Table of contents

Introduction ........................................................................................................................................... 1

Team Performance Workplans ............................................................................................................... 3
  Log into ESS ....................................................................................................................................... 4
  Accessing Team Performance Workplans .......................................................................................... 4
  Change employee list .......................................................................................................................... 7
  Performance workplan status .............................................................................................................. 8
  Export a report to Excel ...................................................................................................................... 8
  Workplan Status tabs ........................................................................................................................... 9
About this guide

This guide has been designed using adult learning concepts to support a variety of learning styles. It contains:

- Exemplars
- Skill Builders
- Walkthroughs.

Prompts used in this guide

The following prompts are used throughout the workbook:

- Skill builder
- Helpful tips
- Notes
- Steps
Introduction

The aim of this guide is to provide managers with the skills and knowledge to effectively staff workplans and status reports.

Target audience

All RMIT Managers

Guide structure

Information in this guide will help managers undertake activities throughout RMIT’s performance cycle.

Other resources that support managers are:

- MyPerformance MyCareer website
  - www.rmit.edu.au/staff/myperformancemycareer
- Skill builders
  - www.rmit.edu.au/staff/myperformancemycareer/skillbuilders
- MyPerformance at RMIT guide
  - www.rmit.edu.au/staff/myperformancemycareer/guides
- Performance Workplan e-learning modules
  - www.rmit.edu.au/staff/myperformancemycareer/simulations
- DevelopME
  - www.rmit.edu.au/staff/professionaldevelopment
- Performance workplan drop in labs
Team Performance Workplans

Purpose
Access employee workplans to review, appraise and determine status.

Section outline
- Access Team Performance Workplans
- Export reports to Excel.
Log into ESS

Staff > ESS

1 From the RMIT Home Page click STAFF WEBSITE in the Staff section
2 Click the Employee Self Service (ESS) button
3 Click Log into ESS
4 Complete the Staff Self Service logon screen:
   - User ID: Type your employee number
   - Password: Type your password
5 Click the Logon button to display the ESS Home page

Note: All RMIT employees are provided with a user ID and password on the commencement of their employment.

Initially, your password will use the letter p and your date of birth backwards, using YYYMMDD format, followed by !. E.g. 25 January 1976 would display as p9760125!.

New staff should change the temporary password when prompted to do so. ESS passwords are case sensitive.

For a comprehensive listing of compatible browsers when using ESS refer to www.rmit.edu.au/staff/ess

Accessing Team Performance Workplans

Performance Workplans for your team can be accessed by alternative paths, either from the Employee Self Service tab, the Line manager tab (for Line Managers) or the Appraising Manager tab (for managers with appraisal access only):

Employee Self Service > MyPerformance MyCareer > Team Performance Workplans
or
Line manager > MyPerformance MyCareer > Team Performance Workplans
or
Appraising Manager > MyPerformance MyCareer > Team Performance Workplans

The Home Overview screen displays tasks requiring attention.

1 From the Home Overview screen, click the Employee Self Service tab
2 Click the **MyPerformance MyCareer** hyperlink

The **MyPerformance MyCareer Overview** screen displays

3 Click the **Team Performance Workplans** hyperlink

The **Employee Documents** screen displays

<table>
<thead>
<tr>
<th>Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Status</strong></td>
<td>Indicates the current phase in the performance cycle. This changes as you move through the cycle.</td>
</tr>
<tr>
<td><strong>Substatus</strong></td>
<td>Indicates whether the staff member or the manager has edit access to the Performance Workplan. This changes as you move through each step of the phase.</td>
</tr>
<tr>
<td><strong>Staff Member Name</strong></td>
<td>The staff member who owns the Performance Workplan.</td>
</tr>
</tbody>
</table>
Appraiser Name | The staff member responsible for conducting the appraisal. This is usually the line manager.
--- | ---
Performance Workplan | Performance Workplans are generated annually. Click the hyperlink to view and/or edit the Performance Workplan.

4 Click the **Show Quick Criteria Maintenance** button to display date range criteria to view 2013 workplans

5 Click the **Date** icons and change the date range to be from **01.01.2012** to **31.12.2099** as shown

6 Click the **Apply** button

7 Click the blue **Refresh** link in the bottom right of screen (as indicated in Figure 3 above) to display workplans for the date range selected

8 Click the **Performance Workplan** hyperlink, to view, review or appraise the required Performance Workplan, e.g. *Professional Performance Workplan (Year – 2013)*

The **Performance Workplan** screen displays
Caution: It is important to change the date query filter range as in step 5 above, to ensure the required workplan year is included. This will only need to be done the first time you access workplans for the new year.

Change employee list
By default, the team performance workplans are displayed for those employees who you are responsible for appraising (Employees to Appraise). You can change this to display both those employees and also the staff members who they appraise.

1. From the Employee Documents Overview screen (see Figure 3) click the drop-down arrow for the Employee field in the Quick Criteria Maintenance section.

2. Click Manager’s Manager then click Apply

The Employee Documents list refreshes to display workplans for these staff
Performance workplan status

The *Employee Documents Overview* screen displays the status and substatus of each employee’s performance workplan. You can export a report to Excel to assist with managing this list. Alternatively you can use the *Status* tabs on the *Employee Documents Overview* screen to narrow the list to focus on employees with a specific status.

**Export a report to Excel**

1. From the *Employee Documents Overview* screen click the *Export* button then click **Export to Microsoft Excel**

   ![Employee Documents Overview screen - Export button.](image)

   *Figure 7. Employee Documents Overview screen - Export button.*

2. Click the **Save** button to display the *Save As* dialog box
3. Navigate to the location where you wish to save the file, change the name if required then click the **Save** button.

**Tip:** You can export a report of those you appraise by leaving the Employee criteria as **Employees to Appraise**. Change to Manager's Manager (see page 7) to export a report of those you appraise as well as employees that they appraise.

**Workplan Status tabs**

The **Status** tabs on the Employee Documents Overview screen display all Team Performance Workplans with that status.
**Caution:** When you click on a specific Status tab for the first time, click the **Show Quick Criteria Maintenance** button and change the end date to include Performance Workplans for the required year.

1. To see Performance Workplans that have an End of Year Review status, for example, click the **End of Year Review** tab.

![Employee Documents Overview screen - End of Year Review tab.](image1)

**Figure 11. Employee Documents Overview screen - End of Year Review tab.**

2. Click the **Show Quick Criteria Maintenance** button to display the **Quick Criteria Maintenance** section.

![Quick Criteria Maintenance](image2)

**Figure 12. Quick Criteria Maintenance.**

3. Change the end date to **31.12.2099** as shown in Figure 4.

4. Click **Apply**

The **Employee Documents** list refreshes to display Workplans with this status.

![Employee Documents Overview - End of Year Review tab.](image3)

**Figure 13. Employee Documents Overview - End of Year Review tab.**

**Note:** The tab indicates the number of Workplans with this status.

This number will only be accurate for all tabs once the Quick Criteria has been updated for each tab to include the current year.