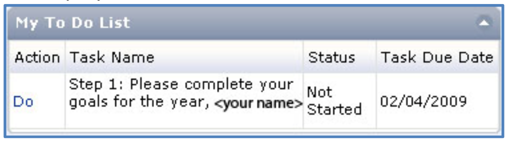
Exempt Staff Online Performance Management
Enter and Modify Goals—Quick Reference Guide

Log On to eNDeavor

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

Check Your Task List and General Information

1. Look at **My To Do List** for open tasks to work on. The task: *Step1: Please complete your goals for the year <your name>* will display with a status of *Not Started* and a task *Due Date*.



2. Click **Do** (Action column). This takes you to the Overview screen, where the Workflow Graphic indicates you are on *Step 1: Employee Sets Goals* of the nine-step (performance management) process.
3. Scroll to the General Information area and check that your personal and manager information is correct.
   NOTE: <u>If incorrect</u>, continue with your task, but inform your manager of any corrections to be made.

Review Competencies

1. Scroll to the top of the Overview screen and click the **Behavioral Competencies** tab.
2. Read the text in the Information box at the top of the screen.

Enter Your First Goal (or Development Activity)

1. Scroll to the top of the screen and click the **Goals** tab (or **Development Plan** tab).
2. Read the text in the Information box at the top for important tips.
3. Scroll down to the header **Goals: Goal 1 of 1** (or **Development Plan: 1 of 1**).
4. Click in the Goal (or Development Activity) text box and enter your first SMART goal (or your first activity).
   NOTE: You need not include due date in your goal or activity, since you'll be entering one later.
5. In the Date field, click the blue box ... (right of arrow buttons).
6. From the calendar pop-up, select a due date (or target date)—use the arrows and dropdowns as necessary to move through calendar.
   NOTE: If entering an activity, proceed to #7 below.
7. For Development Activity, select a Status of **Not Started** from the dropdown and then enter Metrics and Action plan in the two remaining text fields.

Add Additional Goal (or Development Activity)

1. Scroll to the top of the window and click *once* on the **Add Goal** button (or **Add Development Activities** button).
   NOTE: It may appear that nothing has happened, but look under the Information box— the indicator now shows: *Goals: Goal 1 of 2* (or *Development Plan: 1 of 2*).
2. Press **Page Down** on your keyboard and enter the second goal (*Goal 2 of 2* or *Development Plan 2 of 2*).
3. Enter the *due date* (or *Target Date, Status, Metrics and Action plan*).
4. Add other goals or activities in the same manner.

Remove a Goal or Activity

1. On the Goals (or Development Plan) screen, scroll to the goal (or activity) you wish to remove.
2. Click the **Remove Goal** (or **Remove Development Activities**) button for that goal.
3. Click **OK** in the prompt box, to confirm the removal.

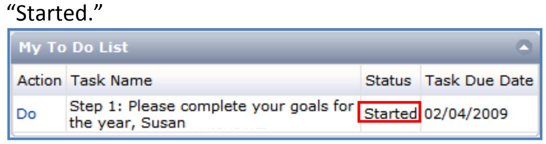
Send Goals/Activities to Your Manager

1. When you have entered all your goals and activities, click **Send Forward** at the top of the window.
2. Click **Yes** to confirm that you want to send the goals/activities forward.
3. In the System Confirmation box, click **Return to Home**.
4. Your Step 1: Complete Goals task is now removed from My To Do List.

Save a Draft of Your Goals and Development Plan

If you are ever interrupted during your entry, you can save a draft to complete at a later time.

1. Scroll to the top of the Goals or Development Plan screen and click **Save Draft**.
2. Click **Yes** to confirm save.
3. If necessary, click **Dashboard** from the Home menu at left. Your To Do List still lists your goals task, but its status is now "Started."



<u>Resume work on your draft</u>

1. Open your web browser and go to: **endeavor.nd.edu**
2. From My To Do List, click **Do**.
3. Click **Goals** tab (or **Development Plan** tab).
4. <u>To edit existing goal/activity</u>: Scroll to goal/activity and revise content of text boxes or due date/target date.
5. <u>To add another goal/activity:</u> Click the **Add Goal** button (or **Add Development Activities** button) at top of window (upper left), scroll down to new goal/activity box and enter text and date.
6. <u>To remove goal/activity:</u> Scroll to the goal/activity you want to remove and click its **Remove Goal** button (or **Remove Development Activities** button).
7. <u>To complete goals/activities and send to manager:</u> Scroll to top of page and click **Send Forward**, then click **Yes** to confirm. Click **Return to Home**. Step 1 Complete Goals task is now removed from My To Do List.

View Manager Feedback and Modify Goals/Activities

After you "send forward" your goals and activities, your manager will review them and probably "send back" to you suggestions for changes.

1. Log in to **endeavor.nd.edu** and access the Home Dashboard.
2. On the Home Dashboard, look at **My To Do List**. You will again see the open task: *Step 1: Please complete your goals for the year <your name>*.
3. Click **Do** (Action column).
4. In the Feedback/Comments screen, read your manager's comments.
5. At the top of the screen, click the **Goals** tab (or the **Development Plan** tab).
6. Scroll to the goal/activity you need to modify and edit text and date as necessary.
   NOTE: Use the **Add Goal/Add Development Activities** and **Remove Goal/Remove Development Activities** buttons as necessary.
7. When your modifications are complete, click **Send Forward** (top of screen).
8. Click **Yes** to confirm send forward.
9. Click **Return to Home**. The Step 1: Complete Goals task has again been removed from My To Do List.

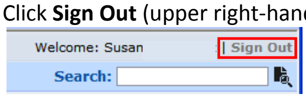
NOTES:

- If your manager again sends back feedback comments, the Step 1: Complete Goals task will again appear in My To Do List.
- If your manager approves your goals/activities and sends them forward in the process, you will receive an email notification.

Sign Out of eNDeavor

When you are done working in eNdeavor, it is always a good idea to sign out of the system.

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

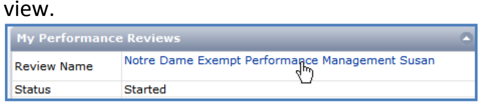


2. Click the **Close** button (red X) to close the browser window.

View Your Goals and Development Activities after Sending Forward

If you want to view your goals and development activities after you've sent them forward to your manager:

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

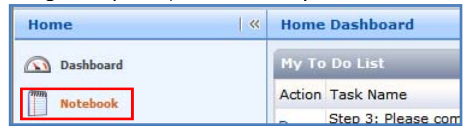


2. Click **View Form** at the top of the Performance Process Status list.
3. Above the Workflow Graphics screen you can see your manager's most recent Feedback Comment(s).
4. Scroll down to see your recently sent forward goals and development activities.

Use the Notebook Function

The Notebook tool can be used to keep personal notes regarding your performance management. For instance, you could enter examples of progress against your goals directly into your Notebook, or you can also copy information from a Word document and paste it into your Notebook.

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



2. To create a new note, click the **New** button.
   A new note screen opens. The date of entry is already populated with the current date. (This can be changed by clicking the blue box and using the pop-up calendar.)
3. If the note is regarding a particular employee, click **Select** in the Name field and perform a search to correctly enter the name from the search results (this is a function that would normally only be used by a manager).
4. To easily distinguish this note from other notes, in the Subject field enter a descriptive subject.
5. In the Notes field, enter the text of your note.
6. To Print the note, click the **Print** icon (upper left).
7. Click **Save**. You are returned to the Notebook screen and a list of your current notes.
8. For each saved note you, have 3 choices available from the Action dropdown menu:
   View: Access a note to read only (no active fields).
   Edit: Access a note to make changes.
   Delete: Remove a note.
   NOTE: You can also print from either the View or Edit mode.

Use Org Chart

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

1. Click the Org Chart tab above the Home Dashboard. This shows your position information.
2. Right-click on your position box and select Drill Up.
   This displays the next level of the org chart.