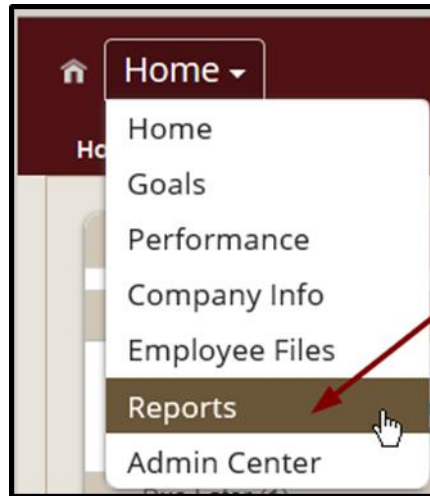


This job guide focuses on **managers viewing performance documents using Reports.**

Access Performance Management by using your Texas State Net ID and password to logon to this site: www.hr.txstate.edu/performance-management/login.html

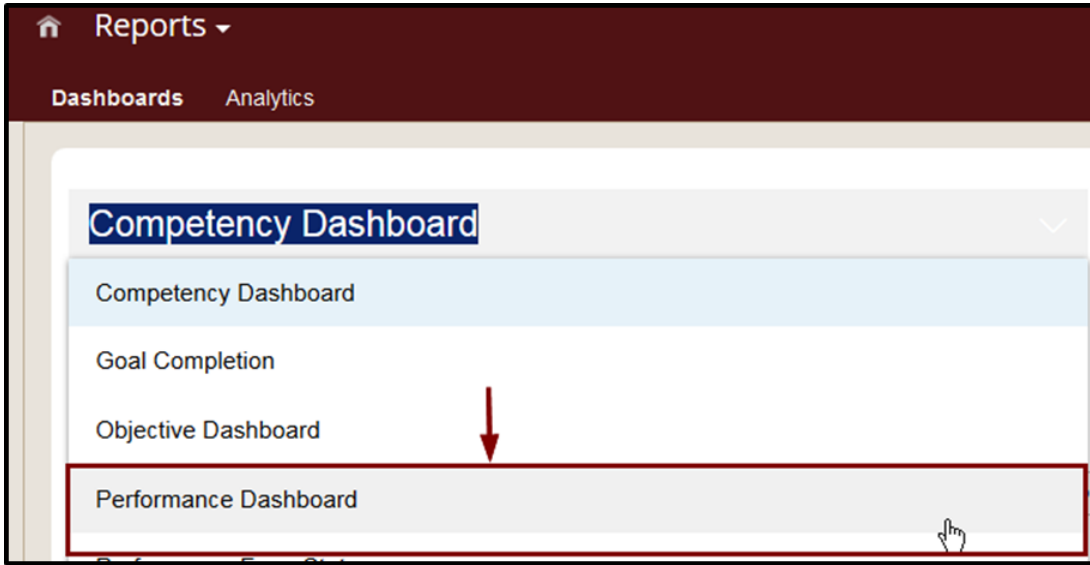
1. To view team planning or performance documents, first select the option "Reports" from the primary menu.



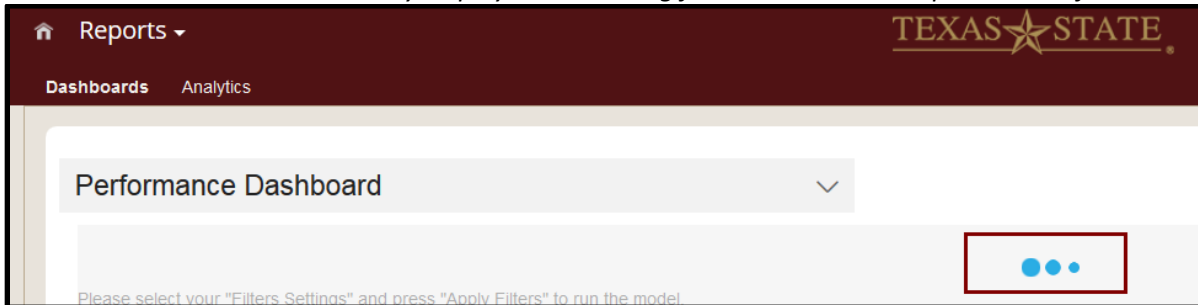
If this is the first time to visit reports, this page will be presented.

A screenshot of the 'Reports' page in the Performance Management system. The page has a dark red header with 'Reports' and 'Analytics' tabs. Below the header is a 'Competency Dashboard' section with various filter settings. The filters include: Report Type (Team View), Starting From (Logged In User), Levels (Direct Reports), Division (All values are selected), Department (All values are selected), Academic College (All values are selected), Datasets (Custom Dataset selected), and Form Template Name (All values are selected). There are 'Cancel' and 'Apply Filters' buttons at the bottom. A note at the bottom says: 'Please select your "Filters Settings" and press "Apply Filters" to run the model.'

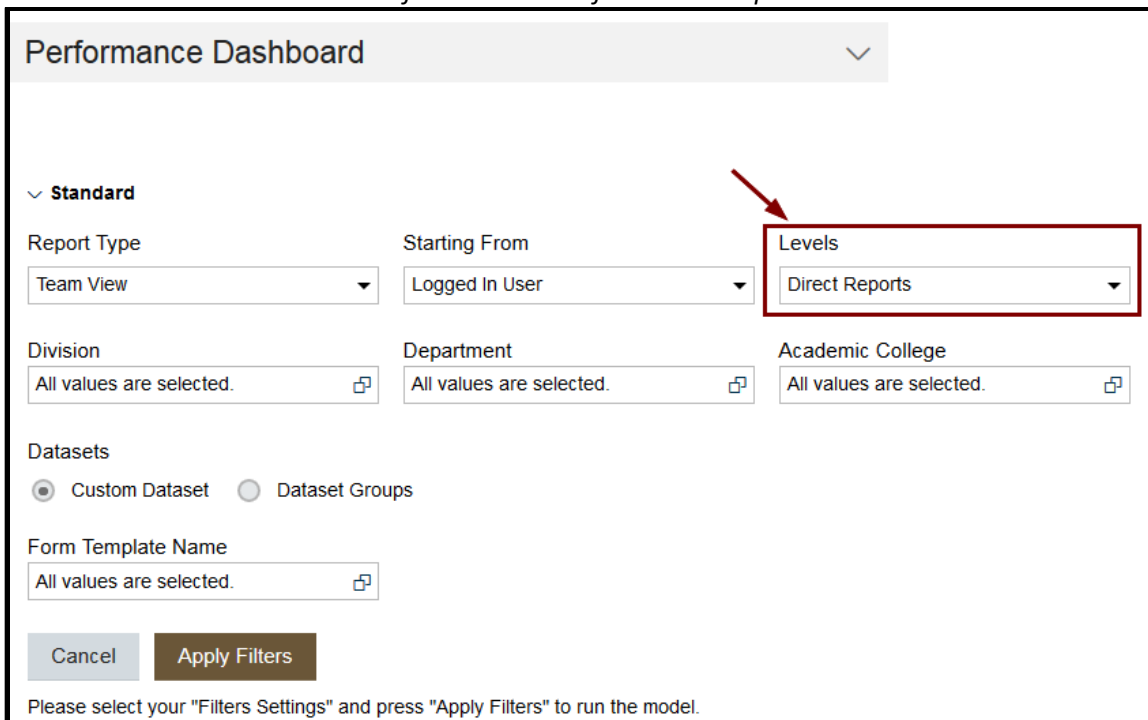
2. Using the drop down box select, the "Performance Dashboard"



These buttons  may display while waiting for the dashboard to present itself.



The default level is set for "Direct Reports".



3. Use the drop down box to select “All Levels” to view all forms for your unit.

Performance Dashboard

Standard

Report Type: Team View

Starting From: Logged In User

Levels: Direct Reports, Level 2, Level 3, Level 4, Level 5, Level 6, Level 7, Level 8, Level 9, All Levels

Division: All values are selected.

Department: All values are selected.

Datasets: Custom Dataset (selected), Dataset Groups

Form Template Name: All values are selected.

Buttons: Cancel, Apply Filters

Please select your "Filters Settings" and press "Apply Filters" to run the model.

4. Next select the document to view. Use the “Form Template Name” dropdown box. Currently the only documents available are the performance planning documents. In April, the performance review documents will be generated and then both documents will be available for view. Select to view the performance management planning documents.

Performance Dashboard

Standard

Report Type: Team View

Starting From: Logged In User

Form Template Name: All values are selected. (1)

Datasets: Custom Dataset (selected), Dataset Groups

Buttons: Cancel, Apply Filters

Please select your "Filters Settings" and press "Apply Filters"

Select All (radio), By My Selection (radio) (2)

Select Datasets Page 1 of 1

- June 2016-May 2017 Performance Management Planning
- June 2016-May 2017 Performance Management Review

Note "All levels" is selected as well as the "Form Template Name", now click "Apply Filters".

Performance Dashboard

Standard

Report Type: Team View

Starting From: Logged In User

Levels: All Levels

Division: All values are selected.

Department: All values are selected.

Academic College: All values are selected.

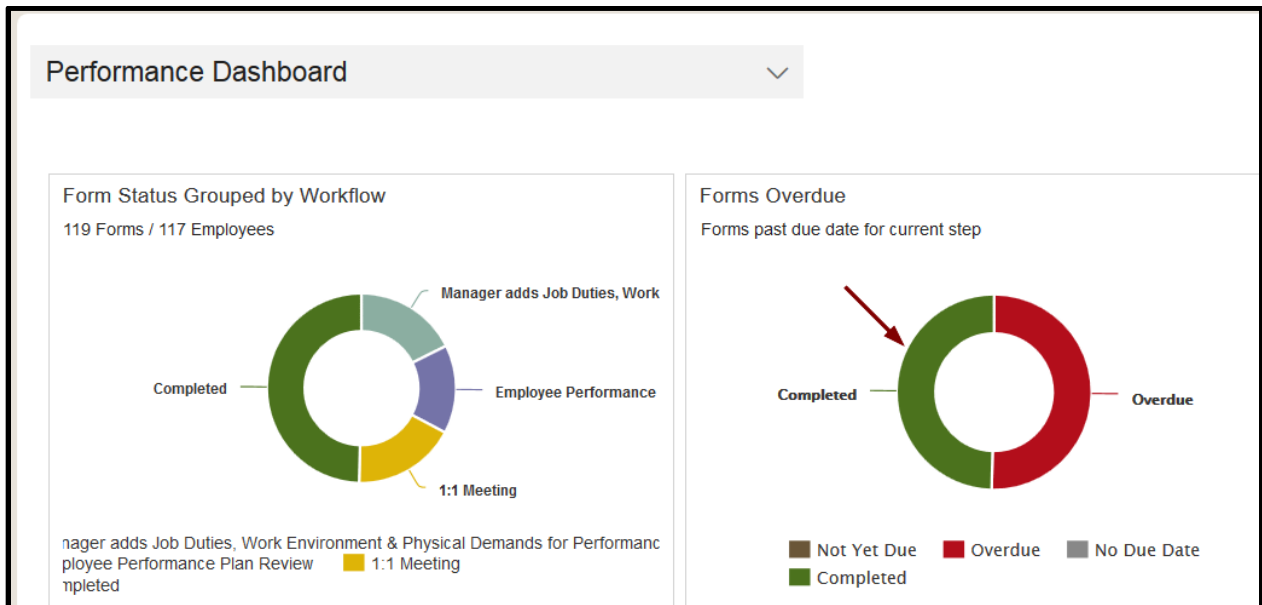
Datasets: Custom Dataset Dataset Groups

Form Template Name: 1 selected

Cancel Apply Filters

Please select your "Filters Settings" and press "Apply Filters" to run the model.

5. Click on the green "Completed" area to view completed forms. Click on the red "Overdue" area to see forms still in progress.



A list of employees will be displayed. Click on the "Document Id" number for to view the performance document.

Subject First Name	Subject Last Name	Document ID
Daniel	Philips	1039
John	Piersol	2138
Andrew	Pilling	1312
Ryan	Pizzi	3013
Ardie	Schneider	1358
James	Schoppe	2004
Barry	Shuler	3652
Jodi	Steen	2116

In a new window the document will be displayed. After review close the window and select another document to review, if desired. Repeat as needed.

TEXAS STATE

June 2016-May 2017 Performance Management Planning for Barry Lyn Shuler

Employee Information

First Name	Barry	Last Name	Shuler
Manager	Joyce L. Munoz	Department	Core Systems (50000056)
Division	Information Technology(1200)	Title	Programmer Analyst II
Academic College	Administration	Middle Name	Lyn
Hire Date	11/09/2009	Email	jm47@TXSTATE.EDU
Job Code	Programmer Analyst II (50007598)	Employee Id	30600
Net ID	bs45		

Performance Goals

Evaluate each business goal established for this review period. Use the comment section as needed to describe performance expectations, how results were measured, and the results that were achieved.

Assessment Definitions:

- *Distinguished - Job performance consistently exceeds expectations; effects measurable and lasting improvements in organizational performance.*
- *Valued - Performs all essential functions of the job effectively;meets or sometimes exceeds expectations. Performance has a positive impact on others.*
- *Needs Improvement - Performance does not consistently meet expectations.*

In selecting to view incomplete/overdue documents, the results will include data that indicates where in the process workflow the document is waiting.

Document ID	Overdue	Current Route Step Name (Locale Specific)
1733		Employee Performance Plan Review
2694		Employee Performance Plan Review
1444		1:1 Meeting
1911		Employee Performance Plan Review
2179		Manager adds Job Duties, Work Environment & Physical I
3238		Employee Performance Plan Review
2612		1:1 Meeting
2649		Manager adds Job Duties, Work Environment & Physical I

This ends the job guide on viewing performance documents. For more training guides go to the Performance Management website at: <http://www.hr.txstate.edu/performance-management.html>