

HR Global Performance System (GPS)
Application Development Plan

Introduction

The Application Development Plan (ADP) describes in detail the structure and functionality of phase II updates to GPS, a Web-based system for managing employee performance documents. GPS phase I focused on KTOs. GPS phase II will focus on the Mid-Year Review.

The purpose of this ADP is to specify the complete phase II site functionality from the end-user's perspective. The document will attempt to specify this functionality to a degree of detail that will ensure understanding by everyone involved with the project.

Scope of Document

This ADP describes the output of the entire development effort for this project. Anything not explicitly or implicitly included in this document is considered out of scope. Any changes to scope after business and technical signoff on this document will need to go through the change request process. The ADP will be updated to reflect any significant changes; minor changes may not be reflected.

Change History

Date	Author	Description
	Leah Buley & Jeffrey Coleman	First Draft

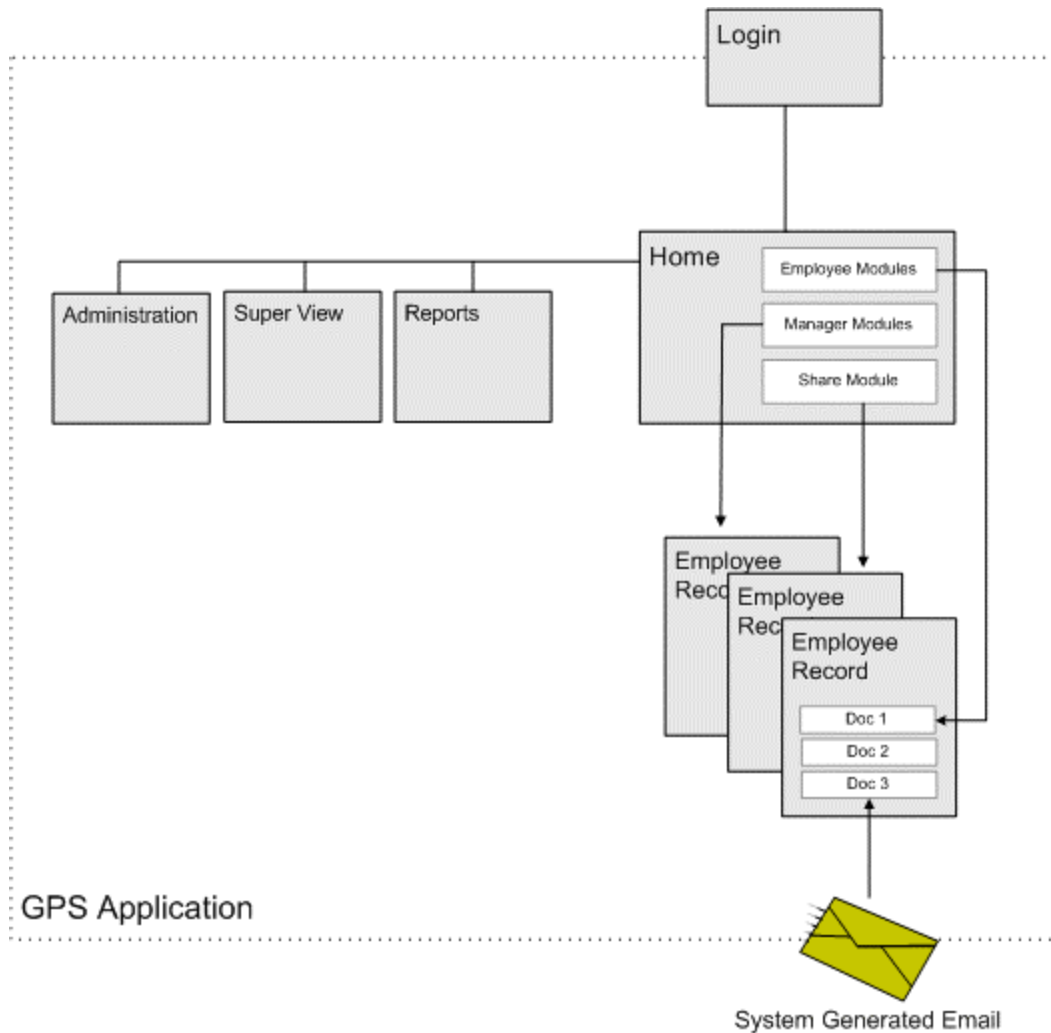
Overview

GPS is designed around the concept of employee performance “documents” organized into “employee records.” Each employee record contains one or more performance documents. At a minimum, this will eventually include KTOs, the Mid-Year Review, and the End-Year Review. It may also include other documents yet to be determined.

Each employee has primary ownership and control over his or her documents, but an employee’s direct manager also contributes by approving what the employee has written and in some cases adding comments. Line managers and designated “super viewers” may access a given employee’s documents in order to view them, but only the employee and the manager can change the text or status of a document.

Site Structure

Users enter GPS through the home page or a system-generated email and launch one or more employee records. The small group of users with the necessary permissions may also navigate through the home page to the administration, super view, and reporting pages.



Document Types

GPS currently includes two types of performance documents: KTOs and Mid-Year Reviews.

KTOs

KTO document functionality was implemented in phase I of the GPS build, and is beyond the scope of this document.

Mid-Year Reviews

The Mid-Year Review contains a mid-year update on the progress of KTOs and a section on the employee's personal development.

Page Flow

This document is structured like a wizard, with prominent buttons and progress indicators guiding users through each of the pages.

First the employee writes his or her comments on these areas, then the manager adds comments, and finally the employee reviews and acknowledges the manager's comments, indicating that the review is complete.

The following diagram illustrates the sequence of pages employees and managers will follow in filling out the mid-year review.

[insert mid-year flow diagram here]

Roles & Statuses

The following list describes everyone who is allowed to access a given Mid-Year Review. Users who do not fit into one of these roles in relation to a document should be prohibited from accessing it.

- *Employee* – the owner of the document. Drafts employee comments, submits the review, and completes the review by acknowledging manager comments.
- *Manager* – the direct manager of the owner of the document. Drafts manager comments, and approves employee comments.
- *Line Manager* – an indirect manager of the owner of the document. May view review once it has been acknowledged by employee.
- *Super Viewer* – a user with rights to view other people's documents (assigned by an administrator). May view review once it has been acknowledged by employee.

A Mid-Year Review goes through the following statuses to become complete:

- *Not started* – nothing has been done
- *Drafted by employee* – the employee has started the review and most likely added comments. No part of the mid-year review is required, however, so the review is considered “drafted by

employee” as soon as he or she has visited any editable page in the review, whether or not he or she has added comments.

- *Submitted* – the employee has submitted the review to his or her manager.
- *Drafted by manager* – the manager has viewed an editable page and may or may not have added comments. As for the employee, no part of the mid-year review is required, so as soon as the manager has visited any editable page, the review is considered “drafted by manager.” At this point if the manager is dissatisfied with what the employee has written he or she can roll the document back to *Drafted by employee* status and ask the employee to make changes.
- *Approved* – the manager has approved the employee’s comments and sent the review back to the employee along with any manager comments for acknowledgment. At this point if the manager is dissatisfied with what the employee has written he or she can roll the document back to *Drafted by employee* status and ask the employee to make changes.
- *Acknowledged* – the employee has reviewed and acknowledged the manager’s comments. The review is complete. At this point if the employee is dissatisfied with what the manager has written he or she can roll the document back to *Drafted by manager* status and ask the manager to make changes.

Users have varying access rights depending on the status of the document at the time.

	Employee	Manager	Line Manager	Super Viewer
<i>Not Started</i>	N/A	N/A	N/A	N/A
<i>Drafted by Employee</i>	View employee comments	Suppress all comments	Suppress all comments	Suppress all comments
<i>Submitted</i>	View employee comments	View employee comments / manager comments N/A	Suppress all comments	Suppress all comments
<i>Drafted by Manager</i>	View employee comments / suppress manager comments	View all comments	Suppress all comments	Suppress all comments
<i>Approved</i>	View all comments	View all comments	Suppress all comments	Suppress all comments
<i>Acknowledged</i>	View all comments	View all comments	View all comments	View all comments

Page-Level Specifications

Home Page

Home Page

All users of GPS are redirected to the home page after logging in.

The home page displays several modules that serve as pathways to employee performance material. All users see a standard module that allows them to view their own documents. Users with management responsibilities, shared documents, super view rights, administrative rights, or reporting rights see additional modules or links.

Employee module
Visible to all users

Manager's "list" module
Visible only to users who are managers

Administrative links
Visible only to users with the necessary permissions assigned to their user profile

Welcome message
Visible to all users

Manager's "finder" module
Visible only to users who are managers

Share module
Visible to any user who has been given shared viewing privileges on another user's document

The screenshot shows the GPS Home page with the following sections highlighted by red circles:

- Administrative links:** A navigation bar at the top right containing links for Home, My Documents, My Reports, My Shared Documents, My Performance, My Settings, and My Profile.
- Welcome message:** A message from Mike Kelley stating: "You have drafted your mid-year review, and it is ready to be submitted by your manager. If you need additional information on how to draft your KTDs, please click on the FAQ link."
- Employee module:** A section titled "your documents" with a list of tasks: 1. Draft Overview, 2. Update KTDs, 3. Provide Comments, 4. Access Documents, 5. Write Development Plan, 6. Submit Review, and a link for Knowledge Manager Feedback.
- Manager's "list" module:** A section titled "your reports documents" containing a table of reports.
- Manager's "finder" module:** A "find reports" section with a search box and a list of names including Scott Armstrong, Araceli Acosta, Brian Booth, Gabriel Bortis, Bob Bortis, Leah Bailey, Michael Burns, Steve Cardillo, Jeffery Coleman, Andrew Cook, Emma Gowden, Cary Durrin, Paul Eklapp, Kenneth Flagg, and Chris Fracklin.
- Share module:** A section titled "shared documents" containing a table of shared documents.

Employee Name	Job Description	2005 Mid-year Review Status
Robin Smith	Global IT Product Manager	Not Started
Yin Sheng	Global IT Product Manager	Submitted
Paul Swartz	Regional Manager	Approved
Simon Williams	Project Manager	Approved

Employee Name	Job Description	2005 KTD
Paul Stevens	Global Head of Technology	2005 KTD
Dan Hagelin	Global IT Product Head	2005 KTD
Stake Grossman	Global Co-CEO	2005 KTD

Home Page (0.1)

The screenshot shows the 'GPS | Home' interface. At the top left is the 'bip' logo and the text 'human resources global performance system'. On the top right, there are navigation links: 'bip Home | IQ | Directory | Sites | Search & Archives' and 'GPS Home | Administration | Super View | Reports | FAQ | Log Off'. The main content area is divided into several sections:

- your documents:** A list of 7 steps for a mid-year review: 1. Read Overview, 2. Update KTOs, 3. Provide Comments, 4. Assess Strengths, 5. Write Development Plan, 6. Submit Review, 7. Acknowledge Manager Feedback. A note indicates that step 6 is completed and the manager gives feedback.
- your reports' documents:** A table showing employee names, job descriptions, and their 2005 mid-year review status. Below the table is a summary bar for 'all reports' showing counts for Not Started (1), Drafted (7), Submitted (5), Approved (10), and Acknowledged (2).
- shared documents:** A list of three documents: Paul Stevens (Global Head of Technology) 2005 KTO, Dan Hagelin (Global IT Product Head) 2005 KTO, and Blake Grossman (Global Co-CEO) 2005 KTO.
- find reports:** A search interface with filters for 'By KTO Status', 'By Mid-year Review Status', and 'By Name'. It includes a search button, a 'See All' button, and a list of employee names with checkboxes. An 'Email checked names' button is at the bottom.
- Hello, Mike Kelley:** A personalized message stating that the user has drafted a mid-year review and it is ready to be submitted to their manager. It includes a link to an FAQ for more information.

Employee Module

Manager Module

Finder Module

Employee Record Pages

Each employee record opens into a separate window, making it possible to compare employee records onscreen.

Employee records are accessible through the GPS home page, system-generated emails, or links in other employee records.

Standard Elements

All employee record pages follow a standard template. General information identifying the employee and tabs for navigating between documents appear at the top of each page. Individual page contents take up the rest of the page.

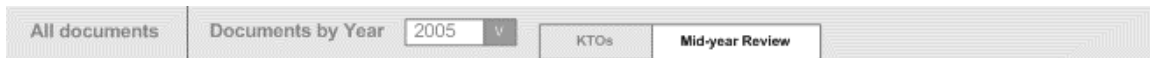
Employee Header Bar



The following employee information appears at the top of all employee record pages in the standard header bar:

- Employee name;
- Employee title;
- The employee's direct manager and any direct reports. If the user is allowed to access any of the manager's or direct reports' documents, their names will be hyperlinked. The link opens the appropriate employee record to the *all documents* page; **Confirm with Jeff that this is OK**
- A link to detailed instructions relevant to the current page. Clicking the link toggles a panel in the page with detailed instructions. The link text changes from "show instructions" to "hide instructions."

Document Navigation Bar



The document navigation bar appears directly beneath the employee header bar on all employee record pages. It provides a means of navigating among all documents available for an employee. It shows:

- A tab leading to the *All Documents* page (1.1);
- A dropdown listing all the years within which documents are available for that user;
- A tab for each document available in the selected year. The KTO tab links to the KTO View page (2.1). The Mid-Year tab links to the Mid-Year Overview page (3.1).
- Changing the year in the dropdown refreshes the page and the available document tabs.
- Documents tabs are shown under three circumstances:
- A document is current (as indicated in the table of active document types). This means that this is the main document in play in the system at the time. A tab should appear for the current document whether or not it has been started by that user (i.e., whether a document has been saved in the database);

- A document is active (as indicated in the table of active document types). This means that the document should be accessible and editable, though it is not the current document.¹ A tab should appear for the active document whether or not it has been started by that user;
- An older document that is no longer active or current but its status is anything greater than not started (i.e., it's been saved in the database). Note that the contents of the actual document pages may be somewhat restricted, if the document was never completed. **Does the team agree?**

If for whatever reason there is a gap in the years of available documents (because an employee left and then returned to the company, for example), the dropdown should list only years for which documents exist, skipping any years with no documents.

All users with permission to access an employee record will see the navigation bar and have full ability to toggle years. However any documents the user does not have permission to view will not be hyperlinked and will have a visual appearance that reflects their disabled state.

Mid-Year Printable Version Link

All Mid-Year Review pages will contain a link to the Mid-Year printable version page (3.13). This link opens in a new window. If the page the user is coming from contains editable information, clicking this link should first submit the page form handler, so the printable version displays the latest content.



Mid-Year Tabs

Mid-Year Review pages include a separate set of tabs that also function as a progress indicator. These tabs appear beneath the document navigation bar. This only shows the steps that are relevant to the given user at that point in the process. This breaks down as follows:

Not Started

Employee



Manager



All Others with Access



¹ An example of this would be when most of the firm is still working on the End-Year Review (because it's December and the year's not over, darn it!), but some groups are ready to soldier on with their KTOs. In that case, the End-Year Review would be the current document but the KTOs for the following year would be an active document.

*Drafted by
Employee*

Employee



Manager



All Others with Access



Submitted

Employee



Manager



All Others with Access



*Drafted by
Manager*

Employee



Manager

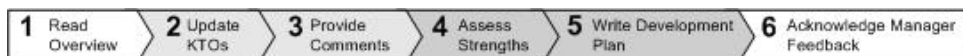


All Others with Access



Approved

Employee



Manager



All Others with Access



Acknowledged **Employee**



Manager



All Others with Access



The tabs are always active. Clicking on a tab redirects to the selected page, though the contents of the page may be somewhat restricted depending on the status of the document. (See the section on roles & statuses under the Document Types section of this ADP for a detailed breakdown of who sees what and when.)

The tabs link to pages as follows²:

- *Overview* – links to Mid-Year Overview page (3.1)
- *KTO Update* – links to Mid-Year KTO Update page (3.2)
- *General Comments* – links to Mid-Year General Comments page (3.3)
- *Strengths Assessment* – links to Mid-Year Strengths Assessment page (3.4)
- *Development Plan* – links to Mid-Year Development Plan page (3.6)
- *Submit Review* – links to Mid-Year Submit page (3.8)
- *Approve Review* – links to Mid-Year Approve page (3.9)
- *Acknowledge Review* – links to Mid-Year Acknowledge page (3.11)

² Tab labels may change.

Technical Note

Some version of the steps bar is common to all mid-year review pages, so it can be built as an include or a single tile.

Open issues

If the employee click one of the mid-year review tabs from the overview page does the doc status automatically switch to drafted or do they only really start drafting once they explicitly click the start button?

eWebEditPro Controls

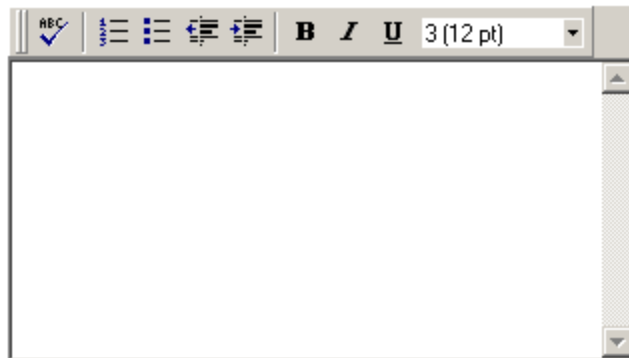
GPS uses a third-party rich text editor called eWebEditPro that makes it possible for users to enter text with formatting such as bold, italics, and bullets. Most textarea boxes on this site are actually HTML <div> elements. When clicked, they load the rich text editor, allowing users to enter comments with special formatting. Clicking off of the element causes it to return to its default visual appearance (like a textarea), with any updates to the text reflected in the element onscreen. Those elements will be referred to as *eWebEditPro controls* in this document.

New
KTO



BEFORE
clicking on the
control

New
KTO



AFTER
clicking on the
control

All Documents (1.1)

The screenshot shows a web browser window titled "GPS | Kelley, Mike". The page header includes "Employee Performance Record", "Mike Kelley", and "Global IT Product Head". A "Manager & Reports V" button and a "Show Instructions >" link are also visible. Below the header is a navigation bar with "All documents" selected, a "Documents by Year" dropdown menu set to "select", and buttons for "KTOs" and "Mid-year Review". The main content area lists performance documents for the years 2005, 2006, and 2007. For 2005, links are provided for "KTOs", "Mid-year Review", "End-year Review", "Upward Feedback", and "Peer Feedback". For 2006 and 2007, links are provided for "KTOs", "Mid-year Review", and "End-year Review".

Overview

This page lists and links to all performance documents for a given employee.

Functionality

Since this page is accessible through the document navigation bar that appears in all employee record pages, it may be accessed by anyone with any rights to view any of the user's performance documents.

It displays a list of performance documents grouped by year.

Documents are listed under three circumstances:

- A document is current (as indicated in the table of active document types). This means that this is the main document in play in the system at the time. The current document should be listed whether or not it has been started by that user (i.e., whether a document has been saved in the database);
- A document is active (as indicated in the table of active document types). This means that the document should be accessible and editable, though it is not the current document. Active documents should appear whether or not they have been started by that user;
- An older document that is no longer active or current but its status is anything greater than not started (i.e., it has been saved in the database).

All documents that the user has permission to see will be hyperlinked. Documents that the user may not access will simply be displayed as text. **CB to verify**

Clicking a hyperlinked document name will load the default page for the selected document. Default pages are:

- *KTO Document* – KTO view page (2.1)
- *Mid-Year Document* – Mid-Year overview page (3.1)

Mid-Year Overview (3.1)

Overview

This is the default page for the mid year review and the starting point for all mid-year review activity.

Employee Draft & Acknowledge (3.1 ED & 3.1 EA)

GPS | Kelley, Mike

Employee Performance Record
Mike Kelley
Global IT Product Head

Manager & Reports V [Show Instructions >](#)

All documents Documents by Year KTOs Mid-year Review

Printable Version

Complete your review by working through the steps below.

- 1 Read Overview
- 2 Update KTOs
- 3 Provide Comments
- 4 Assess Strengths
- 5 Write Development Plan
- 6 Submit Review
- 7 Acknowledge Manager Feedback

Welcome to your mid-year review. Maecenas tincidunt aliquam dui. Integer malesuada iaculis velit. Cras est libero, tincidunt nec, viverra ac, ullamcorper eu, sem. Integer placerat pede vel massa. Suspendisse sollicitudin dui vel eros. Nunc vestibulum justo eget elit. Sed ultrices semper nisl. Cras massa risus, sagittis nec, euismod pharetra, ultricies ac, eros. Nam auctor blandit urna. Ut id massa.

Aliquam imperdiet, nisl a aliquet tincidunt, ipsum quam mattis lacus, nec tempus velit tortor nec justo. Aliquam elit velit, pharetra vel, dapibus et, dictum quis, felis. Integer imperdiet vehicula orci. Cum sociis natoque penatibus et magnis dis parturient montes, nascetur ridiculus mus.

Curabitur vitae mauris. Maecenas ornare. Lorem ipsum dolor sit amet, consectetur adipiscing elit. Pellentesque malesuada. Mauris lacus. Fusce fringilla dapibus sem. Suspendisse gravida wisi id enim. Integer urna augue, lobortis nec, lobortis a, pellentesque ut, pede.

Vivamus nec quam porta nunc tincidunt euismod. Vivamus at urna sed magna venenatis pharetra. Duis vitae turpis in nunc vulputate varius. In hac habitasse platea dictumst. Pellentesque viverra libero id augue. Duis rhoncus ultricies justo. Sed libero nisl, sagittis eget, tincidunt vitae, bibendum a, risus.

Just the essentials...

- Steps 2 & 3 are an update on your progress. Steps 4 & 5 are a place for you to think about your personal development (and they're optional).
- After step 6 your manager will need to add feedback before you can move on to step 7.
- You can save at the end of each step and quit the system at any time.
- It's a good idea to [print the review](#) and think about what you'll write before you begin.
- Have a conversation with your manager if you have questions!

[QUIT FOR NOW](#) [START THE REVIEW](#)

This page displays content delivered through the content management system **and/or summary information about the document.**

When the document status is not started or drafted by employee the content will include a general introduction to the mid-year review, and a sidebar calling out the core steps employees should follow.

When the document status is submitted or drafted by manager this page should display a message that manager is working on the document and that the employee will receive an email when the document is ready for acknowledgment.

When the document status is approved this page should display text explaining that the document is ready to be acknowledged and what that means. It should also include a sidebar calling out what employees need to do in order to acknowledge their review.

When the document status is acknowledged this page should display a message that the document is complete. Should it also display data points like when it was approved, whether a meeting took place, etc.?

Manager Draft & Approve (3.1 MD & 3.1 MA)

The screenshot shows a web application window titled "GPS | Kelley, Mike". The main content area is for an "Employee Performance Record" for "Mike Kelley, Global IT Product Head". The interface includes a navigation bar with "All documents", "Documents by Year" (set to 2005), "KTOs", and "Mid-year Review". A "Printable Version" link is visible. The main heading is "Add feedback to this review by working through the steps below." Below this is a progress bar with six steps: 1. Read the Overview, 2. KTO Update, 3. General Comments, 4. Strengths Assessment, 5. Personal Development, and 6. Approve the Review. The current step is 2, "KTO Update". The main content area contains three paragraphs of placeholder text and a sidebar titled "Just the essentials..." with three bullet points. At the bottom, there are two buttons: "QUIT FOR NOW" and "START ADDING FEEDBACK".

GPS | Kelley, Mike

Employee Performance Record
Mike Kelley
Global IT Product Head

Manager & Reports V [Show Instructions >](#)

All documents Documents by Year 2005 KTOs Mid-year Review

Add feedback to this review by working through the steps below. [Printable Version](#)

1 Read the Overview 2 KTO Update 3 General Comments 4 Strengths Assessment 5 Personal Development 6 Approve the Review

Your feedback is essential. Maecenas tincidunt aliquam dui. Integer malesuada iaculis velit. Cras est libero, tincidunt nec, viverra ac, ullamcorper eu, sem. Integer placerat pede vel massa. Suspendisse sollicitudin dui vel eros. Nunc vestibulum justo eget elit. Sed ultrices semper nisl. Cras massa risus, sagittis nec, euismod pharetra, ultricies ac, eros. Nam auctor blandit uma. Ut id massa.

Aliquam imperdiet, nisl a aliquet tincidunt, ipsum quam mattis lacus, nec tempus velit tortor nec justo. Aliquam elit velit, pharetra vel, dapibus et, dictum quis, felis. Integer imperdiet vehicula orci. Cum sociis natoque penatibus et magnis dis parturient montes, nascetur ridiculus mus.

Curabitur vitae mauris. Maecenas omare. Lorem ipsum dolor sit amet, consectetur adipiscing elit. Pellentesque malesuada. Mauris lacus. Fusce fringilla dapibus sem. Suspendisse gravida wisi id enim. Integer urna augue, lobortis nec, lobortis a, pellentesque ut, pede.

Just the essentials...

- Steps 2 & 3 are an update on this employee's progress. Steps 4 & 5 are an optional place for them to think about personal development.
- You can save your feedback and quit the system at any time.
- It's recommended that you have an offline conversation to discuss your feedback before filing the review.

[QUIT FOR NOW](#) [START ADDING FEEDBACK](#)

This page displays content delivered through the content management system **and/or summary information about the document.**

When the document status is not started this page should display a message that the document has not been started yet.

When the document status is drafted by employee this page should display a message that the document has been started but that the manager will not be able to view what the employee has written until it has been submitted.

When the document status is submitted or drafted by manager this page will display a general introduction to the mid-year review, and a sidebar calling out the core steps managers should follow.

When the document status is approved this page will display a message that the document has been sent to the employee for acknowledgment.

When the document status is acknowledged this page should display a message that the document is complete. Should it also display data points like when it was approved, whether a meeting took place, etc.?

View (3.1 V)

This page displays content delivered through the content management system and/or summary information about the document.

For all other users with access, when the document status is not started this page should show a message that the document has not been started yet.

When the document status is drafted by employee, submitted, drafted by manager, or approved, this page should display a message indicating that the document has been started but that comments will not be visible until after the employee has acknowledged the review.

When the document status is acknowledge, this page should display overview document information such as when the document was approved, whether a meeting took place, etc.

Buttons

This page will include one or two of the following buttons depending on the status and role of the viewer of the document.

Button Properties

Name	Label	Behavior
Start	<i>Start the Review</i>	<ul style="list-style-type: none">• Checks off step 1• Progresses the document to the next status (<i>not started to drafted by employee or submitted to drafted by manager</i>)• Redirects to Mid-Year General Comments page (3.3)
Next	<i>Next</i>	Redirects to Mid-Year General Comments page (3.3)

Quit	<i>Quit for Now</i>	Closes the employee record window
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Display Combinations

	Employee	Manager	All Others
Not started	Start Quit	Quit	Quit
Drafted by Employee	Next Quit	Quit	Quit
Submitted	Next Quit	Start Quit	Quit
Drafted by manager	Next Quit	Next Quit	Quit
Approved	Next Quit	Next Quit	Quit
Acknowledged	Next Quit (label just reads “Quit” here)	Next Quit (label just reads “Quit” here)	Next Quit (label just reads “Quit” here)

Open Issues

Should the overview page once the document has been acknowledged show document summary information such as when it was approved, whether a meeting took place, etc.?

Mid-Year KTO Update (3.2)

Overview

This page lists employee and manager mid-year comments on a given employee’s KTOs. It also includes the employee’s unplanned accomplishments.

Employee Draft (3.2 E)

GPS | Kelley, Mike

Employee Performance Record
Mike Kelley
Global IT Product Head

Manager & Reports V [Show Instructions >](#)

All documents Documents by Year KTOs Mid-year Review

Complete your review by working through the steps below. [Printable Version](#)

1 Read Overview 2 Update KTOs 3 Provide Comments 4 Assess Strengths 5 Write Development Plan 6 Submit Review 7 Acknowledge Manager Feedback

KTO #1
Maecenas tincidunt aliquam dui. Integer malesuada iaculis velit. Cras est libero, tincidunt nec, viverra ac, ullamcorper eu, sem. Integer placerat pede vel massa. Suspendisse sollicitudin dui vel eros. Nunc vestibulum justo eget elit. Sed ultrices semper nisl. Cras massa risus, sagittis nec, euismod pharetra, ultricies ac, eros. Nam auctor blandit urna.

This KTO is inactive ([learn more](#))
 This is a personal development KTO ([learn more](#))

Employee's Comments

[Add additional KTOs](#)

Unplanned Accomplishments
(How is this different from a KTO?)

If the document status is not started or drafted by employee, this page appears in editable form.

- Each KTO is listed and numbered sequentially in order of entry into the database. KTOs that have previously been marked inactive will appear at the bottom of the list and be grayed out.
- For all active KTOs there will be a checkbox for marking the KTO inactive. Next to the checkbox will be a “learn more” link.³ Mousing over the “learn more” link will expose a panel with a

³ Link text may change.

description of what it means to mark a KTO inactive. Mousing off the panel will hide it again. This checkbox is initially unchecked. The system should remember and display as checked any KTOs that have been marked as inactive if the user leaves and then returns to the system before submitting the Mid-Year Review.

- For all active KTOs there will be a checkbox for marking a personal development KTO. Next to the checkbox will be a “learn more” link that shows a explanation of what it means to mark a personal development KTO. This link will exhibit the same behavior described above. This checkbox is initially unchecked. The system should remember and display as checked any personal development KTOs if the user leaves and then returns to the system before submitting the Mid-Year Review.
- For each KTOs (active or inactive) there will be an eWebEditPro control where employees can enter freeform comments. These fields are optional.
- A link to add additional KTOs will appear beneath the list of KTOs. Clicking the link will show a new eWebEditPro control where users can enter the text of a new KTO. This new KTO will also have an inactive checkbox, a personal development checkbox, and an employee comments eWebEditPro control. Each time the user clicks the “add additional KTOs” link another grouping of KTO controls will appear onscreen. If a user attempts to inactivate, mark as development, or add comments to a new KTO without providing the actual text of the KTO he or she will see an error message and be prevented from proceeding when attempting to submit the form.
- There will be one extra eWebEditPro control where employees can enter unplanned accomplishments. Next to this control will be a “how is this different from a KTO” link. Mousing over this link will expose a panel with an explanation of what a user should enter into this box. Mousing off the panel will hide it again. This field is optional.

If the document status is *submitted or drafted by manager* the employee’s inputs will appear in view mode. The manager’s comments will be restricted.

- Each KTO is listed and numbered sequentially in order of entry into the database. KTOs that have previously been marked inactive will appear at the bottom of the list and be grayed out.
- KTOs that have been marked as inactive or development KTOs will be labeled accordingly.
- All employee comments will be listed beneath their respective KTOs. If the employee did not enter comments under any particular KTO, there will be a message in place of the employee comment explaining that no comments were added.
- Beneath each KTO will be a placeholder for manager comments with a note indicating that manager comments will become visible once the Mid-Year Review has been approved.
- The employee’s unplanned accomplishments will be listed if the employee has entered any. If the employee has not written any, the unplanned accomplishments label will appear with a note beneath indicating that no unplanned accomplishments were added.

If the document status is *approved* or *acknowledged* the page will appear in view mode. Both employee and manager inputs will be visible.

- Each KTO is listed and numbered sequentially in order of entry into the database. KTOs that have previously been marked inactive will appear at the bottom of the list and be grayed out.
- KTOs that have been marked as inactive or development KTOs will be labeled accordingly.
- All employee and manager comments will be listed beneath their respective KTOs. If the employee or manager did not enter comments under any particular KTO, there will be a message in place of the comment explaining that nothing was added.
- The employee's unplanned accomplishments will be listed if the employee has entered any. If the employee has not written any, the unplanned accomplishments label will appear with a note beneath indicating that no unplanned accomplishments were added.

Manager Draft (3.2 M)

The screenshot displays a web application interface for a performance review. At the top, a blue header bar contains the text "GPS | Kelley, Mike" and a close button. Below this, a grey navigation bar includes "Employee Performance Record", "Mike Kelley", "Global IT Product Head", "Manager & Reports V", and "Show Instructions >". A secondary navigation bar features "All documents", "Documents by Year" (with a dropdown set to "2005"), "KTOs", and "Mid-year Review".

The main content area is titled "Add feedback to this review by working through the steps below." and includes a "Printable Version" icon. A progress bar shows six steps: 1. Read Overview (checked), 2. Update KTOs, 3. Provide Comments, 4. Assess Strengths, 5. Write Development Plan, and 6. Approve the Review.

The current section is "KTO #1 Personal Development KTO". It contains a paragraph of placeholder text: "Nullam ut lectus. Donec tincidunt malesuada ipsum. Phasellus est dolor, dictum malesuada, egestas in, mollis sed, uma. Proin nec sapien sit amet nisl commodo vehicula." Below this are two sub-sections: "Employee's Update" with another paragraph of placeholder text, and "Manager's Update" with a large empty text input field.

The section "Unplanned Accomplishments" follows, with a paragraph of placeholder text: "Integer quis dolor eu sapien lobortis accumsan. Nam eros libero, imperdiet eget, ultrices id, dapibus nec, massa. Nunc eu tortor. Maecenas convallis dolor in leo. Vestibulum nisl mauris, commodo vitae, varius eget, porta vehicula, ipsum. Vestibulum orci justo, venenatis vel, luctus at, tempus sed, eros. Curabitur neque. Pellentesque habitant morbi tristique senectus et netus et malesuada fames ac turpis egestas."

At the bottom, there are four buttons: "SAVE & QUIT FOR NOW" (with a back arrow icon), "RECOMMEND CHANGES" (with a pencil icon), "GO BACK" (with a left arrow icon), and "SAVE & CONTINUE" (with a right arrow icon).

If the document status is not started this page will show a message that the document has not been started yet.

If the document status is drafted by employee this page will show labels for each of the sections (KTOs and Unplanned accomplishments) with a note underneath each explaining that employee comments will become visible once the Mid-Year Review has been submitted.

If the document status is submitted or drafted by manager this page will appear in editable form.

- Each KTO is listed and numbered sequentially in order of entry into the database. KTOs that have previously been marked inactive will appear at the bottom of the list and be grayed out.
- Any KTOs that have been marked inactive or development by the employee will be labeled accordingly.
- Employee comments will be displayed beneath their respective KTOs (not editable by manager). If the employee has not entered comments for a particular KTO, a note will appear in place of the comments explaining that none were added.
- An eWebEditPro control where managers can enter comments will appear beneath the employee comments area for each KTO.
- The employee's unplanned accomplishments will be listed if the employee has entered any. If the employee has not written any, the unplanned accomplishments label will appear with a note beneath indicating that no unplanned accomplishments were added.

If the document status is approved or acknowledged the page will appear in view mode. Both employee and manager inputs will be visible.

- Each KTO is listed and numbered sequentially in order of entry into the database. KTOs that have previously been marked inactive will appear at the bottom of the list and be grayed out.
- KTOs that have been marked as inactive or development KTOs will be labeled accordingly.
- All employee and manager comments will be listed beneath their respective KTOs. If the employee or manager did not enter comments under any particular KTO, there will be a message in place of the comment explaining that nothing was added.
- The employee's unplanned accomplishments will be listed if the employee has entered any. If the employee has not written any, the unplanned accomplishments label will appear with a note beneath indicating that no unplanned accomplishments were added.

View (3.2 V)

GPS | Kelley, Mike

Employee Performance Record
Mike Kelley
Global IT Product Head

Manager & Reports V [Show Instructions >](#)

All documents Documents by Year 2005 V KTOs Mid-year Review

Review your manager's comments, then indicate your approve by acknowledging your review. [Printable Version](#)

✓ Read the Overview ✓ KTO Update ✓ General Comments ✓ Strengths Assessment ✓ Personal Development ✓ Submit Review 7 Acknowledge Manager Feedback

Your manager has added feedback. Maecenas tincidunt aliquam dui. Integer malesuada iaculis velit. Cras est libero, tincidunt nec, viverra ac, ullamcorper eu, sem. Integer placerat pede vel massa. Suspendisse sollicitudin dui vel eros. Nunc vestibulum justo eget elit. Sed ultrices semper nisl. Cras massa risus, sagittis nec, euismod pharetra, ultricies ac, eros. Nam auctor blandit urna. Ut id massa.

Aliquam imperdiet, nisl a aliquet tincidunt, ipsum quam mattis lacus, nec tempus velit tortor nec justo. Aliquam elit velit, pharetra vel, dapibus et, dictum quis, felis. Integer imperdiet vehicula orci. Cum sociis natoque penatibus et magnis dis parturient montes, nascetur ridiculus mus.

Curabitur vitae mauris. Maecenas ornare. Lorem ipsum dolor sit amet, consectetur adipiscing elit. Pellentesque malesuada. Mauris lacus. Fusce fringilla dapibus sem. Suspendisse gravida wisi id enim. Integer urna augue, lobortis nec, lobortis a, pellentesque ut, pede.

What's next?

- Go through each step and review the feedback added by your manager.
- If you disagree with anything, you can request changes at any time.
- If you have no objections, finalize your review by acknowledging your manager's feedback in step 7.

[QUIT FOR NOW](#) [REVIEW MANAGER FEEDBACK](#)

For all other users with access, if the document status not started this page will show a message that the document has not been started yet.

If the document status is drafted by employee, submitted, drafted by manager, or approved this page will show labels for each of the sections (KTOs and Unplanned accomplishments) with a note underneath each explaining that employee and manager comments will become visible once the Mid-Year Review has been acknowledged.

If the document status is acknowledged, the page will appear in view mode. Both employee and manager inputs will be visible.

- Each KTO is listed and numbered sequentially in order of entry into the database. KTOs that have previously been marked inactive will appear at the bottom of the list and be grayed out.
- KTOs that have been marked as inactive or development KTOs will be labeled accordingly.
- All employee and manager comments will be listed beneath their respective KTOs. If the employee or manager did not enter comments under any particular KTO, there will be a message in place of the comment explaining that nothing was added.
- The employee’s unplanned accomplishments will be listed if the employee has entered any. If the employee has not written any, the unplanned accomplishments label will appear with a note beneath indicating that no unplanned accomplishments were added.

Buttons

This page will include some combination of the following buttons depending on the status and viewer of the document.

Button Properties

Name	Label	Behavior
Continue	<i>Save & Continue</i>	Submits the KTO update page form Checks off step 2 Redirects to Mid-Year General Comments page (3.3)
Next	<i>Go to the Next Page</i>	Redirects to Mid-Year General Comments page (3.3)
Back	<i>Go Back</i>	<i>Submits the KTO update page form if page is in editable format</i> Redirect to Mid-Year Overview (3.1)
Recommend Changes	<i>Recommend Changes</i>	<i>Submits the KTO update page form if page is in editable format</i> Redirects to Mid-Year Recommend Changes page (3.10)
Request Changes	<i>Request Changes</i>	Redirect to Mid-Year Request Changes page (3.12)
Quit	<i>Quit for Now</i>	<i>Submits the KTO update page form if page is in editable format</i> Closes the employee record window

Display Combinations

	Employee	Manager	All Others
Not started	n/a	Quit	Quit
Drafted by	Continue	Quit	Quit

Employee	Back Quit		
Submitted	Next Back Quit	Continue Back Recommend Changes Quit	Quit
Drafted by manager	Next Back Quit	Continue Back Recommend Changes Quit	Quit
Approved	Next Back Request Changes Quit	Next Back Quit	Quit
Acknowledged	Next Back Quit (label just reads "Quit" here)	Next Back Quit (label just reads "Quit" here)	Next Back Quit (label just reads "Quit" here)

Open Issues

Will recommend changes and request changes labels be modified to reflect the concept of handing a document back and/or unlocking it?

Mid-Year General Comments (3.3)

Overview

This page lists employee and manager general comments on KTOs for a given employee's KTOs.

Employee Draft (3.3 E)

GPS | Kelley, Mike

Employee Performance Record
Mike Kelley
Global IT Product Head

Manager & Reports V [Show Instructions >](#)

All documents Documents by Year 2005 v KTOs Mid-year Review

Complete your review by working through the steps below. [Printable Version](#)

1 Read Overview 2 Update KTOs 3 Provide Comments 4 Assess Strengths 5 Write Development Plan 6 Submit Review 7 Acknowledge Manager Feedback

Your Overall Comments on KTOs

SAVE & QUIT FOR NOW GO BACK SAVE & CONTINUE

If the document status is not started or drafted by employee this page appear in editable format.

- A single eWebEditpro control appears where employee can enter general comments.

If the document status is submitted or drafted by manager this page appear in view mode with restricted manager comments.

- Employee comments will be displayed beneath “your overall comments” label.⁴ If the employee has not entered general comments a note will appear in their place indicating that no general comments were added.
- A placeholder for manager general comments will appear beneath the employee general comments section, with a note indicating that manager general comments will become visible once the Mid-Year Review has been approved.

If the document status is approved or acknowledged the page appears in view mode.

- Employee comments will be displayed beneath “your overall comments” label. If the employee has not entered general comments a note will appear in their place indicating that no employee general comments were added.
- Manager comments will be displayed beneath “manager’s overall comments” label. If the manager has not entered general comments a note will appear in their place indicating that no manager general comments were added.

⁴ Label text may change.

Manager Draft (3.3 M)

The screenshot displays a web application interface for a performance review. At the top, a blue header bar contains the text 'GPS | Kelley, Mike' and a close button. Below this, a grey navigation bar shows 'Employee Performance Record' and 'Mike Kelley, Global IT Product Head'. A 'Manager & Reports V' button and a 'Show Instructions >' link are also present. A secondary navigation bar includes 'All documents', 'Documents by Year' (set to 2005), 'KTOs', and 'Mid-year Review'. The main content area features a large heading: 'Add feedback to this review by working through the steps below.' To the right is a 'Printable Version' icon. A progress bar below the heading shows six steps: 1. Read Overview (checked), 2. Update KTOs (checked), 3. Provide Comments (active), 4. Assess Strengths, 5. Write Development Plan, and 6. Approve the Review. The 'Provide Comments' section is divided into two parts: 'Employee's Overall Comments on KTOs' with a text area containing placeholder text, and 'Manager's Overall Comments on KTOs' with a larger empty text area. At the bottom, there are four buttons: 'SAVE & QUIT FOR NOW', 'RECOMMEND CHANGES', 'GO BACK', and 'SAVE & CONTINUE'.

If the document status is not started this page will show a message that the document has not been started yet.

If the document status is drafted by employee this page will show labels for each of the sections (employee general comments and manager general comments).

- A note beneath the employee general comments label will indicate that employee comments will be visible once Mid-Year Review has been submitted.

- A note beneath the manager general comments label will indicate that managers can add their general comments once the Mid-Year Review has been submitted.

If the document status is submitted or drafted by manager this page will appear in editable form.

- Employee comments will be displayed beneath the “employee’s overall comments” label. If the employee has not entered general comments a note will appear in their place indicating that no employee general comments were added.
- A single eWebEditpro control will appear where the manager can enter general comments.

If the document status is approve or acknowledged this page will appear in view mode.

- Employee comments will be displayed beneath the “employee’s overall comments” label. If the employee has not entered general comments a note will appear in their place indicating that no employee general comments were added.
- Manager comments will be displayed beneath “manager’s overall comments” label. If the manager has not entered general comments a note will appear in their place indicating that no manager general comments were added.

View (3.3 V)

The screenshot shows a web application interface for reviewing performance records. At the top, the user is identified as 'GPS | Kelley, Mike'. Below this, the page title is 'Employee Performance Record' for 'Mike Kelley, Global IT Product Head'. There are navigation tabs for 'Manager & Reports V' and 'Show Instructions >'. A filter bar shows 'All documents', 'Documents by Year' (set to 2005), 'KTOs', and 'Mid-year Review'. The main heading reads: 'Review your manager's comments, then indicate your approve by acknowledging your review.' A progress bar at the top of the content area shows steps: 'Read Overview', 'Update KTOs', 'Provide Comments', 'Assess Strengths', 'Write Development Plan', 'Submit Review', and '7 Acknowledge Manager Feedback'. The current step is '7 Acknowledge Manager Feedback'. The content area contains two sections of placeholder text: 'Employee's Overall Comments on KTOs' and 'Manager's Overall Comments on KTOs'. At the bottom, there are four buttons: 'QUIT FOR NOW', 'REQUEST CHANGES', 'GO BACK', and 'GO TO THE NEXT PAGE'.

For all other users with access, if the document status not started this page will show a message that the document has not been started yet.

If the document status is drafted by employee, submitted, drafted by manager, or approved this page will show labels for each of the sections (employee general comments and manager general comments) with a note underneath each explaining that employee and manager comments will become visible once the Mid-Year Review has been acknowledged.

If the document status is acknowledged, the page will appear in view mode. Both employee and manager comments will be visible.

- Employee comments will be displayed beneath the “employee’s overall comments” label. If the employee has not entered general comments a note will appear in their place indicating that no employee general comments were added.
- Manager comments will be displayed beneath the “manager’s overall comments” label. If the manager has not entered general comments a note will appear in their place indicating that no manager general comments were added.

Buttons

This page will include some combination of the following buttons depending on the status and viewer of the document.

Button Properties

Name	Label	Behavior
Continue	<i>Save & Continue</i>	Submits KTO General Comments form Checks off step 3 Redirects to Mid-Year Draft Break page (3.4)
Next	<i>Go to the Next Page</i>	Redirects to Mid-Year Strengths Assessment page (3.5)
Back	<i>Go Back</i>	<i>Submits the KTO General Comments page form if page is in editable format</i> Redirects to Mid-Year KTO Update page (3.2)
Recommend Changes	<i>Recommend Changes</i>	<i>Submits the KTO General Comments page form if page is in editable format</i> Redirects to Mid-Year Recommend Changes page (3.10)
Request Changes	<i>Request Changes</i>	Redirects to Mid-Year Request Changes page (3.12)
Quit	<i>Quit for Now</i>	<i>Submits the KTO General Comments page form if page is in editable format</i> Closes employee record window

Display Combinations

	Employee	Manager	All Others
Not started	n/a	Quit	Quit
Drafted by Employee	Continue Back Quit	Quit	Quit
Submitted	Next Back Quit	Continue Back Quit	Quit

		Recommend Changes	
Drafted by manager	Next	Continue	Quit
	Back	Back	
	Quit	Quit	
		Recommend Changes	
Approved	Next	Next	Quit
	Back	Back	
	Request Changes	Quit	
	Quit		
Acknowledged	Next	Next	Quit (label just reads “quit” here)
	Back	Back	
	Quit (label just reads “quit” here)	Quit (label just reads “quit” here)	

Mid-Year Draft Break (3.4)

Overview

This page is a mid-way point between the KTO section and the development section of the mid-year review. It displays a message indicating to employee and managers they have finished the first section and are about to move on to the second. This page can only be accessed through the form post from the button on the editable Mid-Year General Comments page (3.3), which limits this page to managers and employees.

Employee View (3.4 E)

GPS | Kelley, Mike

Employee Performance Record
Mike Kelley
Global IT Product Head

Manager & Reports V [Show Instructions >](#)

All documents Documents by Year 2005 v KTOs Mid-year Review

Complete your review by working through the steps below. [Printable Version](#)

✓ Read Overview ✓ Update KTOs ✓ Provide Comments **4 Assess Strengths** 5 Write Development Plan 6 Submit Review 7 Acknowledge Manager Feedback

You're done with the KTO update section of the mid-year review.

The next two steps are new!
They give you an opportunity to think about your personal development. (If you want to skip them, you can just submit your review now by clicking on step 6 in the bar above.)

← QUIT FOR NOW GO BACK CONTINUE

If the document status is not started, submitted, drafted by manager, approved, or acknowledged, this page is not accessible.

If the document status is drafted by employee this page shows a block of text served through the content management system indicating that the first part of the Mid-Year Review is done and the user is now moving on to the second part, which, by the way, is optional.

Manager View (3.4 M)

GPS | Kelley, Mike

Employee Performance Record
Mike Kelley
Global IT Product Head

Manager & Reports V [Show Instructions >](#)

All documents Documents by Year 2005 v KTOs Mid-year Review

Add feedback to this review by working through the steps below. [Printable Version](#)

✓ Read Overview ✓ Update KTOs ✓ Provide Comments **4 Assess Strengths** 5 Write Development Plan 6 Approve the Review

You're done adding feedback to the KTO update section of the review.

The next two steps are new.
They relate to the employee's personal development goals.

[SAVE & QUIT FOR NOW](#) [GO BACK](#) [SAVE & CONTINUE](#)

If the document status is not started, drafted by employee, submitted, approved, or acknowledged, this page is not accessible.

If the document status is drafted by manager this page shows a block of text served through the content management system indicating that the user is done with the first part of the Mid-Year Review and that they are now moving on to the second part.

Buttons

This page will include the following three buttons depending on the status and viewer of the document.

Button Properties

Name	Label	Behavior
Continue	<i>Continue</i>	Checks off step 4 Redirect to Mid-Year Strengths Assessment (3.5)
Back	<i>Go Back</i>	Redirects to Mid-Year KTO General Comments (3.3)
Quit	<i>Quit</i>	Closes employee record window

Display Combinations

	Employee	Manager	All Others
Not started	n/a	n/a	n/a
Drafted by Employee	Continue Back Quit	n/a	n/a
Submitted	n/a	Continue Back Quit	n/a
Drafted by manager	n/a	Continue Back Quit	n/a
Approved	n/a	n/a	n/a
Acknowledged	n/a	n/a	n/a

Mid-Year Strength Assessment (3.5)

GPS | Kelley, Mike

Employee Performance Record Manager & Reports V [Show Instructions >](#)

Mike Kelley
Global IT Product Head

All documents | Documents by Year | KTOs | Mid-year Review

Review your manager's comments, then indicate your approve by acknowledging your review. Printable Version

✓ Read Overview | ✓ Update KTOs | ✓ Provide Comments | ✓ Assess Strengths | ✓ Write Development Plan | ✓ Submit Review | **7 Acknowledge Manager Feedback**

Selected competencies	Mike does this...	Never	Sometimes	Often	All the time
Vision & Strategy Employee's Ratings Manager's Ratings			●	●	
Developing People Manager's Ratings					●
Lorem ipsum dolor sit amet Manager's Ratings					●

Overview

This page lists competencies that are relevant for the completion of a given employee's KTOs and includes employee and manager ratings on how frequently the employee demonstrates the selected competencies.

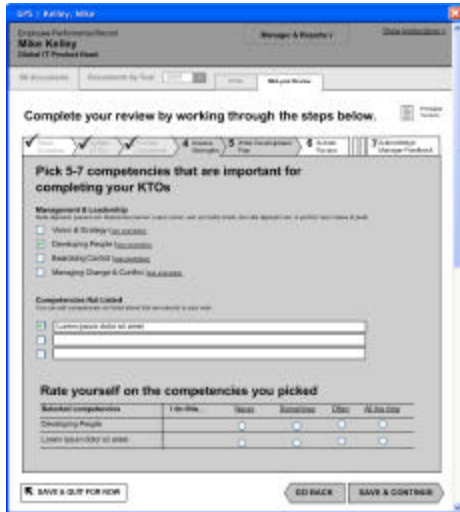
Access & Views

The standard view is a table of selected competencies and ratings. If the employee and the manager have provided ratings for the selected competency, both ratings will be displayed. If only one of those people has provided a rating, only their ratings will be shown.

Depending on the status and viewer of the document, this page may appear in editable form.

Document Owners

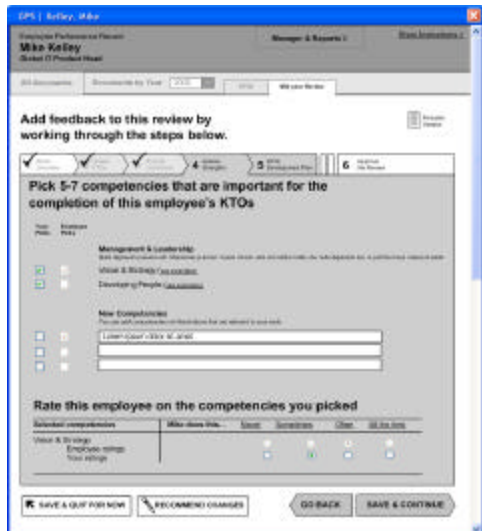
If the document status is *not started* or *drafted* employee and the user viewing the document is the owner, he or she will see an editable version of this page as depicted below.



If the document status is *submitted* or *drafted by manager* the employee will see a message indicating that manager selections will become visible once the document has been approved.

Direct Managers

If the document status is *submitted* or *drafted by manager* and the user viewing the document is the manager of the owner, he or she will see an editable version of this page as depicted below.



If the document status is *not started* or *drafted by employee* the manager will see a message indicating that the employees selections will become visible once the document has been submitted.

All Others

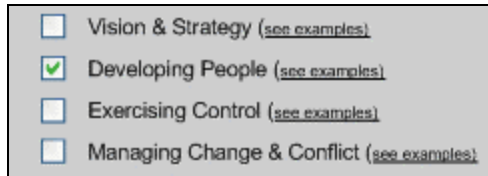
All other users with access rights on the given document will see the standard view, unless the document has not been acknowledged yet. In that case, such users will see a message indicating that the contents will become visible once the document has been acknowledged.

Functionality

This page includes a “see examples” link next to each competency. Scrolling over this link exposes a hidden panel listing examples. Scrolling off the panel hides it again.

Document Owners

The employee’s editable version shows a list of all BGI competencies (with three placeholders for additional competencies) and adjacent checkboxes.



<input type="checkbox"/>	Vision & Strategy (see examples)
<input checked="" type="checkbox"/>	Developing People (see examples)
<input type="checkbox"/>	Exercising Control (see examples)
<input type="checkbox"/>	Managing Change & Conflict (see examples)

The user will tick the checkboxes to select individual competencies that they consider important for completing their KTOs. As a checkbox is ticked, the selected competency will also be populated in the table at the bottom of the page, where the user can provide a rating for the selected competency. Deselecting a competency in the top section should also remove it from the table at the bottom.

Direct Managers

The manager’s editable version shows the same list of BGI competencies with adjacent checkboxes, but it also includes a separate column of disabled checkboxes indicating the competencies that were selected by the employee.



<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Vision & Strategy (see examples)
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Developing People (see examples)

Managers will tick the checkboxes in the enabled column to select the competencies they consider important for the employee to complete his or her KTOs. All competencies that were selected by the employee will be pre-populated in the table at the bottom of the page, with the employee’s rating displayed beneath. As the manager ticks a checkbox, if the employee has not already selected the competency, it will be added to the list at the bottom of the page with controls for the manager to input a rating. If the employee has already selected the competency, controls for the manager’s rating will simply be added to the existing competency listing in the table at the bottom of the page. Deselecting a competency will reverse the behavior.

Fields

Document Owners

The editable version for employees will include a checkbox for each competency. Three empty textboxes will be provided with a 255 character limit where employees can enter additional competencies. These textboxes will also have a checkbox to indicate selection. (JavaScript should be added so that if the user clicks onto the textbox the corresponding checkbox is checked automatically and if the user deselects the checkboxes next to a textbox the contents of the textbox are removed.)

The editable employee version will also include a radio button grouping for each selected competency. The grouping will contain four radio buttons that the employee will chose from in order to rate how often they use the given competency.

Direct Manager

The editable version for managers will include one enabled checkbox and one disabled checkbox for each competency. The employee's selection will be pre-populated in the disabled checkbox, where relevant. Three empty textboxes will be provided with a 255 character limit where managers can enter additional competencies. These textboxes will also have a checkbox to indicate selection. Any custom competencies previously entered by the employee will appear in a disabled textbox – also with a disabled and an enabled checkbox.

The editable manager version will also include as many as two radio button grouping for each selected competency – a disabled grouping for the employee rating and an enabled grouping for the manager selection. Each grouping will contain four radio button.

Buttons

Technical Note

The behaviors described in the functionality section should be handled in client-side code, so the page does not need to refresh each time the user selects an additional competency.

Mid-Year Development Plan (3.6)

GPS | Kelley, Mike

Employee Performance Record
Mike Kelley
Global IT Product Head

Manager & Reports V [Show Instructions >](#)

All documents Documents by Year 2005 V KTOs Mid-year Review

Review your manager's comments, then indicate your approve by acknowledging your review. [Printable Version](#)

✓ Read Overview ✓ Update KTOs ✓ Provide Comments ✓ Assess Strengths ✓ Write Development Plan ✓ Submit Review 7 Acknowledge Manager Feedback

Development Plan: Possess strong work ethic

Employee's Plan for Developing Skills
Vestibulum orci justo, venenatis vel, luctus at, tempus sed, eros. Curabitur neque. Pellentesque habitant morbi tristique senectus et netus. Aliquam ac quam quis pede varius aliquam. Integer quis dolor eu sapien lobortis accumsan.

Manager's Comments
Vestibulum orci justo, venenatis vel, luctus at, tempus sed, eros. Curabitur neque. Pellentesque habitant morbi tristique senectus et netus. Aliquam ac quam quis pede varius aliquam. Integer quis dolor eu sapien lobortis accumsan.

Overall Comments on Personal Development

Employee's Comments
Vestibulum orci justo, venenatis vel, luctus at, tempus sed, eros. Curabitur neque. Pellentesque habitant morbi tristique senectus et netus.

Manager's Comments
Vestibulum orci justo, venenatis vel, luctus at, tempus sed, eros. Curabitur neque. Pellentesque habitant morbi tristique senectus et netus.

QUIT FOR NOW REQUEST CHANGES GO BACK ACKNOWLEDGE THE FEEDBACK

Overview

This page displays the employee's development plan with manager comments, as well as general comments on personal development for a given employee.

Access & Views

This screenshot shows the 'Pick a Competency for Development' step of a performance review. The interface includes a progress bar at the top with five steps: '1. Review Performance', '2. Review Goals', '3. Review Development Plan', '4. Pick a Competency for Development', and '5. Add Feedback'. The current step is highlighted. Below the progress bar, the text reads 'Complete your review by working through the steps below.' The main content area is titled 'Pick a Competency for Development' and features a 'Select' button, a dropdown menu with 'Developing People' selected, and a text input field containing 'Plan for building skills'. Below this is another 'Select' button and a text input field with 'Lorem ipsum dolor sit amet'. A large text area for 'Your Overall Comments on Personal Development' is also present. At the bottom, there are buttons for 'SAVE & QUIT FOR NOW', 'GO BACK', and 'SAVE & CONTINUE'.

This screenshot shows the 'Add feedback to this review' step of a performance review. The progress bar at the top shows the current step as '5. Add Feedback', which is highlighted. The text reads 'Add feedback to this review by working through the steps below.' The main content area is titled 'Competency for Development' and includes a sub-section 'Managing Change & Conflict' with an 'Employee's Development Plan' and a 'Manager's Comments' text input field. Below this is another sub-section 'Overall Comments on Personal Development' with an 'Employee's Comments' and a 'Manager's Comments' text input field. At the bottom, there are buttons for 'SAVE & QUIT FOR NOW', 'RECOMMEND CHANGES', 'GO BACK', and 'SAVE & CONTINUE'.

Functionality

Fields

Buttons

Open Issues

Mid-Year Draft Done (3.7)

The screenshot shows a web application window titled "GPS | Kelley, Mike". The main content area is for an "Employee Performance Record" for "Mike Kelley, Global IT Product Head". The page is titled "Mid-year Review" and shows a progress bar with seven steps: 1. Read Overview, 2. Update KTOs, 3. Provide Comments, 4. Assess Strengths, 5. Write Development Plan, 6. Submit Review, and 7. Acknowledge Manager Feedback. Steps 1-5 are completed, and step 6 is the current step. A message box states: "You're done entering information, but you need to submit your review to your manager. Or you can quit for now and submit your review at another time." Below the message are three buttons: "QUIT FOR NOW", "GO BACK", and "CONTINUE TO SUBMIT".

Overview

This page indicates the end point for the data-entry portion of the mid-year review. It displays a message indicating to employees and managers that they have finished drafting their comments and what their next steps are.

Access & Views

Functionality

Fields

Buttons

Open Issues

Mid-Year Submit (3.8)

The screenshot shows a web application window titled "GPS | Kelley, Mike". The main content area is for an "Employee Performance Record" for "Mike Kelley, Global IT Product Head". The page is titled "Mid-year Review" and includes a progress bar with seven steps: 1. Read Overview, 2. Update KTOs, 3. Provide Comments, 4. Assess Strengths, 5. Write Development Plan, 6. Submit Review (current step), and 7. Acknowledge Manager Feedback. Below the progress bar, a section titled "The following items will be submitted to your manager:" lists four items with checkmarks: KTO Update, General Comments, Strengths Assessment, and Development Plan. There is a text input field for an optional message to the manager and a checkbox for "Send a copy of this email to myself". At the bottom, there are three buttons: "QUIT FOR NOW", "GO BACK", and "SUBMIT REVIEW".

GPS | Kelley, Mike

Employee Performance Record
Mike Kelley
Global IT Product Head

Manager & Reports V Show Instructions >

All documents Documents by Year 2005 v KTOs Mid-year Review

Complete your review by working through the steps below. Printable Version

✓ Read Overview ✓ Update KTOs ✓ Provide Comments ✓ Assess Strengths ✓ Write Development Plan 6 Submit Review 7 Acknowledge Manager Feedback

The following items will be submitted to your manager:

- ✓ KTO Update
- ✓ General Comments
- ✓ Strengths Assessment
- ✓ Development Plan

Add a message below for the email that is sent to your manager. (optional)

Send a copy of this email to myself

QUIT FOR NOW GO BACK SUBMIT REVIEW

Overview

This page allows the document owner to submit what he or she has written to his or her manager. The document's status is updated, locking the employee's comments and transferring the document to the manager to add his or her comments.

Access & Views

This page is only accessible to the employee.

After the mid-year review has been submitted (document status is Submitted, Approved or Acknowledged) this page only shows a message saying that the review has been submitted to the manager.

When the mid-year review is in Drafted status the editable version is shown. When the employee comes to this page (either through the step navigation or from **Error! Reference source not found.**) introductory text is shown, followed by a list of the document steps that the employee has completed.

Fields

In the editable version:

There is a text area where the employee can type comments that will be sent to the manager in an email. These comments will not be stored in the system.

There is an option to have a copy of the email sent to the employee. This option is selected by default.

Buttons

The Submit to Manager button updates the document status to Submitted and sends an email to the manager (**Needs to reference the standard email page...**). The email will contain whatever message the employee entered into the text area field. If the "send copy" field was checked, the same email is also sent to the employee.

For the actions of the other buttons see **need reference to standard buttons section.**

Mid-Year Approve (3.9)

The screenshot shows a web browser window titled "GPS | Kelley, Mike". The page header includes "Employee Performance Record" and "Mike Kelley, Global IT Product Head". A navigation bar contains "All documents", "Documents by Year" (set to 2005), "KTOs", and "Mid-year Review". A "Printable Version" link is visible in the top right. The main content area features a progress bar with steps: "Read Overview", "Update KTOs", "Provide Comments", "Assess Strengths", "Write Development Plan", and "6 Approve the Review". A prominent message states: "Meeting with the employee is recommended before approving the review." Below this is a checkbox labeled "I have met with this employee to discuss my feedback". A text area for "Additional Comments (optional)" is provided, along with a checked checkbox for "Send a copy of this email to myself". At the bottom, there are four buttons: "QUIT FOR NOW", "RECOMMEND CHANGES", "GO BACK", and "APPROVE REVIEW".

Overview

This page allows the manager to indicate that he or she is done adding comments and signal acceptance of what the employee has written by formally approving the mid-year review. This action locks both manager and employee comments.

Access & Views

This page is only accessible to the manager.

After the mid-year review has been approved (document status is Approved or Acknowledged) this page only shows a message saying that the review has been approved and returned to the employee for acknowledgement.

When the mid-year review is in Submitted or Manager Drafted status, the editable version is shown.

Fields

In the editable version:

There is a text area where the manager can type comments that will be sent to the employee in an email. These comments will not be stored in the system.

There is an option to have a copy of the email sent to the manager. This option is selected by default.

There is a checkbox where the manager can indicate that a meeting with the employee occurred. This field is optional and is not checked by default. If a the manager has previously indicated that a meeting occurred, the checkbox should be checked.⁵

Buttons

The Approve Review button updates the document status to Approved and sends an email to the employee (Needs to reference the standard email page...). The email will contain whatever message the manager entered into the text area field. If the “send copy” field was checked, the same email is also sent to the manager.

The cancel button takes the user back to the previous page.

Open Issues

Where is the value of the “met with employee” checkbox displayed?

⁵ This would be the case if the manager approved the review and then the employee requested changes.

Mid-Year Recommend Changes (3.10)

The screenshot shows a web browser window titled "GPS | Kelley, Mike". The page header includes "Employee Performance Record" and "Mike Kelley, Global IT Product Head". Navigation tabs include "All documents", "Documents by Year" (set to 2005), "KTOs", and "Mid-year Review". A "Printable Version" link is visible in the top right.

The main content area features a progress bar with six steps: 1. Read Overview, 2. Update KTOs, 3. Provide Comments, 4. Assess Strengths, 5. Write Development Plan, and 6. Approve the Review. Step 6 is currently active.

The central instruction reads: "Return the mid year review to this employee with recommended changes." Below this is a text input field labeled "Recommend changes:". At the bottom right of the input area, there is a checkbox labeled "Send a copy of this email to myself" which is checked.

At the bottom of the form, there are two buttons: "CANCEL" and "RECOMMEND CHANGES".

Overview

If the manager does not want to approve the review, he or she can return the document to the employee by recommending changes. This resets the document's status to Drafted and transfers the document back to the employee to implement changes.

Access & Views

This page is only accessible to the manager when the document is in the Submitted or Manager Drafted states. If the document is not in one of these states, there should be no way to reach this page and an error should be shown.

Fields

There is a text area where the manager can type comments that will be sent to the employee in an email. These comments will not be stored in the system.

There is an option to have a copy of the email sent to the manager. This option is selected by default.

Buttons

The Recommend Changes button updates the document status to Drafted and sends an email to the employee (Needs to reference the standard email page...). The email will contain whatever message the manager entered into the text area field. If the “send copy” field was checked, the same email is also sent to the manager

The cancel button takes the user back to the previous page.

Open Issues

Mid-Year Acknowledge (3.11)

The screenshot shows a web browser window titled "GPS | Kelley, Mike". The page header includes "Employee Performance Record" and "Mike Kelley, Global IT Product Head". A navigation bar shows "All documents", "Documents by Year" (set to 2005), "KTOs", and "Mid-year Review". The main content area features a progress bar with steps: "Read Overview", "Update KTOs", "Provide Comments", "Assess Strengths", "Write Development Plan", "Submit Review", and "7 Acknowledge Manager Feedback". The current step is "7 Acknowledge Manager Feedback". Below the progress bar, a large box asks "Did you meet with your manager and discuss your review?". It includes a text input field for "If you did meet, enter the meeting date:" and a note: "If you didn't meet, just click the acknowledge button." At the bottom, there are three buttons: "QUIT FOR NOW", "REQUEST CHANGES", and "ACKNOWLEDGE".

Overview

This page allows the employee to acknowledge the manager's comments and formally close the review process. This is the last step in the mid-year review process. Once it is completed, the review is complete and visible to anyone with access rights to the document.

Access & Views

This page is only accessible to the employee.

Before the mid-year review is Approved this page only shows a message saying that the review will be acknowledged after it is approved by the manager.

When the mid-year review is in Approved status the editable version is shown. When the employee comes to this page (either through the step navigation or from **Error! Reference source not found.**) introductory text is shown followed by the editable fields.

Fields

There is a text field where the employee can enter the date a review meeting took place. The field is optional.

Functionality

A calendar function should allow the employee to easily select the date that the meeting took place.

Buttons

The Acknowledge button updates the document status to Acknowledge.

For the actions of the other buttons see **need reference to standard buttons section.**

Open Issues

Mid-Year Request Changes (3.12)

The screenshot shows a web application interface for an employee performance record. At the top, the user is identified as 'GPS | Kelley, Mike'. Below this, the employee's name 'Mike Kelley' and title 'Global IT Product Head' are displayed. A navigation bar includes 'All documents', 'Documents by Year' (set to 2005), 'KTOs', and 'Mid-year Review'. The main heading is 'Request Changes', with a 'Printable Version' link. A progress bar shows steps: Read Overview, Update KTOs, Provide Comments, Assess Strengths, Write Development Plan, Submit Review, and Acknowledge Manager Feedback (7). The main content area contains the instruction: 'Return the mid year review to your manager with a request to change their remarks. Please describe the changes you are requesting below.' Below this is a text input field labeled 'Requested changes:'. At the bottom right of the input area is a checkbox 'Send a copy of this email to myself' which is checked. At the bottom of the page are two buttons: 'QUIT FOR NOW' and 'REQUEST CHANGES'.

Overview

As an alternate to acknowledging the review, this page allows employees to request changes to what the manager has written. This unlocks the manager's draft and transfers the document back to the manager to implement changes. The document's status is set to manager draft.

Access & Views

This page is only accessible to the manager when the document is in the Acknowledge state. If the document is not in that states, there should be no way to reach this page and an error should be shown.

Fields

There is a text area where the employee can type comments that will be sent to the manager in an email. These comments will not be stored in the system.

There is an option to have a copy of the email sent to the employee. This option is selected by default.

Buttons

The Request Changes button updates the document status to Manager Drafted and sends an email to the manager (Needs to reference the standard email page..). The email will contain whatever message the employee entered into the text area field. If the “send copy” field was checked, the same email is also sent to the employee.

The cancel button takes the user back to the previous page.

Open Issues

Mid-Year Printable Version (3.13)

Mike Kelley
2005 Mid-Year Review
 Status: *Acknowledged*

KTO Update

KTO #1 (Development KTO)
 Nullam ut lectus. Donec inodiam malesuada ipsum. Phasellus est dolor, dictum malesuada, egetas in, mollis sed, urna. Proin nec sapien ut amet nisl commodo vehicula. Nullam ut lectus. Donec inodiam malesuada ipsum. Phasellus est dolor, dictum malesuada, egetas in, mollis sed, urna. Proin nec sapien ut amet nisl commodo vehicula. Nullam ut lectus.

Employee's Comments
 Nulla dignissim posuere elit. Maecenas pulvinar. Fusce rutrum, wisi vel metis mollis, dui nulla dignissim dui, ut porttitor risus massa id pede. Sed et lectus. Aenean ut ante. Mauris vitae ipsum. Cras ultrices purus et justo. In laudis. Suspendisse leo nunc, pellentesque eu, auctor vel, vulpate id, wisi. Nulla gravida ante quis diam. Proin congue lacrima lorem. Phasellus et enim. Praesent ut amet magna quis tortor nonummy sollicitudin. Suspendisse sodales condimentum massa.

Manager's Comments
 Aliquam ac quam quis pede varius aliquam. Integer quis dolor eu sapien laboris accumsan. Nam eros libero, imperdiet eget, ultrices id, dapibus nec, massa. Nunc eu tortor. Maecenas convallis dolor in leo. Vestibulum nisl mauris, commodo vitae, varius eget, porta vehicula, ipsum. Vestibulum orci justo, venenatis vel, lectus at, tempus sed, eros. Curabitur neque. Pellentesque habitant morbi tristique senectus et netus et malesuada fames ac turpis egestas. Vestibulum est lorem, commodo a, posuere non, accumsan id, pede. Suspendisse ut lacus ac mauris fingo la tincidunt. Nullam aliquet leo in odio.

Unplanned Accomplishments
 Nullam ut lectus. Donec inodiam malesuada ipsum. Phasellus est dolor, dictum malesuada, egetas in, mollis sed, urna. Proin nec sapien ut amet nisl commodo vehicula. Nullam ut lectus. Donec inodiam malesuada ipsum. Phasellus est dolor, dictum malesuada, egetas in, mollis sed, urna. Proin nec sapien ut amet nisl commodo vehicula.

Overall Comments on KTOs

Employee's Comments
 Nulla dignissim posuere elit. Maecenas pulvinar. Fusce rutrum, wisi vel metis mollis, dui nulla dignissim dui, ut porttitor risus massa id pede. Sed et lectus. Aenean ut ante. Mauris vitae ipsum. Cras ultrices purus et justo. In laudis. Suspendisse leo nunc, pellentesque eu, auctor vel, vulpate id, wisi. Nulla gravida ante quis diam. Proin congue lacrima lorem. Phasellus et enim.

Manager's Comments
 Aliquam ac quam quis pede varius aliquam. Integer quis dolor eu sapien laboris accumsan. Nam eros libero, imperdiet eget, ultrices id, dapibus nec, massa. Nunc eu tortor. Maecenas convallis dolor in leo. Vestibulum nisl mauris, commodo vitae, varius eget, porta vehicula, ipsum. Vestibulum orci justo, venenatis vel, lectus at, tempus sed, eros. Curabitur neque.

Personal Development

Selected competencies	Mike does this...	Never	Sometimes	Often	All the time
Vision & Strategy <small>Employee's Rating</small> <small>Manager's Rating</small>			<input type="radio"/>	<input type="radio"/>	
Developing People <small>Manager's Rating</small>					<input type="radio"/>
Learn (ipsum dolor sit amet) <small>Manager's Rating</small>					<input type="radio"/>

Development Plan: Possess a strong work ethic

Employee's Development Plan
 Vestibulum orci justo, venenatis vel, lectus at, tempus sed, eros. Curabitur neque. Pellentesque habitant morbi tristique senectus et aetas.

Manager's Comments
 Vestibulum orci justo, venenatis vel, lectus at, tempus sed, eros. Curabitur neque. Pellentesque habitant morbi tristique senectus et aetas.

General Comments on Personal Development

Employee's Comments
 Nulla dignissim posuere elit. Maecenas pulvinar. Fusce rutrum, wisi vel metis mollis, dui nulla dignissim dui, ut porttitor risus massa id pede. Sed et lectus. Aenean ut ante. Mauris vitae ipsum.

Manager's Comments
 Aliquam ac quam quis pede varius aliquam. Integer quis dolor eu sapien laboris accumsan. Nam eros libero, imperdiet eget, ultrices id, dapibus nec, massa. Nunc eu tortor.

Overview

This is the printable version of the mid-year review.

Access & Views

This page is accessible to all users with access rights to a document through a link available on each page of the mid-year review document.

The standard view of this document includes all comments added by the employee and the manager. Each section of the document and their contents are shown in the same order as they appear on the standard pages.

Content is suppressed from view based on the document's status and the current user.

	Not Started	Drafted	Submitted and Manager Draft	Approved	Acknowledged
Employee	N/A	Employee's comments	Employee's comments	All	All
Manager	N/A	Nothing	All	All	All
Others with Access	N/A	Nothing	Nothing	Nothing	All

Whenever content is not visible to a user, a message should be shown in its place indicating that the content is not visible at this time.

Whenever there is no content for a section a message should be shown indicating that there is no content to show.⁶

Administration Pages

Administration Page

Administration pages are available to the handful of users with permissions to administer user profiles, exercise super viewing rights, run reports, or update system settings. Like the home page, administration pages load into the primary window of the application (not a popup window).

Administration pages are accessible through links in the top right corner of the primary window. These links are only displayed to users with the appropriate access.

The specifications for the individual administration pages are detailed further in this document under the *Page-Level Specifications*.

⁶ This is like the page on the electric bill that says "This page intentionally left blank" and is there so that people don't wonder why content is "missing."

User Administration (10.1)

GPS | Home

bip human resources global performance system

GPS Home | Administration | Super View | Reports | FAQ | Log Off

Users Documents Competencies Domains

Find a User

Name:

Role:

Group:

Juan	Thomas	Web Developer	Client Technology	<input type="button" value="→"/>
Jill	Richards	Sales Associate	International Sales	<input type="button" value="→"/>
James	Li	Account Rep	International Sales	<input type="button" value="→"/>
Heather	Thomas	Researcher	Research & Analysis	<input type="button" value="→"/>
Juan	Thomas	Web Developer	Client Technology	<input type="button" value="→"/>
Jill	Richards	Sales Associate	International Sales	<input type="button" value="→"/>
James	Li	Account Rep	International Sales	<input type="button" value="→"/>
Heather	Thomas	Researcher	Research & Analysis	<input type="button" value="→"/>
Juan	Thomas	Web Developer	Client Technology	<input type="button" value="→"/>
Jill	Richards	Sales Associate	International Sales	<input type="button" value="→"/>
James	Li	Account Rep	International Sales	<input type="button" value="→"/>

Name: Jeffrey Coleman
 Functional Title: Systems Development Manager
 Group: Global Technology
 Manager: [Tim Swan](#)
 Direct Reports: [Anupa Arora](#)
[Leah Buley](#)
[Christine Lewis](#)
[Jason Williams](#)

Admin status: Yes No
 Reporter status: Yes No

Super Viewer: Jeff currently has no supervisor privileges

Privileges:

Documents:

2006

KTOs
 Status: Approved
 Shares: Anupa Arora Systems Developer
 Leah Buley Web Developer
 Christine Lewis Web Developer
 Diane Lumley Manager, Global HR Ops
 Jason Williams Systems Developer

Mid-Year Review
 Status: Approved

Peer Review

Overview

This page allows system administrators to manage settings associated with a user profile. From here administrators can change the user's manager, assign administrator, reporter, or super viewer status, share the given users documents with others, or change the status of existing documents.

Functionality

Buttons

Open Issues

