



ACHIEVEonline USER GUIDE FOR MANAGERS

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ACHIEVEonline USER GUIDE FOR MANAGERS

IMPORTANT NOTE: All managers should read the ACHIEVEonline user guide for employees prior to reading this user guide for managers. The information in this user guide builds on the information provided in the employee user guide. Thank you.

As a manager, your login gives you access to information that is not available under a general employee login.

Once you login, you will be taken to your WELCOME page.

The screenshot shows the 'WELCOME TO THE ACHIEVE ONLINE PERFORMANCE CHECK-IN SYSTEM' dashboard. At the top, there is a navigation bar with 'Home', 'Performance', and 'Reports' tabs. Below the navigation bar, there are three main sections: 'MY GOALS', 'QUARTERLY CHECK-IN(S)', and 'USER GUIDE', each with an icon. To the right, there is a 'YOUR CHECK-IN(S)' section with a table of check-ins and their due dates. Below that is a 'YOUR INBOX' section with a notification about pending goal approvals. At the bottom, there is a 'CONTACT' button.

	Due Date
Complete January Manager Feedback of Bob Lee	1/31/2018
Complete January Manager Feedback of Jasmine Orlando	1/31/2018
2018 January Quarterly Check-in	12/31/2017

YOUR INBOX

[Approve Goals](#)
(Your employees have 3 Goals pending approval)

CONTACT

In the main navigation, there are three tab options available to you:

HOME PERFORMANCE REPORTS

In the upper right hand corner of your screen, there is a HELP button that features a robust database of useful information.



WELCOME PAGE

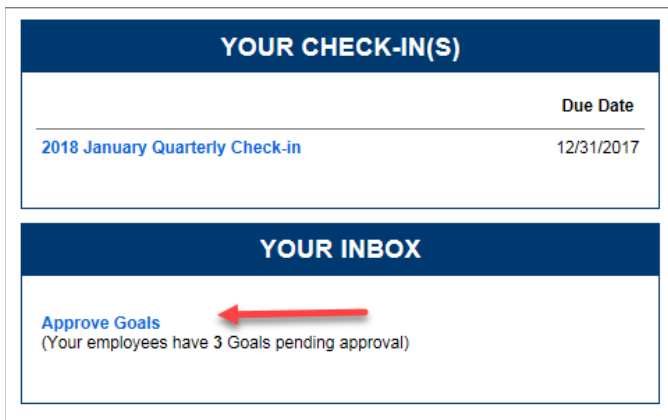
The WELCOME page is your main page and includes quick links to all the important functions of the ACHIEVEonline system:

MY GOALS
QUARTERLY CHECK-IN
USER GUIDE
YOUR CHECK-IN(S)
YOUR INBOX

Return to the WELCOME page any time you need to get your bearings.
In the YOUR CHECK-IN(S) box, you will see a summary of your own check-ins as well as check-ins for all employees who report to you.

NOTE: Your CHECK-IN(S) box displays a maximum of three (3) check-ins. To see all assigned check-ins, click YOUR CHECK-IN(S) on the header of the box.

In the YOUR INBOX, you will see a summary of all goal approval requests submitted to you by your employees.



It is important that as a manager, you check this page regularly since it is the only way for you to know if an employee has created, edited, or cancelled a goal. No email notifications will be sent to you from this system.

One of the first and most common tasks you will complete in the system is to review your INBOX, address INBOX items, and clear your INBOX.

If your employees have submitted goals for your approval, you will see a message that reads: APPROVE GOALS. Click on APPROVE GOALS and you will be taken to the PENDING GOALS page.

On the PENDING GOALS page you will see a summary of all submitted goals.



Pending Goals
 You may individually view the details of each Goals to approve or deny the Goals or you may select a group of Goals to approve or deny all at once.

Include Goals for inactive users

Select	User	Title	Status	Options
<input type="checkbox"/>	Bob Lee	New Goal	Pending Modification Approval	Approve/Deny
<input type="checkbox"/>	Jasmine Orlando	Document, track and drive performance	Pending Modification Approval	Approve/Deny

If you do not need to review a goal prior to APPROVING or DENYING the goal, simply check the box to the left of the employee name and then click APPROVE or DENY at the bottom of the section. Once you do this, the goal will be removed from your INBOX summary.

To review a goal, click the APPROVE/DENY link to the far right of the pending goal you wish to review. You will be taken to an EDIT GOALS page where you can review, edit and approve or deny the goal.

If you click APPROVE, the goal is removed from the PENDING GOALS summary.

If you click DENY, you will see a COMMENTS field where you can explain why the goal was denied.

The user will see the DENIED status on their MY GOALS page. In addition, the employee will be able to read the comment(s) you have entered.

Once you DENY an employee’s goal, that goal is also removed from the PENDING GOALS summary.

If you want to review a goal that you have previously either APPROVED or DENIED, you can see these goals by going to PERFORMANCE/MY GOALS. Click the TEAM GOALS tab, locate the employee, and click the arrow/carrot on the far right to expand the view to all goals. This will show you a full summary of all goals for the employee you have selected.

TEAM GOALS

Access TEAM GOALS by going to PERFORMANCE/MY GOALS and selecting the TEAM GOALS tab. Once in this section, you can view, edit, change start and end dates, copy, view history, etc. The set of functions you can perform on the employee goal is the same set of functions the employee can perform on the same goal. You cannot, however, APPROVE or DENY a goal in this section.



Performance Reports

My Goals Quarterly Check-in

Goals Team Goals

Team Goals

Create Options

My Goals Team Goals

Current Period 10/1/2017 12/31/2017 Search

Display Canceled Hide Completed

All Statuses

Bob Lee ACCOUNTANT 3	47% Complete	Total Weight: 150%	>
Jasmine Orlando ACCOUNTANT 3	39% Complete	Total Weight: 100%	>

All Statuses

Bob Lee
ACCOUNTANT 3

40% Complete Total Weight: 150%

45%	Analyze Budget Activity Status: On Track Due Date: 1/31/2019 Goal Type: Performance Goal Weight: 25%	>
100%	Develop New Financial Reporting Policy for Contracts and Grants Status: Completed Due Date: 12/31/2017 Goal Type: Performance Goal Weight: 50%	>
0%	Document, track and drive performance Status: Not Started Due Date: 10/20/2017 Goal Type: Performance Goal Weight: 25%	>
0%	Earn professional certification Status: Not Started Due Date: 12/31/2017 Goal Type: Performance Goal Weight: 0%	>
50%	* Engagement Plan Status: On Track Due Date: 12/31/2017 Goal Type: Performance Goal Weight: 0%	>
0%	New Goal Status: Pending Modification Approval Due Date: 10/24/2017 Goal Type: Performance Goal Weight: 50%	>
10%	* Update technology documentation each month Status: Not Started Due Date: 12/31/2017 Goal Type: Performance Goal Weight: 0%	>

Jasmine Orlando
ACCOUNTANT 3

51% Complete Total Weight: 100%



45% **Analyze Budget Activity**
Status: On Track Due Date: 1/31/2019 Goal Type: Performance Goal Weight: 25%

Description:
Provide a monthly analysis of budget activity of unit and update unit leader on budget activity and account balances. Develop the report template and use for one calendar year. At the end of the year, determine value of... [read more](#)

Start Date: 11/1/2017

Milestone

Description:	Start Date:	Due Date:	Weight:	Progress:
Develop report template and present to unit leader for approval. This includes identifying pertinent data to... read more	11/1/2017	12/31/2017	10%	100
Run report, conduct analysis, document findings and provide recommendations, if any, on a monthly basis.	1/1/2018	12/31/2018	70%	50

[Show All \(3\)](#)

Attachments

[Choose File](#)

Upload up to 3 attachments. Maximum upload 1mb

Comments

Bob Lee commented 10/20/2017 3:21 PM
Things are going well; however, if we don't get additional resource, may miss important due date.

[Add Comment](#)

[Close](#)

When you have finished completing all actions you wish to perform on a goal, click SUBMIT, and the changes you have applied will be available to your employee(s) from their MY GOALS page. While there is no specific email notice sent to an employee telling them that you have modified a goal, if they notice a change in a goal they can click VIEW HISTORY from the dropdown available for each goal on the far right of the specific goal section, and read what has changed with a goal and who made the change.

We highly suggest that you personally notify an employee of any major changes you make to their goals. This encourages ongoing, casual, in-person communication between you and your employee(s).

In addition to modifying employee goals from the MY GOALS page, you can also monitor progress and/or create a new goal for the employee.

In addition to reviewing, APPROVING or DENYING employee goals, you can also:



VIEW GOALS by time period by setting period start and end dates
DISPLAY CANCELLED GOALS
HIDE COMPLETED GOALS
SEARCH BY STATUS
CREATE A GOAL (for an employee), including CASCADING GOALS

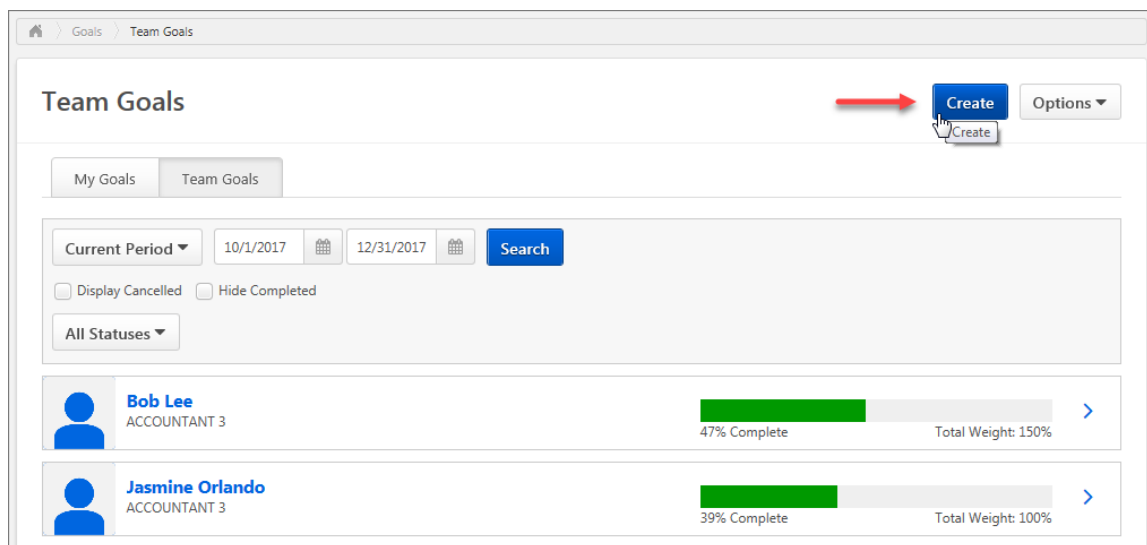
CASCADING GOALS

A cascaded goal impacts the manager's progress. When you cascade a goal to an employee, the employee's progress toward that goal affects your progress towards that goal. If you have multiple employees working on the same cascaded goal, progress by all of the employees assigned to that goal contribute to the overall progress.

CREATE TEAM GOALS

In this section, you can create goals and cascade them to your team. To create and cascade a goal:

1. Click the CREATE button.
2. Enter a title.
3. Enter start and end date.
4. Enter weight (Remember – weight is required by the system but optional in terms of UCI process at this time. You may choose to use the weighting function or not. If you do not want to use the weighting function, enter a value of 0 (zero.) A value must be entered before you can move on in the system).
5. Select goal type.
6. Add milestones, if desired.
7. Add attachments, if desired.



You will then be given the choice of creating this goal for yourself or your team. If you are creating the goal for your team, click the YOUR TEAM radio button. A list of your employees will come up on the page. Select which employee(s) you are assigning the goal to by checking the select box to the left of the employee's name.



Start Date 10/23/2017 **Due Date *** 12/31/2017 **Weight *** 0

Goal Type *
Performance Goal

Milestone
Add Milestone

Attachments
Choose File
Upload up to 3 attachments. Maximum upload 1mb

Assignment *
 Yourself Your team

<input checked="" type="checkbox"/>	Name	Title	Direct and Indirect Reports
<input checked="" type="checkbox"/>	Liz Jones	DIR	
<input checked="" type="checkbox"/>	Bob Lee	ACCOUNTANT 3	
<input checked="" type="checkbox"/>	Jasmine Orlando	ACCOUNTANT 3	

Options
 Create a separate goal for each user.
 All users will share this goal and its progress.

Managed By *
Liz Jones

Cancel Save as Draft Submit

You may also assign the goal to indirect report(s), or ask your employee to assign the goal to their direct report(s).

In the OPTIONS section at the bottom of the ASSIGNMENT section, you must choose either:
CREATE A SEPARATE GOAL FOR EACH USER
ALL USERS WILL SHARE THIS GOAL AND ITS PROGRESS (CASCADED GOAL)

If you choose to create separate goals, each employee will manage the goal assigned to them and that goal will not be connected to you or another employee in any way.

If you choose to create a cascaded (shared) goal, progress towards completion of the cascaded goal is affected by the progress of each individual employee assigned to that goal. In addition, if you elect to cascade (share) a goal, you will be required to assign a manager to that goal in the MANAGED BY field. You may decide to manage the goal yourself or you may want someone else with whom you have shared the goal to manage the goal. You may not assign a manager who is not already sharing the goal. Whomever manages the goal is responsible for editing and updating the goal progress.

If you elect to share a cascaded goal, progress made by employees toward this goal factors into the percent representation calculation that is reflected in the GOAL PROGRESS dial on your MY GOALS page.



Also, if you elect to cascade a goal, employees cannot edit the goal, nor can they enter a progress weight for that goal.

A screenshot of the ACHIEVE online interface showing a goal management page. At the top, a green progress bar is at 50%, with a red arrow pointing to the percentage. The goal title is "* Engagement Plan" (the asterisk indicates it is cascaded). Below the title, the status is "On Track", the due date is "12/31/2017", the goal type is "Performance Goal", and the weight is "0%". A "Progress:" section contains a text input field with the number "50" and a red arrow pointing to it. The "Description:" section contains the text "As a team, we will work to implement the solutions we came up from the Gallup Survey results." and the "Start Date:" is "10/20/2017". Below this is an "Attachments" section with a blue "Choose File" button and the text "Upload up to 3 attachments. Maximum upload 1mb". At the bottom is a "Comments" section with a blue "Add Comment" link.

Once you have assigned the goal either to an individual or to multiple people, you choose:
SAVE AS A DRAFT
SUBMIT

SAVE AS A DRAFT; allows you to save your work and come back later.

Clicking SUBMIT sends the goal to the assigned employee(s) and the goal becomes visible on each employee's MY GOALS page. Cascaded (shared) goals are designated in all MY GOALS views (manager and employee) with an asterisk.

SPECIAL NOTES FOR MANAGERS

Changes made to the MY GOALS page happen in real time, and are immediately visible to both the employee and manager once entered.

You can change the progress status of an employee's goal(s). Likewise, the employee can change the progress status of their goal. If you are disagreeing on the progress status of a goal, please meet with your employee in person to discuss and clarify the situation.

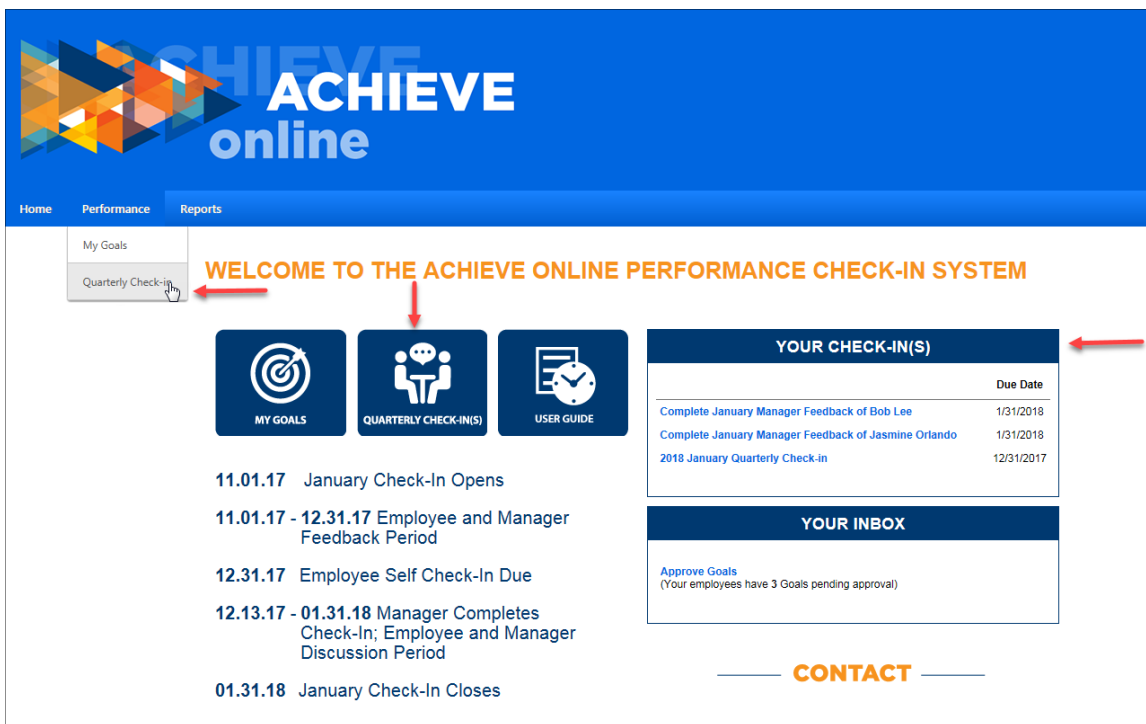


QUARTERLY CHECK-INS

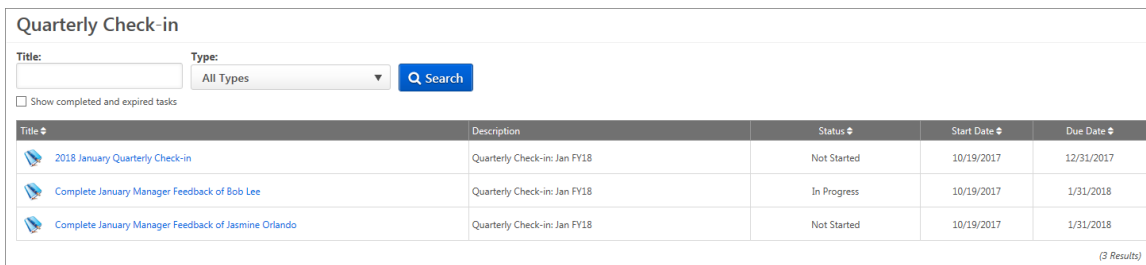
The second function that most managers will use from the WELCOME page is QUARTERLY CHECK-IN(S).

There are three (3) ways to access the QUARTERLY CHECK-IN(S) function:

- PERFORMANCE/QUARTERLY CHECK-IN TAB
- QUARTERLY CHECK-IN(S) BUTTON
- YOUR CHECK-IN(S) BOX



By clicking on either the QUARTERLY CHECK-INS button or any check-in title visible in the YOUR CHECK-INS box, you will automatically be taken to your QUARTERLY CHECK-IN page.



If you use the PERFORMANCE tab, select QUARTERLY CHECK-IN from the dropdown menu and you will be taken to your QUARTERLY CHECK-IN page.



NOTE REGARDING THE SEARCH FUNCTION

The SEARCH function on the QUARTERLY CHECK-IN page is not operable at this time. Our vendor cannot remove the search boxes at this time. We are working to either have the function removed or implement the SEARCH function at a later date. Thank you for your understanding.

Once on the QUARTERLY CHECK-IN page, you can select either your own quarterly check-in or one of your employee's check-ins.

To access the list of all check-ins (including previously completed), click the SHOW COMPLETED AND EXPIRED TASKS checkbox. A list of all check-ins will appear.

You will have access only to your direct reports. If you have employees who have direct reports of their own, you will not see your employee's direct reports check-ins on your page.

Use the QUARTERLY CHECK-IN page to view the status of each employee's check-in, including Not Started, In Progress and Completed.

REMEMBER – if you are completing an employee check-in, you are giving the employee feedback on their goals, and you are responsible for answering question number 5 that applies to managers only. If you are completing the check-in as an employee, you will answer questions one (1) through four (4). Your manager will answer question 5. Employees do not see question 5 in their check-in. Only managers see question 5.

COMPLETING EMPLOYEE CHECK-IN(S)

First, click on an employee check-in to complete. The employee-specific quarterly check-in page will appear, showing employee name, title and check-in period dates.

The screenshot shows a web interface for a "2018 January Check-in" for an employee named Bob Lee. On the left is a navigation sidebar with options: Overview (selected), Goal Feedback, Discussion Questions, Manager Discussion Q..., and Manager-Employee Ch... The main content area has a header "2018 January Check-in" with an "Options" dropdown. Below the header is a profile card for Bob Lee, ACCOUNTANT 3, with a check-in period of 10/1/2017 - 12/31/2017. To the right of the profile is a circular progress indicator showing 25% completion. Below the profile is an "Overview" section with a welcome message and instructions. At the bottom, there is a "Review Step Progression" section with two progress bars: "Employee's Self Check-in" (100% complete) and "Manager Feedback" (100% complete, due 1/31/2018). A "Get Started" button is located at the bottom right.



On this page you will see a progress dial. This dial indicates percent completed on the check-in you are working on only.

Next, either click the GET STARTED button or choose a check-in section to complete using the navigation menu on the left.

In the left navigation, there are four sections:

GOAL FEEDBACK

Use this section to input feedback on the employee's progress towards each goal.

DISCUSSION QUESTIONS

Use this section to input your responses to the four required check-in discussion questions. You should be going in and out of your employee's quarterly check-in on a regular, ongoing basis rather than waiting to provide feedback and answer questions in a single session. Using the ACHIEVEonline application on a regular basis means that you will be ready to submit the check-in form on-time and without spending a lot of time close to the check-in due date.

MANAGER DISCUSSION QUESTION

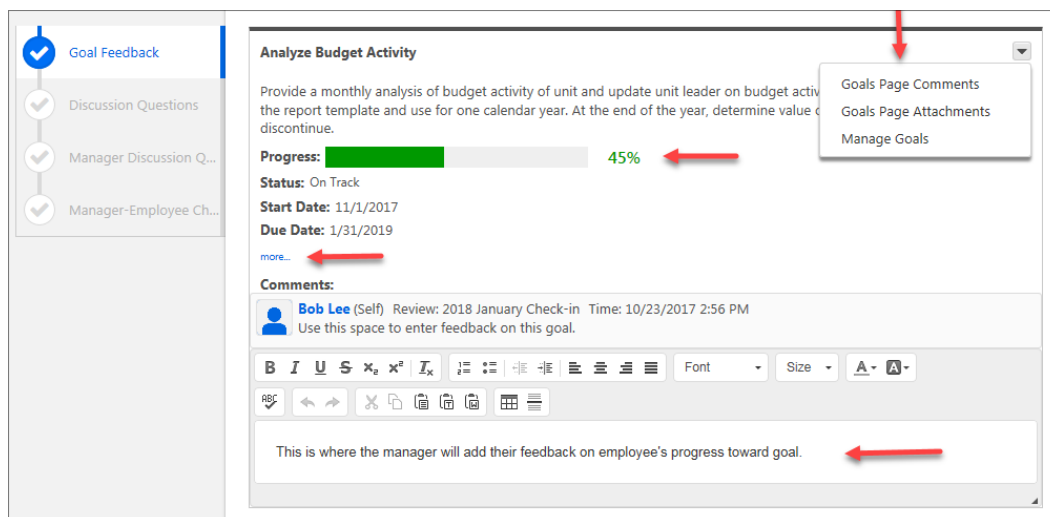
This takes you directly to question 5 in the check-in. Question 5 is for managers only.

MANAGER EMPLOYEE CHECK-IN DATE

Clicking on this choice takes you to the MANAGER EMPLOYEE CHECK-IN DATE, where you can enter the date of the in-person quarterly check-in discussion.

MORE ON GOAL FEEDBACK

The most important function you will complete on this page is entering comments, regarding the employee's goal(s). This is your feedback to your employee.





While on this page, you can also view comments, attachments and /or modify goal progress and/or comments.

You will see a progress bar near the top of each goal section. The color used in the bar corresponds to the colors used for the status indication in the MY GOALS section. To update the progress of a goal, use the MANAGE GOALS option in the upper right dropdown menu. As a reminder, the colors represent the following:

- DRAFT - indicated by the color black
- PENDING - submitted to manager, pending (awaiting) approval; indicated by the color beige
- NOT STARTED - indicated by the color gray
- ON TRACK - indicated by the color green
- BEHIND - indicated by the color yellow
- COMPLETED - indicated by the color blue
- CANCELLED - indicated by the color green (if you cancel a goal the system considers the goal as ON TRACK since you have made the decision to cancel the goal)

Use the MORE link to show milestones (aka tasks) employees have entered for a goal.

When you have finished entering your feedback (comments), and making any changes, e.g., goal progress, choose one of the following actions:

- SAVE AND EXIT; this allows you to save the work you have completed and return at a later time
- SAVE AND CONTINUE; this saves your work and takes you to the DISCUSSION QUESTIONS page
- SUBMIT; this option will appear only after you have completed all check-in requirements; you should choose the SUBMIT function only when you are ready to submit your check-in

DISCUSSION QUESTIONS and MANAGER QUESTION



Use the comment fields to enter your feedback on each of the four required discussion questions, as well as manager discussion question.

When you have finished entering your feedback on each discussion question, choose one of the following actions:

SAVE AND EXIT; this allows you to save the work you have completed and return at a later time

SAVE AND CONTINUE; this saves your work and takes you to the next page

SUBMIT; this option will appear only after you have completed all check-in requirements; you should choose the SUBMIT function only when you are ready to submit your check-in

MANAGER-EMPLOYEE CHECK-IN DATE

Enter date of the in-person check-in discussion with the employee.

When you have finished entering the check-in date, choose one of the following actions:

SAVE AND EXIT; this allows you to save the work you have completed and return at a later time

SAVE AND CONTINUE; this saves your work and takes you to the DISCUSSION QUESTIONS page

SUBMIT; this option will appear only after you have completed all check-in requirements; you should choose the SUBMIT function only when you are ready to submit your check-in

A screenshot of a web application interface. On the left is a vertical navigation menu with three items: "Discussion Questions", "Manager Discussion Q...", and "Manager-Employee Ch...", each with a blue checkmark icon. The main content area is titled "Manager-Employee Check-in Date". Below the title is a text field containing the question: "Liz Jones when did/will you and Bob Lee meet to discuss this quarterly check-in?". Below this is a date selection field labeled "Date of Check-in with the Employee" with a calendar icon and a red asterisk. The date "11/21/2017" is entered. At the bottom right of the form are four buttons: "Back", "Save and Exit", "Submit" (highlighted in blue), and a smaller "Submit" button in a tooltip.

NOTE: Once you click SUBMIT, you will be returned to the QUARTERLY CHECK-IN page.

PREPARING FOR THE IN-PERSON CHECK-IN (PROCESS NOTE)

As a manager, you may elect to submit your check-in input before or after you hold your in-person quarterly check-in discussion with your employee(s). If you choose to share the information you have entered before the in-person check-in, enter the date of your in-person quarterly check-in date (this is a REQUIREMENT), then click SUBMIT. The employee will then see the information you have entered. It is suggested that you print the check-in using the OPTIONS button in the upper right of your screen. Select the PRINT REVIEW from the dropdown menu.



The screenshot shows the "2018 January Check-in" form. On the left is a navigation sidebar with a home icon and a list of items: Overview, Goal Feedback, Discussion Questions, Manager Discussion Q..., and Manager-Employee Ch... (highlighted). The main content area has a header "2018 January Check-in" and an "Options" dropdown menu with a red arrow pointing to it. Below the header is a profile card for "Bob Lee", ACCOUNTANT 3, with dates 10/1/2017 - 12/31/2017. The main section is titled "Manager-Employee Check-in Date" and contains the question "Liz Jones when did/will you and Bob Lee meet to discuss this quarterly check-in?". Below this is a date picker field labeled "Date of Check-in with the Employee" with the date 11/21/2017 and a calendar icon. At the bottom are three buttons: "Back", "Save and Exit", and "Submit" (with a red arrow pointing to it).

NOTE: Sharing the information you have entered with your employee(s) before the check-in gives your employee the chance to review and digest your feedback before the in-person discussion, thereby freeing up discussion time for talking about the most critical goals, addressing specific issues, concerns or planning for future goals and tasks.

If you, as a manager, have changes to the check-in after the in-person quarterly check-in discussion has taken place, you are allowed to make your changes. Go the PERFORMANCE tab, select QUARTERLY CHECK-IN, click the SHOW COMPLETED AND EXPIRED TASKS checkbox, and then select the check-in you wish to edit. Once the information is updated, you must click SUBMIT to re-submit the check-in.

The screenshot shows the "Quarterly Check-in" search form. It has a "Title:" text input field with a red arrow pointing to it, a "Type:" dropdown menu set to "All Types", and a "Search" button. Below the input fields is a checkbox labeled "Show completed and expired tasks" which is currently unchecked. At the bottom, there is a red text warning: "Once a check-in is submitted, it will no longer appear on this screen. You must click the Show completed and expired tasks button above."

If you elect to submit your check-in input after the in-person check-in, click SAVE AND EXIT. To help facilitate your in-person check-in discussion with your employee(s), it is suggested that you print the check-in using the OPTIONS button in the upper right of your screen. Select PRINT REVIEW or PRINT REVIEWEE from the dropdown menu. PRINT REVIEW prints a version that includes all information entered by you and your employee. PRINT REVIEWEE version prints only the information entered by the employee.



Once the in-person quarterly check-in discussion has taken place, be sure to go back into the check-in, make any necessary changes to the information, enter the date of the discussion (REQUIRED), and click SUBMIT.

NOTE: You can go back into the check-in as many times as you wish until the check-in close date.

OPTIONS BUTTON

From the OPTIONS button in the upper right of your screen, you can also:

ADD CO-PLANNERS

ATTACHMENTS

PRINT REVIEW

PRINT REVIEWEE VERSION

ADD CO-PLANNERS

A manager can assign a co-planner. Co-planners can perform check-ins, as though they are the manager. This means the co-planner can enter information into the check-in, and then save, submit and/or print the check-in for use at the in-person check-in discussion.

A manager may want to assign a co-planner if the manager is away for an extended period of time on business travel, out on leave, etc., or the manager may want to assign a co-planner if the co-planner has additional knowledge of the employee's day-to-day goals and tasks. Co-planners cannot create, assign, cascade (share), edit or cancel employee goals. The co-planner is assigned only for tasks related to the quarterly check-in.

ATTACH DOCUMENTS

You may want to attach a document related to a goal or task so that it is readily available for reference.

You can attach up to three documents (up to 1 MB each) to a check-in.

To attach a file, click CHOOSE FILE. Select the document you want to attach, then click OPEN to attach the document.

REPORTING

The third function that managers can access from the WELCOME page is REPORTING. There are two tabs under REPORTING:

STANDARD REPORTS

DASHBOARDS



Home Performance **Reports**

- Standard Reports
- Dashboards

WELCOME TO THE ACHIEVE ONLINE PERFORMANCE CHECK-IN SYSTEM

MY GOALS

QUARTERLY CHECK-INS

USER GUIDE

11.01.17 January Check-In Opens
11.01.17 - 12.31.17 Employee and Manager Feedback Period

YOUR CHECK-IN(S)	
	Due Date
Complete January Manager Feedback of Bob Lee	1/31/2018
Complete January Manager Feedback of Jasmine Orlando	1/31/2018
2018 January Quarterly Check-in	12/31/2017

YOUR INBOX

STANDARD REPORTS

The following reports are available as standard reports within the ACHIEVEonline system. For more information on these reports click HELP at the top right of the screen and the STANDARD REPORTS OVERVIEW page will appear. Then select PERFORMANCE/GOAL REPORTS or PERFORMANCE REVIEW REPORTS, and then the title of the report.

- Goal Details
- Goal Exception
- Goal Hierarchy
- Goal Progress
- Goal Status
- Goal Target
- Goal Tasks Summary
- Performance Review
- Performance Reviews Details Report
- Performance Step Status Report
- Task User Status

Home Performance **Reports**

Reports

Click on a report category to view those reports. You may search for any reports by title or description.

Performance

<p>Goal Details Displays the details of each goal during a specific period for a single user where the user is the goal owner.</p>	<p>Goal Tasks Summary Displays details of all tasks contained inside of goals for a specific user or OUs.</p>
<p>Goal Exception Displays all users who do not have approved goals within the selected time criteria.</p>	<p>Performance Review View a performance review for a single user.</p>
<p>Goal Hierarchy Displays a detailed view of the hierarchy of one or more goals for a specific user.</p>	<p>Performance Review Details Report Define a date range and print one or more performance reviews for a single user.</p>
<p>Goal Progress Displays the progress towards goal completion for a specific set of users.</p>	<p>Performance Review Distribution Search for a specific review task and optionally set user criteria to display a distribution report.</p>
<p>Goal Status Display a summary of goal statuses for a specific set of users.</p>	<p>Performance Review Step Status Report View the status of all steps in a Performance Review task.</p>
<p>Goal Target Displays the details of all targets contained inside of goals for a specified user.</p>	<p>Task User Status Displays the status of 1 or more tasks for any organizational unit</p>



VIEW DASHBOARD

The dashboard has been prepared and organized to show only reporting on the functions we are actively using as an organization at this time.

You can click on VIEW DETAILS to get more information on any report view.

QUARTERLY GOAL STATUS

Provides an overview of status of all goals for you and your employees.

QUARTERLY TASK STATUS

Provides an overview of the status of all tasks for you and your employees.

NOTE: To refresh your dashboard in real time, select the dropdown indicator that appears when your mouse is in a particular view window, e.g., QUARTERLY GOAL STATUS or QUARTERLY TASK STATUS. When the dropdown choices appear, select REFRESH.

You can also refresh and print the dashboard view using the OPTIONS dropdown in the upper right of the screen.

QUESTIONS, CONCERNS & COMMENTS

Please direct questions, concerns and comments to your Human Resources Business Partner (HRBP) or email achieveonline@uci.edu.