## Introduction to Halogen Performance™ for New Administrators: Agenda

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<th>Topic</th>
<th>Description</th>
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<tr>
<td><strong>Introduction</strong></td>
<td>• Introduction and objectives</td>
<td>5 min.</td>
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<tr>
<td><strong>Welcome to Halogen Performance™</strong></td>
<td>• Halogen resources</td>
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<tr>
<td><strong>What is a process?</strong></td>
<td>• 5 elements that make up a process</td>
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<td><strong>End User vs. Administrator side</strong></td>
<td>• End User vs. Administrator side overview</td>
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<td><strong>End User side overview</strong></td>
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<td>• TalentSpace tab</td>
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<td>• Options tab</td>
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<td><strong>Common Administrator tasks and troubleshooting</strong></td>
<td>• Common scenarios</td>
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<td><strong>Reporting overview</strong></td>
<td>• Accessing reports</td>
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<tr>
<td><strong>Wrap-up</strong></td>
<td>• Summary / Q&amp;A</td>
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# Introduction to Halogen Performance for New Administrators’ Toolkit

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<td>• User Center - User Import Excel Spreadsheet</td>
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<td>• Pre-launch Checklist</td>
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<td>• Types of Reports</td>
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<td>• Making the Most of Your Status Report</td>
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<tr>
<td>• Using Reports to Manage Your Appraisal Process</td>
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Today's session

Agenda
• Welcome to Halogen Performance™
• What is a process?
• End User side overview
• Administrator side overview
• Common Administrator tasks and troubleshooting
• Reporting overview
• Wrap-up

Welcome to Halogen Performance™

Objectives
• Provide a high level overview of the End User and Administrator sides within Halogen Performance to increase familiarity with the product
• Identify common tasks that Administrators perform within Halogen Performance
• Highlight helpful resources that will ensure that you are successful in your role
Halogen resources

People
- Customer Support 24/7 support@halogensoftware.com
- Customer Success Managers (CSMs) formally known as Customer Account Managers (CAMs)
- Implementation Consultants (ICs)

Online Resources
- Online Help within the product
- Customer Success Portal
- Halogen Learn
- Halogen Champions HQ

Other Resources
- BrightLights Newsletter
- Training Solutions
- Halogen Customer Conference (HCC)

5 Elements that make up a process

- Timeline: A start and end date
- Steps: A set of tasks for users to perform (workflow)
  - Different types
  - Prerequisites
  - Conditional approval
  - Cancelling steps
  - Bypassing steps
- Form: A form to capture information
  - Fields
  - Scored or open-ended
  - Comment helper
  - Spell check
  - Annotations
  - Library
- People: People to participate
- Notifications: Reminders of upcoming and overdue tasks
  - Dates and times
  - Automatic and individual reminders

Process types

- **All appraisals conducted at the same time (Focal Review)**: Typically used for Onboarding or Interim Reviews
- **Scheduled**: Smaller assessments conducted by the project/team lead
- **Anniversary**: Smaller assessments conducted at different times depending on when employee was hired, promoted, or last appraised
- **Interim**: Storage area for forms, goals, and development plans
End User side

- Used by managers and employees to participate in processes
- Access performance records (appraisals, journal, goals, development plans, and reports)
- Your company logo appears in upper left

https://global.hgncloud.com/dunrite/welcome.jsp

Administrator side

- Used by Performance administrators for configuration
- Generate some reports on processes in progress and completed
- The Halogen logo appears in the upper left

https://global.hgncloud.com/dunrite

End User side overview

Manager Home Page

Employee Home Page

Manager Home Page tour
Administrator side: TalentSpace tab

- Initiate a new workflow
- Track employee progress
- Follow up
- Gather metrics

Allows you to
- View modules, processes, and libraries
- Manage processes
- View process details and status

Accessing libraries / templates

Halogen Performance Form Library

- Set of forms describing form creation tips, sample forms for different types of processes, and sample form styles

Appraisal processes

- Properties
- Participant Center
- Notification Center
- Report Center
Administrator side: User Center tab

Allows you to

• View, manage, and maintain employees in your organization who will participate in any employee performance and talent management related processes

• Group employees
• Add users
• Transfer user data
• Customize fields
• Assign access
• Define access

User Center vs. Participant Center

User Center

• Storage house for everyone who ever has or ever will use the Halogen system
• Where users are added initially
• Manager, HR Rep, and Career Coach relationships established here

Participant Center

• Contains all users that will participate in the process
• Participants are added from the User Center as needed
• Participants are added with their manager hierarchy and HR Rep from the User Center
Administrative roles

Super User
• Full access to all processes and data
• Assigns roles, access, and privileges
• Usually an HR employee

Administrator
• Can create new processes
• Access to processes they created or have been given access to, including employee information
• Usually an HR employee

HR Administrator
• Automatically assigned into a process
• Limited (configurable) access to processes, participants, and employee information

Administrator side: Options tab

Allows you to
• Customize the interface, maintain security and server configurations, notifications, status definitions, time zones, various lists, license reports, and custom dictionary configurations

Common Administrator tasks and troubleshooting

Scenarios
1. Managing the User Center and a live process
2. Duplicating an existing process and preparing for launch
Job Aid: Accessing Reports, Making the Most of Your Status Report

**From the End User side, in the Reports area:**
- Access reporting from three locations.

**From the Administrator side within the TalentSpace tab, the Report Center:**
- And within the User Center tab, in the Employee Development History.
Wrap-up

• Keep in mind
  • Resources available to you
  • What Halogen Performance can do
  • 5 elements of a process
  • End user side options
  • Administrator side design
  • Various areas to access data for reporting

• Q&A

• Next Steps
  • Review the Job Aids in your Toolkit
  • Contact your Customer Success Manager (CSM)
  • Explore the resources available to you

Thank you!
The Halogen TalentSpace offering is more than just our software suite of modules and it extends beyond our wide array of professional and consulting services. Halogen offers a plethora of additional essential resources that will help ensure you get the most out of your Halogen experience, along with a massive and engaged customer community for you to leverage.

This guide gives you a glimpse of the many essential resources you should be tapping into as you look to expand your talent management journey with Halogen.

These include:

- **Expert resources and content**
- **Massive, vibrant community**
- **Unparalleled services**
Expert resources and content

Our people
Let’s start by looking at the Halogen team-members who are responsible for helping you achieve your success outcomes!

Customer Success Managers (CSMs)
Your Customer Success Manager (CSM) is responsible for your overall relationship with Halogen Software. Your CSM is here to help you access all the resources and services available to you, and help you achieve your talent management and business outcomes.

Implementation Consultants (ICs)
Your Implementation Consultant will be your guide through your Halogen TalentSpace™ Initial Launch. They will lead you through a deliberate setup while presenting best practices and industry-specific trends. Their product expertise will come in handy to ensure your first introduction to the Suite is smooth and well thought through.

Talent Management Consultants (TMCs)
Your Talent Management Consultant is an experienced HR professional who will help you advance your talent management initiatives, provide recommendations to optimize your processes, and help ensure you continue to use your talent to achieve exceptional outcomes.

Shared Services Support
No one knows the product like these folks. Our customer support experts are standing by. Phone and email support is available 24x7.
Let us know how we can help!
Email: support@halogensoftware.com
North America: 1 662 270 8412
Australia: 1 800 095 990
International: CC + 1 613 591 5500

Online Help
Whether you’re an Administrator or an End User, the Online Help within Halogen Performance offers comprehensive information at your fingertips.
The Halogen Customer Success Portal provides customers with the ability to submit tickets and track their status 24x7. It also provides customers access to our rich product knowledge base, user and administrator guides, training videos, templates, release notes, and more.

You can request a new account on the home page, and you will be sent your login details.

Be sure to sign up and bookmark this page! [http://support.halogensoftware.com](http://support.halogensoftware.com) You can also access the site on the Halogen webpage.

**Home**
The Home Page is your direct link to search articles, access your support tickets and resources and see a list of the most popular knowledge base articles. You can create a support ticket, review the top articles and search the portal using key words.

**Knowledge Base**
The Knowledge Base page allows you to search for articles and view a list of the five most popular articles for each knowledge category. You can subscribe to articles to become alerted if or when they are updated.

**Product Updates**
Links to product update documents organized by version number. Includes What’s New documents and product release information.

**Training- Admin**
Administrator Training area with information on our post implementation training services including links to: short video tips, and training videos.

**Training- Manager**
Manager and Employee Training area with information on our post implementation training services including links to: short video tips, and training videos.

**Champions HQ**
We have a large and growing community of users. You can access our community from this link, which will direct you to our Halogen Champions HQ community…learn more on this further below…

**My Support**
My Support is where you can manage and view all your information and activity.

- **My History:** See and access your most recent tickets and email messages.
- **My Tickets:** Search and review all your current and past tickets.
- **My Profile:** Update your personal profile and change your password.
- **My Subscriptions:** View and access the knowledge base topics to which you have subscribed.
- **My Emails:** Search and review all your past emails.
Massive, vibrant community

Halogen Champions HQ  http://www.halogenchampions.com/join/bebrilliant
Any customer responsible for managing their Halogen TalentSpace needs to be a member of the Halogen Champions HQ. Make sure you register and participate in the user community and take part in the Champions HQ challenges.

What is the Halogen Champions HQ?
It’s an online environment for our customers where they can interact with each other and the Halogen team. Through this environment customers can share best practices, engage in meaningful product and industry related discussions, learn about upcoming Halogen news and self-identify themselves for customer marketing activities (case studies, news releases, testimonials, referrals, etc.). The community section houses the Q&A forum as well as the upcoming and past event forums and other useful resources!

How it works
Once you join Halogen Champions HQ, you can complete simple activities (we call them ‘challenges’) to earn instant points. The more activities you do, the more points you earn, and the higher you climb up the leaderboard. Challenges will help you grow your knowledge of the Halogen TalentSpace, HR best practices, entertain you or get you more connected with the user community.

You’ll be recognized for your efforts and you can redeem points earned for some great rewards, such as:

- Gift cards
- Charitable donations
- Free training and services
- And other cool experiences

Make sure you sign up and get involved!
Halogen User Group (HUG) Meetings
Halogen User Group meetings are events arranged by Halogen but hosted by Halogen customers for Halogen customers. They are a great way for customers to share best practices, experiences and network with other industry peers.

These events receive fantastic reviews from customers who come away learning about new things they can do with Halogen while meeting many Halogen peers in their city. Here is just a sampling of the great feedback we receive on these events:

"My first HUG, and it was a very rewarding experience."
"I learned quite a lot about features that are included with our licensed application. Looking forward to trying them."
"The interaction with other customers is priceless."

These meetings take place throughout the year and at customer sites around the globe- and better yet, there is no charge to attend!

To learn more about them and see what events are coming up visit the HUG registration page: http://www.halogensoftware.com/company/events#customer or visit the upcoming events section of the Halogen Champions HQ community.

Halogen Customer Conference (HCC)
This is a must attend event for HR professionals. Each year hundreds of Halogen customers meet to participate in a variety of workshop sessions on talent management best practices, HR strategy and product tips and tricks. There are also optional training courses and bootcamps, as well as plenty of networking opportunities and our global Halogen User Group meeting. Not to mention our epic Customer Appreciation Party!

Be sure to plan to attend our next Customer Conference. Talk to your Customer Success Manager for more information.

Customer value

"I enjoyed both the mix of speakers and the focus on topic areas that are key for HR professionals. I valued meeting the impressive Halogen team and the many opportunities for professional networking."

Nicole Trappaso, CPP
Halogensoftware.com
The Halogen website offers a wealth of information.

HR Resource Center
http://www.halogensoftware.com/learn

Whether looking for inspiration on industry best practices, 3rd party reports, whitepapers, webinars, videos, ebooks or the like, be sure to check out the Halogen HR Resource Center on our main website.

Many people overlook our website, which offers countless resources to help keep you in the know. Also subscribe to follow the Halogen TalentSpace Blog, where you will hear the latest thinking on how to build a world class workforce!

Explore of vast library of talent management resources, such as:
- Forms and templates
- How Tos
- Infographics and Charts
- Videos
- Webinars
- White Papers and eBooks
- And more…

TalentSpace Blog http://www.halogensoftware.com/blog

Check out the Halogen TalentSpace Blog for the latest thinking on how to build a world class workforce in the areas of performance management, leadership, engagement, learning, talent acquisition, career management, communication, and more.
BrightLights Newsletter

BrightLights is Halogen’s monthly customer newsletter. This is a must read to find out information on product updates, tips and tricks, HR best practices, upcoming events and more!

To ensure you are receiving our newsletter and other Halogen customer communications, be sure you have ‘whitelisted’ Halogen to ensure our emails get past your firewall.

You can also refine your email preferences by visiting our email preference center here to make sure you are getting the communications you want.

Unparalleled services

Proven through thousands of client relationships, our services are designed to help you build your world class workforce by successfully implementing your talent management software, providing stellar support to your HR team and advancing your talent management strategies well after your initial deployment.

Some of our services include:

● Implementation & Support
● Continuous Advancement (CA)
● Business Consulting
● Training

http://www.halogensoftware.com/services

Contact your Customer Success Manager (CSM) to learn more about services to help you achieve your talent management and business outcomes.
Configuring Home Page Options

Job Aid

At the core of the Halogen TalentSpace suite is the Options tab. You can customize the interface, maintain security and server configurations, notifications, status definitions, time zones, various lists, license reports, and custom dictionary configurations.

With the Options tab, there are two areas to configure what appears on the Home Page.

1. **User Interface**

   The **Home Page Options** area controls whether end users have access to their Mini Profile, the Talent View, Activity Tracker, and the Job Description Repository from the Home page.

2. **End User Interface**

   Administrators can add up to 100 **External Links** to web pages on the Employee’s Home page. For example, you may want to add links to your organization’s Web site, your policies and procedures, or organization chart.
The **Mini Profile** is a collection of employee data. Depending on how your organization implements the profile, this data may include an employee photo, job title and contact information, employee's manager or HR Rep, employee education, internal and external work experience, and so on.

You can allow certain roles to see and use the **Talent Search**. Talent search is a method of searching the contents of talent profiles to identify candidates for open positions, fill talent pools, find resources for projects, and so on. Once you have completed your search, you can compare up to ten profiles at a time, and you can add candidates to job requisitions.

The **Talent View** gives you two ways of viewing information about employees in your organization. In Talent View, you view employees in a list or in chart view. You can hide the Talent View from employees, show just the list or show both the list and the chart. You can set it up so that only administrators can see the chart. When you look at the Talent View, any employees who do not have a direct manager are displayed at the top.

The **Activity Tracker** alerts users to changes made to their Employee Records, such as changes to their Goals, Development Plans, and so on. By default, all updates to Employee Records appear on the Activity Tracker. However, users can configure the Activity Tracker to best suit their needs.

The **Job Description** repository presents users with a list of all published job descriptions that may be assigned to employees and are ready for use within the organization. Users with permissions can search, view, print, and export job descriptions from the repository. This feature is only available when Halogen Job Description Builder is licensed.
If you choose to include **External Links**, these links will be added to each employee’s Main Page under the Additional Resources as links to external web-based systems or web pages in your organization’s intranet. The links are the same for all users. Empty links will not be displayed.
All employees are entered into the User Center as end users and may be assigned roles.

User Center

End Users can be assigned roles, allowing them to access elements of Halogen Performance™ and selected user information.

Super User
- Access to all processes and user information

Administrator
- Create and access processes and associated user information

Manager
- Manages direct reports
  - Write and review appraisals

Manager (Higher Levels)
- Manages lower levels of management
  - Perform tasks and sign-off

Project Leader
- Evaluates project team
  - Same activities as a manager

HR Representative
- Assigned to a process
  - Assign forms, select direct reports, review and sign-off

Participant
- Employee being evaluated
  - Complete self-appraisal; Personal Pages, Journal Notes

Some roles have configurable privileges

Once added to a process, an End User may be assigned a role within the process’s Participant Center.

Administrative and coaching roles are assigned in the Role Assignment area.

Configurable Privileges
- Organization Coach
  - Access to all users and end user side records except within their own department

- Career Coach
  - Access to assigned employees and end user side records

- HR Administrator
  - Automatic access to processes; limited access and permissions to those processes and users
User Center vs. Participant Center

Job Aid

New administrators will sometimes confuse the **User Center** and the **Participant Center**. Remember that the **User Center** stores information on every single person who has access to the module. The **Participant Center** only stores the users who are expected to participate in a particular process. You can only have one **User Center**, but you can have multiple **Participant Centers** in the module.

<table>
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<tr>
<th>Who is included?</th>
<th>User Center</th>
<th>Participant Center</th>
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<tbody>
<tr>
<td><strong>All of your employees and managers (or, at the very least, all those who ever have or will participate in an appraisal process, as well as anyone who has access to the admin side of the module)</strong></td>
<td><img src="image1" alt="User Center Image" /></td>
<td><strong>Only those employees and managers that will participate in the given appraisal process</strong></td>
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<table>
<thead>
<tr>
<th>What information is available / configurable?</th>
<th>User Center</th>
<th>Participant Center</th>
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<tbody>
<tr>
<td><strong>User list</strong></td>
<td><img src="image3" alt="User list Image" /></td>
<td><strong>Participant list</strong></td>
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<tr>
<td><strong>Personal information</strong></td>
<td><img src="image4" alt="Personal information Image" /></td>
<td><strong>Form assignments</strong></td>
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<tr>
<td><strong>Job information</strong></td>
<td><img src="image5" alt="Job information Image" /></td>
<td><strong>Process status</strong></td>
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<tr>
<td><strong>Manager, HR rep, career coach assignment information</strong></td>
<td><img src="image6" alt="Manager assignment Image" /></td>
<td><strong>Completed review forms</strong></td>
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<tr>
<td><strong>Group assignment</strong></td>
<td><img src="image7" alt="Group assignment Image" /></td>
<td><strong>Manager and HR rep assignments</strong></td>
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<tr>
<td><strong>Custom details</strong></td>
<td><img src="image8" alt="Custom details Image" /></td>
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What actions can I perform?
- Add/remove users from Performance
- Grant/revoke access rights
- Assign manager, HR rep and career coach
- Configure access permissions for HR Admins
- Create groups
- Assign users to groups
- Search for users
- Add/remove attachments
- Activate/deactivate users within Performance
- Generate new user passwords
- Add/remove participants from the appraisal process
- Assign roles (HR rep, manager/evaluator, employees to be evaluated)
- Create groups
- Assign users to groups
- Assign manager, HR rep to participants
- Update relationships (from User Center)
- Update group assignments (from User Center)
- Assign third party approver (if applicable)

What is the scope of the changes? (Applicable to Relationships and Grouping)
- Applicable to all subsequent processes.
  For example, in the User Center, if you change Julie's manager from Sam to Jessica, Jessica will appear as Julie's manager in all future appraisal processes.
- Applicable only to the process in which the changes were made.
  For example, in the Participant Center, if you change Julie’s manager from Sam to Jessica, Jessica will appear as Julie’s manager only for the current appraisal process. In the next appraisal process, Julie’s manager will revert to Sam.

*Note: When relationships are defined in the User Center, the relationships in the Participant Center will not override access rights. In the example above, where Julie’s manager has changed from Sam to Jessica in the Participant Center, Jessica will perform all of the relevant manager related tasks, but Sam will maintain visibility into Julie’s personal pages, since Sam is still the manager assigned in the User Center.
**Halogen Performance™ Administrator FAQ Job Aid**

**Process**

**How do I rollback a step?**

1. Locate the process in the TalentSpace view, and then click the Process Details.
2. Select Participant Center → All Participants link. This window has three columns; Participant, Assigned, and Appraisal.
3. Within the Appraisal section, find the employee who is being evaluated, and then click the Status link. The Individual Appraisal Status window will open.
4. Select the radio button beside the step that needs to be Set to In Progress, and then click the Rollback Status button.
5. Click OK.

*Only steps that included editing the appraisal can be rolled back.*

For example, a “Manager meets with Employee” step cannot be rolled back. The process would have to be rolled back to the last authoring step.

You can choose whether or not to delete response data that has been entered for that particular step.

If you want to delete response data, select the applicable checkboxes. Otherwise, click the Rollback Status button and the status will be rolled back.

**How do I mark a step as complete for one person?**

It may be necessary to mark a step complete if a participant is unable to complete a step due to time constraints or if the step is not applicable.

1. Follow steps 1-3 from How do I roll back a step?
2. Click the Complete button beside the step you want to complete, or click the Complete All button if you want to mark all steps complete. You will then be asked to confirm the mark as complete.
3. Click OK in the pop-up window.
4. Click OK in the Individual Appraisal Status window.

*An icon will appear indicating that the step has been marked completed by Administrator.*

**How do I extend the end date for a process?**

1. In the TalentSpace view, click Process Details for the process.
2. In the Process Dates section, click the calendar icon and change the Entire Process Ends date.
3. Click Save Changes.

**What is the prerequisite and how does it work?**

If an appraisal step has a prerequisite it means that step cannot be started until the prerequisite step has been completed. If there are two prerequisite steps, then both steps must be completed for the next step to be started. Configure appraisal prerequisite steps within the Appraisal Step Options.

**How do I open a process and what should be checked and reviewed before opening a process?**

*Prior to opening a process *for a more detailed list, please see the pre-launch checklist:*
1. Review the steps, due dates, and prerequisites.
2. Ensure all necessary forms have been added to the forms area.
3. Ensure all necessary participants have been added to the Participant Center and have been assigned a form.

Once the process has been checked and reviewed:

1. Locate the process in the TalentSpace view, click Open under the Process Details link.
2. Click Open from the Properties > General page.
3. Click Open in the pop-up window.

*The status of the process will show as In Progress.*

*If the start date is in the future, the status will show as Open on Start Date.*

**How do I copy/duplicate a process?**

1. Locate the process in the TalentSpace view, click Duplicate located below the process End Date.

*The Duplicate Process - General window will open.*

2. Description info must be entered such as; title, start and end date.
3. There are four options regarding other items to duplicate.
   - **None:** appraisal steps, forms, notification settings, and user interfaces (most recommended)
   - **Participants:** participant list and participant roles
   - **Participants and Forms Assignments:** participant options and all the form assignments
   - **Participants, Forms Assignments, and Optional Competencies Assignments:** -all the participant options, form assignments, and optional competencies
### How do I pre-fill a past goals section with goals set in a previous form?

1. In the Properties section of an appraisal process, click the Forms link, and then select a form by clicking on its title.
2. Click on the Form Sections link, located in the left menu.
3. Click the link to the Past Goals section (this may be re-titled depending on your setup).
4. Ensure the following checkbox is selected. ![Enable pre-filling of past goals from another process]
5. Click the Options button. 
6. From the Pre-filling Options window, select the criteria from the options provided.
7. Select the type of goal to be pulled in (either new goals or past goals).
   - Typically, it is a new goal (these goals were new at the time of using that form, but for the current form, employees will be rated on their accomplishments of those goals).
   - If unsure of what type of goal (new or past), click the Select specific forms/sections to pull from, and select the specific goal sections.
8. Click OK.
9. Click OK in the Form Section Options window.

### How do I add Comment Helper text to a competency?

1. In the Properties section of an appraisal process, click Forms, and then select a form by clicking on its title.
2. From the Form Properties window, ensure that Enable Suggested Comments is selected under Options.
3. Click Form Sections and click on a specific competency. The Edit Competency window will open.
4. From the left menu, click Categories under Suggested Comments.
   - The Suggested Comments Categories window for that specific competency will open.
5. Click the Add Category button or an existing category title. Edit Comment Help for that specific competency will open.
6. In the Category section, enter or change the title.
7. In the Suggested Comments section, click the Add button to add comment help text.
   - If you wish to have X suggested comments, click the Add button X times.
8. In the text field box, type the suggested comment.
   - Comments should be listed from most favorable to least favorable.
   - If the feminine text is not specified, the masculine text will be considered as unisex.

### How do I copy a form?

Copying a form can save a lot of time if multiple forms are essentially the same with just a few changes.

1. In the Properties section of a process, click Forms.
2. At the top of this window, click the Copy From button.
3. Use the Copy From and Look in Process drop downs to select the process in which you want to copy a form from.
4. Select the form from the list of Available Forms.
5. Click ![copy], and then OK.
   - The newly copied form may show up in red if the form code is not unique.
   - Click on the form, make necessary changes, and then click Save Changes.

### How do I copy Comment Helper text (from the competency library or a previous process) to a competency?

1. Follow steps 1-4 from How do I add Comment Helper text to a competency?
2. Click the Copy Subcategory From button.
3. Select the location in which you wish to copy a subcategory from (either an existing process or the library).
4. Select the process and the form to copy from.
5. Select the section and competency in order to copy Comment Help.
6. Select from the Available Subcategories.
7. Click Copy, and then OK.

   - The copied subcategory will appear in Comment Help window.

   - To view Comment Help details, click on the listed subcategory.
   - The Edit Comment Help window will open, and the subcategory will be listed, as well as the 15 suggested comments.
   - Edits can be made to the suggested comments.

### How do I copy competencies from the Performance Forms library?

1. In the Properties section of an appraisal process, click Forms, and then select a form by clicking on its title.
2. Click Form Sections.
3. Locate the competency section where you would like to add the competency, and then click the Edit Competency List button.
4. From the Competency List window, click the Copy From button.
5. From the Copy From drop down, select Libraries.
6. From the Look in Process drop down, select Halogen Performance Form Library.
7. Choose a section to copy a competency from. The list of competencies will show in the left hand window under Available Competencies.
8. Click Copy, and then OK.
   - Hold ctrl key to select multiple competencies.
## User Center

### How do I import users?

Initial importing will be done by the Implementation Consultant (IC); users may be imported through HRIS Connect, Excel spreadsheet, or manually by entering data into fields.

- Refer to the Importing Users into the User Center within the Online Help.
- You can also refer to the Instructions tab within the User Center - User Import excel spreadsheet.

### How do I reset/generate a password?

1. From the User Center → User List, search for the employee that needs a new password.
2. Click on the employee's name.
3. In the Password field, input a new password.
4. Click Save.
   - The next time the employee logs in, he/she will use the new password.
   - Hover over the to display the password guidelines, which are configured in the Security Settings under the Options tab.

### How do I assign a new manager?

1. In the User Center → User List, find the individual whose manager you wish to change.
2. Click on that person's name, and then select the Assignment tab.
3. Click the Manager button and search for the new manager to be assigned; select that manager, then click the Apply Selection button.
4. Click Save or Save & Return to User List as appropriate.

### How do I unlock a User after he/she has exceeded the number of consecutive failed login attempts?

1. From the User Center → User List, search for the employee that needs to be unlocked.
2. Click on that employee's name.
3. From the Personal Info tab, input a new password and deselect User Account Locked.
4. The employee will now be able to login with the new password.

### How do I create/re-create groups?

Users can be added to groups during a user import; either by importing the users into a new group, a new group based on import fields, or an existing group.

- Options in the pop-up window include; assigning to an Available Group, create a New Group Name, or New group(s) based on user fields.
- Click OK.

Removing users from a group does not remove the users from the module. It removes them from the group and the users’ association with that group. The same is true for removing groups.

### How do I remove a user from the system once they have been terminated?

- When an employee goes on leave, or is no longer with your organization, they should be deactivated from the User Center. You cannot delete a user who has information in their profile.
- To deactivate a user within the User List, check the box next to his/her name and click the Activate/Deactivate User(s) button. A warning pop-up opens, prompting you to confirm the decision.
- Click OK.
- The User List page refreshes and displays the Inactive icon beside the user name.
- Depending on system configuration, you may also have to remove the employee's manager. To do this:
  1. Click on the user's name to bring up their User Properties.
  2. From the Assignment tab, click the Manager button.
  3. From the Specify Manager window, click Clear Manager. This will remove that employee from that Manager's direct reports list.
  4. Click Save in the User Properties window. If the person you deactivated is a Manager/Evaluator in any live processes or an HR Representative in any live processes with an HR Step, you MUST be sure to find any individuals they are responsible for and reassign those “orphaned” individuals to Manager/Evaluators or HR Representatives respectively who are still active in the process.
Changes have been made to relationships in User Center– how do I update relationships in Participant Center?

1. Under the TalentSpace tab, view the Process Details for the process in which relationships need to be updated.
2. Click on Participant Center.
3. When viewing All Participants, click on the Update Relationships button.

Use this button with caution! If any special relationships have been defined (participant has been assigned a different manager) in the Participant Center the relationships in the User Center will override.

How do I import relationships?

1. From the User Center, click Import Users, then click import relationships.
2. Select the field delimiter.
3. Enter the column number in which that data is found in the text file. For example: In this case, the username of the employee is in column #1 and that employee’s manager’s username is in column #11.
4. Click Browse, locate the .txt file to import, and click Open.
5. Click Begin Import.
6. The software will then define the relationships and build the managerial hierarchy.

What is the difference between the User Center and the Participant Center?

The User Center contains all of the employees or “Users” using the system. The Participant Center contains only those users who will take part in a particular process. You can only have one User Center, but you can have multiple Participant Centers.

For example, if there are 5 different processes each process would have its own unique Participant Center. An interim process may only have participants that are probationary employees, whereas a process that runs at the end of the fiscal year may only have participants that are in the sales department, etc. Different relationships can be established solely for the purposes of a specific process. User center data will not be affected.

How do I add participants to a process?

1. In the Participant Center, click the Add Participants button.
2. In the Add Participants window, utilize the filtering fields at the top if necessary.
3. You may add groups or individuals by selecting the appropriate check boxes.
4. On the lower left, the Options control the role in which you wish to bring these people. Not selecting any Options will bring in these people as Subjects (To be evaluated). Selecting HR Representative or Manager/Evaluator will require you to set up that relationship with a Subject after you have brought these people in.

How do I remove participants from a process?

1. In the Participant Center, find the person or people to remove, select their boxes, and then click on the Remove Selected Items button.

*Notes: Removing a participant from a process will result in loss of data for that individual with respect to that specific process. If you wish to keep the data, do not remove that participant!

When removing a Manager/Evaluator in any process or an HR Representative in a process containing an HR Rep Step, you MUST be sure to find any individuals they are responsible for and assign those individuals to Managers/Evaluators or HR Representatives who are still in the process. If not, the workflow for those “orphaned” individuals will freeze.

1. In the Participant Center, find the person or people to remove, select their boxes, and then click on the Remove Selected Items button.

How do I know who is using which form?

1. From the Participant Center, view All Participants. This window has three sections: Participant, Assigned, and Appraisal. The Form column in the Assigned section indicates which participants are using which form.

How do I check the status of a participant?

1. From the Participant Center, view All Participants. Under the Appraisal column, click Status.
2. The Individual Appraisal Status is listed by Appraisal Steps.
Participant Center

**How do I assign a new form or change the existing form assignment?**

*Note: You cannot change the form assignment for someone who has already opened the form and reviewed it or added information to it. If there is information in the form, a PDF version of it must be saved for reference, then the user needs to be removed from the participant center and added back in before they have a new form assigned.

1. From the **Participant Center**, view **All Participants**.
2. Either select the participant(s), and click the **Assign Form** button.
   
   Or
   
   From the **Form column**, click **Default** (when assigning a new form) or the form code (when changing the existing form assignment).
3. The **Assign Appraisal Form to Participant(s)** pop-up will open, where a Specific Form can be assigned or a form can be assigned Based on a User Field.
4. Enter the search criteria in the **Search forms code or titles** field, and click **Search**.
5. Matching entries will display in the Form Code-Form Title list.
6. Select the form from the list, click **Assign Form**, and then **OK**.
   
   If a form is assigned Based on a User Field, the form code must have the identical name as the User Field. For example: Form Code = job title. Where job title = “Admin Assistant” form code must also = “Admin Assistant”.

Support and Help

**Customer Support**

Email: support@halogensoftware.com
North America: 1 866 270 8412
Australia: 1 800 095 990
International: CC + 1 613 591 5500

[Log in to Customer Success Portal](#)

**Online help**

[Halogen Performance](#)
Halogen Performance™ Pre-launch Checklist

Job Aid

When launching your appraisal process, it is important to validate the configuration of your Halogen Talent Management site. This pre-launch checklist will help you to ensure that all aspects of the setup are completed correctly. While in implementation, your Halogen Implementation Consultant is available to help answer any questions you may have about the items below, if you are not in implementation and require assistance, please contact support.

TalentSpace Tab > Process Details > Properties > General

☐ Process Status has been changed to Open when ready to launch (Go Live)
  *The process must be opened before the start date to enable notifications to be sent at 2:00 a.m. in the time zone specified by the globalization settings.

☐ Process Dates have been defined with a start and an end timeline

☐ Process Options have been discussed and enabled where appropriate

Steps:

☐ Manager writes step has been included (if applicable)

☐ Third-party feedback is enabled on manager writes step (if applicable)

☐ Pre-populate form with direct report’s self-appraisal data on manager writes step (typically used when goal setting)

☐ Prerequisites are correct on each step (if applicable)

☐ Due dates are set for each step – *Note: while due dates are optional, if each step doesn’t have a due date of its own, the system will not send out approaching due or past due notifications. (if applicable)

☐ Approval steps have been included (if applicable)

☐ Add final comments step is added, or add final comments on sign-off is checked (if applicable)

☐ Sign-off steps have been added if using electronic signature - *Reminder: the first person to sign off is the only one who can add comments during the sign off step while using electronic signatures so therefore if you have employee sign off first, you can enable the option for the employee to add comments on sign off, but you can’t enable the option for the manager as well. If you have enabled the comments at sign off for both employee and manager, when you add your form, it will disable your electronic signatures within your form.

360 Multirater™ Options (if a purchased module):

☐ Step is configured correctly

☐ Notifications are setup

☐ Relationships are defined

☐ Competencies, questions and goals are displaying on questionnaire (Form)

☐ Displaying / pre-filling on manager form is configured as desired

☐ Report access is correct

☐ Evaluators are uploaded (if applicable)
Forms:
- Definition section in Form Properties includes form code and title
- Base Form has been enabled for JDB competencies, if JDB module has been purchased
- Form Properties: Options section is enabled for feedback and comment helper, if required
- Form Properties: Options section includes applicable scoring and weighting
- Electronic signature is enabled within Form Properties: Options section
- Form Properties: Appearance for regular text and section headers have been defined
- Rating Scales have been appropriately defined within Form Properties and Form Sections
- Weighting and section rights within Form Sections have been enabled as appropriate
- Employee ID fields within Form Sections are correctly feeding from User Center
- Past Goals and Past Development Plans within Form Sections have been enabled to retrieve the previous year’s goal and development plan information, if required on the form
- Self-appraisal comments/ratings, where applicable, are enabled to show on manager’s form
- Feedback can be applied to the form upon walkthrough test, if feature enabled

Development Plans and Goals:
- Development Plans (if applicable) are added to the process
- Organizational Goals (if applicable) are added to the process
  - Sub Goals are linked to Organizational Goals (if applicable)

Participant Center:
- Inactive users, admin users, and test users have been removed from the Participant Center
- Appropriate participants have been added to the process
  - *It is important to add participants once the User Center has been updated
- All participants have the properly assigned Manager and HR Representative (If HR Reps have been assigned tasks in the process)
- Ensure no one is “Without Manager” that should have a manager assigned to them
- Ensure that top level manager is not assigned the role of subject. Change role to Manager/Evaluator only if required
- All participants are assigned the appropriate form
- All participants have a second-level manager within their hierarchy, if required
- The status link has been reviewed to ensure steps and responsible individuals have been assigned correctly
- Number of participants is correct
- For an Anniversary processes, the participant list has been reviewed to check for people who fall between process start date and first appraisal due date
Notification Center:
☐ Notification text has been customized (within both Notifications Settings in Options tab and the Process Notification Center) *Reminder: Don’t copy and paste text from Word into the notifications
☐ Frequency of notifications has been configured
☐ Contact name is correct (in the Notification Settings within the Options tab)

User Center Tab:
☐ User center has been updated with the latest data, including updates to user properties (personal and job info, assignment/relationships and any custom or salary details)
☐ Activation Notifications have been sent
  * Users should be selected one page at a time (if global activation is decided upon, alternatively each user can activate their own account on the login page)
☐ Group List has been appropriately populated, if leveraged
☐ Custom Labels have been populated where applicable for import purposes
☐ Role Assignment configured appropriately
☐ Talent Profile access granted as appropriate

Options Tab:
☐ Within the User Interface section:
  o Home Page Options have been enabled where appropriate
  o eMail Contact for Help is entered and correct
  o Date Format is appropriately defined
☐ Within the End User Interface section:
  o Under External Links, useful links have been added if required
  o Under Banner/Certificate Images, logo is correct & up to date
☐ Within the Security Settings section, if you do NOT have Single Sign On (Users must enter a username and password to login):
  o Login Settings and Password Strength settings have been configured
  o Use Account Activation Notification is enabled
  o Display account activation link on sign in screen is enabled
  o Security Questions finalized, if required
☐ Within the Security Settings section all:
  o Plug-in Settings enabled, if required
  o Participant Center disabled/enabled as required
  o Employee Records Display Options configured where appropriate for visibility
  o Employee Records – Administration Center disabled/enabled as required

Language Packs (if purchased):
☐ Languages / translations (if applicable) for all areas have been checked:
  o Process name
  o Step and task names
  o Notifications
  o Multirater (steps and notifications)
  o Organizational Goals, if any
  o Development Plans, if any
Types of Reports

Job Aid

In order to **make strategic decisions about developing and coaching your employees**, it’s useful to track employee performance. You can generate this information by running & reviewing Performance reports.

Managers and HR administrators can run a number of reports that **help them better manage their performance management process**, as well as their employees' performance and development.

All the data is presented in real-time. You can filter and sort your view of every report to get exactly the data you need, and print or export the results for further analysis, all with the click of a mouse.

**Tip:** For more details and step-by-step instructions on how to effectively use the various Performance reports, check out the following resources on the **Customer Success Portal**:
- Administration Guide
- Reporting for Administrators Tutorial

| Score | The **Score** report details your employee’s overall scores. It can also display their scores on individual competencies.
|       | Use this report if you want a quick summary of your employee’s scores in an individual competency, or an entire process. You can also use this report to view the scores of all the reports in your chain of command, not just your direct reports.
|       | This report provides similar functionality to the other Score Report. Choose this report when you want to see data visually. Choose the other Score Report when you want to see your data represented numerically, and when you want to write or edit employee appraisals from the report.  

| Score Report | This **Score Report** provides similar functionality to the other Score Report. However, this report presents data in a visual manner, through charts and graphs. This report also provides advanced filtering, and reports across multiple processes.
|             | Choose this report when you want to see your data visually. Choose the other report when you want to see data numerically, and when you want to write or edit employee appraisals from the report.
| Status Report | The **Status Report** displays details about a current Appraisal Process. Managers and Administrators can track the progress of an Appraisal Process and see which of their direct reports have completed each step. Managers and Administrators can view overall status, or view individual status by step or task. From within this report, Managers and Administrators can email their direct reports to remind them about the tasks that need to be completed. |
| Goals | The **Goals** report provides a list of your employees’ goals by showing either their personal goals or organizational goals. Goal details such as the title, details, status, flag, and percent complete are included in the report. Use this report to get a quick look at all of your employees’ goals and answer the following types of questions:  
- Which of my employees have goals with a status of “Not started”?  
- Do my employees have any unapproved goals? |
| Development Plan | A **Development Plan** report provides a list of all of your employee’s development plans. Details of the development plan, such as the title, details, status and so on, are included in the report. Use this report if you want a quick summary of your employees’ development plans. For example, you can generate a development plan report to see the status of all of your employees’ development plans and take action for the ones that are incomplete or late. You can view all of the development plans for all of your employees, or you can view process-defined development plans, which are development plans created on a form during a specific process. You can also view development plans for a specific category or competency being developed. |
| Competency Rating | The **Competency Rating** report identifies the number of employees that were assigned a rating in each competency point scale. For example, five employees received a rating of “3” in the “Customer Focus” competency, and two employees received a rating of “4” in the “Productivity” competency. Unlike the Score Report, the employee’s name is not shown in this report. Use this report if you want to view competency ratings expressed in a percentage format, rather than in a numerical scoring format. Since employee names do not appear on this report, it is a good report to use if you want to view strengths and areas of improvement within a group of employees. |
| **1:1 Status Report**  
| (must be licensed) | The **1:1 Status Report** provides you with the acceptance and progress of 1:1 meetings within the company. This report delivers information on the number and percentage of employees who have met with managers for 1:1 meetings. Employees can be listed by name, or viewed on a graph. You can sort this information using various groupings, such as department, division, or manager. In addition, you can sort employees using filters such as job title and status. |
| **Feedback Report**  
| | The **Feedback Report** lets managers and Super Users understand how feedback is being used in an organization. The report identifies the types of feedback being sent and received, as well as who is sending feedback, and for whom. Managers and Super Users can use the Feedback Central report to identify feedback sent and feedback received to see how feedback impacts employee performance and engagement. |
| **Multirater Status**  
| (Multirater must be licensed) | The **Multirater Status** report provides you with a high-level view of evaluators who are providing feedback for an employee.  

Use the legacy version of the Multirater Status report to see the number of employees that have completed the evaluation, the number that have not yet completed the evaluation, and the number that have declined the evaluation. You can drill-down or view more detailed information about the subjects of the Multirater process, such as viewing the names of the evaluators. You can also use this report to notify evaluators involved in the process that they have a task to perform.  

Use the new version of the Multirater Status report to see the status of the Multirater assessments in chart form. You can also filter on items such as process title, process type, start and end dates, and who launched the multirater assessments such as administrator or manager. You can report on multiple processes at a time and view more information in the list view by adding different columns of information. You can view the list grouped by evaluation status, by subject name, by evaluator name, and more.  

You can use the Multirater Status report to answer the following types of questions related to a multirater assessment:  
- How many evaluators have declined to provide multirater feedback across all employees in the process?  
- How many evaluators for employees in my team have provided multirater feedback?  
- What is the status (completed, declined, not started, under approval, in progress) of the multirater evaluation of a specific evaluator?  
- How many times has an evaluator been selected in an evaluation process in the last year?  
- How many evaluators has an employee or manager selected to provide feedback? |
Making the Most of Your Status Report

Job Aid

The **Status Report** provides the information needed to effectively manage an assessment or evaluation process. You are quickly able to drill into the data to discover where delays are occurring and send notifications immediately to encourage completion. You can also easily identify bottlenecks in the process.

Managers get all the same functionality offered to HR administrators but can only view data for employees who report to them directly or indirectly.
The **Status Report** provides cross process capabilities as well as powerful filtering, sorting and grouping capabilities taking full advantage of the power of the new reporting framework.

The **Status Report** offers **five different views**. Each view is designed to get you the information you need with one click.

<table>
<thead>
<tr>
<th>View</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Overall Status</strong>:</td>
<td>The overall status immediately gives administrators the ability to see where employees are in the process based on their current status.</td>
</tr>
<tr>
<td><strong>Status by Step</strong>:</td>
<td>Gives an overview of the number of employees in each step by status.</td>
</tr>
<tr>
<td><strong>Tasks Approaching Due</strong>:</td>
<td>Shows the number of tasks currently in the approaching due status and lists the person responsible for that task.</td>
</tr>
<tr>
<td><strong>Tasks Overdue</strong>:</td>
<td>This report focuses only on tasks that are currently overdue listing the person currently responsible for that task.</td>
</tr>
<tr>
<td><strong>Process Flow Analysis</strong>:</td>
<td>This report helps managers and HR administrators identify steps that employees are having difficulty completing on time. For each step in your process, this view shows the total number completed on time vs. late.</td>
</tr>
</tbody>
</table>
Setting up your status report(s) is easy with the report portal.

1. **Determine the view**

2. **Select your filters**

3. **Group your data**

4. **Customize your view**

5. **Save and share your preferences**

6. **Run report over and over**
Using Reports to Manage Your Appraisal Process

Job Aid

We’ll show you how to:

- Get instant access to valuable performance metrics to:
  - Identify trends in employee strengths and weaknesses
  - Promote consistency in appraisal processes
  - Track progress toward organizational goals

How can reports be used to manage the appraisal process?

<table>
<thead>
<tr>
<th>Before you create a process</th>
<th>Use reports from your most recent process to examine what components were effective and opportunities for improvement</th>
</tr>
</thead>
<tbody>
<tr>
<td>During your active process</td>
<td>Use reports to manage your current process and take actions that will help ensure a smooth and successful process</td>
</tr>
<tr>
<td>After your process concludes</td>
<td>Gather performance data to show how your organization performed on goals and competencies</td>
</tr>
</tbody>
</table>

**Before:** Status Report of Your Previous Appraisal Process

The **status report** of your previous appraisal process will give you an overall completion percentage for the entire process. If the overall **percentage complete** was lower than you would like, you should look at how you can change your upcoming process to get a higher completion rate.

**Tip:** Please see the Using the Information from Previous Appraisal Processes section for suggestions on how to achieve a higher completion rate.
To view the Status Report of a Previous Appraisal Process:

1. Once you have logged in to the back end of the application, select the **Status Report…** link of your most recent appraisal process.

   ![Status Report Table]

2. You will see the Status Report for the process. Look at the overall completion rate for the process.

![Status Report Table]

**BEFORE:** On Time Report of Your Previous Appraisal Process

The **On Time Report** will show you which steps were bottlenecks during your previous appraisal. It can help you to identify steps which may require more time to complete, and users who may require more training.

To view the On Time Report of a Previous Appraisal Process:

1. Once you have logged in to administrative side of the application, select the **Process Details…** link of your last appraisal process.

![Process Details Table]
2. Select the Report Center link in the left navigation menu. Then select the link to view On Time Reports.

3. The On Time Report will display. Look to see if any of the steps had a high percentage that were not completed on time to determine if you should make any adjustments for your upcoming process.
**BEFORE:** Using the Information from Previous Appraisal Processes

If you have examined the **Status Report** and **On Time Report** for your last appraisal process and identified areas for improvement, here are some suggestions to help improve your next process:

- **Reduce or combine steps within your process.**
  This can help with the overall completion percentage. If you can exclude a step that had a high percentage not completed on time, you can reduce bottlenecks.

- **Allow more time for completion.**
  Look at the steps identified in the On Time Report with a high percentage of not completed on time. Allowing more time for participants in these steps may help with completion rate.

- **Implement additional employee training for the system.**
  If you have identified a group of employees who have had difficulty completing steps, they may need additional training on using the application.

**DURING:** Status Report

Once you have created a new appraisal process and optimized it based on the information from your previous year’s report, you can use the **Status Report** to manage the appraisal process and take actions that will help ensure a smooth and successful process.

**To view the Status Report of an Open Process and Send Additional Notifications:**

1. Once you have logged in to the back end of the application, select the **Status Report…** link of your active appraisal process.

   ![Status Report](image)

2. You will see the Status Report for the process. Monitor the column **Appraisals Currently in This Step** to see which steps are incomplete.

   ![Steps Listed in Red](image)

3. From this report, you can use the **envelope icon** (✉️) to customize and send additional notifications to employees who have an overdue task. This option will send the message to all employees who currently have that task to complete.
AFTER: Group Score Report

After an appraisal process has been completed, it is a good idea to look at the process reports. These can provide useful performance data to show how the organization has performed. Use the reports in the HR Control Center to capture this information.

To view the Group Scores Report of a Completed Appraisal Process:

1. Once you have logged in to the back end of the application, select the **Process Details**… link of your completed appraisal process.

2. Select the **Report Center** link in the left navigation menu. Then select **Group Scores** report.

3. You will see links for all of the **groups** that were evaluated in the process. Select the associated link to view the scoring results for any group listed.
**AFTER: The Competency Rating Report**

The **Competency Rating Report** helps you to determine your organization's strongest and weakest competencies. You can then use this information to direct your training and development efforts. Filtering the report by department, job title, and other fields can help you to focus on the competency achievement of specific groups.

To view the Competency Rating Report:

1. Within the Process Details… of your completed process, select the **Report Center** link in the left navigation menu. Then select **Competency Rating**.

2. Select the competencies you want to look at and click the **Add** button. If you wish, apply any **User Field** filters.

3. Select **Update Report** to generate the report.
**AFTER: Development Plan Report**

The **Development Plan Report** helps you to ensure that employees have been assigned appropriate development plans for areas identified as needing improvement.

**To view the Development Plan Report:**

1. Within the **Report Center** of your completed process, select the **Development Plan** link.

2. Select whether you would like to sort Development Plans by **Title** or **Individual**. If desired, set the **Report Filters** and/or **Category Filters**.

3. Click **View Report** to generate the report.
The **Goals Report** provides HR administrators and executives with the metrics to determine if corporate objectives are well supported by individual goals. The **status** and **flag** information helps you to see **overall goal progress** at a glance.

**To view the Goals Report:**

1. Within the **Report Center** of your completed process, select the **Goals** link.

2. If **Corporate Goals** were used in this process, selecting the checkbox next to a corporate goal will generate a report that includes all employee goals that have been linked to that goal.

3. In the **Display Options** area, select a checkbox to include the associated field in the generated report.

4. Use the **Filter Options** to filter your report results as desired.

5. Select the **View Report** button to generate the report. (If report results are already available).