UNIVERSITY of ALASKA
Many Traditions One Alaska

myUA

Performance Evaluation Essentials

Program Outline

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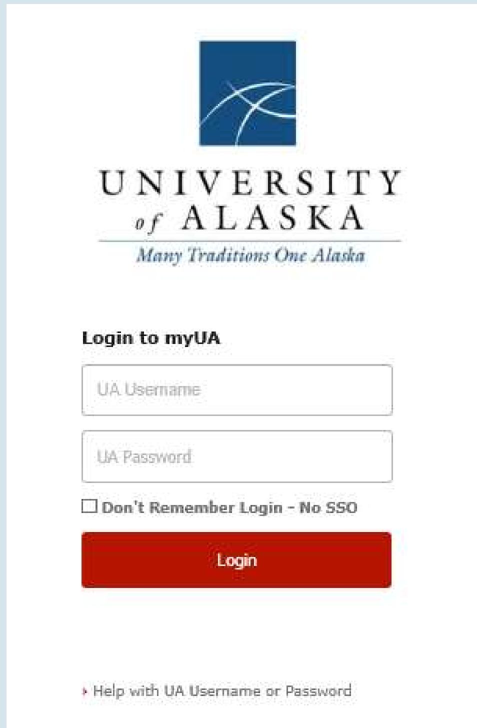
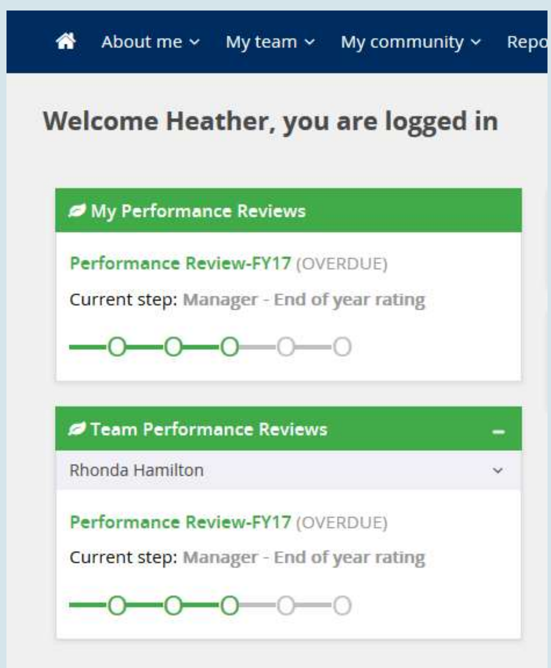
Quick Reference Guide – Navigating the myUA Dashboard

What you need to do	What you will see
STEP 1: Sign-in to myUA Go to http://myua.pageuppeople.com Sign-in using your UA Single Sign-on credentials.	
STEP 2: View open performance reviews Open performance reviews are viewable from the main dashboard performance widgets (green). Your own performance reviews are under the **My Performance Rev**iews widget, and reviews for which you are the supervisor are listed under the **Team Performance Reviews** widget. **NOTE:** Only current performance reviews display via the widgets. To access historical reviews, see the Accessing Completed Reviews section of the guide.	

STEP 3: Alternative ways to access reviews To access your own performance review: From the ribbon at the top of the screen, hover over **About me** and select **Performance reviews** from the drop-down menu. To access a performance review for a subordinate: From the ribbon at the top of the screen, hover over **My team** and select **Performance reviews** from the drop-down menu. **TIP:** If you have supervisors who report to you, you can access their subordinates' reviews by hovering over **My team** and selecting **Organizational chart**. You can drill down to their employees by selecting **View: Team** under their avatar.	 

Quick Reference Guide – Create Performance Evaluation

What you need to do	What you will see
STEP 1: Select Create Hover over Create on the ribbon and select **Performance review** to initiate your own review or **Team member's performance review** to create a review for a subordinate	

STEP 2: Initiate Review

The **Review Start Date** automatically populates with today's date.

Select the appropriate review process from the **Review process** drop-down list. If the employee supervises, please select the review denoted as **"(Supervisory)"**.

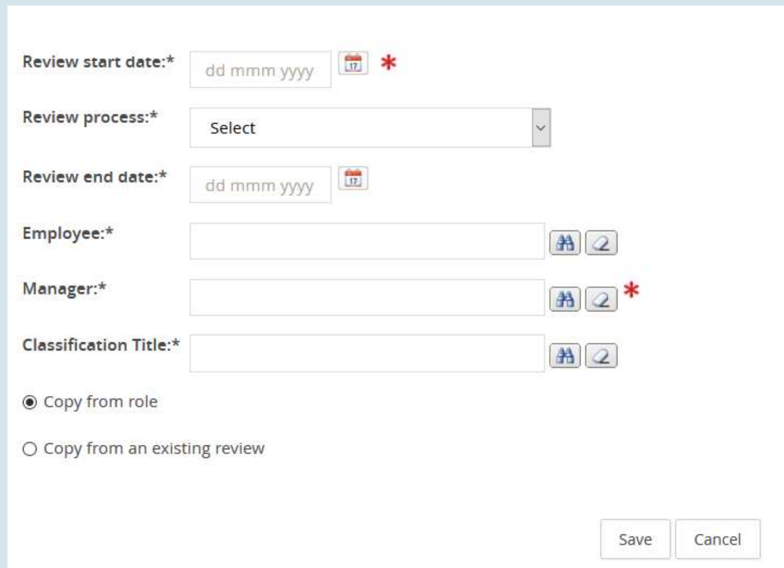
The **Review end date** will auto-complete based on the review process.

To complete the **Employee, Manager, and Classification Title** fields you can type directly into the field, or use the binoculars look-up icon. If you need to make a change, use the eraser icon to clear the field contents.

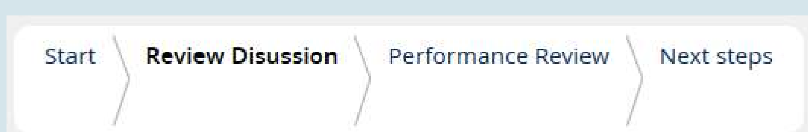
Once all the fields are completed, select **Save** to initiate the review.

NOTE: If you are starting your own review, the **Employee, Manager, and Classification Title** fields are automatically populated.

When starting reviews for subordinates, only the **Manager** field automatically populates, but the **Classification Title** field will auto-complete once the **Employee** field is completed.

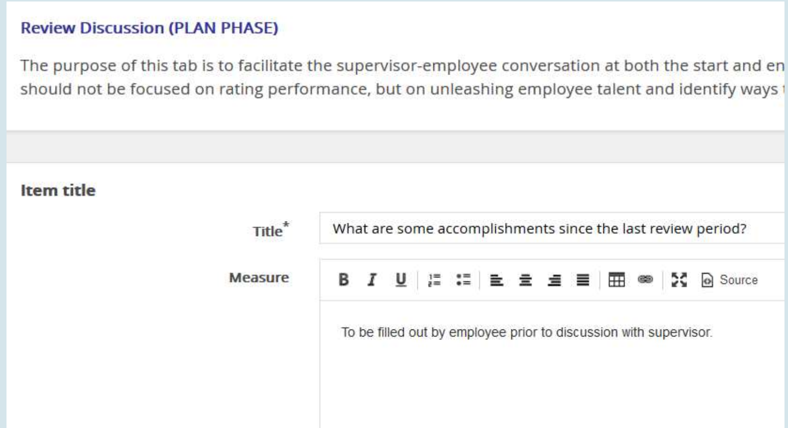


Quick Reference Guide – Review Discussion Tab (Set Goals step)

What you need to do	What you will see
STEP 1: Select Review Discussion Tab Click **Review Discussion** from the breadcrumb trail at the top of the review.	

STEP 2: Answer Review Discussion Questions

The four questions listed in this tab are to facilitate the review discussion between the supervisor and employee. Prior to meeting with the supervisor, the employee can answer the questions via the text box, as well as upload documents if needed.



Quick Reference Guide – Performance Review Tab (Set Goals step)

What you need to do	What you will see

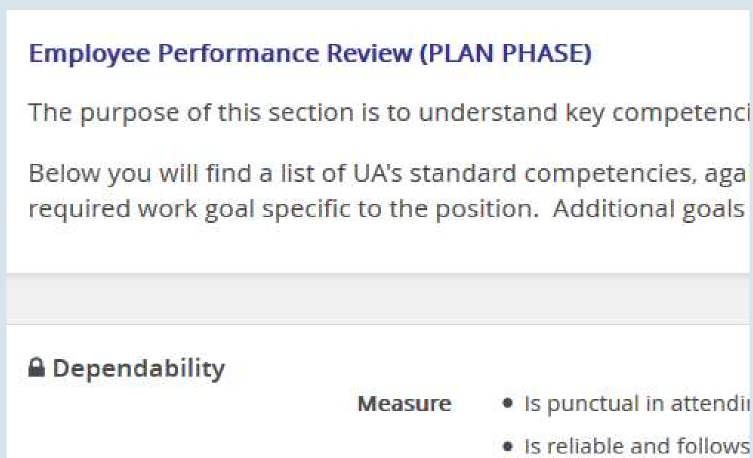
STEP 1: Select Performance Review Tab

Click **Performance Review** from the breadcrumb trail at the top of the review.

STEP 2: Review Competencies

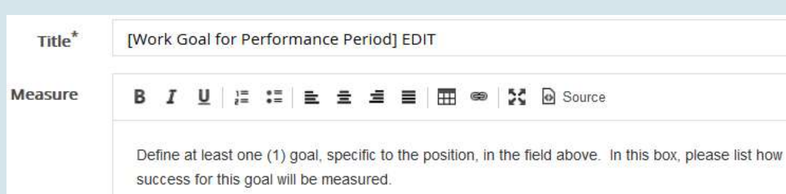
When reading the competency measures, consider how these attributes specifically relate to your job duties and performance.

Supervisor and employee will discuss these to ensure mutual expectations.



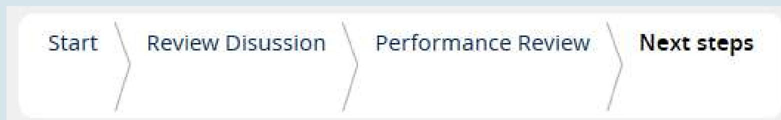
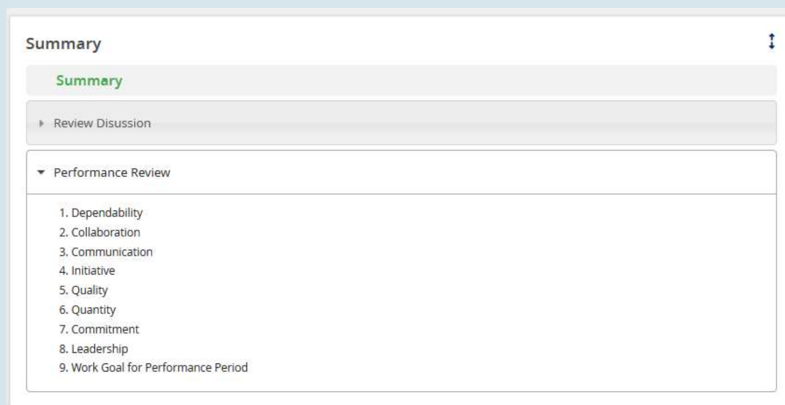
STEP 3: Complete Goal(s)

At the bottom of the **Performance Review** tab, at least one goal for the review period needs to be completed. Enter the goal in the **Title** field and the measure by which defines success in the **Measure** text box.

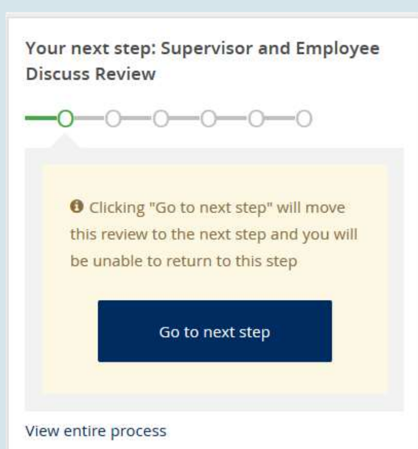


<table>
<tr>
<td>To add more goals, use the Add Goal(s) button.</td>
<td>
</td>
</tr>
</table>

Quick Reference Guide – Next Steps Tab (Set Goals step)

<table>
<tr>
<th>What you need to do</th>
<th>What you will see</th>
</tr>
<tr>
<td>STEP 1: Navigate to Next Steps Tab
Click Next steps from the breadcrumb trail at the top of the review.</td>
<td>
</td>
</tr>
<tr>
<td>STEP 2: Review Summary
An overview of the Review Discussion and Performance Review tabs are displayed in the Summary section.</td>
<td>
</td>
</tr>
<tr>
<td>STEP 3: Move Performance Review to Next Step
Once the fields in the other tabs have been complete, the review can be moved to the next step by selecting the Go to next step button.

The supervisor will then receive an automated email letting them know that the Set Goals step is complete and they should set up a meeting to discuss the review with the employee.

The employee can also send additional communication to their supervisor vie the Send e-mail section at the bottom of the Next steps tab.</td>
<td>
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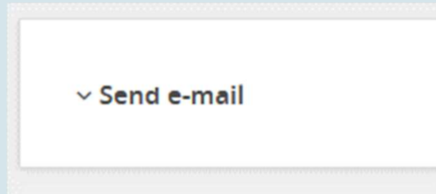
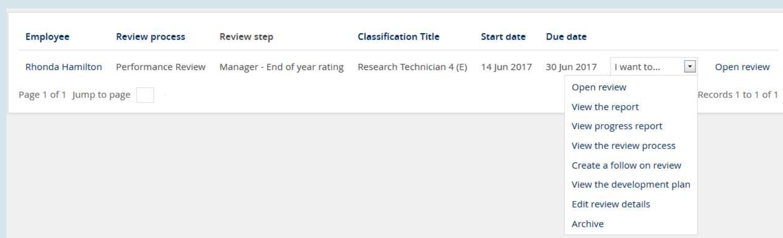
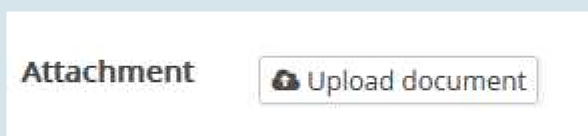
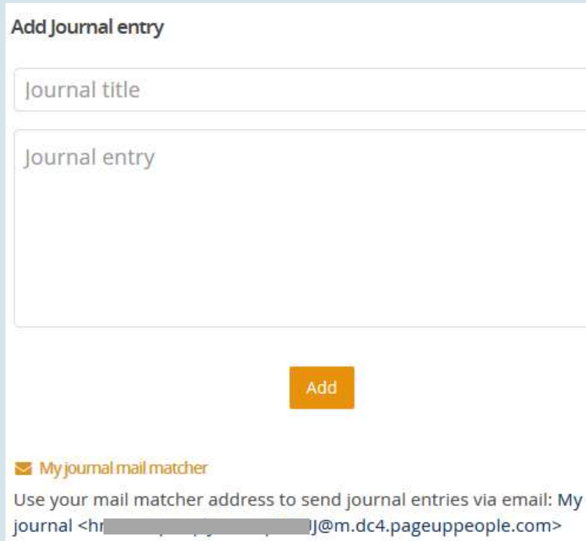
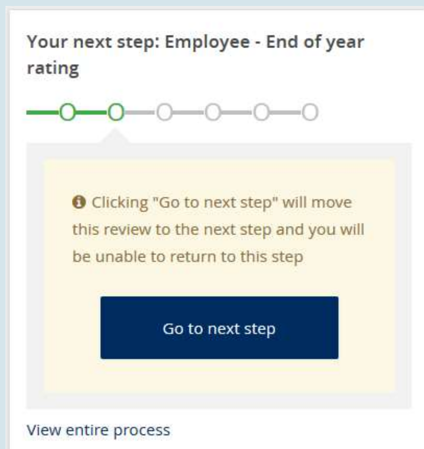
	

Quick Reference Guide – Supervisor and Employee Discuss Review

What you need to do	What you will see
STEP 1: Set-up Meeting with Employee The supervisor will arrange for a meeting with the employee. The supervisor can choose to work in the review while meeting with the employee, or print the review for reference to the review discussion questions and answers, competencies and goals. To print the report select **Team Performance Reviews** widget header. Under the employee's review record, select the **I want to…** drop down list and then select **View the report**. The review will load as a .pdf file and can be printed from the Adobe viewer.	 
STEP 2: Document Meeting After the meeting, edits and notes can be made directly into the review items. Additionally, documents can be uploaded against the Review Discussion items.	
STEP 3: WAIT and Document Progress The review can wait at this step until the end of the review period, decided on during the supervisor-employee meeting. During this time, you can document progress towards goals, successes, challenges, etc. using the **Journal** feature. From the ribbon at the top of the screen you can select Journal entry and makes notes that can then later be linked to the performance review. You can also use the	

personalized mail matcher email address listed at the bottom of the journal entry screen to email directly into your journal. Journal items are private unless actively linked into the performance review during the rating steps.	
STEP 4: Move Performance Review to Next Step Once the review period is over, the review can be moved to the next step by selecting the **Go to next step** button. The employee will then receive an automated email letting them know that the review is ready for them to self-rate.	

Quick Reference Guide – Employee – End of year rating step

What you need to do	What you will see
STEP 1: Select Review Discussion Tab Click **Review Discussion** from the breadcrumb trail at the top of the review.	
STEP 2: Add comments regarding next steps Under each question, comments can be added by selecting the **Add comment** button.	

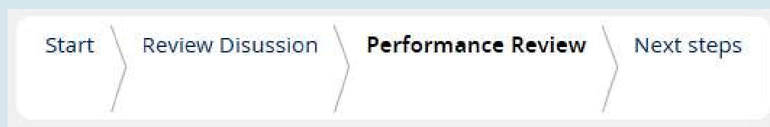
You can save the comment as a draft, or as a personal reminder, you can select the **Save as Private** button. To publish the comment for all users to see, select **Save & Share**.

STEP 3: Link Journal Entries or Documents

To link a journal entry into a review item, select the button and select the appropriate option from the drop-down menu.

STEP 4: Select Performance Review Tab

Click **Performance Review** from the breadcrumb trail at the top of the review.

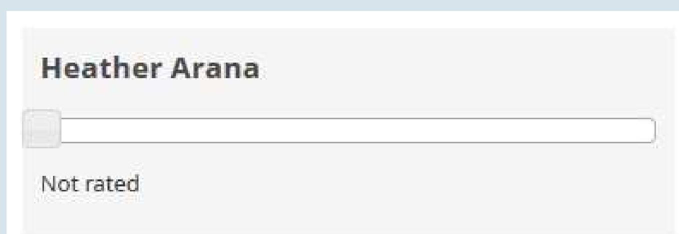


STEP 5: Rate Competencies and Goals

Under each element, use the slider on the right side of the screen to select the rating for each competency and goal. The ratings are as follows:

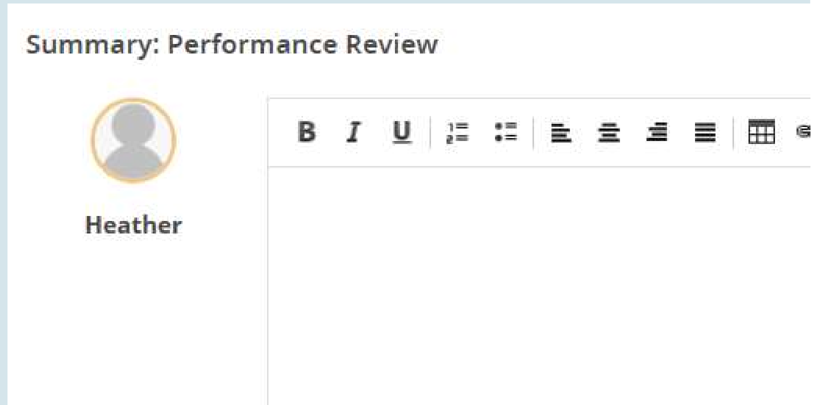
- Needs Improvement
- Meets Improvement
- Exceeds Improvement

Comments, Journal Entries, and Documents can be added to all elements in this tab. See **STEP 2** and **STEP 3**.



STEP 6: Summary Comments

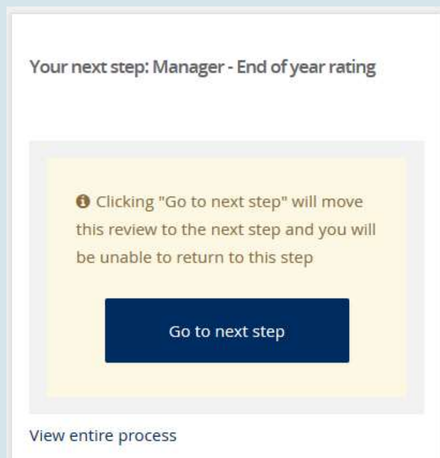
At the bottom of the Performance Review tab there is an opportunity to enter overall notes about the review period.



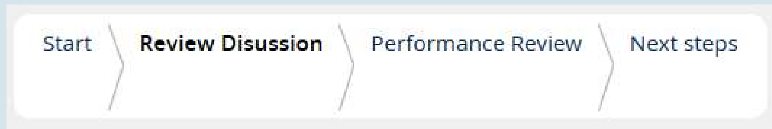
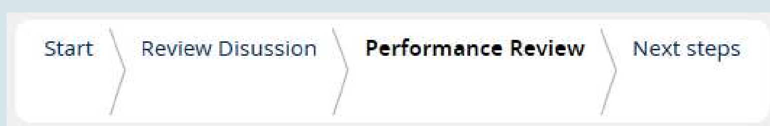
STEP 7: Move Performance Review to Next Step

After completing the self-rating step, the review can be moved to the next step by selecting the **Go to next step** button.

The supervisor will then receive an automated email letting them know that the review is ready for them to rate.



Quick Reference Guide – Supervisor – End of year rating

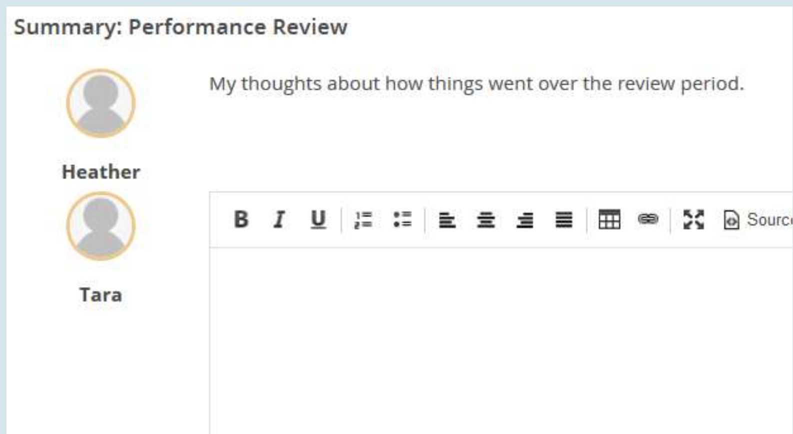
What you need to do	What you will see
STEP 1: Select Review Discussion Tab Click **Review Discussion** from the breadcrumb trail at the top of the review.	
STEP 2: Add comments regarding next steps Under each question, comments can be added by selecting the **Add comment** button. You can save the comment as a draft, or as a personal reminder, you can select the **Save as Private** button. To publish the comment for all users to see, select **Save & Share**.	
STEP 3: Link Journal Entries or Documents To link a journal entry into a review item, select the button and select the appropriate option from the drop-down menu.	
STEP 4: Select Performance Review Tab Click **Performance Review** from the breadcrumb trail at the top of the review.	

STEP 5: Rate Competencies and Goals
Under each element, use the slider on the right side of the screen to select the rating for each competency and goal. The ratings are as follows:

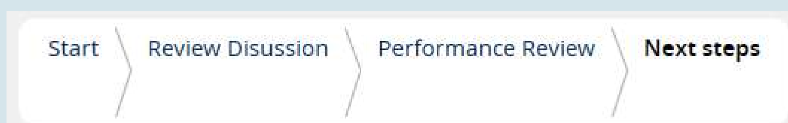
- Needs Improvement
- Meets Improvement
- Exceeds Improvement

Comments, Journal Entries, and Documents can be added to all elements in this tab. See **STEP 2** and **STEP 3**.

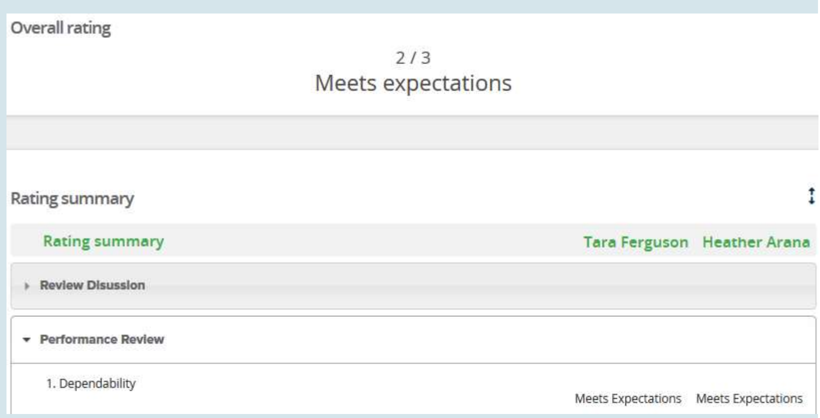
STEP 6: Summary Comments
At the bottom of the Performance Review tab there is an opportunity to enter overall notes about the review period.

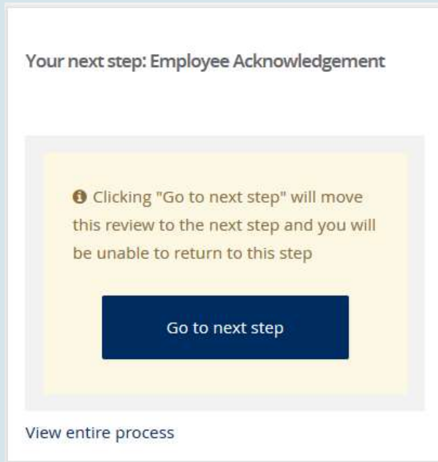


STEP 7: Select Next Steps Tab
Click **Next steps** from the breadcrumb trail at the top of the review.



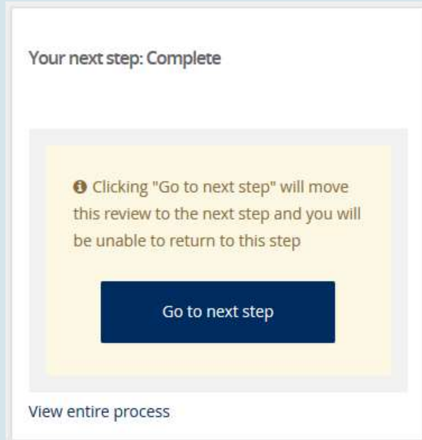
STEP 8: Review overall review ratings
The overall ratings, as well as the ratings for individual elements, via the Overall rating and Rating summary sections..



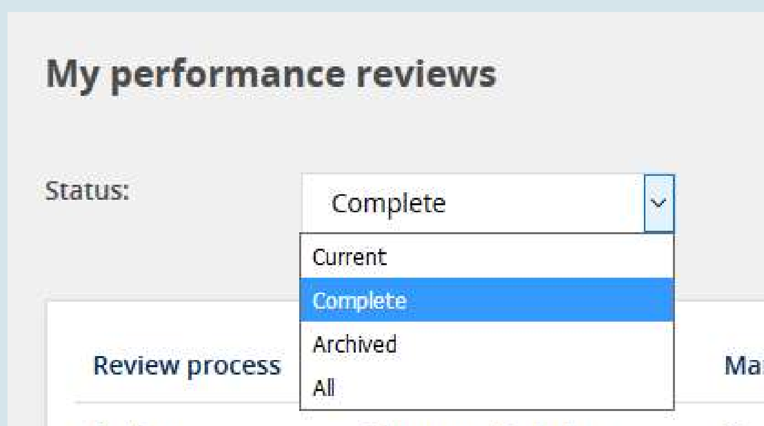
STEP 9: Move Performance Review to Next Step After completing the rating step, the review can be moved to the next step by selecting the **Go to next step** button. The employee will then receive an automated email letting them know that the supervisor's ratings are ready for them to review, and that the supervisor will reach out to set up a meeting to discuss the final performance review.	
STEP 10: Make an appointment with employee to discuss performance review	

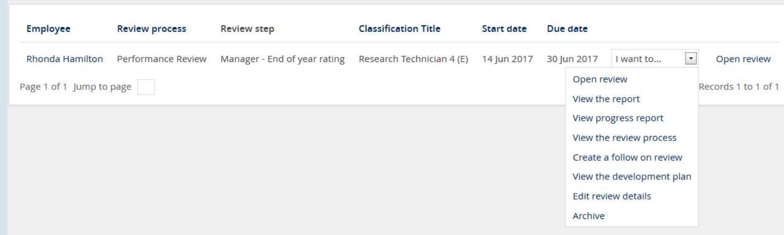
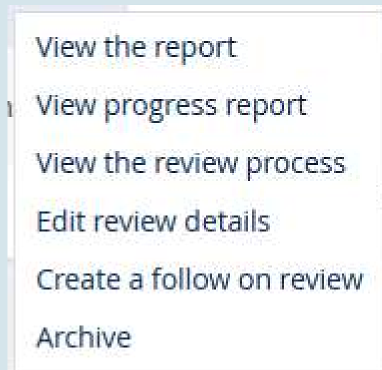
Quick Reference Guide – Acknowledging Post-Review Discussion

What you need to do	What you will see
STEP 1: Employee-Supervisor Meeting Employee and supervisor meet to discuss the employee's performance for the review period and next steps for the items in the review discussion tab. This is also an opportunity to discuss goals for the next review period.	
STEP 2: Select Next Steps Tab Click **Next steps** from the breadcrumb trail at the top of the review.	

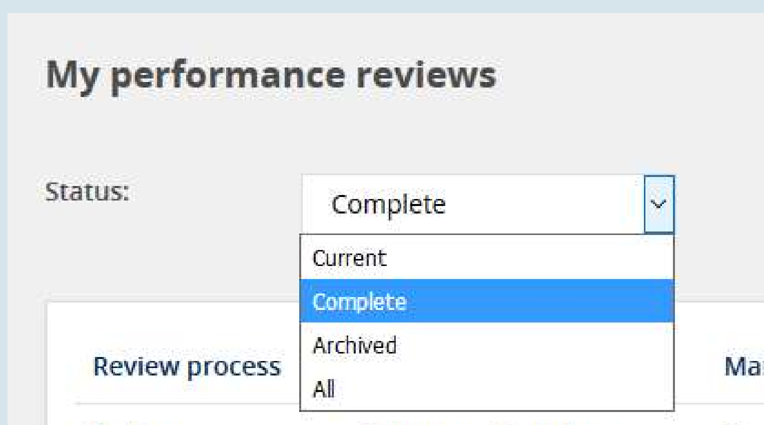
STEP 3: Move Performance Review to Next Step After completing the post-review discussion between the employee and supervisor, the review can be moved to the next step by selecting the **Go to next step** button. The review is now complete. The review for the next performance review period can be initiated.	

Quick Reference Guide – Accessing Completed Reviews

What you need to do	What you will see
STEP 1: View All Performance Reviews Select the top of with **the My Performance Review** or the **Team Performance Review** widgets.	
STEP 2: Select Review Status Filter From the **Status** drop-down menu, select **Complete**.	

STEP 3: Select Action Select the **I want to…** drop down list and then select the desired action.	 

Quick Reference Guide – Printing Reviews

What you need to do	What you will see
STEP 1: View All Performance Reviews Select the top of with **the My Performance Review** or the **Team Performance Review** widgets.	
STEP 2: Select Review Status Filter From the **Status** drop-down menu, select the appropriate status of the review in question.	

STEP 3: View/Print Review

Under the employee's review record, select the **I want to…** drop down list and then select **View the report**. The review will load as a .pdf file and can be printed from the Adobe viewer.

Quick Reference Guide – Adding Comments/Uploading Documents

What you need to do	What you will see

To Add Comments

Under each question and review item, comments can be added by selecting the **Add comment** button.

You can save the comment as a draft, or as a personal reminder, you can select the **Save as Private** button. To publish the comment for all users to see, select **Save & Share**.

To Link Journal Entries or Documents

Under each question and review item, there is an option to link journal entries and upload documents.

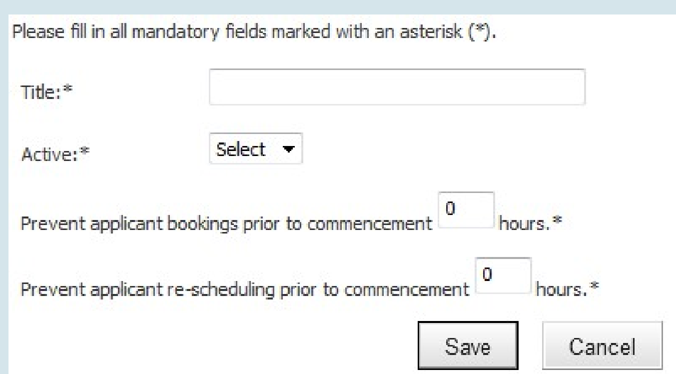
To link a journal entry into a review item, select the button and then select the appropriate option from the drop-down menu.

STEP 3: Add Event type

To create a new Event type, click **New event type** at the top of the page.

Fill in the information relating to the new event type.

NOTE: By entering a figure in Prevent applicant bookings prior to commencement you stop an applicant from being able to change or book into an event through the applicant services centre.



Quick Reference Guide – Management reports

Management reports

The Management Reports Module provides comprehensive data that can be manipulated in many different ways to present various reports. These reports allow the user to see the "big picture", and are excellent for custom charting. Management Reporting provides a complete overview without losing any detail

Reports can be filtered and exported to various file formats such as Microsoft Excel, PDF, and CSV.

Reports can be used to view a number of interest areas such as how many jobs are opened and filled, how long it's taking to fill roles, how effective various sources are in attracting applications, and how much it's costing to fill the roles.

Benefits:

- Identify gaps and bottlenecks in your recruitment process
- Ability to schedule regular reports to be sent to users email addresses

Features:

- Report filtering by business units, jobs, recruiters, sites and date ranges
- Report viewing facility with ability to drill into detail
- Extensive reports available as outlined below:
  - snapshot of current recruitment activity within the system
  - opened jobs within a given date range
  - jobs sourced to various sourcing channels within a given date range
  - channel source effectiveness by job title and business unit
  - snapshot of the applicant pool
  - complete analysis of a given job showing where applicants are up to in the process
  - assessments of applicants
  - offers with average time to fill by recruiter and business unit
  - declined offers and reason
  - filled jobs within a given date range
  - EEO reporting such as applications by gender and age
- Job costs to work out cost per hire and job costs as a percentage of salary

Solutions

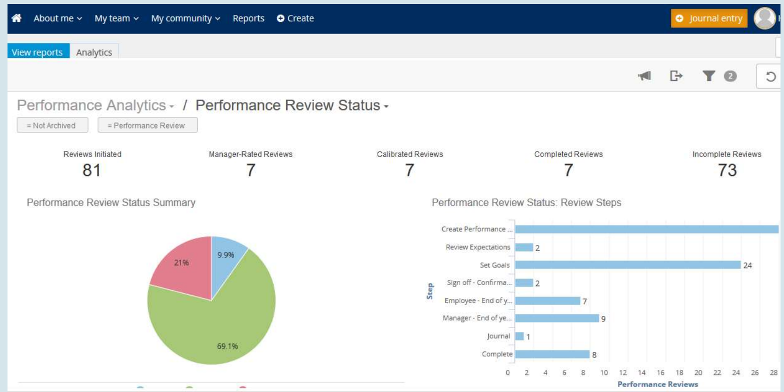
The PageUp platform incorporates three core reporting solutions, these being:

- *Report Builder* - A reporting solution that supports the creation of conventional reports and exporting of data for analysis
- *Standard Analytics* - An out-of-the-box collection of analytical dashboards that support the management of all aspects of recruitment and talent management operations
- *Advanced Analytics* - A premium offering allowing clients to perform customised analytical tasks, as well as the creation and distribution of analytics custom dashboards

Quick Reference Guide – Analytics

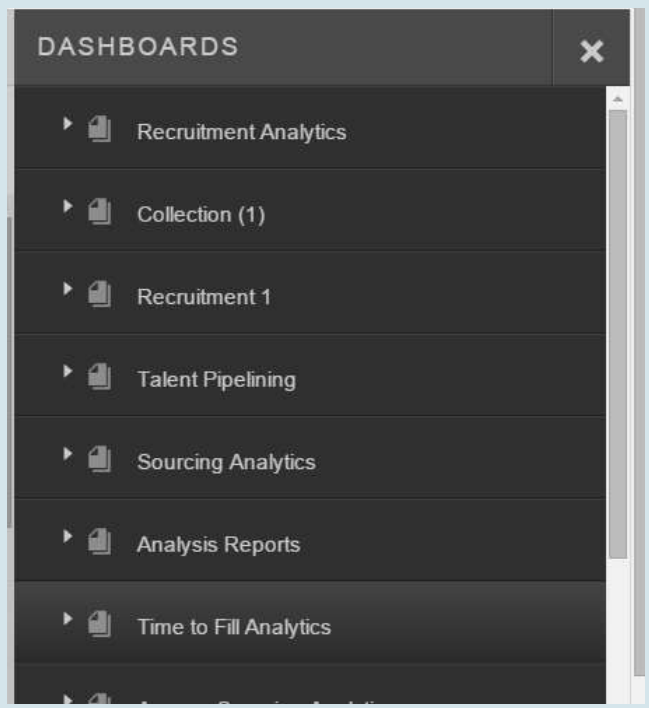
STEP 1: Navigate to Reports section
Click **Reports** from top navigation bar.

Click on the **Analytics** tab



STEP 2: Select a Dashboard Report
Click on the file folder on the right side of browser:

Select the **Analysis** or **Dashboard** report you wish to view from the list.



STEP 3: Set filter criteria
Clicking on the report link will display the report window. Here you will be able to select from the filter criteria available for the report.

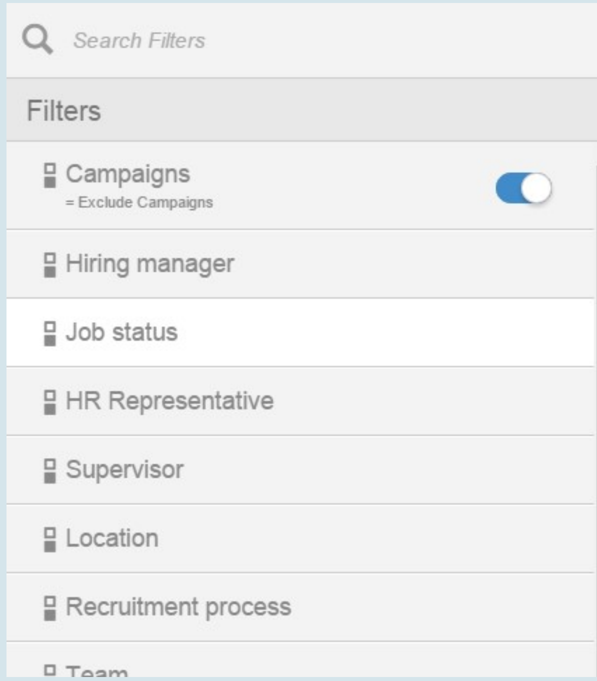
To add a filter, click on the Filters icon towards the top right.

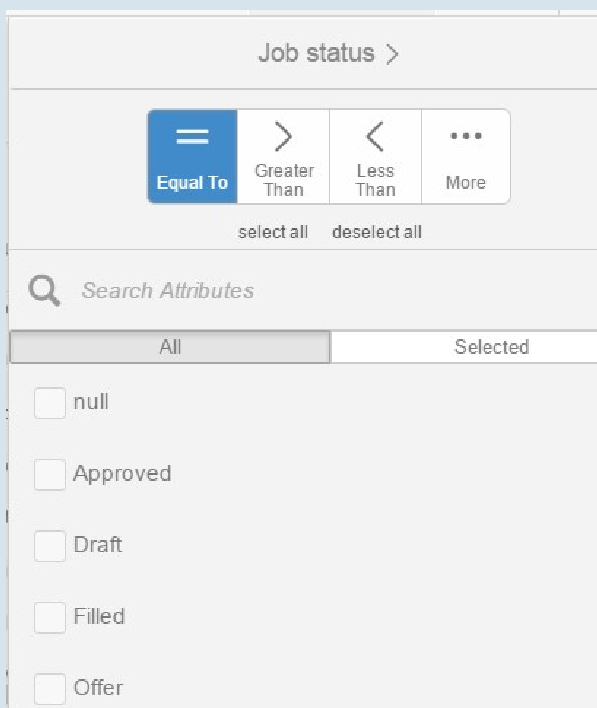
Select the filter that you will like to add.

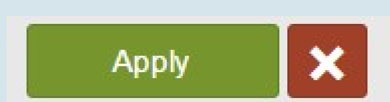
NOTE: Available search criteria may differ depending on the report

Search and select the Attributes you wish to be used as filter criteria.

A message will appear for each filter/attribute selected that will remind you that the filters will not be applied to the report until you select "apply"

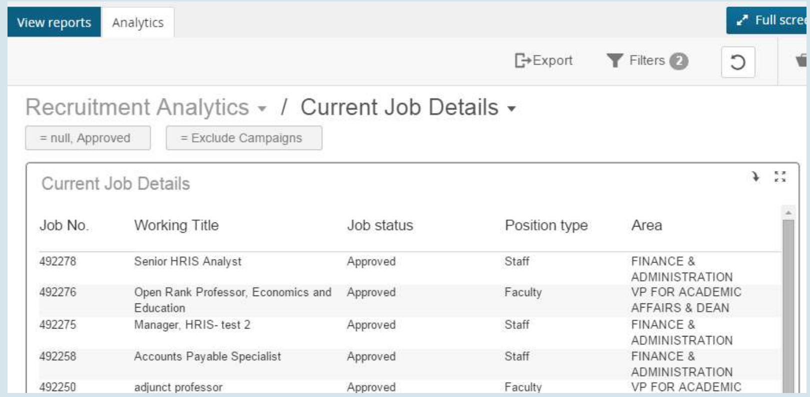






STEP 4: View report

The Analytic report will display once the filters are applied.



STEP 5: Export report

To export click on the **Export** tab towards the top center of page.

The Analytics Report will download as a PDF file.

Quick Reference Guide – Report builder

What is 'Report builder?'

Report builder allows you to create your own reports. You can do this by selecting what you want to report on (e.g. jobs, applicants, current recruitment) and then selecting the columns that you will need in order to create a report that is meaningful to you. Report builder allows you to see your data represented visually through a range of charting options.

<table>
<tr><th>What you need to do</th><th>What you will see</th></tr>
<tr><td>

STEP 1: Navigate to Reports section

Click **Reports** from top navigation bar.

Click on the **View Report** tab

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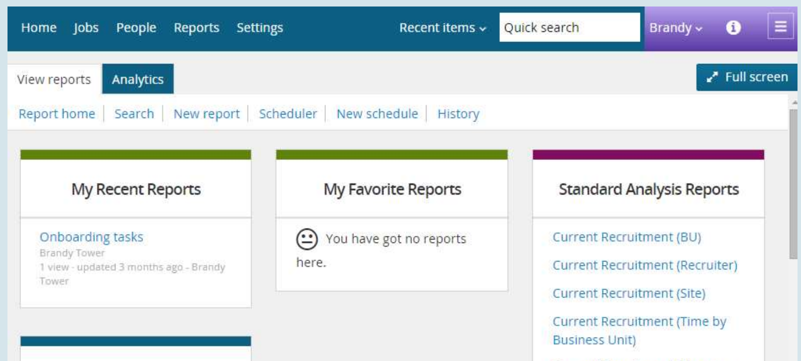

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<tr><td>

STEP 2: Search Reports

Click the **Search** link in the top left hand corner of the page.

A list of all **Report builder** reports will display. From here you can edit, view or export the report into CSV or Excel formats.

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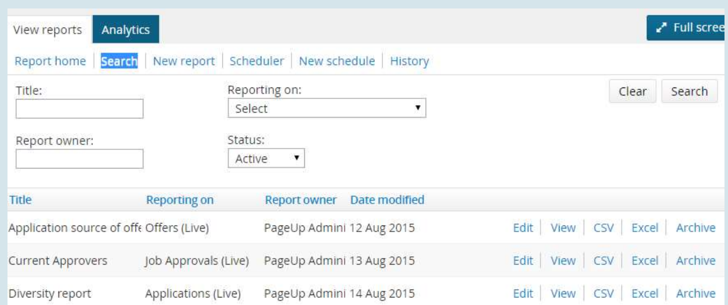

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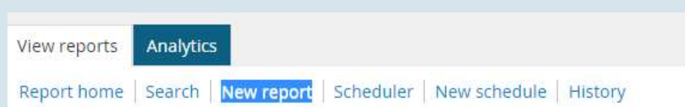
<tr><td>

STEP 3: Create new report

From the Manage: Report builder page, click the **New** link.

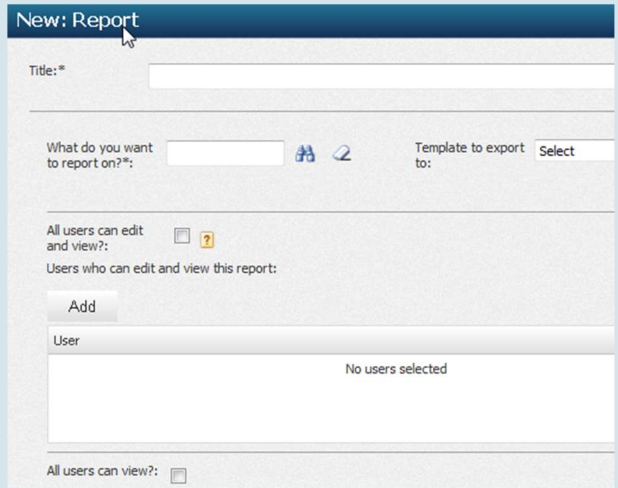
</td><td>



</td></tr>
</table>

STEP 4: New report

Give your report a title that is meaningful to you and to others (if you plan to allow others to view the report).



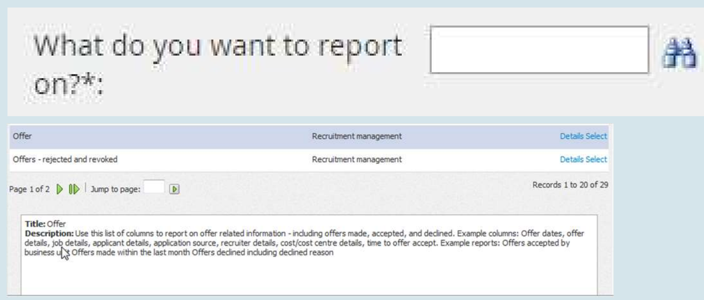
STEP 5: Select data set

Select What do you want to report on?

When creating a new report, it can be difficult to know what to select to complete the 'What do you want to report on?' field.

For each option, the **Details** link will provide information about that option in the panel below.

Click **Select** to select the report you want to create.



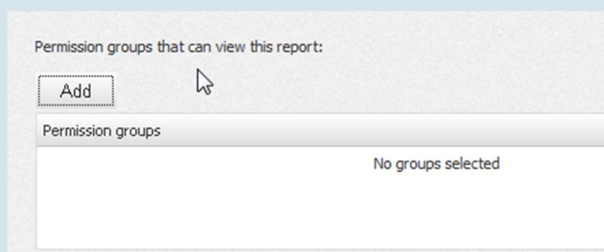
STEP 6: Decide permissions

You can select who can edit and view your report.

To allow only certain users to be able to edit and view the report, click the **Add** button to add users. Otherwise select the **All users can edit and view the report** check box.

To allow only certain users to view this report, click the Add button to add users.

For all users to be able view your report, select the **All users can view this report** check box.



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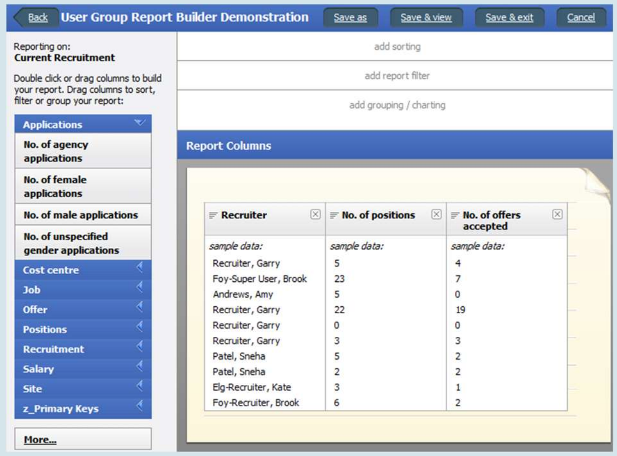
STEP 7: Add columns

Drag and drop or double click the columns (on the left-hand side of the page) onto the workspace to build your report.

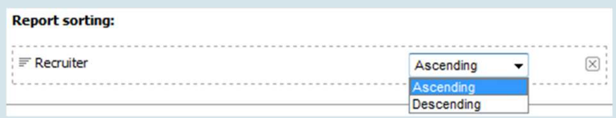
As you drag and drop columns into the report (or double click), the sample data will help you to decide if this is the column you need in your report.



STEP 8: Add sorting

Drag a column from the list on the left hand side to the add sorting section on the right hand side.

TIP: You can sort by more than one value.

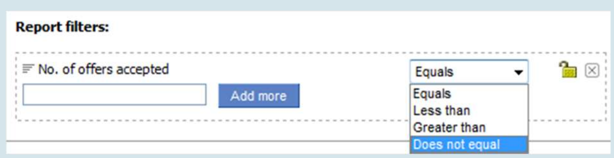


STEP 9: Add report filter

Drag a column from the list on the left hand side to the add report filter section on the right hand side.

Filters allow you to limit the information included in your report and allow you to only include relevant information.

TIP: You can filter by more than one value.



STEP 10: Add grouping or charting

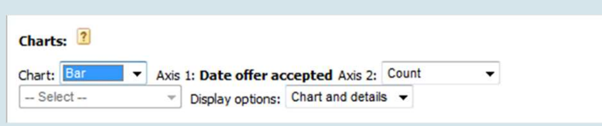
Drag a column from the list on the left hand side to the add grouping/charting section on the right hand side.

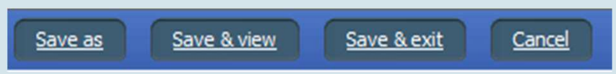
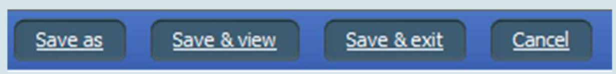
Grouping provides another method of organising the data in your report.

For example, you may drag the Recruiter field into the Report grouping area. This means you will see the current recruitment information grouped by recruiter.

The data within each group will be sorted by the value you have added to the 'add sorting' area.

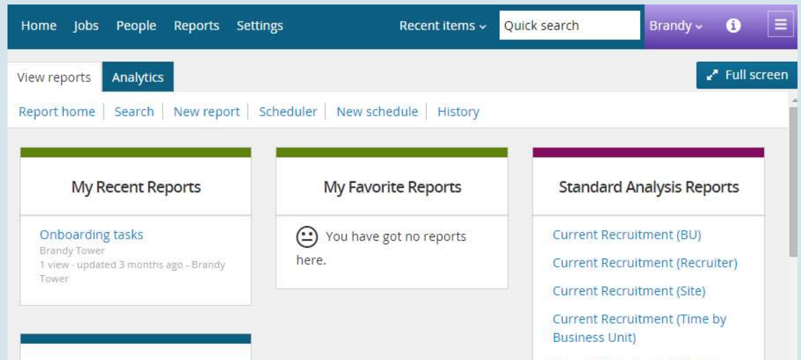
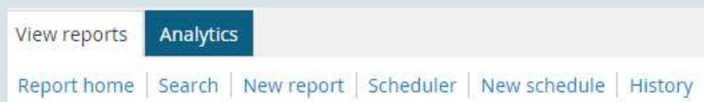
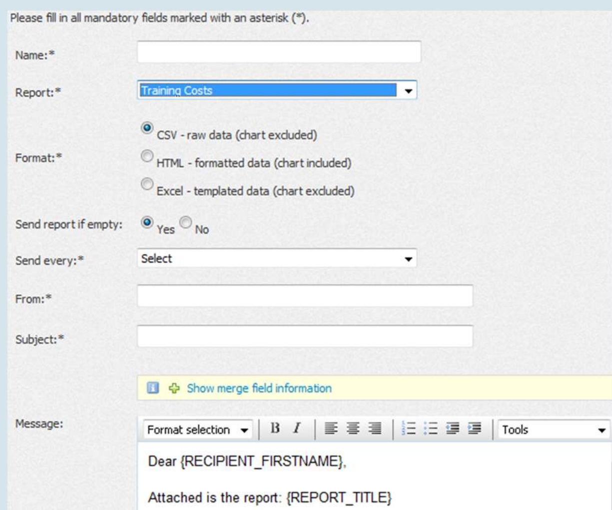
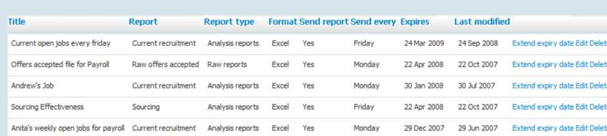
To create a report with a chart, drag a column into the add grouping/charting section on the right hand side.



Select a chart type. Chart types available are Bar, Pie, Line, Column, Area and Radar. Select the function you need to be performed and displayed on Axis 2. The options are: Count, Sum and Average. The default option is Count. If you choose Sum or Average, you must select the value you wish to Sum or Average (e.g. Vacancies). Axis 1 will always default to the Level 1 grouping. The chart will be displayed after you click **Save & Run**.	
STEP 11: Save and view When editing the layout of a report, you can click the Save & view button. This can be found on the top right hand corner of the page.	
STEP 12: Save and exit All reports that you create are stored on the Manage: Report builder page.	
STEP 13: Export report Select a format from the links next to the report. Then download file when prompted	

Training

Quick Reference Guide – Scheduled Reports

What you need to do	What you will see
STEP 1: Navigate to Reports section Click **Reports** from top navigation bar. Click on the **View Report** tab	
STEP 2: Click Scheduler Click the Scheduler link to view a list of currently schedule reports	
STEP 3: Create new report delivery Click the **New schedule** link. Give your delivery schedule a name. Select the report you wish to schedule from the drop down list. Check the radio button next to the format you want the report to be sent. Select when you would like the report to be sent form the **Send every** drop don list. An e-mail will be sent to any users you add to receive the report. Click the **Add Users** button and select any additional users you wish the report to be delivered to.	
STEP 4: Details of created report delivery Once you have clicked Save, you will be redirected to the Scheduler page which will now display the newly created report schedule.	

Title	Report	Report type	Format	Send report	Send every	Expires	Last modified	
Current open jobs every friday	Current recruitment	Analysis reports	Excel	Yes	Friday	24 Mar 2009	24 Sep 2008	Extend expiry date Edit Delete
Offers accepted file for Payroll	Raw offers accepted	Raw reports	Excel	Yes	Monday	22 Apr 2008	22 Oct 2007	Extend expiry date Edit Delete
Andrew's Job	Current recruitment	Analysis reports	Excel	Yes	Monday	30 Jan 2008	30 Jul 2007	Extend expiry date Edit Delete
Sourcing Effectiveness	Sourcing	Analysis reports	Excel	Yes	Friday	22 Apr 2008	22 Oct 2007	Extend expiry date Edit Delete
Anita's weekly open jobs for payroll	Current recruitment	Analysis reports	Excel	Yes	Monday	29 Dec 2007	29 Jun 2007	Extend expiry date Edit Delete