

# MANAGER GUIDE

## **INFOR PERFORMANCE APPRAISALS**

## **Step-by-Step Guide**



## Revised 12.12

learningcc.org

🕐 pe

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#### SECTION 1 PERFORMANCE APPRAISAL PROCESS OVERVIEW

Looking for timelines, information on our rating scale, or eligibility? Start here.

#### SECTION 2 WORKFLOW

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#### SECTION 3 NEW APPRAISAL NAVIGATION GUIDE

Check out this section to view step-by-step instructions on creating a performance appraisal and submitting it to your Upline Manager.

#### SECTION 4 CONTINUING APPRAISAL NAVIGATION GUIDE

Did you create draft appraisals during October? Start here to continue the steps.

#### **SECTION 5** UPLINE APPROVAL GUIDE

Do you manage other managers? You'll likely need to approve performance appraisals submitted by them. Get step-by-step instructions on how to approve here.

#### SECTION 6 MANAGER FINAL STEPS

All front-line managers must complete these steps after upline approval.

#### **APPENDIX 1** EXTRA HELP NAVIGATING THE INFOR LAYOUT

Want to learn more about various buttons and how to view the performance appraisal in it's final form? View the appendix.

#### FY 2024 Performance Review Overview

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TIP: NOT SURE WHEN A SECTION ENDS? EACH SECTION BEGINS WITH PAGE 1 AND HAS A UNIQUE TITLE LISTED ON THE BOTTOM HEADER.



## **TIMELINE & KEY DATES**

#### **SEPTEMBER 27TH - OCTOBER 9TH**

200 & 300 level employees may complete a voluntary self -assessment form. These forms are turned in **directly** to the **<u>supervisor</u>** and are due no later than **October 9th.** 

#### **OCTOBER 7TH**

Departments will begin working on Evaluation Spreadsheets (sent to Directors). Supervisors may begin creating draft evaluations in Infor. Do not submit for upline approval until ELT has reviewed and finalized **(Late Nov/Early Dec)**.

#### **NOVEMBER 1ST**

Department Evaluation Spreadsheets with proposed rating for each employee are due to Human Resources. Must be submitted by Director or designee.

#### **DECEMBER 2ND**

Performance Evaluation sheets are returned to departments with edits. After clearance from Director, the supervisors may begin meeting with Employees and submitting reviews for upline approval in Infor.

#### **DECEMBER 16TH**

All performance conversations should have been held with employees. Deadline for Employee Acknowledgment in Infor

#### JAN 1, 2025

Merit Raises will take effect. (HR will do Form 12s this year). First paycheck with merit raises will be Jan 17th.

#### JAN 17, 2025

First paycheck with merit raises will be Jan 17th.

FY 2024 Performance Review Overview



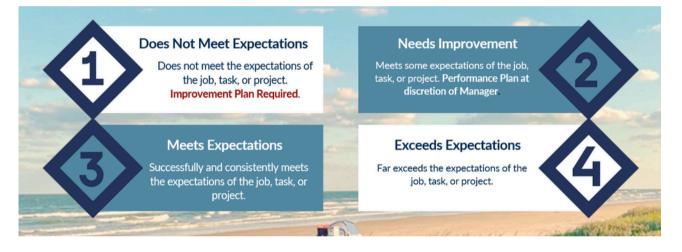


## **OVERVIEW OF PERFORMANCE APPRAISALS**

## **ELIGIBILITY**

- ALL FULL-TIME & PART TIME CIVILIAN EMPLOYEES
- HIRED ON OR BEFORE 03/31/2024
- FORM MUST BE COMPLETED BY CURRENT, IMMEDIATE SUPERVISOR

### **RATING SCALE**



## **PIPS (PERFORMANCE IMPROVEMENT PLANS)**

GIVEN WHEN THE OVERALL RATING IS A 1.

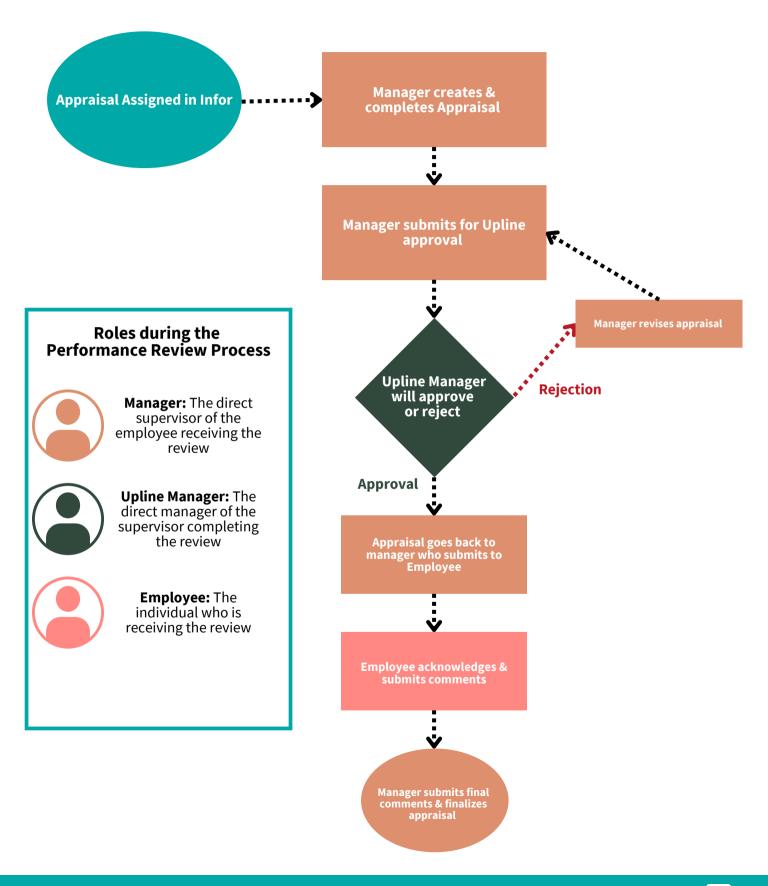
SUPERVISORS MUST COORDINATE WITH EMPLOYEE RELATIONS

FORM MUST BE SEPARATE DOCUMENT FROM APPRAISAL
 IMPROVEMENT PLANS SHOULD NOT BE WRITTEN WITHIN THE APPRAISAL DOCUMENTS.

**ORGANIZATIONAL DEVELOPMENT** CAN ASSIST WITH ASSIGNING/RECOMMENDING TRAININGS, IF NEEDED.

## WORKFLOW

#### Questions? Email performancereviews@cctexas.com

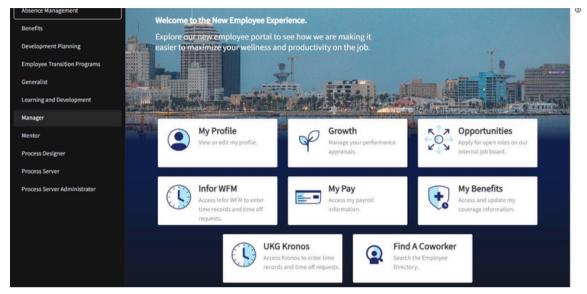


## USE THESE INSTRUCTIONS FOR NEW APPRAISALS



## IF YOU HAVEN'T ENTERED ANY DATA IN, THIS SECTION IS FOR YOU

## **FIRST STEP: LOGIN INTO INFOR**



**Diagram 1 : Infor Landing Page** 

## **CLICK ON "EMPLOYEE"**

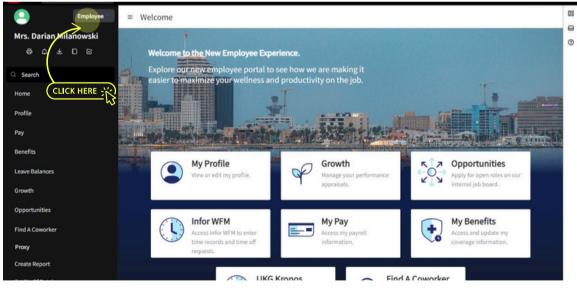


Diagram 2 : Left Hand Bar Dropdown

#### Infor User Guide - FY 2024





SCAN CODE FOR MORE INFORMATION AND TO WATCH AN INSTRUCTIONAL VIDEO



## ON YOUR DROPDOWN MENU, CLICK ON "MANAGER"

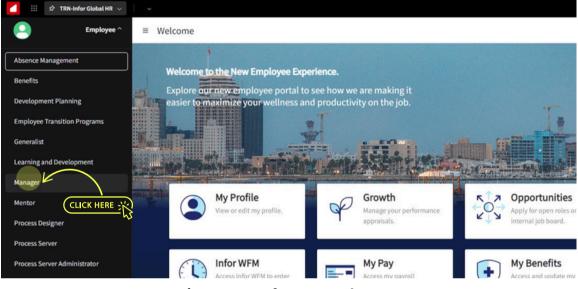


Diagram 3 : Left-Bar Dropdown Menu

## **CLICK ON "REVIEW PERFORMANCE"**

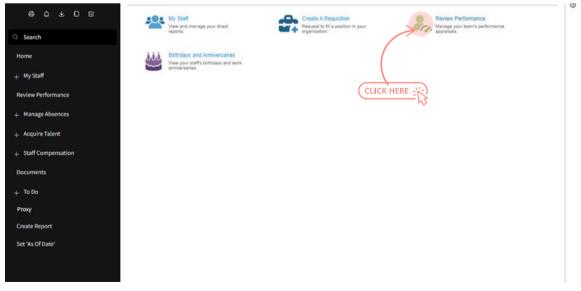


Diagram 4 : Manager Space

# III NO REVIEWS? CLICK REFRESH GO SEE REVIEWS? SKIP TO NEXT STEP

ł	All Assigned To Me	My Staff	Reassigned	By Status	Completed	Rating Distribution				ſ
	Last Name			First Name			Employment	tID		
	(A) *			(A) *			= *	Fà		
	Appraisal			Status			Due Date			
	* [A]	ΤQ			Ψ.		= *	8		
									Clear	Sea
	Name ‡	Appraisal	Due Date		Status	Next Step	Manager	Appraisal Owner	Estimated	% Co

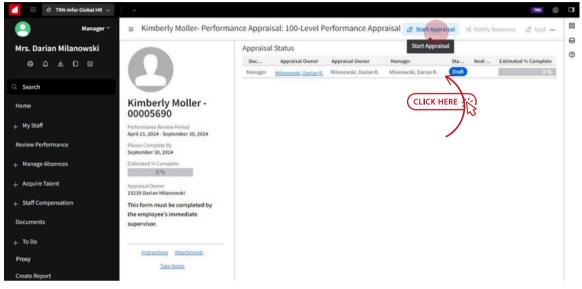
**Diagram 5 : Performance Dashboard** 

## **DOUBLE-CLICK ON THE EMPLOYEE**

8 ¢ 7 D &						🖉 Start Appraisal	A Consol	idated Apprais	al
Search	Last Name		First Name			Employment ID			
	(A) *		(A) *			= *	50		
Home	Appraisal		Status			Due Date			
+ My Staff	(A) =	Tig.		· · ·		= *	8		
+								Clear	Search
Review Performance	Name ‡	Appraisal	Due	Draft Next	Manager	Appraisal Owner	Estimated %		Jearch
+ Manage Absences	Moller, Kimberly D.	100-Level Performance Appraisal	0 9/30	Draft	Milanowski, Darian R.	Milanowski, Darian R.		0%	
+ Staff Compensation	Appraisal Status	CLICK HERI							5 *
+ To Do	Document Type	Appraisal Owner App	oraisal Owner	Manager	Si	tatus Next Step		Estimated % C	omplete
Proxy									
Create Report Set 'As Of Date'									
				No Data A	wailable				



## **CLICK "START APPRAISAL"**



**Diagram 7: Employee Performance Start Screen** 

### SELECT THE RATING FOR EACH CRITERIA. ALL CRITERIA MUST HAVE A RATING TO SUBMIT.

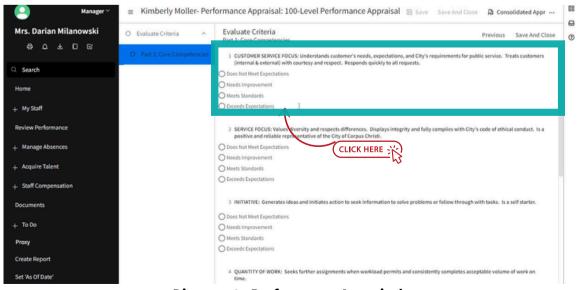
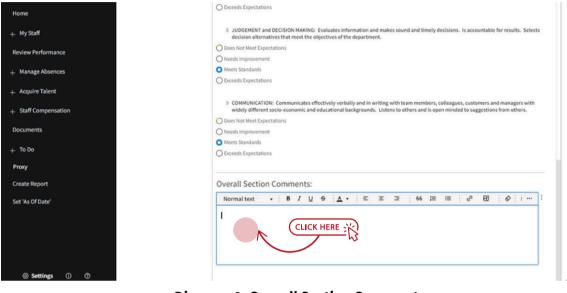


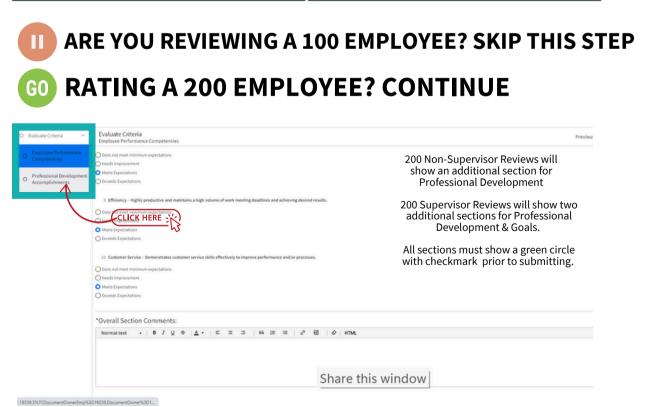
Diagram 8 : Performance Appraisals

## **INFOR NAVIGATION GUIDE**

#### AT THE BOTTOM - CLICK IN THE TEXTBOX FOR "OVERALL SECTION COMMENTS". <u>SECTION COMMENTS ARE MANDATORY</u>; HOWEVER; YOU MAY ELECT TO KEEP SECTION COMMENTS BRIEF.



**Diagram 9: Overall Section Comments** 



**Diagram 10: Section Box** 

#### WHEN YOU ARE DONE, CLICK SAVE AND CLOSE.

valuate Criteria ^	Evaluate Criteria Professional Development Accomplishments	
Employee Performance Competencies	1 Achievement 1	
Professional Development	Normaltext - B / U ⊕ A - E Ξ Ξ 66 3≣ 1≣ c <sup>0</sup> 83 ♦ HTML	
Accomplishments	This is required.	WHEN YOU ARE
		DONE YOU CAN
		<b>CLICK SAVE OR</b>
		SAVE AND CLOSE
	2 Achievement 2	
	Normaltext • B I U ⊕ A • E Ξ Ξ 66 lΞ ⊞ 8 <sup>0</sup> 🔂 ♦ HTML	
	this is required	

**Diagram 11: Saving Performance Reviews** 

#### TO VIEW CALCULATED SCORE CLICK ON "CONSOLIDATED

**APPRAISAL"** If nothing loads, please disable pop-up blocker.

100 Performance Appraisal			Consolidated Appraisal	Instructions	View Employ	yee Details	
					Previous	Save And C	lose
icates effectively verbally and in writing with te minded to suggestions from others.	am members,	colleagues, customers	and managers with widely differe	ent socio-economi	c and educationa	al backgrounds	5.

Diagram 12: Consolidated Appraisal Button

#### YOUR SCORE SHOULD AUTO-CALCULATE THE RAW SCORE & FINAL OVERALL RATING

IF THE OVERALL RATING SAYS "O -", PLEASE CALL HR FOR ASSISTANCE.

Rating Summary: 4-Exceeds Expectations,3-Meets Standard,2-Needs Improvement,1-Does Not Meet Expectations
Overall Calculated Scores
Section         Score         W           Part 1: Core Competencies         3.88         10

Diagram 13: Viewing the Overall Rating

#### **CLICK ON SUBMIT TO ENTER PRE-UPLINE APPROVAL**

**STATUS** This will not submit to your upline manager, you can still edit if needed

🖉 Continue Appraisal	✓ Submit	→) Notify Resourc	e 🖉 Update Overall Ratii
	Status	Next Step	Estimated % Complete
)arian R.	In Progress		

Verify the estimated completion is at 100%. If not, click continue appraisal and ensure all sections are completely filled out. When you're ready, click submit.

THE STATUS SHOULD CHANGE TO "READY FOR REVIEW"

**Diagram 14: Submission Screen** 



#### **CLICK SUBMIT TO UPLINE MANAGER**

e Review	S Revert To In Progress	→] Notify Resource 2	HERE Sating	Submit To Upline Manager
Appraisal Owner	Manager	Status	Next Step	Estimated % Complete
Milanowski, Darian R.	Milanowski, Darian R.	Ready For Review		10

THE STATUS SHOULD CHANGE TO "READY FOR REVIEW"

Diagram 15: Upline Manager

#### WHEN SUCCESSFULLY SUBMITTED, THE STATUS WILL TURN ORANGE. NOW YOU WILL WAIT FOR UPLINE APPROVAL.



**Diagram 16: Upline Approval Success** 

## USE THESE INSTRUCTIONS FOR DRAFT APPRAISALS

## TO BE CONTINUED ..

## IF YOU ALREADY ENTERED IN DATA AND SAVED, THIS SECTION IS FOR YOU

#### NAVIGATE TO MANAGER -> REVIEW PERFORMANCE -> MY STAFF

8	Manager	0	■ Review Performance									R	ð (
Q	Search		All Assigned To Me My Staff Reas	signed By Status Con	npleted Rating C	Distribution							
	My Staff	v	🕄 Create Appraisal 🛛 …	Active Ready For Rev	iew Pending Acl	knowledgment	t Comp	pleted					
	Review Performance		Q. Search by Name						0.5	Start Appraisal	😼 Submit	D Consolidated Appraisal	
	Manage Absences	v	Moller, Kimberly D. Organizational Development	Appraisal		Due Date 🌣	Status	Next Step	Appraisal Owner	Estin	nated % Complete		_
	Acquire Talent	v		FY24 100 Performance Apprais	sal 1	1/6/2025	Draft		Milanowski, Darian R.			100 %	
	Staff Compensation	¥											
	Documents											1	5 •
	To Do	v		Appraisal Status									
				Document Type	Appraisal Owner	Appraisal O		Manager		Status	Next Step	Estimated % Comp	dete

Diagram 1 : My Staff Tab

## SELECT THE EMPLOYEE AND CLICK ON START APPRAISAL

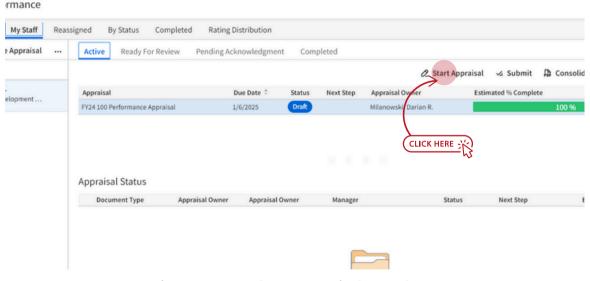


Diagram 2 : Employee Appraisal Launch Page







SCAN CODE FOR MORE INFORMATION AND TO WATCH AN INSTRUCTIONAL VIDEO ×

#### VERIFY ALL INFORMATION IS CORRECT AND THEN CLICK "SAVE AND CLOSE"

😑 Kimberly Moller- Performance Appraisal: FY24 100 Performance Appraisal 🛛 Sever Save And Clear 🔒 Consolidated Appraisal Instructions View Employee Details …

⊘ Evaluate Criteria ^	Evaluate Criteria Part 1: Core Competencies Previous Save And Close
<ul> <li>Part 1: Core Competencies</li> </ul>	1 CUSTOMER SERVICE FOCUS: Understands customer's needs, expectations, and City's requirements for public service. Treats customers (internal & external) with courtesy and respect. Responds quickly to all requests.
	Needs significant improvement
	O Needs Improvement
	O Meets Standards CLICK HERE 🔆
	O Fully Exceeds Expectations
	SERVICE FOCUS: Values diversity and respects differences. Displays integrity and fully complies with City's code of ethical conduct. Is a positive and reliable representative of the City of Corpus Christi.     Needs significant improvement     Meets Standards     Fully Exceeds Expectations
	3 INITIATIVE: Generates ideas and initiates action to seek information to solve problems or follow through with tasks. Is a self starter.
	O Needs significant improvement
	O Needs Improvement

#### **Diagram 3 : Employee Appraisal Screen**

## CLICK ON SUBMIT AND THEN ENTER IN TODAY'S TODAY.

Assigned To Me My	Staff Reassigned By Status Completed Ri	ating Distribution			1999 - N. S.
🕄 Create App	Active Ready For Review Pendi				
arch by Name			🖉 Start Appraisal	🛃 Submit 🔒	Consolidated Appraisal
Moller, Kimberly D. Organizational Developer Submit Appraisal By submitting this appraisal, the appraisal can be submitted to the uplit Meeting Date		to the upline manager for approval. Click Submit to confirm.	rian R.	CK HERE	100 %
			Status	Next Step	Estimated % Complete
	Cancel	Submit			

Diagram 4 : Submit Appraisal Process







SCAN CODE FOR MORE INFORMATION AND TO WATCH AN INSTRUCTIONAL VIDEO \*

#### VERIFY ALL INFORMATION IS CORRECT AND THEN CLICK "SAVE AND CLOSE"

😑 Kimberly Moller- Performance Appraisal: FY24 100 Performance Appraisal 🛛 Sever Save And Clear 🔒 Consolidated Appraisal Instructions View Employee Details …

⊘ Evaluate Criteria ^	Evaluate Criteria Part 1: Core Competencies Previous Save And Close
<ul> <li>Part 1: Core Competencies</li> </ul>	1 CUSTOMER SERVICE FOCUS: Understands customer's needs, expectations, and City's requirements for public service. Treats customers (internal & external) with courtesy and respect. Responds quickly to all requests.
	Needs significant improvement
	O Needs Improvement
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	O Fully Exceeds Expectations
	SERVICE FOCUS: Values diversity and respects differences. Displays integrity and fully complies with City's code of ethical conduct. Is a positive and reliable representative of the City of Corpus Christi.     Needs significant improvement     Meets Standards     Fully Exceeds Expectations
	3 INITIATIVE: Generates ideas and initiates action to seek information to solve problems or follow through with tasks. Is a self starter.
	O Needs significant improvement
	O Needs Improvement

#### **Diagram 5 : Employee Appraisal Screen**

## CLICK ON SUBMIT AND THEN ENTER IN TODAY'S TODAY.

Assigned To Me My	Staff Reassigned By Status Completed Ri	ating Distribution			1999 - N. S.
🕄 Create App	Active Ready For Review Pendi				
arch by Name			🖉 Start Appraisal	🛃 Submit 🔒	Consolidated Appraisal
Moller, Kimberty D. Organizational Develop: Submit Appraisal By submitting this appraisal, the appraisal can be submitted to the up Meeting Date		to the upline manager for approval. Click Submit to confirm.	rian R.	CK HERE	100 %
			Status	Next Step	Estimated % Complete
	Cancel	Submit			

Diagram 6 : Submit Appraisal Process







SCAN CODE FOR MORE INFORMATION AND TO WATCH AN INSTRUCTIONAL VIDEO \*

#### CLICK ON "READY TO REVIEW" AND THEN CLICK ON "SUBMIT TO UPLINE MANAGER" BUTTON.

■ Review Performance							A C
All Assigned To Me My Staff Reast	signed By Status Completed	Rating Distribution					
Create Appraisal	Active Ready For Review	Pending Acknowledgment	Completed				
Q. Search by Name			20	pdate Meeting Da	te @ Submit To Up	line Manager 🔒 Consoli	dated Appraisal
Moller, Kimberly D. Organizational Development	Appaisal	Due Date 🌐	Status	Next Step A	ppraise Owner	Overall Rating	Meeting Date
	FY2F100 Performance Appraisal	1/6/2025	eady For Review	М	ilanowski, Darian R.	Exceeds Expectations	11/25/2024
	CLICK HERE				CLICK HERE		5 •
	Document Type Appr	aisal Owner Appraisal Owne	er Manag	Bei	Status	Next Step	Estimated % Complete

Diagram 7 : Ready for Review Tab

## PLEASE NOTIFY YOUR MANAGER YOU HAVE SUBMITTED FOR UPLINE APPROVAL.

## THEY <u>WILL NOT</u> BE NOTIFIED VIA EMAIL.

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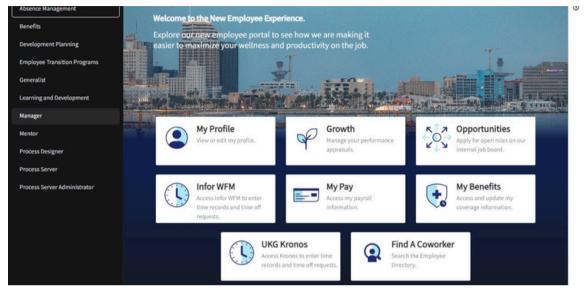
## USE THESE INSTRUCTIONS FOR UPLINE APPROVAL



## DO YOU MANAGE THE MANAGERS? WELCOME TO UPLINE APPROVALS.

## **UPLINE APPROVAL GUIDE**

## **FIRST STEP: LOGIN INTO INFOR**



**Diagram 1 : Infor Landing Page** 

## **CLICK ON "EMPLOYEE"**

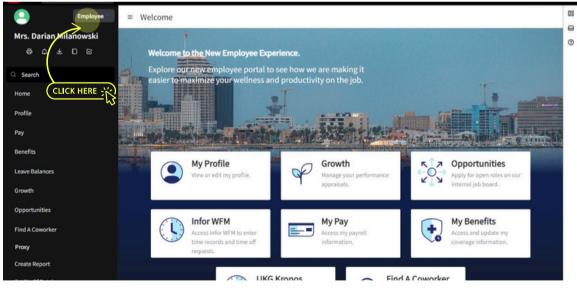


Diagram 2 : Left Hand Bar Dropdown

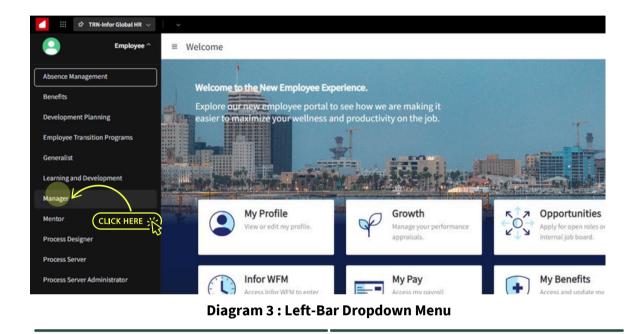
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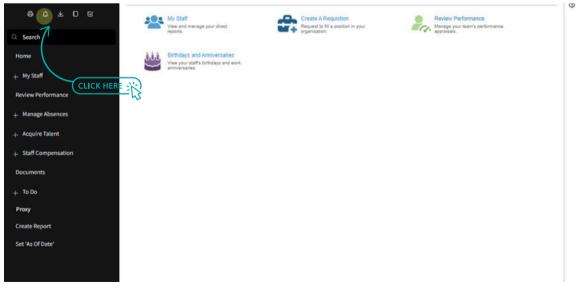
SCAN CODE TO GO TO LEARNINGCC.ORG/PERFORM



## ON YOUR DROPDOWN MENU, CLICK ON "MANAGER"

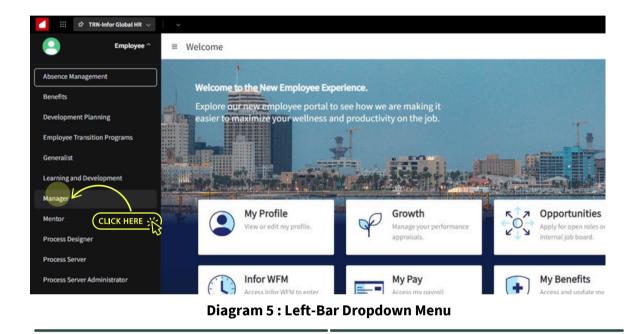


### **CLICK ON "NOTIFICATIONS"**



**Diagram 4 : Manager Space** 

## ON YOUR DROPDOWN MENU, CLICK ON "MANAGER"



### **CLICK ON "NOTIFICATIONS"**

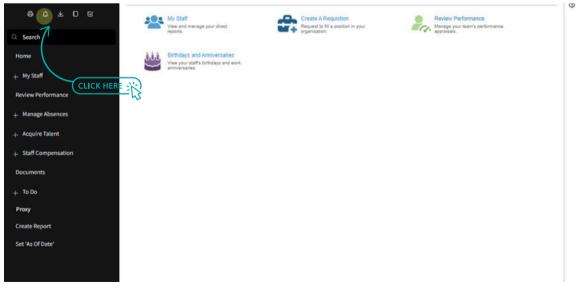


Diagram 6 : Manager Space

# IF APPROVED, YOU MAY CLICK APPROVE. IF NOT, PLEASE REJECT.



Diagram 7 : Upline Approval Screen Part 2

# THE APPRAISAL WILL GO BACK TO THE MANAGER FOR CORRECTION IF REJECTED.

## IF APPROVED, IT WILL GO BACK TO THE MANAGER SO THEY CAN HAVE THE EMPLOYEE ACKNOWLEDGE.

## ALL APPRAISALS -FINAL STEPS



# FINAL STEPS FOR BOTH NEW & CONTINUING APPRAISALS

Th.

## AFTER MEETING WITH EMPLOYEE, MANAGER WILL SUBMIT APPRAISAL TO EMPLOYEE FOR SIGNATURE

			Poř		
tributi	on				
	Meeting Date efine	G Submit 1	To Employee 🕞 Consolidated Appraisal		
Step	Manager	Appraisal	Estimated % Complete		
	Lane, Ted	Lane, Ted	100 %		

Diagram 1: Submit to Employee

## AFTER EMPLOYEE SUBMITS THEIR COMMENTS AND ACKNOWLEDGEMENT: THE MANAGER WILL RECEIVE THE EMPLOYEE'S ACKNOWLEDGEMENT AND COMMENTS IN THEIR INBOX FOR A FINAL ACKNOWLEDGEMENT AND COMMENTS.

## **APPENDIX 1**

