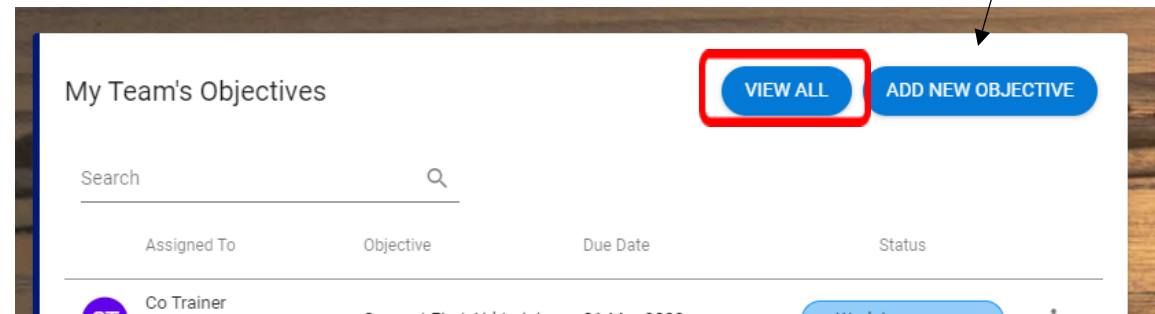
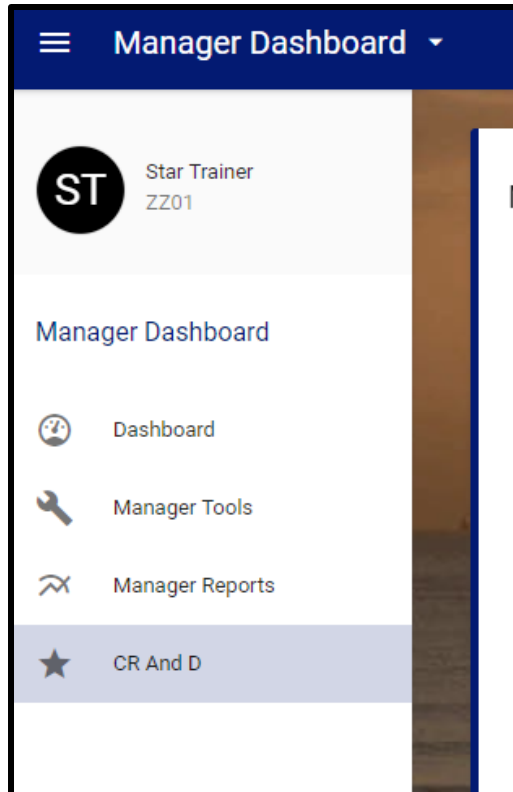


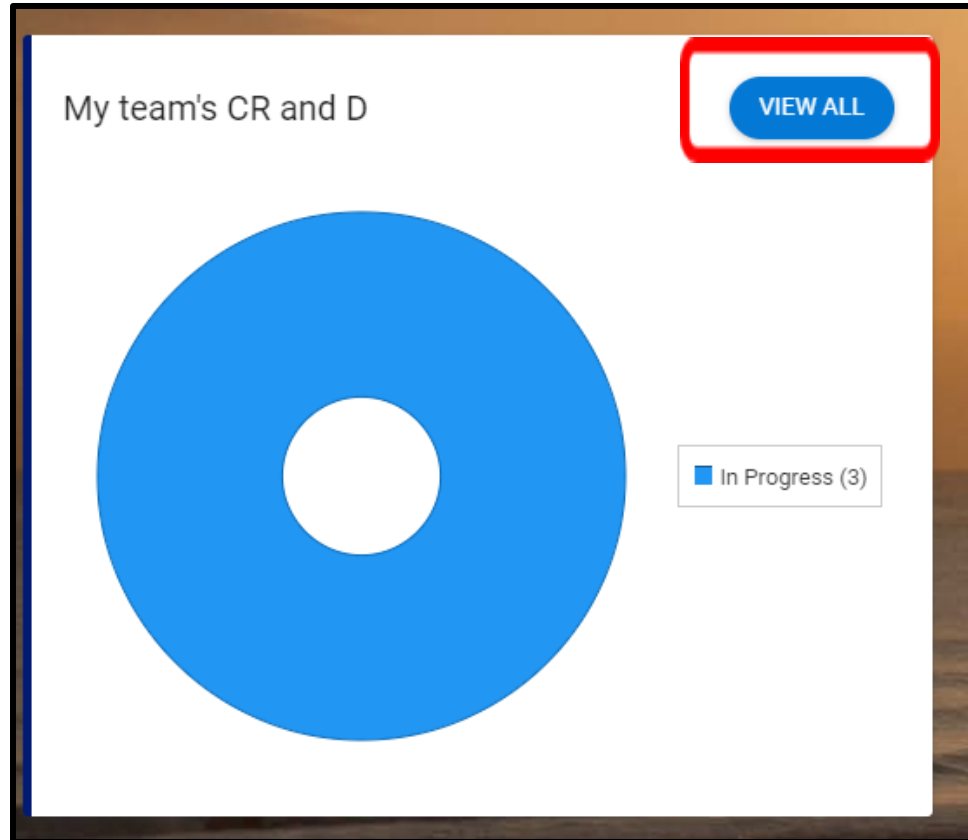
**H O W T O  
A C C E S S A N D  
M A N A G E  
E M P L O Y E E ' S  
O B J E C T I V E S**

GUIDE FOR MANAGER

Once you are in the **Manager's Dashboard**, click on the CR&D option at the bottom left of the screen or the star icon. Two options of managing objectives will display: My Team's CR&D and My Teams Objectives widget. Both options can be used for viewing objectives set for each employee. In addition, My Team's Objectives widget gives you an option to assign new objectives.



To view your teams objectives in 'My Team's CR and D' window , click on **VIEW ALL** button.



In the search box enter employee's name – this will populate all elements of CR&D for this employee

Manager Dashboard

My Team Appraisals  
Manager Dashboard > My Team Appraisals

Direct Appraisals Indirect Appraisals Calibration

Co Trainer

CT	Co Trainer Department Business Support	Appointment 502360-21 Job title Admin Assistant	STEP 1 - Objectives and Progress Review 2021/22	Objectives and Progress Review 2021/22 Awaiting Employee Action	01-Mar-2022 Stage Due Date	⋮ Launch Print Review
CT	Co Trainer Department Business Support	Appointment 502360-21 Job title Admin Assistant	STEP 2 - Capability Framework 2021/22	Capability Framework 2021/22 Awaiting Employee Action	01-Mar-2022 Stage Due Date	⋮
CT	Co Trainer Department Business Support	Appointment 502360-21 Job title Admin Assistant	STEP 3 - Development Plan 2021/22	Development Plan Awaiting Employee Action	01-Mar-2022 Stage Due Date	⋮

Launch the **Step 1 - Objectives and Progress Review 2021/22** by clicking on the ellipsis and then clicking **Launch**.



On the first page manager can see list of objectives added by the team member. This is a **view only option** and no new objectives can be added by yourself as the manager here.

The screenshot displays the 'My Team Appraisals' interface. At the top, there is a navigation bar with a back arrow and the title 'My Team Appraisals'. Below this, the main heading is 'STEP 1 - Objectives and Progress Review 2021/22 (Co Trainer - 502360-21)'. A breadcrumb trail shows 'Manager Dashboard > My Team Appraisals > STEP 1 - Objectives and Progress Review 2021/22...'. On the left, a sidebar menu includes 'OBJECTIVES AND PROGRESS REVIEW 20...', 'Add Your Work Objectives Here' (highlighted), 'Review Overall Progress', 'Performance And Conduct', and 'Sign Off (1st March 2022)'. The main content area is titled 'Add your work objectives here' and contains a detailed instruction: '\*\*If you are an employee -click on Add Smart Objective Button\*\* This section is for recording the detail of individual objectives and managing the progress of each one. Use the following descriptions to update the status. - Exceptional - I'm successfully achieving the objective to a standard well beyond what was expected - Successfully achieving - I'm on track to successfully achieving the objective or the agreed milestone for this timescale - Developing - I'm on track to achieving the objective but with areas that require improvement or some milestones for this timescale have not been met - Not achieving - My performance in this area consistently falls below the standard expected and this has been discussed with me - Not applicable - Progress on the objective or milestones was not possible due to factors outwith my control'. Below the text is a search bar and a table of objectives. The table has columns for Objective, Assigned To, Objective Details, Aligned To, Priority, Due Date, and Status. Three objectives are listed: 'Support First Aid training roll...' (Work in progress), 'Ensure training records are k...' (Draft), and 'Dealing with queries' (Work in progress).

Objective	Assigned To	Objective Details	Aligned To	Priority	Due Date	Status
Support First Aid training roll...	Co Trainer 502360-21	Assigned By Co Trainer Cycle CR&D 21/22 - Work Obj...			01-Mar-2022	Work in progress
Ensure training records are k...	Co Trainer 502360-21	Assigned By Star Trainer Cycle CR&D 21/22 - Work Obj...			01-Mar-2022	Draft
Dealing with queries	Co Trainer 502360-21	Assigned By Co Trainer Cycle CR&D 21/22 - Work Obj...			01-Mar-2022	Work in progress



My Team Appraisals

STEP 1 - Objectives and Progress Review 2021/22 (Co Trainer - 502360-21)

Manager Dashboard > My Team Appraisals > STEP 1 - Objectives and Progress Review 2021/22...

OBJECTIVES AND PROGRESS REVIEW 20... Add your work objectives here

Add Your Work Objectives Here

Review Overall Progress

Performance And Conduct

Sign Off (1st March 2022)

\*\*If you are an employee-click on Add Smart Objective Button\*\* This section is for recording the detail of individual objectives and managing the progress of each one. Use the following descriptions to update the status - Exceptional - I'm successfully achieving the objective to a standard well beyond what was expected - Successfully achieving - I'm on track to successfully achieving the objective or the agreed milestone for this timescale - Developing - I'm on track to achieving the objective but with areas that require improvement or some milestones have not been met - Not achieving - My performance in this area consistently falls below the standard expected and this has been discussed with me - Not applicable - Progress on the objective or milestones was not possible due to factors outwith my control

Search

Objective	Assigned To	Objective Details	Aligned To	Priority	Due Date	Status
Support First Aid training roll...	Co Trainer 502360-21	Assigned By Co Trainer Cycle CR&D 21/22 - Work Obj...			01-Mar-2022	Work in progress
Ensure training records are k...	Co Trainer 502360-21	Assigned By Star Trainer Cycle CR&D 21/22 - Work Obj...			01-Mar-2022	Developing
Dealing with queries	Co Trainer 502360-21	Assigned By Co Trainer Cycle CR&D 21/22 - Work Obj...			01-Mar-2022	Work in progress

Open an objective by clicking on the ellipsis against that objective and then **Open Objective**.

Once objective is open, you will be able to see full description for the objective and add additional information/comments and milestones.

STEP 1 - Objectives and Progress Review 2021/22 (Co Trainer - 502360-21)

Support First Aid training roll out

Manager Dashboard > My Team Appraisals > STEP 1 - Objectives and Progress Review 2021/22... > Support First Aid training roll out

OBJECTIVE STATUS: Work in progress

Objective type Work Objectives inc Core Manager (if applicable)

Objective title Support First Aid training roll out

Additional Information (Optional)

Comments

Milestones

Description

- Ensure dates are added to Eventbrite booking system
- Check PO has been raised
- Dealing with queries related to First Aid in mailbox

96% remaining

Start Date 01-Mar-2021 End Date 01-Mar-2022 Visibility Confidential Objective Current Status Developing

access PeopleXID

SAVE



Under this section, you are able to view and add additional information/comments and milestones against that specific objective.

In the **Additional Information** tab you will be able to view and add to the information your member of staff had previously entered when first creating the objective by using the **SMART builder**. You can also edit the information or add to it on this screen by typing directly into the fields.

The screenshot displays a mobile application interface for managing objectives. The top navigation bar is dark blue with a back arrow, the text 'STEP 1 - Objectives and Progress Review 2021/22 (Co Trainer - 502360-21)', and a user icon labeled 'ST'. Below the navigation bar, the page title is 'Support First Aid training roll out', followed by a breadcrumb trail: 'Manager Dashboard > My Team Appraisals > STEP 1 - Objectives and Progress Review 2021/22... > Support First Aid training roll out'. A blue 'ACTIONS' button is located in the top right corner.

The main content area is divided into a left sidebar and a main editing area. The sidebar contains four tabs: 'Description', 'Additional Information (Optional)', 'Comments', and 'Milestones'. The 'Additional Information (Optional)' tab is currently selected. The main editing area is titled 'Optional Objective Information' and contains two text input fields, each with a rich text editor toolbar. The first field is labeled 'What might prevent you from achieving this?' and contains the text 'Conflicting work priorities'. The second field is labeled 'How does this contribute to your overall team/service purpose?' and contains the text 'Ensures relevant staff are trained'. A '99% remaining' indicator is visible in the bottom right corner of the second field's editor.



Comments can be added by clicking on the **View/Add** button. You will also be able to view any comments made by the employee.

\*\*\*The **Actions** button at the top right hand corner of the screen brings a drop down option. The **View Activity Log** allows you and your member of staff to view a history of changes made to all sections of the smart objective.\*\*\*

STEP 1 - Objectives and Progress Review 2021/22 (Co Trainer - 502360-21)

Support First Aid training roll out

Manager Dashboard > My Team Appraisals > STEP 1 - Objectives and Progress Review 2021/22... > Support First Aid training roll out

Actions

VIEW/ADD

Description	Comments
Additional Information (Optional)	
Comments	
Milestones	

Posted By	Comment	Date
Star Trainer	Great feedback from customers	08-Jun-2021 09:44
Co Trainer	Project plan completed to update on regular basis	07-Jun-2021 15:28

New Comment

Comment\*

CANCEL OK







**Milestones** can be viewed and edited in the same way as **Additional Information**. Choose the **Milestone** tab and you will be able to view the information regarding milestones. You can also add information by clicking on the ellipsis and then selecting **Edit Milestone**.

← STEP 1 - Objectives and Progress Review 2021/22 (Co Trainer - 502360-21) ST

Support First Aid training roll out ACTIONS ▾

Manager Dashboard > My Team Appraisals > STEP 1 - Objectives and Progress Review 2021/22... > Support First Aid training roll out

Description **Milestones**

Additional Information (Optional) ADD

Comments

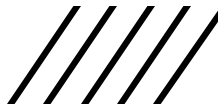
Milestone	Due Date	Completed On	Status
Carry out training audit	16-Aug-2021		Developing <span>⋮</span>
All refresher training completed	27-Sep-2021		Developing <span>⋮</span>

**Milestones**

Edit milestone  
Delete milestone

SAVE

access People360



**Please note:** if employee missed out on filling in **Milestones**, then you can add the information by choosing **Milestones**. Click **ADD** and complete the required information in the pop up box like the one below.

The screenshot displays a software interface for managing objectives and progress reviews. The main header reads "STEP 1 - Objectives and Progress Review 2021/22 (Co Trainer - 502360-21)". The current objective is "Support First Aid training roll out". A modal window titled "New Milestone" is open, containing the following fields:

- Title\***: Select the title of this milestone
- Due Date**: Select the due date of this milestone (with a calendar icon)
- Completed Date**: Select the completed date of this milestone (with a calendar icon)
- Milestone Status**: Select the status of this milestone (with a dropdown arrow)

At the bottom of the modal are "CANCEL" and "OK" buttons. In the background, a table lists existing milestones with columns for "Due Date", "Completed On", and "Status". The "ADD" button in the top right corner of the main interface is highlighted with a red box. The "SAVE" button is visible at the bottom right of the page.



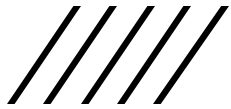
Back in the **Manager Dashboard**, there is a box that allows you to manage your team's objectives. To assign an objective to your team, click on the **Add New Objective button**.

My Team's Objectives

VIEW ALL ADD NEW OBJECTIVE

Search

Assigned To	Objective	Due Date	Status
Co Trainer 502360-21	Support First Aid trainin...	01-Mar-2022	Work in progress
Co Trainer	Ensure training records ...	01-Mar-2022	Draft



You can only add a basic objective rather than a SMART one. Complete the information about the objective on the screen and then select the individuals this objective would apply to. Please note that you can assign this objective to more than one person in your team. In order to do this, highlight the name of the individual and click on the arrows to move the individuals across to Assigned. Once you are done, click **Save**.

← Manager Dashboard ST

### Create new Objective

Manager Dashboard > Create new Objective

Objective title\*

Objective cycle\* CR&D 21/22 - Work Objectives (01-M...

Objective type\* actives inc Core Manager (if applicable)

Start Date\* 01-Mar-2021

End Date\* 01-Mar-2022

When will this objective start

When will this objective end


Available Assigned

Co Trainer - Admin Assistant (502360-21)

access PeopleXD

SAVE





**REVIEW  
OVERALL  
PROGRESS/  
PERFORMANCE  
AND CONDUCT/  
SIGN OFF**



The **Review Overall Progress** section allows you to add an **Overall Confirmed Rating** for all employee's objectives. The first question is answered by employee, the second question is completed by yourself to confirm the agreed rating once you have had a conversation with the individual.

The screenshot displays a mobile application interface for 'My Team Appraisals'. The top navigation bar is dark blue with a back arrow and the text 'My Team Appraisals'. Below this, a breadcrumb trail reads: 'Manager Dashboard > My Team Appraisals > STEP 1 - Objectives and Progress Review 2021/22...'. The main content area is titled 'STEP 1 - Objectives and Progress Review 2021/22 (Co Trainer - 502360-21)'. On the left, a sidebar menu lists: 'OBJECTIVES AND PROGRESS REVIEW 20...', 'Review Overall Progress' (highlighted), 'Performance And Conduct', and 'Sign Off (1st March 2022)'. The main content area is titled 'Review Overall Progress' and contains three sections: '2. Confirmed Rating' with a description 'This section is to capture overall confirmed rating as agreed by both parties.', 'Co Trainer' with a note 'This section is for Manager only', and 'Star Trainer' with a dropdown menu 'Enter a Rating\*' set to 'Successfully Achieving'. Below these is an 'Additional comments' section with a text area and a rich text toolbar. At the bottom, there is a 'SAVE' button and the 'access PeopleXD' logo.





The **Performance and Conduct** section requires the Manager to confirm whether an employee is subject to either Managing Performance or Managing Discipline Policies. The Manager should enter the response before clicking save. Please note you will not be able to complete Sign Off until this has been entered.

← My Team Appraisals

STEP 1 - Objectives and Progress Review 2021/22 (Co Trainer - 502360-21)  
Manager Dashboard > My Team Appraisals > STEP 1 - Objectives and Progress Review 2021/22...

OBJECTIVES AND PROGRESS REVIEW 20...  
Add Your Work Objectives Here  
Review Overall Progress  
Performance And Conduct  
Sign Off (1st March 2022)

### Performance and Conduct

Increments will be applied to eligible staff if they are overall "Successfully achieving" in Work Objectives and Capability Framework Knowledge, Skills and Behaviours by March 2022 and have not reached stage 1 of the Managing Performance Policy or been issued with any disciplinary sanction under the Managing Discipline Policy.

\*\*\*Please Note\*\*\* An increment will not be applied if, on the 1st March the employee is under investigation for a matter relating to conduct. If, however, the result of the investigation exonerates the employee at a subsequent date, then the increment will be applied with effect from the 1st April.

1. This section is to be completed by the manager

During the 2021/22 CR&D Cycle has the employee been subject to any of the following?

- 1) Reached stage 1 of the Managing Performance Policy
- 2) Been issued a first level warning or higher disciplinary sanction under the Managing Discipline Policy

Co Trainer  
This section is for Manager only

Star Trainer  
Enter a Rating \*

Yes - currently under one of the above  
None

access PeopleXD

SAVE

Select response from the drop down here then click Save







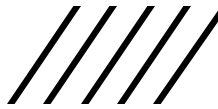
The employee has to **Sign Off** first before the manager.

By clicking on the **Sign off** button, you will receive a prompt to input your CoreHR password.

The **Send Back** button allows you to return the review to your employee for amendment, if required, before you sign off

The screenshot shows a web browser window with the URL `uatmy.corehr.com/pls/coreportal_aberdu/i#MgrM...`. The page title is "My Team Appraisals". The main content area is titled "STEP 1 - Objectives and Progress Review 2021/22 (Co Trainer - 502360-21)". Underneath, there is a section for "OBJECTIVES AND PROGRESS REVIEW 2021/22" with a sub-section "Sign Off (1st March 2022)". This section contains instructions: "\*\*You need to complete sign off first before your manager\*\*" and "Although, continuous review and development is an ongoing process, for reporting purposes, there needs to be an annual sign off. This should be completed prior to 1 March 2022." Below the instructions, there are two columns: "Co Trainer" and "Star Trainer". The "Co Trainer" column shows "Stage successfully signed off on 15-Jun-2021". The "Star Trainer" column shows "Requires CoreHR password authentication". At the bottom of the page, there are two buttons: "SIGN OFF" (green) and "SEND BACK" (red).

The modal dialog box is titled "Confirm Password". It contains a password input field with a red asterisk and a red underline. Below the input field, there is a red error message: "This field is required". At the bottom right of the dialog, there are two buttons: "CANCEL" and "OK".





**OTHER  
ADDITIONAL  
FEATURES**

At the top of the screen, there is an Action button which allows you to view the **Activity** Log for the current objective.

STEP 1 - Objectives and Progress Review 2021/22 (Co Trainer - 502360-21)

### Support First Aid training roll out

Manager Dashboard > My Team Appraisals > STEP 1 - Objectives and Progress Review 2021/22... > Support First Aid training roll out

Objective type Work Objectives Inc Core Manager (if applicable) Work in progress

Objective title  
Support First Aid training roll out

Description

- Ensure dates are added to Eventbrite booking system
- Check PO has been raised
- Dealing with queries related to First Aid in mailbox

96% remaining

Start Date: 01-Mar-2021 | End Date: 01-Mar-2022 | Visibility: Confidential | Objective Current Status: Developing

This objective is Work in progress.





# The **Activity Log** details all the updates and changes made by employee and manager in all sections of the smart objective.

Activity Log			
Manager Dashboard > My Team Appraisals > STEP 1 - Objectives and Progress Review 2021/22... > Support First Aid training roll out > Activity Log			
Activity Log			
Action By	Action	Activity	Update at
Star Trainer	updated the Due Date for the Milestone All refresher training completed to	27/Sep/2021	08-Jun-2021 09:46
Star Trainer	marked the Milestone Carry out training audit as complete on		08-Jun-2021 09:46
Star Trainer	created a new Milestone named	Carry out training audit	08-Jun-2021 09:45
Star Trainer	commented	Great feedback from customers	08-Jun-2021 09:44
Co Trainer	updated the Work In Progress Status to	Developing	07-Jun-2021 15:35
Co Trainer	created a new Milestone named	All refresher training completed	07-Jun-2021 15:29
Co Trainer	commented	Project plan completed to update on regular basis	07-Jun-2021 15:28
Co Trainer	updated the Status from	Draft to Work in progress	07-Jun-2021 15:28
Co Trainer	created this objective		07-Jun-2021 15:27

