

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

### Log On to eNDeavor

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


### Check Your Task List and General Information

1. On the Home Dashboard, look at **My To Do List** for items to be worked on. If you have not reviewed the standard expectations for your position, you will see the open task: *Step 1: Please complete your expectations for the year <your name>*. It will also indicate a status of *Not Started* and a task *Due Date*.

My To Do List			
Action	Task Name	Status	Task Due Date
Do	Step 1: Please complete your expectations for the year, Susan	Started	02/11/2009

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


### Review / Modify Expectations

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

### Review Competencies

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

### Add First Development Activity

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

### Add an Additional Expectation or Development Activity

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

Add other expectations/activities in the same manner.

### Remove an Additional Expectations

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

### Send Expectations/Development Plan to Your Manager

1. When you are satisfied that your expectations and development plan are complete, click the **Send Forward** button at the top of the window.
2. Click **Yes** in the prompt box to confirm that you want to send the expectations and activities forward.
3. In the System Confirmation box, click **Return to Home**.
4. Step 1: task is now removed from My To Do List.

### View Manager Feedback and Modify Expectations/Activities

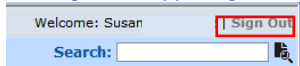
After you "send forward" your expectations, your manager will review them and probably "send back" to you suggestions for changes.

1. Log in to [endeavor.nd.edu](http://endeavor.nd.edu) and access the Home Dashboard.
2. On the Home Dashboard, look at **My To Do List**. You will again see the open task: *Step 1: Please complete your expectations for the year <your name>*.
3. Click **Do** (Action column).
4. In the Feedback/Comments screen, read your manager's comments.
5. At the top of the screen, click the **Expectations** tab (or **Development Plan** tab).
6. Scroll to the expectation/activity you need to modify and edit as necessary.  
**NOTE:** Use the Add and Remove buttons as necessary.
7. When your modifications are done, click **Send Forward** (top of screen).
8. Click **Yes** to confirm send forward.
9. Click **Return to Home**. The Step 1: task has again been removed from My To Do List.
10. If you are done working in eNDeavor, click **Sign Out** (upper right) and close your browser window.

## Sign Out of eNDeavor

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

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

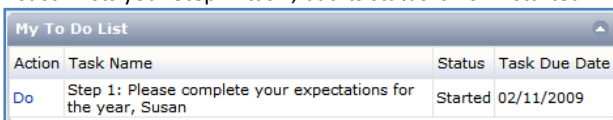


2. Click the **Close** button (red X) to close the browser window.

## Save a Draft of Your Expectations and Development Plan

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

1. Scroll to the top of the Expectations screen and click **Save Draft**.
2. Click **Yes** to confirm save.  
**NOTE:** Though it may appear that nothing has happened, your expectations and development plan draft is now saved.
3. Click **Dashboard** from the Home menu on the left. Your To Do List still lists your Step 1: task, but its status is now "started."



Action	Task Name	Status	Task Due Date
Do	Step 1: Please complete your expectations for the year, Susan	Started	02/11/2009

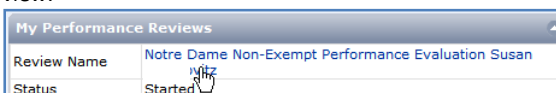
## Resume work on your draft

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

## View Expectations and Development Activities after Sending Forward

If you want to view your expectations and development activities AFTER they have already been sent to your manager:

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



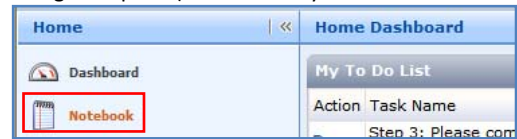
Review Name	Status
Notre Dame Non-Exempt Performance Evaluation Susan	Started

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

## Use the Notebook Tool

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

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

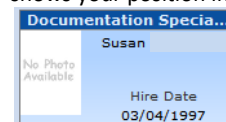


2. To create a new note, click the **New** button. A new note screen opens. The date of entry is already populated with the current date. (This can be changed by clicking the blue box and using the pop-up calendar.)
3. In most cases, leave the Name field blank. Though in the name field you can perform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

## Use Org Chart

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

5. Click the Org Chart tab above the Home Dashboard. This shows your position information.



6. Right-click on your position box and select **Drill Up**. This displays the next level of the org chart.