LEAD@UVA

Tips & Common Actions

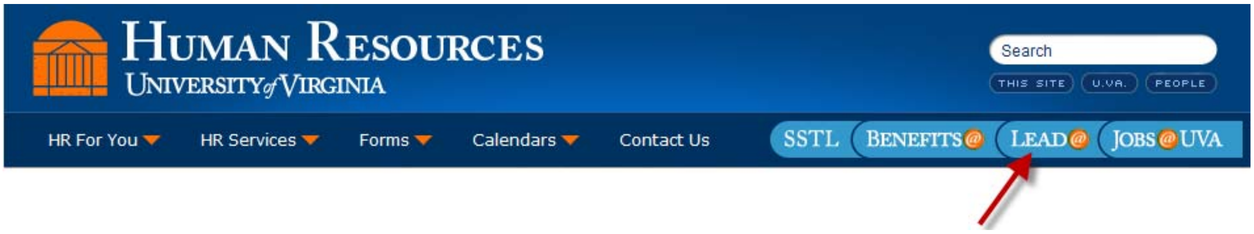
Contents

Introduction

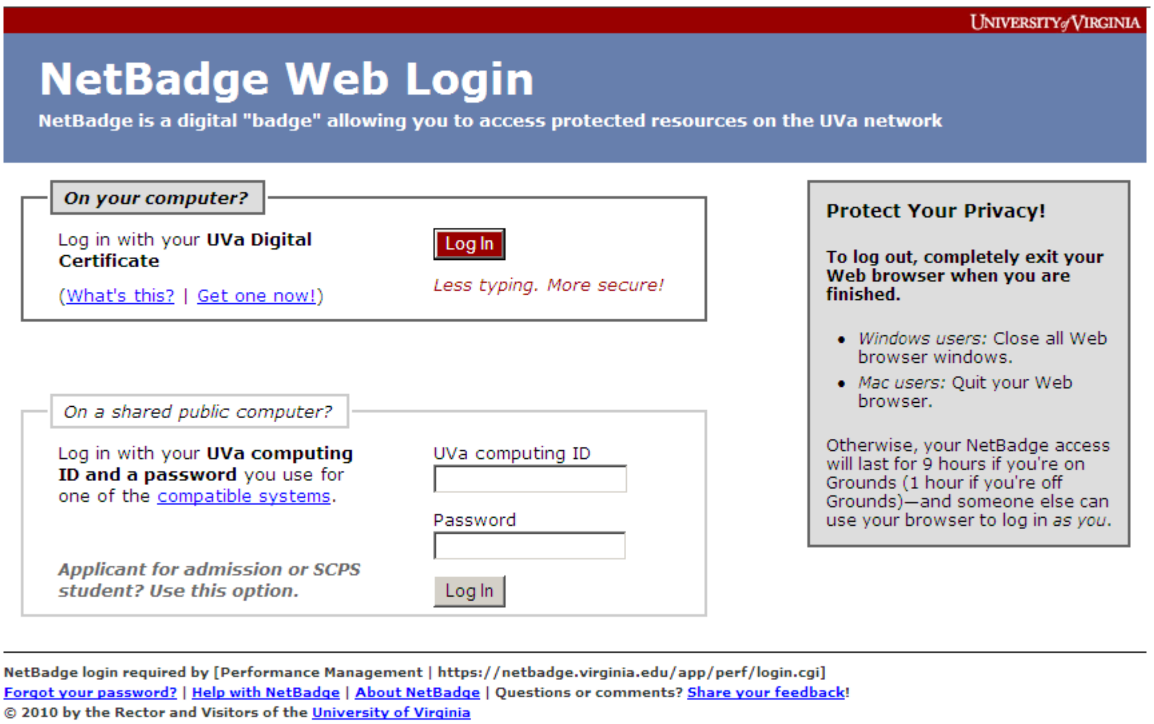
This document addresses our users' most frequently asked questions. Do you have suggestions or comments regarding the contents of this document? Please email us at lead@virginia.edu.

University Human Resources maintains a website full of helpful information on both the process and system at http://www.hr.virginia.edu/other-hr-services/employee-development/performance-management/. If you don't find what you're looking for on the website, you may wish to phone your local HR representative who can direct you to a Lead@UVa super user in your area. Additionally, you may call the Service Center at 982-0123 or email lead@virginia.edu.

1. Using NetBadge to log in



Access Lead@UVa from the HR website: www.hr.virginia.edu. When you click the Lead@ logo or your bookmark, the following NetBadge Web Login page displays:



Log in using one of two methods:

- Log in with one click using your UVa Digital Certificate.
- Use your UVa computing ID and your either your eServices or Central Mail System (CMS) account password.

If you are having difficulty logging in to Lead@UVa contact 924-HELP, option 1. To learn more about NetBadge, visit the ITC website: http://itc.virginia.edu/netbadge.

2. Supported Browsers and Lead@UVa

Lead@UVa can be accessed through Internet Explorer (IE) and Firefox.

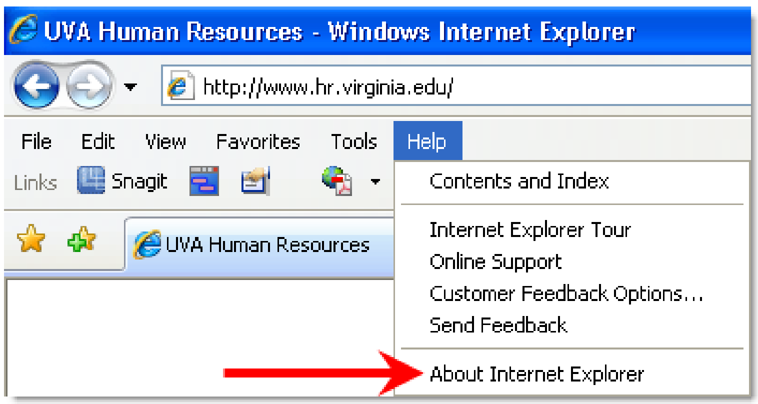
Internet Explorer

Which versions are compatible?

Currently, IE7 is the preferred web browser for Lead@UVa. If you are using IE8 you may need to adjust your compatibility settings.

To check your version:

1. Open Internet Explorer.
2. From the menu bar select **Help > About Internet Explorer**.



3. A dialog box displays the version number you are running.

If you are not using IE7 and want to, contact your LSP.

What if I use IE8? Setting "Compatibility Mode"

Some websites may not display or function as intended when you are using Windows Internet Explorer 8. For example, you may experience any of the following symptoms:

- Menus, images, or text are in the wrong positions on some websites.
- Some website features do not work.
- You receive script error messages on some websites.
- Internet Explorer stops working or crashes on some websites.

Internet Explorer 8 includes a Compatibility View feature that displays websites that were created for older browsers as they were designed to appear. You can enable Compatibility View in Internet Explorer or on the web server.

To enable Compatibility View for a single computer, try **Method 1** for each website that is not displayed correctly or that does not work correctly. If this problem occurs on many websites that you frequently visit, you can enable Compatibility View for all websites by using **Method 2**.

Method 1: Enable Compatibility View for specific websites

To enable Compatibility View for specific websites that are not displayed correctly or that are not working correctly, follow these steps:

1. Open the website that is not displayed correctly or that does not work correctly in Internet Explorer 8.
2. Click the **Compatibility View** button located directly to the right side of the address bar next to the **Refresh** button. Or, select Compatibility View from the Tools menu.

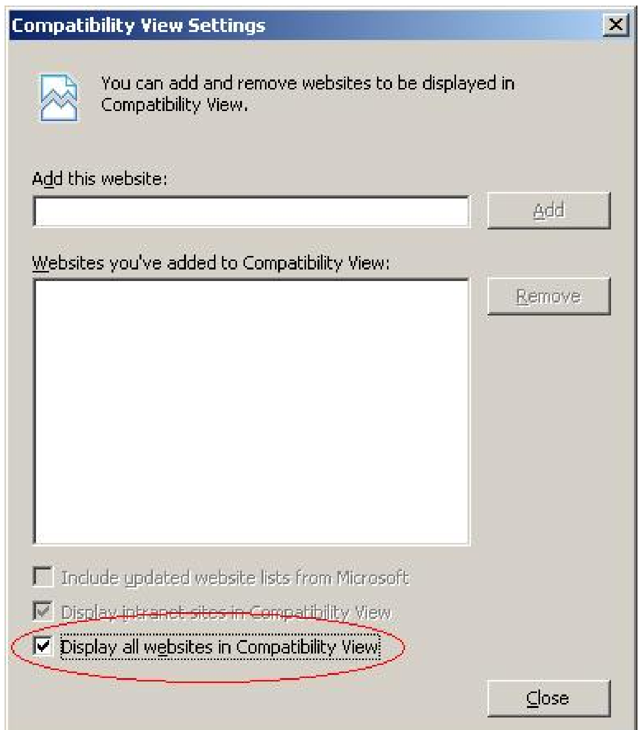
Notes:

- **a.** If the **Compatibility View** button does not appear to the right side of the address bar, or if the command is not available on the **Tools** menu, you cannot use this method. You may be experiencing a different problem, or the network administrator may have used a Group Policy setting to configure the Compatibility View settings on your computer.
- **b.** When you use this method to fix a website, Internet Explorer saves your Compatibility View setting for that website. Every time that you visit that site, Compatibility View will be used. To stop a website from running in Compatibility View, repeat this method by clicking the Compatibility View button again for that website.
- **c.** You can also add or remove specific websites from Compatibility View without actually visiting each website. To do this select Tools > Compatibility View Settings.

Method 2: Enable Compatibility View for all websites

You may want to enable Compatibility View for all websites. To do this:

1. Open your IE8 browser.
2. Select **Tools > Compatibility View Settings**.
    a. If Compatibility View Settings is not available, the network administrator may have used a Group Policy setting to configure the options for you. Contact your LSP or the help desk.
3. Select the **Display all websites in Compatibility View** check box.
4. Click **Close.**



Firefox and Mac Users

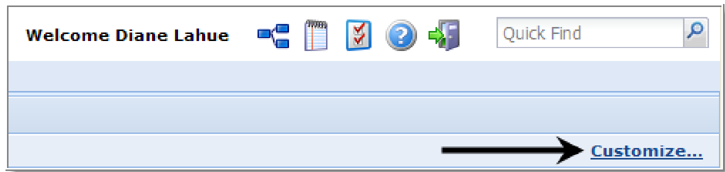
Lead@UVa also supports Firefox 3.0 and above. For those individuals using a Mac, you will be able to run Firefox without running a Virtual Machine (VM ware).

3. Customizing Your Dashboard

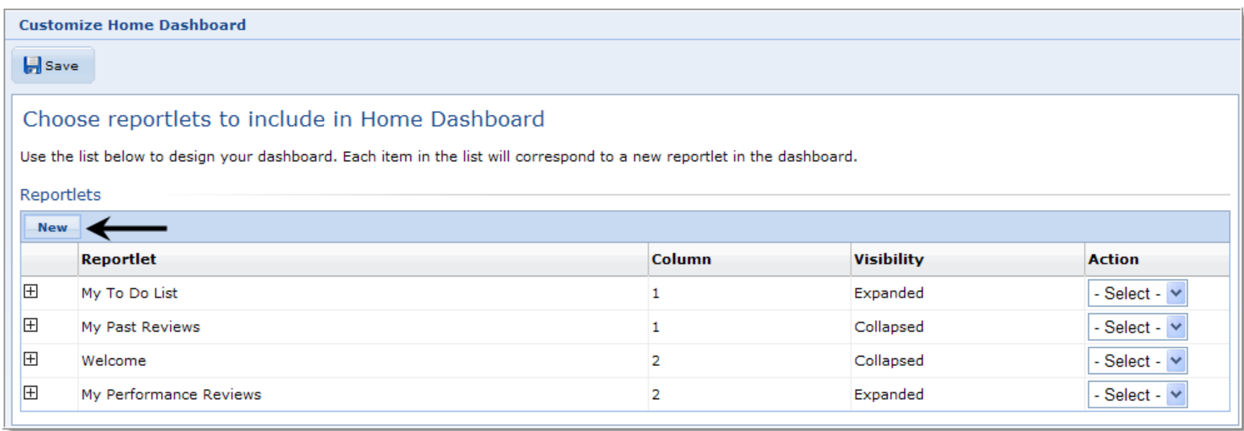
You can customize home dashboards to more easily access information you need to view on a regular basis. The information that displays there is a product of a type of report in Lead@UVa known as a **reportlet**.

All users have the ability to customize the information that is contained on their dashboard. In the case of a supervisor, adding certain reportlets may prove extremely beneficial as they contain information about their team's completion status in an easily accessible way.

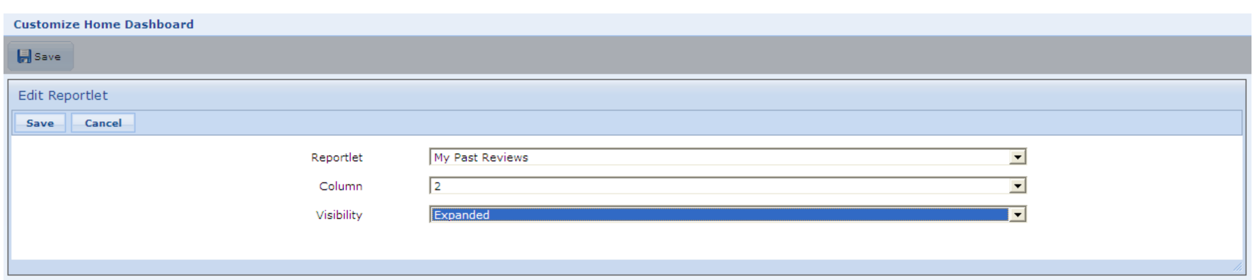
1. Begin by clicking the Customize link in the upper right corner of your Lead@UVa dashboard.



2. The current configuration of your dashboard displays. Click the **New** button and then choose a reportlet to display.



3. The Edit Reportlet page displays. Use the dropdown lists to select the Reportlet, the Column (1 for left or (2) right, and Visibility (expanded or collapsed).



4. Click **Save**.
5. The new reportlet displays on the list of items on your dashboard. Continue adding reportlets or click **Save** to return to your dashboard, where the new reportlet is displayed.

The reportlet now displays on your dashboard.

Some recommended reportlets

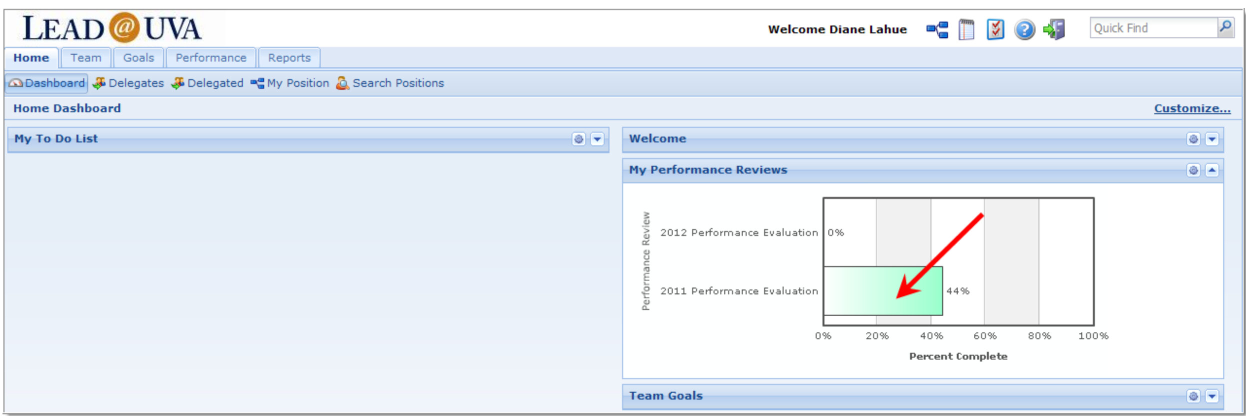
You may find the following especially helpful:

- My Past Reviews (allows you to access past reviews)
- My Performance Tasks (provides a history of your current and previous reviews)
- Team Completion Report (for Supervisors)
- Team Goals (for Supervisors)
- Team Past Reviews (for Supervisors)
- Team Performance Reviews (for Supervisors)
- Team Rating Distribution (for Supervisors)

4. “One-clicks”: Accessing Data from the Dashboard

Once you have customized your dashboard, you can access any of the reportlets via “one-click”.

For example, the default My Performance Reviews reportlet allows you to monitor your progress through the performance workflow and view your form at any time, even when you have no action to take in My To Do List.



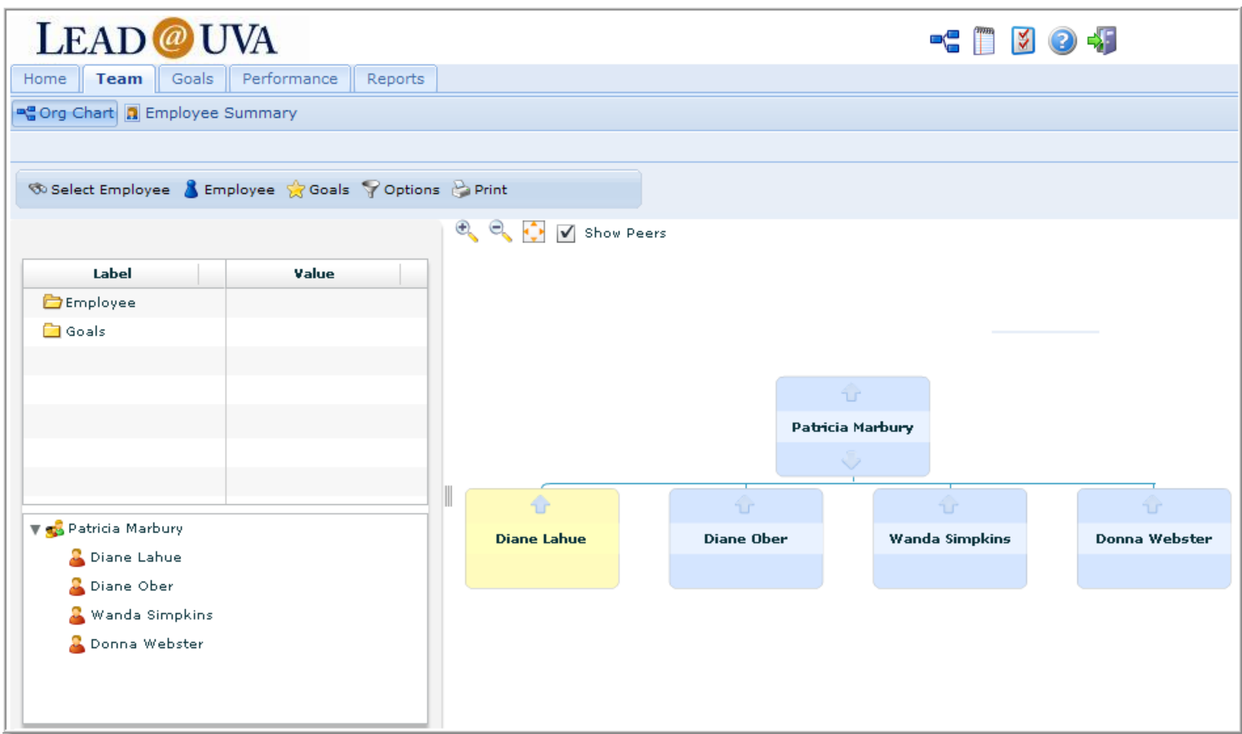
When you click the actual progress bar, the list of the steps your evaluation has been through displays. Click the **View Form** button to view your performance plan.

5. About the Team Tab

The Team tab gives you additional useful views.

Org Chart

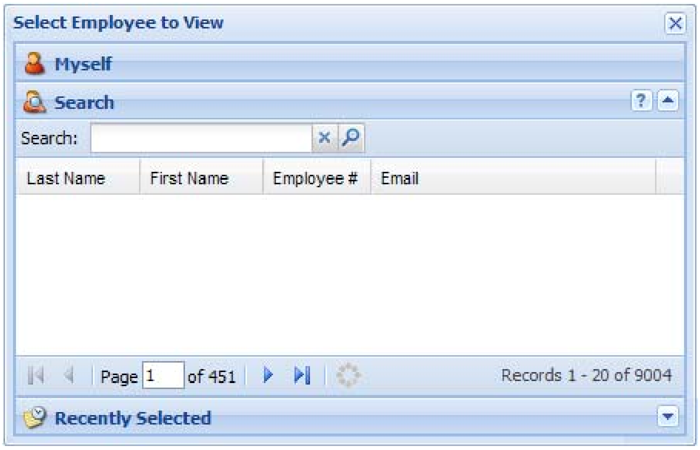
This allows you to view your organization’s structure graphically. Click the arrows to move your view up or down in the structure.



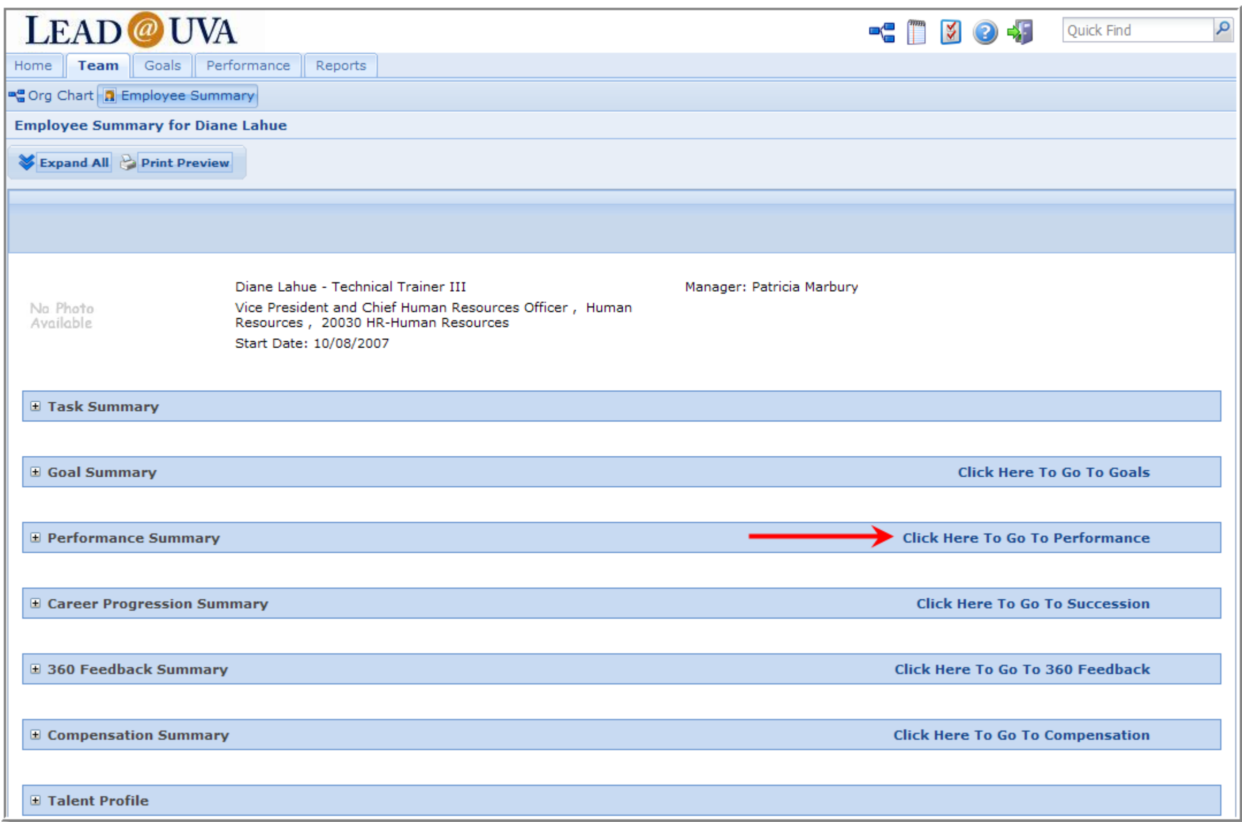
Employee Summary

This allows you to review information about yourself. For managers and supervisors, it provides another access point to review employee information and evaluation forms.

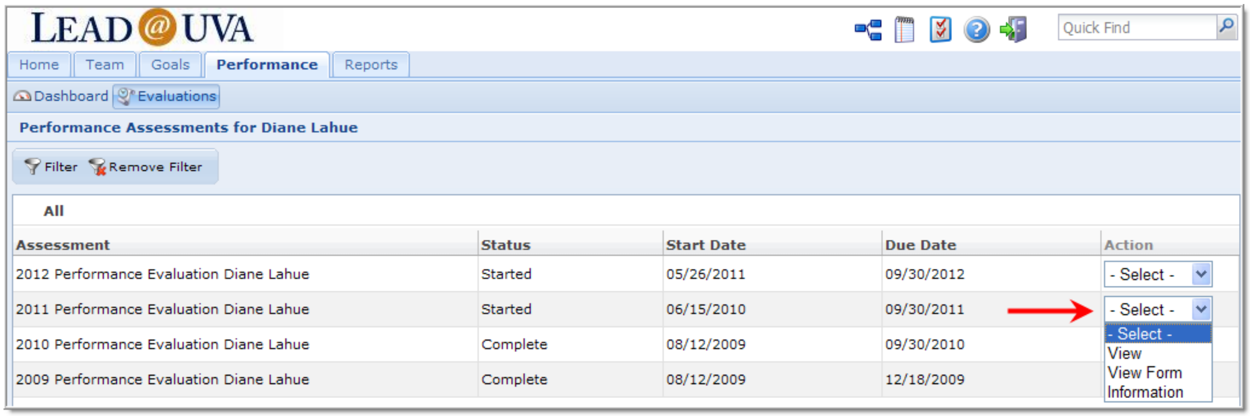
1. Clicking **Employee Summary** displays a search box.
    a. As the employee, you can only select **Myself**.
    b. As a manager or supervisor, you can use the Search field to find and select your employee’s name.



2. The Employee Summary page lists additional views for access. For example, you can click the link to access your **Performance Summary**.



3. Your Performance Assessments page displays. From the Action dropdown list, select **View** to display the history of which steps have been completed. Select **View Form** to display the form itself.

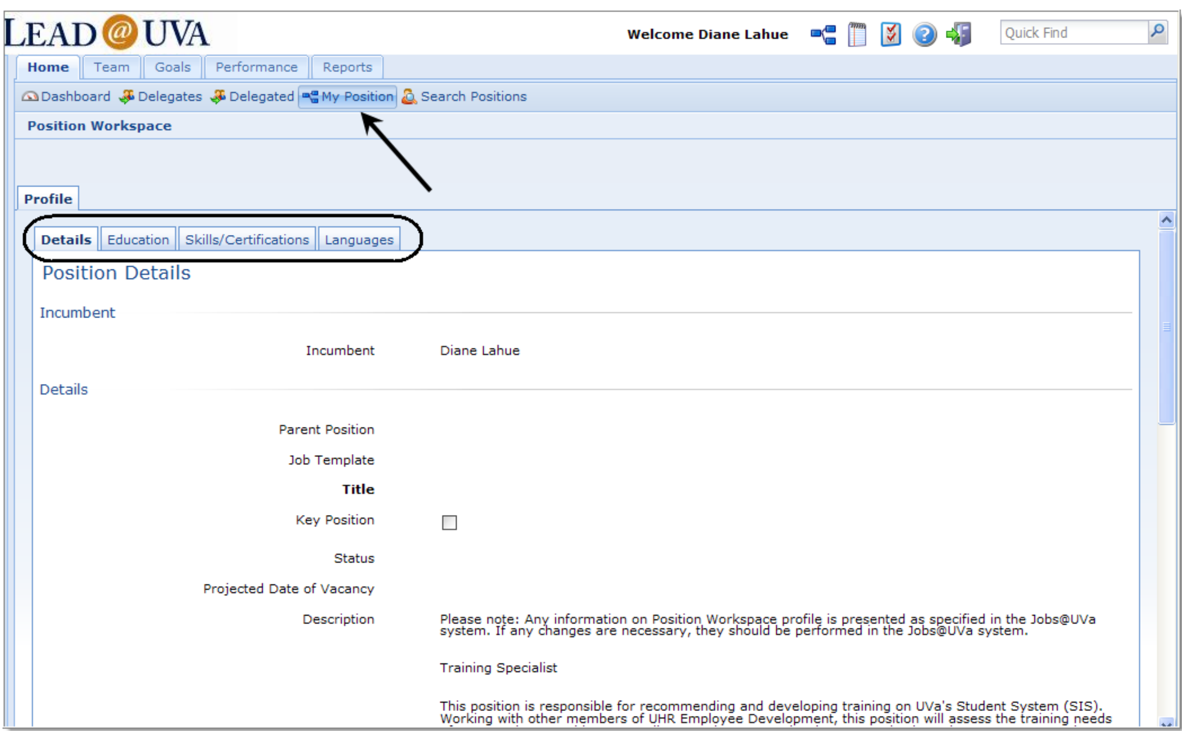


4. Position Information

My Position

Lead@UVa receives data from Jobs@UVa. When you draft your performance plan, if a job description is in Jobs@UVa the description will be available as a reference in Lead@UVa. If there is no active position description in Jobs@UVa, no information displays. (If the tab is populated and the information is not correct, it can be updated through Jobs@UVa.)

To view your information from your home page, select **My Position**. Several tabs of information display for your use.

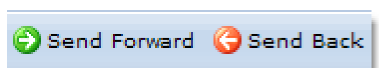


Search Positions

If you are a manager or supervisor, you can search for position descriptions on your employees. Do this by clicking the Search button located to the right of the Incumbent field.

5. Understanding the Send Forward and Send Back actions

It is crucial to remember that the Send Forward and Send Back actions refer to steps in the workflow, as shown below. Send Forward always sends the form to the next step, even if that means it is sending it back to a person. So for example, if the form is currently in Step 5 and is sent back, it will go to the person who "owns" the form in Step 4, the supervisor.



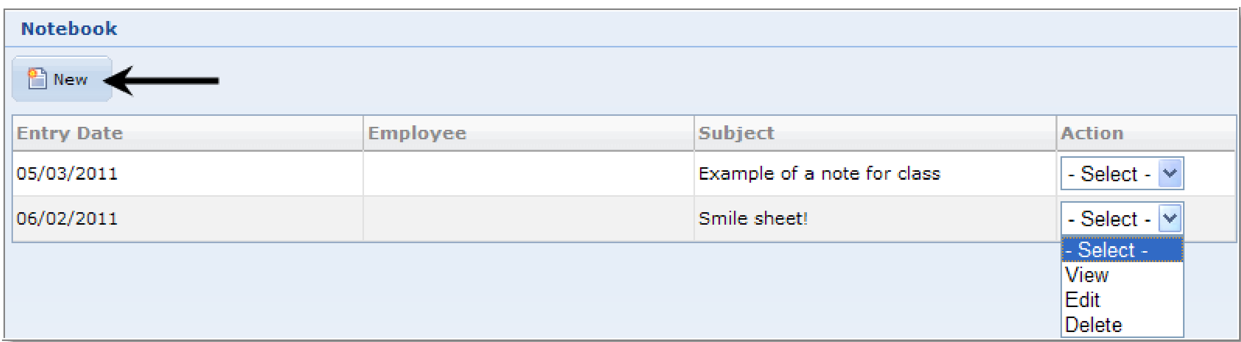
Confusion around these actions can occur. For example, a reviewer in Step 7 selects Send Back because he has signed the evaluation and wants to send the form to the supervisor. Since he received it from the supervisor, he might assume Send Back returns the form and it does, but in the wrong step. The reviewer in this example should actually select Send Forward to move the form to the correct, and next, step in the workflow.

6. Using the Notes Feature

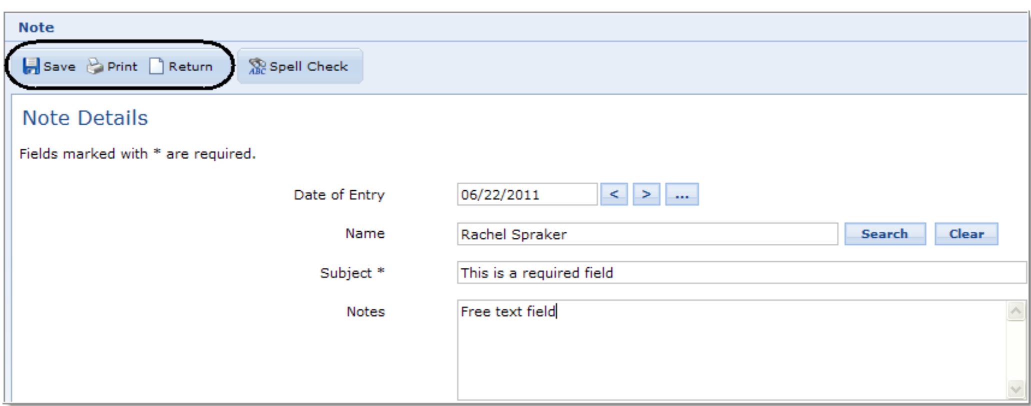
All users can write and keep confidential notes in the Lead@UVa site. **Notes** are external to the actual evaluation forms and are viewable only by you.

1. To begin, click the Notebook icon in the header of your Lead@UVa site.

2. Your Notebook page displays. Use the Action dropdown lists to manage your notes. Click the **New** button to add a note.



3. Add details as in the example below. Managers and supervisors: Note your ability to search for and add your employees' names. You can then sort your notes by employee.

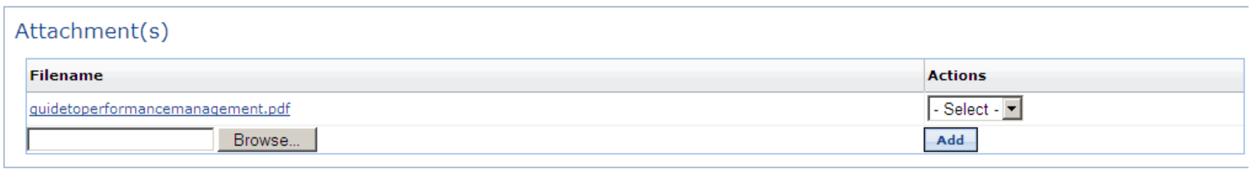


4. Click **Save**.

5. Uploading and Reviewing Attachments

When the evaluation form is accessed from the To Do List, the Overview page displays first. The **Attachments** section is located at the bottom of this page.

1. Add a document by selecting **Browse** and navigating to the file on your computer.
2. Highlight the file and click **Add**. The file is attached to the evaluation.



Attached documents display as links. Clicking a link launches the document in a separate window. You can manage attachments you own using the Actions dropdown list.

Important Note: Employees, supervisors, and reviewers can all add files to this area, which remains available until the signature steps of the workflow (beginning with Step 7). Attachments are visible to anyone who can see the form (employee, supervisor, and reviewer). This differs from the Notes feature which is viewable only by the person who creates the note.

6. Email Notification

Automatic email notification occurs at certain steps in the workflow when the form (evaluation) is sent forward. Emails are sent to your @virginia.edu account and notify you when you have a task in your My To Do List.

Emails are configured for:

Step 2 - supervisor reviews and approves goals

Step 3 – employee completes an interim self-evaluation

Step 5 – employee performs self-evaluation for annual period

Step 6 – supervisor evaluates employee

Step 8 – supervisor signs evaluation form

7. Organizational Goals

Beginning with the 2012 review cycle, the performance management cycle includes the use of organizational goals functionality, located within the Organizational Goals tab on each person's individual form. This feature helps employees see the alignment of their goals to those of their unit's critical functions.

Additionally, managers and supervisors can revise and adapt these organizational goals and send ("cascade") them to either their direct reports or a select group of direct reports.

Organizational goals:

- Connect the overall mission of the institution to school and unit-based initiatives
- Provide structured, positive leadership opportunities for supervisors by allowing them to overtly connect their employees' goals to the goals of their department and the University
- Will exist on their own unique tab on each person's individual form
- Will be informational only and not rated
- Can be cascaded down from various leaders in the organization
- Can be aligned up to broader initiatives for the purposes of reporting
- Can be revised or enhanced to specify goals for individual schools and units
- Can be used by employees to craft their own performance goals

In Practice:

- Strategic planners will communicate overall Organizational Goals to local Lead@UVa org. goal administrators (a subset of Super users)
- Org. Goal administrators enter the goals in Lead@UVa and can then cascade to various levels as instructed (direct/indirect reports, specified individuals, entire group)
- Supervisors review goals, decide how to modify, and pass to team members
- Employee reviews information, crafts S.M.A.R.T. goal in separate performance goal section, where they can then select an alignment to the highest level organizational goal
- Departments/Units decide how they want to use the functionality