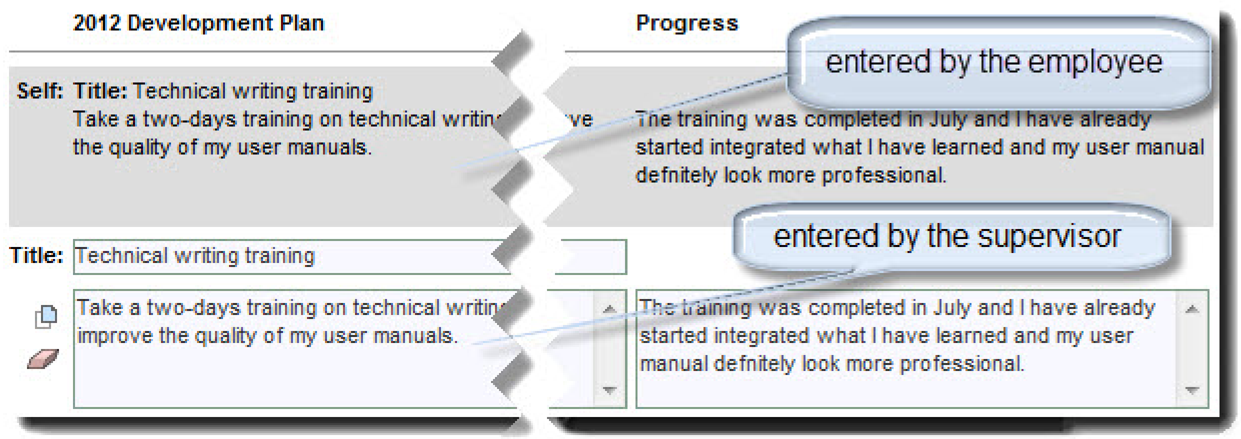


d. Ajust the nuance by sliding the scale bar in order to display the various comments that can be inserted. By sliding the scale bar to the right, you will notice that the suggested comment get more elaborate and more positive.

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



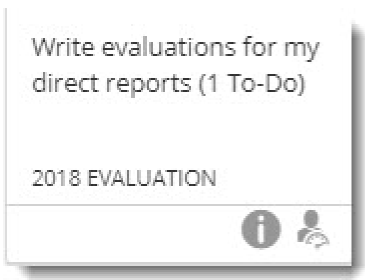
9. The system displays the development plan entered by the employee in the Self: shaded area but the supervisor can add a plan and/or a comment in the appropriate boxes under the Self: section if the employee has not entered one.



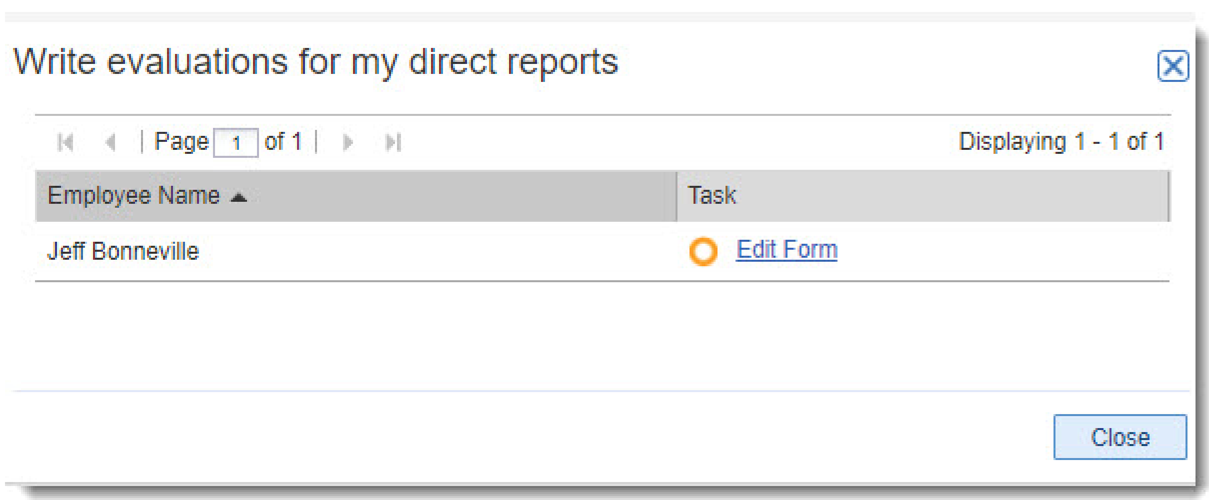
Steps to review of the self-appraisal form by the supervisor

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

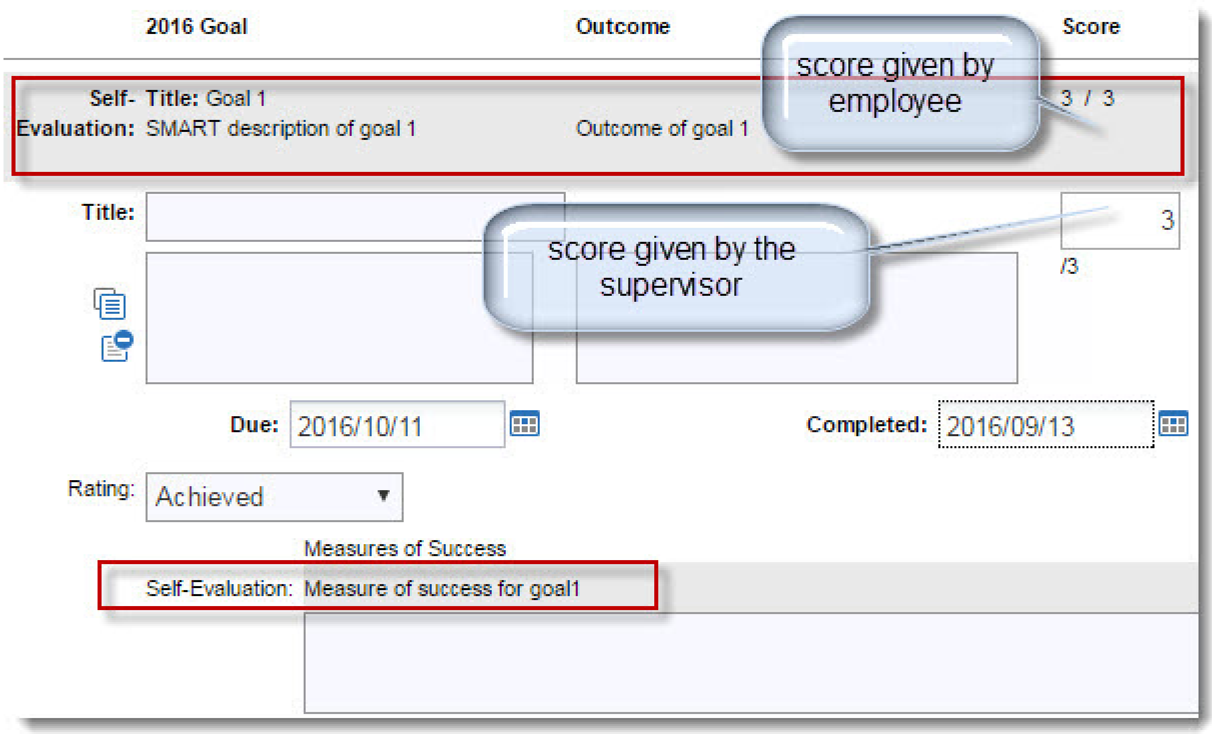
1. Click on Write evaluations for my direct reports.



2. Click on Edit Form.

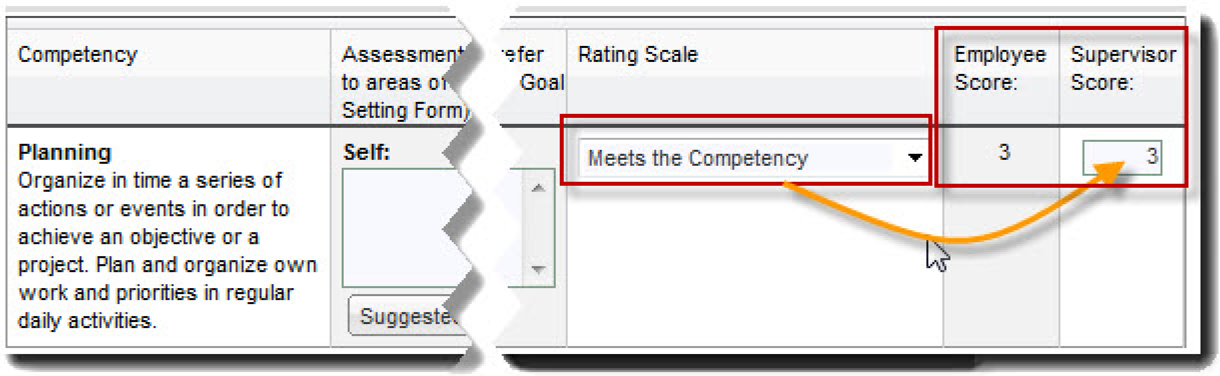


3. (Optional) Type or modify the goal Title.



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.



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.

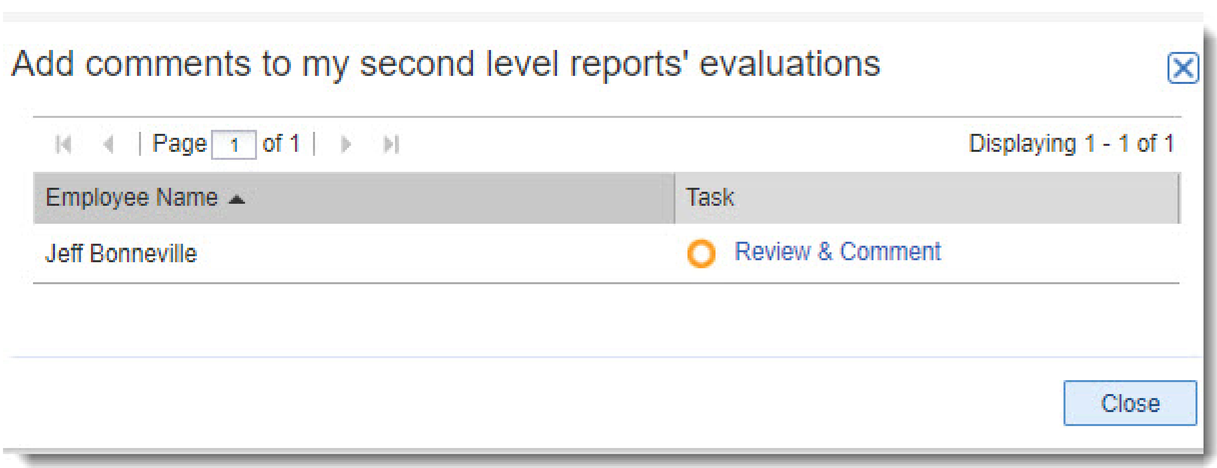
26. Click on OK to confirm that you do not need to modify the form.

Second level supervisor's approval

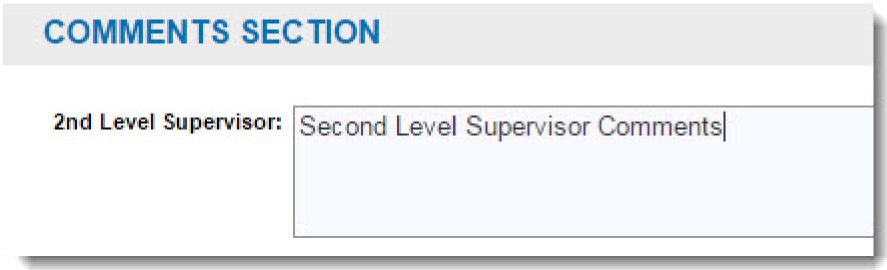
The second level supervisor can add comments in the form. If the second level supervisor has forms to approve, they will appear on the home page in the section Tasks.

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.

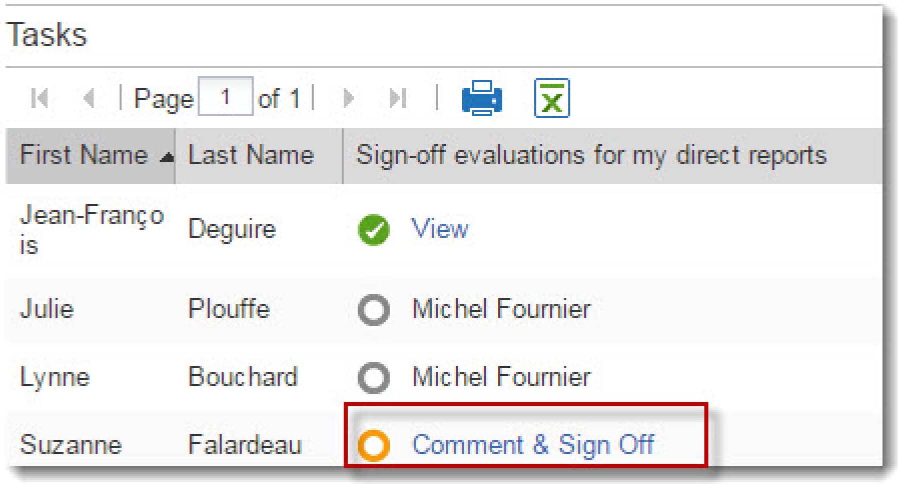


4. Click Save Change.
5. Click Submit.
6. Click OK.

Supervisor's sign off

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

2. Click Comment and Sign Off.



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

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.

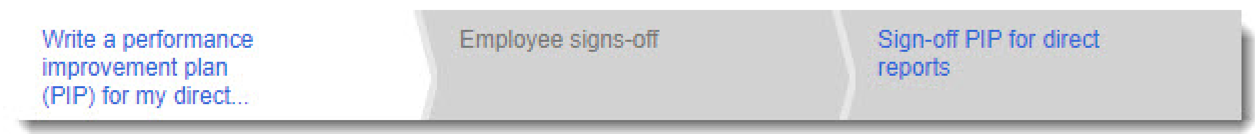
Performance Improvement Plan (P.I.P.)

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 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.

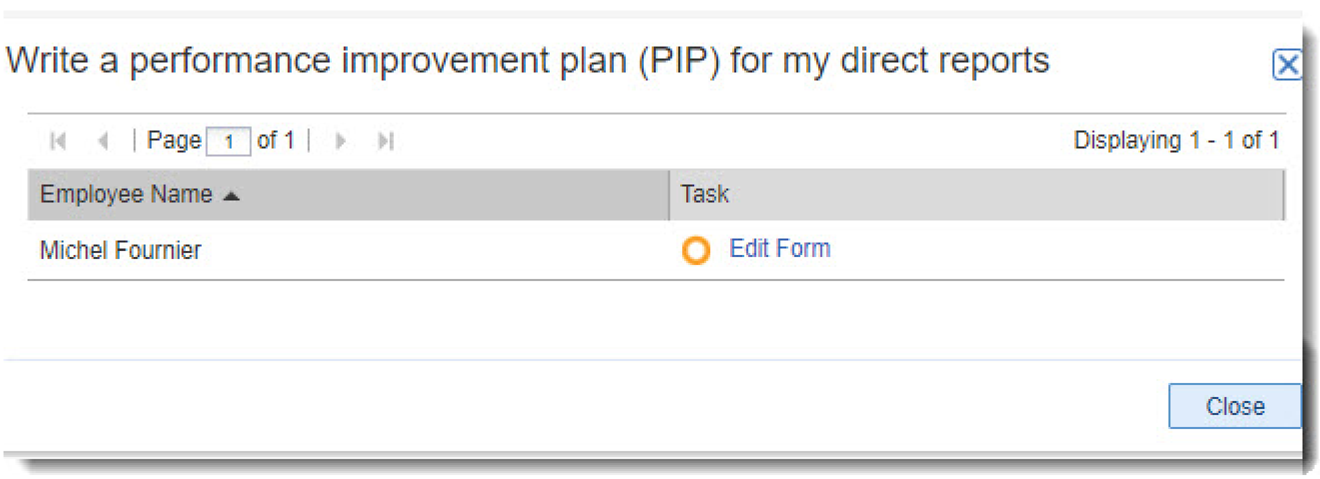
Steps of the P. I. P.

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 .

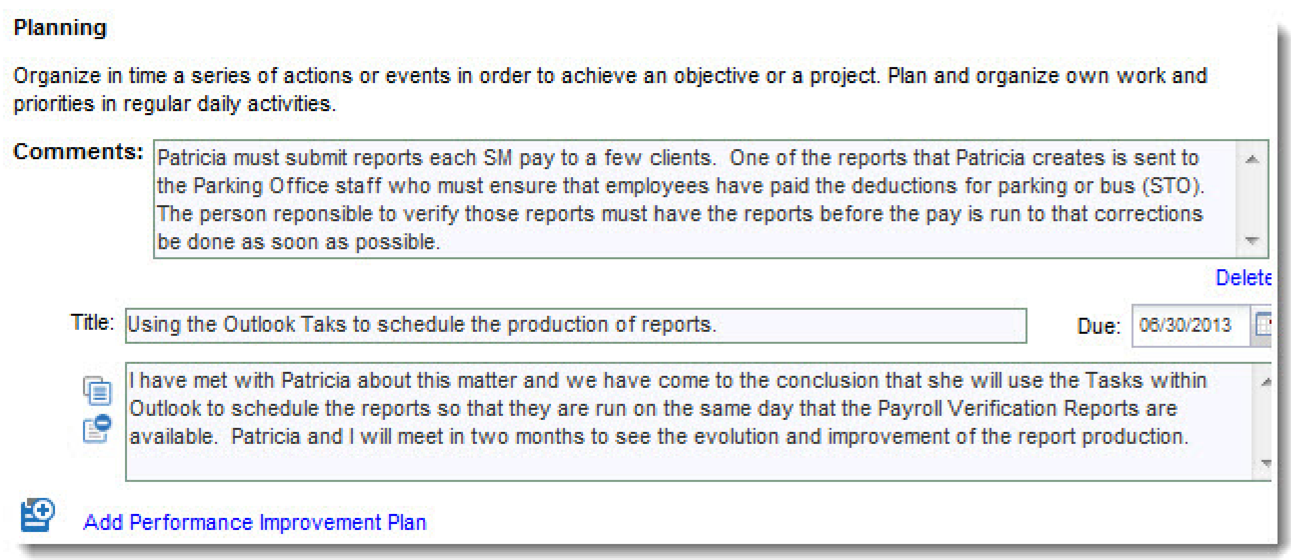
2. Click on Edit Form .



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.

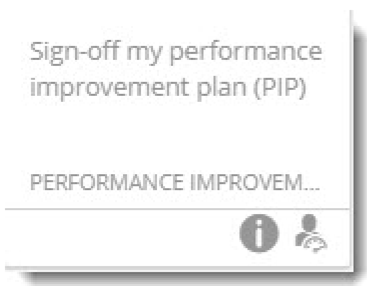
4. Click on Add Performance Improvement Plan.



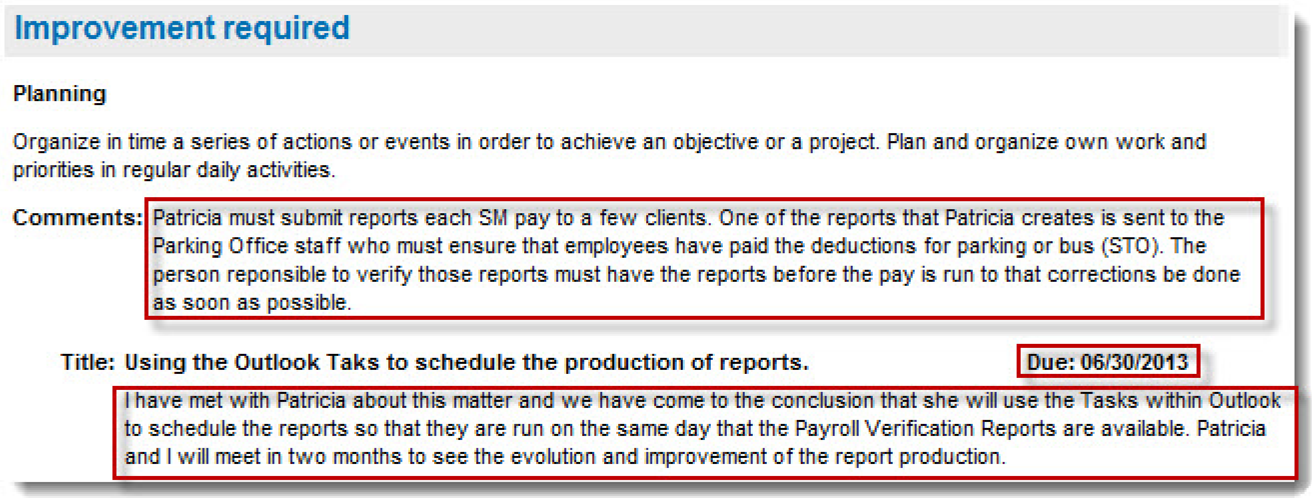
5. Describe the situation demonstrating that the employee must improve the competency in the Comments box.
6. Type a brief description of the performance improvement plan in the box Title.
7. Type a detailed description of the improvement plan in the box under the Title.
8. Enter the Performance Improvement 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

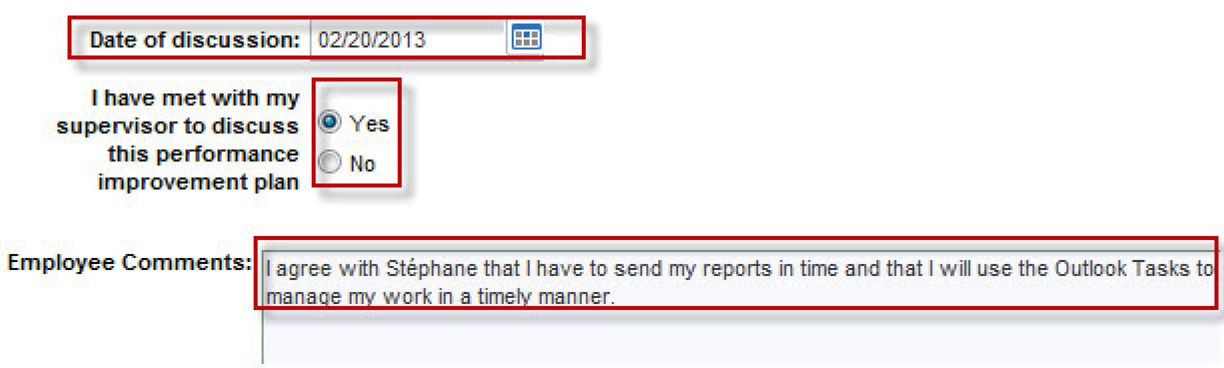
Organize in time a series of actions or events in order to achieve an objective or a project. Plan and organize own work and priorities in regular daily activities.

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 reponsible 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 Taks 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

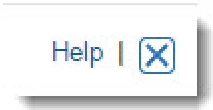
I have met with my supervisor to discuss this performance improvement plan Yes No

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.

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 IdentificationIf the information displayed in this section contains errors, they must be reported by email at the address performance@uottawa.ca [2]

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

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

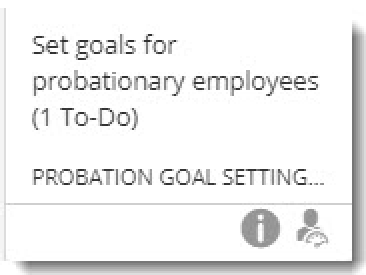
   The supervisor must establish the SMART goals that the employee will need to have achieved by the end of the probationary period. He/she can enter up to five goals.

6. Job Requirements and Key Competencies

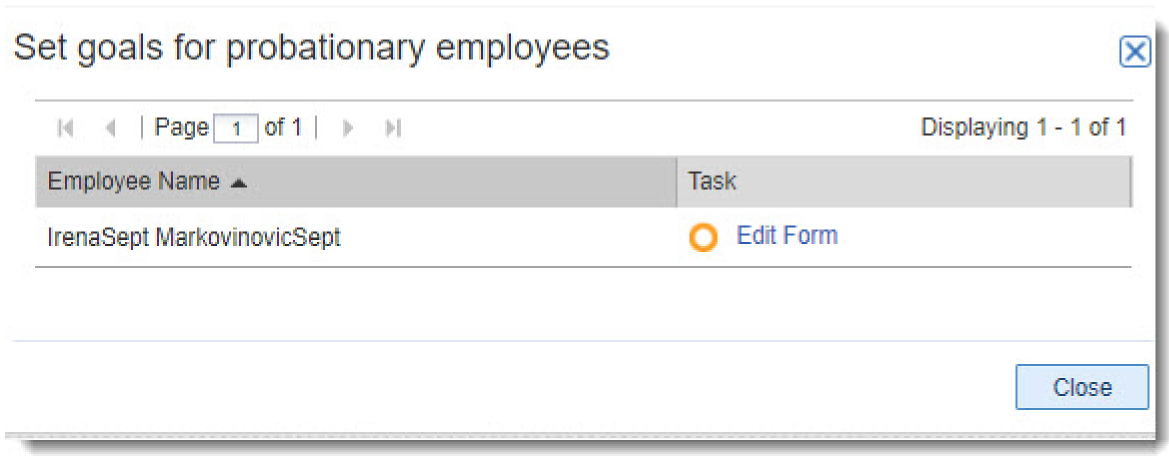
   The supervisor has the responsibility to discuss the job requirements during the probationary period and the key competencies on which the employee will be evaluated at the end of the probation period.

Goal Setting

1. Click on Set Goals for probationary employees.



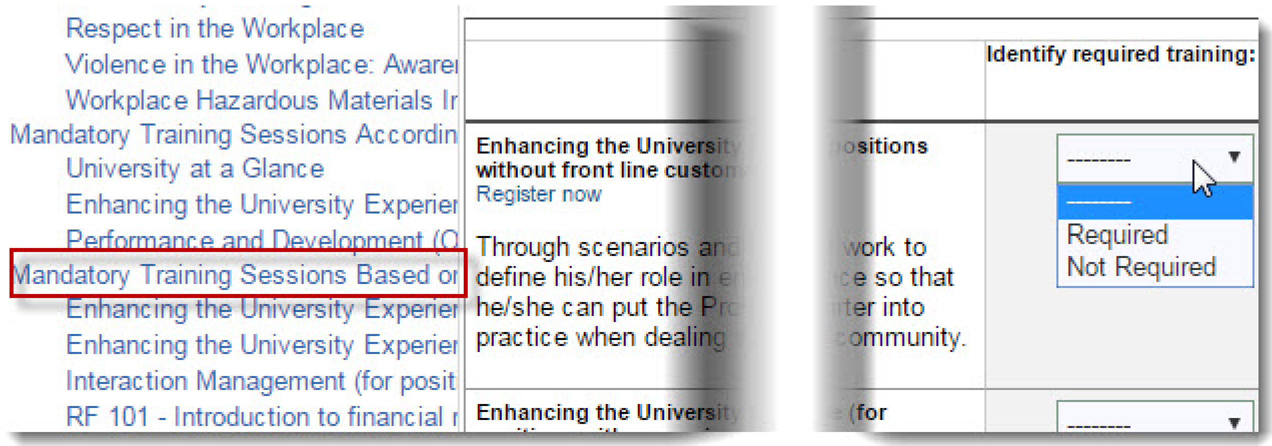
2. Click on Edit Form.



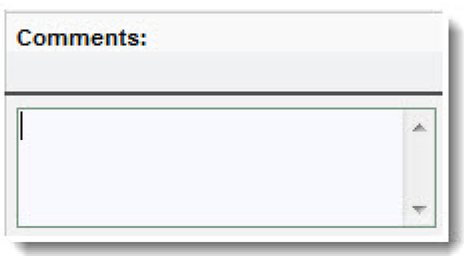
The form is displayed. The supervisor cannot register an employee to a training session, he/she will be able to register when he/she approves his/her probationary goal form.

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

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



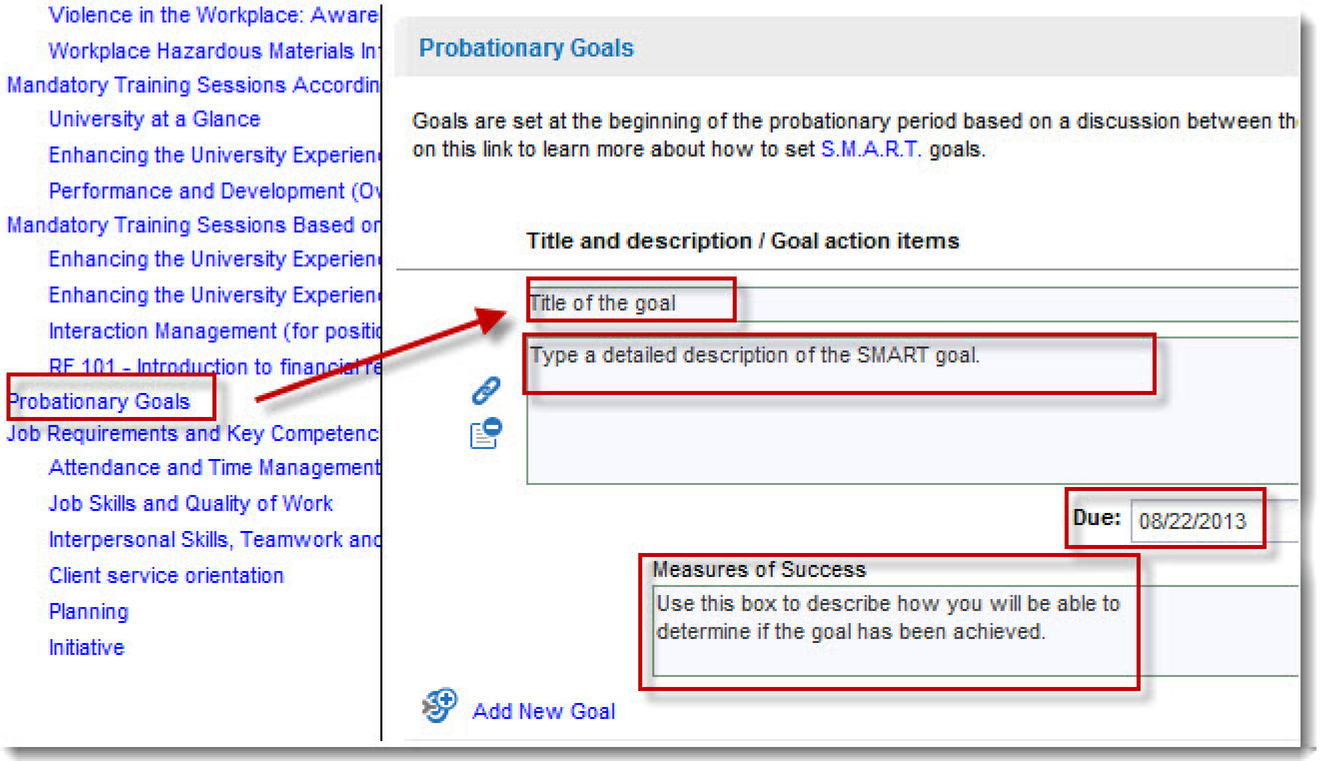
a. (Optional) Add a Comment .



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.



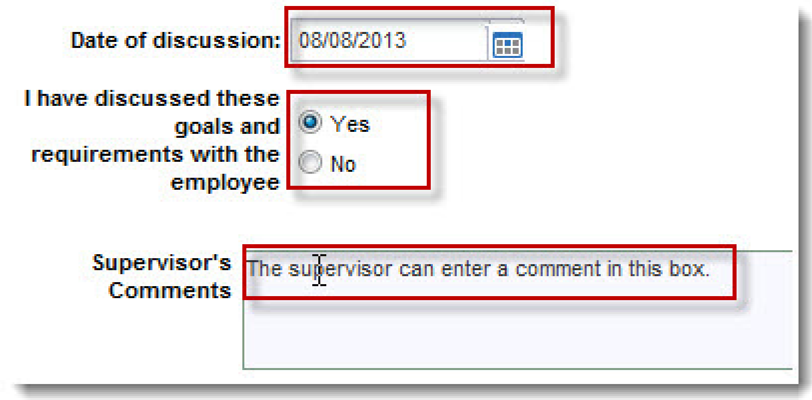
8. Type a detailed Description of the goal and a measure to achieve it, in the second box.

9. Click on the calendar icon of the Due field and select the probation end date.

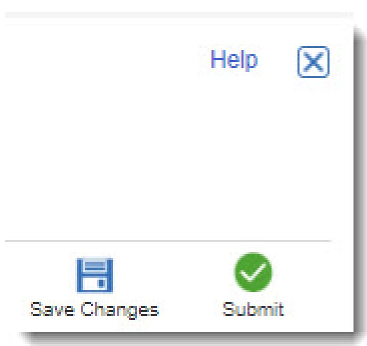
10. Type a measure of success. The measure of success helps the supervisor and the employee determine if a goal has been achieved or not.

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.



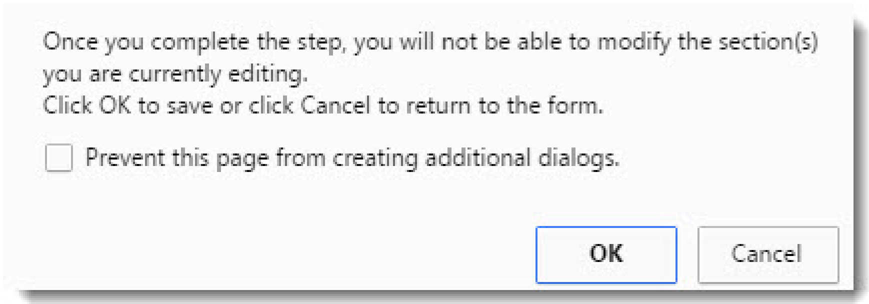
13. Click on the I have discussed these goals and the requirements with the employee option.
14. (Optional) Type a comment in the Supervisor's comments box.
15. Click on Save Changes.



16. Click on OK.
17. Click on Submit.

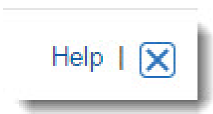
    If you click on Submit, the form is saved and forwarded to the employee for his electronic signature. The form can no longer be modified once it has been submitted.

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.

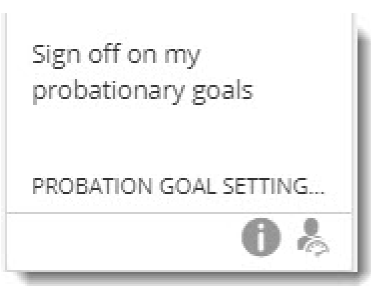
19. Click on the X to close the form.



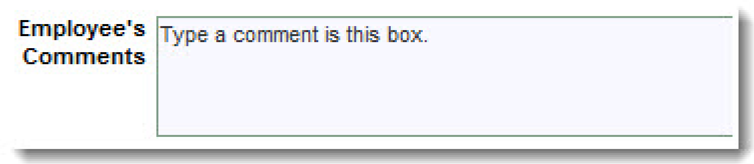
Approval of probation goals

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.

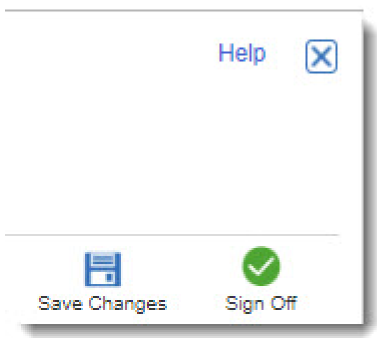
1. Click Sign off on my probationary goals.



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

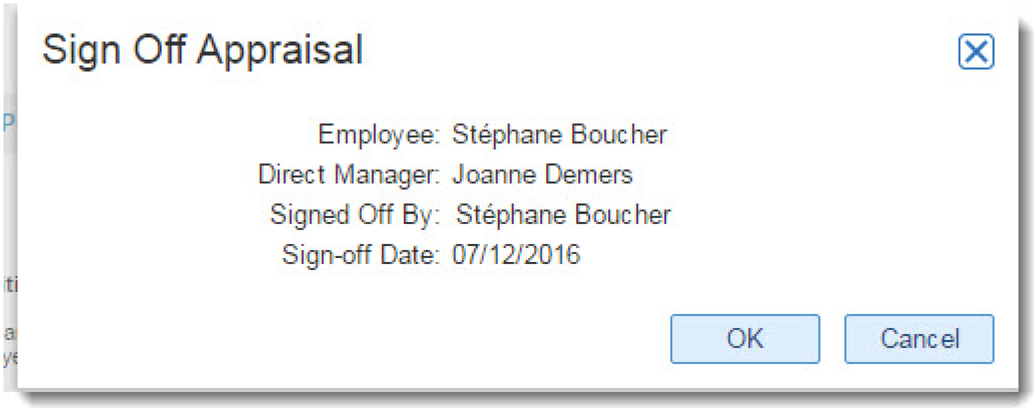


3. Click Save Changes.



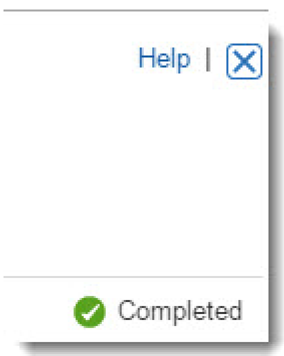
4. Click OK.
5. Click Sign Off.
   If you click on Submit the form is saved and the process is completed. The form cannot be modified once it has been submitted.
6. Click OK.

7. Click Ok .



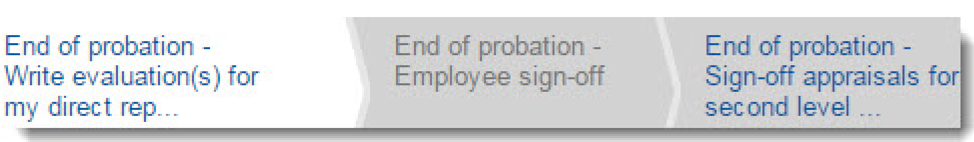
You cannot modify the form after you click on OK. The system will display the completed status.

8. Click on the X to close the form.



End of probation period

The performance evaluation for employees on probation process completes the probation process.
The performance evaluation for probation has three steps.

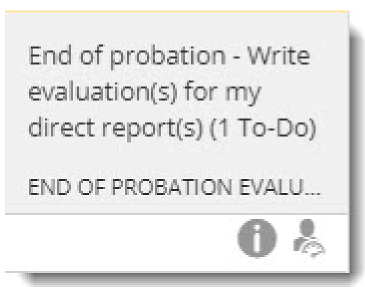


1. The supervisor writes the end of probation evaluation form.
2. The employee signs off the evaluation form.
3. The second-level supervisor signs off the form.

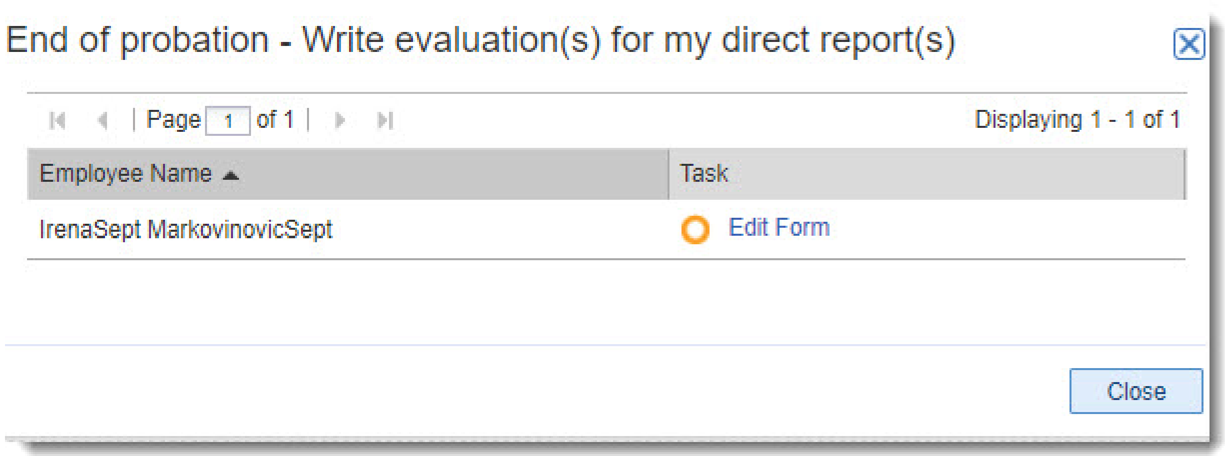
End of probation form

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

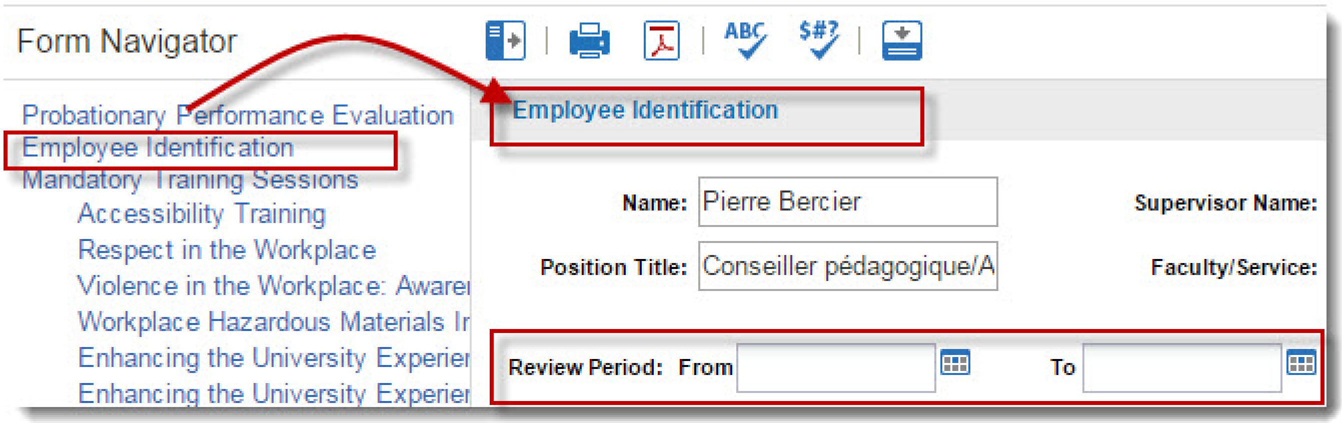
1. Click End of probation - Write evaluation (s) for my direct reports.



2. Click Edit Form.

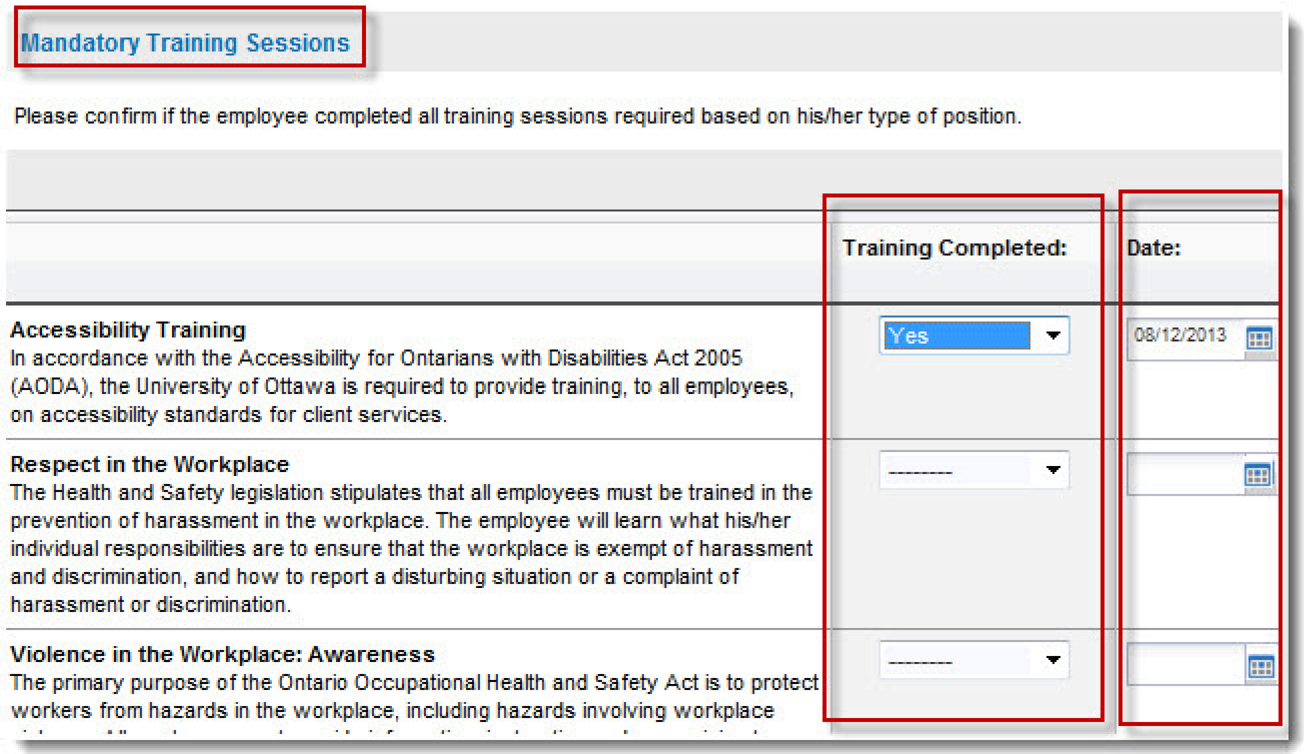


3. Click Employee Identification from the Form Navigator.



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.

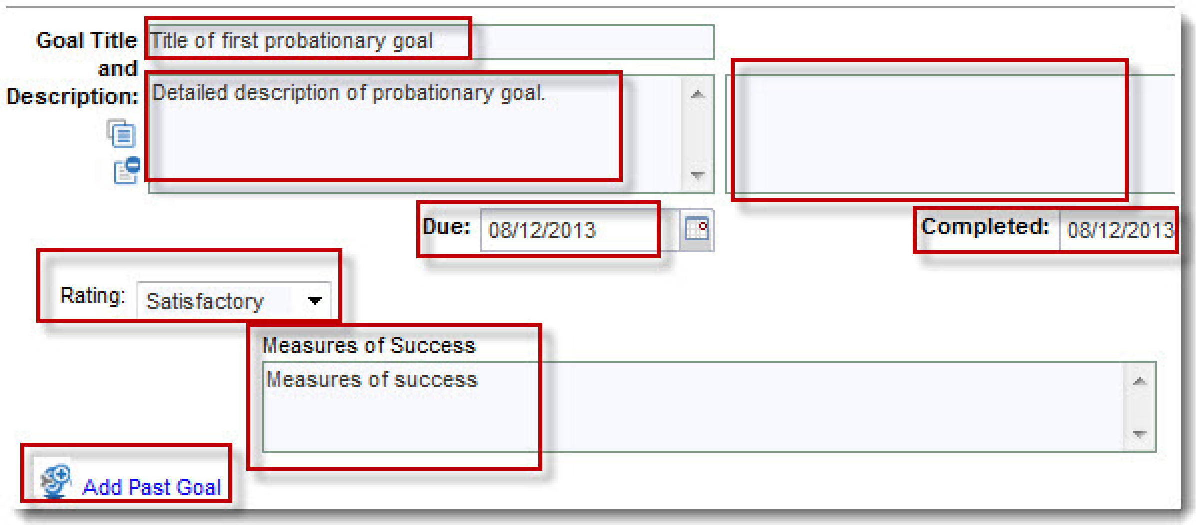
6. Click Mandatory Training Sessions from the Form Navigator.



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.



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.

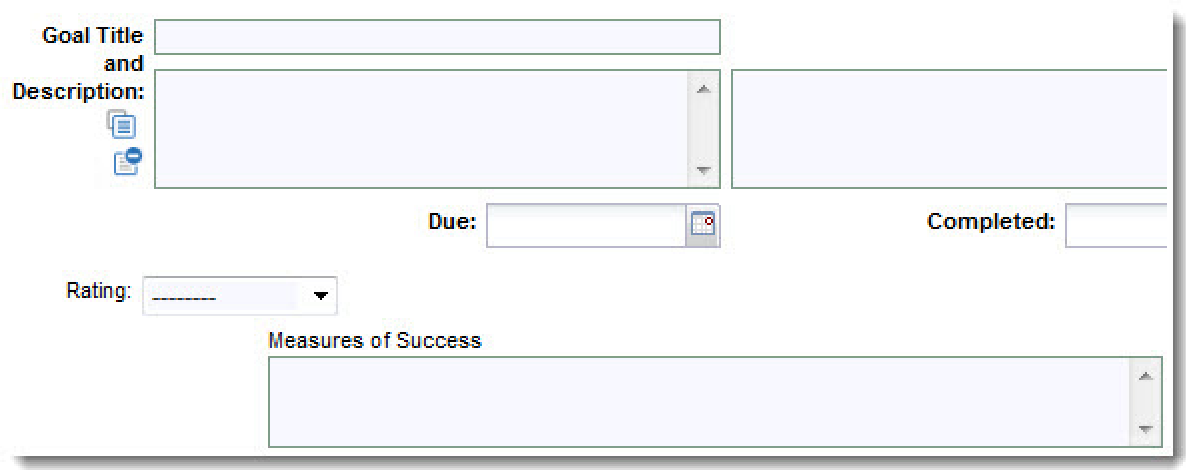
11. Click on the calendar icon of the Completed field and select the date when the goal was achieved.

12. Chose one of three possible Rating : Safisfactory, Unsatisfactory and Not Applicable

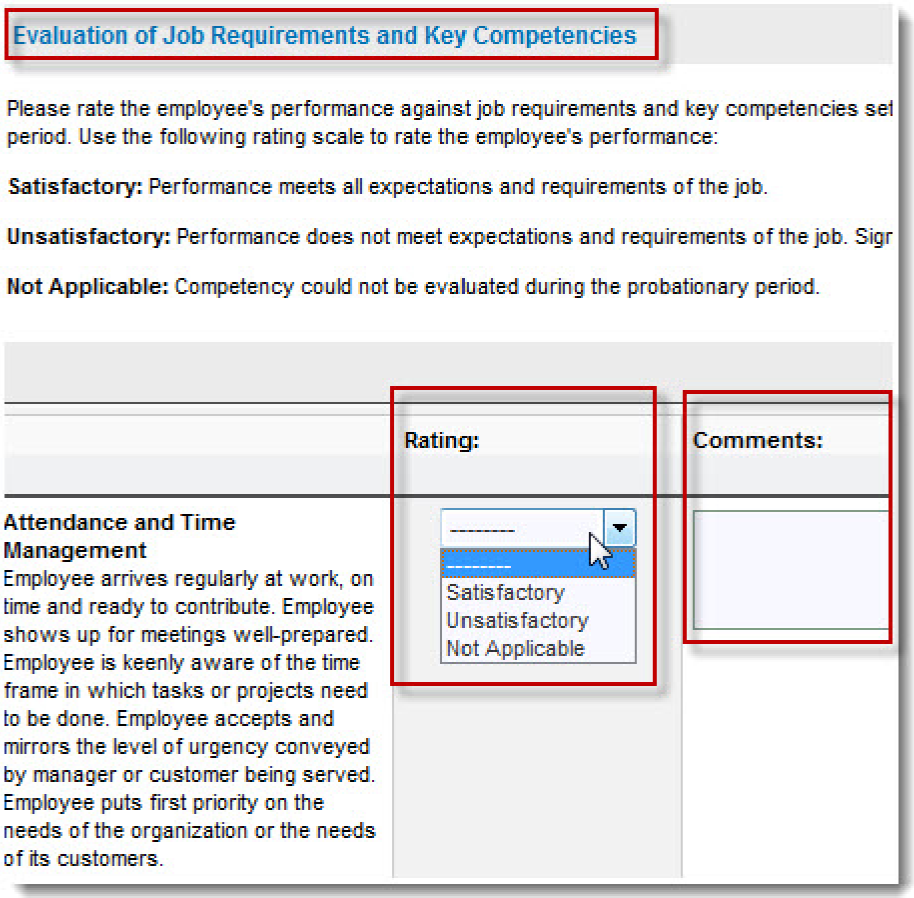
13. Repeat the last three steps for the next goals.

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.



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

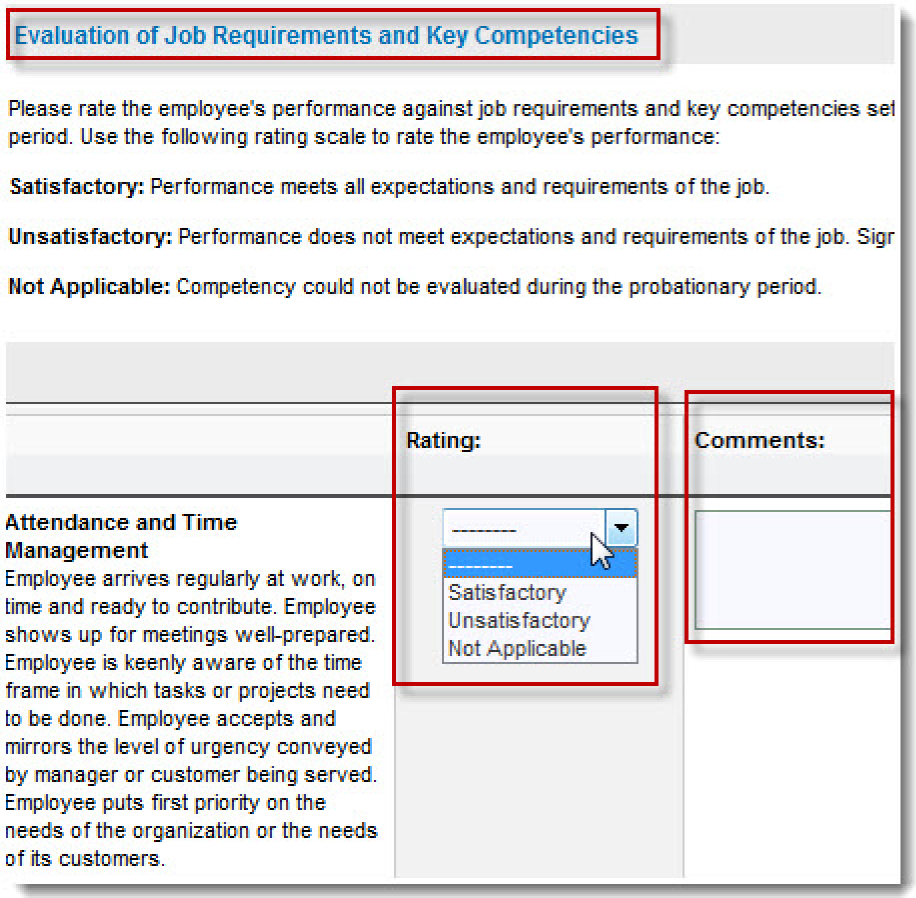


The system displays the job requirements and key competencies on which the employee must be evaluated at the end of the probationary period.

16. Bring the cursor on the first job requirement / competency that is displayed on the form.

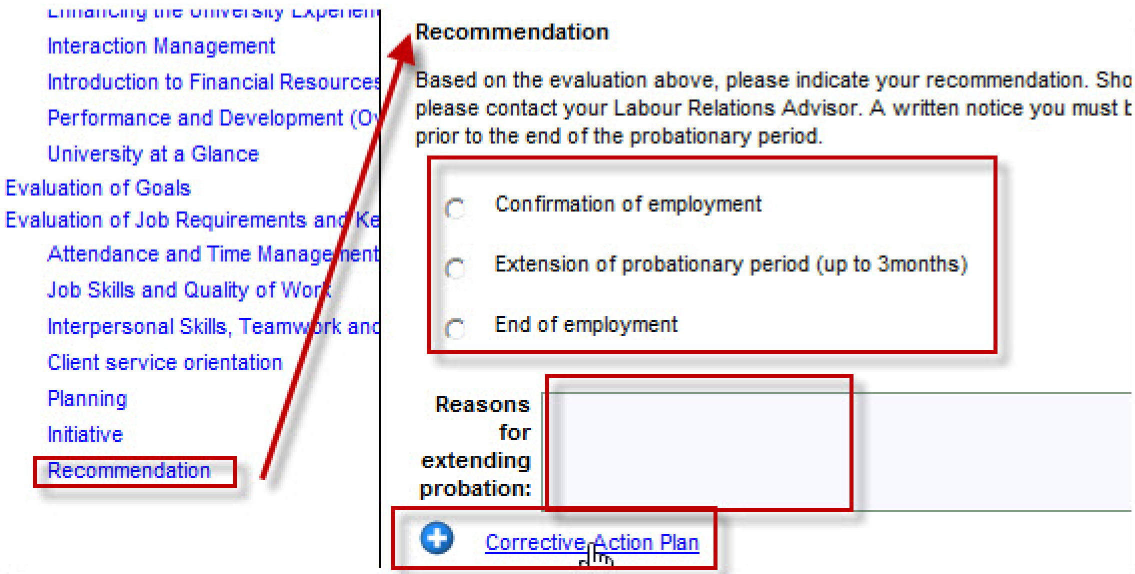
17. Select the level using the Rating drop-down list for the job requirement or competency .

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



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



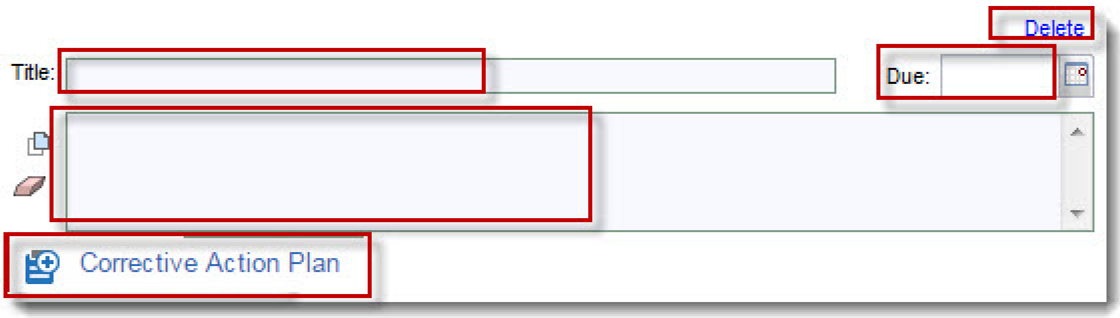
22. (Optional) Type a comment in the box Reason for extending the probation if you have selected to extend the probation at the previous step.

23. (Optional) Click on the Corrective Action Plan if you have decided to extend the probationary period.

    a. Type the Title of the measure to adopt to correct the problem.

    b. Click on the calendar icon of the Due date and select the date when the corrective measure must have begun.

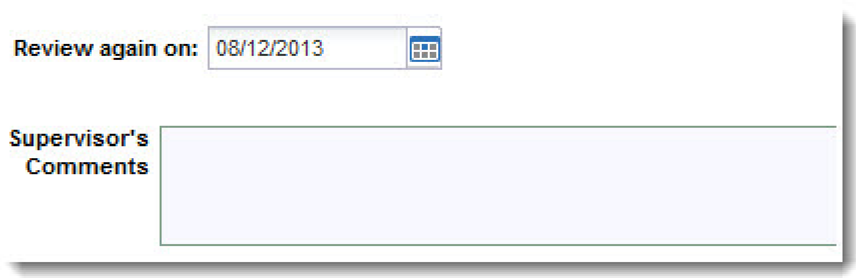
    c. Type a detailed description of the corrective measure to adopt to correct the problem in the box under the title.



24. (Optionall) Click Corrective Action Plan if you need to add more than one.

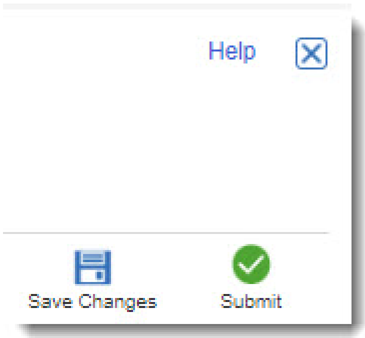
25. (Optional) Click Delete to remove a corrective action plan.

26. (Optional) Click on the calendar icon Review again on and select the date if you have decided to extend de probationary period.

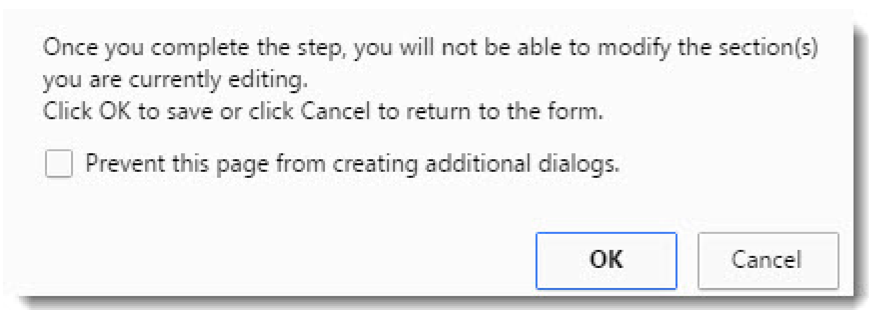


27. (Optional) Type a comment in the Supervisor's Comments .

28. Click on Save Draft.

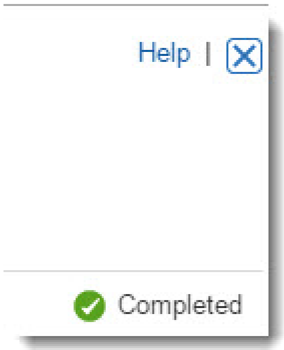


29. Click OK.
30. Click Submit.
    If you click on Submit the form is saved and the process is completed. The form cannot be modified once it has been submitted.
31. Click OK.
32. Click Ok.



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

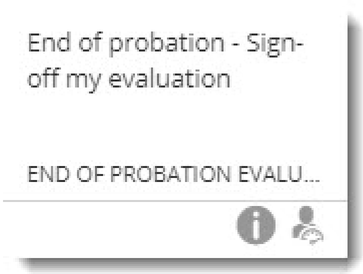
33. Click on the X to close the form.



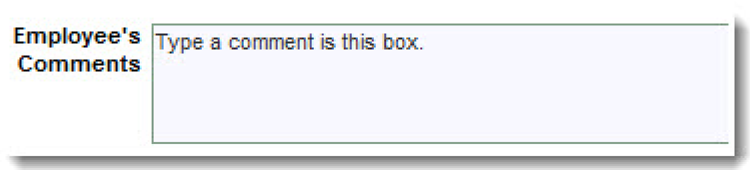
Signature of the End of Probation Evaluation Form

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.

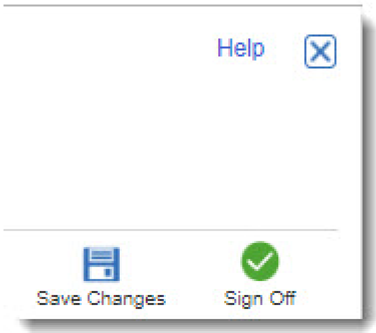
1. Click End of probation - Sign-off my evaluation.



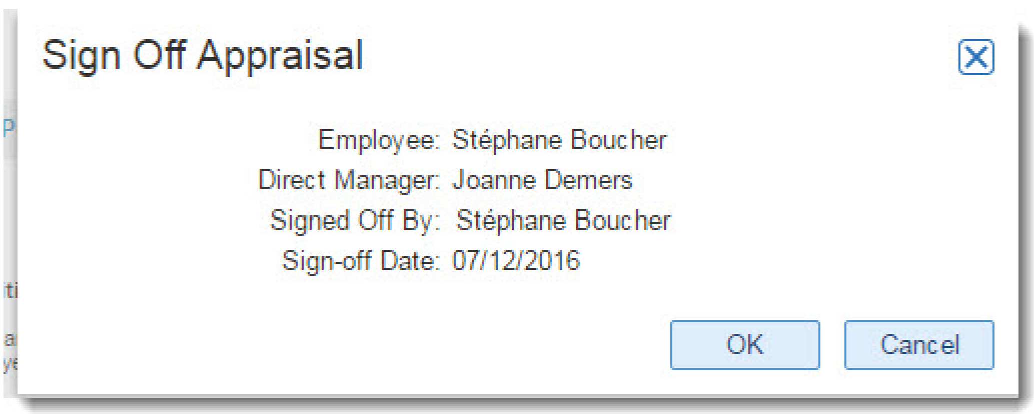
2. (Optional) Type a comment in Employee's Comments.



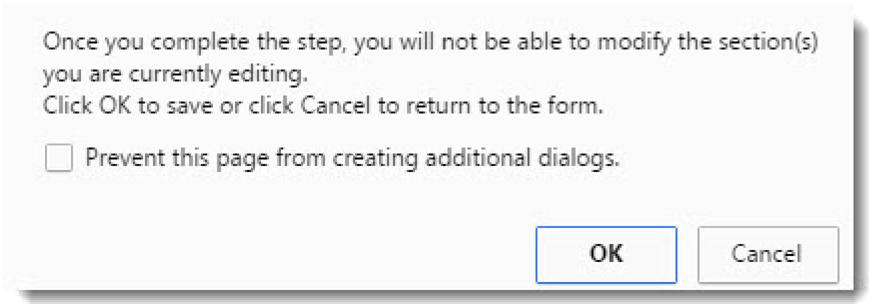
3. Click Save Changes.



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.

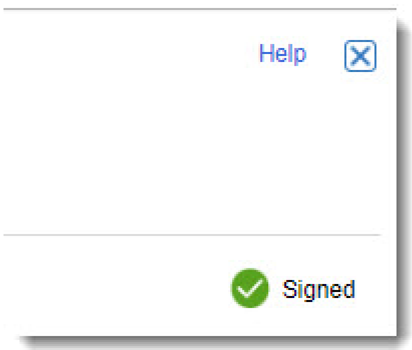


7. Click OK.



The system will the task with a signed status.

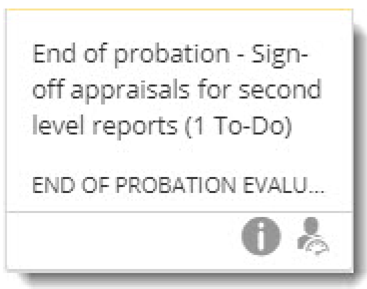
8. Click on the X to close the form.



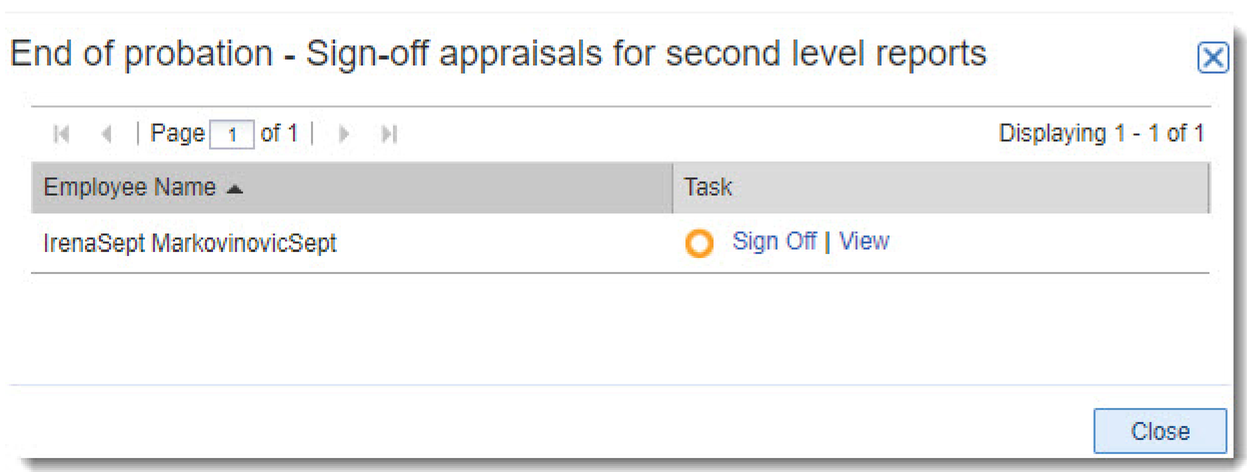
Second Level Supervisor Approval

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.



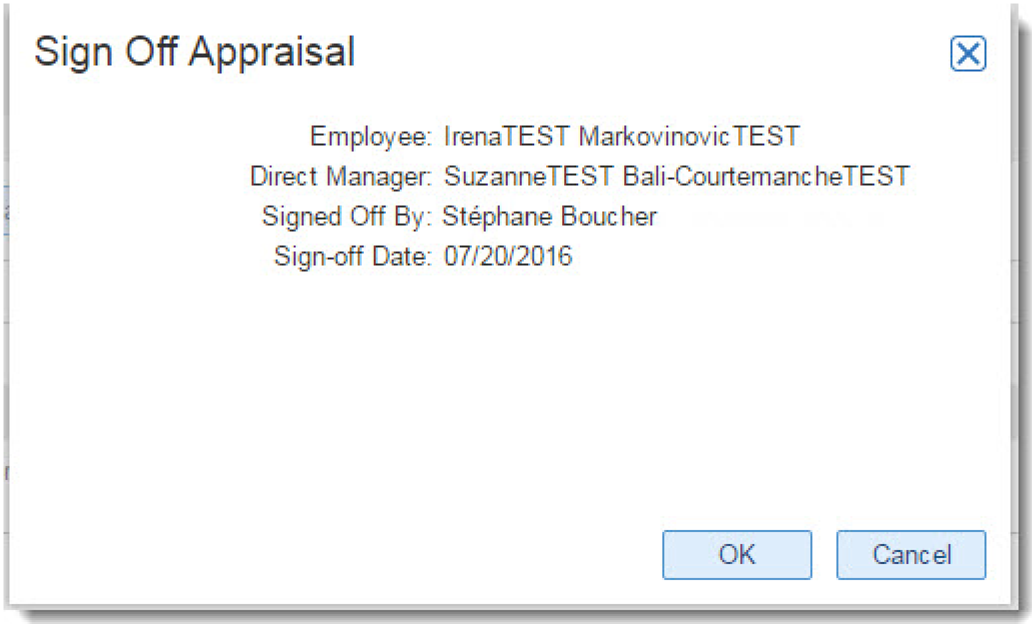
2. Click View.



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

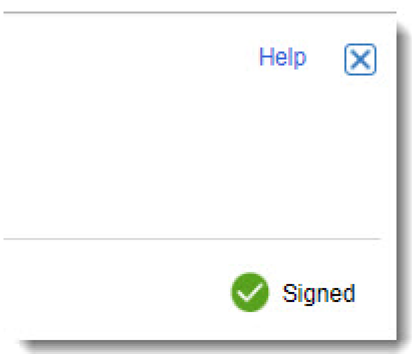
3. Click Sign Off.

4. Click OK.



The system will display the task as a signed status.

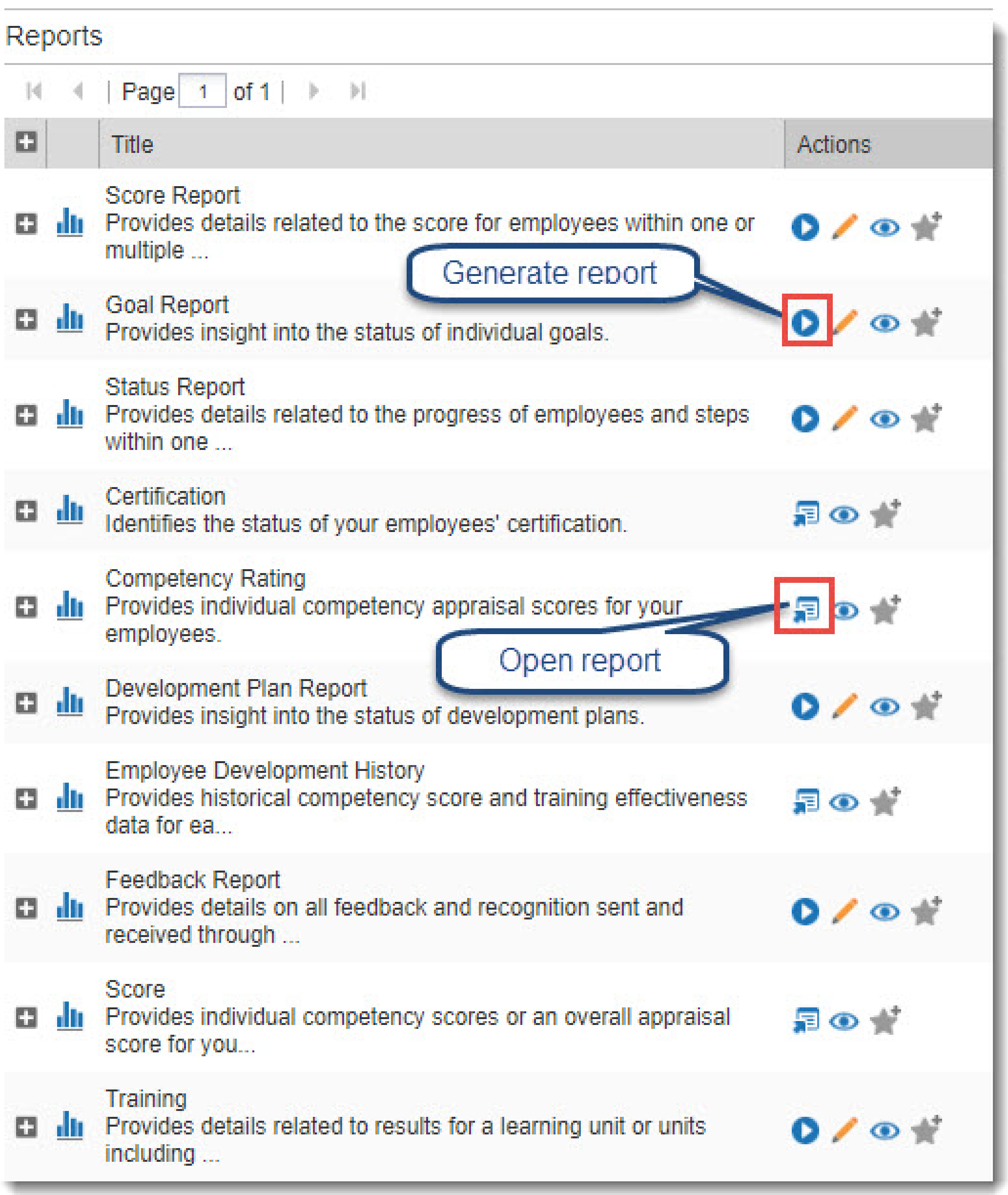
5. Click X to close the form.



Halogen Reports

About reports

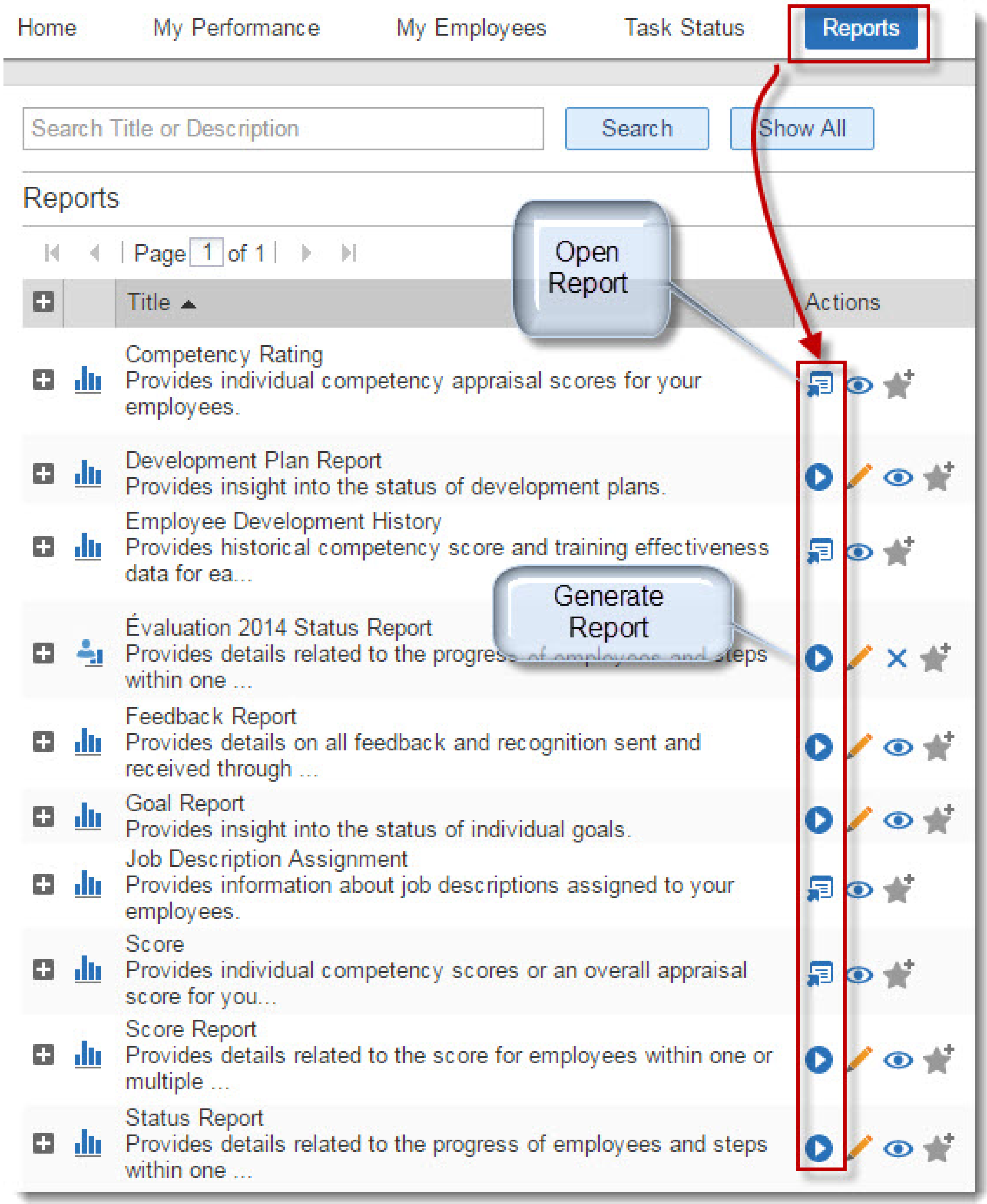
Halogen can generate a variety of reports. The employee's user type determines which reports they can generate.



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

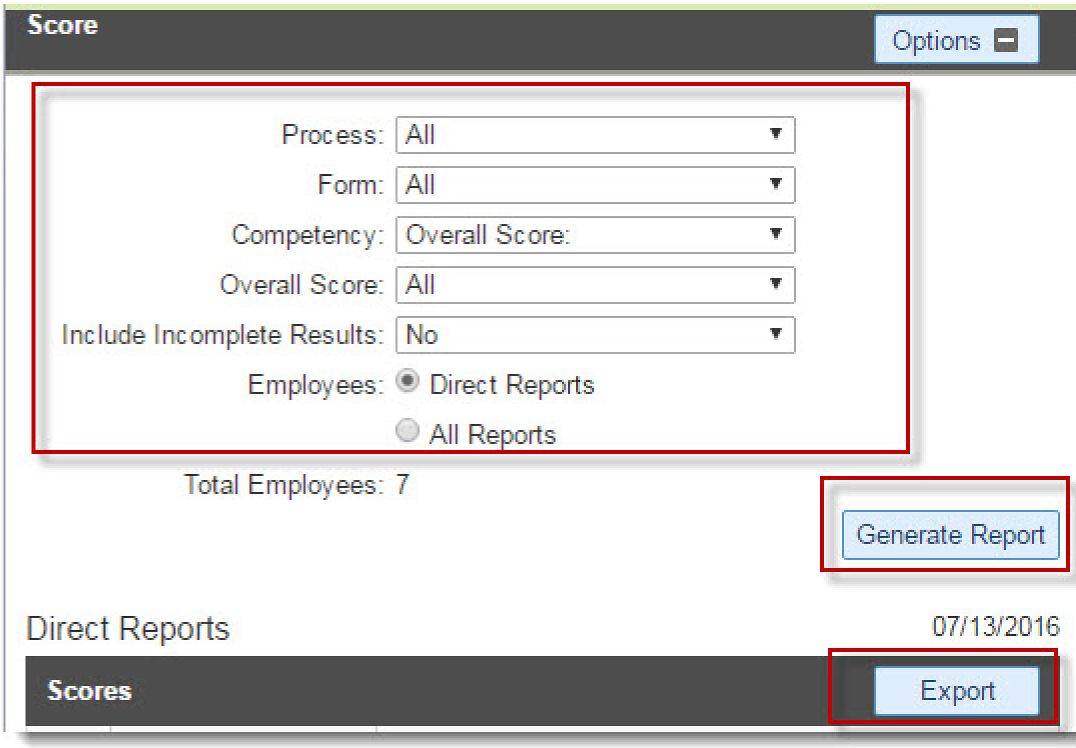
Score

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



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

3. Results can be filtered to meet reporting needs.



- 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.

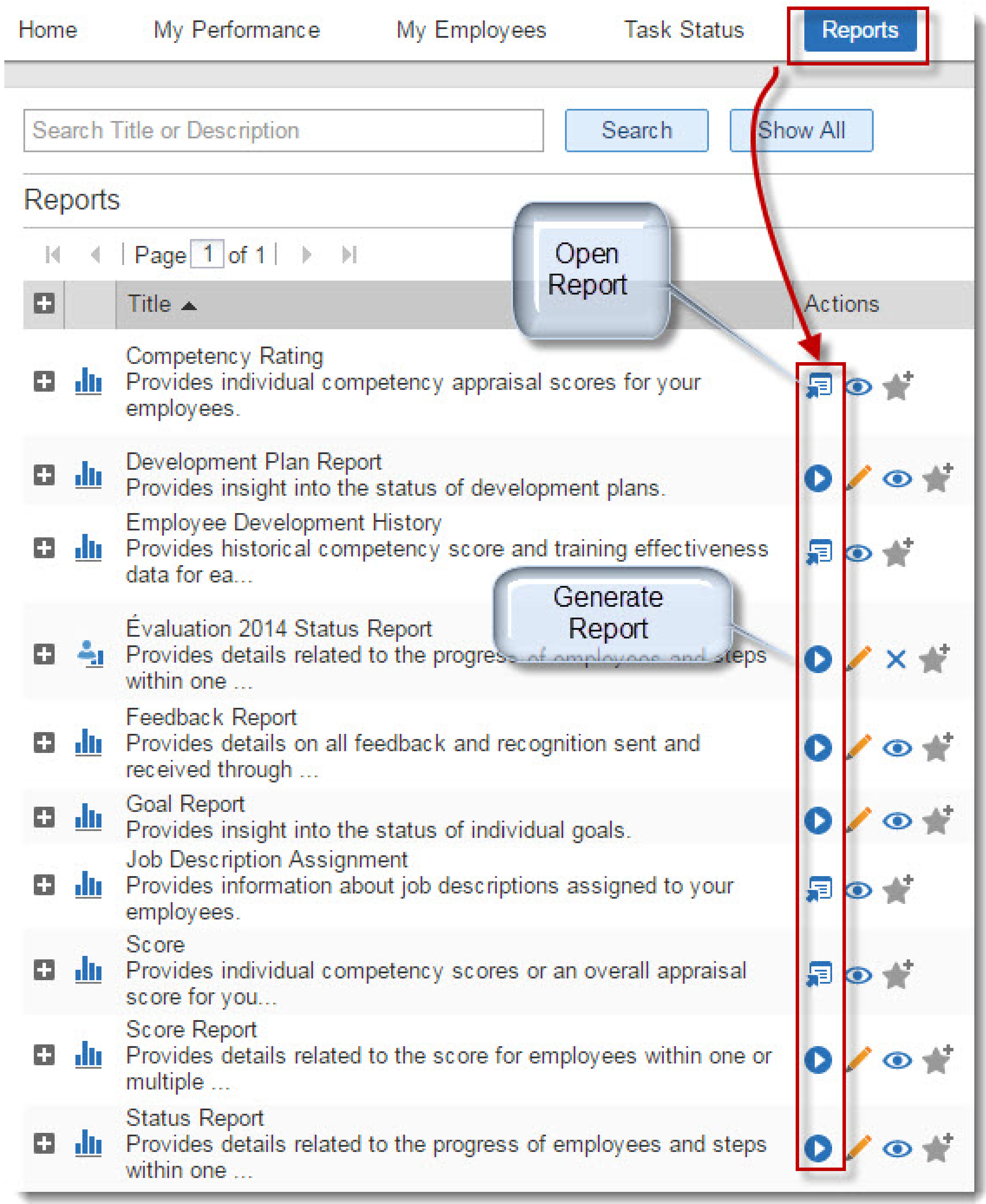
6. The report opens in Excel.

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
	Average		**3.4**	

Score Report

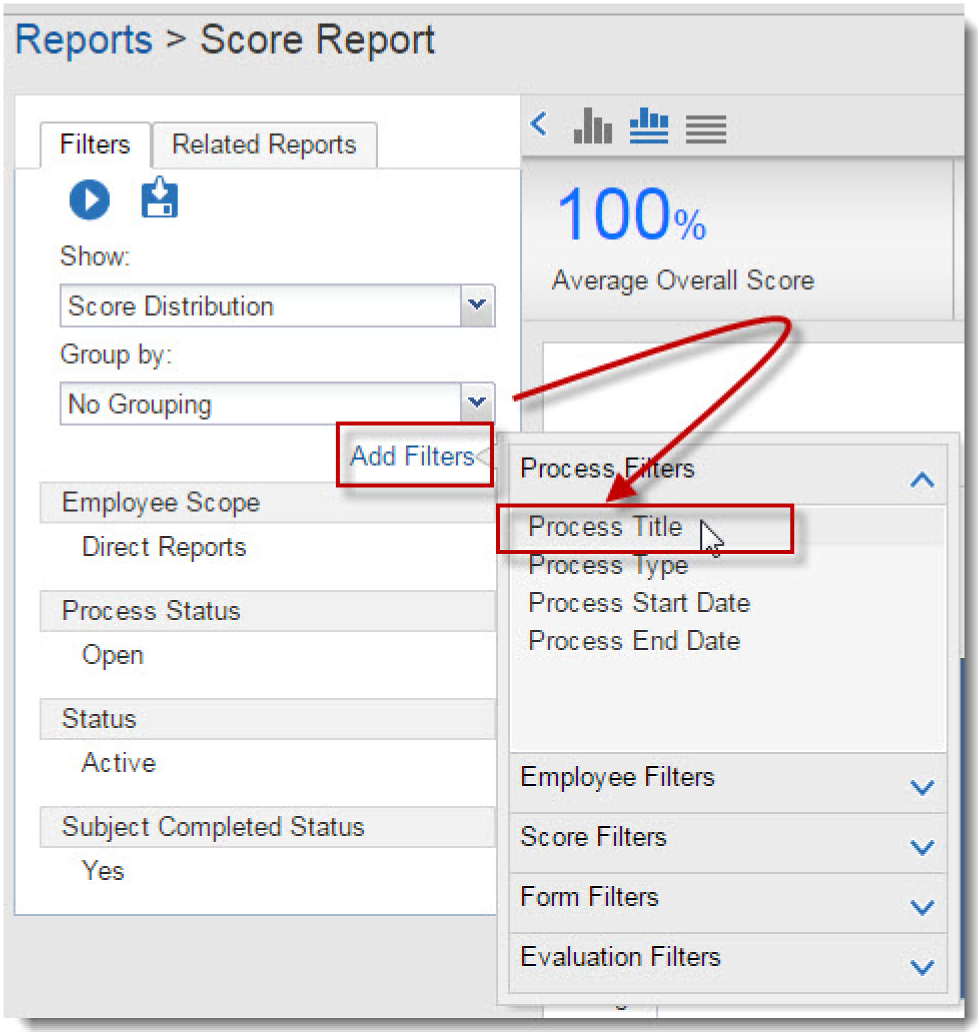
Provides details related to the score for employees within one or multiple Performance processes.

1. Click Reports.

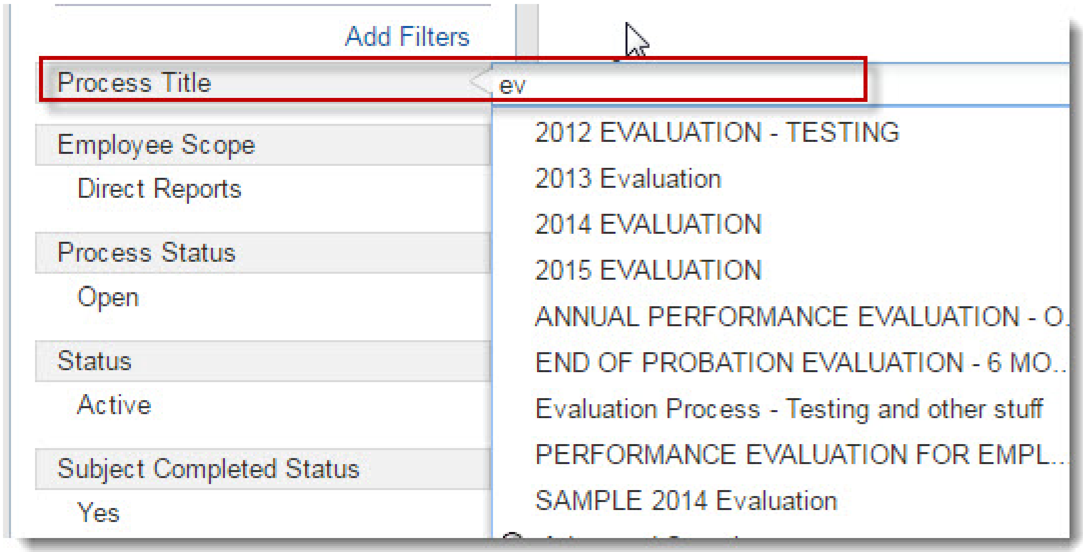


2. Click Generate report in the Actions column of the Score Report. The report is displayed in a new window.

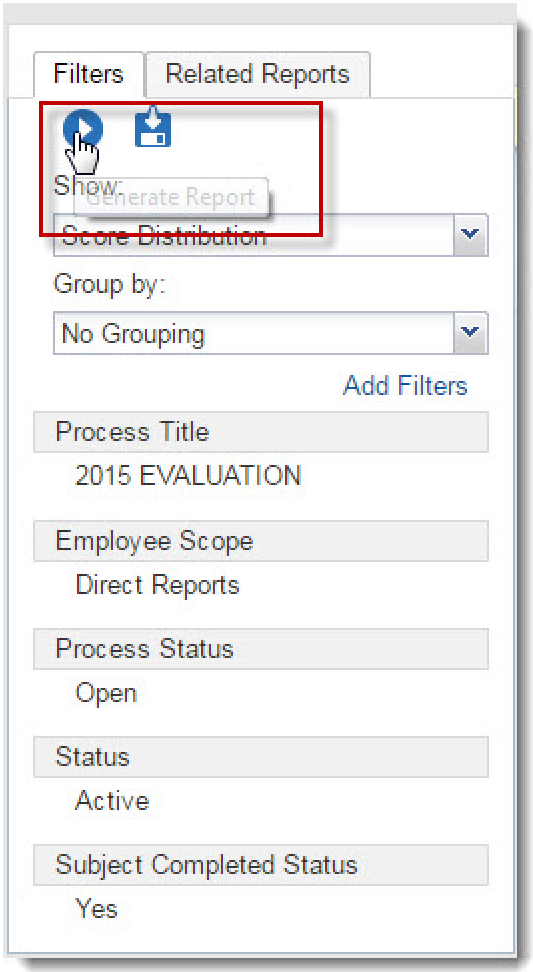
3. Click Add filters and click on Process Title.



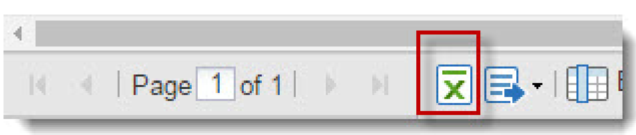
4. Type the first few letters of the process and click on the process name in the drop-down list.



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



6. Click on the Export to Microsoft Excel icon.



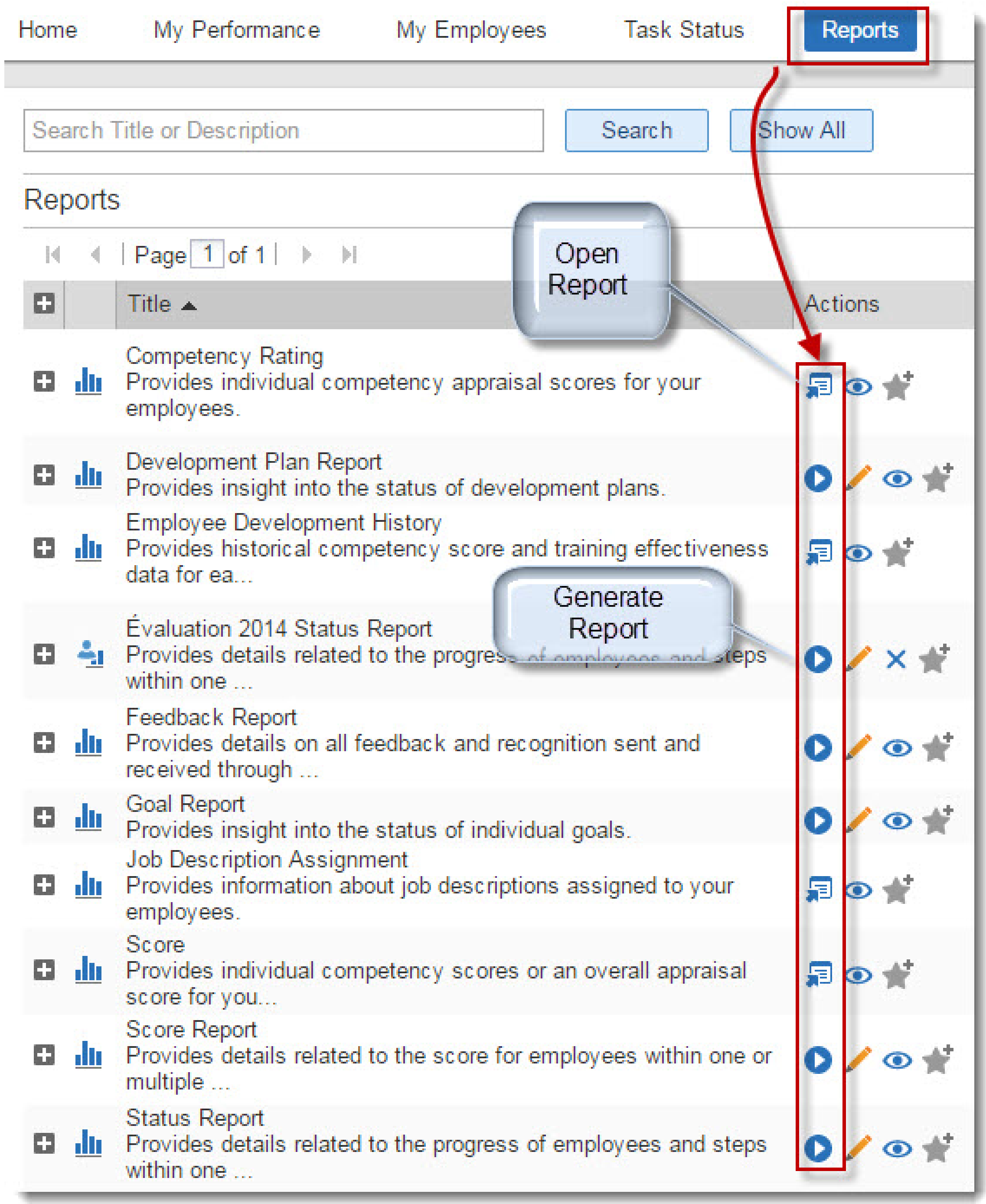
7. The report opens in Excel.

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

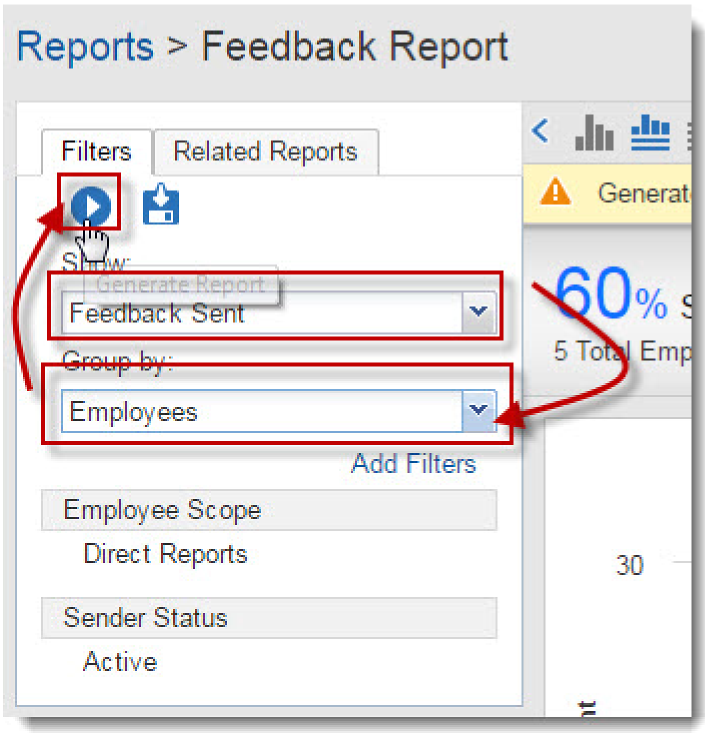
This report provides details on all feedback and recognition sent and received through the year.

1. Click Reports.



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

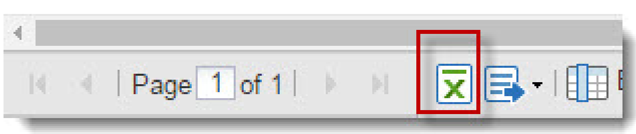
3. Select Feeback Sent.



4. Select Employees.

5. Click Generate Report.

6. Click sur the Export to Excel icon.



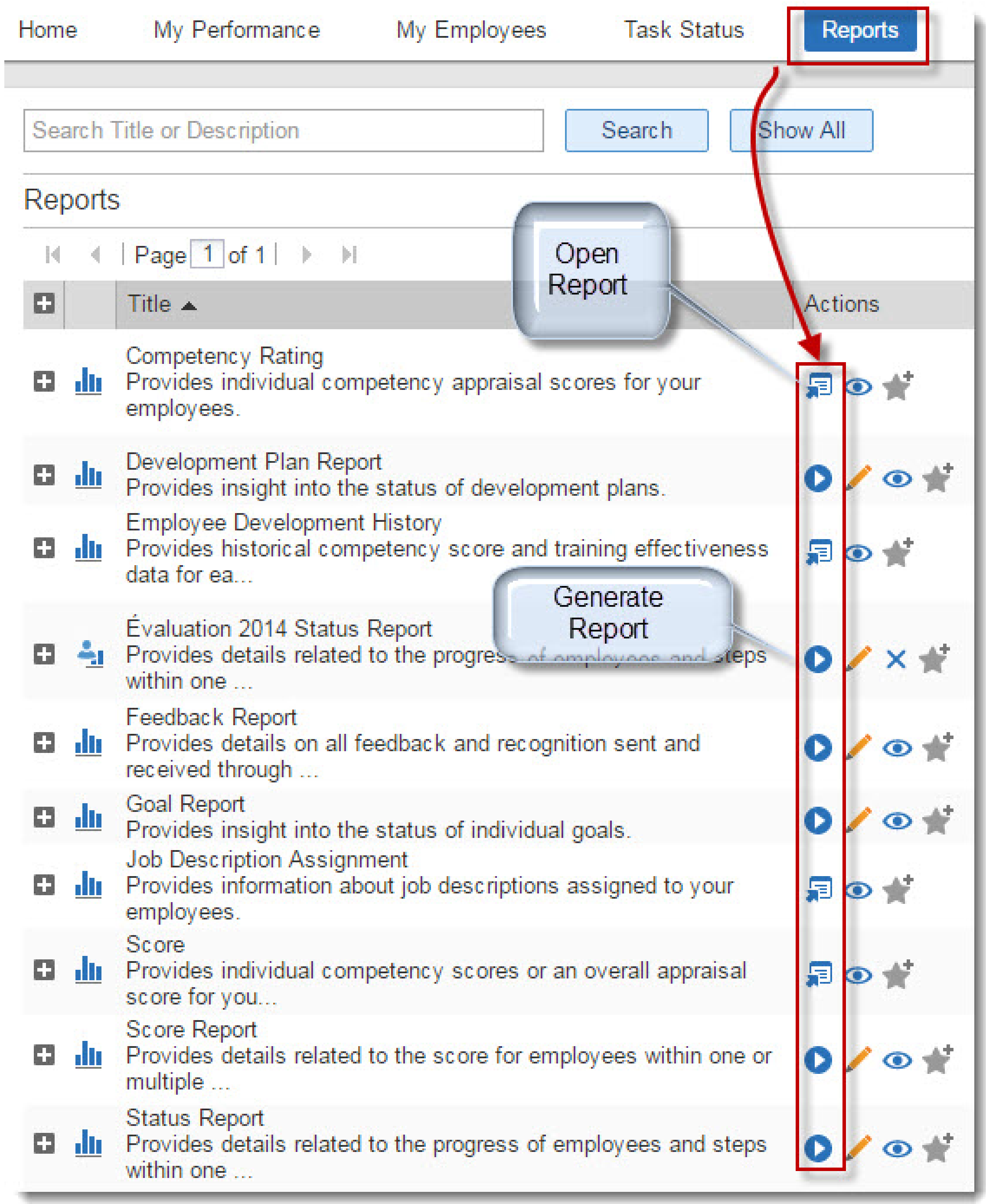
7. The report opens in Excel.

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

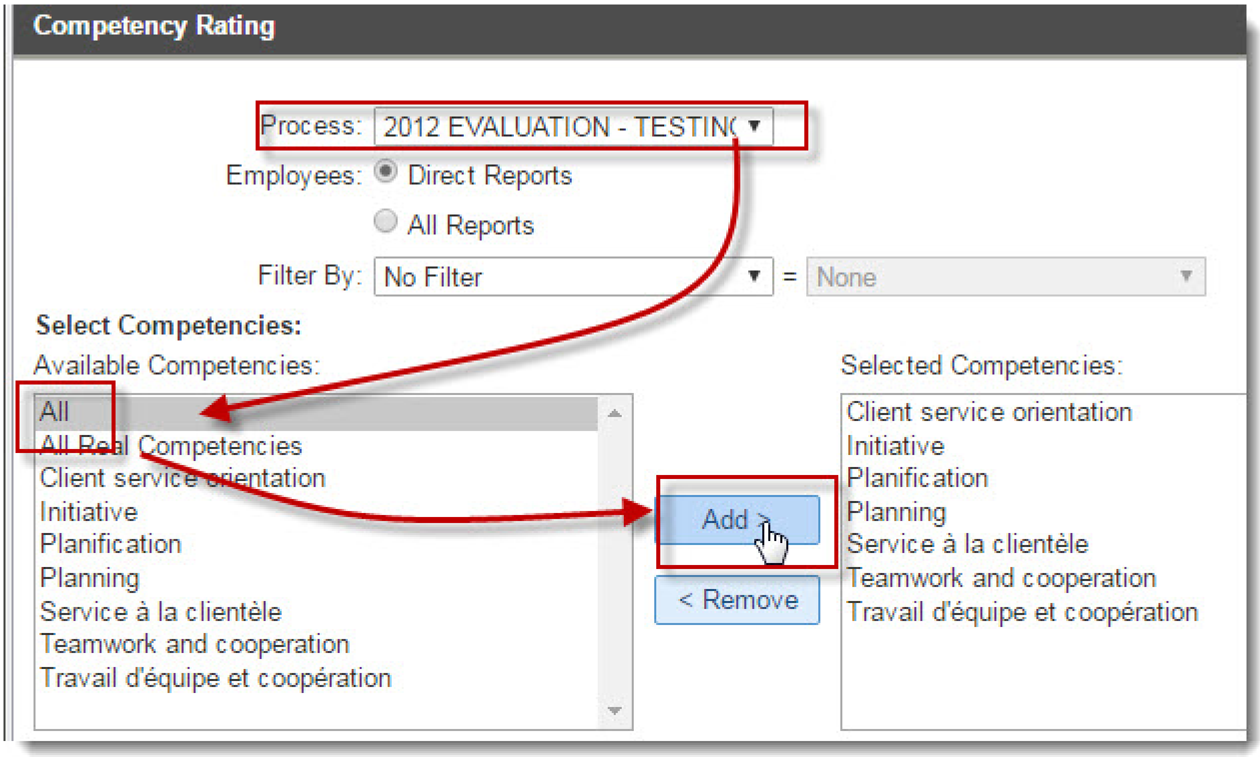
Provides individual competency appraisal scores for your employees.

1. Click on Reports.



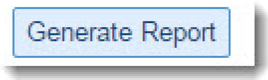
2. Click on the Open Report icon of the Competency Rating report.
   The Competency Rating report is displayed in a new window.

3. Results can be filtered to meet reporting needs.

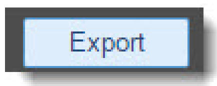


- Employees: to view direct results for only those employees who report directly to you, select Direct Reports: to view results for all employees you are responsible for, select All Reports.
- Filter by: select the desired parameters (Position Title, Position Number, Faculty or Service, etc.). Click 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.



5. Click on Export.



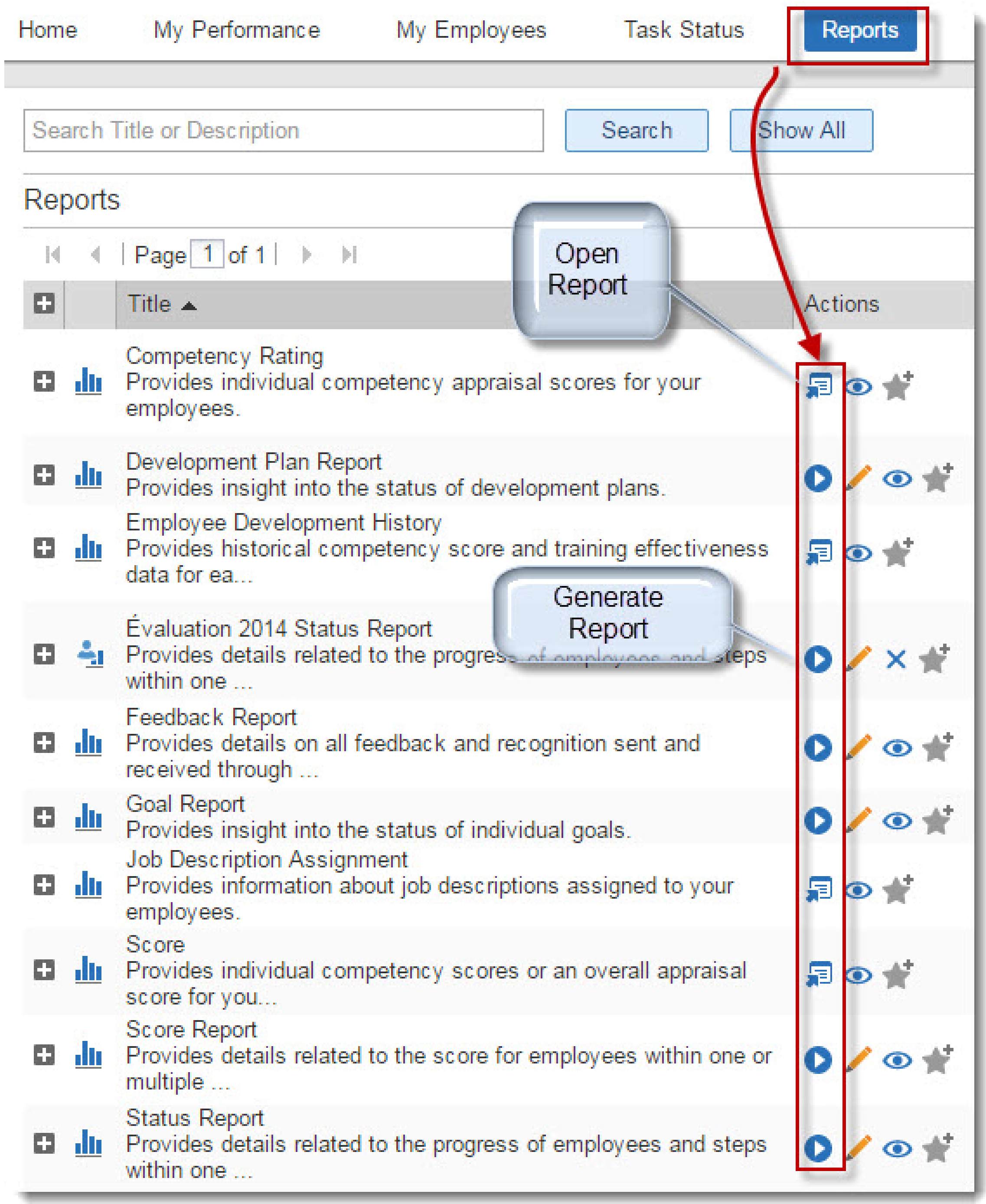
6. Click OK.
7. The report opens in Excel.

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%	-

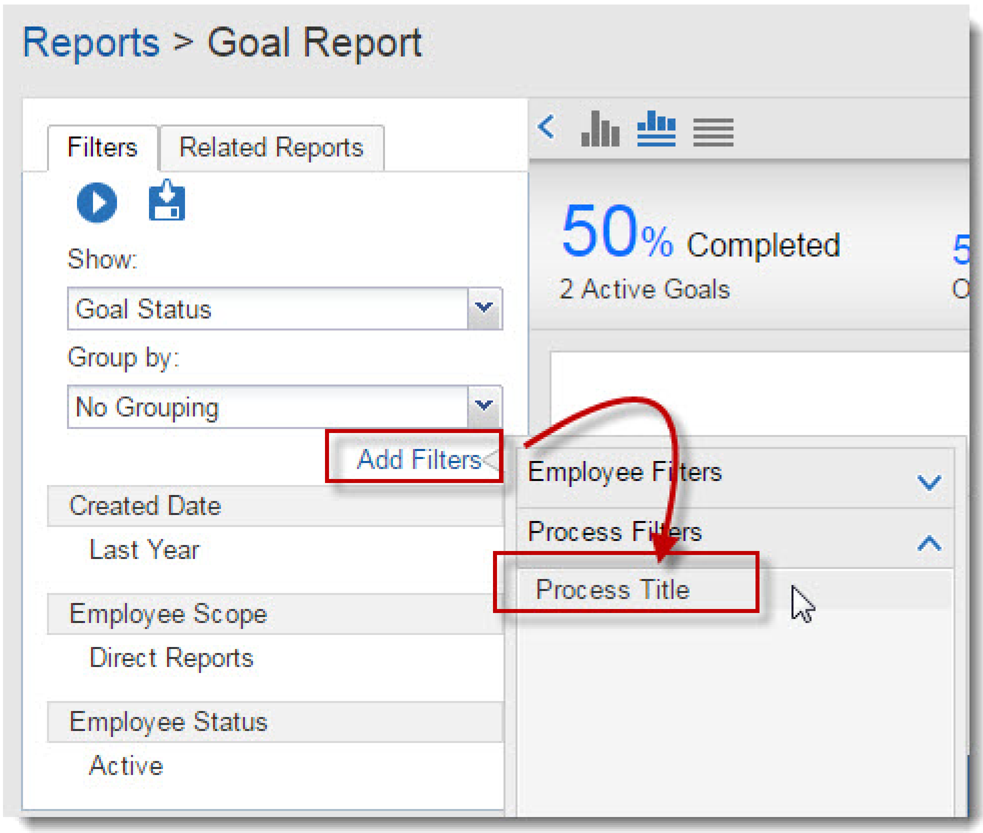
Generating a goals report

Provides insight into the status of individual goals.

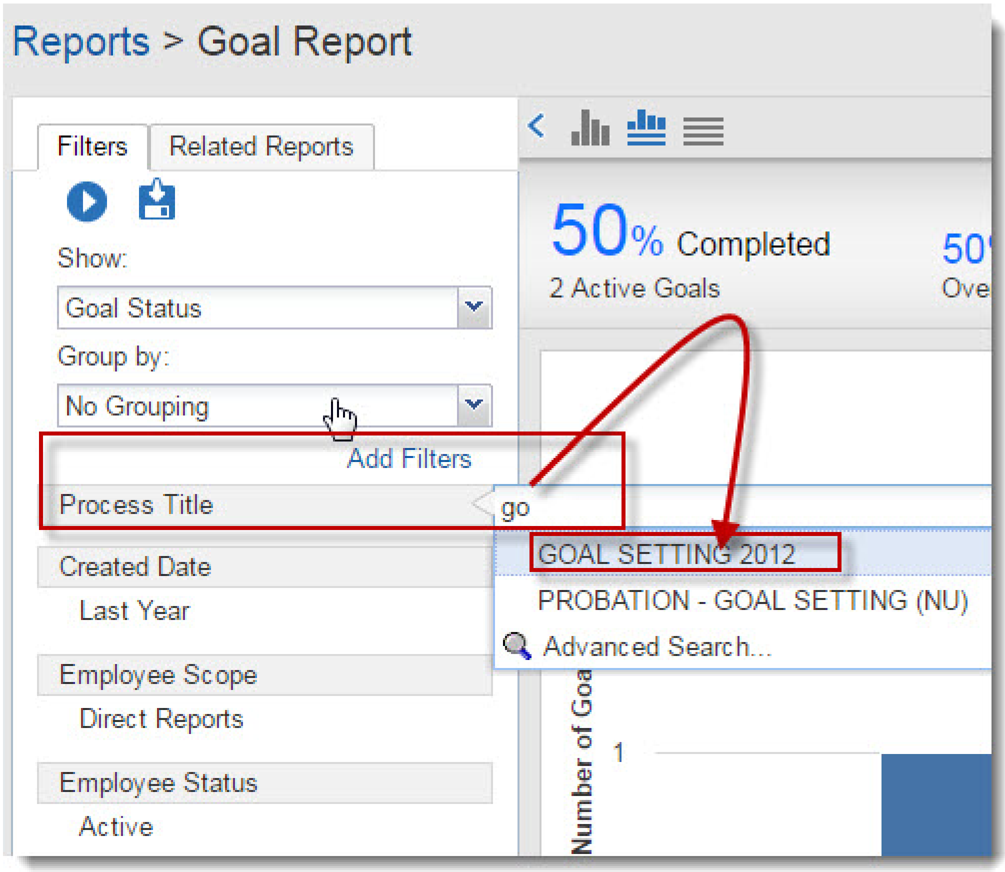
1. Click Reports.



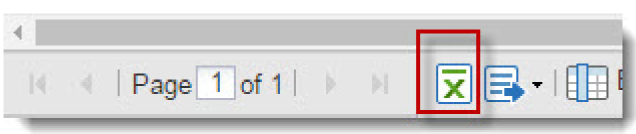
2. Click Generate Report of the Goals report.
   The Goals report is displayed in a new window.
3. Click Add filters and click on Process Title.



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 Open.

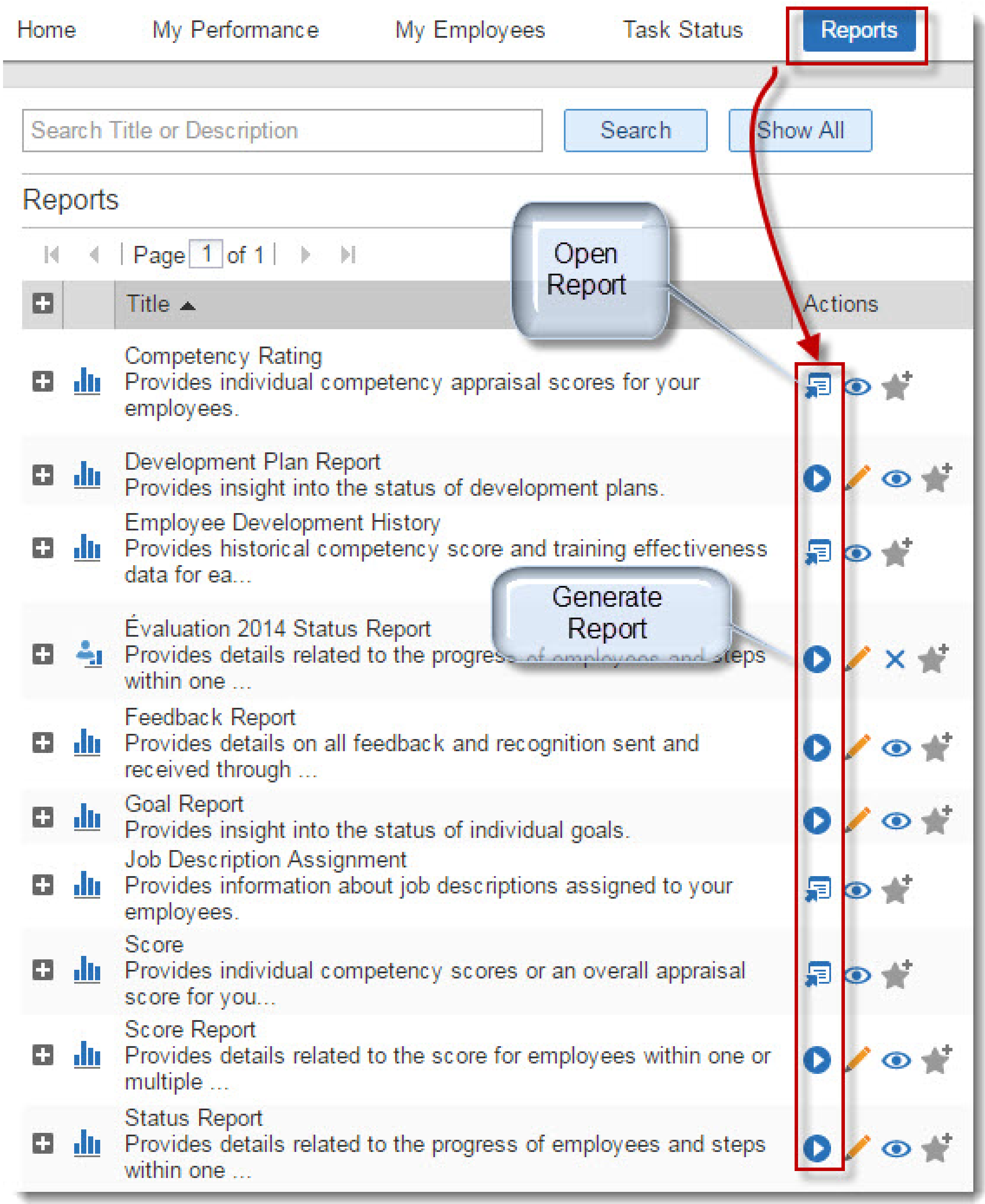
7. The report will be produced as an Excel document.

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

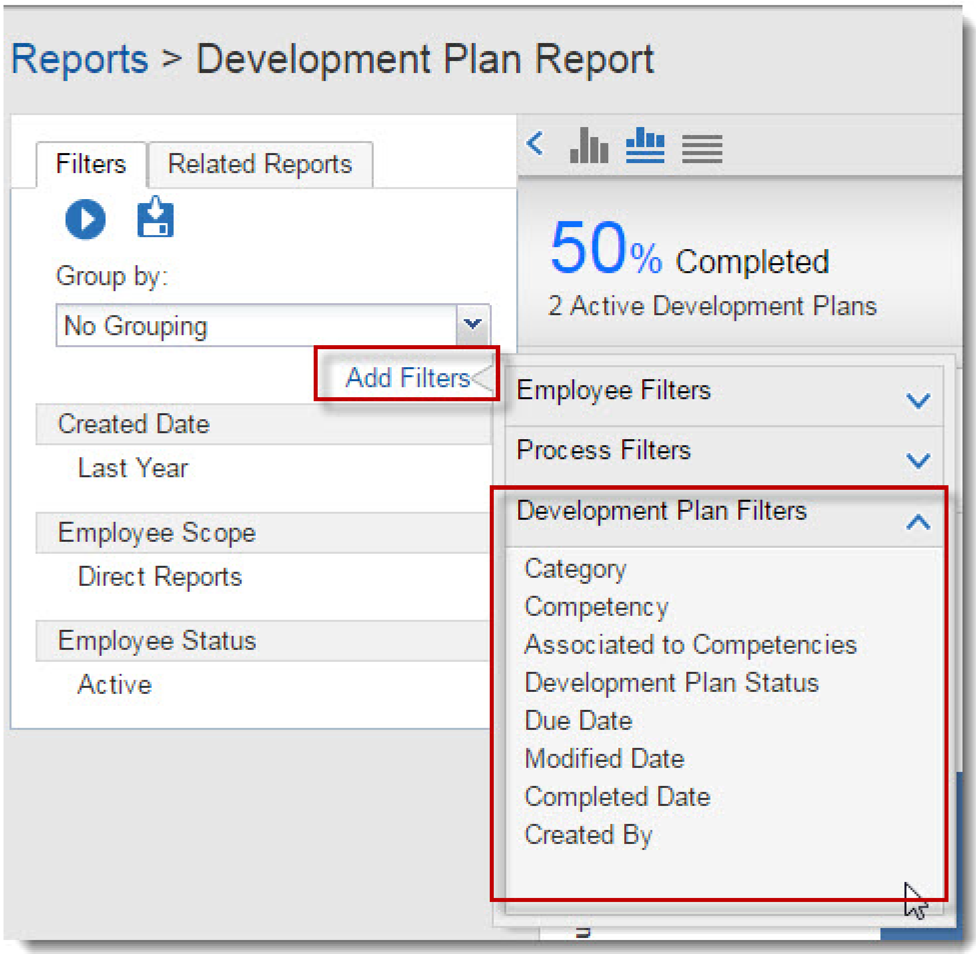
A development plan report shows a list of development plans for the supervisor's employees. The report shows the different elements of the plan (title, category, status, etc.).

1. Click Reports.



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 on the Export to Excel icon .

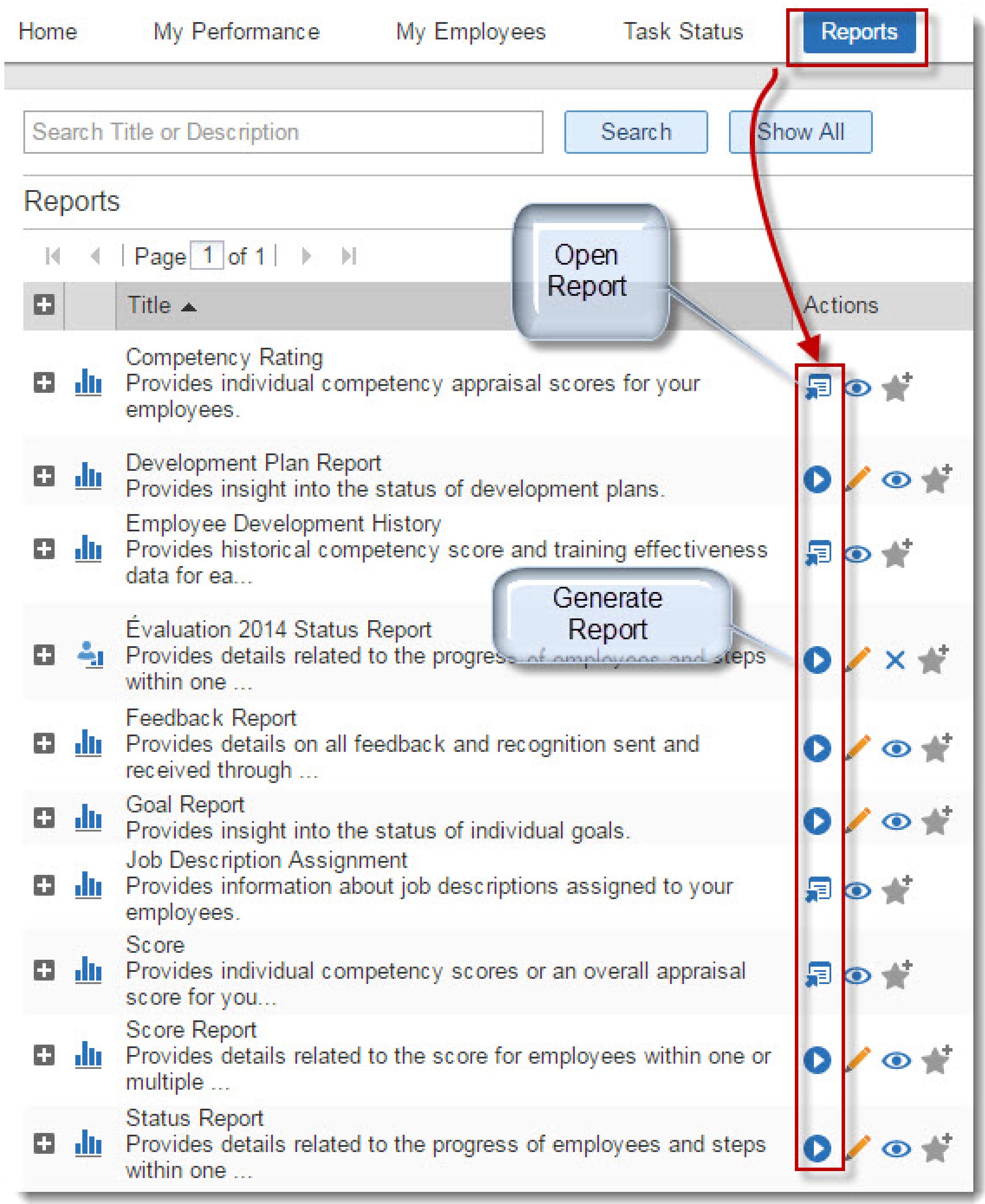
5. Click Open .
6. The report will be produced as an Excel document.

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

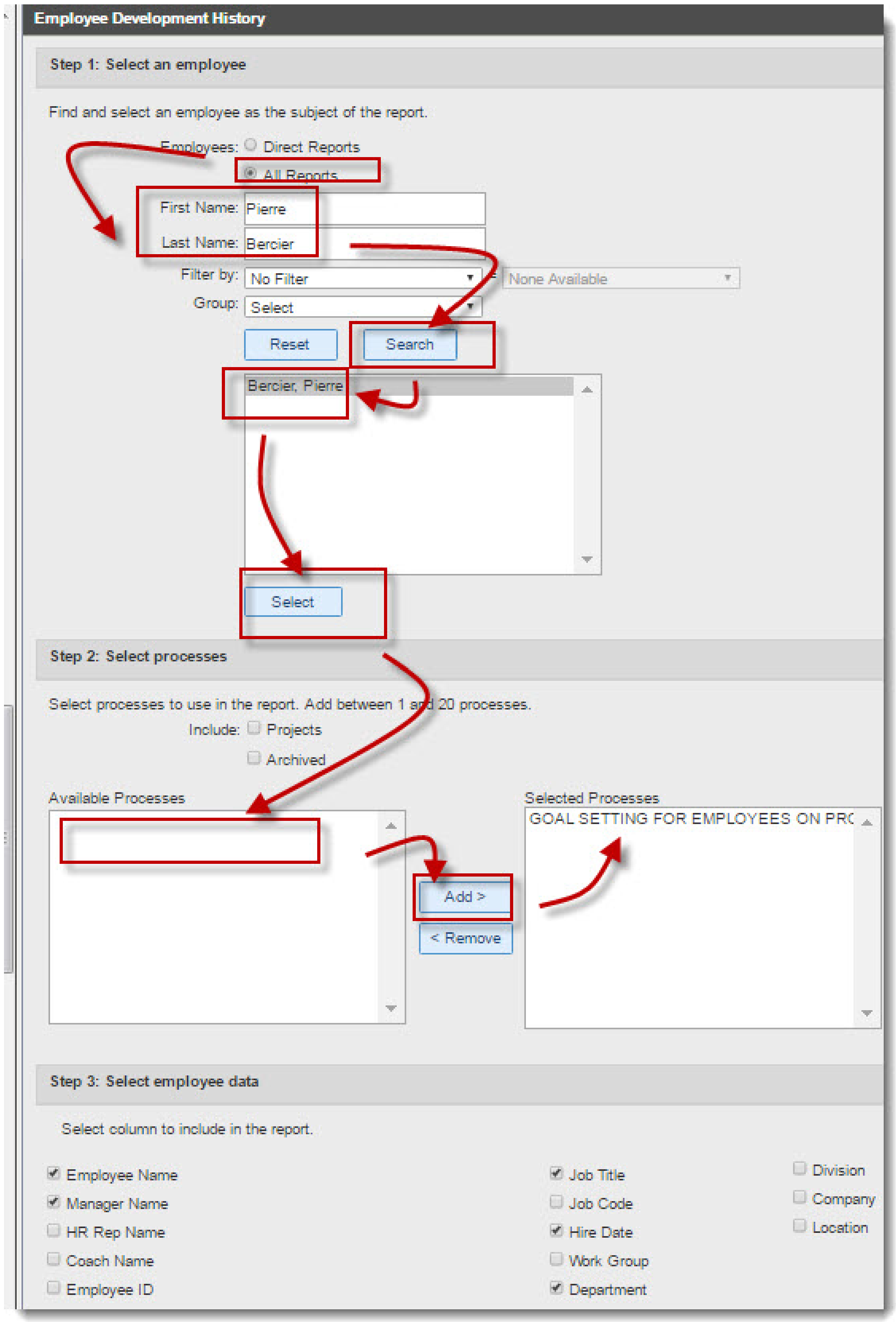
This report shows employees competency scores over time. If a learning activity or any professional development is associated with a competency, the supervisor can use the report to assess the effectiveness of the activity.

1. Click Reports.



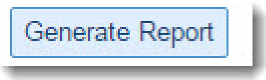
2. Click Employee Development History report.
   The Employee Development History report is displayed in a new window.

3. Results can be filtered to meet reporting needs:

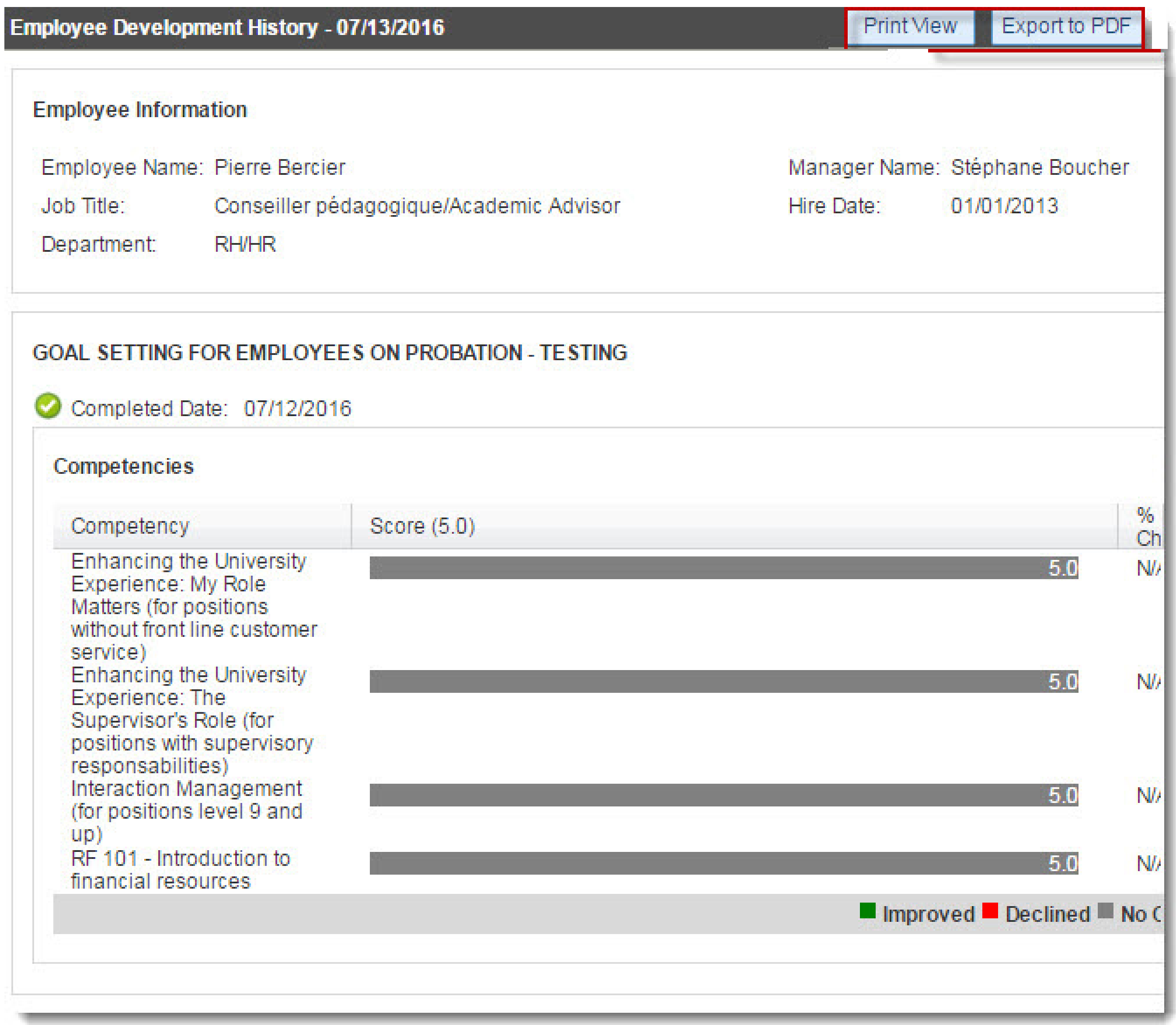


- Enter the employee's first and last names where indicated.

4. Click Generate Report.



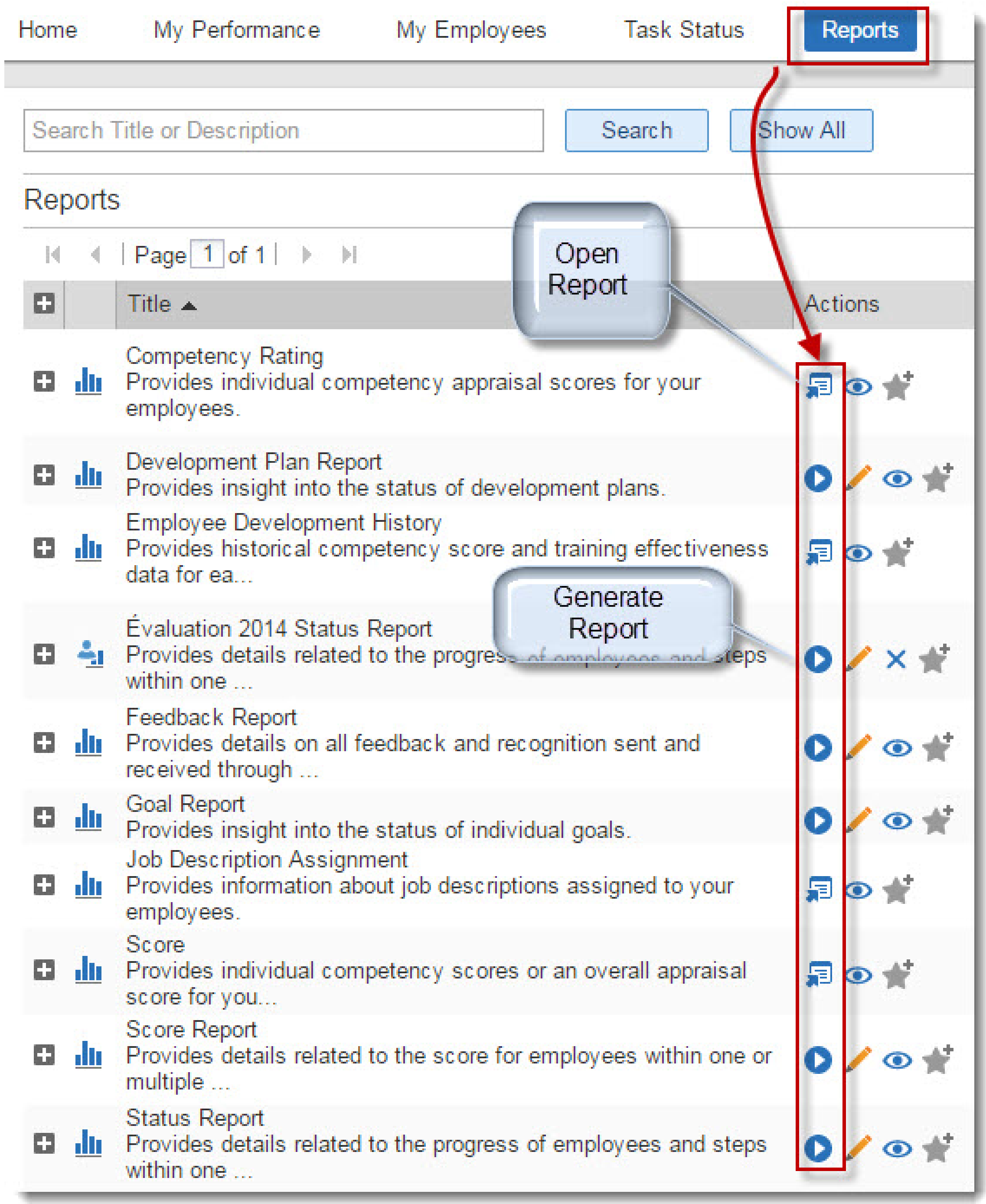
5. Click Print Preview or Export to PDF.



Generating the Status Report

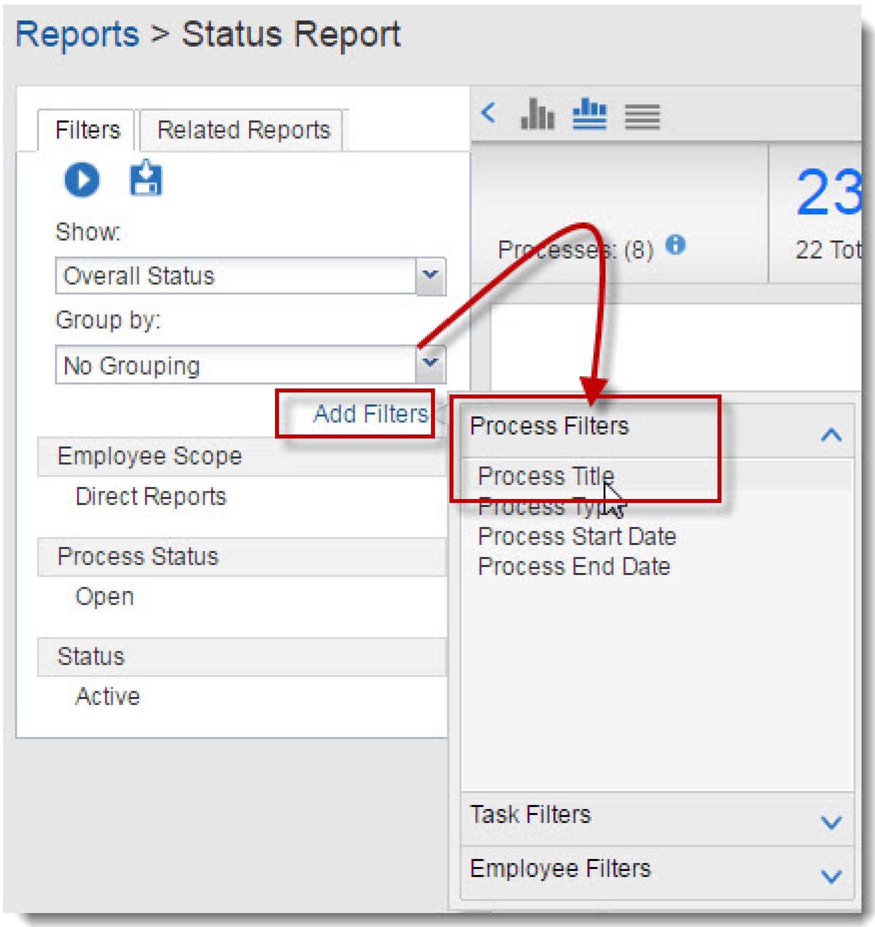
This report provides details related to the progress of employees and steps within one process.

1. Click Reports.

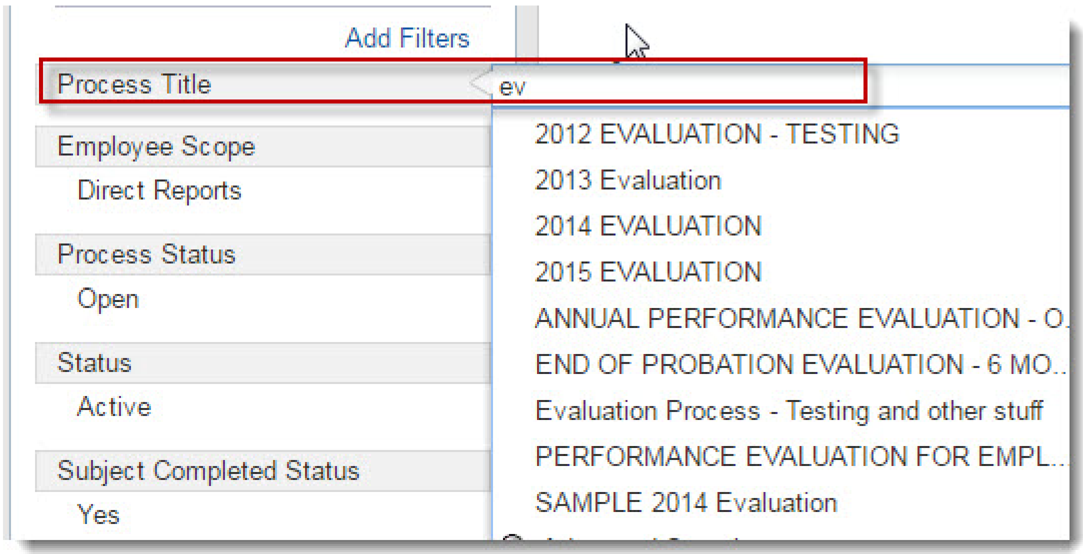


2. Click Generate report in the Actions column of the Status Report.
   The report is displayed in a new window.

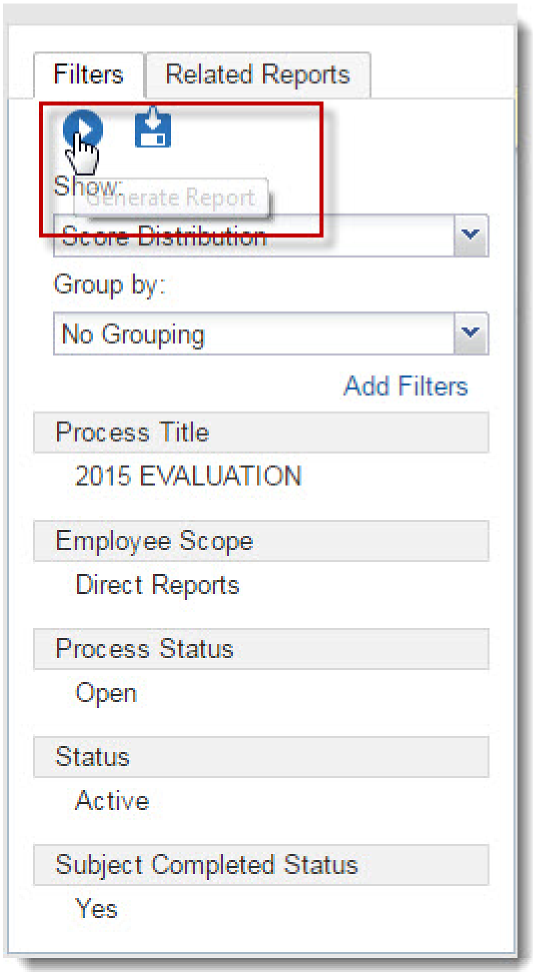
3. Click Add filters and click on Process Title.



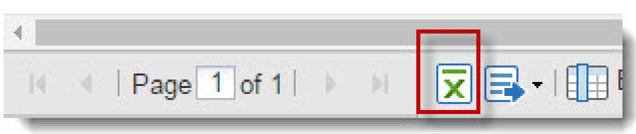
4. Type the first few letters of the process and click on the process name in the drop-down list.



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.

Do you want to open or save **Score_Report_export.xls** (5.50 KB) from **tms.na1.hgncloud.com**? 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

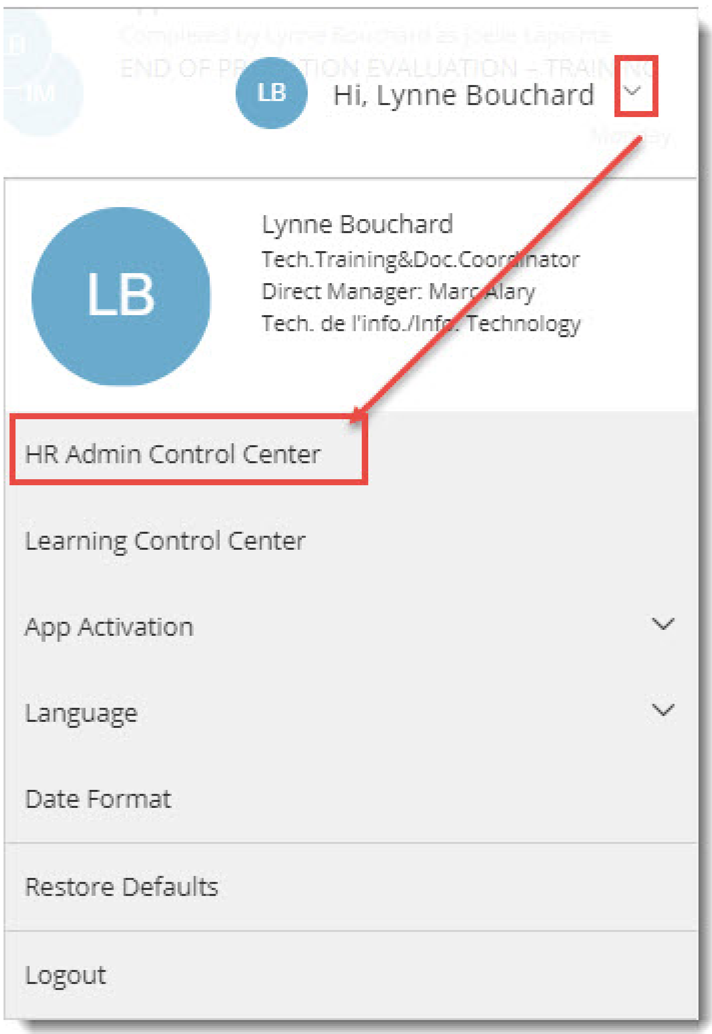
The next sections of the present guide describe in detail the use of each above-mentioned operations and how to perform them.

Definitions

It is necessary to understand the different components of Halogen and to understand it's definitions.

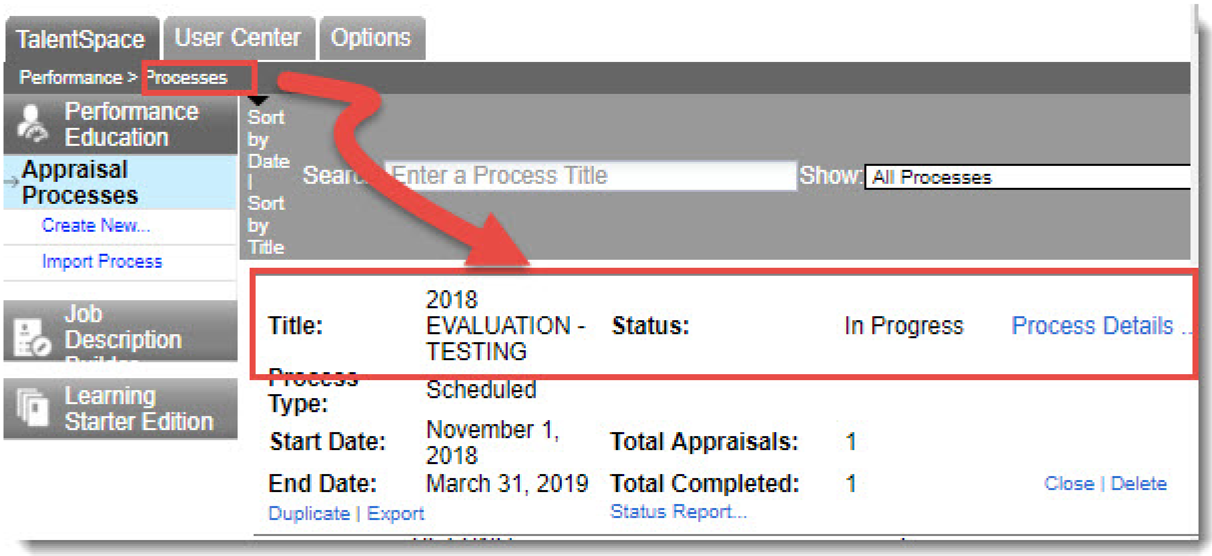
Differences between the user interface and the HR Admin Control Center in Halogen.

- 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.



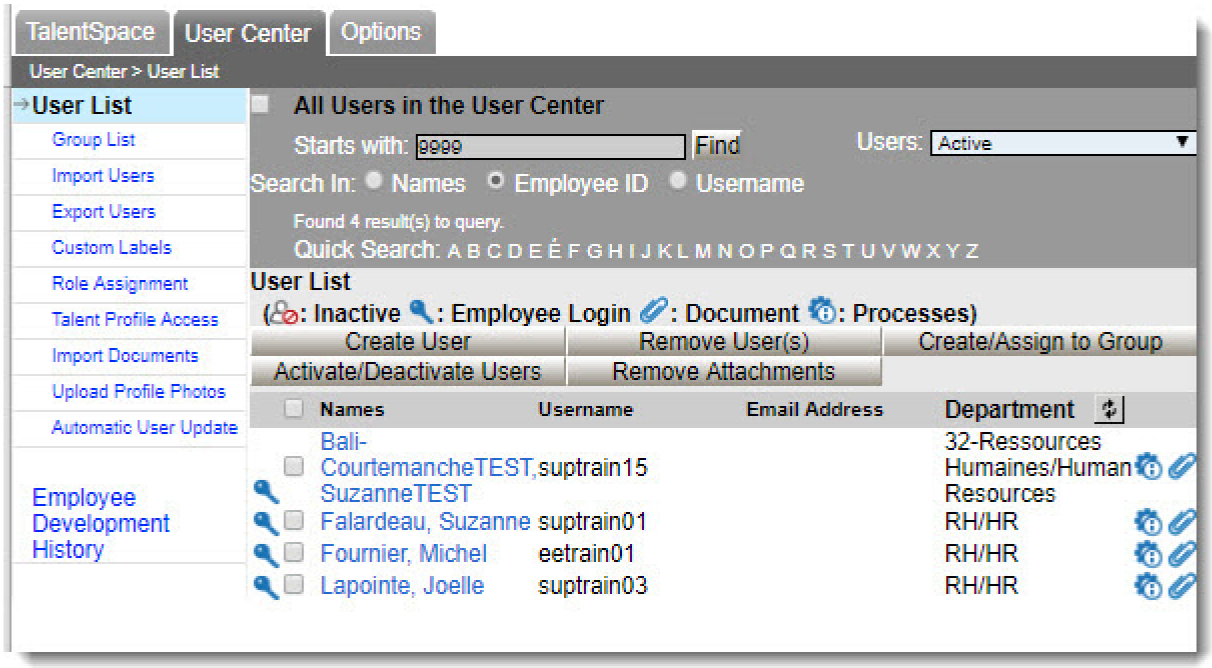
- The HR Admin Control Center is the back end interface that enables the administration of a specific process. This interface is used by designated HR

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.



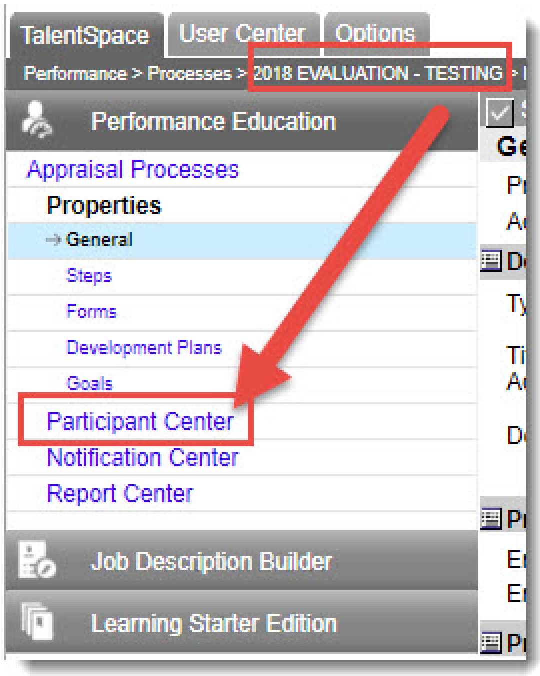
The User Center and the Participant Center

- 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



.

- 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.

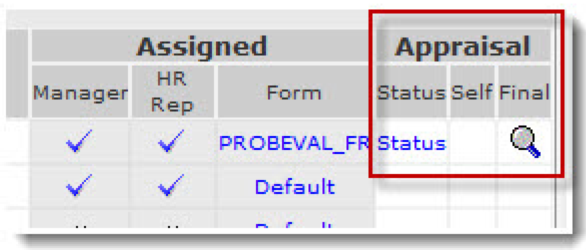
The Assigned section of the Participant Center allows the user to see if a supervisor (Manager), an HR Administrator (*HR Rep*) and a *Form* have all been assigned to each participant in an ongoing process. If either one of these is missing, then it must be added.

Participant	Assigned: Manager	Assigned: HR Rep	Assigned: Form
Bonneville, Jeff	✓	✓	EVAL2016
Bouchard, Lynne	✓	×	Default
Falardeau, Suzanne	✓	✓	Default
Lapointe, Joelle	×	✓	Default

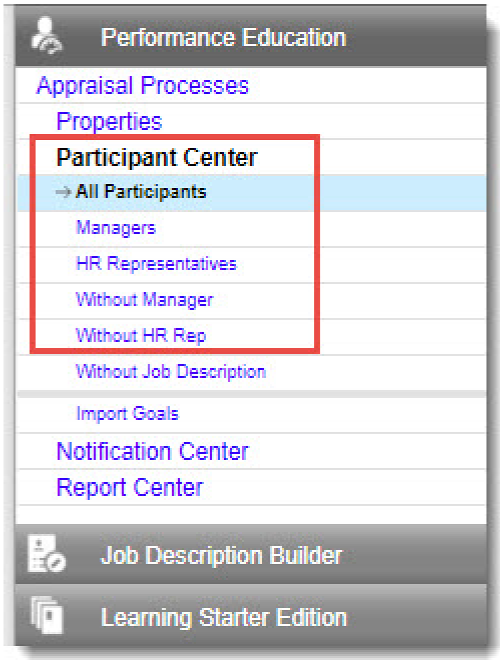
The Appraisal section of the Participant Center allows the user to see if the participant must be evaluated and which steps need to be completed.

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 ongoingongoing 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).

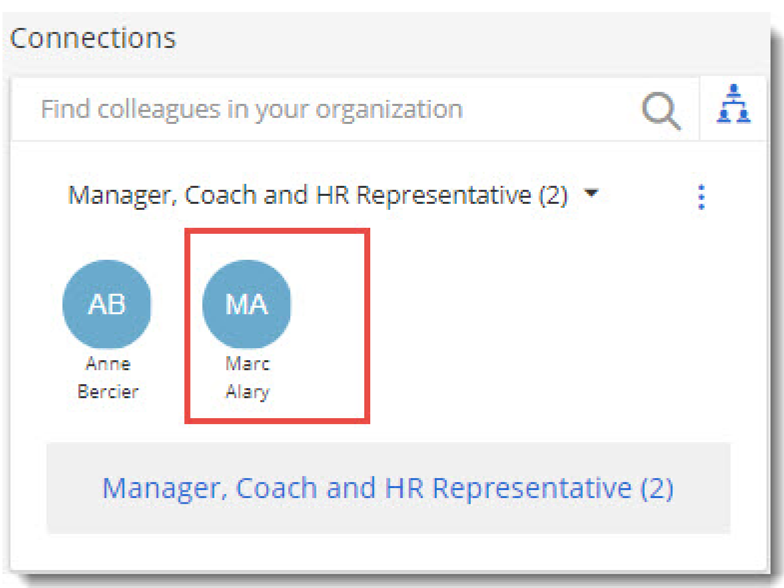


The left menu of the Participant Center allows the user to perform many operations such as browse the list of participants assigned to the ongoing process, browse the list of HR Administrators assigned to the process, browse the list of participants that have a role of supervisor (Manager) and last, 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.

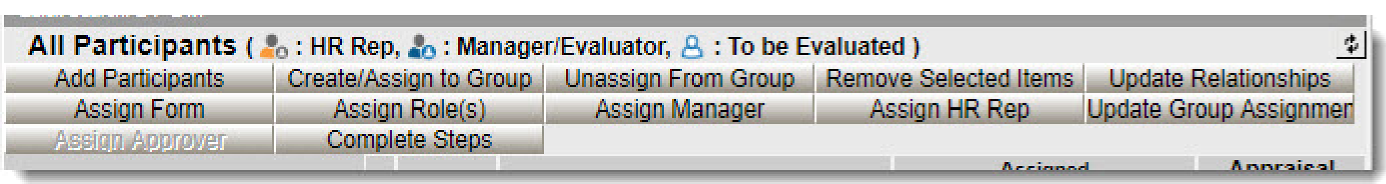


- The temporary supervisor
  However, when an ongoing process cannot be completed because the supervisor is absent, the HR Administrator can assign a temporary supervisor to the process. When the process is completed, the temporary supervisor disappears.

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:



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

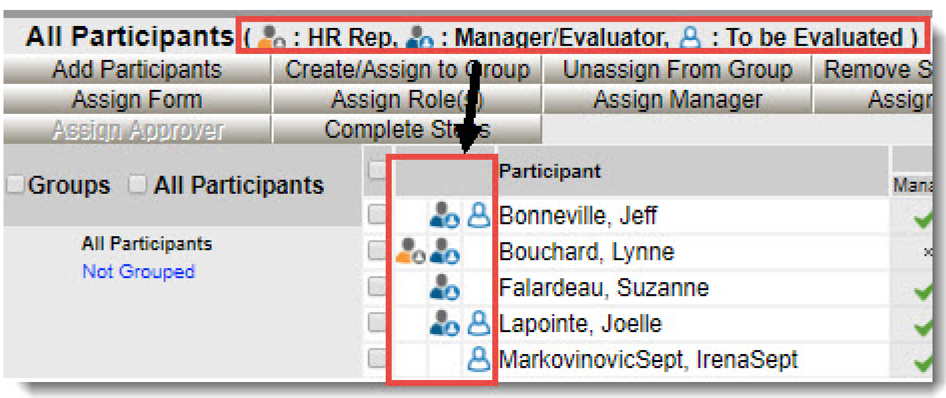
The HR Administrator can see which role(s) have been assigned to each participant of his/her unit.

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.



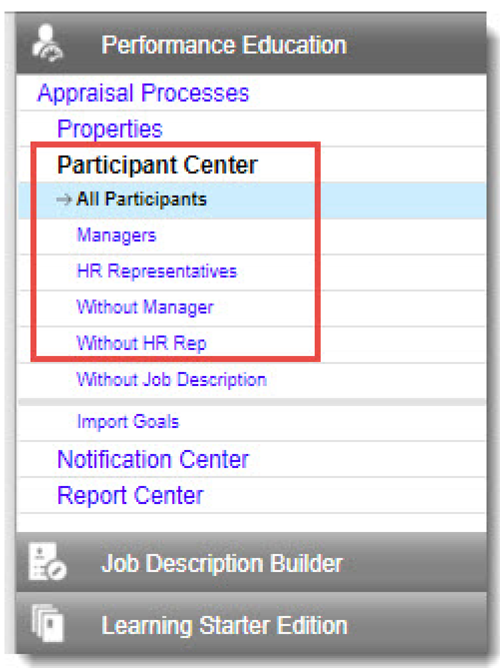
The Participant Center

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.

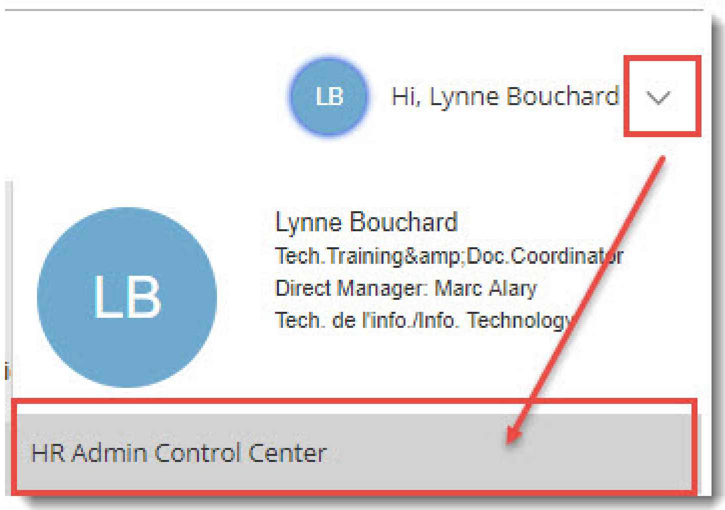
1. The option All Participants displays the list of all participants assigned to the ongoing process, regardless of their role.

Assigning a Role

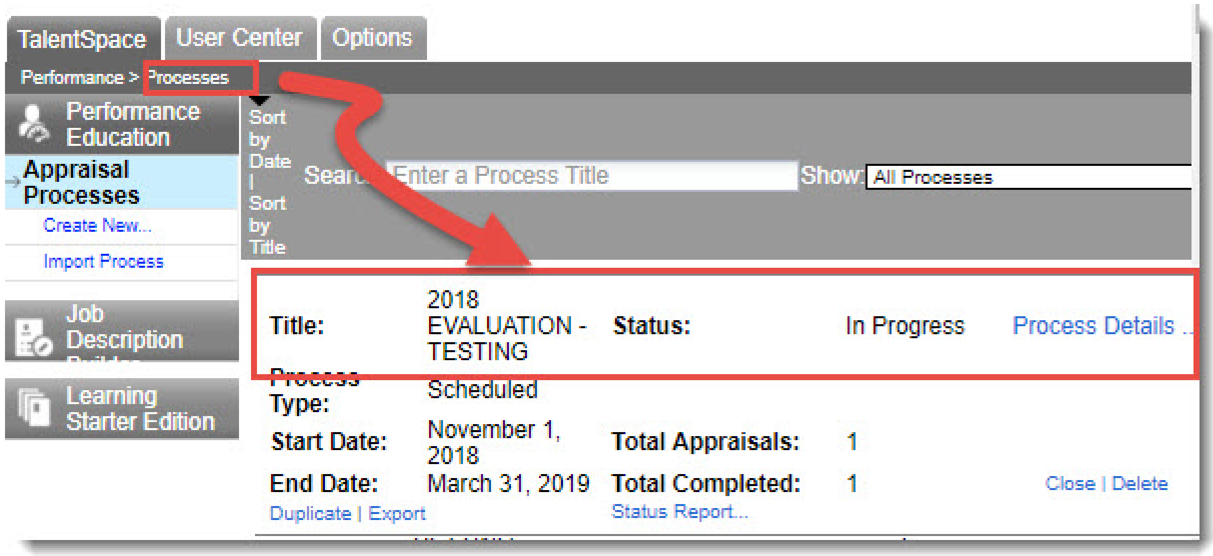
You can assign a role to a participant in an ongoing process.
For example, one of the employees of your unit has recently become a supervisor, you will need to assign the Manager role so that he/she can approve the forms submitted by his/her direct reports.

Opening the *HR Admin Control Center*

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

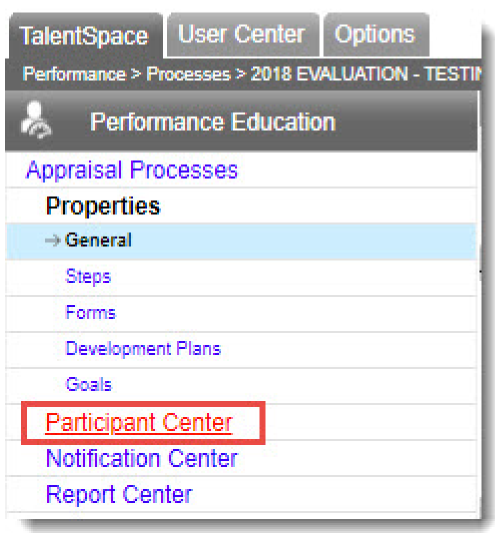


2. Select the process by clicking on Process Details.



Opening the *Participant Center*

1. Click Participant Center.

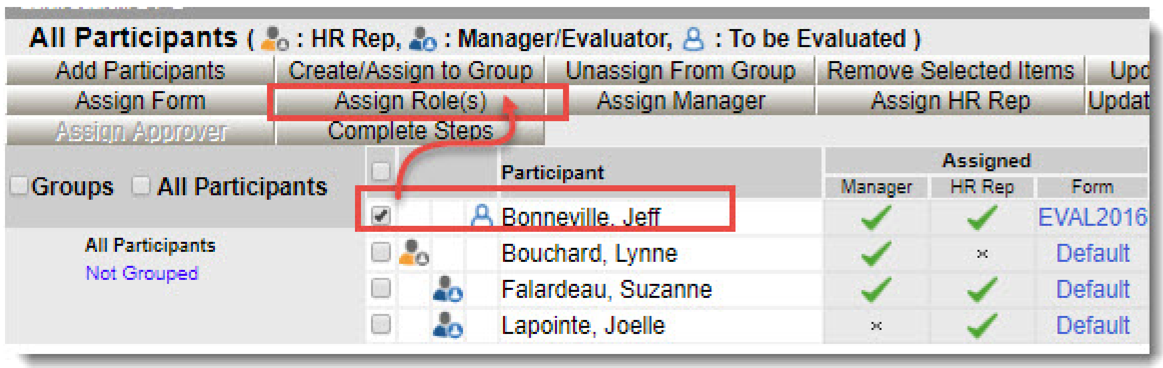


Role Assignment

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

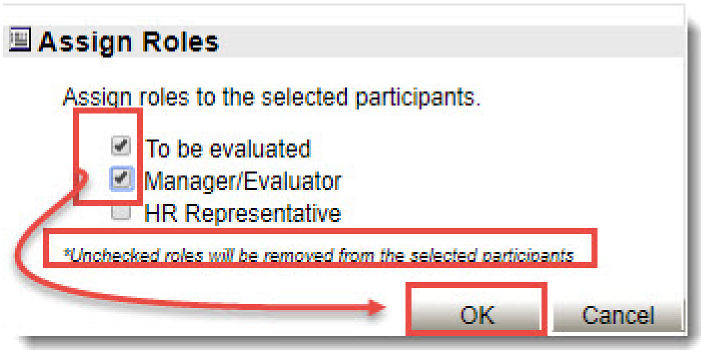
1. Select the employees for whom you are assigning a role by clicking in the box beside the employee name.

2. Clik Assign Role(s).

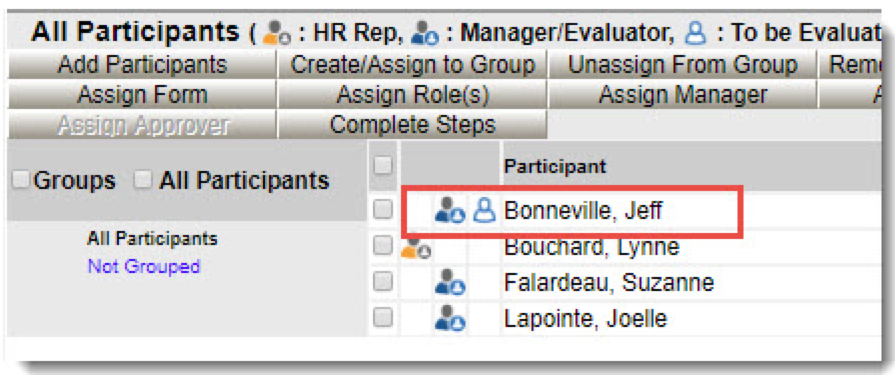


Attention: the selected role(s) will replace the existing one(s). If the employee must be evaluated and is a supervisor, select both **To be evaluated** and **Manager/ Évaluator** roles.

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

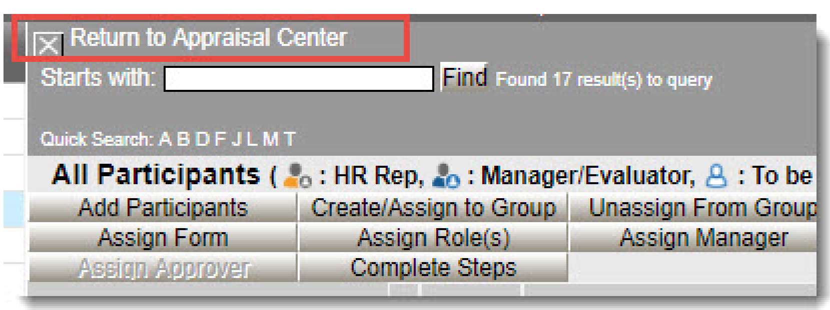


The **Manager/Evaluator** role was added to the existing **To be evaluated** role.

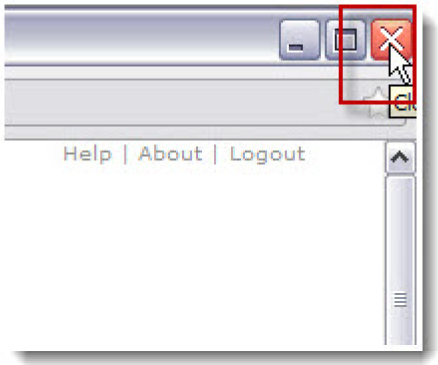


Returning to the user interface

1. Click Return to Appraisal Center.



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

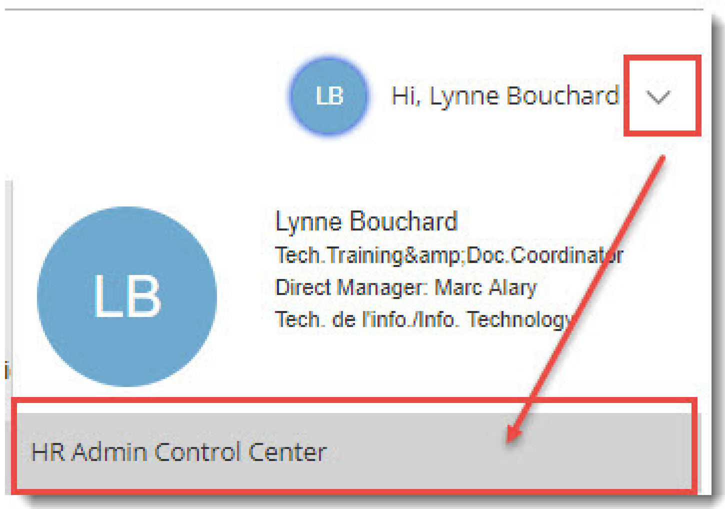


Adding a participant

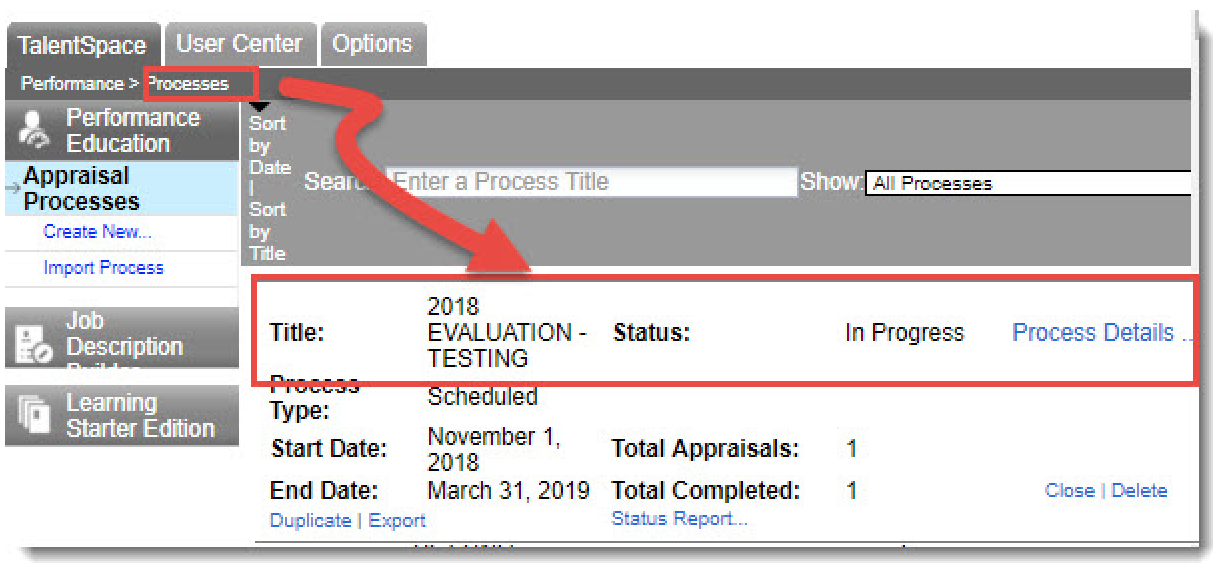
The Participant Center is used to add users in ongoing processes, to assign supervisor, HR Administrators or 2nd level supervisors in ongoing processes. The Participant Center takes user data from the User Center but since the HR Administrator can only see employees from his/her unit, it is possible 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

Opening the *HR Admin Control Center*

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

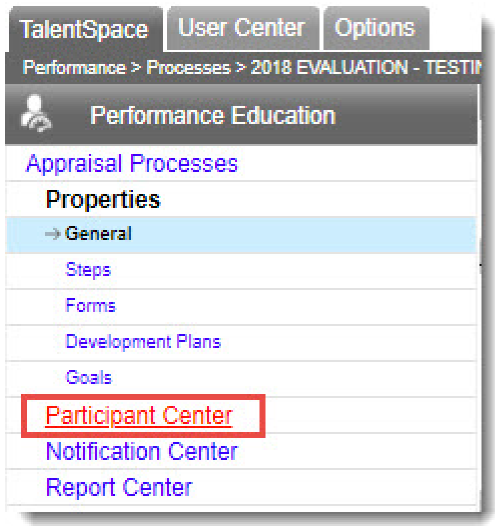


2. Select the process by clicking on Process Details.



Opening the *Participant Center*

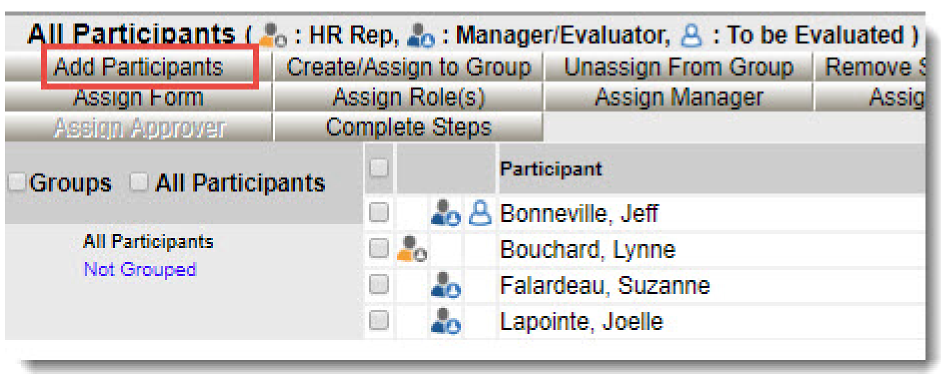
1. Click Participant Center.



Adding a participant

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

1. Click Add Participant.



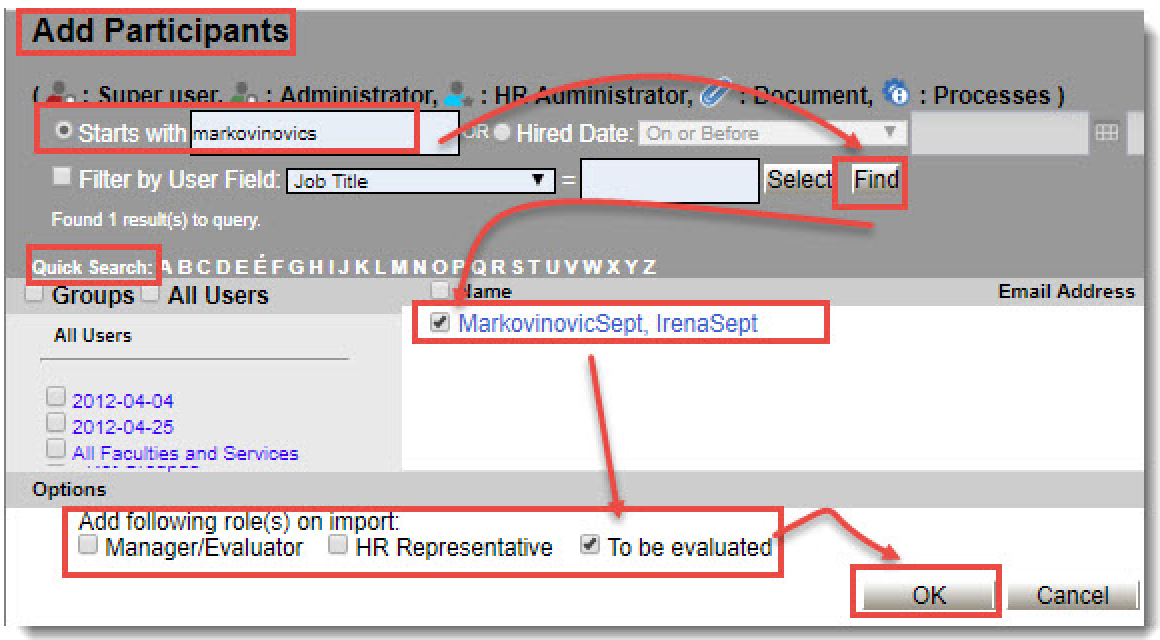
2. Find the employee to be added ti the ongoing process. You can search the employee two ways:

   - 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.

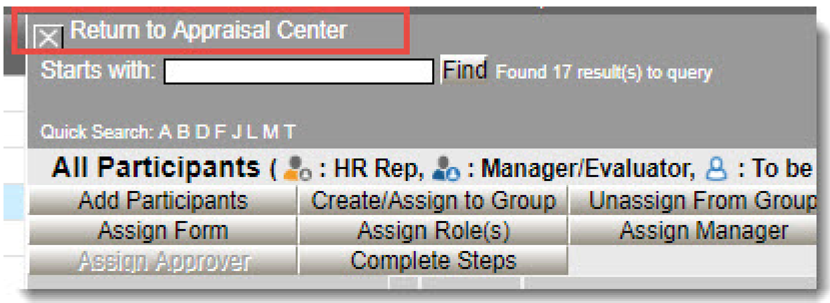
4. Select the participant role in the Options section.
   If the participant must be evaluated, select nothing. The To be Evaluated role is given automatically by the system when adding a participant.

5. Click on OK.

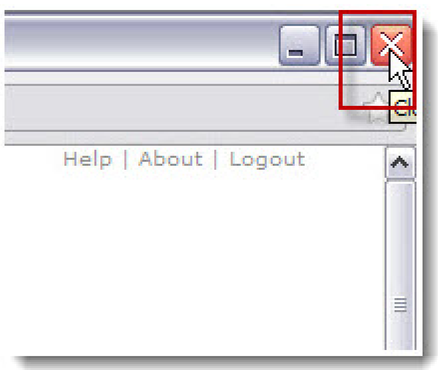


Returning to the user interface

1. Click Return to Appraisal Center.



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



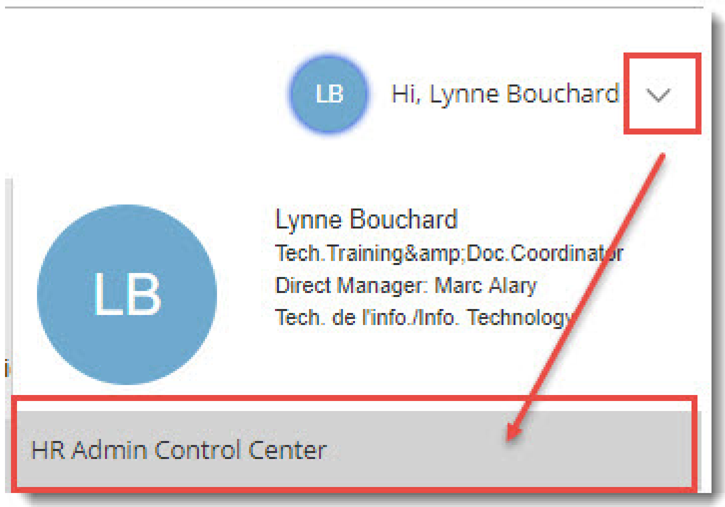
Finalization of a step

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

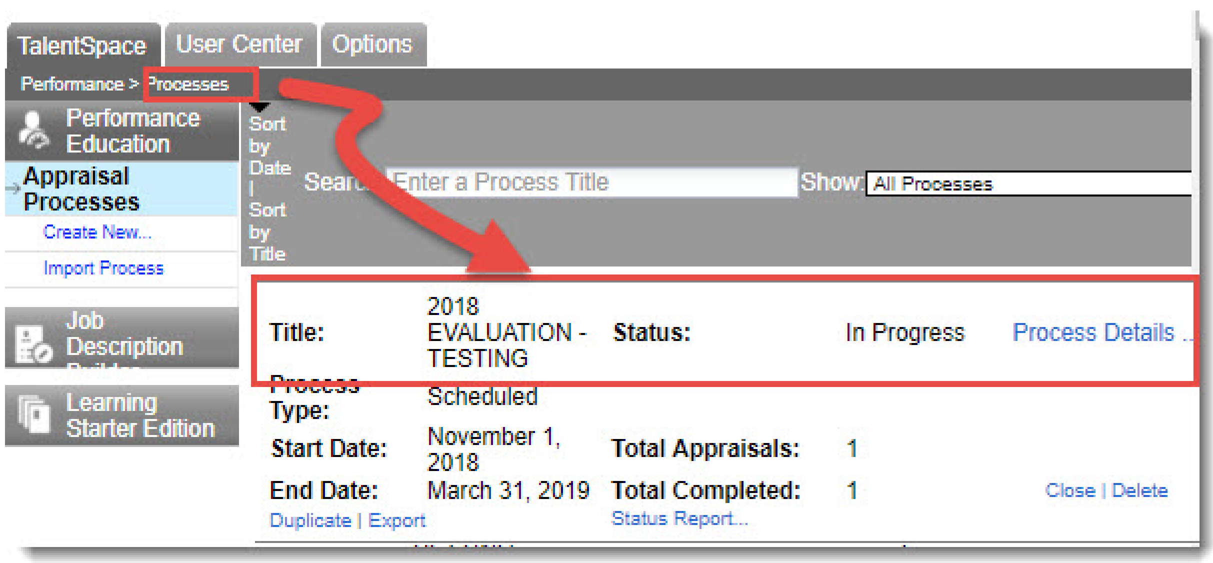
For example, in the annual evaluation process, the second level supervisor must give his/her final approval at the last step. If the second level supervisor is sick or absent and will not be able to give the final approval before the process due date, the HR Administrator can force the finalization of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

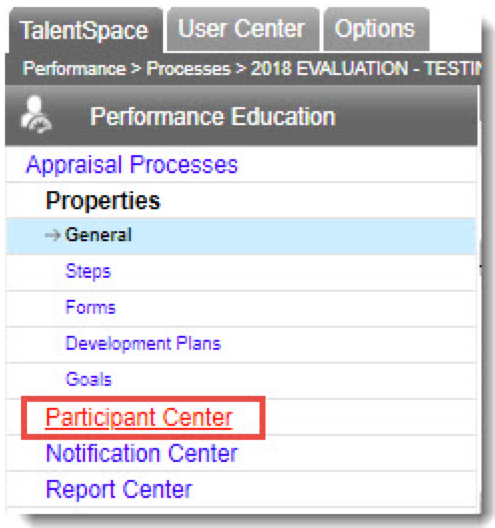


2. Select the process by clicking on Process Details.



Opening the *Participant Center*

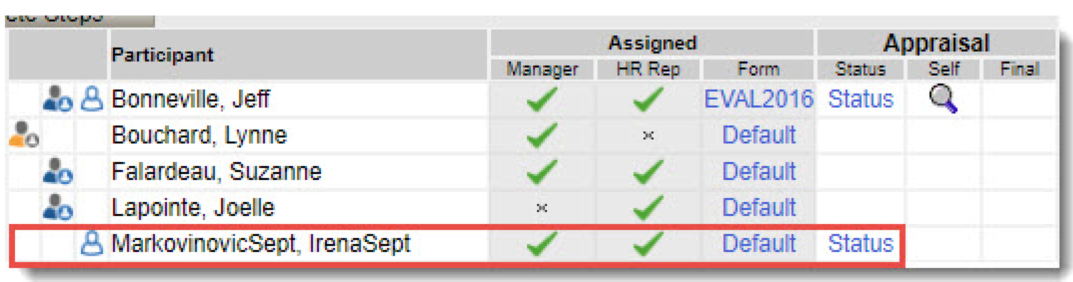
1. Click Participant Center.



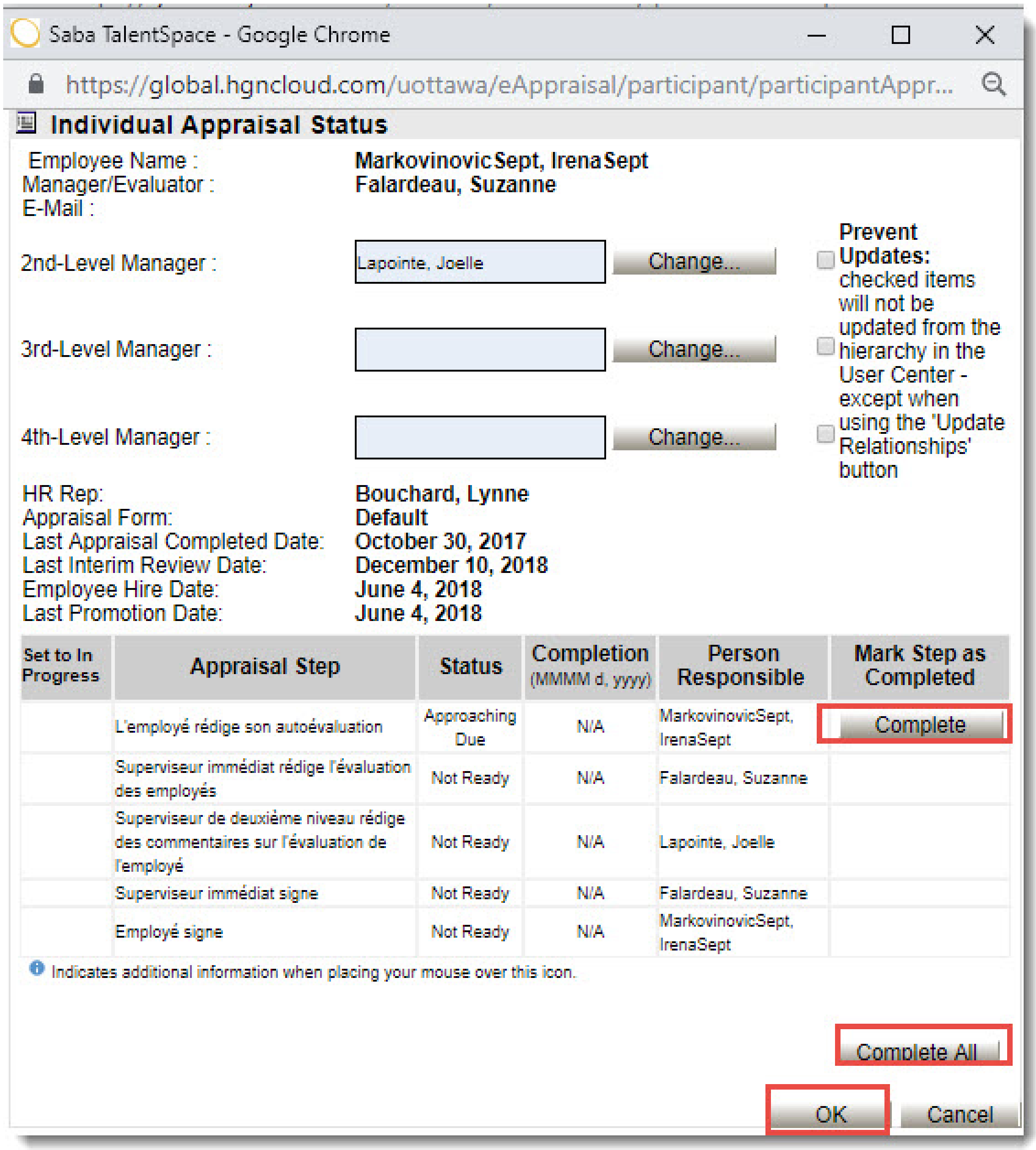
Selection of the participant and finalization of a step

You can complete one step or all steps at once.

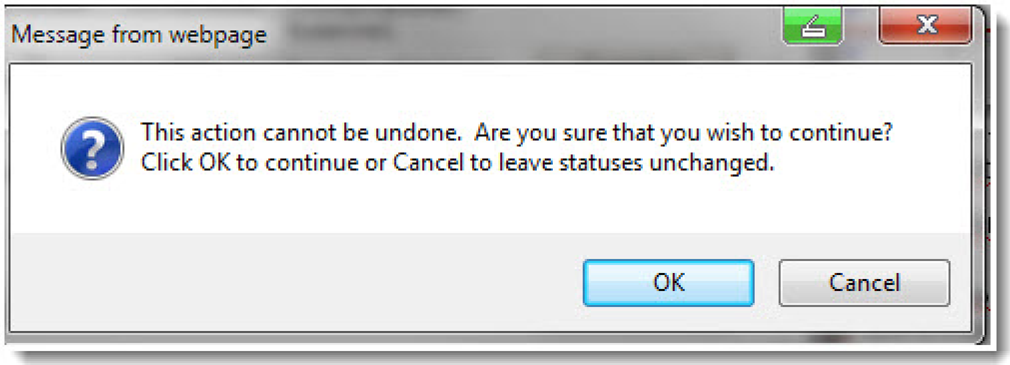
1. Click Status of the employee for whom you need to force the finalization of a step.



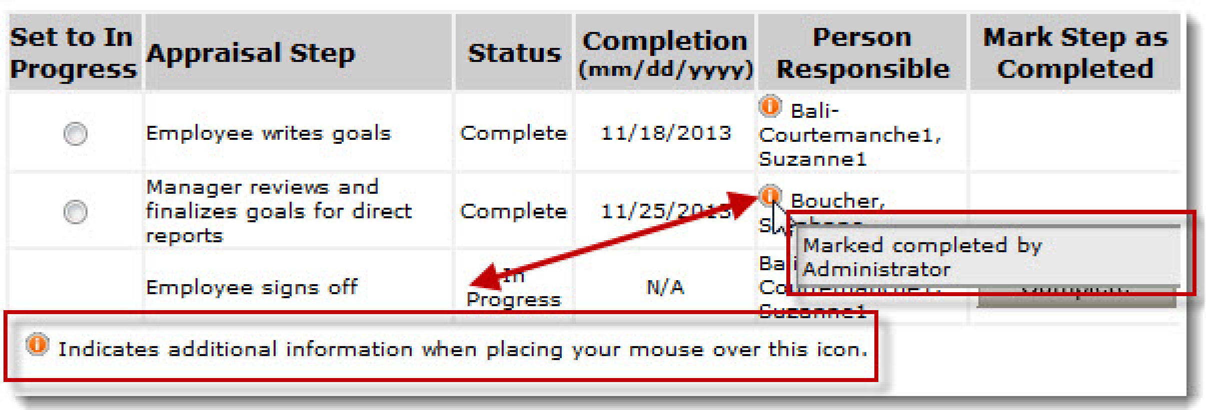
2. Click Complete or Complete All (to complete all the steps of the process).



3. Click OK.



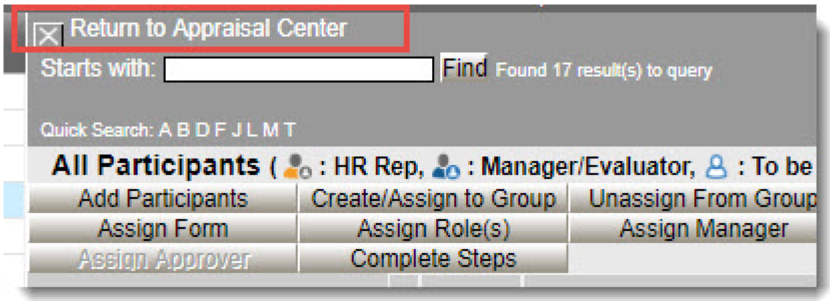
The finalization of the step has been completed. Placing the mouse over the additionnal info icon will show that the step was completed by an HR Administrator.



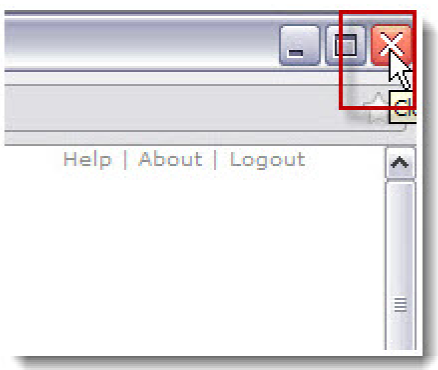
4. Click OK.

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 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.

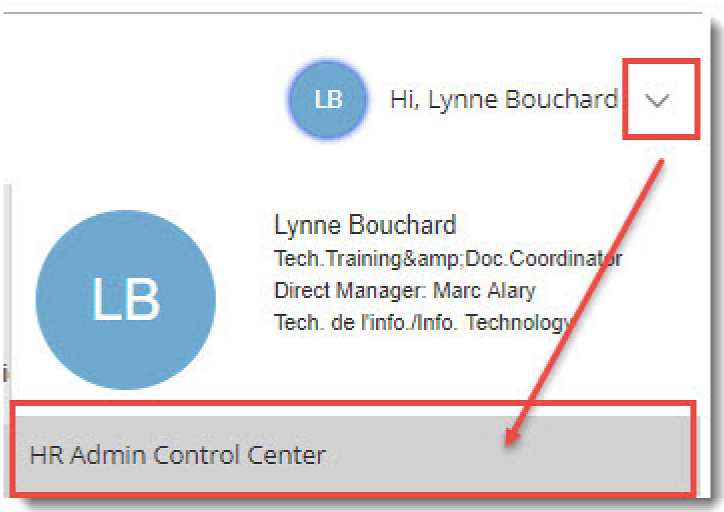
3. It is possible to rollback the status of a step so that the person responsible of the step can return to the form, modify it and re-submit it when completed.

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

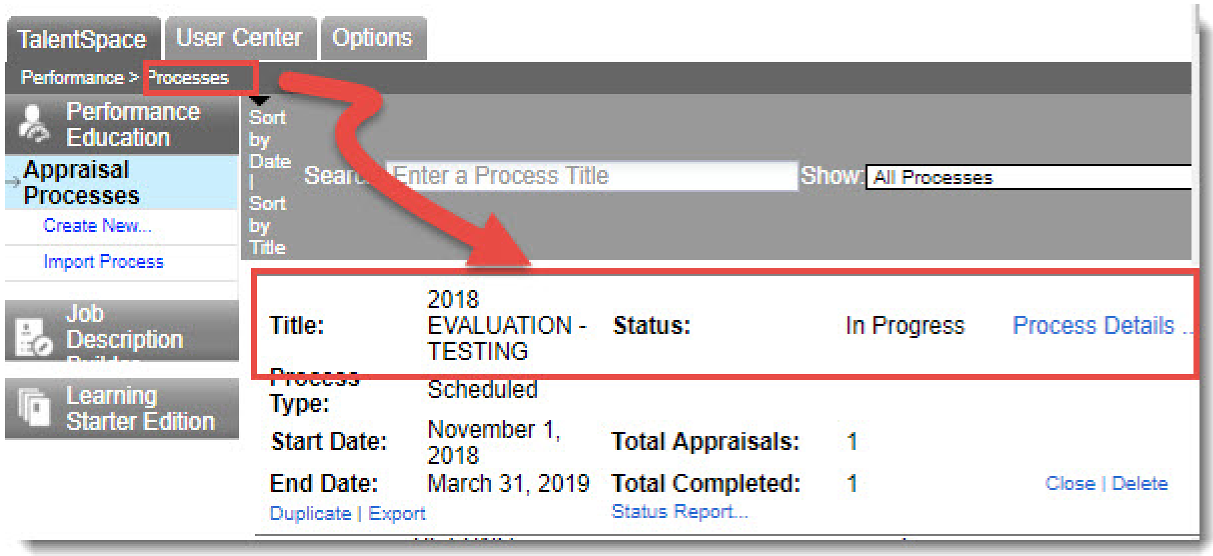
4. It is possible to return to most of the steps of a process without having to delete the form filled by the participant. However, if you must return the form to an employee (the first step of the process) so that he/she is able to modify it, you will have to delete the form filled by the supervisor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

Opening the *HR Admin Control Center*

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

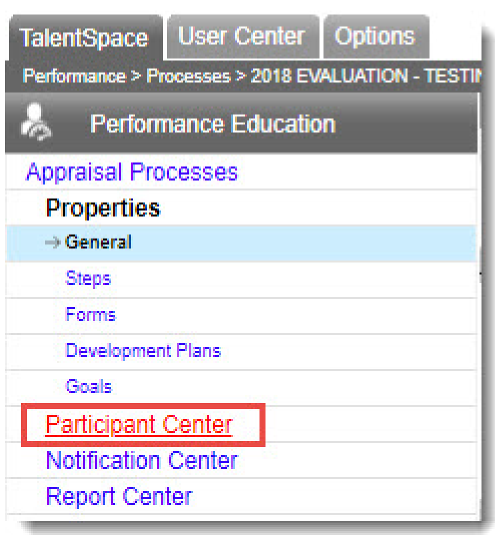


2. Select the process by clicking on Process Details.



Opening the *Participant Center*

1. Click Participant Center.



Selection of the participant and 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.

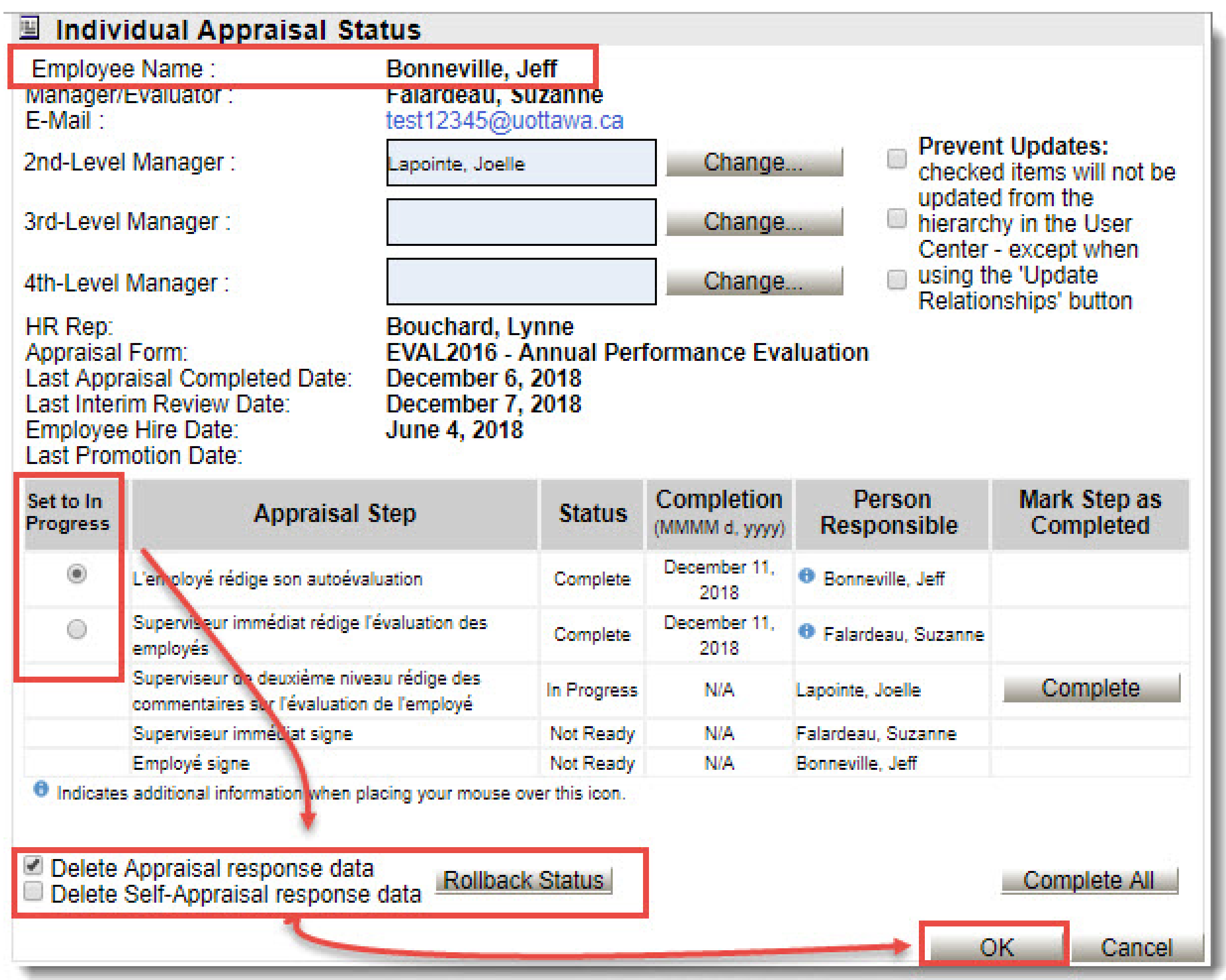
Participant	Assigned			Appraisal		
	Manager	HR Rep	Form	Status	Self	Final
Bonneville, Jeff	✓	✓	EVAL2016	Status		
Bouchard, Lynne	✓	×	Default			
Falardeau, Suzanne	✓	✓	Default			
Lapointe, Joelle	✓	✓	Default	Status		
MarkovinovicSept, IrenaSept	✓	✓	Default	Status		

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.

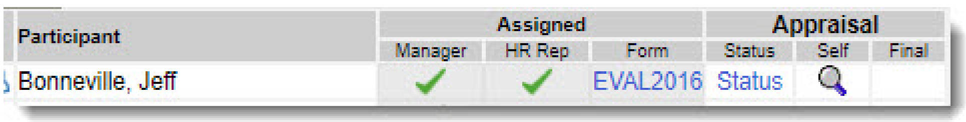
(Optional) Click on the option that identifies which form will be deleted with the roll-back operation:

- 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).



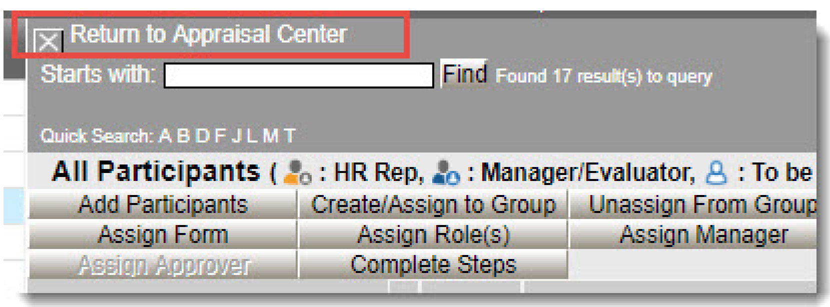
4. Click Rollback Status.

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.

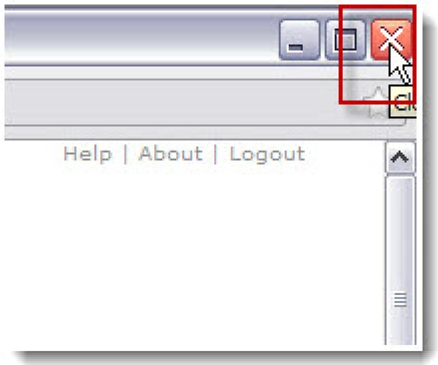


Returning to the user interface

1. Click Return to Appraisal Center.



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

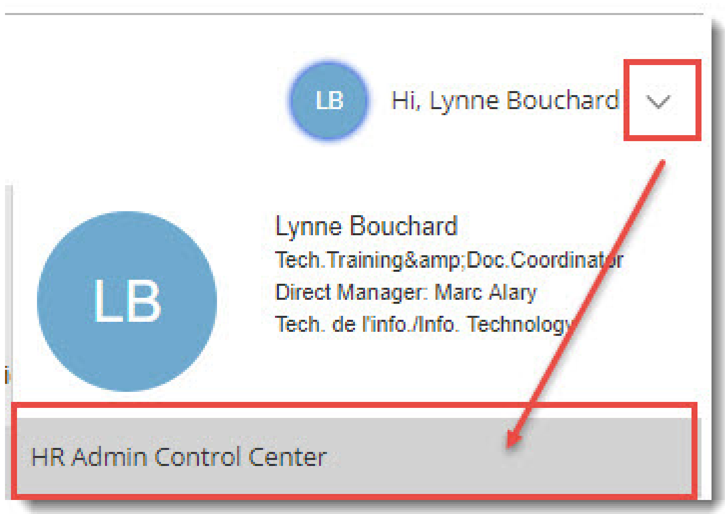


Changing the Supervisor

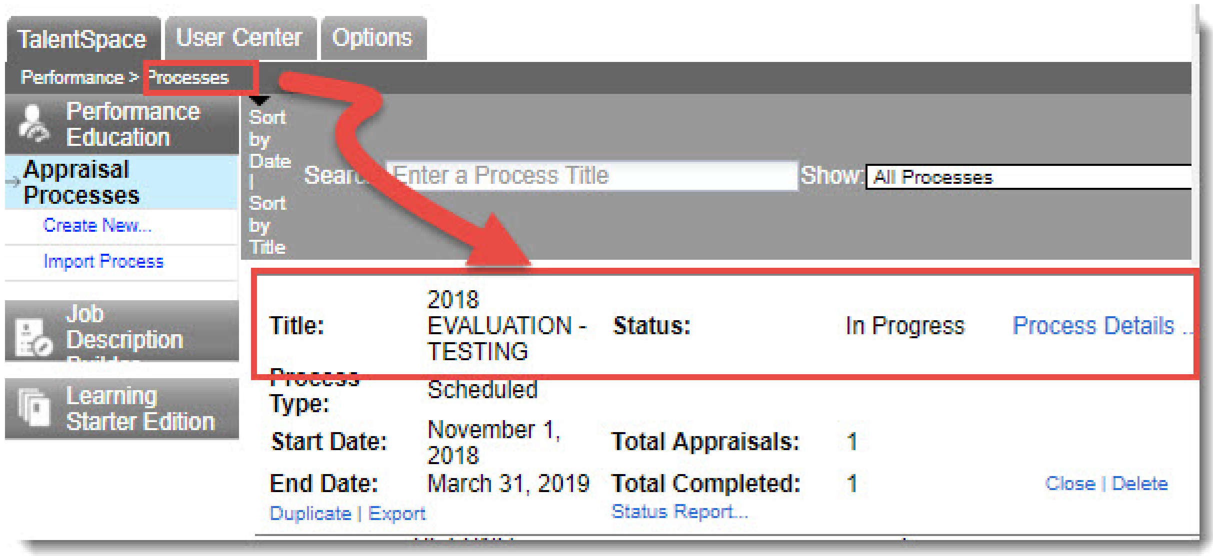
The HR Administrator can **ONLY** assign a temporary supervisor in an ongoing process.

Opening the *HR Admin Control Center*

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

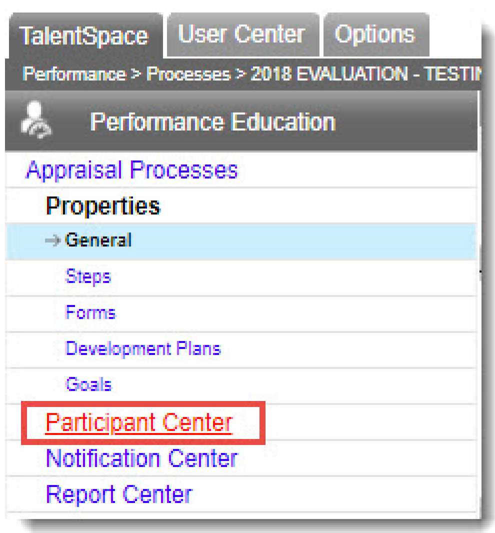


2. Select the process by clicking on Process Details.



Opening the *Participant Center*

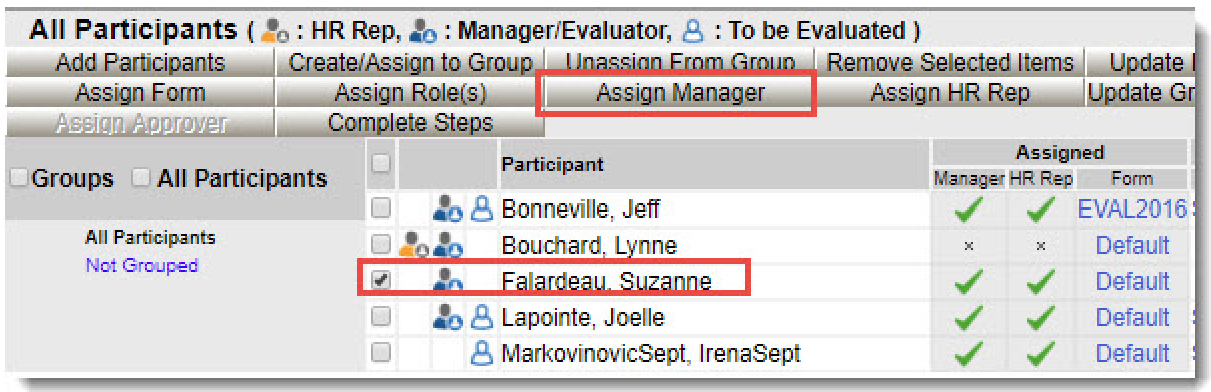
1. Click Participant Center.



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.



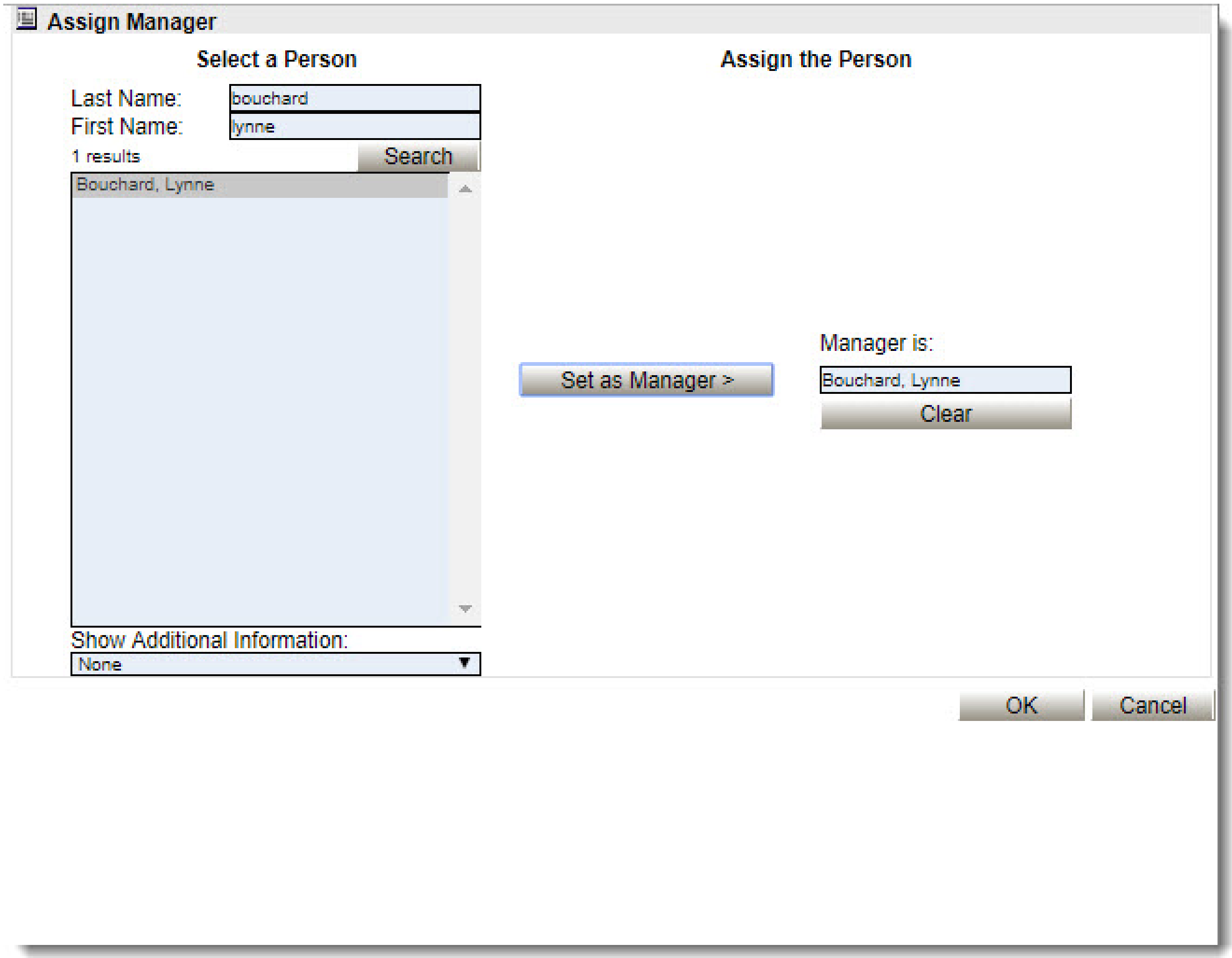
Searching supervisor name

To assign a supervisor, you must first find him/her. It it possible that the employee already has an assigned supervisor but if he/she cannot complete the on-going processus, 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.

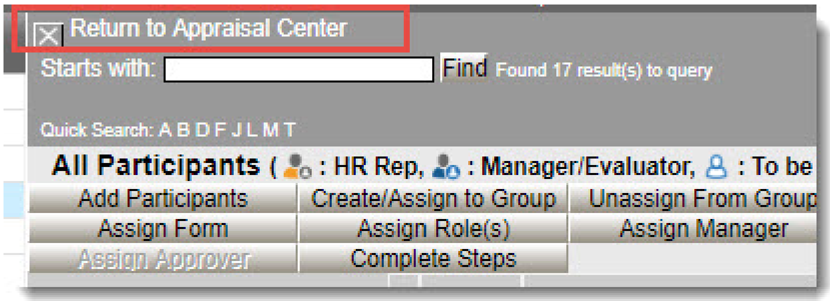
3. Type the supervisor's Last Name.



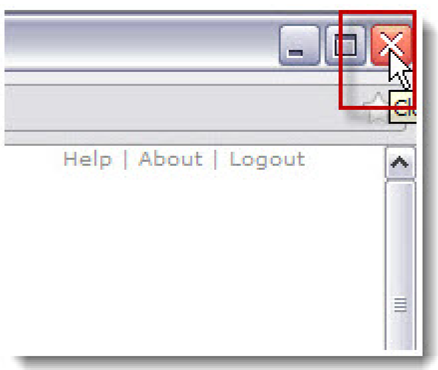
4. Type the supervisor's First Name.
5. Click Search.
6. Click on the supervisor's name to assign.
7. Click on Set as Manager.
8. Click OK.
   A pop-up window will appear to indicate that Halogen is currently assigning the temporay supervisor.

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.



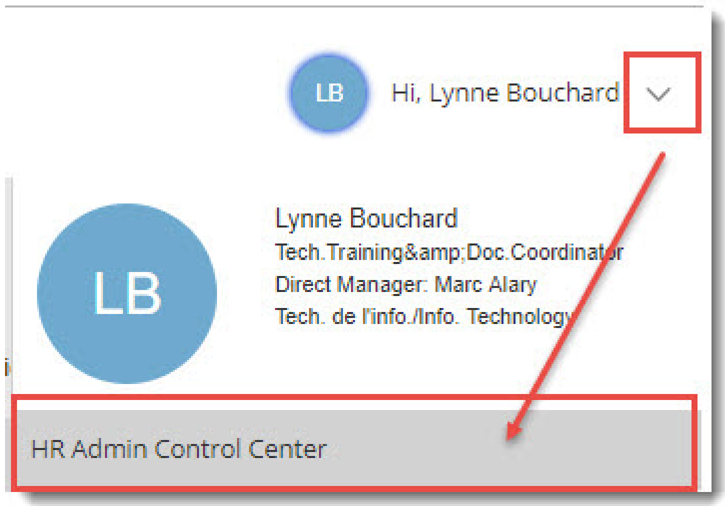
Assigning the Form

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

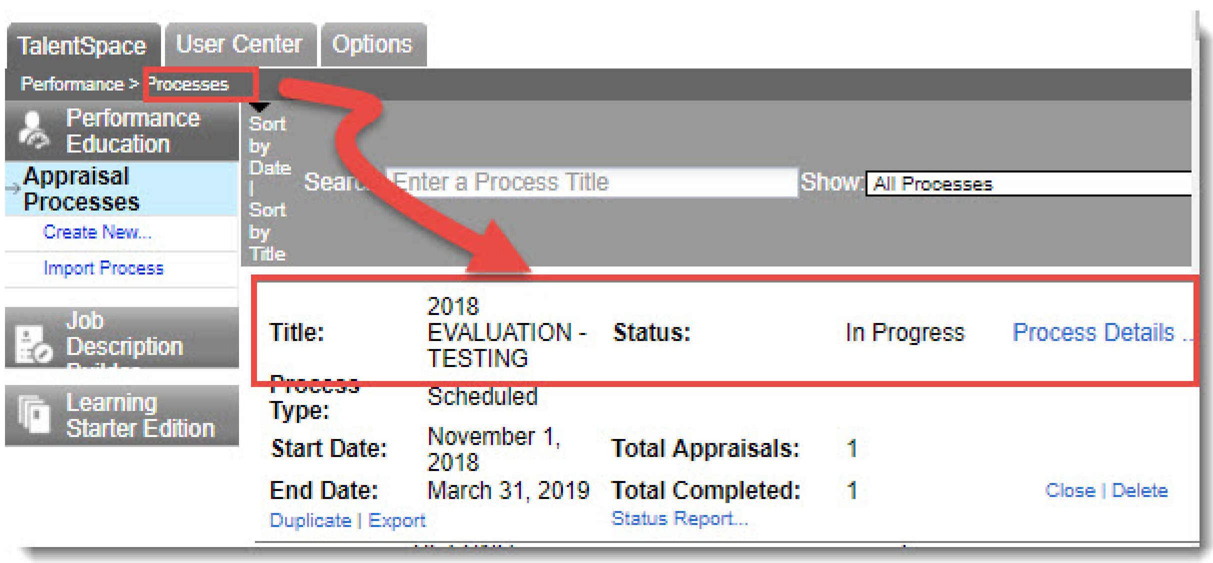
However, you might be asked to assign an English form to an employee that has French as his/her language of preference or vice-versa.

Opening the *HR Admin Control Center*

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

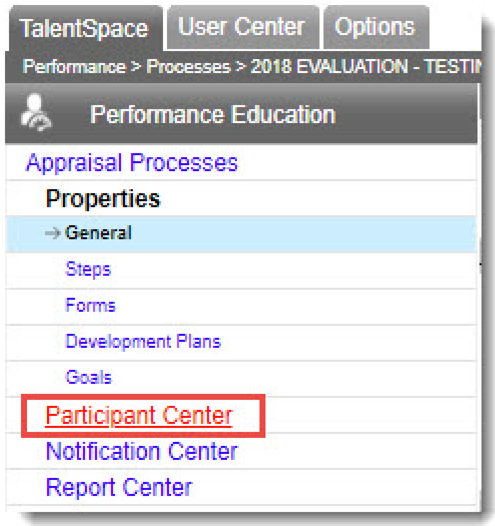


2. Select the process by clicking on Process Details .



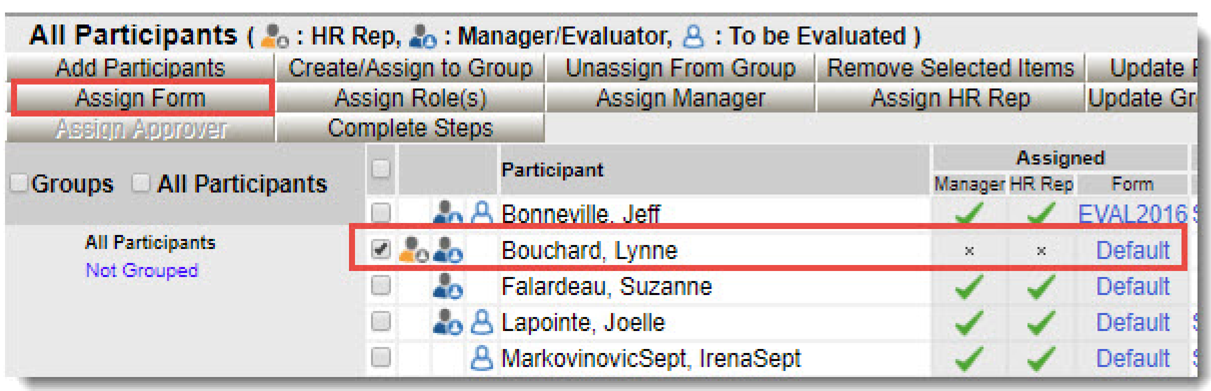
Opening the *Participant Center*

1. Click Participant Center.



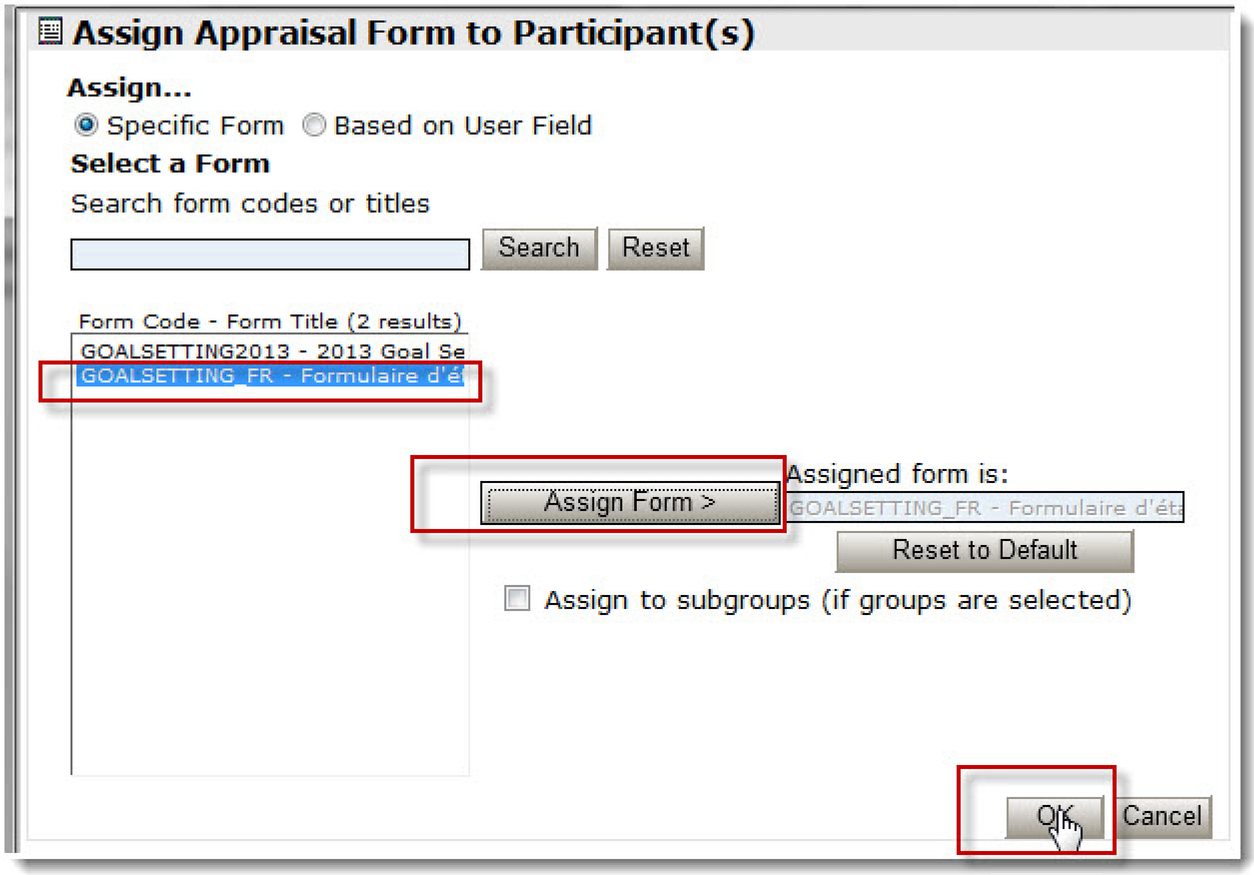
Assigning a Form

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

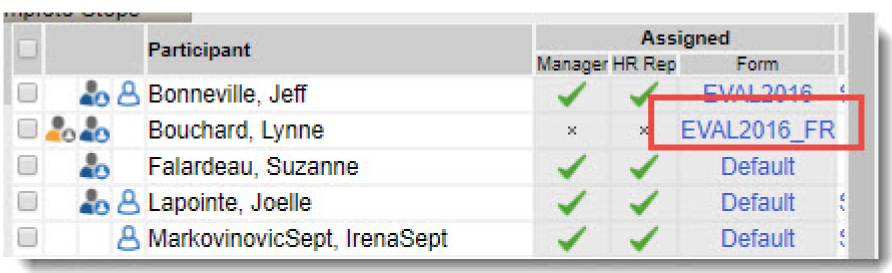


3. Click on the form name to assign.
4. Click Assign Form.

5. Click OK.

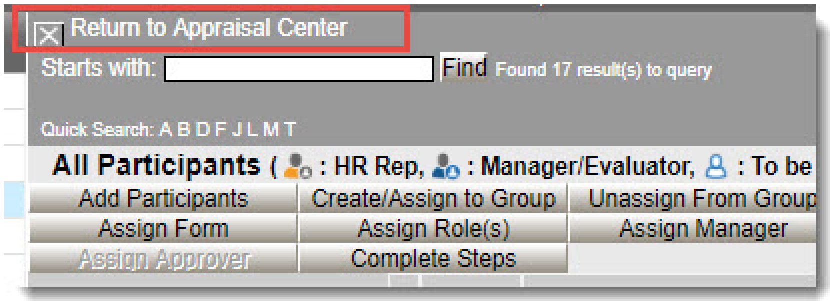


The system retuns to the Participant Center and displays the newly assigned form.

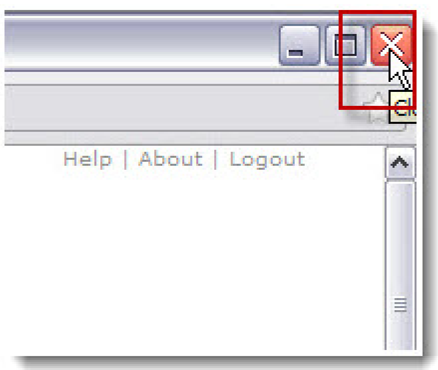


Returning to the user interface

1. Click Return to Appraisal Center .



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

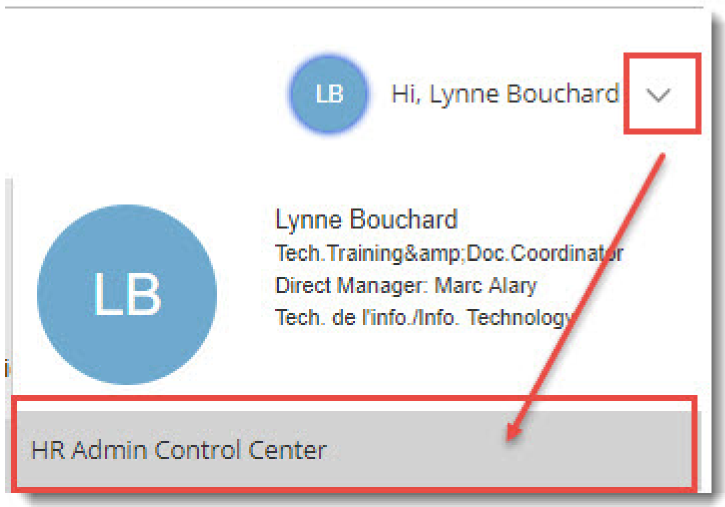


The 2nd level supervisor

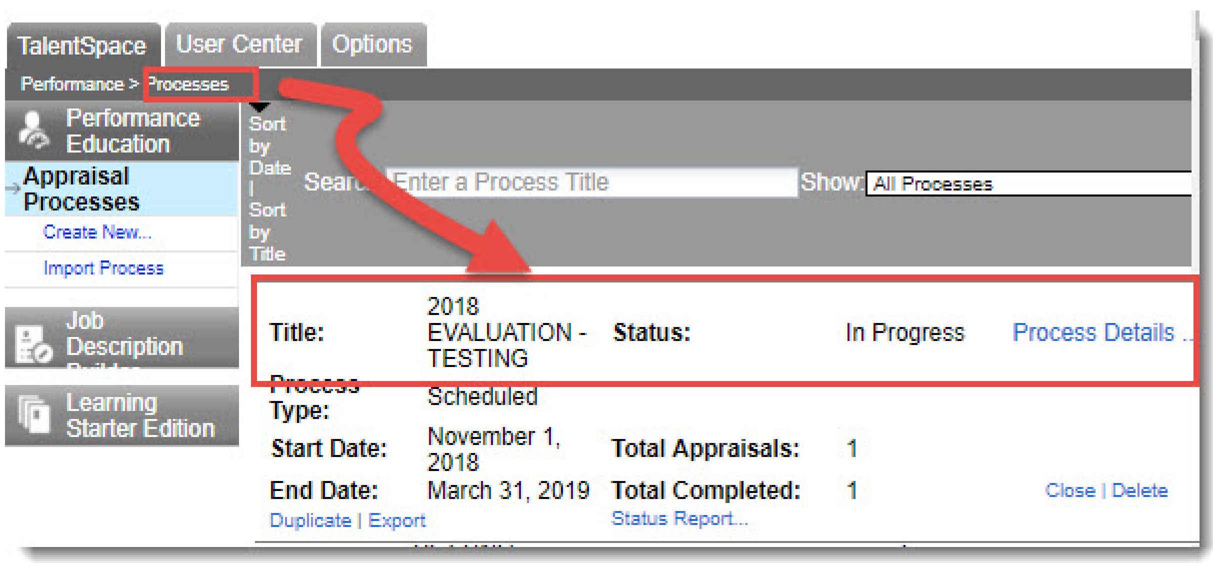
Some processes require that the 2nd level supervisor approves a form. The 2nd level supervisor can be modified to allow the completion of an ongoing process.

Opening the *HR Admin Control Center*

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

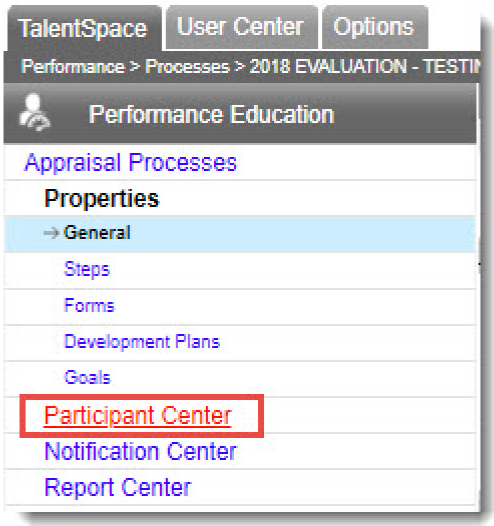


2. Select the process by clicking on Process Details.



Opening the *Participant Center*

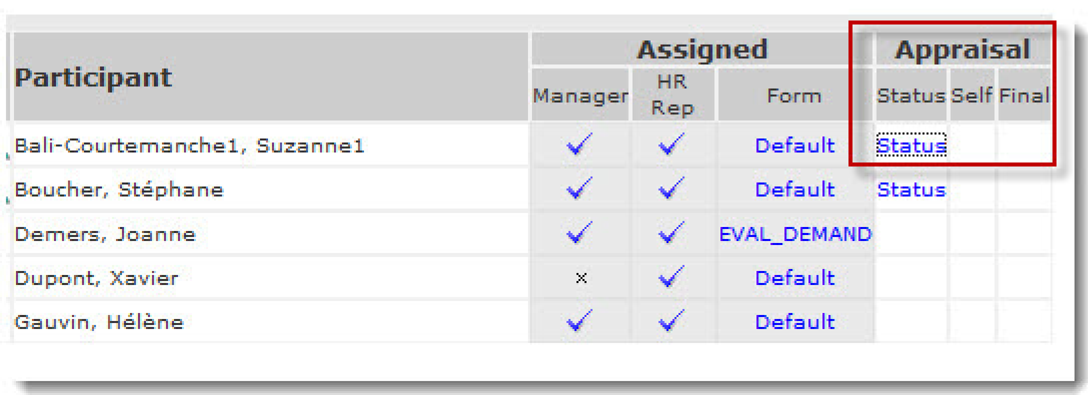
1. Click Participant Center.



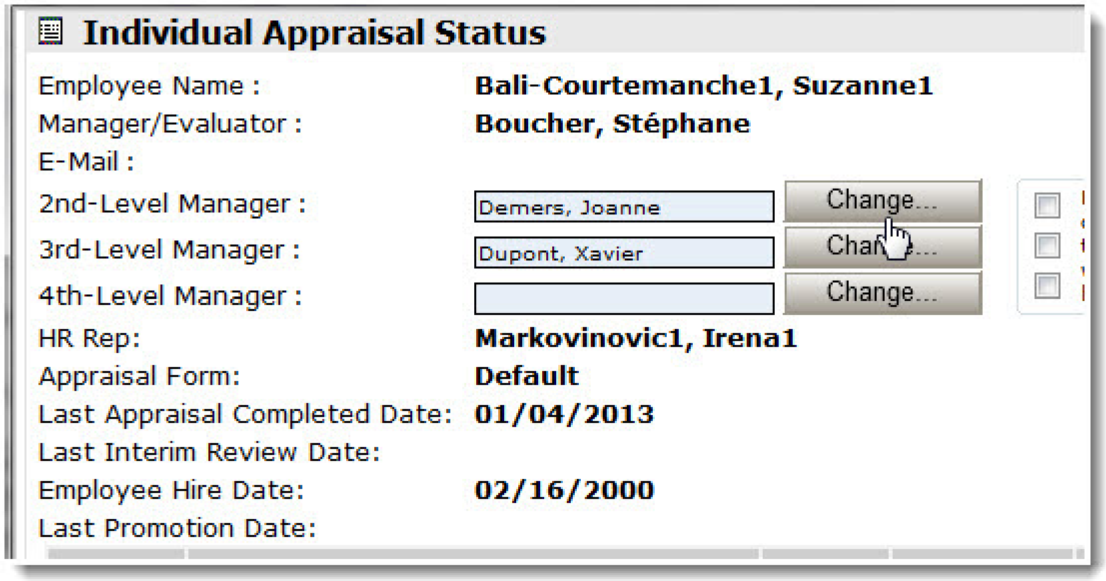
Assigning or removing the 2nd Level Supervisor

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.

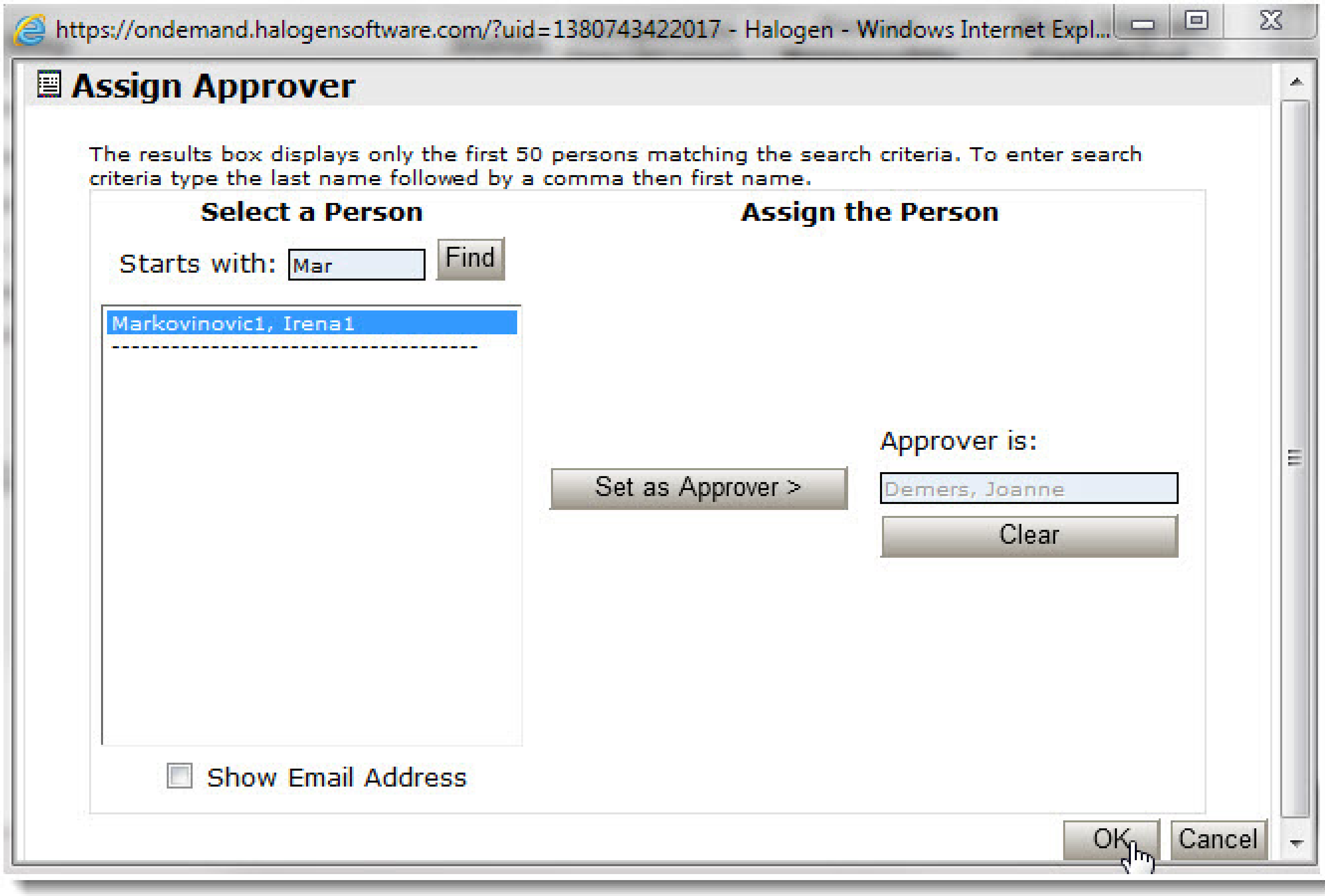
1. Click Status from the Appraisal section.



2. Click Change.

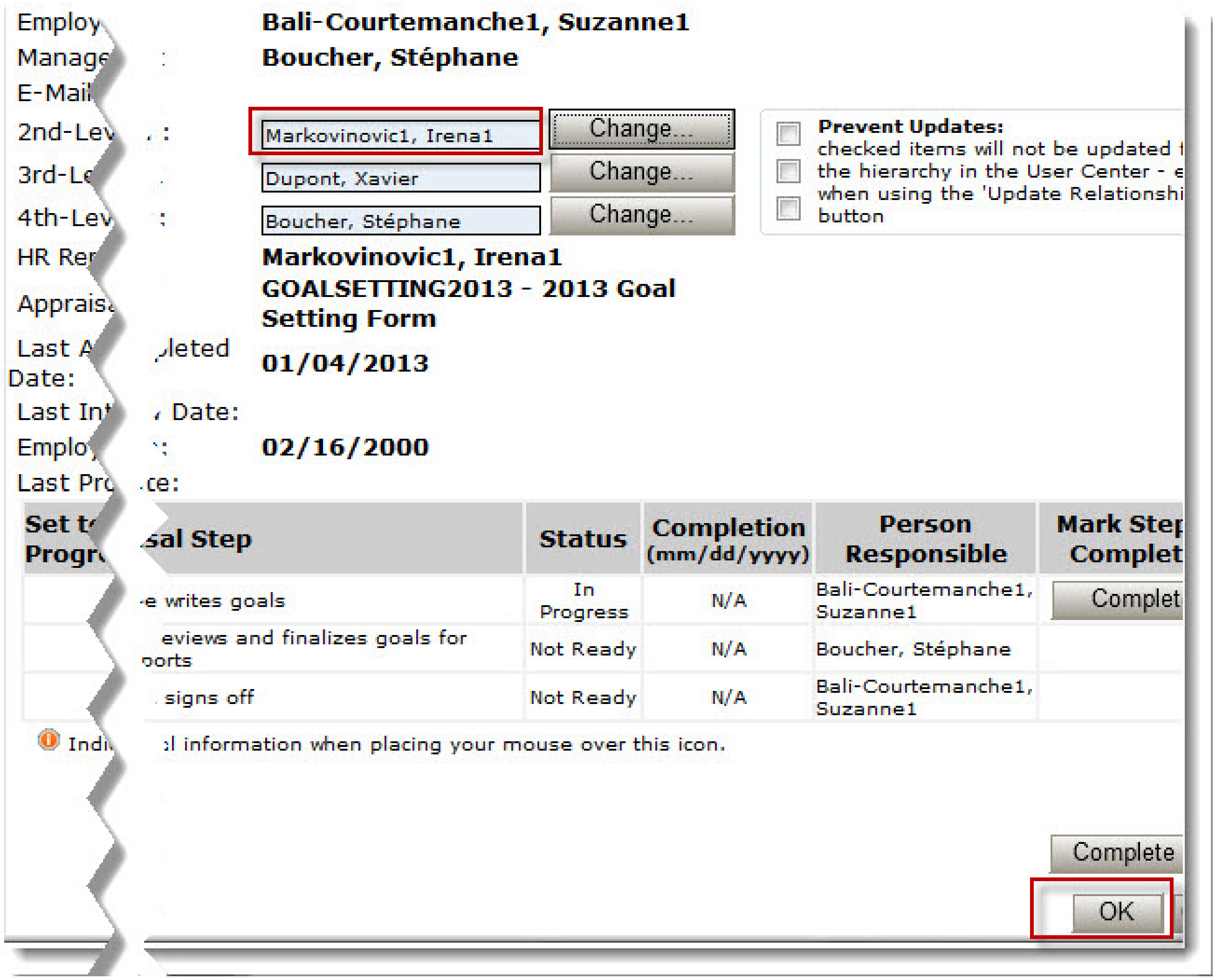


3. Type the three first letters of the 2nd level supervisor's lastname in Starts with.



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).

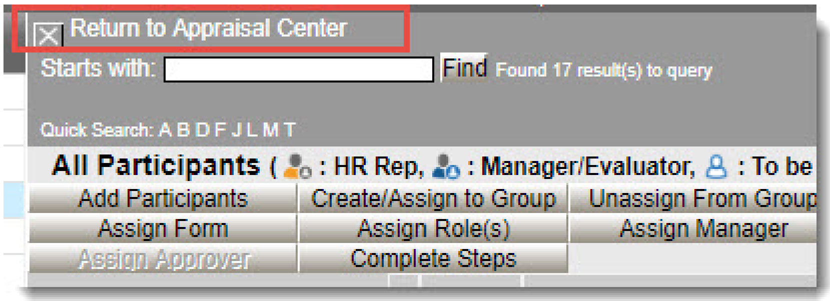
7. Click on OK.
   The system display the new 2nd level supervisor's name.



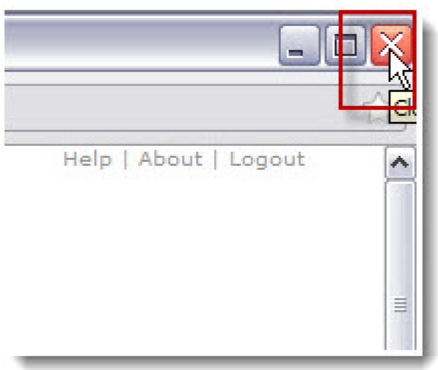
8. Click on OK.

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.



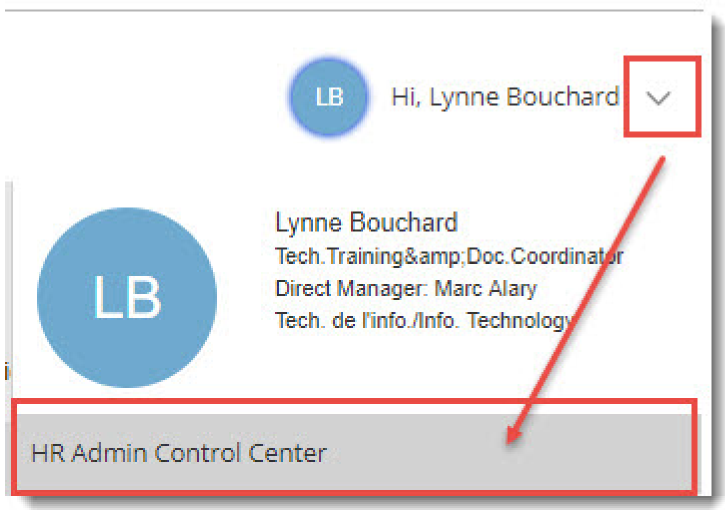
The Notification Center

The *Notification Centre*

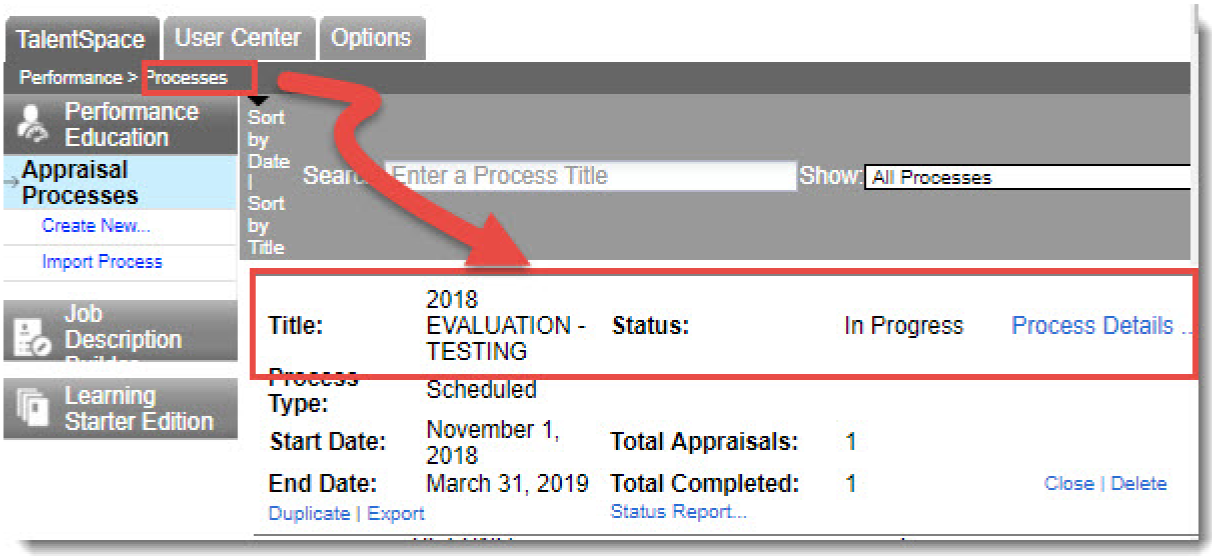
The *Notification Center* is used to create and configure the reminder and warning messages. The HR Administrator can browse all the messages that have been created for an ongoing process but he/she cannot modify them.

Opening the *HR Admin Control Center*

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

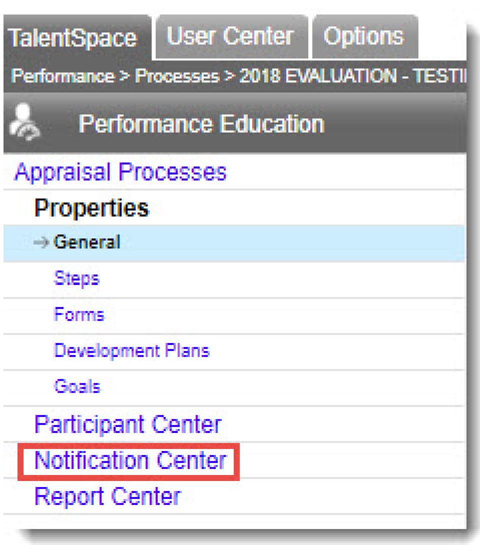


2. Select the process by clicking on Process Details.



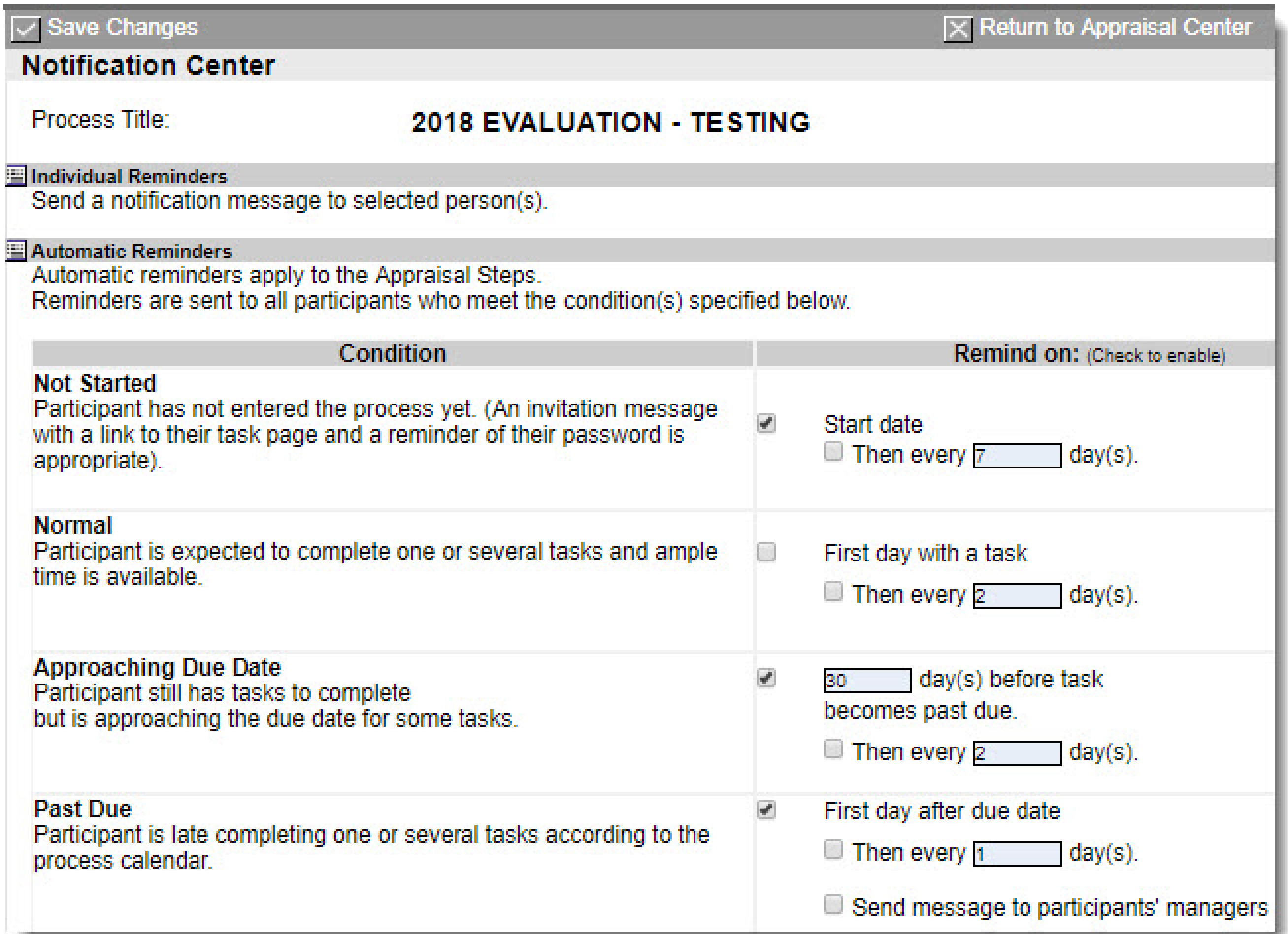
Notification Center

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.



The Report Center

The Report Center

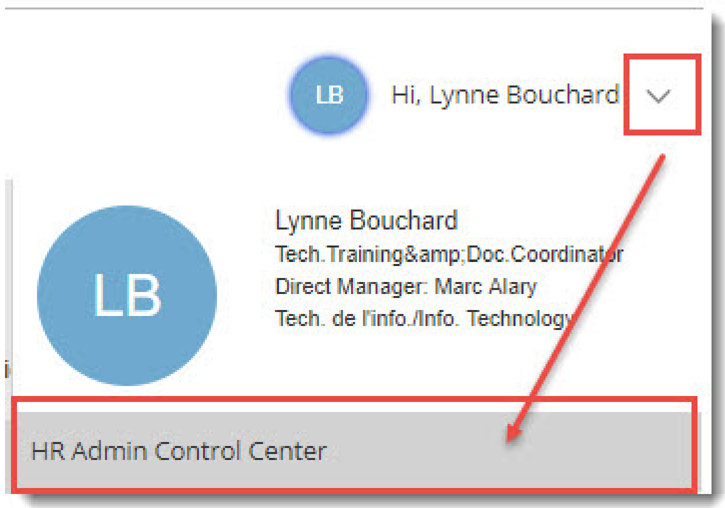
The HR Administrators can produce statistical reports using the Halogen Report Center. The Report Center is the best way for them to ensure that the employees/ supervisors of heir unit begin and complete the processes during the expected periods. The HR Administrators have access to all reports of the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

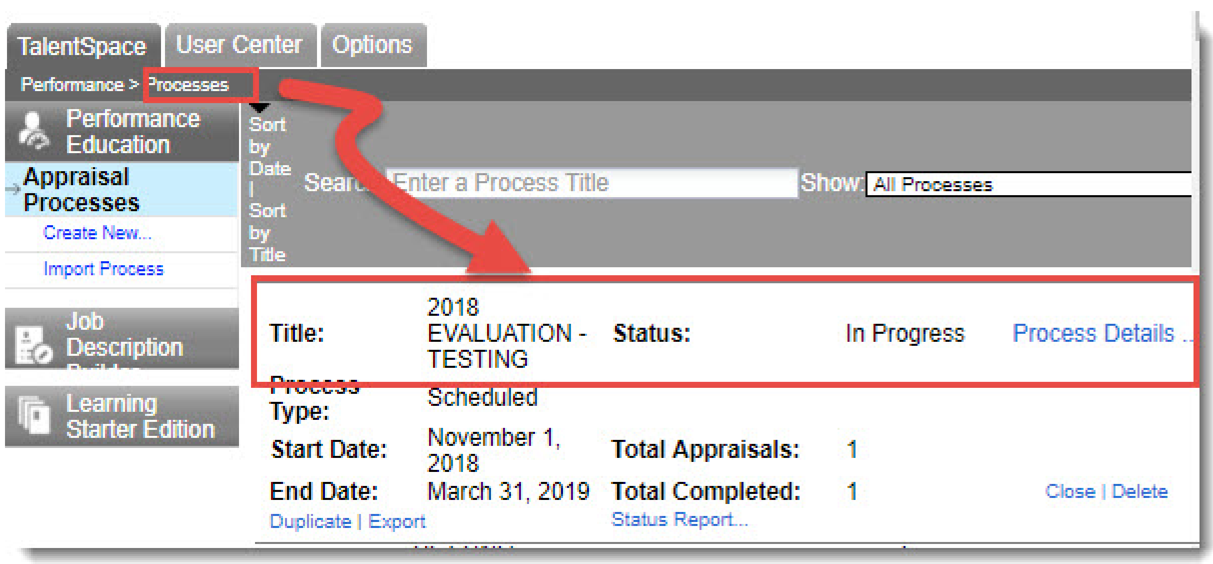
The Detailed Status

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.

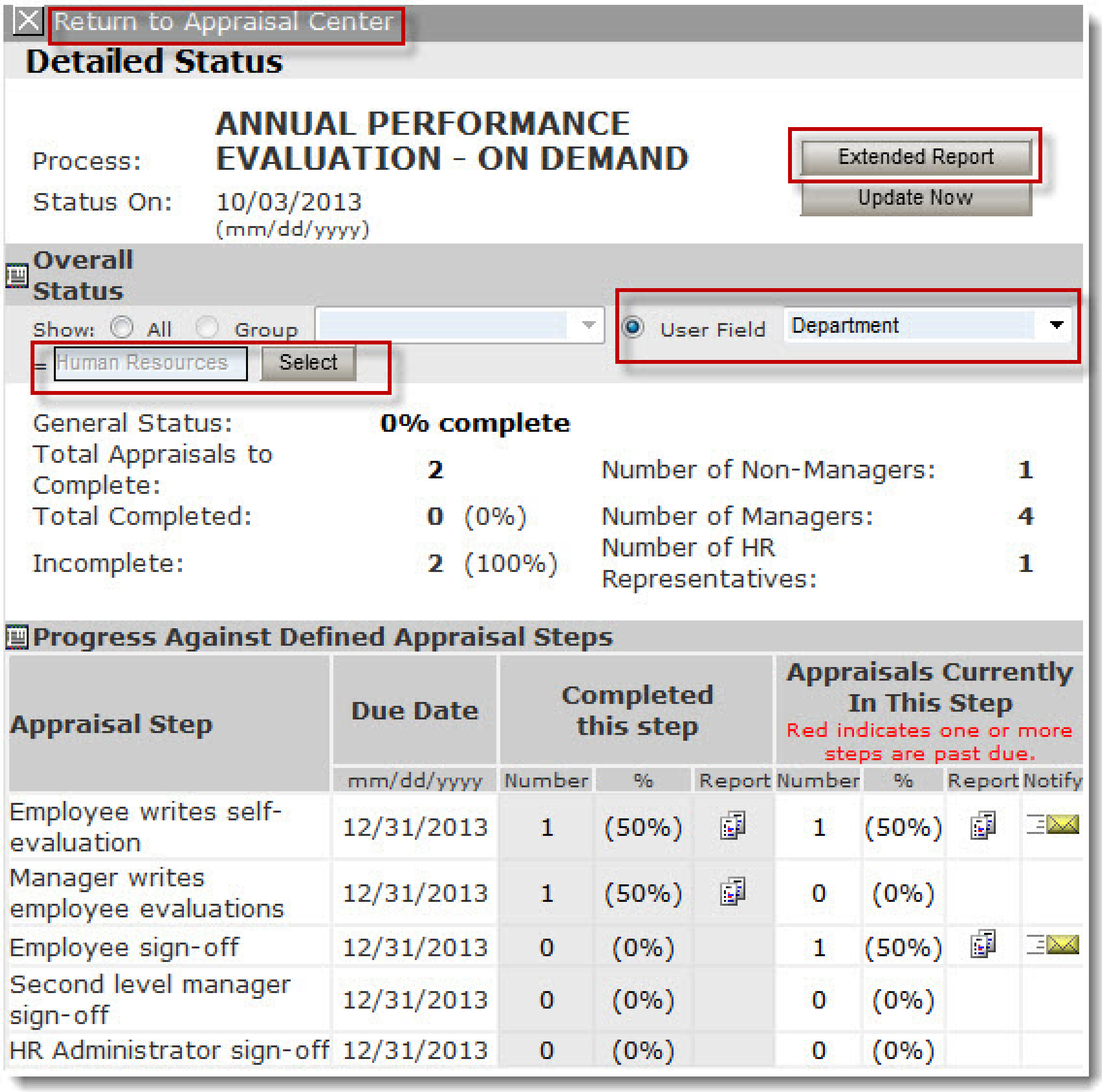


2. Select the process by clicking on Process Details.



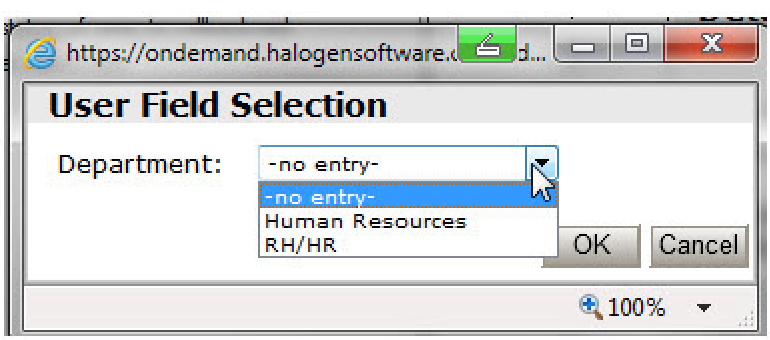
3. Click on Detailed Status.

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.



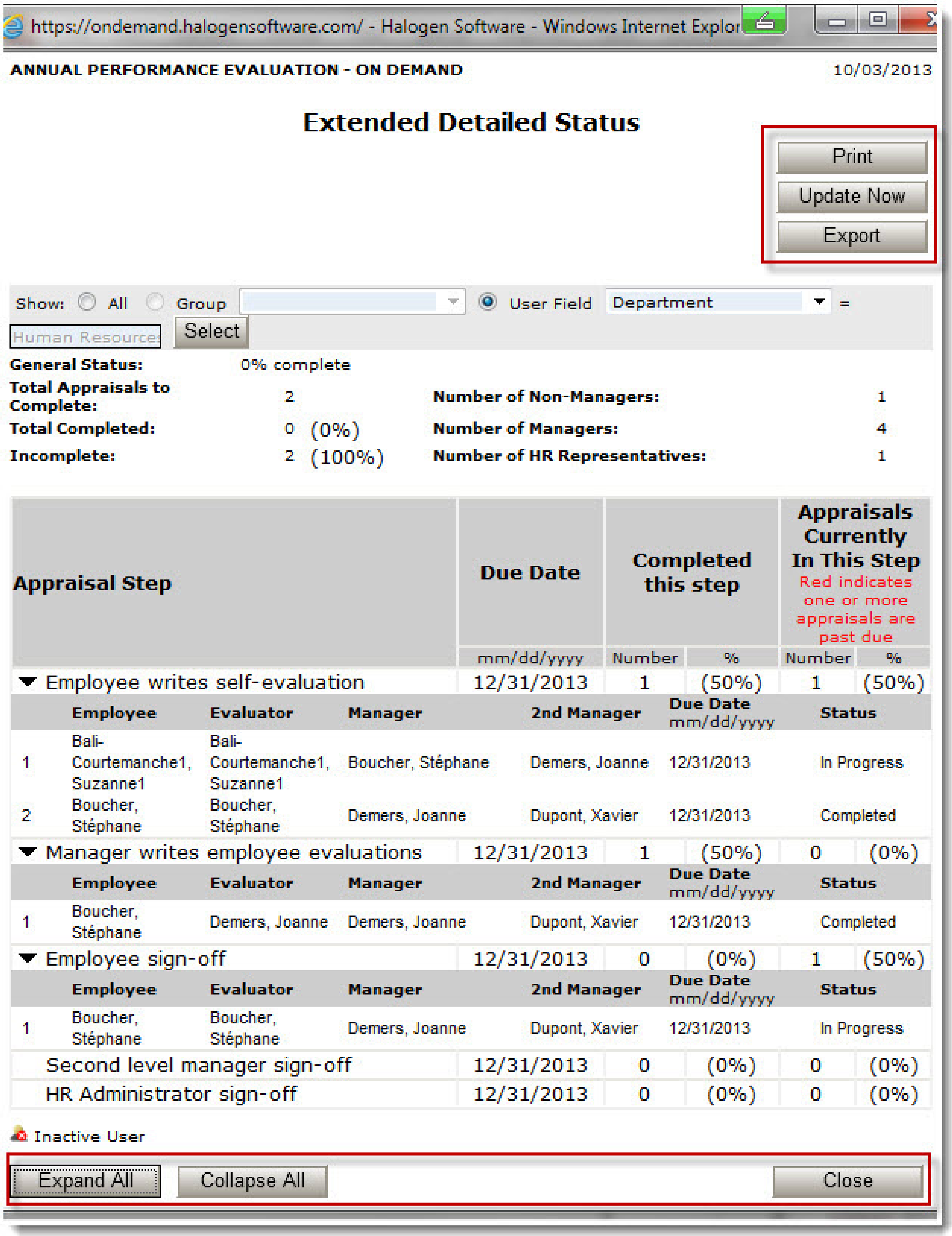
a. (Optional) Click Select to select the report parameters to filter your data.

b. (Optional) Select the value of the selected field.



5. Click on Extended Report 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.



Appraisal Step	Due Date mm/dd/yyyy	Completed this step Number	Completed this step %	Appraisals Currently In This Step (Red indicates one or more appraisals are past due) Number	Appraisals Currently In This Step %
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%)

Employee writes self-evaluation:

	Employee	Evaluator	Manager	2nd Manager	Due Date mm/dd/yyyy	Status
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:

	Employee	Evaluator	Manager	2nd Manager	Due Date mm/dd/yyyy	Status
1	Boucher, Stéphane	Demers, Joanne	Demers, Joanne	Dupont, Xavier	12/31/2013	Completed

Employee sign-off:

	Employee	Evaluator	Manager	2nd Manager	Due Date mm/dd/yyyy	Status
1	Boucher, Stéphane	Boucher, Stéphane	Demers, Joanne	Dupont, Xavier	12/31/2013	In Progress

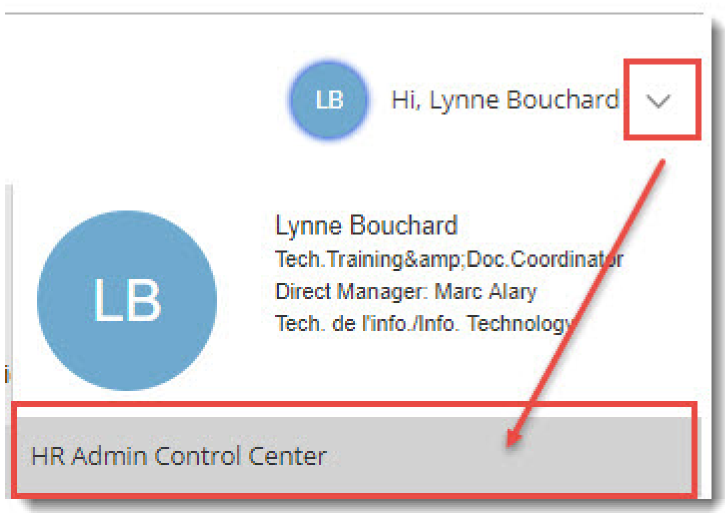
a. Click Collapse All to remove the employee names.

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.

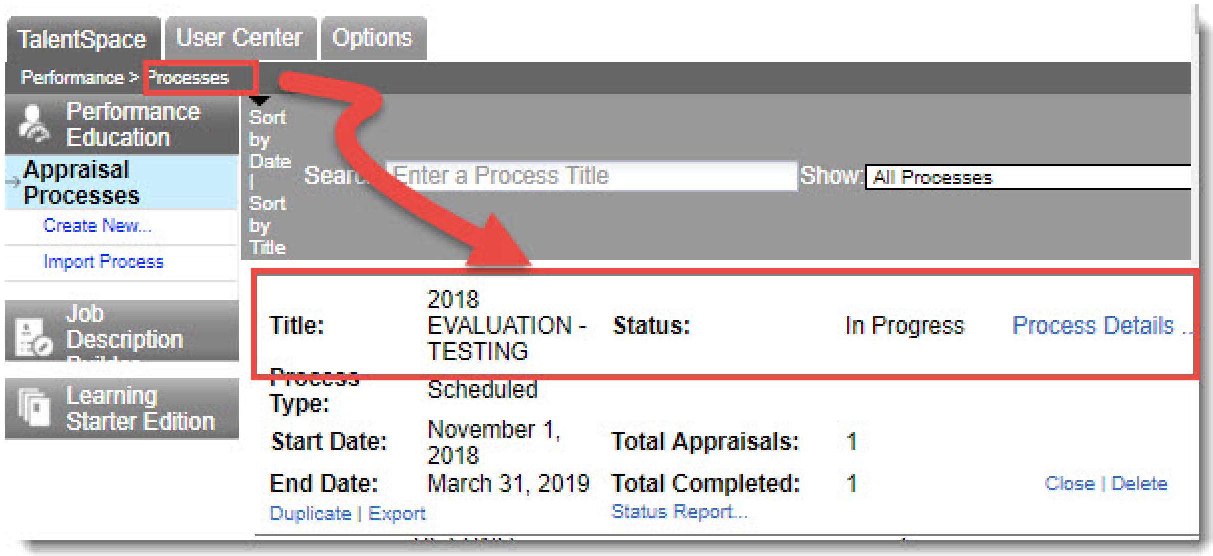
The Group Scores report

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.

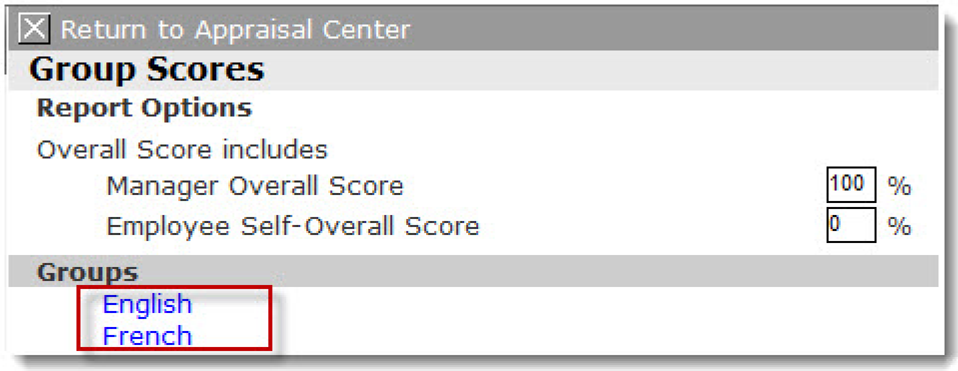


2. Select the process by clicking on Process Details.

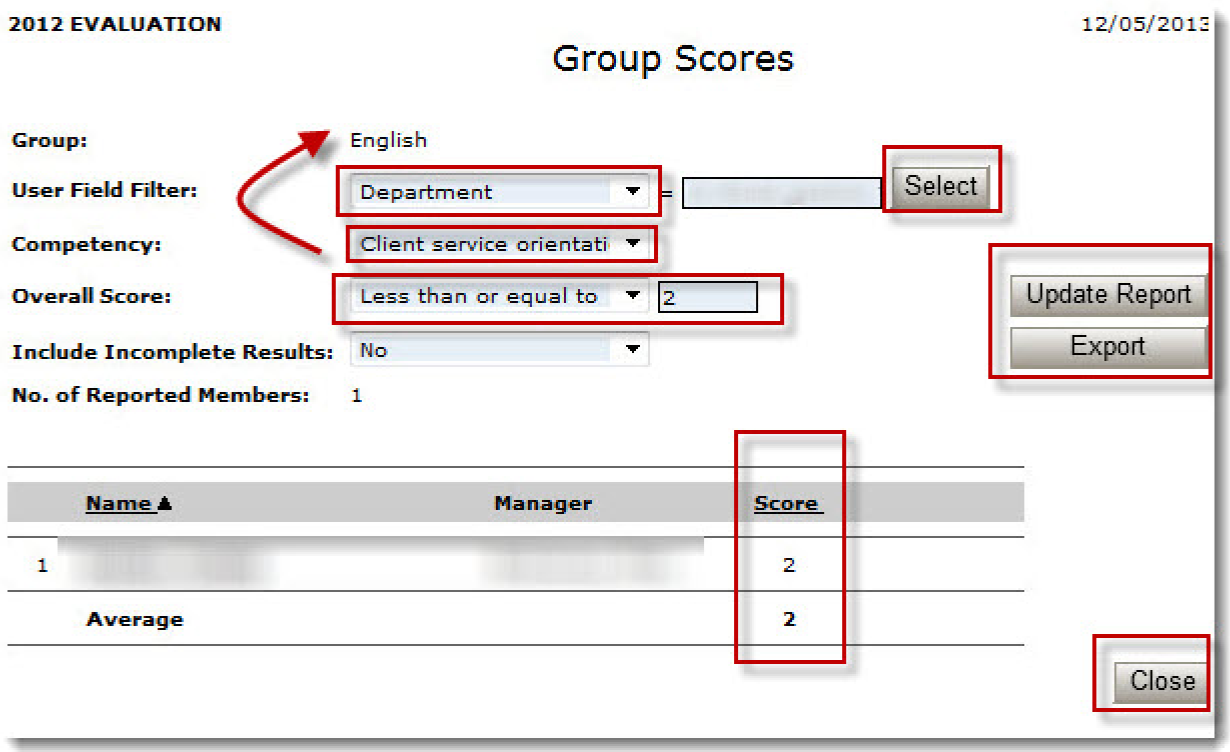


3. Click Group Scores.

4. Select English or 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.

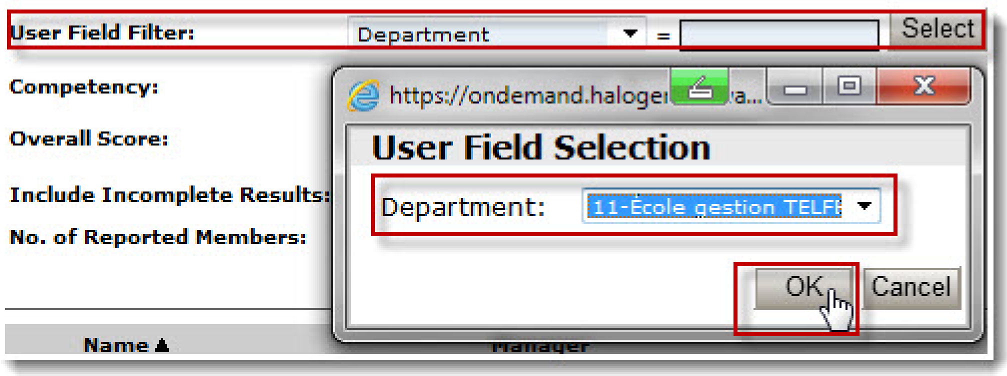


5. (Optional) Click User Field Filter and select the user field to output a group of employees. For example, select department if you need the information for a specific department.

   a. Click Select to obtain a list of values (for example, list of departments if you have selected department at the previous step.

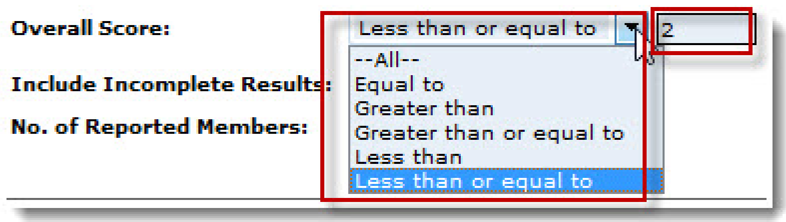
   b. Select the value (for example the department name).

   c. Click OK.

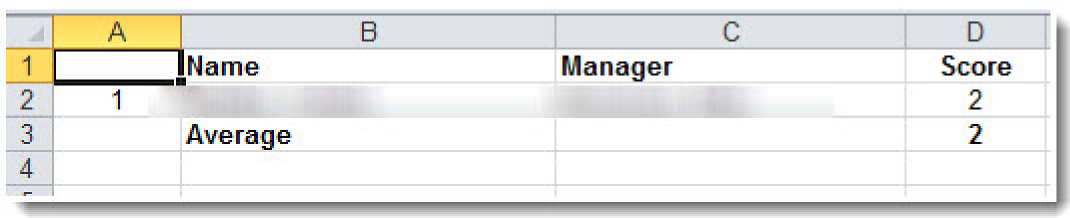


6. Select the competency.
   If you have selected English to verify the competency score of employees that have filled the English Form, please ensure to select the competency written in English otherwise you will obtain no results.

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



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

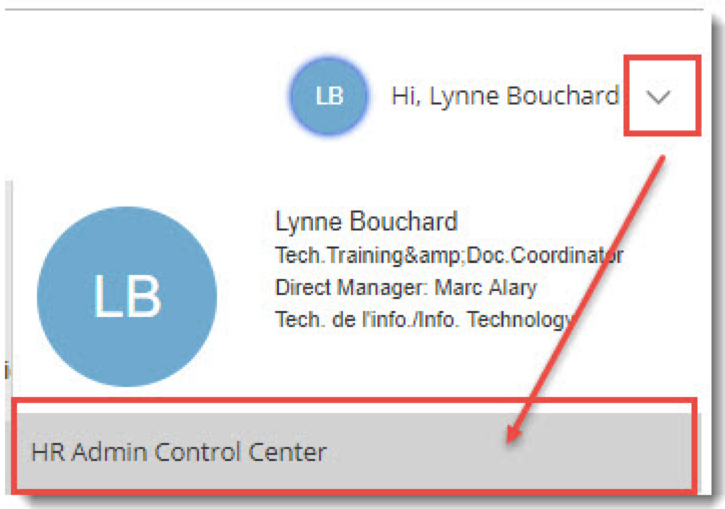


10. Click on Return to Appraisal Center.

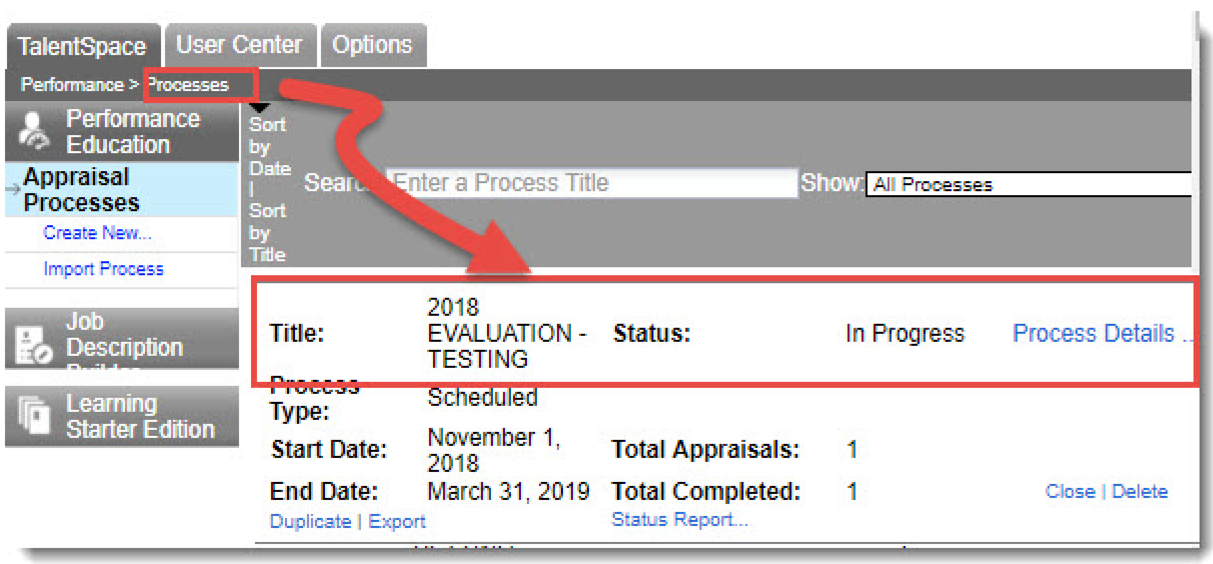
The Competency Rating

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.

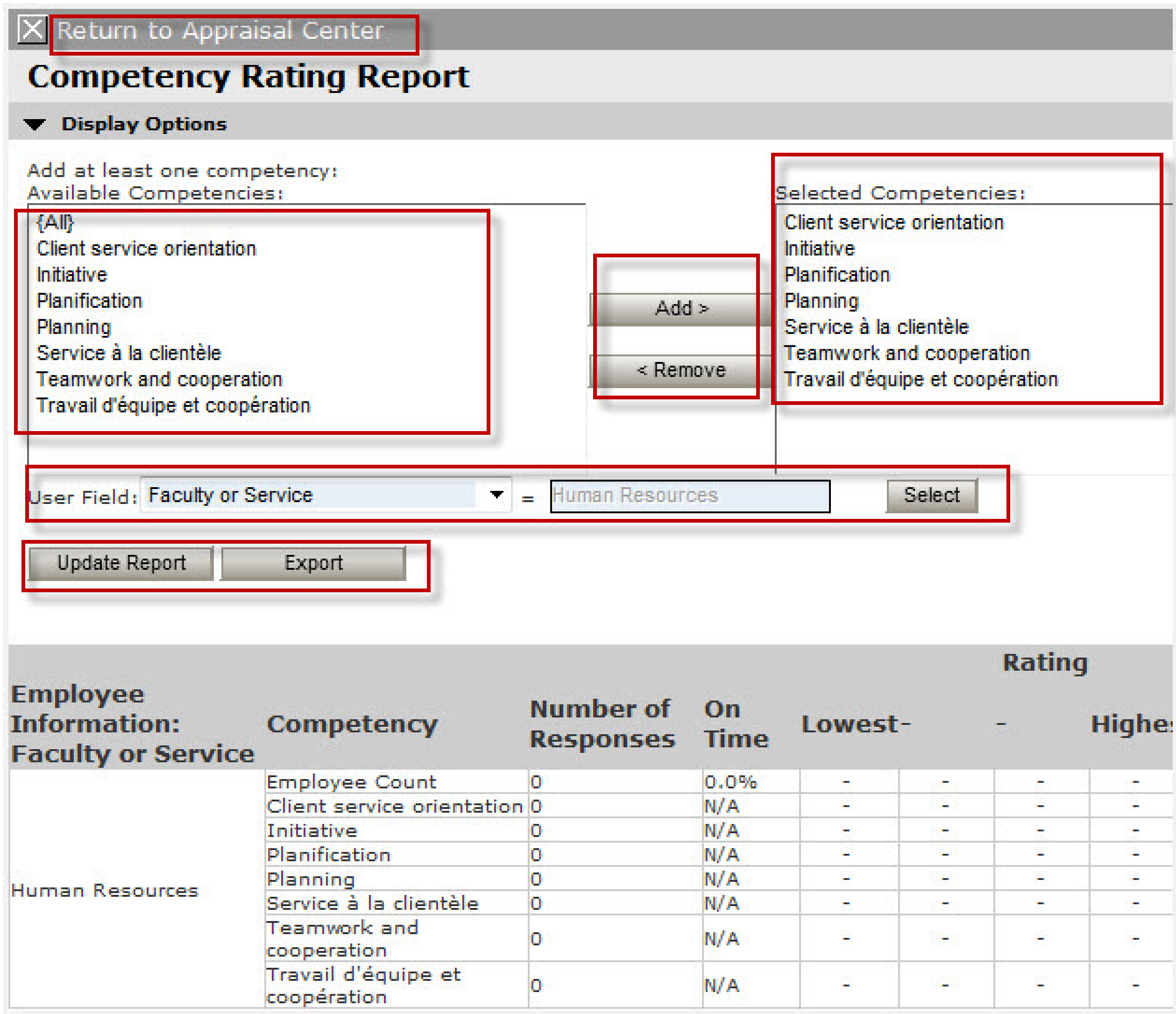


2. Select the process by clicking on Process Details.



3. Click Competency Rating.

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

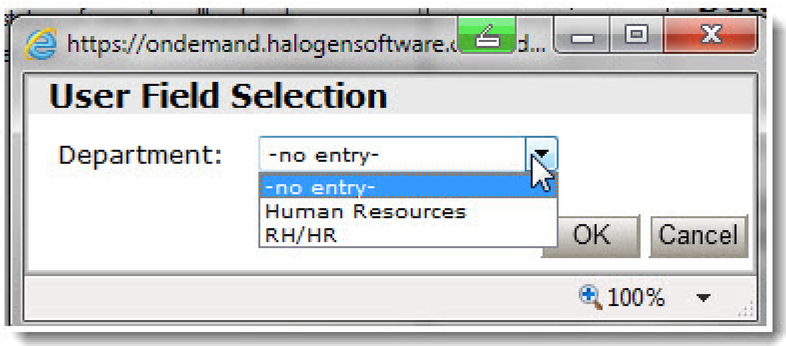


To select more than one competency at the same time, press on the SHIFT key of the keyboard and click on the other competencies.

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.

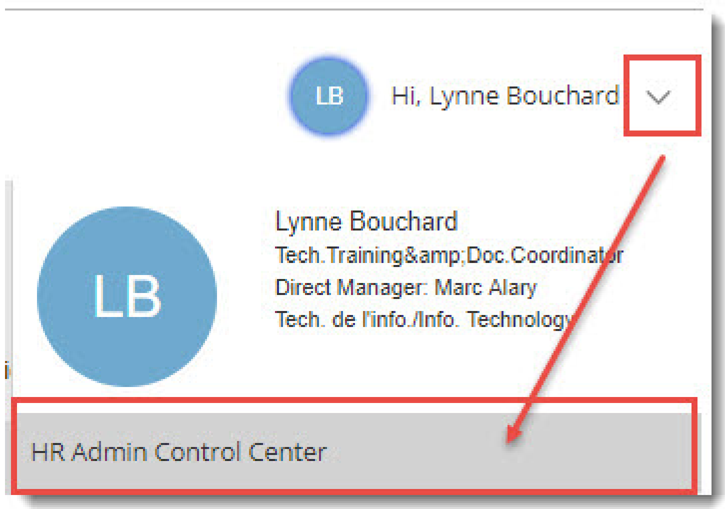


    c. (Optional) Click OK.
7. Click on Update Report.
8. Click on Export to export the report to Excel.
9. Click on Return to Appraisal Center.

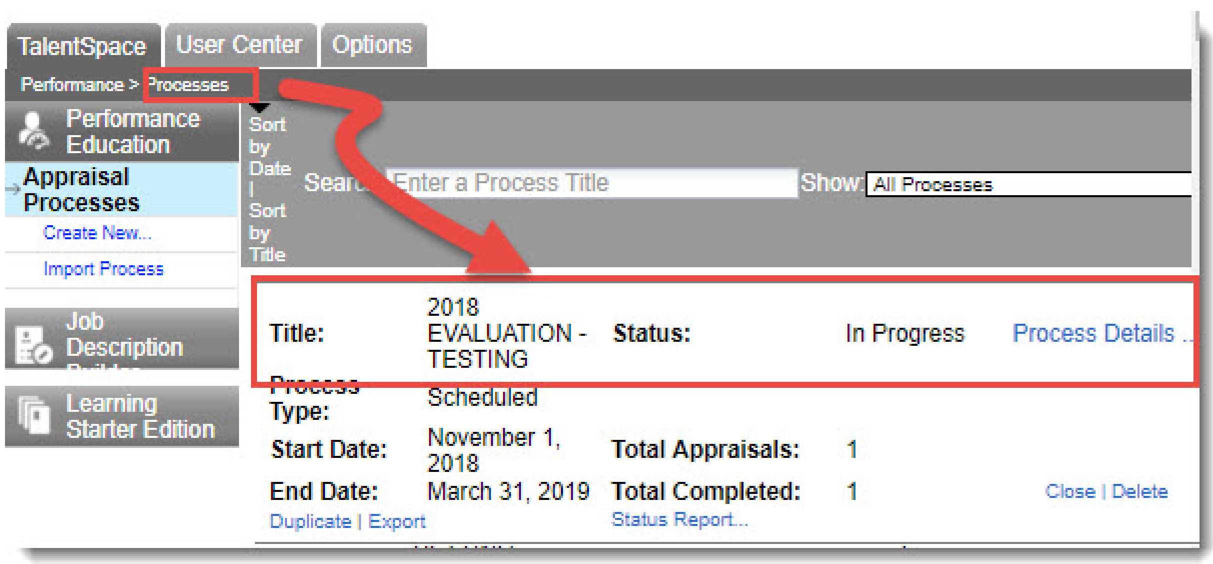
The On Time report

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.

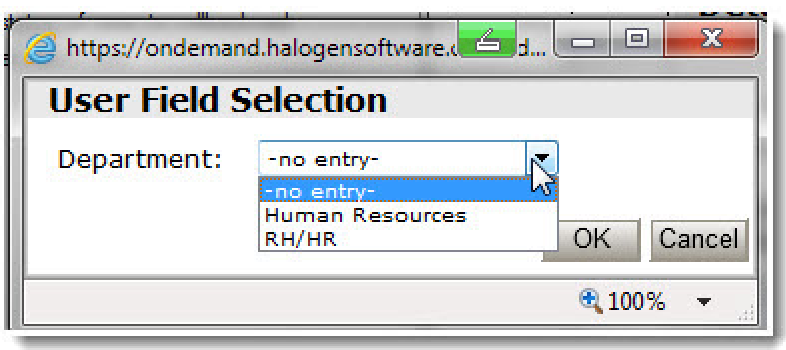


3. Click On Time Reports.

4. (Optional) Select a field to filter your report using the User Field scroll list of the Overall Status section.

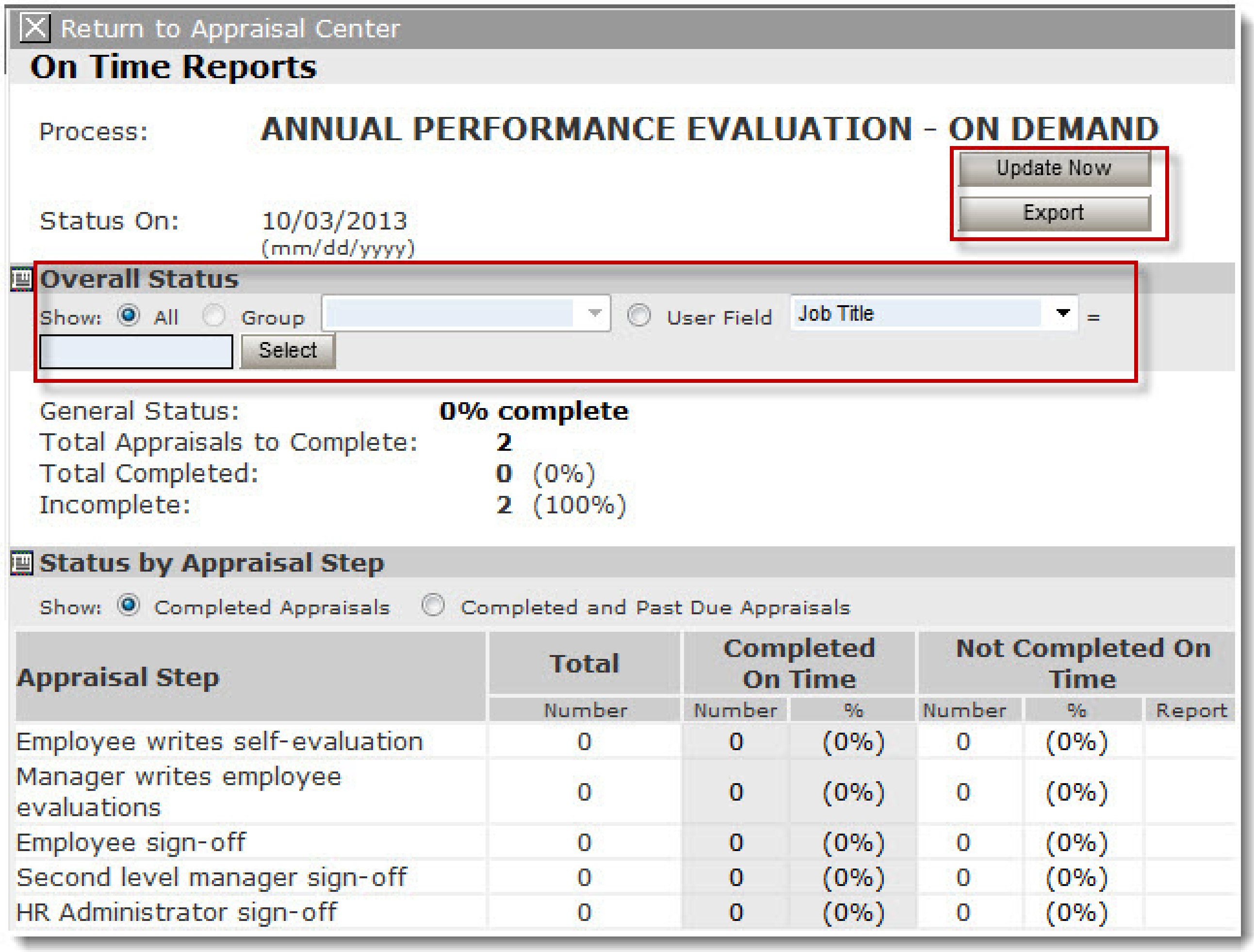
   a. (Optional) Click on Select to select the report parameters to filter the report.

   b. (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.



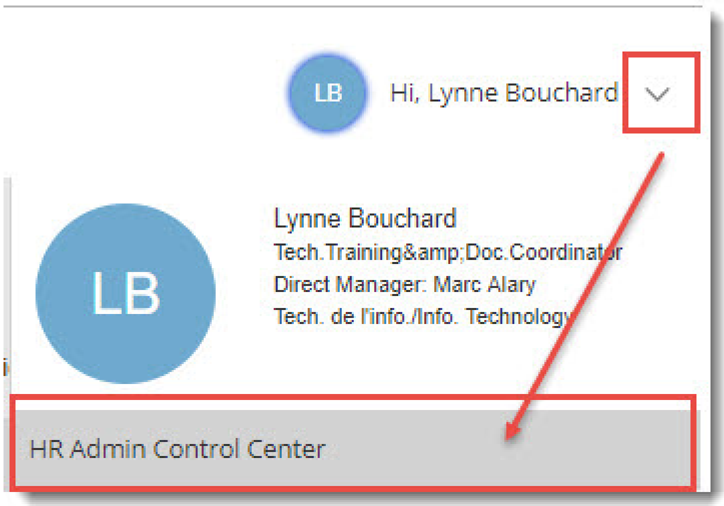
Appraisal Step	Total	Completed On Time		Not Completed On Time		
	Number	Number	%	Number	%	Report
Employee writes self-evaluation	0	0	(0%)	0	(0%)	
Manager writes employee evaluations	0	0	(0%)	0	(0%)	
Employee sign-off	0	0	(0%)	0	(0%)	
Second level manager sign-off	0	0	(0%)	0	(0%)	
HR Administrator sign-off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

6. Click Export to export the report to Excel.
7. Click Return to Appraisal Center.

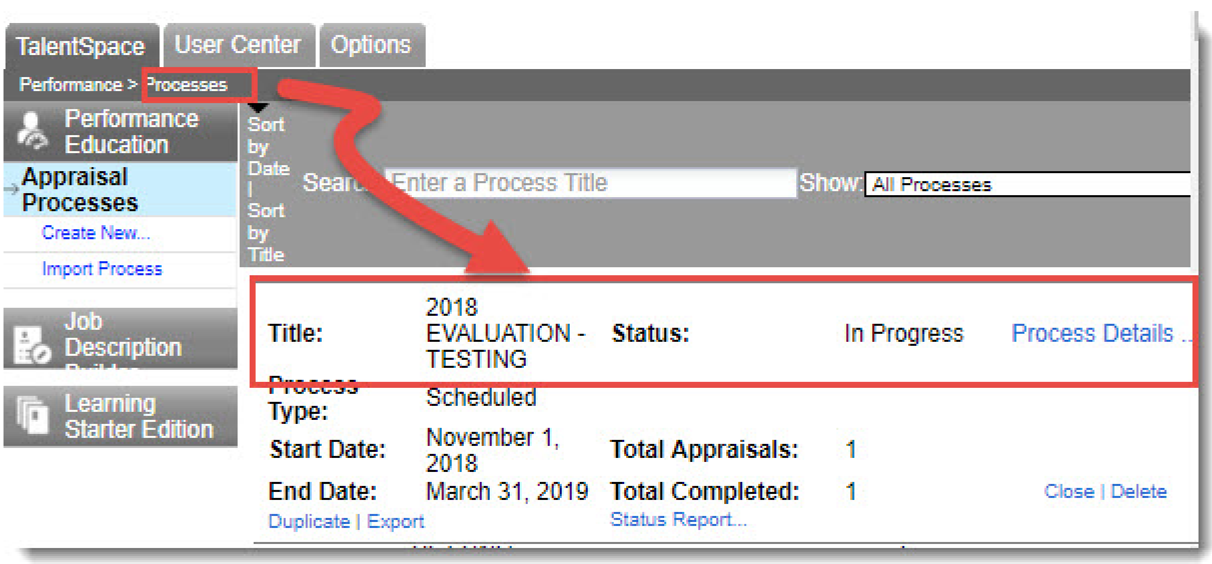
The Development Plan Report

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.

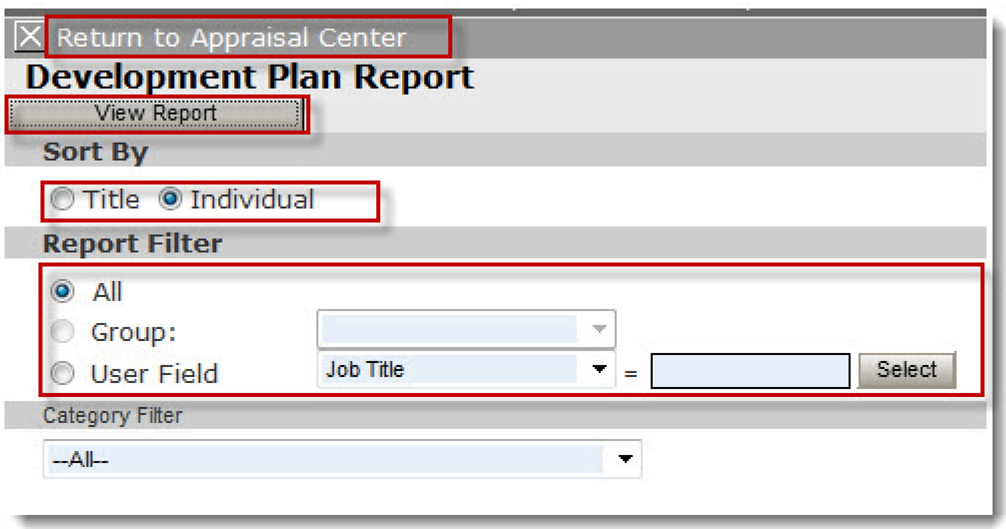


2. Select the process by clicking on Process Details.



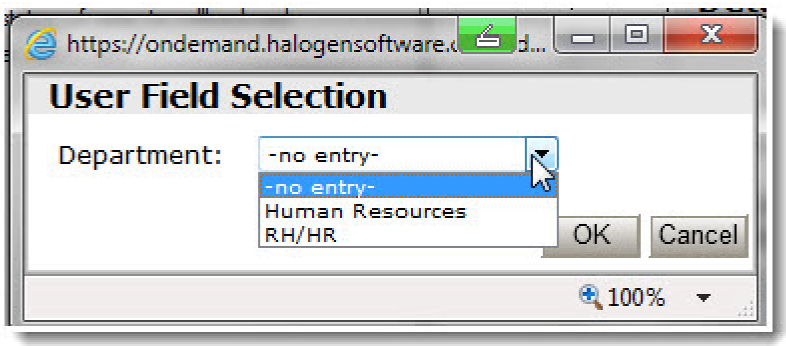
3. Click Development Plan.

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



- 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.

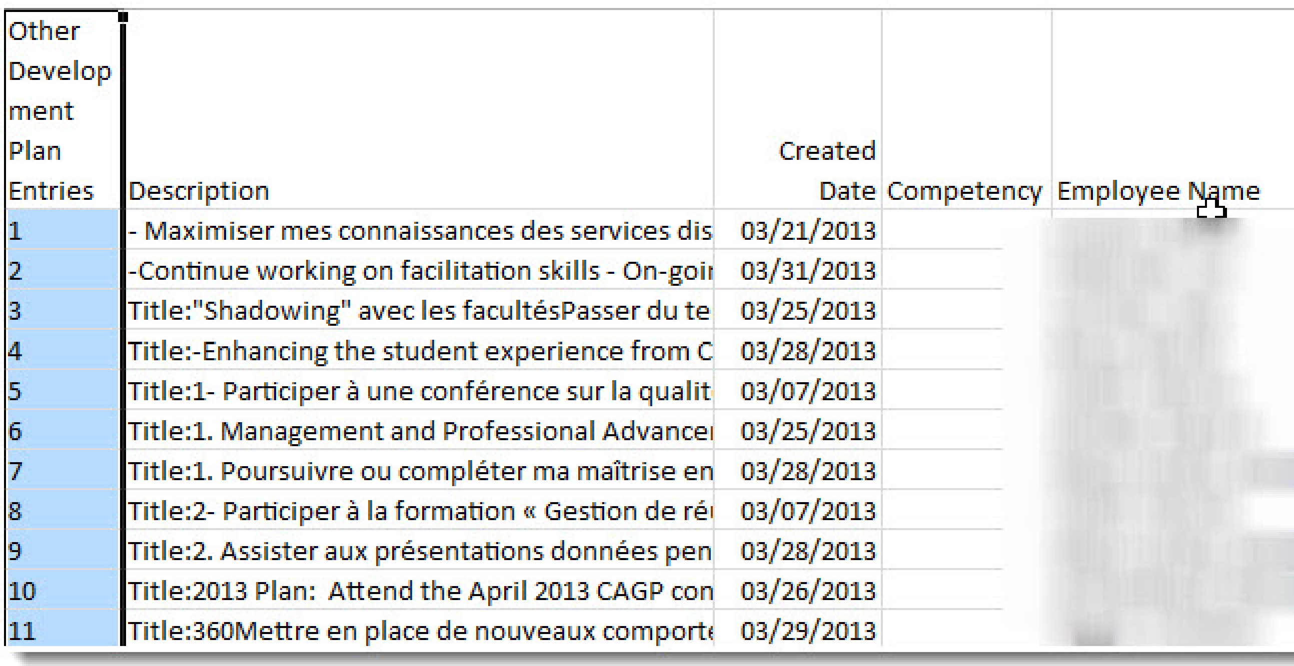
7. Click on one of the following options:
   - Export to export the report in Excel
   - Close to close the report

Close Export

ANNUAL PERFORMANCE EVALUATION - ON DEMAND 10/04/2013

Development Plan

No records found



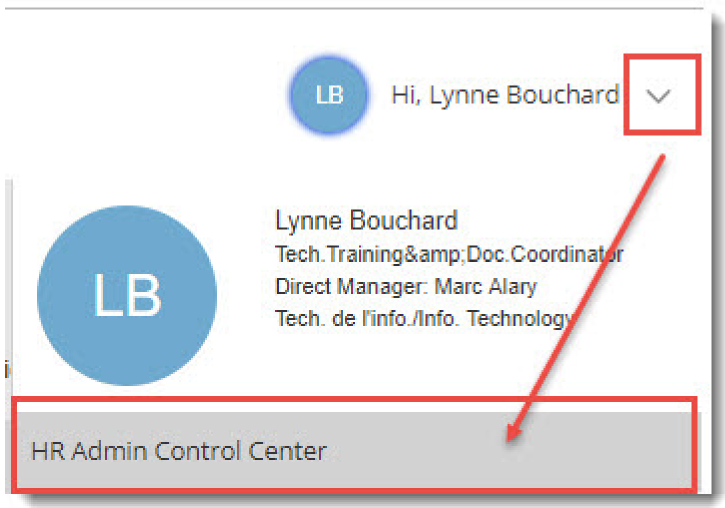
Other Development Plan Entries	Description	Created Date	Competency	Employee Name
1	- Maximiser mes connaissances des services dis	03/21/2013		
2	-Continue working on facilitation skills - On-goi	03/31/2013		
3	Title:"Shadowing" avec les facultésPasser du te	03/25/2013		
4	Title:-Enhancing the student 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 comport	03/29/2013		

8. Click Return to Appraisal Center.

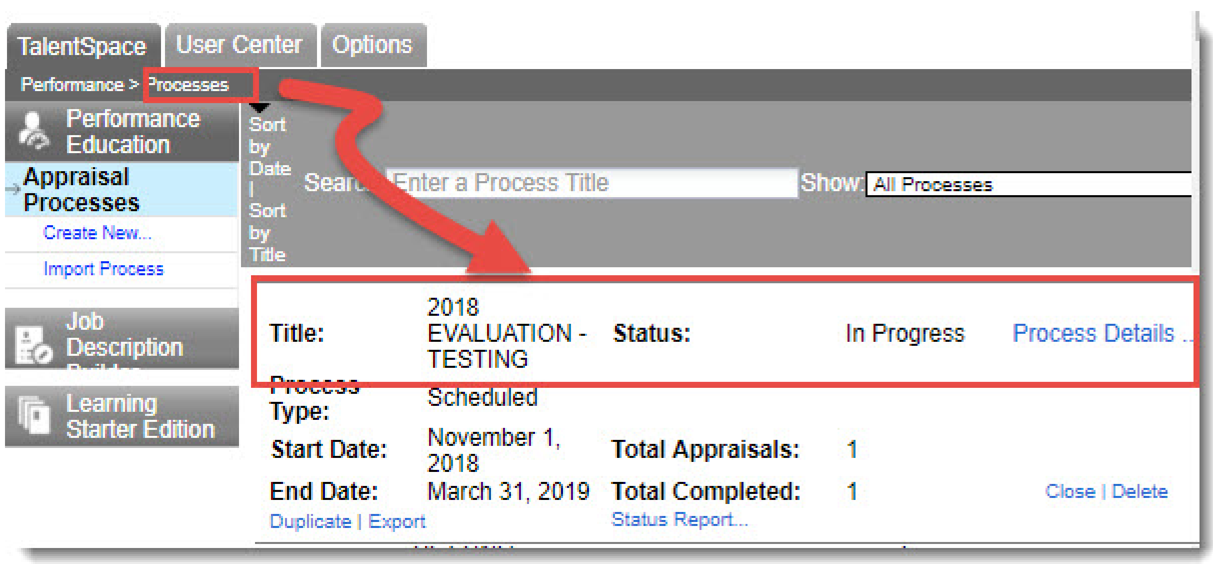
The Goals report

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

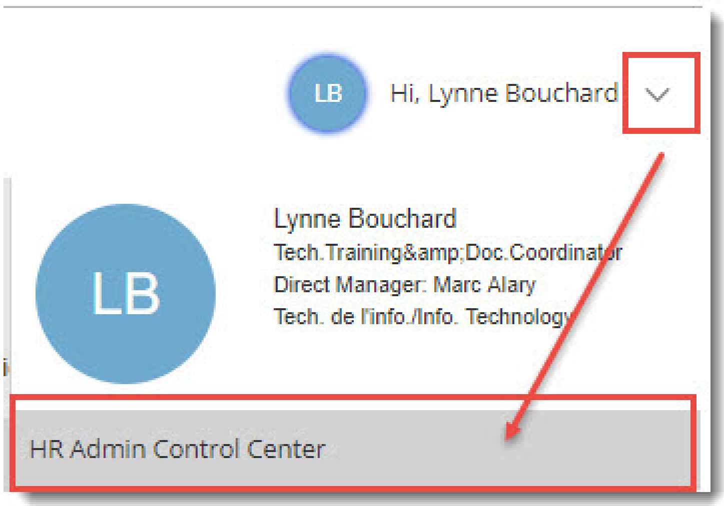
Employee Name (Supervisor Name)	Goal	Status	Flag	Percent Complete
	Stratégies et outils de communication	In Progress		50%
	2) Trouver trois nouvelles initiatives de recrutement et les mettre en place pour le cycle 2014	En cours		100%
	Communiquer avec la gestionnaire des opérations pour informer de la 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.

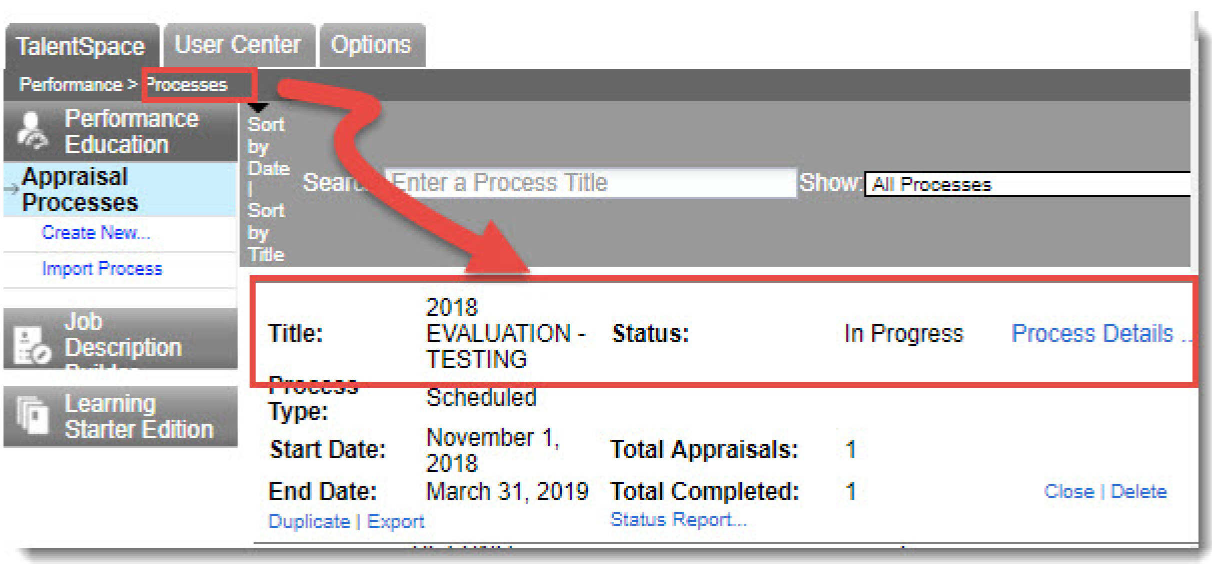
Export Response report

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.

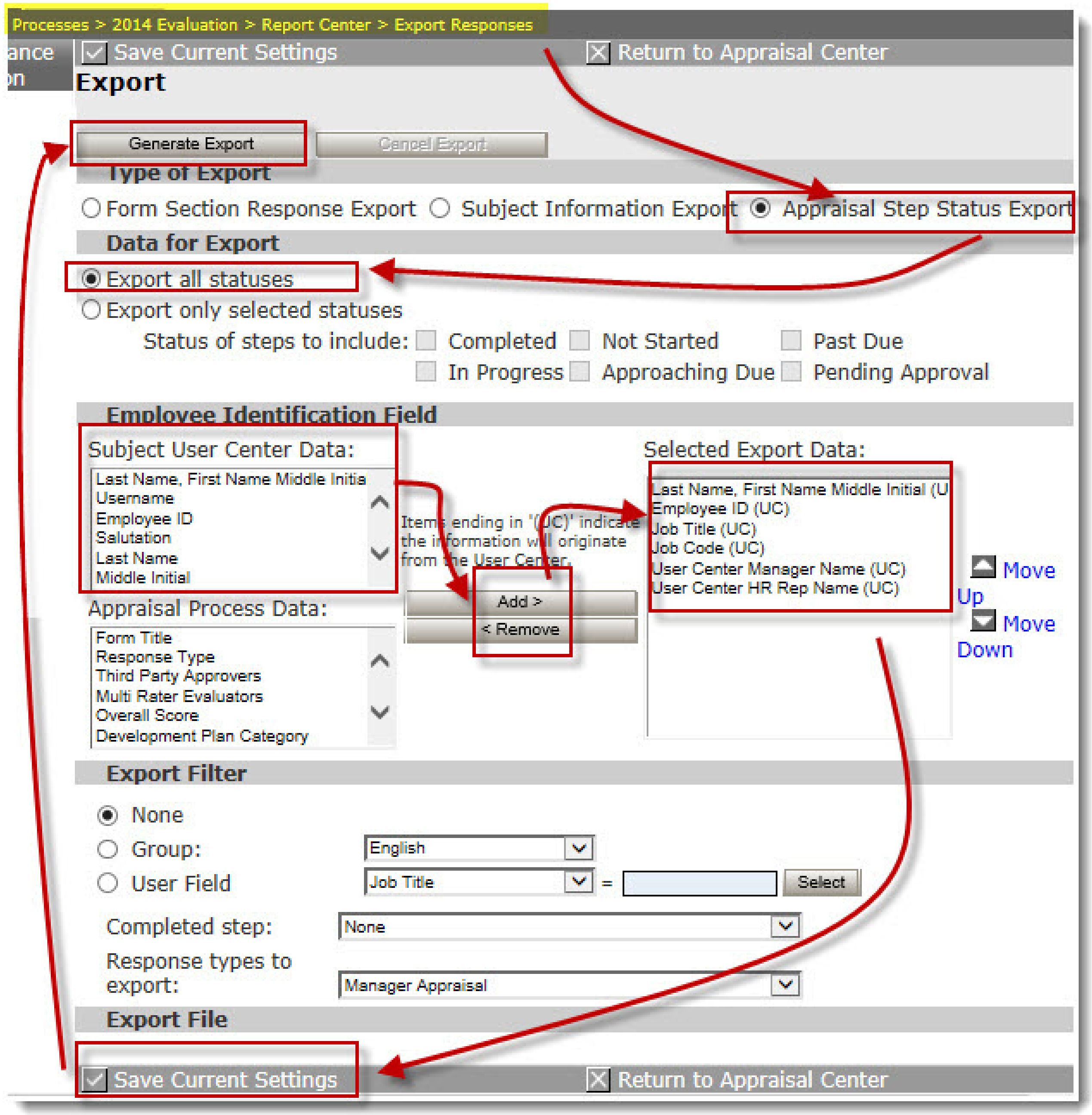


2. Select the process by clicking on Process Details.



3. Click Export Responses.

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

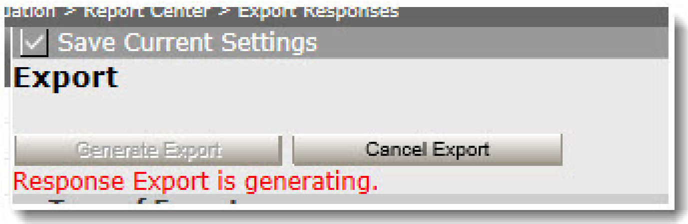


5. Hold down the CTRL key while clicking on each variable (column) you want to appear in the report.

   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.



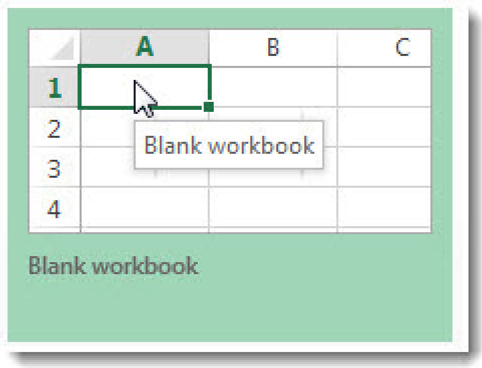
9. Click OK when The export has completed message appears.
10. Click Export Results in the Export File section.
11. Click Save and then Save As.
12. Select the directory where you want to save the file.
13. (Optional) Enter a report name in the File Name.
14. Click Save.

Excel and reports created as text (.txt) files

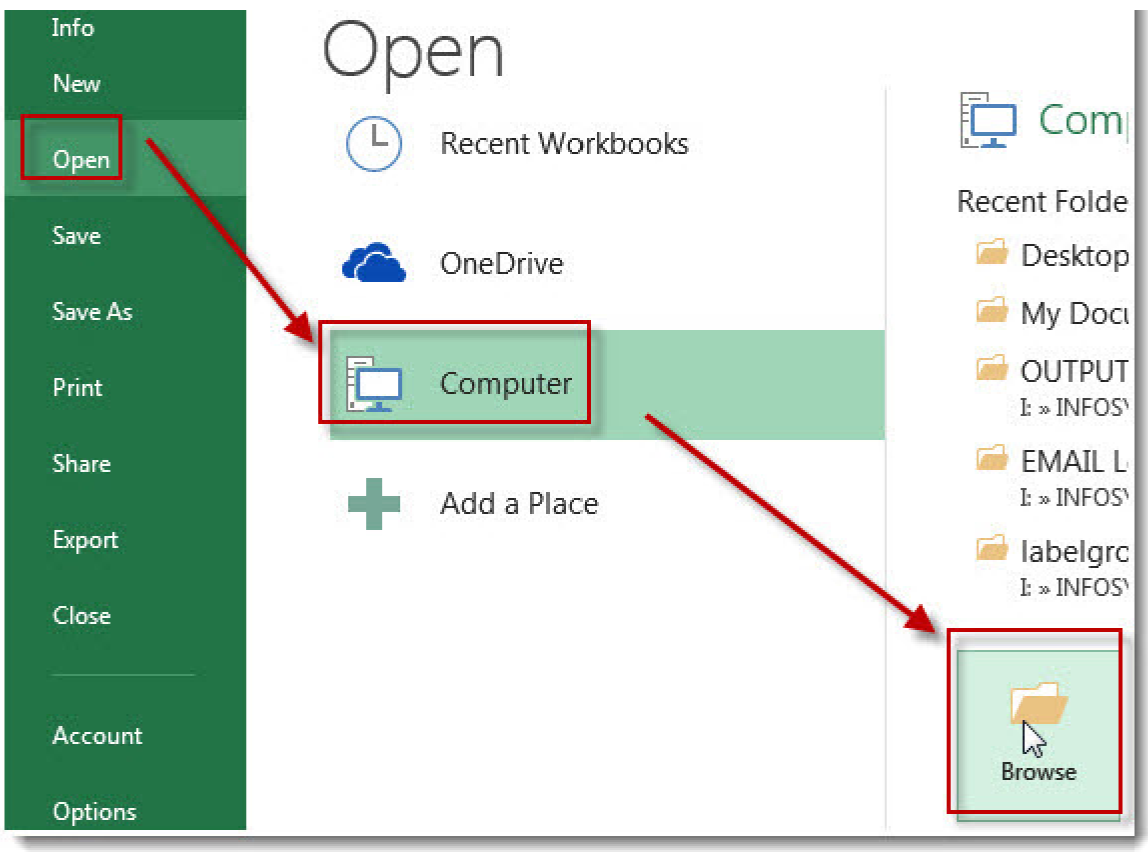
Halogen allows you to create reports in text format (.txt) that can then be opened by Excel. Follow these steps to open the file created by Halogen.

1. Click on the Excel icon.

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

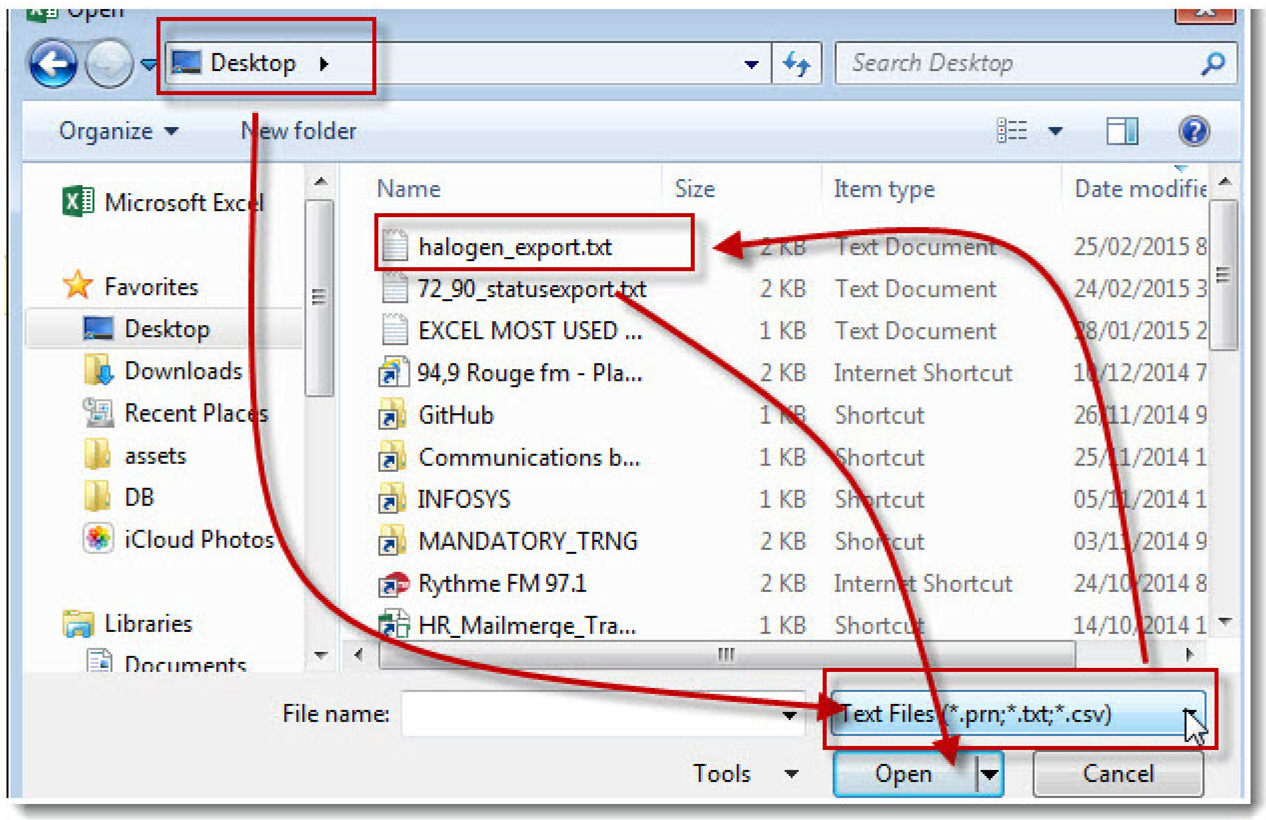


3. Click Open.



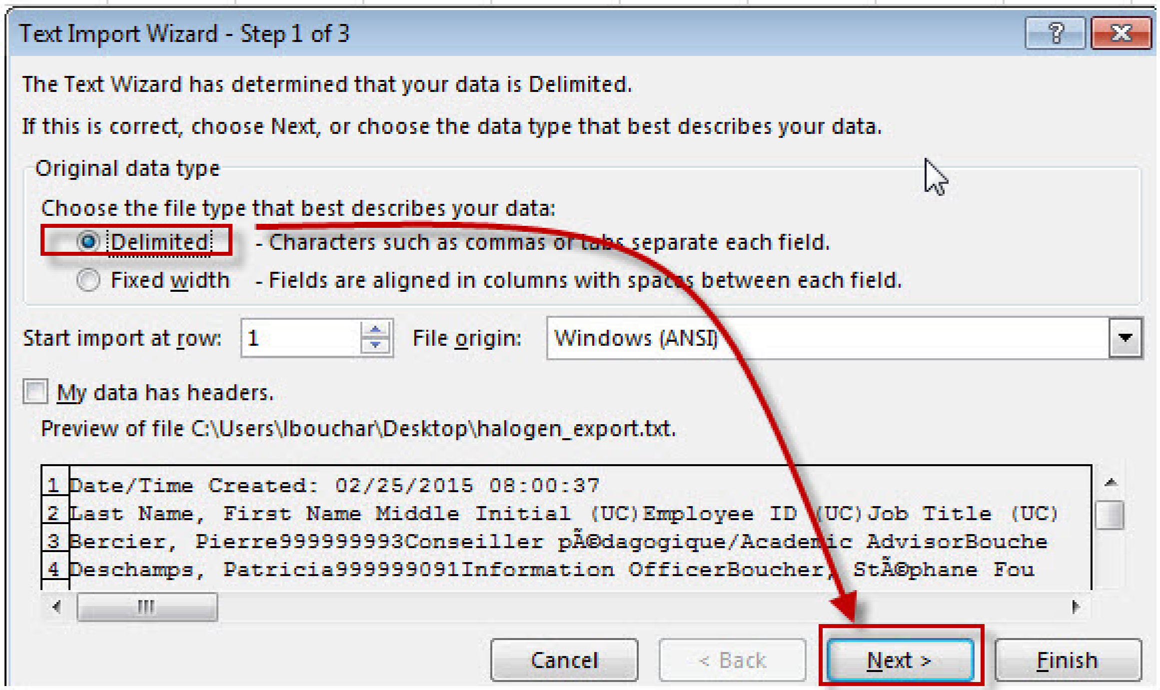
4. Click Computer.

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

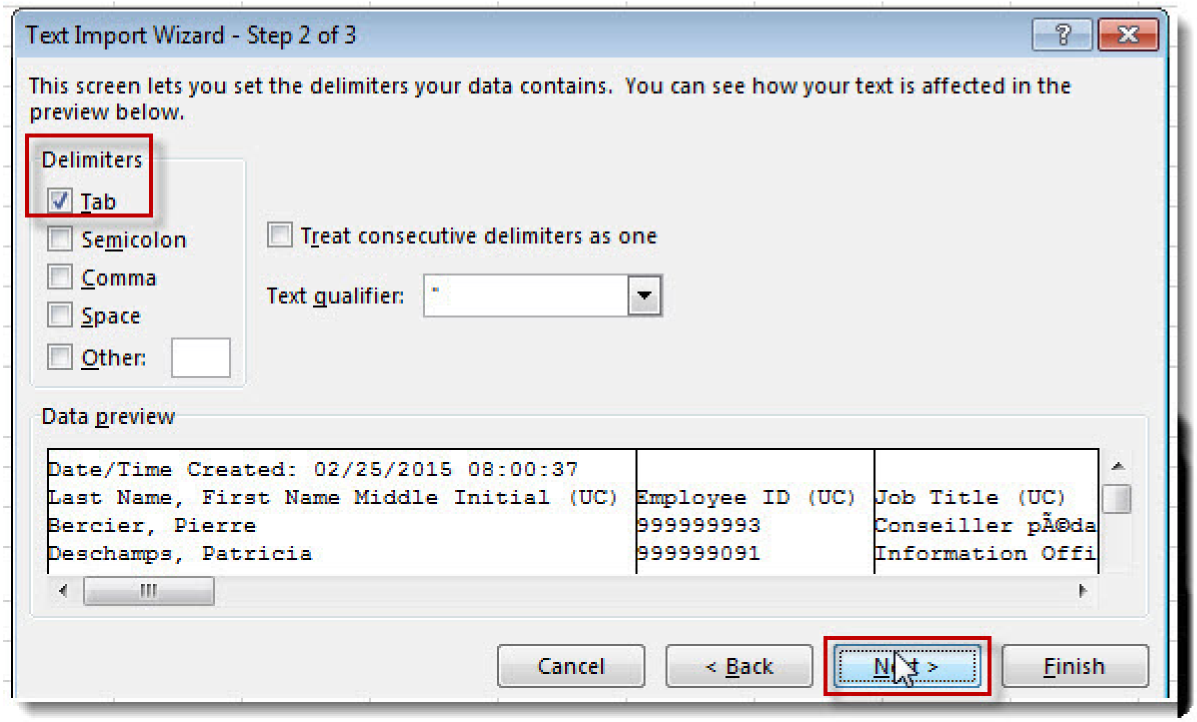


7. Select Text Files (*.prn, *.txt, *.csv) from the dropdown list of file formats.
8. Select the document created by Halogen that you want to open in Excel.
9. Click Open.

10. Click Next.



11. Click Next.



12. Click Finish.

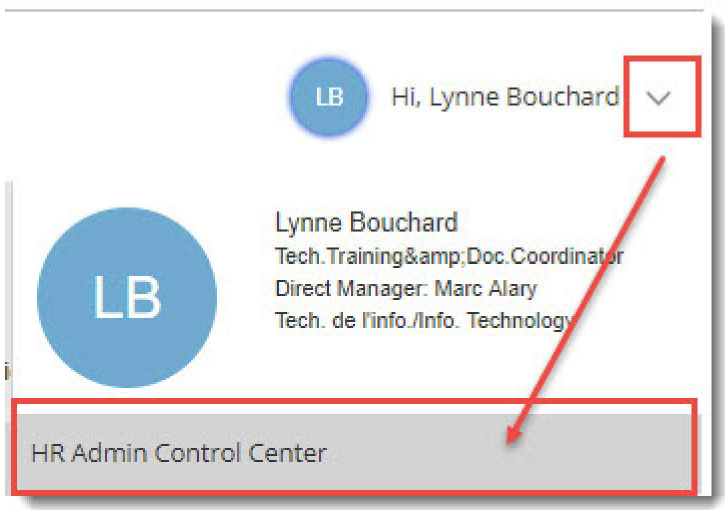
13. Save the report as an Excel file.

User Activation / Deactivation

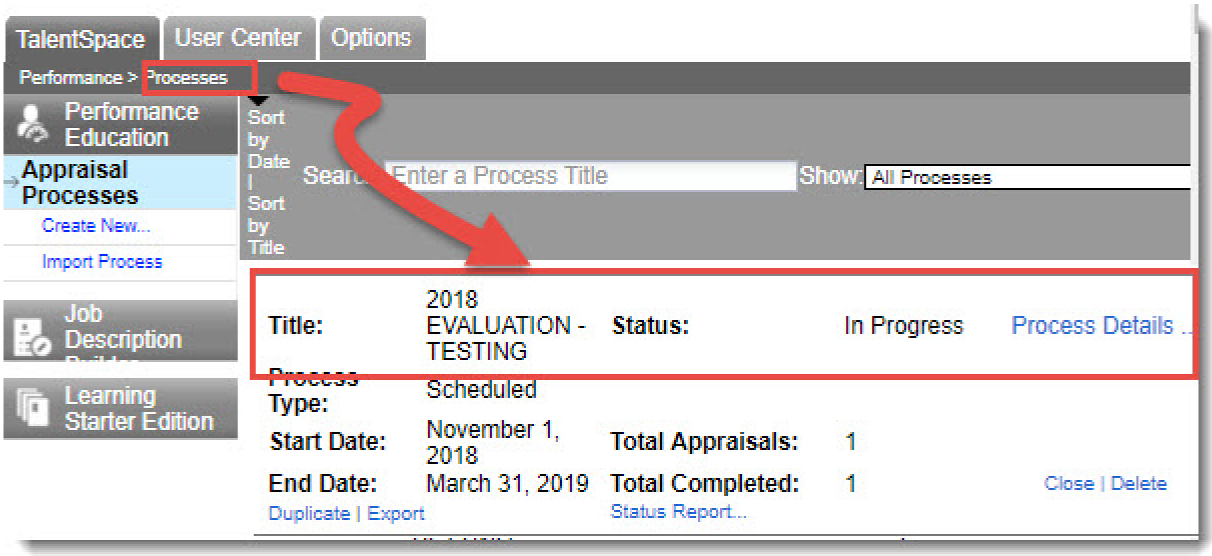
User Activation and Deactivation

Opening the *HR Admin Control Center*

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



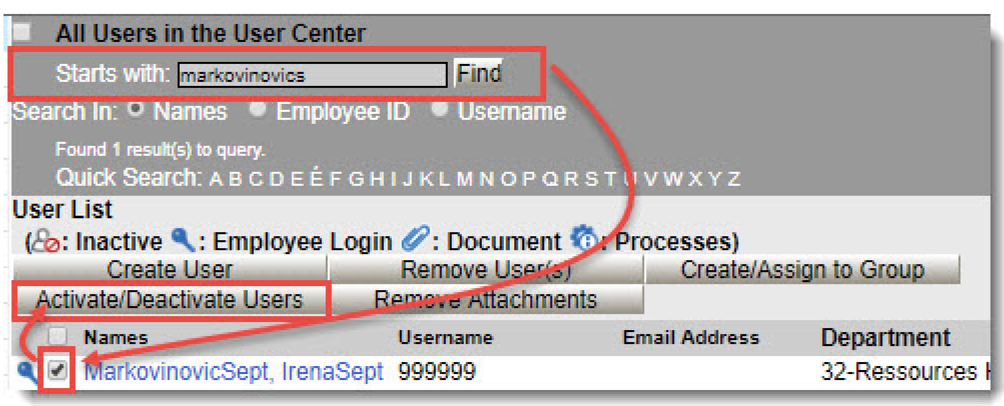
2. Select the process by clicking on Process Details.



User Deactivation / User Activation

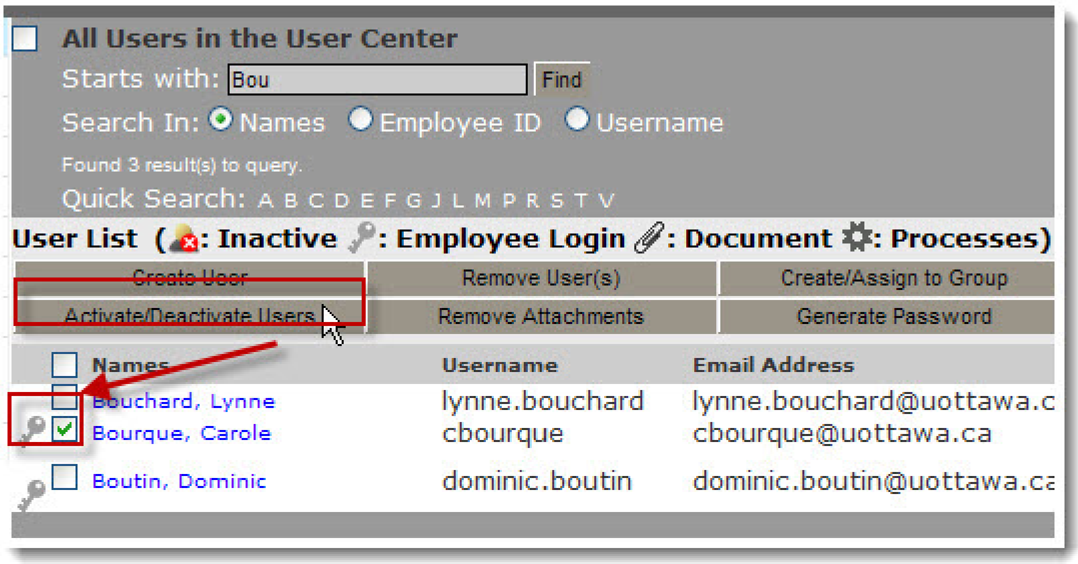
It is necessary to deactivate a user if he/she leaves the University. The user that terminates his employement and comes back will have his/her account reactivated. The steps to activate a user are the same to deactivate a user.

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.

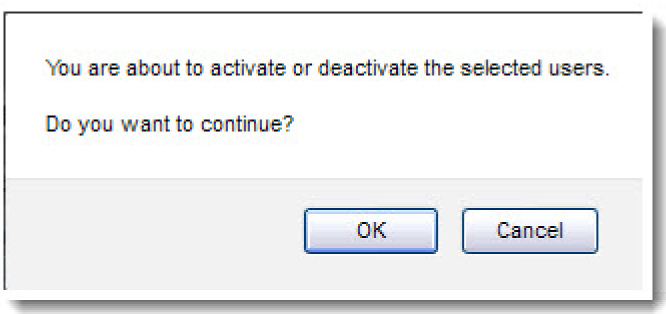


2. Click Find.

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



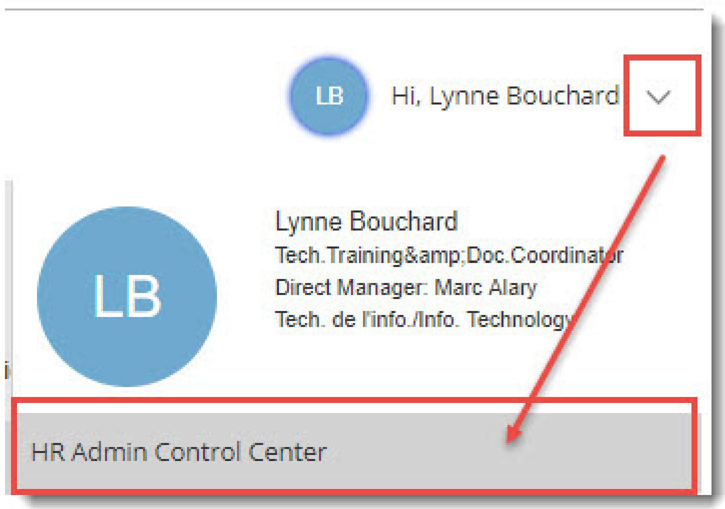
5. Click Ok to confirm the deactivation/activation of the user.



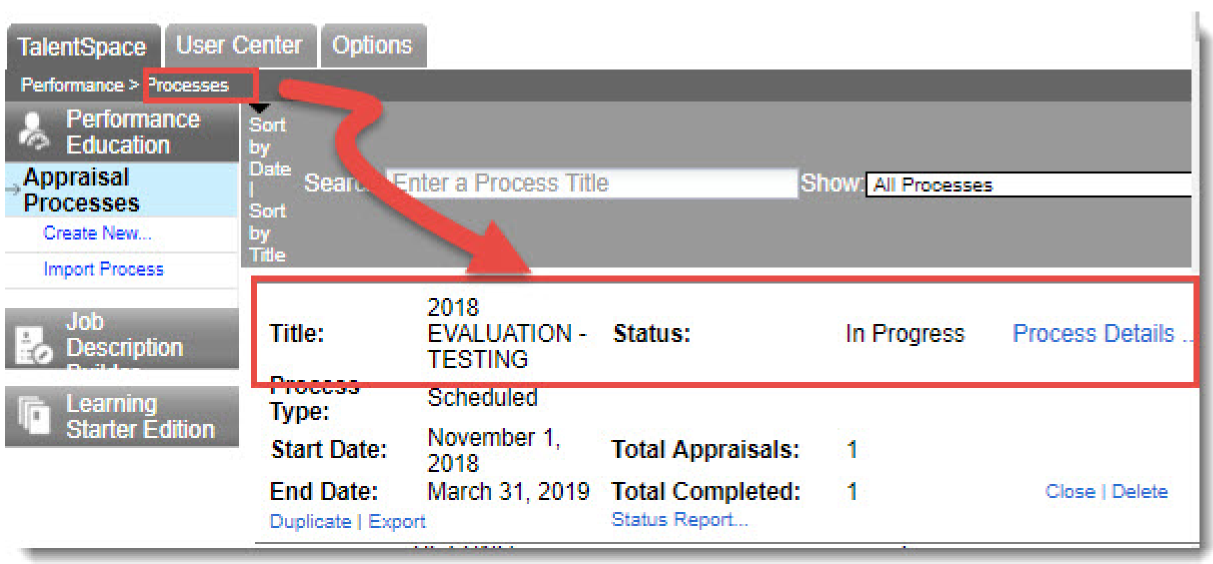
User Creation

Opening the *HR Admin Control Center*

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



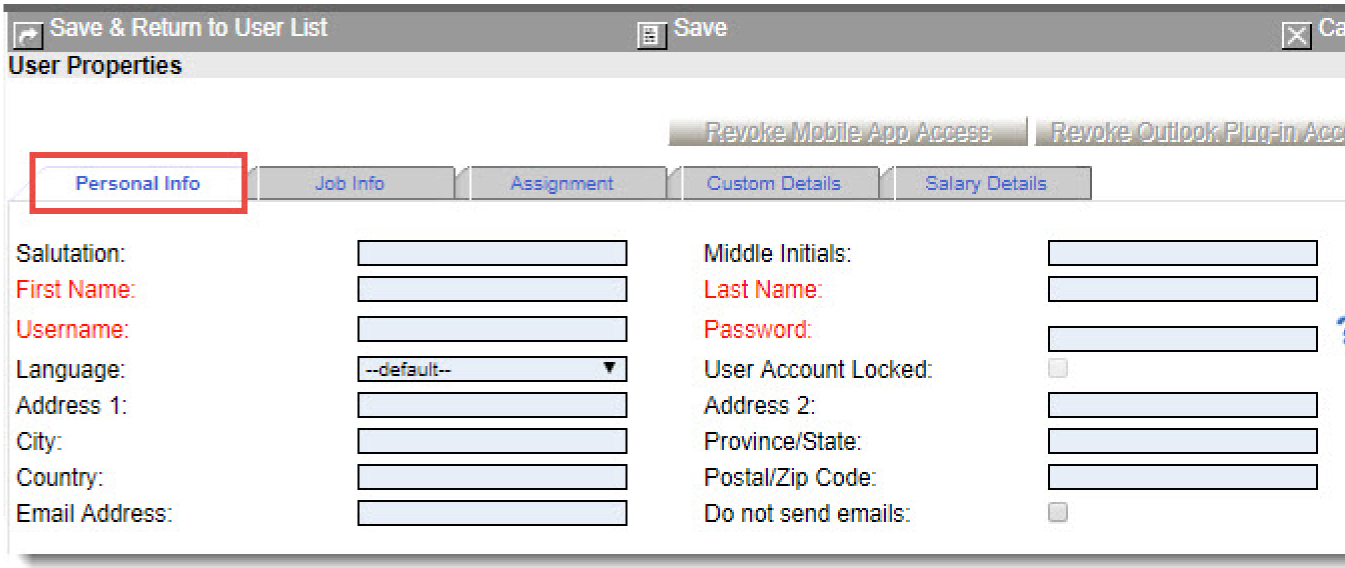
2. Select the process by clicking on Process Details.



Personal Information Entry

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

1. Type the First Name.

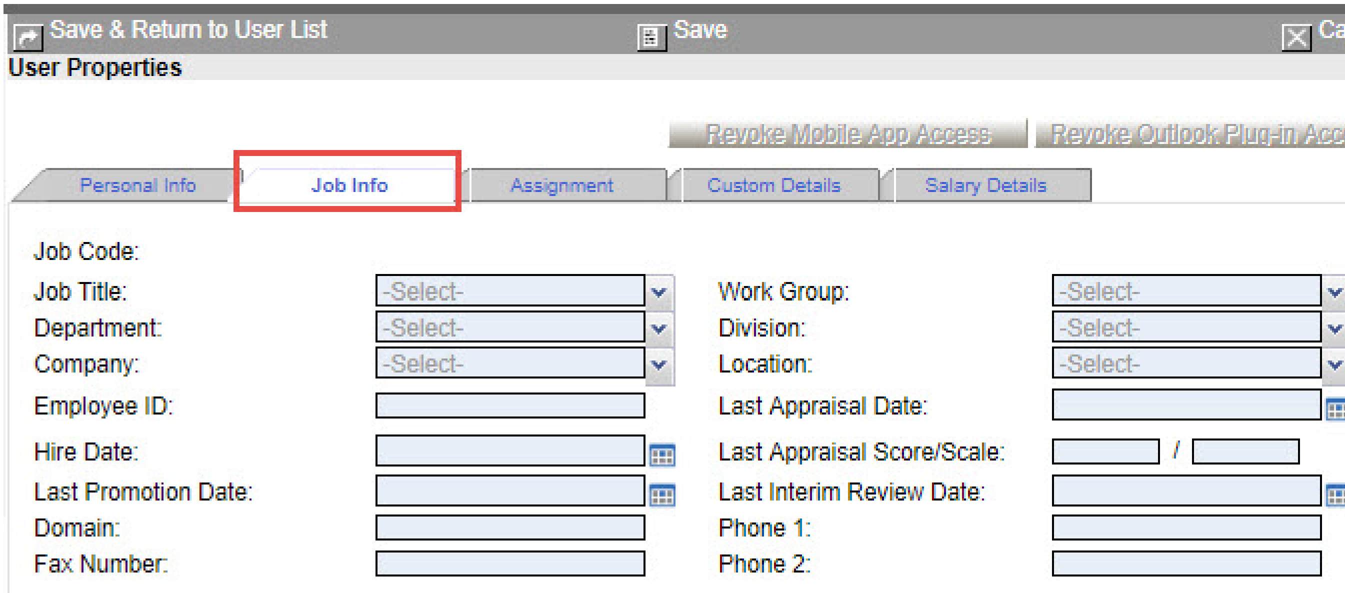


2. Type the Last Name.
3. Type the Outlook userid in the Username field.
4. Type a Password.
5. Select the Language of preference.
6. Type the Email Address.

Job Information Entry

You must enter the job information.

1. Click the Job Info tab .

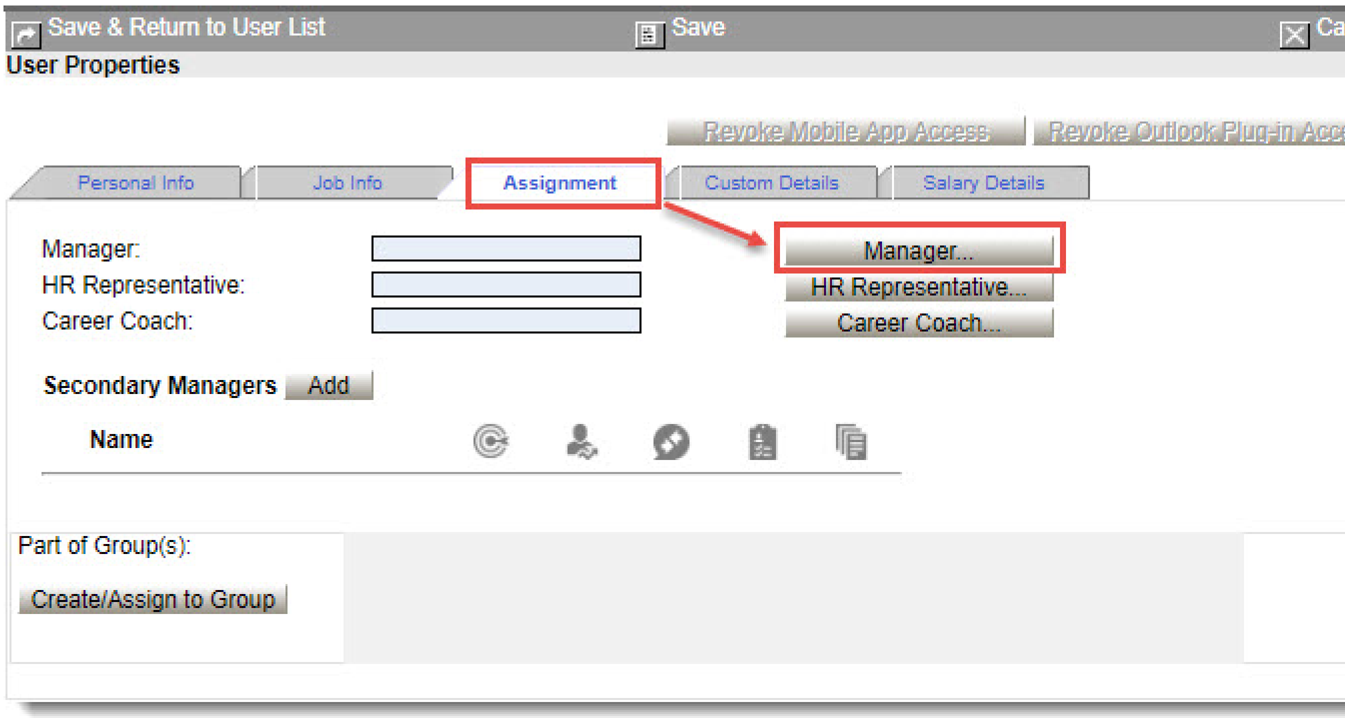


2. Type the position title in the Job Title field.
3. Type the Department (service) name.
4. Type the sector's in the Division field.
5. Type the nine-digits employee number in the Employee ID field.
6. Type the Hire Date .

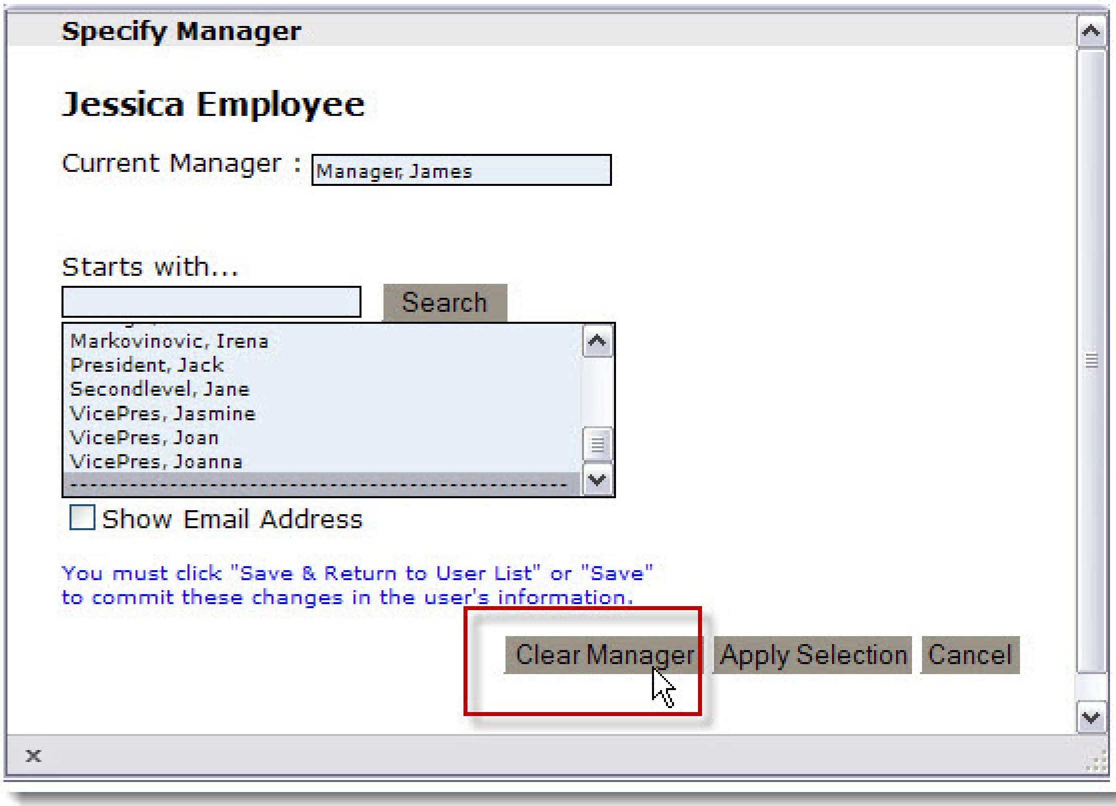
Supervisor Assignment or Modification

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.

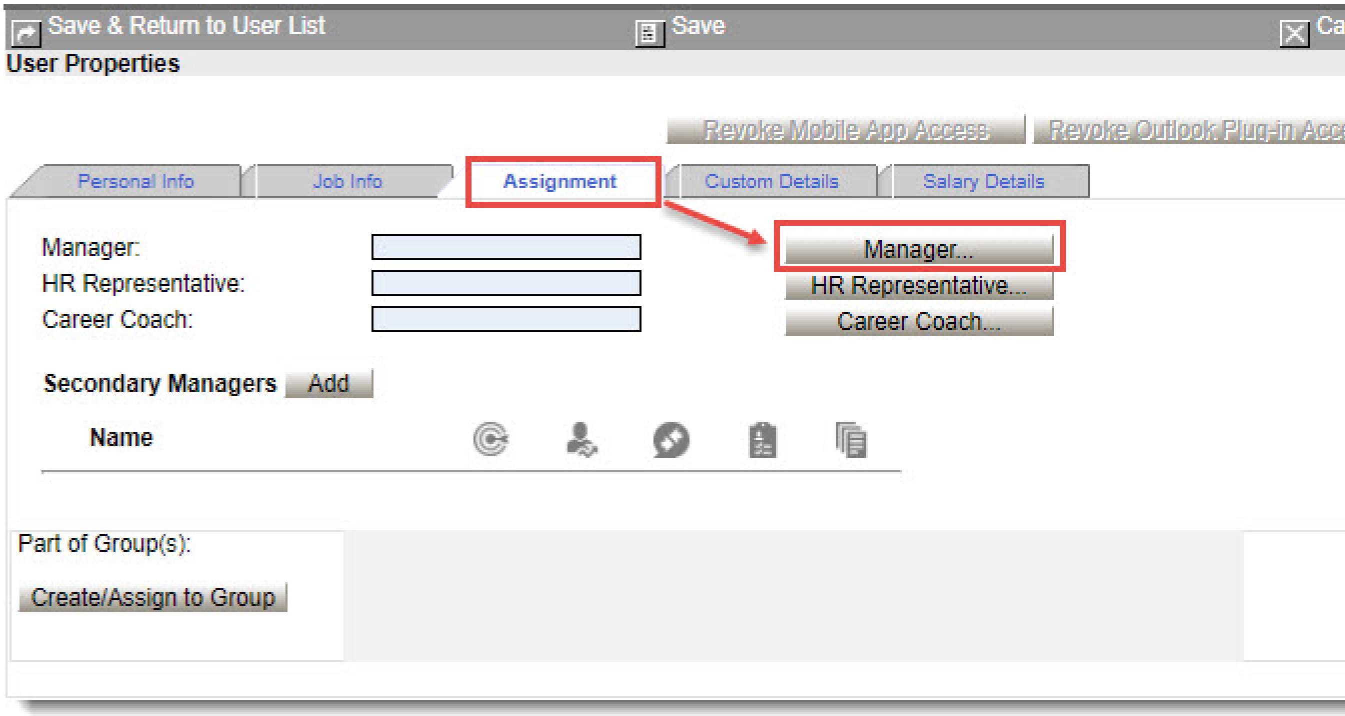
1. Click Manager .



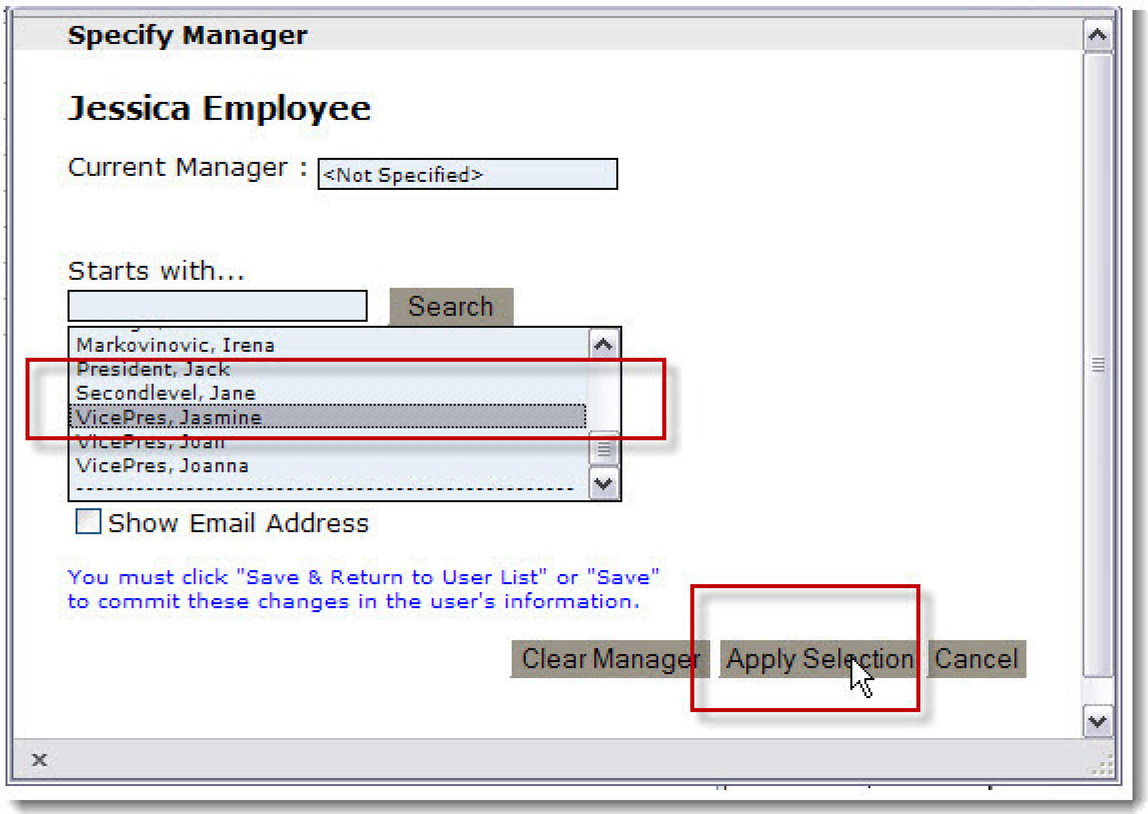
2. (Optional) Click Clear Manager (only if the supervisor's name is incorrect).



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



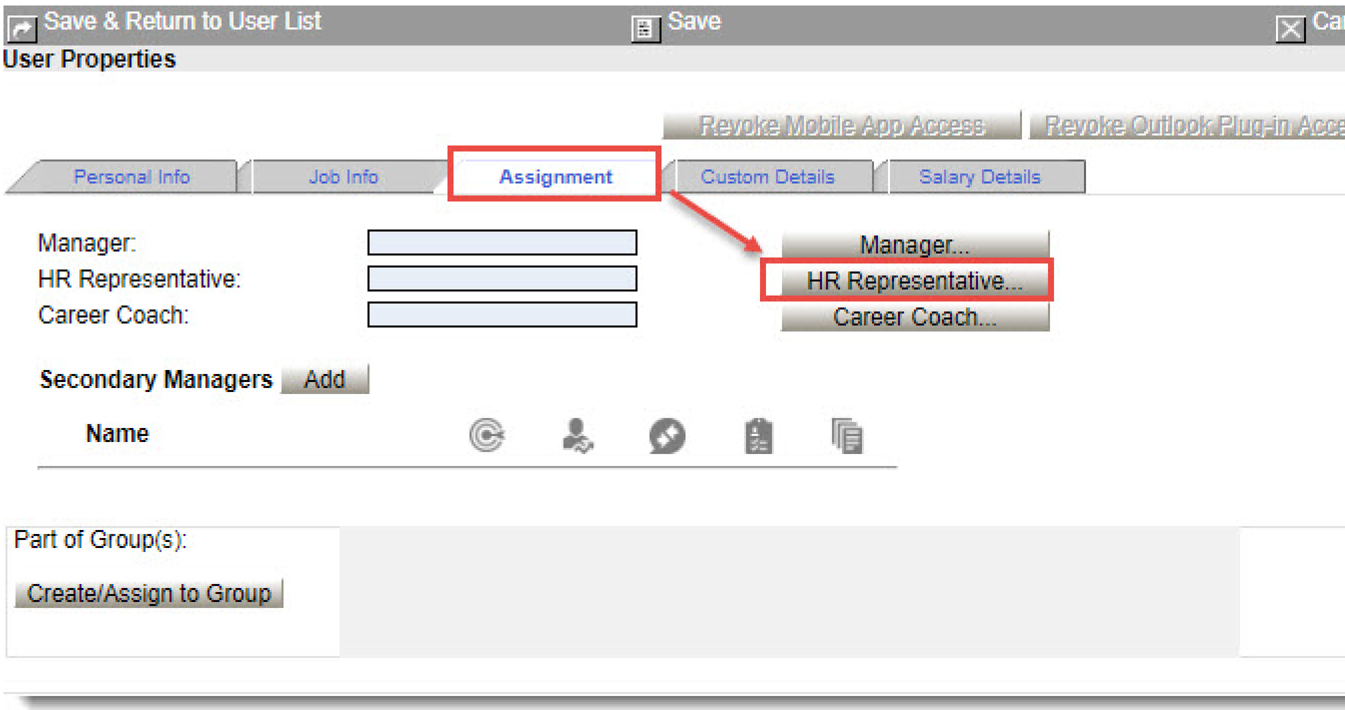
4. Select the supervisor name and click Apply Selection.



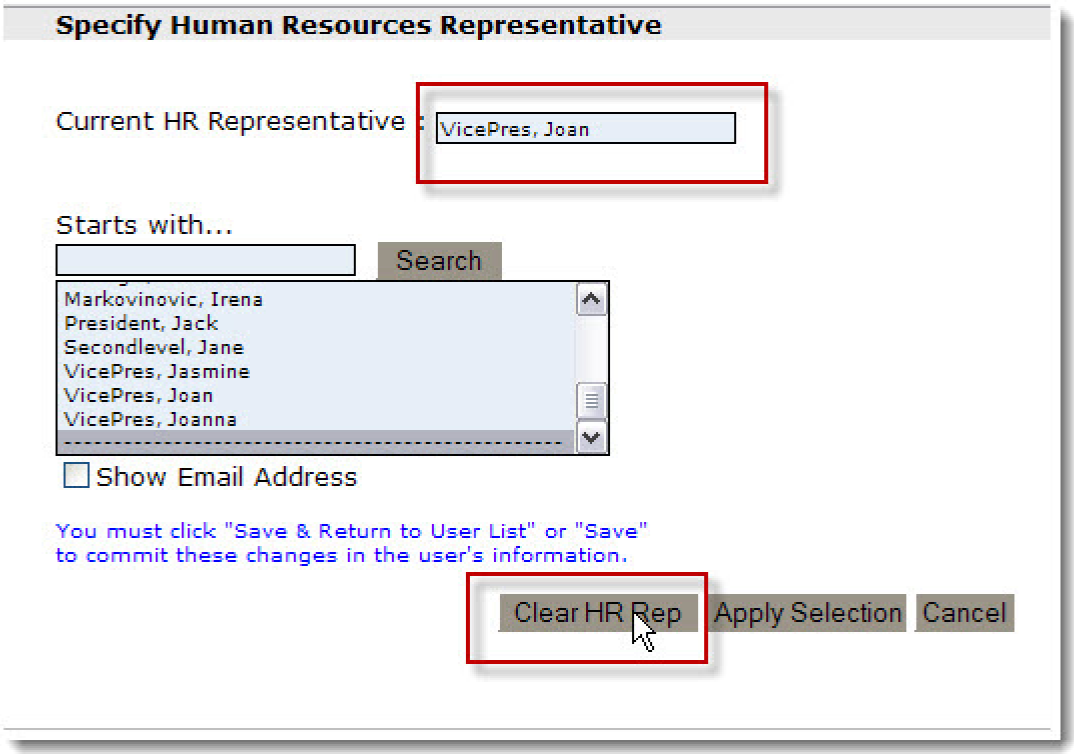
Assignment or Modification of the HR Administrator

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.

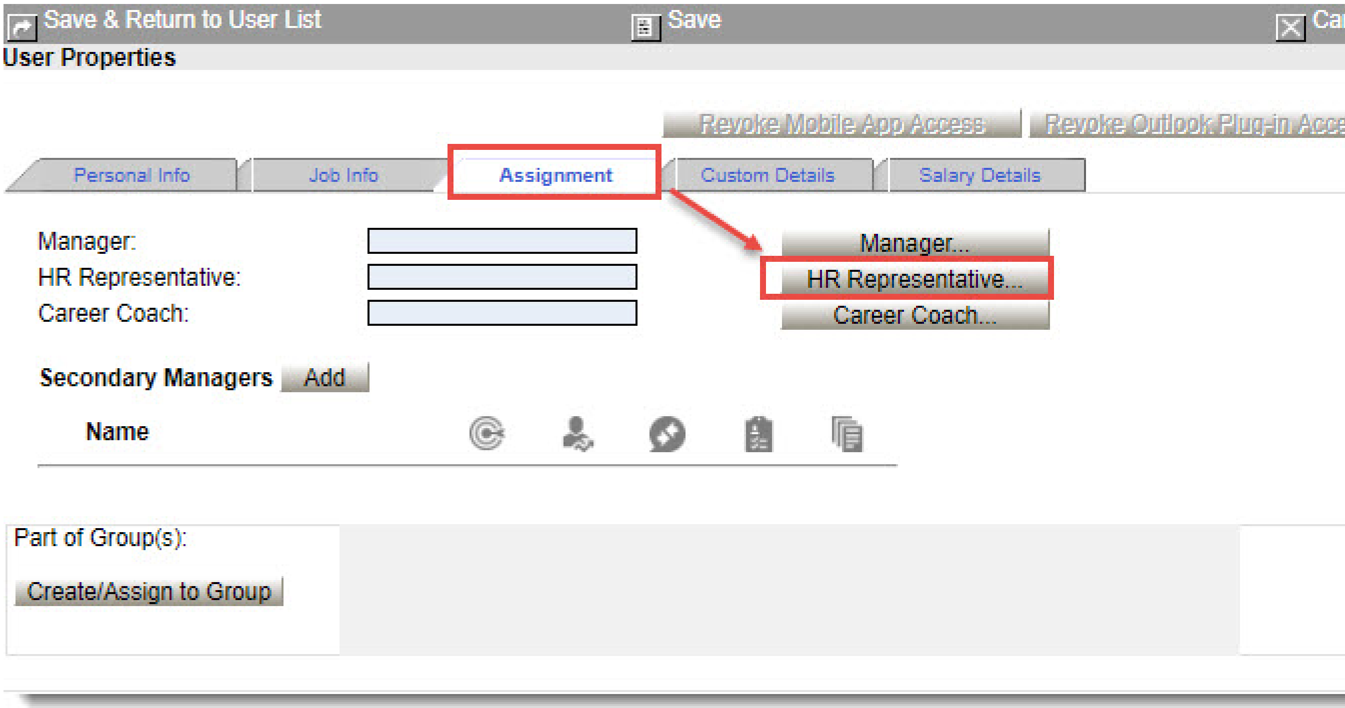
1. Click HR Representative .



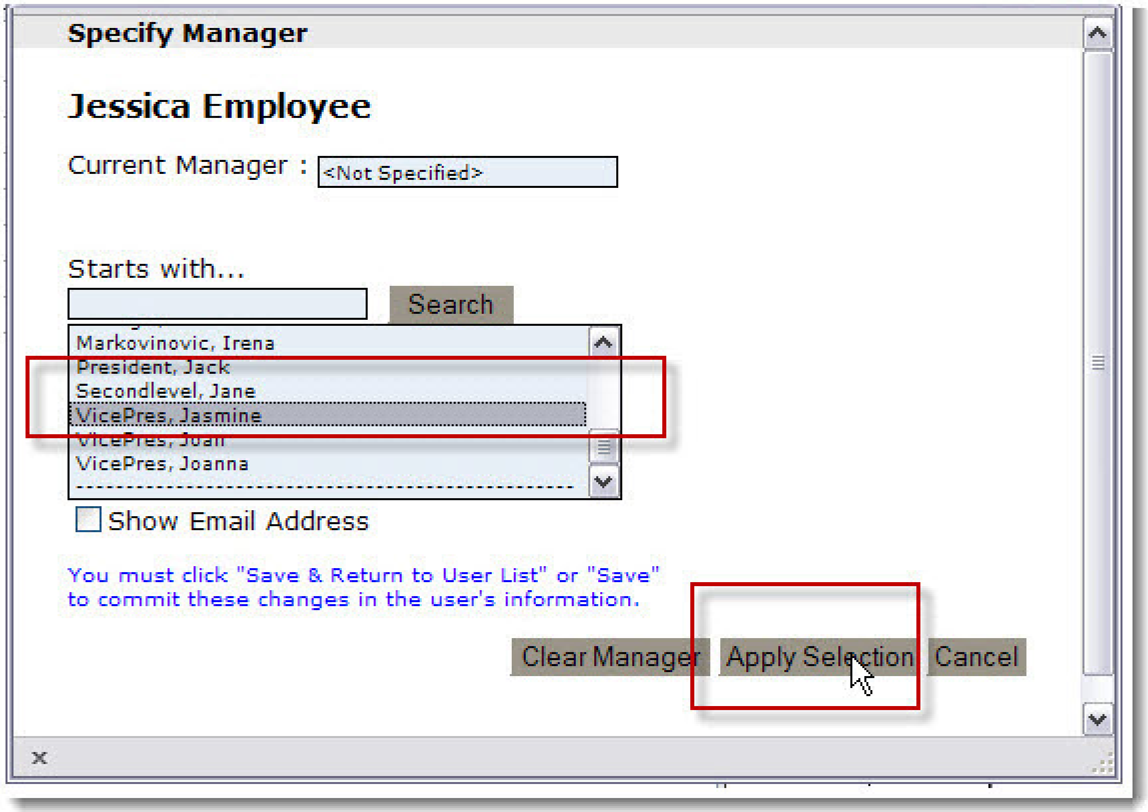
2. (Optional) Click Clear HR Rep (only if the HR Administrator is incorrect).



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



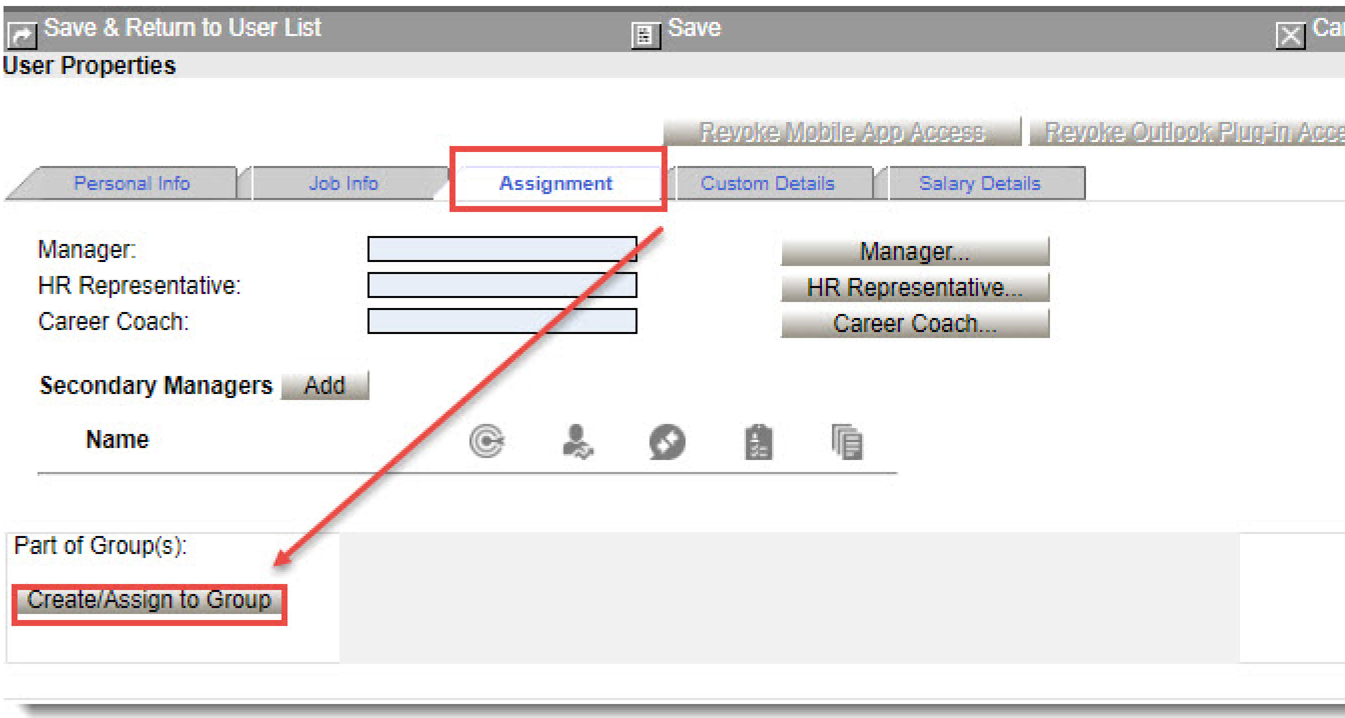
4. Select the HR Administrator name and click Apply Selection .



Group Assignment

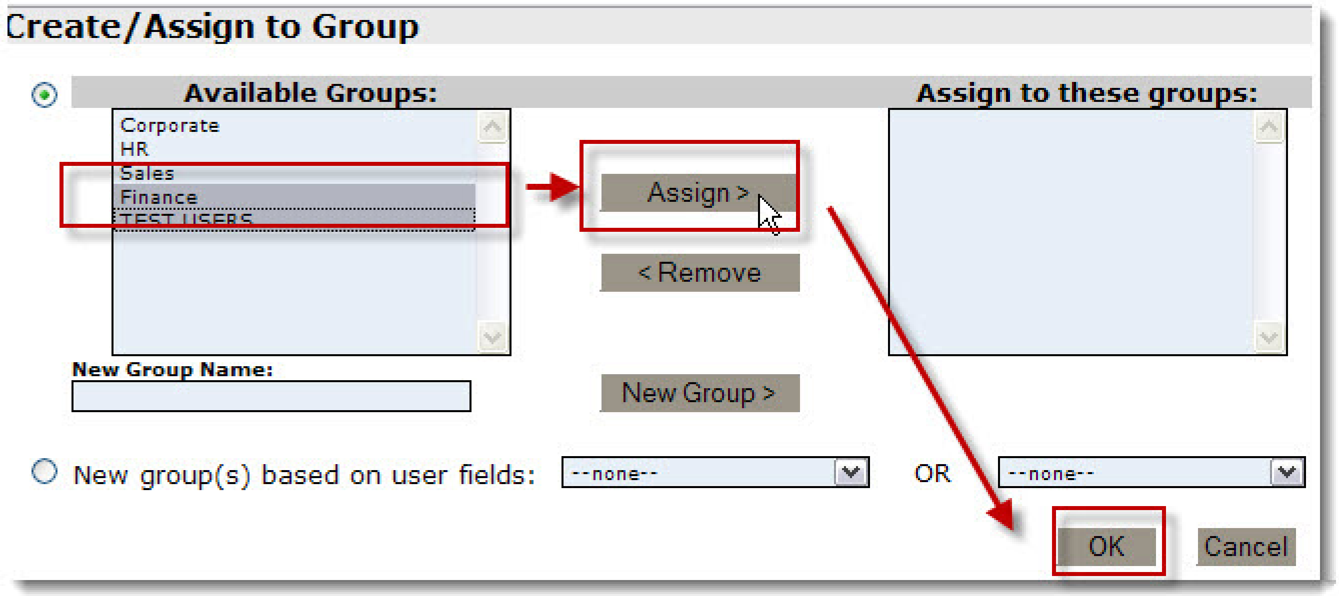
The user that you are creating must be assigned to a groupe. The groups are used to produce grouped reports and are used to assign the different Halogen forms.

1. Click Create/Assign to Group .



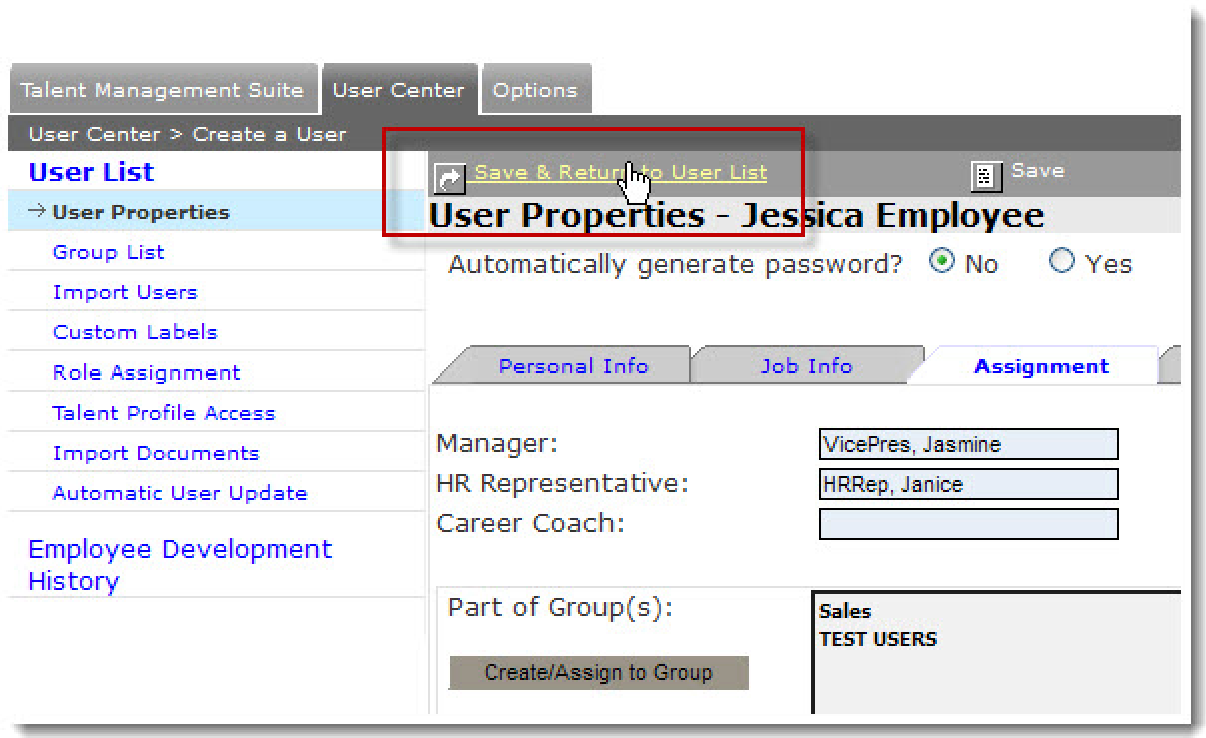
2. Select the group(s) to which the employee must belong.
   Press the *CRTL* key of the keyboard and click on the group namessimultaneously to select more than one group.
3. Click Assign Group .

4. Click OK.


Create/Assign to Group
Available Groups:
Assign to these groups:
Corporate
HR
Sales
Finance
TEST USERS
Assign >
< Remove
New Group Name:
New Group >
New group(s) based on user fields:
--none--
OR
--none--
OK
Cancel

User Center Parameters Saving

1. Click Save and Return to User List.



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