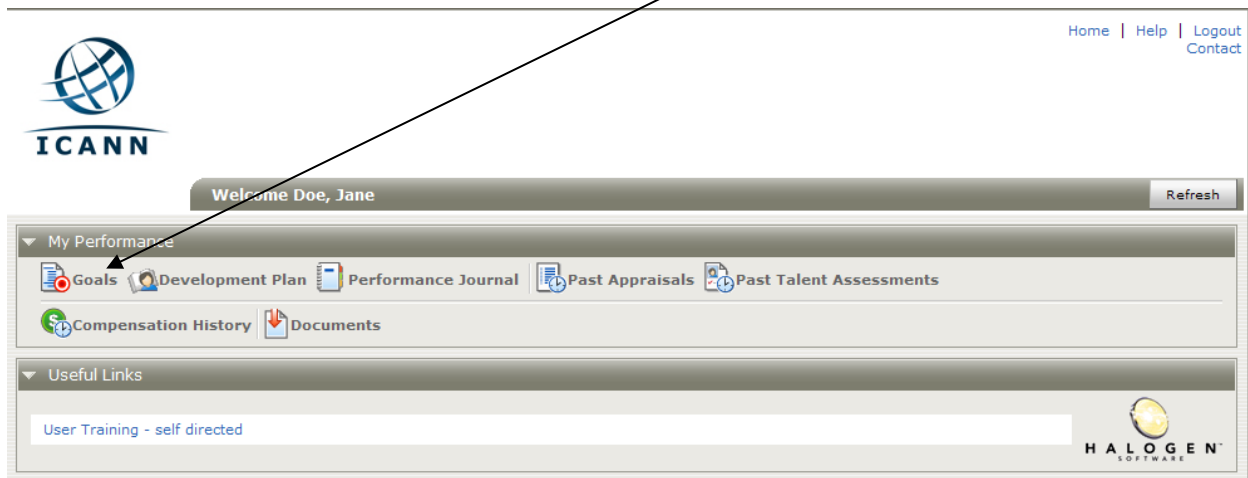


ENTERING GOALS IN HALOGEN

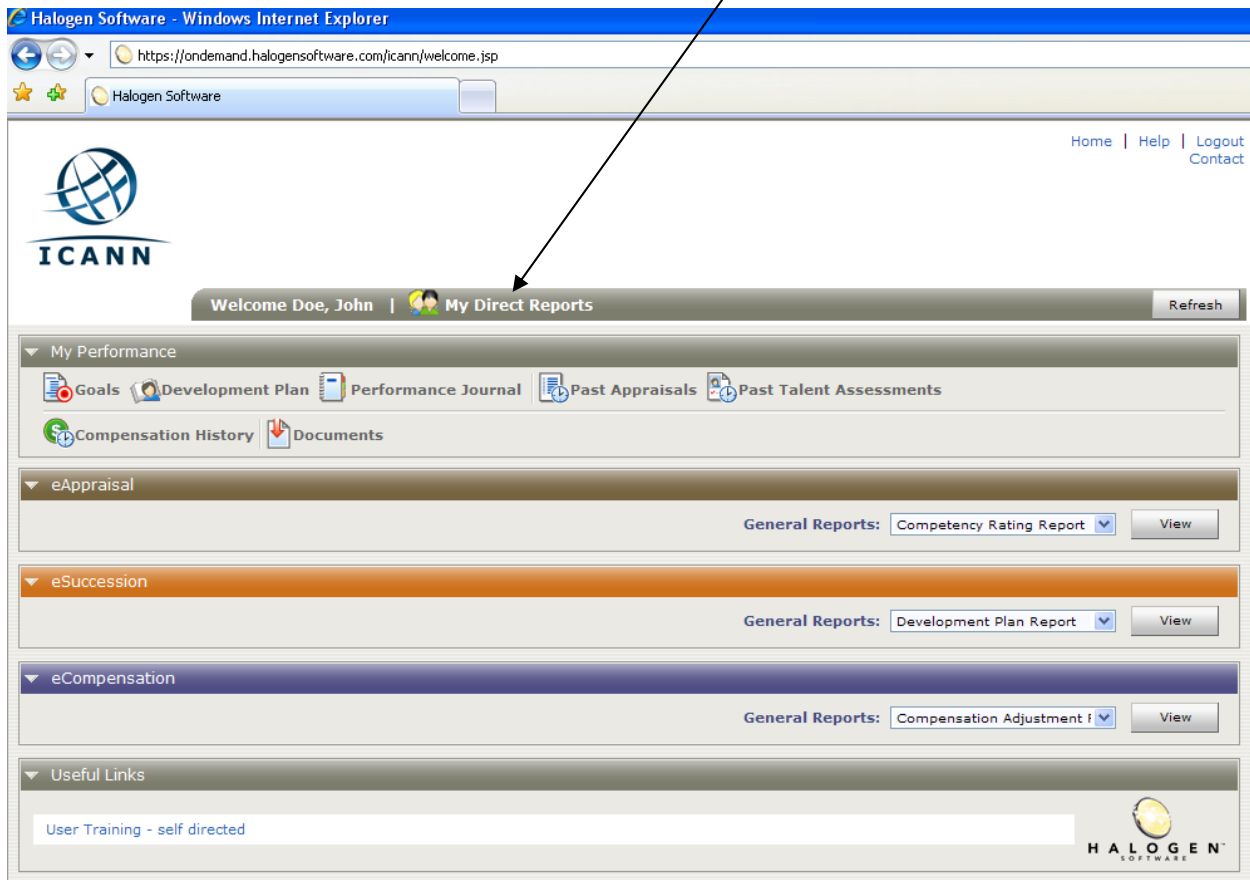
Each trimester new goals should be set by the manager and staff member and entered into Halogen. These goals then “transfer” electronically onto the scoring form at the end of the trimester.

There are a number of ways to enter goals into the Halogen system. Instructions for three different methods have been provided – any of these methods is acceptable and the decision should be made by the evaluating manager on how he or she wants the goals entered.

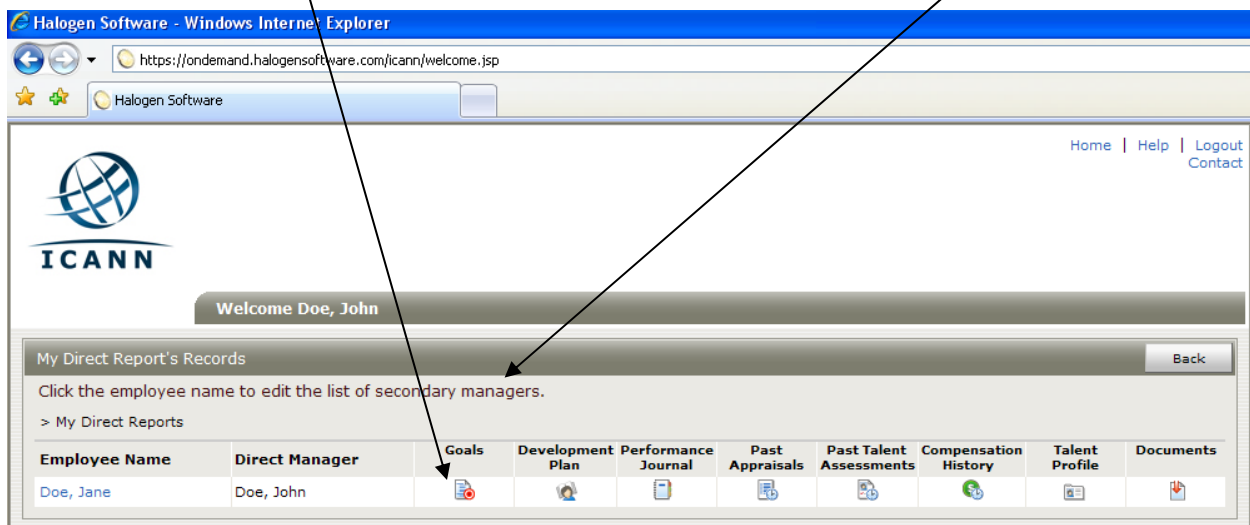
Every “user” in Halogen has a home page when they log in. At the top of the home page is a section called “My Performance”. Within that section is an icon/link called “Goals”.



The manager's home page is similar but has additional sections for eAppraisal, eSuccession, and eCompensation, and has a link at the top for "My Direct Reports".



When the manager clicks on "My Direct Reports", the following screen appears showing all direct reports and an icon for "goals" (NOTE: see below for an explanation of "secondary manager"):



SECONDARY MANAGER

In certain circumstances a manager may “share” some of the supervisory responsibilities with another manager. That “secondary” manager can be authorized to access (read and write privileges) goals, development plan, performance journal, past appraisals, past talent assessments, compensation history, talent profile, and/or documents. The secondary manager would NOT be able to complete a review on the selected staff member.

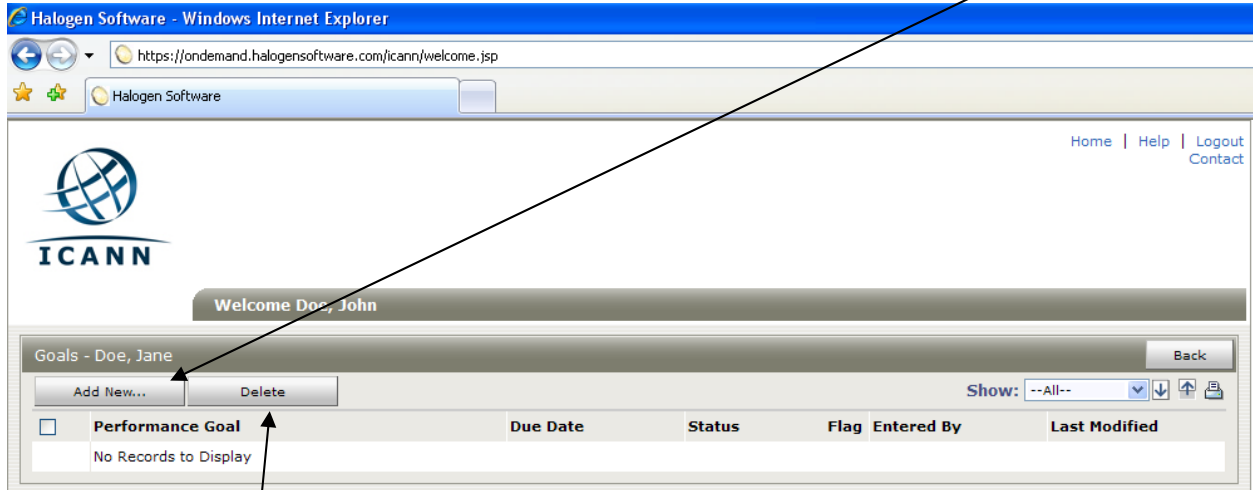
For purposes of these instructions, the “secondary manager” would follow the identical steps in METHOD ONE below if he or she has been designated a secondary manager and has agreed with the manager to be responsible for entering goals into Halogen.

If you wish to assign a secondary manager for any of your direct reports please contact Bridgett Benmosche or me for further instructions on how to set this up.

Please note that getting input on an actual evaluation (either trimester or annual) utilizes the “Ask Others to Review” utility in Halogen, not “secondary manager”. Third Party Feedback can be requested of anyone who is a participant in the Halogen process, not just other managers.

METHOD ONE – MANAGER ENTERS GOALS

Step 1 - from the “My Direct Report’s Records (see previous screen shot), the manager clicks on the goals icon for each direct report. The following screen appears and the manager clicks on “Add New”:



NOTE: if prior goals are already listed, they may be deleted by clicking in the box next to the goal and then clicking “Delete”. Prior goals that have been scored are permanently retained on the prior appraisal forms.

Step 2 - after clicking on “Add New” the following screen appears – enter the title of the goal, a description of the goal, the weight of the goal, and due date of the goal, then click “OK”:

The screenshot shows a 'Performance Goal' dialog box with the following fields and sections:

- Title:** An empty text input field.
- Subject:** A text field containing 'Jane, Doe'.
- Details:** A large text area for description.
- Category:** An empty text input field.
- Weight:** An empty text input field.
- Allow Editing:** An unchecked checkbox.
- Linked Goals:** A section header.
- Linked To:** A field containing 'none' with a trash icon.
- Dates:** A section header.
- Start Date:** An empty date input field with a calendar icon.
- Due Date:** An empty date input field with a calendar icon.
- Completed Date:** An empty date input field with a calendar icon.
- Last Modified:** A text field containing '2008/08/12'.
- Status:** A section header.
- Status:** A dropdown menu showing '--none selected--'.
- Percent Complete:** A dropdown menu showing '0%'.
- Visual Indicators:** A row of icons: a green circle, an orange triangle, a red square, and 'N/S', each with a corresponding empty circle below it.
- Buttons:** 'OK' and 'Close' buttons at the bottom right.

Arrows from the text above point to the Title, Subject, Details, Weight, Allow Editing, Due Date, and OK buttons.

Repeat this step until all goals are entered. If you wish to allow the staff member to edit the goals, you must check the “Allow Editing” box as well.

Here is an example of the goal page completed prior to clicking "OK":

Performance Goal ✖

Title:

Subject: **Jane, Doe**


Details:

Category:


Weight:


Allow Editing:


Linked Goals

Linked To:  none

Dates




Start Date: 





Due Date: 

Completed Date: 

Last Modified: 2008/08/12

Status

Status:    N/S

Percent Complete:    

Step 3 – after you click “OK”, the screen will look like this:

The screenshot shows a web browser window titled "Halogen Software - Windows Internet Explorer" with the URL "https://ondemand.halogensoftware.com/icann/welcome.jsp". The page features the ICANN logo and a navigation menu with "Home", "Help", "Logout", and "Contact". A welcome message reads "Welcome Doe, John". Below this is a section titled "Goals - Doe, Jane" with a "Back" button. There are "Add New..." and "Delete" buttons, and a "Show: --All--" dropdown menu. A table lists performance goals:

<input type="checkbox"/>	Performance Goal	Due Date	Status	Flag	Entered By	Last Modified
<input type="checkbox"/>	Produce final documentation for XYZ process	2008/11/09		N/S	Doe, John	2008/08/12

An arrow points to the checkbox in the first row of the table.

Note the box – this allows this goal to be deleted. Since the manager entered the goal, only the manager can delete the goal. If the staff member (Jane Doe) logs in and looks at this goal, this is what she would see:

The screenshot shows the same web browser window, but the user is now Jane Doe. The welcome message reads "Welcome Doe, Jane". The "Goals" section is titled "Goals" and has a "Back" button. There are "Add New..." and "Delete" buttons, and a "Show: --All--" dropdown menu. The table is identical to the previous screenshot:

<input type="checkbox"/>	Performance Goal	Due Date	Status	Flag	Entered By	Last Modified
<input type="checkbox"/>	Produce final documentation for XYZ process	2008/11/09		N/S	Doe, John	2008/08/12

Two arrows point to the checkbox and the goal link in the first row of the table.

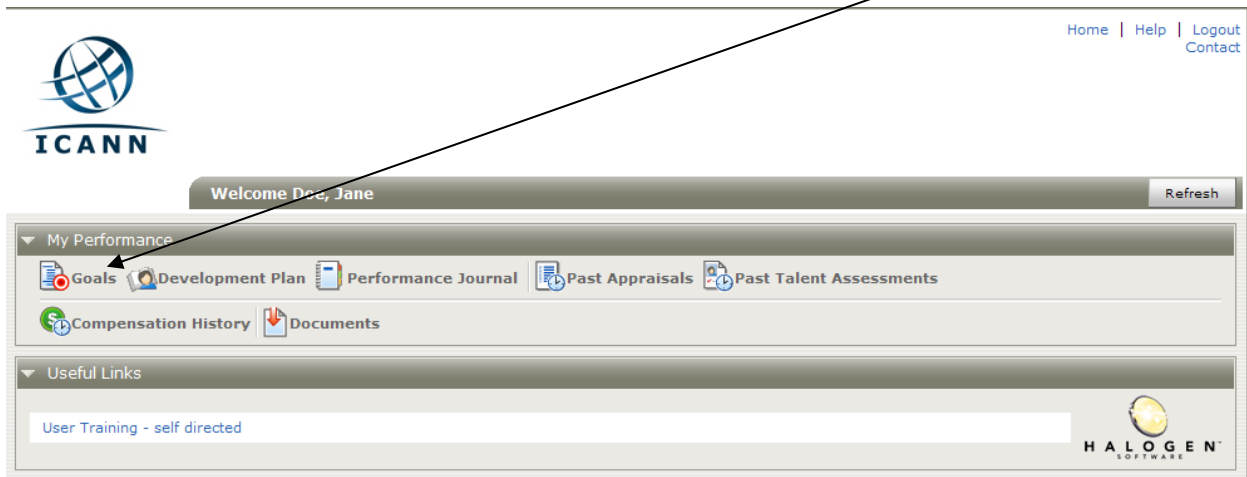
Note that there is no box – Jane cannot delete this goal. If Jane clicks on the link for the goal, she can edit the goal (since the manager checked the “Allow Editing” box), but she cannot delete it.

A variation of this method has the manager simply following the above steps but having the staff member actually enter the content of each goal. To do this, the manager follows the above steps, but for the title of each goal would merely enter “T1 Goal 1” and “Allow Editing” and click “OK”, then add another goal and name it “T1 Goal 2”, etc. The minimum number of goals for each staff member should be three and the maximum should be eight. The staff member, through “editing” would enter the goal information but the manager would retain “control” (or delete rights).

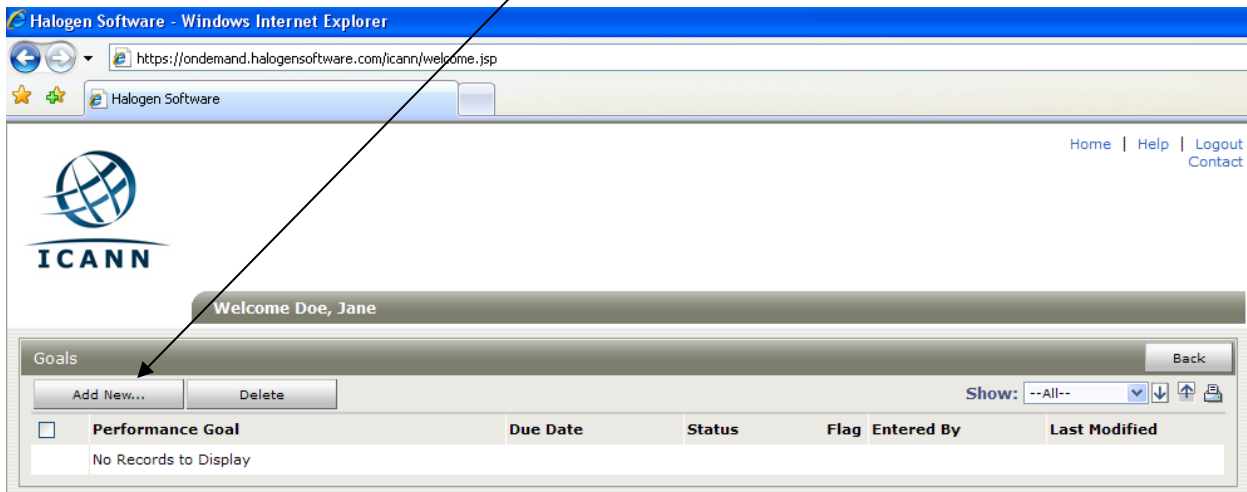
METHOD TWO – STAFF MEMBER ENTERS GOALS

If the manager so decides, the staff member can have “control” over the goal (that is, the right to delete the goal). If the manager agrees, the staff member would follow these steps to enter his or her goals:

Step 1 – from the home page in the “My Performance” section click on the goals icon:



Step 2 – on the next screen click on “Add New”:



Step 3 – in the screen that appears, enter the title, description, weight and due date for the goal.

The screenshot shows a 'Performance Goal' dialog box with the following fields and sections:

- Title:** An empty text input field.
- Subject:** A text input field containing 'Jane, Doe'.
- Details:** A large text area for description.
- Category:** An empty dropdown menu.
- Weight:** An empty text input field.
- Linked Goals:** A section with 'Linked To:' set to 'none'.
- Dates:** A section with 'Start Date:', 'Due Date:', and 'Completed Date:' each having a date picker icon.
- Status:** A section with 'Status:' set to '--none selected--' and 'Percent Complete:' set to '0%'. It also includes status icons: a green circle, an orange triangle, a red square, and 'N/S'.

Four arrows point to the Title, Subject, Weight, and Due Date fields, indicating where to enter information.

Note that there is NO “Allow Editing” box – by default, all goals entered by the staff member can be edited by his/her manager.

Continue with steps two and three until all goals are entered.

METHOD THREE – HR ENTERS GOALS

If the manager is unable to enter the goals and does NOT want the staff member to have “control” (delete capability), the goals can be entered by HR. The manager would need to forward detailed goals, preferably in a Word document, to HR that has the title, description, weight and due date for each goal and indicate whether or not the staff member should have “edit” rights. The manager would still retain “delete” rights to the goals.