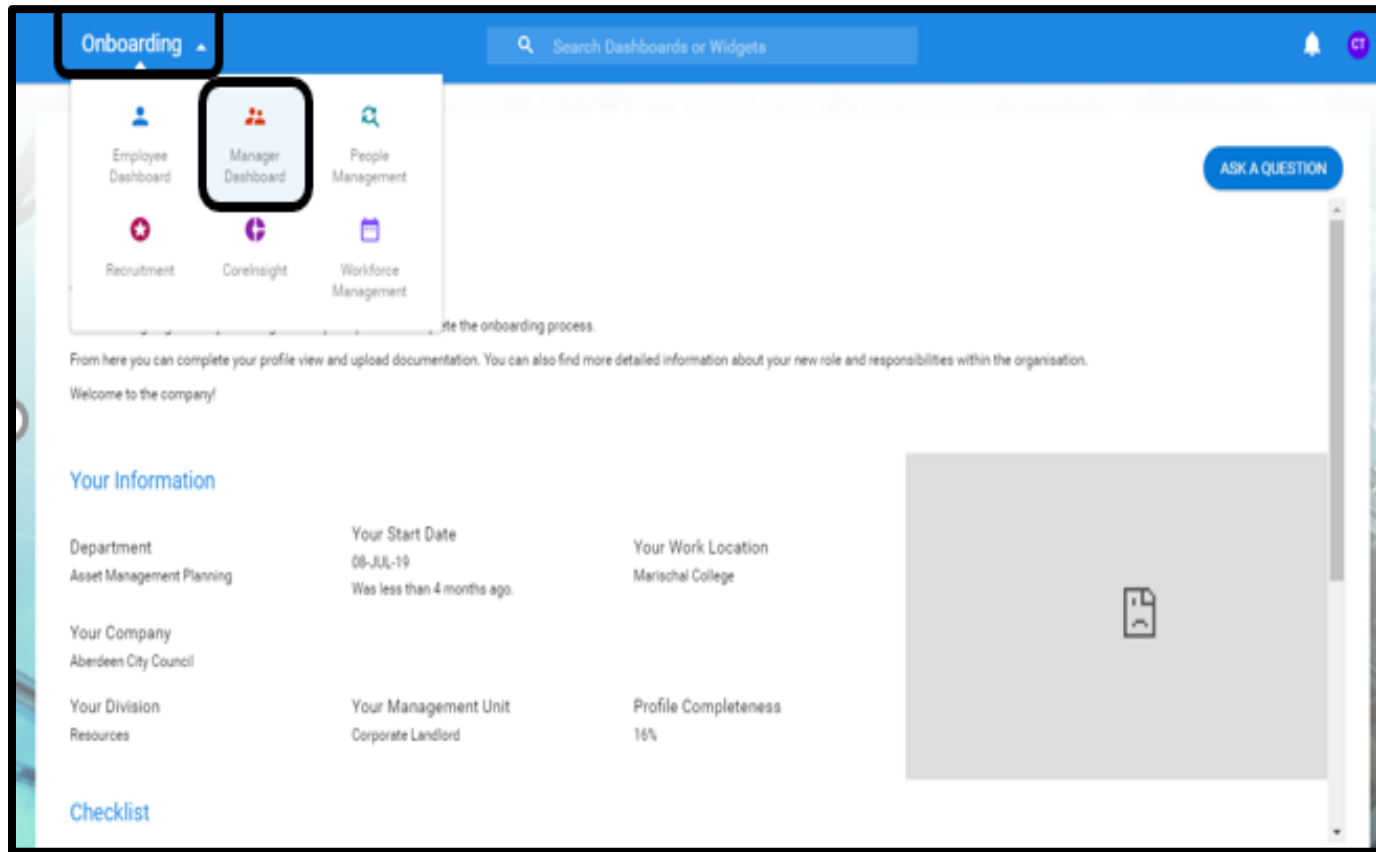


**GETTING
STARTED
WITH
CR&D IN
CORE HR**

GUIDE FOR MANAGER

○ Manager Dashboard



Once you're signed into CoreHR, **click on the drop down arrow at the top left** of the screen next to the word 'Onboarding' or 'Employee Dashboard'. From the menu of modules appear, choose **Manager Dashboard**.



Manager Dashboard

My Team's CR&D

VIEW ALL

Status	Count
Complete	2
In Progress	5
Overdue	3

My Team's Objectives

VIEW ALL ADD NEW OBJECTIVE

Search

Assigned To	Objective	Due Date	Status
Star Trainer 544-7	test objective	01-Mar-2021	Work in progress
Star Trainer 544-7	TEST - Copy	01-Mar-2021	Work in progress
Star Trainer 544-7	TEST	01-Mar-2021	Cancelled

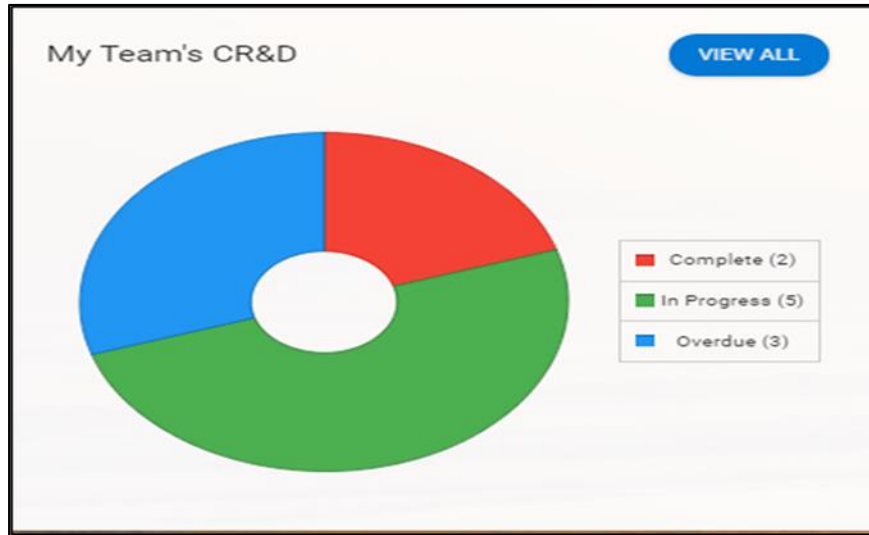
1 - 3 of 5

Select **CR and D** from the panel on the left hand side. If you can't see the CR and D text displayed, click on the ★ icon. Two widgets will appear: My teams CR&D and My Team's objectives





'My Team's CR&D' window allows manager to view **all** elements of past and current CR&Ds for all employees assigned to the team.



'My Team's Objectives' widget provides manager with a snapshot of employees objectives and gives an option to assign new objectives.



My Team's Objectives

VIEW ALL ADD NEW OBJECTIVE

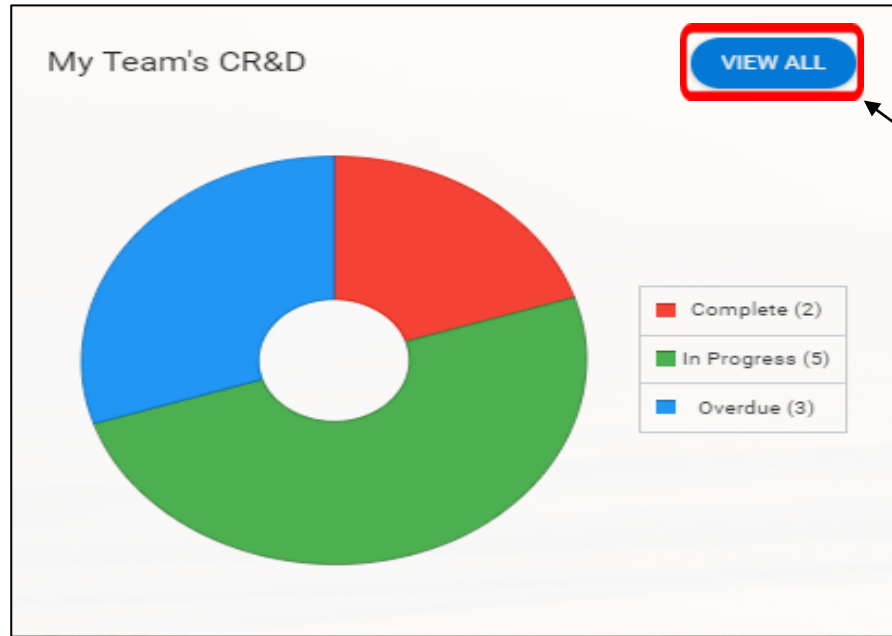
Search

Assigned To	Objective	Due Date	Status
Star Trainer 544-7	test objective	01-Mar-2021	Work in progress
Star Trainer 544-7	TEST - Copy	01-Mar-2021	Work in progress
Star Trainer 544-7	TEST	01-Mar-2021	Cancelled

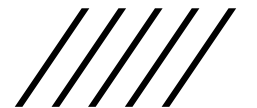
1 - 3 of 5



My Team's CR&D



When the 'My Team's CR&D' window opens click on **VIEW ALL** button so you can see all employees you have been assigned and all parts of their CR&Ds.



You might still see the different parts of CR&D listed from last year for some of your employees, this is because they have not been closed off. By signing these off with your employee, they will disappear from your list.

You can either view current or past CR&Ds by clicking on the drop down to change this from **Current Appraisals** to **All Appraisals**.

My Team Appraisals
Manager Dashboard > My Team Appraisals

Direct Appraisals Indirect Appraisals Calibration

Search by review name

NE	New Employee Department Housing Access And Support	Appointment 823-4 Job title Admin Assistant	ZZZNon PC user version	Stage 1 Overdue	30-Sep-2019 Stage Due Date	⋮
T6	Talent Employee 6 Department Admin Support	Appointment B9050-6 Job title Admin Team Leader	ZZZNon PC user version	Stage 1 Overdue	30-Sep-2019 Stage Due Date	⋮
T8	Talent Employee 8 Department Transactions And Business Support	Appointment 623-12 Job title Admin Officer	ZZZNon PC user version	Stage 1 Overdue	30-Sep-2019 Stage Due Date	⋮
CT	Co Trainer Department Asset Management Planning	Appointment 100-2 Job title Project Assistant	Increment Questionnaire - 2020-21	Increment Awaiting Employee Action	01-Mar-2021 Stage Due Date	⋮
CT	Co Trainer Department Asset Management Planning	Appointment 100-2 Job title Project Assistant	STEP 1 - Objectives and Progress Review 2020...	Complete	Complete Stage Due Date	⋮
ST	Star Trainer Department Revenue And Benefits	Appointment 544-7 Job title Accord Card Manager	STEP 1 - Objectives and Progress Review 2020...	Objectives And Progress Review Stage 1 Awaiting Employee Action	01-Mar-2021 Stage Due Date	⋮
CT	Co Trainer Department Asset Management Planning	Appointment 100-2 Job title Project Assistant	STEP 2 - Capability Framework 2020/21	Capability Framework 2020-21 Awaiting Employee Action	01-Mar-2021 Stage Due Date	⋮



Manager can use a search field to ensure that all of the team is fully set up. In a search box enter employee's or appraisal name. Searching by employee's name will allow you to view all elements of CR&D for this employee whereas searching by name of appraisal will bring up all employees assigned to this cycle.

The screenshot shows the 'Manager Dashboard' interface. At the top, there is a navigation bar with a back arrow and the text 'Manager Dashboard'. Below this is a section titled 'My Team Appraisals' with a breadcrumb trail 'Manager Dashboard > My Team Appraisals'. There are three tabs: 'Direct Appraisals', 'Indirect Appraisals', and 'Calibration'. Below the tabs is a search bar containing the text 'star'. To the right of the search bar is a dropdown menu set to 'All CR&Ds'. Below the search bar is a table with three rows of appraisal data. Each row has a 'Launch' button and a 'Print Review' button, both of which are highlighted with a red box. The table columns include employee name, department, appointment number, job title, appraisal step, description, and stage due date.

Employee	Department	Appointment	Job Title	Appraisal Step	Description	Stage Due Date	Actions
Star Trainer	Department Revenue And Benefits	Appointment 544-7	Job title Accord Card Manager	STEP 1 - Objectives and Progress Review 2020...	Objectives And Progress Review Stage 1	01-Mar-2021	Launch, Print Review
Star Trainer	Department Revenue And Benefits	Appointment 544-7	Job title Accord Card Manager	STEP 2 - Capability Framework 2020/21	Capability Framework 2020-21	01-Mar-2021	Launch, Print Review
Star Trainer	Department Revenue And Benefits	Appointment 544-7	Job title Accord Card Manager	STEP 3 - Development Plan 2020/21	Development Plan	01-Mar-2021	Launch, Print Review

Then you can open each section by clicking on the ellipsis and choosing **Launch**. The **Print Review** option allows you to print out that section.






○ My teams objectives

My Team's Objectives

VIEW ALL ADD NEW OBJECTIVE

Search

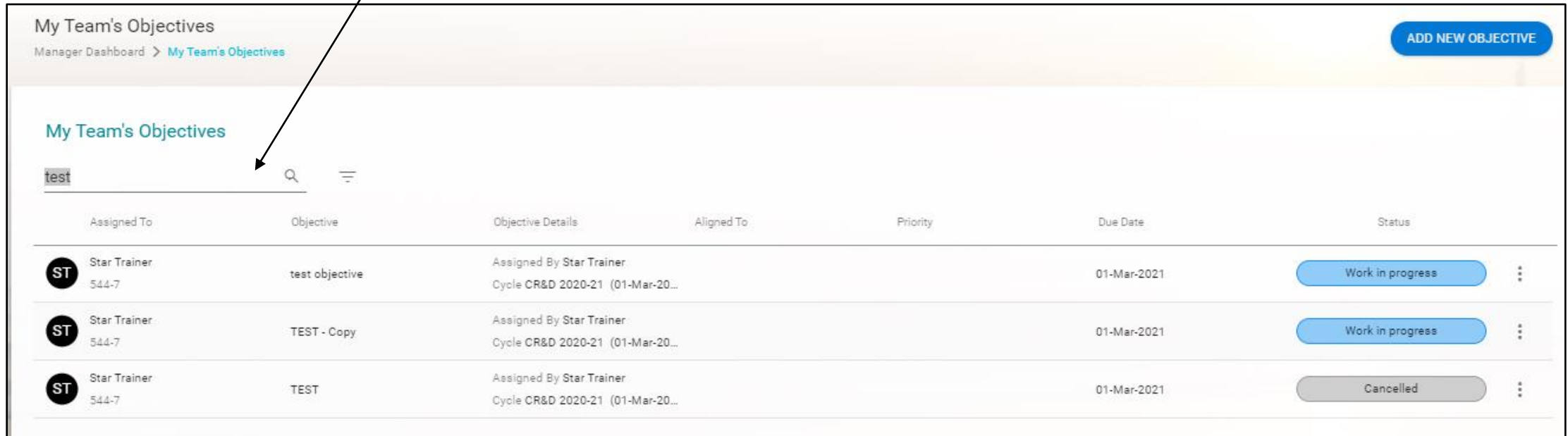
Assigned To	Objective	Due Date	Status
 Star Trainer 544-7	test objective	01-Mar-2021	Work in progress
 Star Trainer 544-7	TEST - Copy	01-Mar-2021	Work in progress
 Star Trainer 544-7	TEST	01-Mar-2021	Cancelled

1 - 3 of 5 < >

In **My Team's Objectives** window you can either choose to view all objectives set for the team by clicking on **VIEW ALL button** or click **ADD NEW OBJECTIVE** to create new objective.



Search functionality in 'My Teams Objectives' allows manager to see a list of employees that were assigned this objective.



The screenshot displays the 'My Team's Objectives' page. At the top, there is a breadcrumb trail 'Manager Dashboard > My Team's Objectives' and an 'ADD NEW OBJECTIVE' button. Below the title, a search bar contains the text 'test'. A table lists three objectives assigned to 'Star Trainer' (ID 544-7). The first two are 'Work in progress' and the third is 'Cancelled'. An arrow points from the search bar to the first row of the table.

Assigned To	Objective	Objective Details	Aligned To	Priority	Due Date	Status
Star Trainer 544-7	test objective	Assigned By Star Trainer Cycle CR&D 2020-21 (01-Mar-20...			01-Mar-2021	Work in progress
Star Trainer 544-7	TEST - Copy	Assigned By Star Trainer Cycle CR&D 2020-21 (01-Mar-20...			01-Mar-2021	Work in progress
Star Trainer 544-7	TEST	Assigned By Star Trainer Cycle CR&D 2020-21 (01-Mar-20...			01-Mar-2021	Cancelled





In addition, manager can filter objectives by employee's name or status of objectives. Click on filter sign and this will bring an option to set required filter.

The screenshot displays a 'Manager Dashboard' with a section titled 'My Team's Objectives'. A search bar contains the text 'test'. A filter icon (three horizontal lines) is visible next to the search bar. A modal window titled 'Filter' is open, showing options to filter by employee and status, and a toggle for 'Include historical data'. The background table lists objectives with columns for 'Assigned To', 'Objective', 'Objective Details', 'Due Date', and 'Status'.

Assigned To	Objective	Objective Details	Due Date	Status
Star Trainer 544-7	test objective	Assigned By Star Trainer Cycle CR&D 2020-21 (01-	01-Mar-2021	Work in progress
Star Trainer 544-7	TEST - Copy	Assigned By Star Trainer Cycle CR&D 2020-21 (01-	01-Mar-2021	Work in progress
Star Trainer 544-7	TEST	Assigned By Star Trainer Cycle CR&D 2020-21 (01-	01-Mar-2021	Cancelled

