

Exempt Manager Online Performance Management Review and Approve Direct Report 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.

View Employee's Goals and Development Plan

If a direct report has sent forward goals and development activities for your review, they will appear in My To Do List as an open task.

1. On the Home Dashboard, look at My To Do List. The task:
Step 2: Please review the goals for the year for your employee, <employee's name> will display.



| Action | Task Name | Status | Task Due Date |
|--------|---|-------------|---------------|
| Do | Step 2: Please review the goals for the year for your employee, Susan | Not Started | 02/04/2009 |

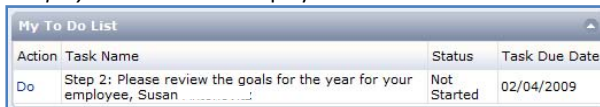
2. Click **Do** (under Action). This takes you to the Overview screen, where the Workflow Graphic indicates you are on *Step2: Manager Reviews Goals* of the 9-step (performance management) process.
3. Click **Goals** tab (top of screen) and scroll to read your employee's goals and their due dates.
4. Click the **Development Plan** tab and review your employee's development activities.

Send Back Feedback Comments

1. To enter and send feedback comments to your employee, scroll to the top of the Goals screen (or the Development Plan screen) and click **Send Back**.
2. Click **Yes** to confirm the send back.
3. In the Feedback Comments box that appears, in the text field enter your feedback.
Example: Goal 1: Change reduction in approval time from 50% to 30%. Development Activity 1: Delete this entire activity.
4. Click **Send Back** again.
5. In the System Confirmation box, click **Return to Home**. The Step 2: Review Goals task is removed from My To Do List.

Approve Employee Goals and Development Plan

1. One the Home Dashboard, look at **My To Do List**. The task:
Step 2: Please review the goals for the year for your employee, <employee's name> will display.



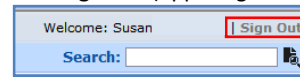
| Action | Task Name | Status | Task Due Date |
|--------|---|-------------|---------------|
| Do | Step 2: Please review the goals for the year for your employee, Susan | Not Started | 02/04/2009 |

2. Click **Do** (under Action). The Workflow Graphic (Overview tab) indicates you are on *Step 2: Manager Reviews Goals* of the 9-step performance management process.
3. Click **Goals** tab (top of screen) and scroll to read your employee's goals and their due dates.
4. Click the **Development Plan** tab and scroll to read your employee's development activities.
5. If you have no comments to send back and wish to approve the goals and activities, click **Send Forward** (top of screen).
6. Click **Yes** to confirm the send forward.
7. In the System Confirmation box, click **Return to Home**. The Step2: Review Goals task is removed from My To do List.

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).

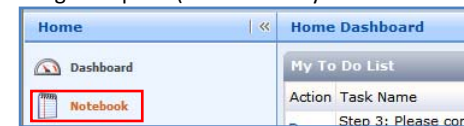


2. Click the **Close** button (red X) to close the browser window.

Use the Notebook Function

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

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



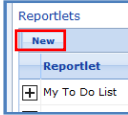
2. To create a new note, click the **New** button.
A new note screen opens. The date of entry is already populated with the current date. (This can be changed by clicking the blue box and using the pop-up calendar.)
3. If the note is regarding a particular employee, click **Select** in the Name field 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.

Customize eNDeavor

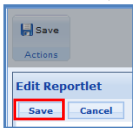
If you are a manager, you can add or remove pre-defined panels (or reportlets) to your Home Dashboard.

To add a reportlet to your Home Dashboard:

1. In the upper right corner of your Home Dashboard, click **Customize**.
2. Click **New** (under Reportlets).

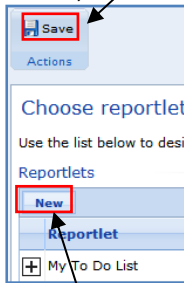


3. In the Edit Reportlet box of the Customize Home Dashboard window:
 - a. From the Reportlet dropdown menu, scroll down the list and select the reportlet you wish to add.
 - b. From the Column dropdown, select the column in which you wish to place the panel (1 for the left side of the screen, 2 for the right side).
 - c. From the Visibility dropdown, select Expanded to view all the contents of the panel.
4. Click **Save** (under Edit Reportlets).



You are returned to the reportlets list. The reportlet you just added will appear at the bottom of the list.

5. At this point, you have two options:
 - a. Click **Save** (at the top of the window) to save the changes to your Home Dashboard (you will be returned to the Home Dashboard where you will see the new panel added at the bottom of the chosen column)



OR

- b. Click **New** and add other reportlets (if you do this, don't forget to click Save at the top of the window when you are done making all your changes).

To delete a reportlet from your Home Dashboard:

1. In the upper right corner of your Home Dashboard, click **Customize**.
2. Locate in the list of reportlet the one you wish to delete and from its dropdown (Action column), select **Delete**.
3. Click **Save** to delete the reportlet and return to your Home Dashboard.

Use Org Chart

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

1. Click the **Org Chart** tab above the Home Dashboard. This shows you and your team of direct reports.
2. Right-click on a position box and select **Drill Up** or **Drill Down** to view the next level.

You can also use the Org Chart function to view the details of your or a direct report's talent summary.

1. Click the **Org Chart** tab above the Home Dashboard.
2. Right-click on the employee's position box in the organization chart and choose **View Personal Profile**.
The Talent Summary window opens with a series of tabs from which you can access information about the employee.