



**SilkRoad Performance  
(WingSpan) User Guide**  
Version 2019.1

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# Introduction

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## About this guide

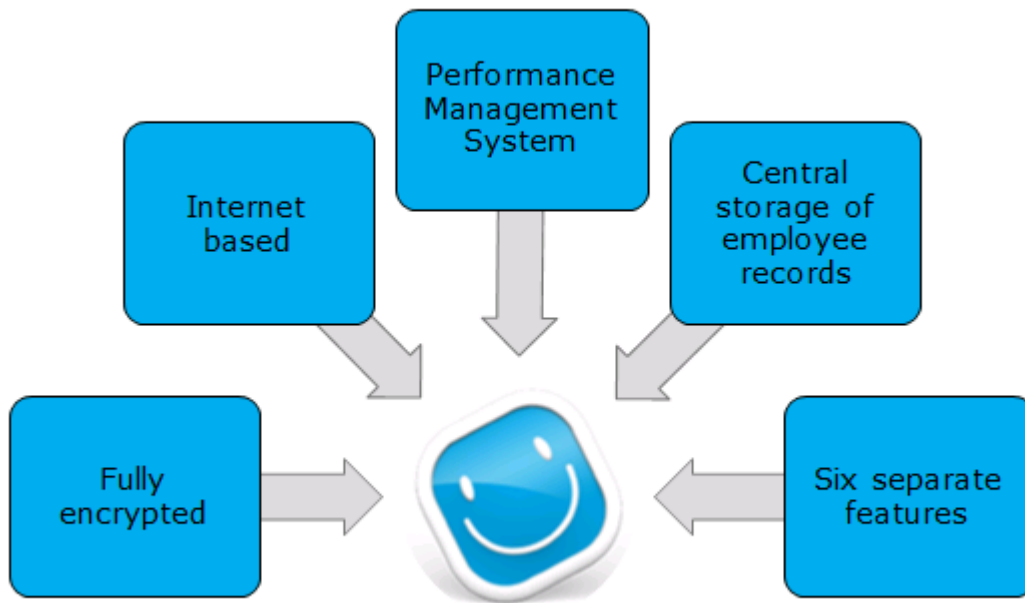
This guide provides conceptual and task-oriented information about the function and operation of SilkRoad Performance.

## SilkRoad Performance

SilkRoad Performance is an internet-based, performance management system that:

- Facilitates year-end and interim employee reviews, providing employees and managers with accurate, comprehensive and timely data to create appraisals.
- Provides the tools to measure individual competencies and skills against professional standards.
- Ensures that goals are created at each level of the organization and are aligned with corporate goals.

- Provides an objective approach to identifying, assessing, rating and managing candidates for succession planning.



## Available modules

SilkRoad Performance offers the following modules:

- Appraisals
- Assessments
- Development Planning
- Performance Planning: Goals
- Succession Planning

## Supported browsers and mobile device support

You can find information about supported browsers and mobile device support in release notes. Release notes are available on this website: <https://engagementcenter.silkroad.com>.

## Supported languages

You can find information about supported languages in the release notes. Release notes are available in the SilkRoad Engagement Center: <https://engagementcenter.silkroad.com>.

## Technical support

For technical assistance for any of our solutions, contact our support staff at:





Email: ***support@silkroad.com***

Web: ***https://engagementcenter.silkroad.com***

# Getting started

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## Logging in

1. Navigate to [https://humanasset.net/\(your company name\)/](https://humanasset.net/(your company name)/) OR [https://\(company name\)-ws.silkroad.com/\(company name\)](https://(company name)-ws.silkroad.com/(company name)).
2. Log in using your user name and password.

Your user name and password are provided by your company's SilkRoad Performance client administrator.

3. Click **Login**.

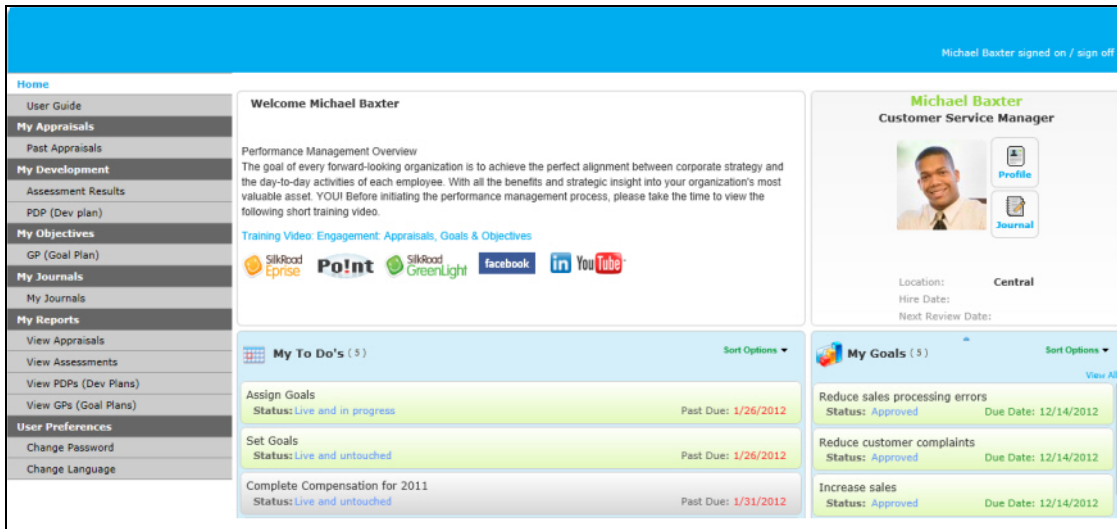
**Tip:** Select the **Remember user name** check box to auto fill your User ID and Password.

After logging in the Home Page displays. From your Home Page, you can use SilkRoad Performance as both an employee and an administrator.

## Home page

On your Home Page, you can manage, review and complete assigned tasks through your To Do list. Use the Sort Options feature to change sort order of the tasks. Tasks can be sorted by Due Date or Task.

Your Home Page may look different depending on which modules you are using and your available functionality.



## My To Do List

Your To Do list will include any tasks that you are responsible for completing along with the associated due date and status.

**Status** — Current status of the task. A task status provides additional details about the task.

**Due date** — Date the task is required to be complete. Due dates turn from green to red as tasks become overdue.

In addition, tasks are color coded and sorted by module to help you easily identify the various modules.

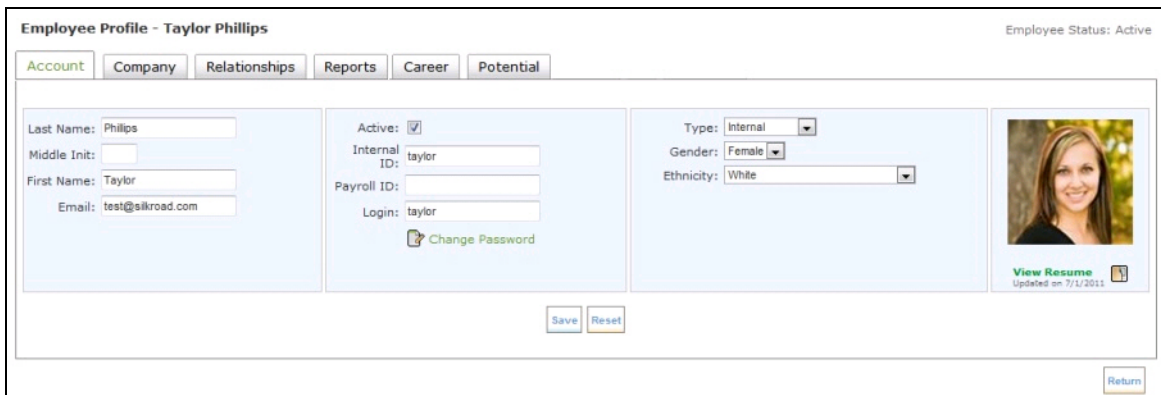
Module	Color
Appraisals	Gray
Assessments	Orange
Development Planning	Green
Performance Planning	Green

## About the navigation bar

The navigation bar is a menu of links, located on the left side of the page, which allows access to various SilkRoad Performance features. A user's role determines which features are accessible. As a client administrator, you have access to all of the functionality available for your company. Your navigation bar may not include all of the functionality in the following sample.



## Employee Profile



The Employee Profile provides a way to view employment details.



You can view your profile by clicking the [Profile](#) icon on the home page. Here, you can view the details and make changes on the Career tab only. In addition, by clicking the Reports tab,

employees and managers can view a chart of appraisal ratings for different processes tracked over time.

You can also upload a resume (maximum file size 512 KB) by clicking the Upload Resume icon located under the photo. If a file is greater than 512 KB, you can compress it in a zip file and then upload.

You can delete the resume at any time by clicking the Upload Resume icon and then clicking **Delete**.

The company administrator can make updates to profile information.

## Tabs

**Note:** Your tabs may differ slightly depending on whether your organization has set up User Defined Fields. Also, your permissions control what you can see.

Tab	Description
Account	The employee's first and last name, email, login and password appear in this tab.
Company	The company name, location, division, department and job, as well as the employment hire, start and review dates appear in this tab.
Relationships	The names of an employee's direct manager, HR representative, and coach appear in this tab.
Reports (if enabled)	Appraisal and assessment information, displayed in charts and grids, appear in this tab.
Career (if enabled)	The employee can provide career, job, language, and relocation information in this tab.
Potential	Succession planning data about employee's potential and risk of leaving appears in this tab.
User-Defined Field (UDF) set	If your organization has set up User Defined Fields (UDFs), the UDF set name appears on a tab.


## Employee Profile Report

The Employee Profile Report contains all the information found on the Employee Profile tabs for a particular employee. It is a printed version of the Employee Profile. Managers, administrators, and employees can print the report. The report is designed to show employee picture, job description, company specific data, and any custom fields available. The information that appears on the report is based on your permissions.

The report is not available in bulk. Managers who want reports for their employees must print a report, one at a time, for each employee.

A sample Employee Profile Report is shown below. Yours may look different based on your permissions.

**Taylor Phillips**  
 Customer Service Rep I  
 taylor.phillips@worldco.com



---

**Company**

<b>Location:</b>	West
<b>Division</b>	Corporate
<b>Department</b>	Customer Service

**Job description:**

Serves customers by providing product and service information; resolving product and service problems

<b>Original Hire Date:</b>	1/20/2002
<b>Current Hire Date:</b>	1/20/2002
<b>Job Start Date:</b>	1/20/2002
<b>Next Review Date:</b>	12/15/2011
<b>Termination Date:</b>	

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
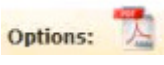
**Career**

**Languages**  
English, Spanish

**Career Jobs**  
Customer Service Manager, Operations Manager

**Relocation**  
North East, South East, Central

## Print a Employee Profile Report

1. Click  **Profile** .  
 The Employee Profile appears.
  2. Click  **Options:** .
  3. From the Open Employee Profile pdf pop-up window, click **Open with Adobe Reader**.  
 The report opens in Adobe Reader.
- Tip:** To save the report to your computer to print later, click **Save File**.
4. Click **File>Print**.
  5. From the Print window, click **Print**.

## File list UDF set

A file list UDF set is set up by an administrator in the SilkRoad Performance Admin portal. On the Employee Profile, a user can upload a maximum of five files into a file list UDF set. The maximum file size for each file is 512 KB.

Supported file types are:

- Microsoft Word Document (doc)
- Microsoft Word Open XML Document (docx)
- Adobe InDesign Document (indd)
- Log File (log)
- Outlook Mail Message (msg)
- OpenDocument Text Document (odt)
- Pages Document (pages)
- Picture File (pct)
- Portable Document Format File (pdf)
- Rich Text Format File (rtf)
- LaTeX Source Document (tex)
- Plain Text File (txt)
- WordPerfect Document (wpd)
- Microsoft Works Word Processor Document (wps)
- Works Spreadsheet (xlr)
- Excel Spreadsheet (xls)
- Microsoft Excel Open XML Spreadsheet (xlsx)
- Zip file (zip)

In addition to uploading, a user can edit and delete files if permissions allow.

## Upload a file into a file list UDF set



1. Click [Profile](#) .
2. Click the tab that is set up as a file list UDF set.

**Note:** A SilkRoad Performance administrator sets up a file list UDF set and grants users access and permission. Only users with the proper permissions can upload files.


3. Click **Add File**.

The Upload Document pop-up window appears.

4. Click **Browse**.
5. Find the file you want to upload and click **Open**.
6. In the Document Name box, type a description for the file.
7. Click **Upload**.


## Delete a file from a file list UDF set



1. Click **Profile**.
2. Click the tab that is set up as a file list UDF set.
3. For the file that you want to delete, click .
4. On the Confirm Deletion dialog box, click **Yes**.

## Edit a file on a file list UDF set



1. Click **Profile**.
2. Click the tab that is set up as a file list UDF set.
3. For the file that you want to edit, click .
4. Make changes as appropriate.
5. Click **Save**.

## Email notifications

Various system generated emails are sent to inform you of new tasks and keep you updated throughout the process. Emails contain the URL to log in and any additional information you may need to access the system. It is important to review SilkRoad Performance system emails because they may prompt you to perform specific tasks such as completing an appraisal form or reviewing an assessment form.

## Resetting your password

SilkRoad Performance uses a self-service password reset feature to reset passwords. With self-service reset, passwords are not sent to employees through email. Instead, employees can reset their password through secure email verification.

When the process is first launched, an email is sent to introduce the self-service password reset feature. The email includes a Self Service Reset link.

Follow these steps to set a password for the first time:

1. Click the link.
2. Enter a new password.



3. Confirm the new password.
4. Click **Submit**.

Use the Reset Password link if you have forgotten your password. Follow these steps to reset your password.

1. On the login screen, click **Reset your Password**.
2. In the Your UserID box, enter your user ID.
3. Click **Submit**.



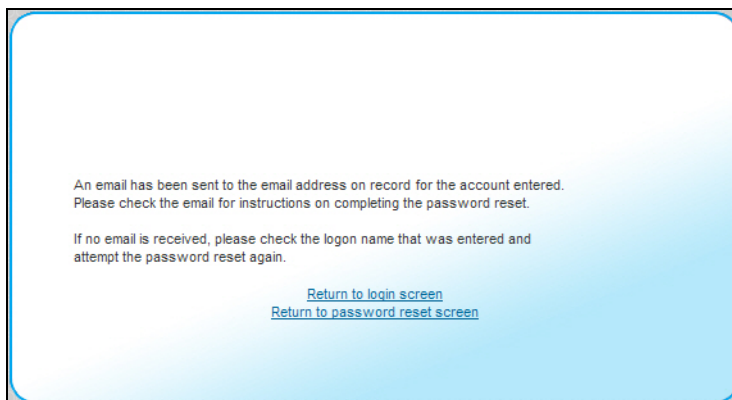
To Request a password reset, please enter your WingSpan login name.

Your UserID:

A system-generated email will provide you a link to reset your password. If you choose not to reset your password, you can log in to SilkRoad Performance using your existing password.

Your password must meet the password validation rules established by the Client Administrator. If the password contains any invalid characters, the password strength level displays Invalid. Upon submitting an invalid password, an error message is generated displaying the criteria that must be met.

4. After entering your password, click **Submit**.



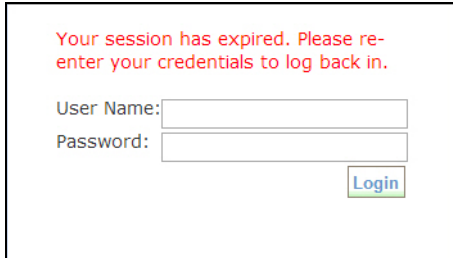
An email has been sent to the email address on record for the account entered. Please check the email for instructions on completing the password reset.

If no email is received, please check the logon name that was entered and attempt the password reset again.

[Return to login screen](#)  
[Return to password reset screen](#)

## Re-authentication

When a page times out and you have to re-authenticate, you must enter your user name and password on the Re-authentication pop-up.



Your session has expired. Please re-enter your credentials to log back in.

User Name:

Password:

## Changing language

**Note** The Change Language menu link is only available when localization is enabled.

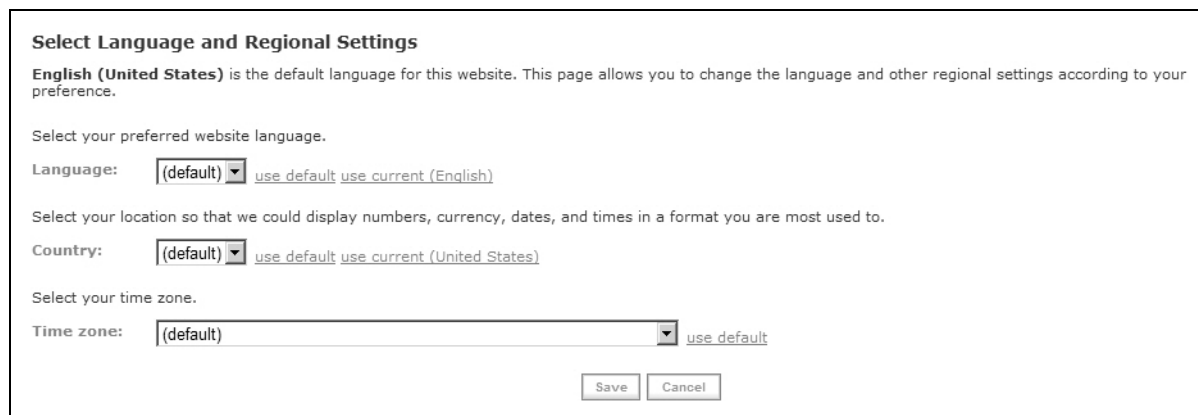
Upon initial login, the language and regional settings should be configured according to your preference. The language and regional settings define the preferred website language, the language used to generate emails, and for date and time formats.

A user's defined language and regional settings preference always takes precedence. If no match is found, SilkRoad Performance considers the user's browser setting. If no match is found, then the site default is used.

Follow these steps to manage your language and regional settings:

1. From the Navigation bar under User Preferences, select **Change Language**.

The Select Language and Regional Settings page appears.



**Select Language and Regional Settings**

**English (United States)** is the default language for this website. This page allows you to change the language and other regional settings according to your preference.

Select your preferred website language.

Language:  [use default](#) [use current \(English\)](#)

Select your location so that we could display numbers, currency, dates, and times in a format you are most used to.

Country:  [use default](#) [use current \(United States\)](#)

Select your time zone.

Time zone:  [use default](#)

2. Select the preferred website language, location and time zone using the drop-down fields.
3. Click **Save** to save the updated settings.

# Appraisals

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## Appraisals overview

An appraisal is a performance measurement tool. It provides managers and employees a way to measure skills and accomplishments in an accurate and uniform way. Performance appraisals are often used to help employees evaluate their work progress. Promotions, bonuses, and training needs are often based on information in an appraisal.

In SilkRoad Performance, you can create and manage year-end and interim employee appraisals. The information gathered is stored in a central repository, which provides managers with accurate, comprehensive, and timely data for employee reviews. Each step of the appraisal process is accompanied by a series of emails that notifies the recipient of next step in the appraisal process.

## The Appraisal process

Possible steps in the Appraisal process within SilkRoad Performance:

- Select Appraisal Reviewers (optional)
- Employee Writes Self-Appraisal
- Direct Manager Writes Appraisal of Employee
- Next Level Manager Reviews/Approves Appraisals
- Direct Manager Schedules and Manages Review Meeting
- Employee Acknowledges Meeting
- Meeting Reports Are Generated

### Select Appraisal Reviewers (Optional)

An optional step in the appraisal process is to select reviewers for the appraisal process.

*Select Reviewers* step allows feedback from a set of reviewers who are selected during the appraisal process. When added to the workflow, the new step creates a Select Reviewers task for the employee that appears in his workflow. Clicking the task takes the employee to the Select Reviewers page to add, remove, and submit reviewers. After the reviewers are submitted, the next step is launched. Often the Select Reviewers step is added as the second

step in the process. After the employee submits his self-appraisal, he is tasked with selecting reviewers to provide feedback. Optionally, managers have a step to approve the selected reviewers.

## **Employee Writes Self-Appraisal**

The first step in the appraisal process is generally an employee self-appraisal. A self-appraisal allows an employee to rate himself in the various competencies required for his job.

## **Direct Manager Writes Appraisal of Employee**

The direct manager is given the opportunity to complete an appraisal of his employee. The direct manager views the employee's completed self-appraisal while completing the appraisal.

## **Next Level Manager Reviews Appraisals**

The next level manager can review the appraisals completed by the employee and direct manager. The next level manager may also have the option to approve or reject the appraisal submitted by the employee's direct manager. If the approval function is added to this step, the appraisal must be approved by the next level manager before the process can move forward.

## **Manager Schedules and Manages Review Meeting**

After the next level manager reviews and approves the appraisal, the direct manager schedules a review meeting with the employee to discuss appraisal results. After the meeting is complete, the direct manager can include comments regarding the review meeting in the Journal area and then acknowledge that the meeting took place. After this is complete, the manager's responsibilities are complete for the assessment process.

## **Employee Acknowledges Meeting**

After reviewing the appraisal with his manager, the employee must acknowledge that the review meeting occurred and accept or reject the review meeting results. In the Journal section, the employee can enter any final comments regarding the appraisal.

## **Get Meeting Reports**

Reports containing the meeting and appraisal information are available to view via PDF or HTML.

## **Completing appraisals**




The following example is typical. However, because SilkRoad Performance is flexible your company's appraisal process may be different.


You have access to your Journal to view all entries you have entered to help you during the appraisal process. To access your Journal entries, click the Journal link in the Appraisal Details screen.

## Employee role

Follow these steps to complete your appraisal.

1. A system generated email is sent to notify you of your new task.
2. After you have logged in to the system, you will notice your new task on your To Do list.
3. By selecting the Write Self-Appraisal link in your To Do list, you are directed to the appraisal task that needs to be completed.
4. Access your appraisal by choosing Appraisal Tasks from the Navigation bar.
5. Click on the Write Self-Appraisal link.
6. The appraisal form contains important instructions that you need to read before completing the appraisal form.

**Options:**   

Appraisal Details  Show/Hide Appraisal Details

**Write Appraisal**

Appraisal For	Job Title	Period	Due Date
Phillips, Taylor	Customer Service Rep II	Y2012	12/15/2012

**Instructions**

Performance appraisals are to provide feedback, clarify expectations, and establish goals for future development. As you complete this form, please keep in mind that this appraisal should cover performance over the entire evaluation period - not just recent events.

Also remember that the most effective performance appraisals are supported with specific examples. Whenever possible, provide details or specific situations to back up or illustrate a comment or rating.


Write Appraisal for Self

**Customer Service Representative - Appraisal**

**Core Competencies (15%)**

**Initiative \***

Takes initiative to go beyond the requirements of the job

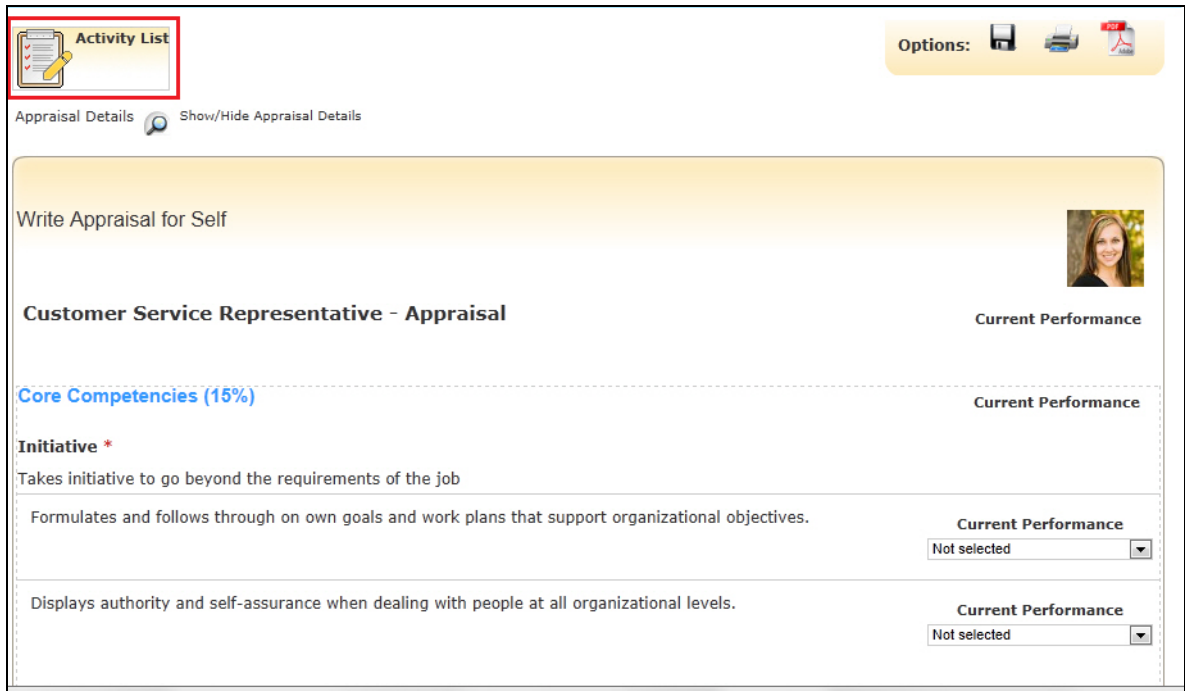


Current Performance




Current Performance


7. An appraisal can have an Activity List that you create during the appraisal process. At the end of the appraisal process, the activities in the list are added to your Development Plan

8. If an Activity List is available, click on the Activity List at the top of the page to add activities to the list.



Activity List

Options:   

Appraisal Details  Show/Hide Appraisal Details

Write Appraisal for Self

**Customer Service Representative - Appraisal**

Current Performance

**Core Competencies (15%)**

Current Performance

**Initiative \***

Takes initiative to go beyond the requirements of the job

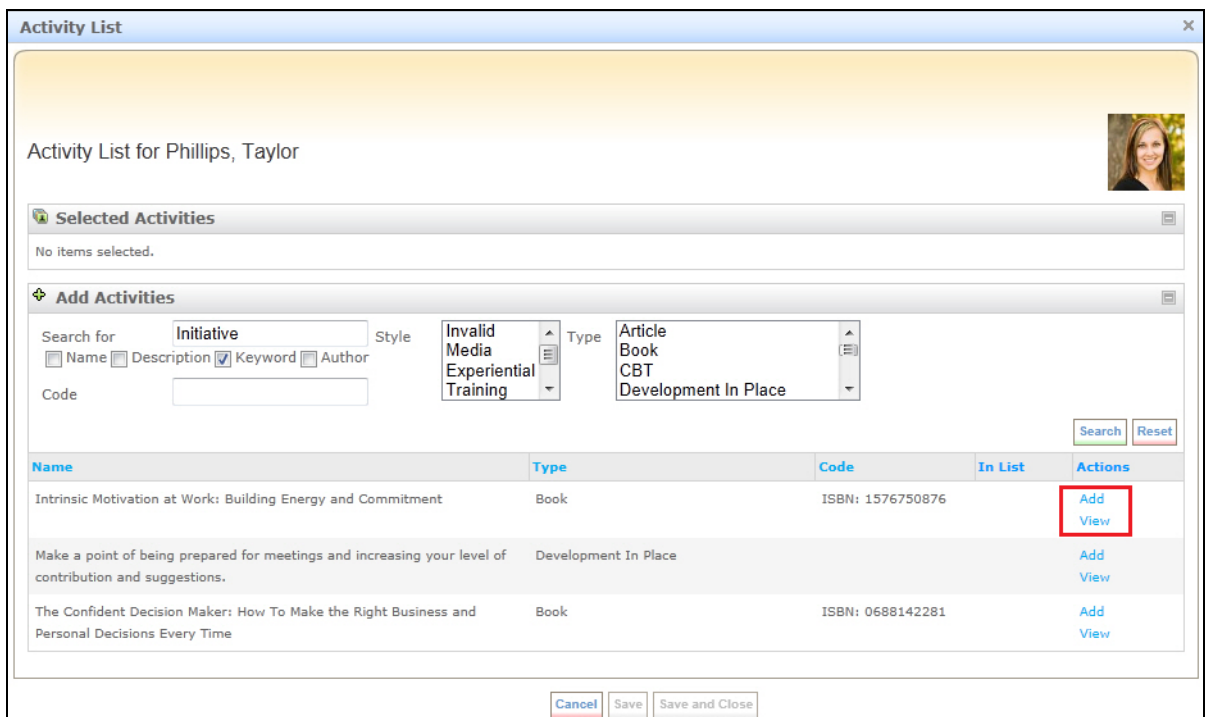
Formulates and follows through on own goals and work plans that support organizational objectives.

Current Performance  
Not selected

Displays authority and self-assurance when dealing with people at all organizational levels.

Current Performance  
Not selected

9. Add activities by clicking the Add Activities section and searching for activities using the filter fields.



Activity List

Activity List for Phillips, Taylor

**Selected Activities**

No items selected.

**Add Activities**

Search for  Style ☐ Name ☐ Description ☒ Keyword ☐ Author

Code

Invalid Media  
Experiential  
Training

Type   
Book  
CBT  
Development In Place

Name	Type	Code	In List	Actions
Intrinsic Motivation at Work: Building Energy and Commitment	Book	ISBN: 1576750876		<a href="#">Add</a> <a href="#">View</a>
Make a point of being prepared for meetings and increasing your level of contribution and suggestions.	Development In Place			<a href="#">Add</a> <a href="#">View</a>
The Confident Decision Maker: How To Make the Right Business and Personal Decisions Every Time	Book	ISBN: 0688142281		<a href="#">Add</a> <a href="#">View</a>

10. Click the View link to view an activity or click the Add link to add it to the list associated with the appraisal.

11. Close the Activity List by clicking "Save and Close".
12. Complete the form in its entirety, making sure to answer all required questions. It is important to remember that you must complete all required information to submit.
13. Click one of the following buttons:

**Cancel** — To close your appraisal without saving changes.

**Preview** — To view, save or print the Appraisal form in PDF or HTML format at any time during the scoring process. You can do this by clicking **Preview**. When you have finished viewing the form, you will need to click **Finished** to return to the Appraisal form.

**Calculate Rollup Scores** — To calculate the overall score at any point during the process of scoring the appraisal. This feature allows you to view the overall score without saving the ratings you have selected.

**Save** — To save your work on the appraisal form. You may access the appraisal form at a later time.

**Submit** — To save your work and submit the completed appraisal. It is important to remember that you cannot submit your appraisal without completing all of the required questions. You will receive a confirmation pop-up indicating that the save and submission is complete.



## Manager role

Follow these steps to complete an appraisal.

1. A system generated email is sent to notify you of your new task.
2. After you have logged in to the system, you will notice your new task on your To Do list.
3. By selecting the Manager Writes Appraisal link in your To Do list, you are directed to the appraisal task that needs to be completed.
4. Access the appraisal by choosing Appraisal Tasks from the Navigation bar.
5. Click on the Manager Writes Appraisal link.

The appraisal form contains important instructions that you need to read before completing the appraisal form.

6. Complete the form in its entirety, making sure to answer all required questions. As a direct manager, you will be able to view the employee's self-appraisal as you complete an appraisal on his or her behalf.

It is important to remember that you must complete all required information in order to Submit.

Core Competencies							
Name							
Thompson, Jane	2.94						
Manager, Bill							
Technical Expertise							
Name							
Thompson, Jane	3.00						
Manager, Bill							
Develops a basic understanding of the operations, processes, and other aspects of the business and how they interrelate.	<table border="1"> <thead> <tr> <th>Name</th> <th></th> </tr> </thead> <tbody> <tr> <td>Thompson, Jane</td> <td>4- Very Competent</td> </tr> <tr> <td>Manager Bill</td> <td>Not selected</td> </tr> </tbody> </table>	Name		Thompson, Jane	4- Very Competent	Manager Bill	Not selected
Name							
Thompson, Jane	4- Very Competent						
Manager Bill	Not selected						

- If an Activity List is available, the Manager can also optionally add activities to the Activity List.
- Click one of the following buttons:

**Cancel** — To close the appraisal without saving changes.

**Preview** — To view, save or print the Appraisal form in PDF or HTML format at any time during the scoring process. You can do this by clicking **Preview**. When you have finished viewing the form, you will need to click on Finished to take you back to the Appraisal form.

**Calculate Rollup Scores** — To calculate the overall score at any point during the process of scoring the appraisal. This feature allows you to view the overall score without saving the ratings you have selected

**Save** — To save your work on the appraisal form. You may access the appraisal at a later time. Rollup scores are automatically calculated when you save.

**Submit** — To save your work and submit the completed appraisal. It is important to remember that you cannot submit your appraisal without completing ALL of the required questions. You will receive a confirmation pop-up indicating that your save and submission are complete.

Cancel	Preview	Calculate Rollup Scores	Save	Submit
--------	---------	-------------------------	------	--------

## Next Level Manager role

Follow these steps to review the appraisal.

- A system generated email is sent to notify you of your new task.
- After you have logged in to the system, you will notice your new task on your To Do list.

By selecting the Review Appraisal link in your To Do list, you will be directed to the appraisal task that needs to be completed.



3. Select Appraisal Tasks from the Navigation bar.
4. Click on the Review Appraisals link.

The appraisal form contains important instructions that you need to read before completing the appraisal form.

5. As the next level manager, you can review both the employee and direct manager's comments and performance rating.

Core Competencies																					
	<table border="1"> <thead> <tr> <th>Name</th> <th></th> </tr> </thead> <tbody> <tr> <td>Thompson, Jane</td> <td>2.94</td> </tr> <tr> <td>Manager, Bill</td> <td>2.93</td> </tr> </tbody> </table>	Name		Thompson, Jane	2.94	Manager, Bill	2.93														
Name																					
Thompson, Jane	2.94																				
Manager, Bill	2.93																				
<hr/>																					
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Manager, Bill	5- Exemplary																				

6. If an Activity List is available, the next level manager can also optionally review the activities in the Activity List.
7. Once you are finished reviewing the appraisal and have added a Journal entry (optional), you can choose to Approve or Request a Rewrite.

Journal		
<div>I request a rewrite</div>		
Author	Timestamp	Entry
Empty		

8. By requesting a rewrite, a system generated email is sent to the manager prompting him or her to rewrite the appraisal. Once complete, you will be able to read the revised appraisal and approve the changes.
9. To complete your review, click one of the following buttons:

**Cancel** — To close the appraisal without saving changes.

**Approve** — To approve the appraisal and continue the appraisal process.

**Request Rewrite** — To request a rewrite of the appraisal by the manager. You are able to review and approve the rewrite.

Cancel	Approve	Request Rewrite
--------	---------	-----------------

## Additional information

The following provides additional important information about completing an appraisal.

## Displaying previous appraisal data




If your administrator enabled the display previous appraisal data feature, you can view and copy comments and ratings from previous reviews while completing an end-of-year review. This feature makes it easy to view and compare previous appraisal forms when working on current appraisals.

In the following example, note that Taylor is working on her end-of-year appraisal. She can see the comments and ratings she gave herself in her mid-year appraisal. She can also see the comments and ratings that her manager gave her.

Initiative *		
Takes initiative to go beyond the requirements of the job		
Formulates and follows through on own goals and work plans that support organizational objectives.	Name	Current Performance
	Phillips, Taylor (Mid Year Appraisal)	3 - Satisfied Most Expectations
	Baxter, Michael (Mid Year Appraisal)	3 - Satisfied Most Expectations
	Phillips, Taylor	Not selected
Displays authority and self-assurance when dealing with people at all organizational levels.		
	Name	Current Performance
	Phillips, Taylor (Mid Year Appraisal)	3 - Satisfied Most Expectations
	Baxter, Michael (Mid Year Appraisal)	3 - Satisfied Most Expectations
	Phillips, Taylor	Not selected
Phillips, Taylor (Mid Year Appraisal)	<div>Enter Comment</div> <div>I believe I have shown a tremendous amount of initiative this year by taking on 3 major projects.</div>	
Baxter, Michael (Mid Year Appraisal)	<div>Enter Comment</div> <div>Taylor had indeed shown a high level of initiative. However, progress to date on these three projects is not on track and my fear is she has bitten off more than she can chew. We will continue to monitor her progress.</div>	
Phillips, Taylor	<div>Enter Comment</div> <div></div>	

You can choose to hide comments and ratings on the form from other reviewers. Using the Display All Authors check box, you can toggle off to hide comments and ratings or toggle on to show them.

Taylor Phillips signed on / sign off

Options:   

Display All Authors: ☒

## Rating scale

The appraisal form uses a rating scale to rate behavior and competency for each task in the appraisal. Each appraisal has a corresponding rating scale and a description to help you identify the meaning of each score.

Your company's rating scale may be different from the following example.

**Rating Scale Descriptions**  
  
**RATING SCALE**  
Place the corresponding rating in the box provided which best describes performance.  
  
5- Exemplary- Performance is clearly distinguished; reflects superior effort and exceptional results and is evident by others.  
4- Very Competent- Performance consistently meets and often significantly exceeds established expectations. Performance reflects a high degree of initiative and high quality results.  
3- Competent- Performance consistently meets all job standards and expectations. Solid, all-around performance.  
2- Needs Development- Performance may meet some, but does not consistently meet established job standards. Individual requires counsel, guidance and supervision. Performance improvement is necessary to demonstrate initiative and to attain competency in key areas of current position. Action plan for improvement is mandatory.  
1- Must be Improved- Performance in key areas is at an unacceptable level. Performance improvement must be achieved to justify retention in position. Action plan for improvement is mandatory.

## Comments


Comment sections are used throughout the form to allow you to add additional information to support the rating. Your form may include general comment boxes that allow you to enter general comments or copy and paste from documents and email.

Enter Comment
Move Comment Box

## Spell check

Another feature in SilkRoad Performance is spell check. If your administrator enables the spell check functionality, you can click on the **abc** icon to automatically check for spelling errors.

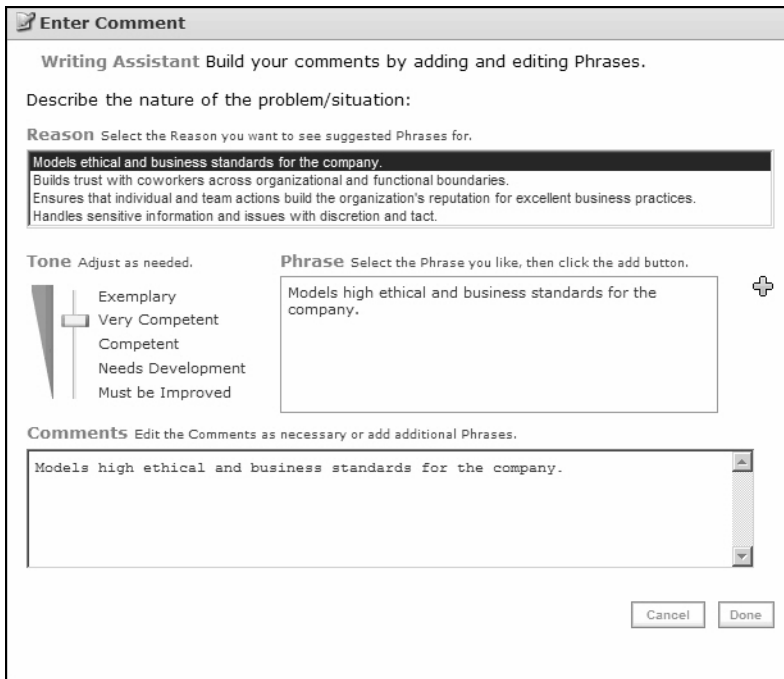
Enter Comment



Cancel Done

## Writing Assistant

If your administrator enables the Writing Assistant option, you can use it to build your comments. With Writing Assistant, you can access pre-existing phrases and edit them to meet your needs. You can also add any phrases that you need.



**Enter Comment**

**Writing Assistant** Build your comments by adding and editing Phrases.

Describe the nature of the problem/situation:

**Reason** Select the Reason you want to see suggested Phrases for.

Models ethical and business standards for the company.  
Builds trust with coworkers across organizational and functional boundaries.  
Ensures that individual and team actions build the organization's reputation for excellent business practices.  
Handles sensitive information and issues with discretion and tact.

**Tone** Adjust as needed.

Exemplary  
Very Competent  
Competent  
Needs Development  
Must be Improved

**Phrase** Select the Phrase you like, then click the add button.

Models high ethical and business standards for the company.

**Comments** Edit the Comments as necessary or add additional Phrases.

Models high ethical and business standards for the company.

Cancel Done

## Saving, printing, or creating a PDF

In addition, you have the option to save, print or create a PDF by selecting from the Options bar at the top of your assessment.



When you select to create a PDF, your final version of the appraisal eliminates all of the instructions and rating information.


Depending on the configuration of your system, you may have the option to check compliance and/or use spell check. When enabled, the icons are displayed in the comment box.

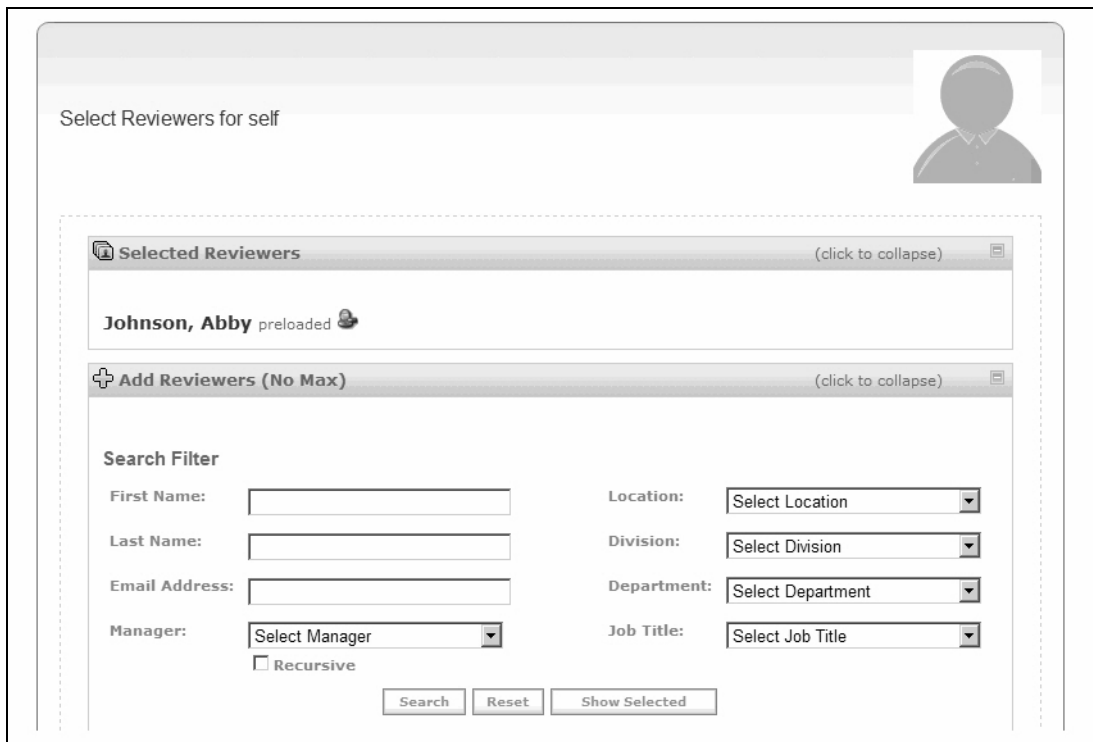
## Selecting reviewers

### Employee role

Follow these steps to select reviewers.


1. A system generated email is sent to notify you of your new task.
2. After you have logged in to the system, you will notice your new task on your To Do list.
3. Access your task by choosing Appraisal Tasks from the Navigation bar.

4. Click on the Select Reviewers for self link.
5. Selected, preloaded reviewers are listed. Depending on the configuration of the task, you may be able to remove preloaded reviewers. If the option exists, you will see an . To remove the preloaded reviewer, click on the icon.
6. To add reviewers, click on the Add Reviewers (No Max) icon. If there are a maximum number of reviewers that can be selected, it is noted.
7. Perform a search using the search filters. If you want to view all reviewers that can be selected, reset the search filter and click **Search**. The search results display below.



Select Reviewers for self

**Selected Reviewers** (click to collapse)

Johnson, Abby preloaded 

**+ Add Reviewers (No Max)** (click to collapse)

**Search Filter**

First Name:

Last Name:

Email Address:

Manager:

☐ Recursive

Location:

Division:

Department:

Job Title:

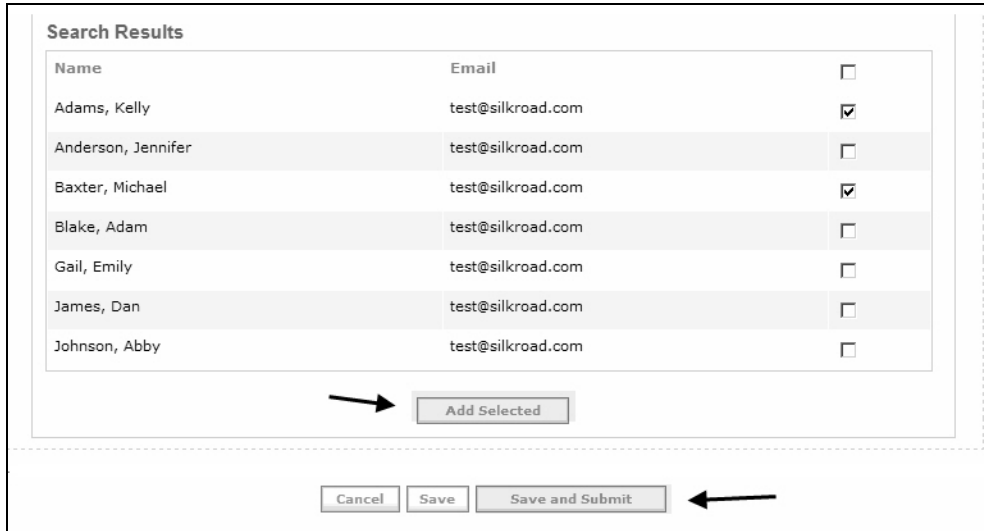
8. Place a check mark next to the reviewers you want to add. To select all reviewers listed in the search results, click on the top most checkbox. This will select all listed reviewers.

If you have a long list, you may want to view your list before saving and submitting.

To view your selected reviewer list, click **Show Selected**.

9. Click **Add Selected** to add the reviewers.

10. After your list is complete, click **Save and Submit**. Depending on the workflow configuration, the reviewer list may require approval by your manager.




Name	Email	
Adams, Kelly	test@silkrroad.com	<input checked="" type="checkbox"/>
Anderson, Jennifer	test@silkrroad.com	<input type="checkbox"/>
Baxter, Michael	test@silkrroad.com	<input checked="" type="checkbox"/>
Blake, Adam	test@silkrroad.com	<input type="checkbox"/>
Gail, Emily	test@silkrroad.com	<input type="checkbox"/>
James, Dan	test@silkrroad.com	<input type="checkbox"/>
Johnson, Abby	test@silkrroad.com	<input type="checkbox"/>

Buttons: Cancel, Save, Save and Submit

## Manager role

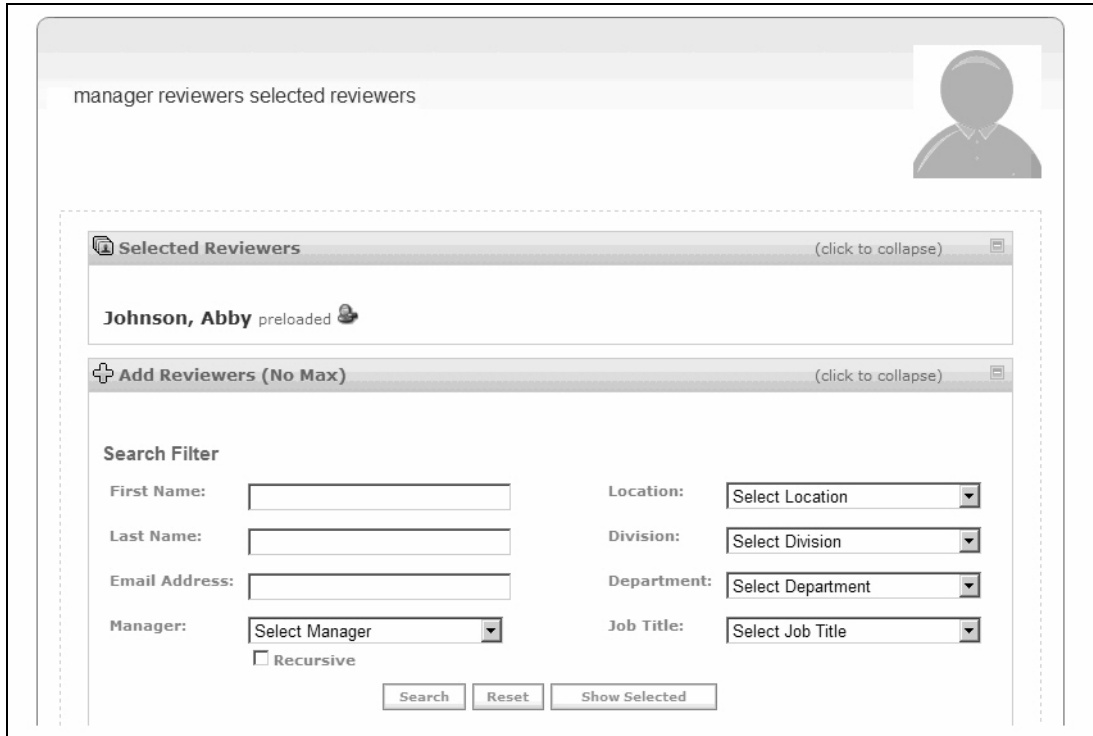
Follow these steps to approve selected reviewers.

1. A system generated email is sent to notify you of your new task.
2. After you have logged in to the system, you will notice your new task on your To Do list.
3. Access your task by choosing Appraisal Tasks from the Navigation bar.
4. Click on the Manager Reviews Selected Reviewers link.
5. The employee's selected reviewers are listed. Review the list and make changes as necessary.

Click on the  employee icon to remove a reviewer.

6. To add reviewers, click on the Add Reviewers (No Max) icon. If there are a maximum number of reviewers that can be selected, it is noted.

7. Perform a search using the search filters. If you want to view all reviewers that can be selected, reset the search filter and click **Search**. The search results display below.



The screenshot displays a web interface for managing reviewers. At the top, there is a header bar with the text "manager reviewers selected reviewers" and a user profile icon. Below this, there are two main sections: "Selected Reviewers" and "Add Reviewers (No Max)".

The "Selected Reviewers" section shows a list of reviewers, with "Johnson, Abby" listed as "preloaded".

The "Add Reviewers (No Max)" section contains a "Search Filter" form with the following fields:

- First Name:
- Last Name:
- Email Address:
- Manager:
- Location:
- Division:
- Department:
- Job Title:

There is also a checkbox labeled "Recursive" and three buttons at the bottom: "Search", "Reset", and "Show Selected".

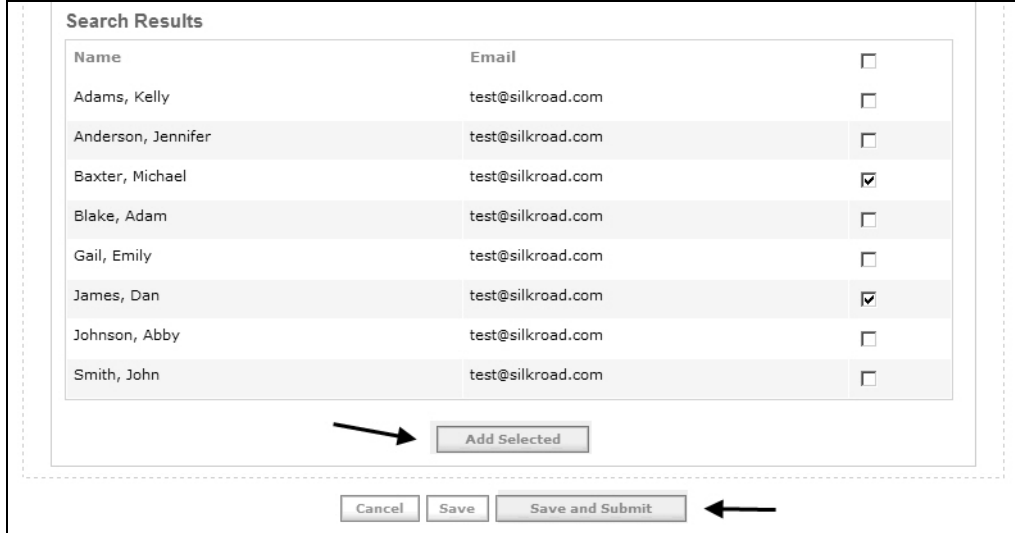
8. Place a check mark next to the reviewers you wish to add. To select all reviewers listed in the search results, click on the top most checkbox. This will select all listed reviewers.

If you have a long list you may want to view your list before saving and submitting.

To view your selected reviewer list click **Show Selected**.

9. Click **Add Selected** to add the reviewers.

10. After your list is complete, click **Save and Submit**.



Name	Email	
Adams, Kelly	test@silkroad.com	<input type="checkbox"/>
Anderson, Jennifer	test@silkroad.com	<input type="checkbox"/>
Baxter, Michael	test@silkroad.com	<input checked="" type="checkbox"/>
Blake, Adam	test@silkroad.com	<input type="checkbox"/>
Gail, Emily	test@silkroad.com	<input type="checkbox"/>
James, Dan	test@silkroad.com	<input checked="" type="checkbox"/>
Johnson, Abby	test@silkroad.com	<input type="checkbox"/>
Smith, John	test@silkroad.com	<input type="checkbox"/>

Buttons: Cancel, Save, Save and Submit

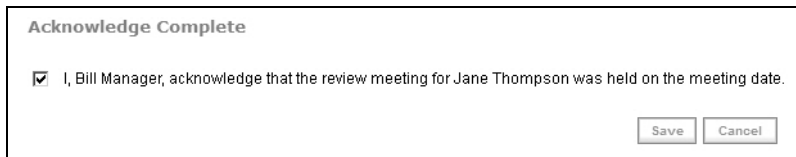
## Reviewing appraisals

Once the appraisals are completed and approved, you can track and document the review process using Manage Review Meeting.

### Manager role

Follow these steps to track and document the appraisal process.

1. A system generated email is sent to notify you of your new task.
2. After you have logged in to the system, you will notice your new task on your To Do list.
3. Once the appraisals are complete and approved, you must schedule a review meeting to discuss the appraisal results with your employee.
4. After the review is complete, you must complete a Review Meeting acknowledgement.
5. Click on the Manage Review Meeting link or click Appraisal Tasks.
6. Sign-off on the Review Meeting by entering the meeting date and check the "Acknowledge Complete" box in the Manage Review Meeting task and click Save.



**Acknowledge Complete**

☒ I, Bill Manager, acknowledge that the review meeting for Jane Thompson was held on the meeting date.

Buttons: Save, Cancel



- You are prompted to complete the task and submit the Review Meeting as Complete by clicking Yes.

Confirm Review Meeting Complete

The review meeting data has been saved. Do you wish to submit the review meeting as complete?

Yes No Exit

- System generated emails are sent to both the direct manager and the employee. The direct manager is sent an email acknowledgment for the completion of the Appraisal Review and the employee is sent an email notifying him or her of a new task.

## Employee role

Follow these steps to acknowledge an Appraisal Review.

- A system generated email is sent to notify you of your new task.
- After you have logged in to the system, you will notice your new task on your To Do list.
- Access the sign-off by clicking the Acknowledge Meeting link in your To Do list or access the Acknowledge Meeting task from the Appraisal Task screen.

**Journal**

Michael Baxter did not participate in my review. Instead, the review was performed by my new manager.

Author	Timestamp	Entry
Empty		

**Acknowledge Complete**

I, Taylor Phillips, acknowledge that:

☐ The review meeting for Taylor Phillips was held on the meeting date.

☒ The information provided above is not correct. (Please enter corrections in Journal).

Save Cancel

- The meeting acknowledgment allows the employee provide comments in the Journal section.
- The employee can do one of the following:
  - Accept and acknowledge the meeting was held
  - Disagree with how the meeting was held.

An appraisal disagreement notification email is sent to HR (or other SilkRoad Performance role depending on how it was set up) along with the comment in the Journal box.

- To submit the Review Meeting Acknowledgment, click **Save**.

## Review completed appraisal reports

Following the completion of the Appraisal review, reports are made available for both the Employee and Direct Manager.

Follow these steps to view completed appraisals.

1. A system generated email is sent to notify you of your new task.
2. From the Navigation bar under Reports, select Appraisal.
3. Select the Appraisal you wish to review by clicking the Reports link.

My Appraisal Reports

Appraisal Period	Actions
Fiscal 2008	<a href="#">Reports</a>

My Team Member Appraisal Reports

Appraisal For	Appraisal Period	Actions

Appraisals Written for Others

Appraisal For	Appraisal Period	Actions
Smith, John	Fiscal 2008	<a href="#">Reports</a>

## Appraisal status

Managers have the ability to view the status of all appraisals that have been launched for any of their employees using the appraisal status functionality from the Navigation bar. Here, managers can use the search filters option to view appraisals by employee name, department, division, location, date, job title, status or role.

Follow these steps to view an appraisal status.

1. From the Navigation bar, select **Appraisal Status**.
2. Select an Appraisal Group from the drop-down menu. To view all Appraisal Groups choose All Launches from the drop-down menu.
3. Enter your search criteria and select **Search**. You may choose multiple search criteria.

To reset your search criteria, click **Reset**.

4. Your Search results are displayed at the bottom of the screen. Results include employee name, completion status and appraisal launch details. By clicking on the appraisal link you can view the appraisal workflow for your employee. Click **Return to List** to return to the Appraisal Status screen.

You may print your results by clicking on the printer icon located at the top right of your screen.

**Appraisal Status**

Choose an Appraisal Group: All Launches

**All Launches**

Search Filter

Last Name:

Department:

Division:

Location:

Date Interval: Y2016

Job Title:

Status:

Role:

[Search](#) [Reset](#)

**Results List**

[Employee Name](#) [Completion Status](#) [Appraisal Launch Details](#)

The Appraisal Workflow allows you to view appraisals and send reminders.

**Appraisal Status**

[Return to List](#)

**All Launches**

**Thompson, Jane Appraisal Workflow Steps**

100% complete

Step	Task	Reviewer	Reviewer Role	Appraisal Profile	Approval Cycle	Status	Due Date	Actions
1	Employee Write Appraisal	Thompson, Jane	Self	Product Manager		Live and completed	12/31/2008	<a href="#">View</a>
2	Manager Writes Appraisal	Manager, Dan	Manager	Product Manager		Live and completed	12/31/2008	<a href="#">View</a>
3	Manager Meeting	Manager, Dan	Manager			Live and completed	12/31/2008	<a href="#">View</a>
4	Acknowledge Meeting	Thompson, Jane	Self			Live and completed	12/31/2008	<a href="#">View</a>

[Remind](#)  
[Selected](#)

[Return to List](#)

# Performance Planning—Goals

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## Performance planning overview

Performance planning allows employees to create and manage specific goals throughout a plan period.

## Create goals

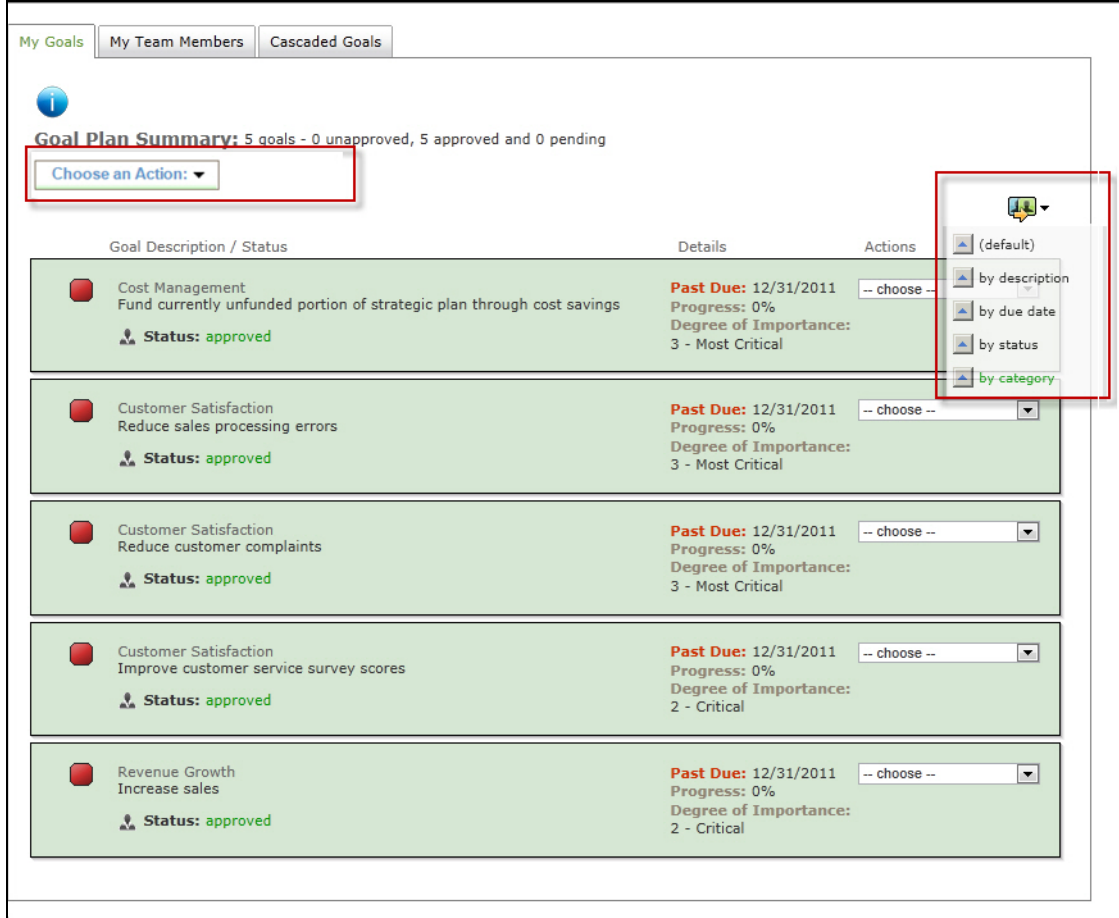
Follow these steps to create a goal.

### Employee role

1. A system generated email is sent to notify you of your new task.
2. After you have logged in to the system, you will notice your new task on your To Do list.













### 3. Choose **Set Goals**.



**My Goals** | My Team Members | Cascaded Goals

**Goal Plan Summary:** 5 goals - 0 unapproved, 5 approved and 0 pending

Choose an Action: ▼

Goal Description / Status	Details	Actions
 <b>Cost Management</b> Fund currently unfunded portion of strategic plan through cost savings  <b>Status:</b> approved	<b>Past Due:</b> 12/31/2011 <b>Progress:</b> 0% <b>Degree of Importance:</b> 3 - Most Critical	-- choose -- ▼
 <b>Customer Satisfaction</b> Reduce sales processing errors  <b>Status:</b> approved	<b>Past Due:</b> 12/31/2011 <b>Progress:</b> 0% <b>Degree of Importance:</b> 3 - Most Critical	-- choose -- ▼
 <b>Customer Satisfaction</b> Reduce customer complaints  <b>Status:</b> approved	<b>Past Due:</b> 12/31/2011 <b>Progress:</b> 0% <b>Degree of Importance:</b> 3 - Most Critical	-- choose -- ▼
 <b>Customer Satisfaction</b> Improve customer service survey scores  <b>Status:</b> approved	<b>Past Due:</b> 12/31/2011 <b>Progress:</b> 0% <b>Degree of Importance:</b> 2 - Critical	-- choose -- ▼
 <b>Revenue Growth</b> Increase sales  <b>Status:</b> approved	<b>Past Due:</b> 12/31/2011 <b>Progress:</b> 0% <b>Degree of Importance:</b> 2 - Critical	-- choose -- ▼

4. Select Create a New Goal from the Choose an Action drop-down field.

5. Create a new goal by filling in the necessary information:

Select a category using the drop-down field.


Enter a description of your goal in the text box.

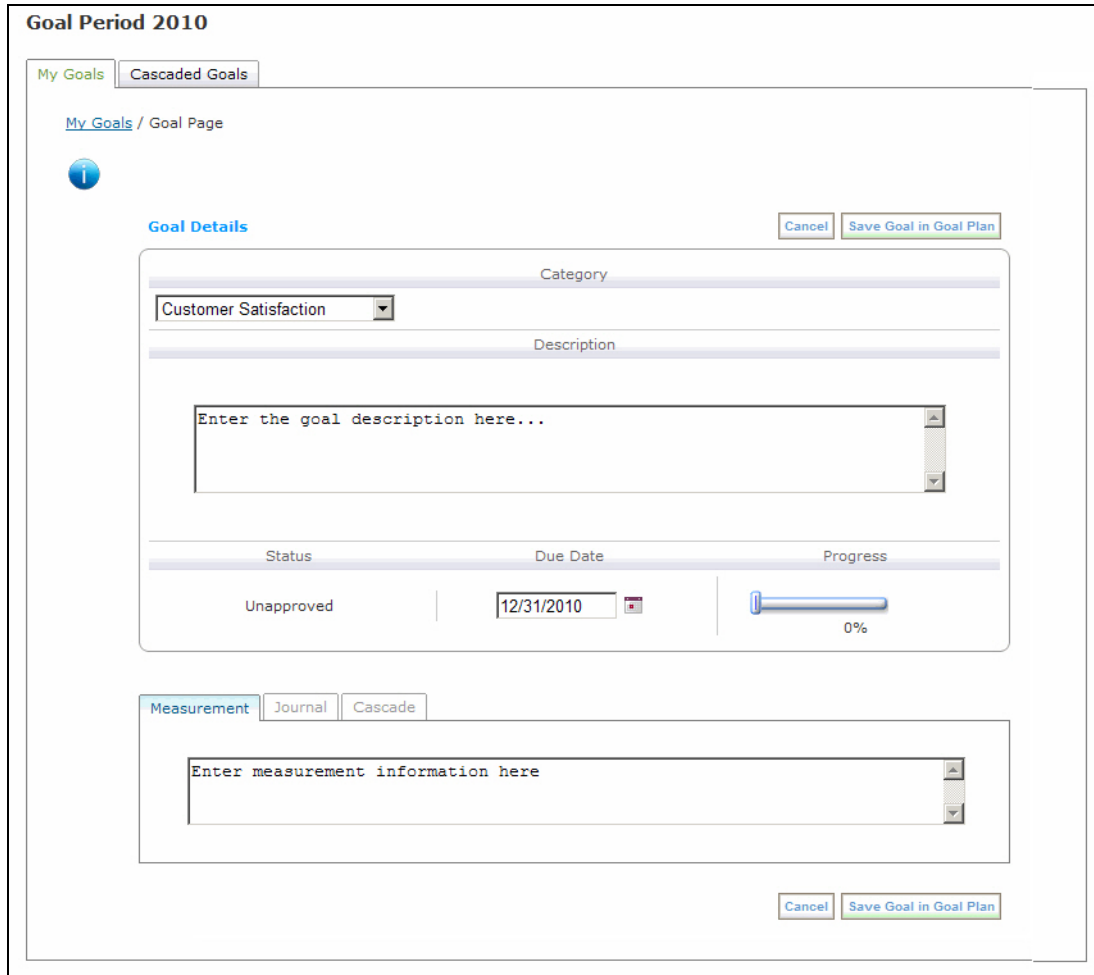
Enter a due date for completion of the goal by entering a date or using the calendar icon.

Select the degree of importance for the goal using the drop-down field.

Enter a measurement statement.

Optionally update the Journal and Score features if available.

Click on the  information icon to view instructions and additional information.



6. Click **Save Goal in Goal Plan** to save the goal to your Plan.
7. Follow the same process to add additional Goals to your Plan.

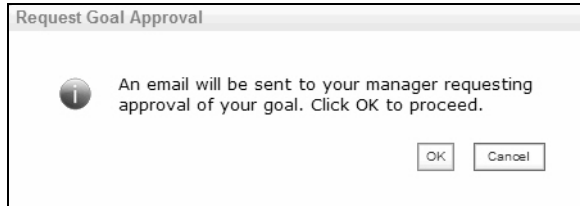
The Actions option allows you to delete Goals and request approval of your Goal Plan.

8. Once all of your information in your Goal Plan is complete you may request approval of an entire plan or each individual goal, depending on how your company chooses to approve Goal Plans.

To request approval of an entire goal plan select Request Plan Approval from (manager's name) from the Choose an Action drop-down field.

To request approval of individual goals select Request Approval from the drop-down menu under Actions.

9. Click **OK** to continue the process and request approval of your goal(s).




10. An email notification is sent to your manager and a confirmation email is sent to you indicating that you have completed your task of creating a Goal Plan.

You can follow the Approval of your Goal Plan on your Home page under My Goals.

11. If your company approves goals individually, each goal, upon approval, is updated to the status of Approved.
12. If your manager rejects your Goal Plan or one or more goals (if your goals are individually approved), you will be able to view any comments made by your manager, update your goal(s) and resubmit for approval.

At any time you may update or add to your Goal Plan.

13. Click  to sort goals by descriptions, due date or status.

## Approve a goal plan

Follow these steps to approve a goal plan.

### Manager role

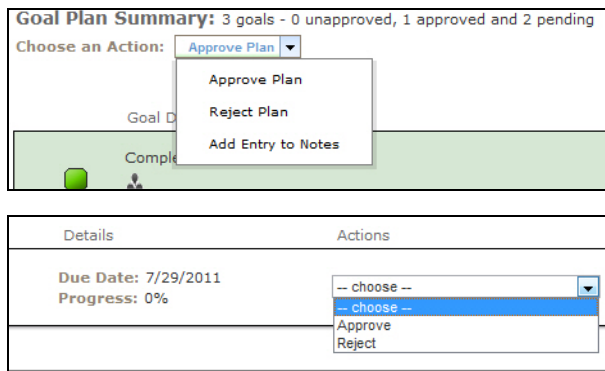
1. A system generated email is sent to notify you of your new task.
2. After you have logged in to the system, you will notice your new task on your To Do list.
3. From your To Do list, choose **Review Plan**.



4. Click on the Goal Description to view details about the Goal. In addition, you can click on the Journal tab to add a journal entry.
5. After you have finished reviewing the Goal Plan, depending on which type of plan review your company chooses, you can approve or reject the entire Goal Plan or approve or reject individual goals.

**Note:** If you reject a goal submitted for approval, you must enter a reason. The reason for the goal rejection is documented in the Journal tab in the Previous Entries box and a goal rejection email is sent to the employee.

- To approve an entire Goal Plan, select Approve Plan from the Choose an Action drop-down field. To approve or reject individual goals, use drop-down field under the Actions column.



- Upon approval, the employee is notified that his or her plan is approved and he or she may begin working on the individual goals.

Click on the **select another plan** button to view additional Goal Plans. Select the goal plan from a drop-down list.

## Assign goals

As a manager you can assign goals to your employees. To suggest or prescribe goals, your client administrator must have enabled the functionality during the goal plan configuration.

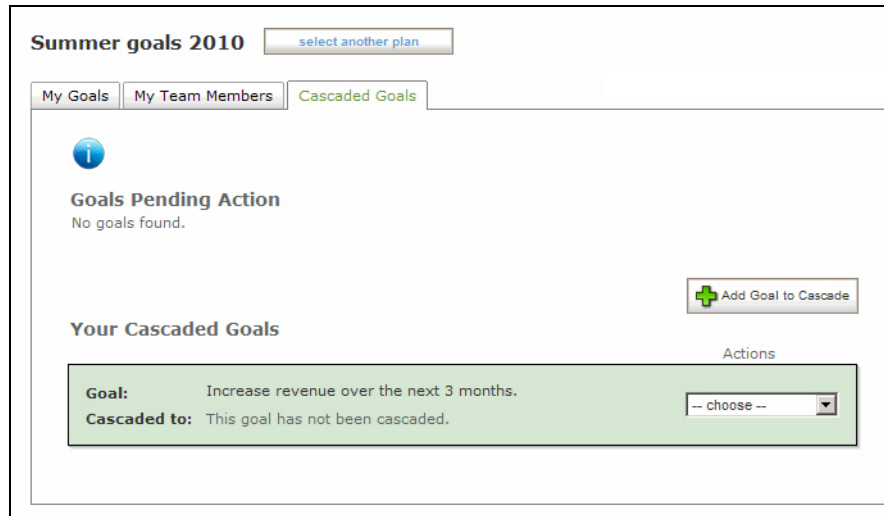
- From the Navigation bar under Performance Planning, select My Goals.
- Click on the Cascaded Goals tab. Here you can view the available cascaded goals.

You have the option to:

- Add Goal to Cascade.** This allows you to add additional goals and save the goal to cascade. When you add a new goal, you have the option to set the goal type to suggested or prescribed. Suggested goals can be accepted or rejected by your employees. Prescribed goals are mandatory. Once you have added a Goal to the Cascade you must click on **Edit Cascade** to assign it to your employee(s). Note: If the plan rule allows for only one cascade option (Suggested or Prescribed), the pop-up menu is not displayed.
- Delete.** Allows you to delete the goal from your goal plan. You will need to confirm the deletion.
- Edit a Cascade.** This allows you to add or remove employee names from the cascade list.
- Edit a prescribed goal:** Managers can make changes to a goal that is assigned to multiple employees.



- **Copy Goal to Cascade.** This allows you to copy the goal to a selected plan. A pop-up list of available goal plans displays.




## Accept all pending goals

As an employee, you can easily accept all pending goals assigned to you.

1. From the Navigation bar under Performance Planning, select **My Goals**.
2. Click the Cascaded Goals tab.

Pending goals are listed in the Goals Pending Action panel.

3. Click .

## Mark a goal as complete

1. From the navigation bar under My Objectives, click **GP (Goal Plan)**.
2. For a goal that you have completed, click **Mark Complete** from the Actions drop-down.

The Mark Goal Complete confirmation window opens.

**Tip:** After you mark a goal complete, you can no longer edit it.

3. On the Mark Goal Complete confirmation window:
  - If you are done editing the goal, click **OK**.
  - If you want to continue editing the goal, click **Cancel**.

## Launch goal plans

The Launch My Team Member Plans allows managers to launch Performance Goal Plans for their employees.

Follow these steps to launch a plan for your team member.

1. From the Navigation bar under Performance Planning, select Launch My Team Member Plans.
2. Select the plan you want to launch by choosing Launch Plan under the Action column.
3. Add the employees you want to launch the plan for using the arrows.
4. Once you have selected the employees you want to launch the goal plan to, choose Launch Plan.

If you want to launch the plan for all Team Members, click on the All link. This selects all Team Members to add to the launch list.

## Edit a prescribed goal

A manager can directly edit a prescribed goal that has been assigned to multiple employees. The edits are documented in the Journal when the goal is saved. After the goal is saved, an email describing the change is sent to all employees the goal was cascaded to.

Follow these steps to edit a prescribed goal.

1. From the Navigation bar under Performance Planning, select **My Goals**.
2. Click the Cascade Goals tab.
3. In the Description box, make changes.
4. Click **Save Goal to Cascade**.

The changes are saved and appear in the Previous Entries box on the Journal tab.

## View the Performance Planning Dashboard

Managers use the Performance Planning Dashboard to view detailed information about Team Member Goal Plans. Managers can also send reminder emails to Team Members, Approvers, or both.

Follow these steps to view your dashboard and send email reminders.

1. From the Navigation bar under Performance Planning, select View Dashboard.
2. Use the filter option to narrow your search results. To view all plans, set the filters to All.
3. Click **Refresh**. Results are displayed below.

**Filters**

HR Rep	All	Pending Action	All
Approver	Ramoray, Drake	# Goals	All
Dept	All	Period	Summer goals 2010
Team Member	All	Due Date Range	Start: <input type="text"/> <input type="text"/> End: <input type="text"/> <input type="text"/>

[Refresh](#)

- Use the radio buttons to send reminder emails to a Team Member, Approver or Both or place a check mark next to the selected employees and click the Remind Selected link.
- Click **Finished** to return to the Performance Planning home screen.

**Options**

Send Remind to: ☐ Team Member ☐ Approver ☒ Both

**Dashboard**

HR Rep	Approver	Dept	Team Member	Pending Action	# Due	# Goals	Period	Earliest Due Date	<input type="checkbox"/>	Actions
Mulligan, Kelly	Ramora, Drake	Engineering	Anderson, Karen	Accept Goals	1		Summer goals 2010	5/4/2010	<input checked="" type="checkbox"/>	<a href="#">Remind</a>
Mulligan, Kelly	Ramora, Drake	Engineering	Anderson, Karen	Assign Goals	1	0	Goal Period 2010	5/6/2010	<input type="checkbox"/>	<a href="#">Remind</a>

[Remind Selected](#)

[Finished](#)

## Task warning email

A task warning email can be sent to employees to remind them of tasks and goals that are coming due and past due. The email is sent a preset number of days before the task or goal due date. The email is also sent every day after the due date has passed. A sample email is shown below.

From: ☐ SilkRoad Performance Administrator

To: ☐ Michael Baxter

Cc:

Subject: Your tasks/goals are overdue or near their due date

Sent: Mon 2/3/2014 8:41 AM

The following tasks and goals are past their due date or coming due soon. Click on a task or goal to log in to <http://WorldCo-ws.silkroad.com/WorldCo> to complete it.

**Tasks**

<a href="#">Write Appraisal for Hope Williams</a>	Due	2/6/2014
<a href="#">Write Appraisal for Madison Roberts</a>	Due	2/6/2014
<a href="#">Write Appraisal for Stefano DiMera</a>	Due	2/6/2014
<a href="#">Write Appraisal for Kayla Brady</a>	Due	2/6/2014
<a href="#">Write Appraisal for Taylor Phillips</a>	Due	2/6/2014

**Goals**

<a href="#">Reduce sales processing errors</a>	Past Due	12/31/2013
<a href="#">Reduce customer complaints</a>	Past Due	12/31/2013
<a href="#">Increase sales</a>	Past Due	12/31/2013
<a href="#">Fund currently unfunded portion of strategic plan through cost savings</a>	Past Due	12/31/2013
<a href="#">Improve customer service survey scores</a>	Past Due	12/31/2013

Tasks and goals appear in separate sections in the email. The list is sorted from oldest to newest by due date. You can click a task or goal link to go directly to that task or goal in SilkRoad Performance. If there are no tasks or goals, *None* appears in the appropriate section.

# Assessments

In this section

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## Assessments overview

An Assessment is a process by which an individual's job performance is scored and assessed. The assessment process may include both internal and external assessors. Assessors evaluate an assessee's competencies in his current or future job role. The entire assessment process, whether for an individual, manager/employee or a multi-rater assessment, is automated in SilkRoad Performance. Each step of the assessment process generates emails that notify the recipient of the next step in the assessment process.

## Assessment process

Possible steps of the assessment process in SilkRoad Performance include:

1. Select assessors
2. Review assessors
3. Complete assessment
4. Review reports

### Select assessors

A manager or employee selects assessors depending on your company's process. Assessors are not necessarily company affiliates and can include other employees, managers, supervisors, directors or individuals who the assessee has worked with in the past.

### Review assessors

If an assessee selects his assessors, the manager can approve or reject the selected reviewers. If the manager review assessor functionality is selected, the selected reviewers must be approved before the process can move forward.

### Complete assessment

After the assessors have been selected and approved, emails are generated and sent to the selected assessors. The email contains the URL to access the system, a user ID and password, and any additional information to access SilkRoad Performance.

In addition, the assessee can rate himself in the selected competencies listed in the review.

## Review reports

After the assessments have been completed, the manager and assessee can view reports based on the submitted assessments. The report types are:

- Assessment Summary
- Assessment Detail
- Top 5 Strengths and Areas for Improvement

Reports are generated based on upon selected dates or completion status or manually by the administrator.

## Completing assessments

The following is an example of an assessment process flow. Your company's assessment process may be slightly different.

### Select and approve assessors

#### Assessee Role (Selecting Assessors)

1. A system generated email is sent to notify you of your new task.
2. After you have logged in to the system, you will notice your new task on your To Do list.

By selecting the link in your To-Do list, you will be directed to the assessment task that needs to be completed.

3. Choose the Select Assessors for self task by clicking on the link in your To Do list.

Select Assessors for self Status: Live and untouched	Due Date: 5/6/2010
---	--------------------

- Click the Add link under the actions column in the appropriate category. This allows you to add assessor counts.

**Select Assessors** [Hide](#)

On this page you will select/delete assessors (by clicking add or delete in the action column (if the assessment is a multi-rater or 360), remind assessors once they have been selected, enter or view journal entries (or comments) about the process, and view assessment completion status.

**Assessors**

Category	Min	Max	Count	Assessor	Email	Status	Reminded	Actions
Self	1	1	1					
Manager	1	1	1	Anderson, Karen	test@silkrad.com	Required		
				Ramora, Drake	test@silkrad.com	Required		
Customer	0	9	0					<a href="#">Add</a>
Direct Report	0	9	0					<a href="#">Add</a>
Peer	0	9	0					<a href="#">Add</a>
Overall	6	29	2					

**Journal**

Author	Timestamp	Entry
Voyager WingSpan	5/3/2010 2:40 PM	Admin Launched Assessment.

[Show Less](#)

- In the search box, enter the first and last name of the person you want to add. Additional information, such as the email address, department and/or division, will help narrow your search results.
- Click **Search**. The results appear at the bottom of the page.

**Add Assessor**

Add an assessor by either searching the database or add a new person by clicking the "New" button.

**First Name**   
**Last Name**   
**Email Address**   
**Department**   
**Division**

**Search Results**

Name	Email	
Gail, Emily	no-reply@silkrad.com	<input type="checkbox"/>

- Place a check mark next to the employee you want to add and click **Add**.

If the person you want to add is not listed in the database, you may add them by clicking **New** and entering the appropriate information.

**Add Assessor**

Add a new person to the database by typing in their first name, last name, and email address. If the person matches someone already in the database, a confirmation screen will be presented asking you to make sure the person is not a duplicate.

**First Name**

**Last Name**

**Email Address**

8. Continue adding assessors until you have reached the number required without exceeding the maximum allowed.
9. Include any notes in the Journal area and click **Save**.
10. Should you need to delete an assessor, click the Delete link next to his or her name.
11. After you have selected at least the minimum number of assessors, click **Launch** or **Request Approval** if you are required to have approval from your manager.

The Request Approval or Launch option is not visible unless the minimum number of assessors is met.

If your company chooses to require manager approval of assessors, your manager will receive an email request to review your selected assessors.

If your manager accepts your assessor selection, he or she is prompted to launch the assessment.

If your manager rejects any or all of the selected assessors, you will receive an email notifying you of the rejection. After receiving an email notification, you can select alternate assessors and submit for approval.

### Manager Role (Approving Assessors)

1. A system generated email is sent to notify you of your new task.
2. After you have logged in to the system, you will notice your new task on your To Do list.

By selecting the link in your To Do list, you will be directed to the assessment task that needs to be completed.

3. From your To Do list, select **Review Assessors** for the task you need to complete.

Review Assessors for Anderson, Karen

Due Date: 5/13/2010

Status: Live and untouched

4. Review the list of assessors. You may choose to **Approve** or **Disapprove** one or all of the listed assessors.

If you choose to **Approve All**, emails will be sent to the listed assessors and assessee, permitting the Assessment process to continue.

If you choose to **Disapprove All**, an email is sent to notify the assessee of the rejection. The assessee is prompted to submit another list of assessors for you to review and approve.

If you choose to **Disapprove** of one or more assessor's from the list, an email is sent to notify the assessee of the rejection. The assessee will need to submit another list of assessors for you to approve.

In order for the Assessment process to continue, the manager **MUST** approve the entire Assessor list.

Managers may enter comments in the Journal area. Once text has been entered, click Save. In order for a message to be sent with the rejection, you **MUST** save the entry before you select Send Back.

5. Once you have approved the Assessor List, you must Launch the assessment to continue the process. Click **Launch Assessments** at the bottom of the page.
6. An email is sent to each assessor and the assessee asking him or her to complete the assessment.

## Complete the assessment forms

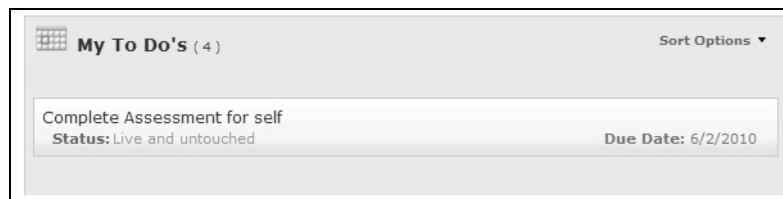
As the assessee and selector of assessors, you can manage the Assessment process by reviewing the status of assigned assessments.

You also have the option to:

1. Remind an assessor of his or her task by clicking on the Remind link in your Select Assessors screen. This prompts a system generated reminder, a copy of the original email, to be created and sent to the selected assessor.
2. Add or delete assessors after your assessment has launched by accessing your Select Assessors screen.

Follow these steps to complete an assessment form:

1. A system generated email is sent to notify you of your new task.
2. After you have logged in to the system, you will notice your new task on your To Do list.



3. Access the assessment by selecting the Complete Assessment link on your To Do list or from the Navigation bar under Complete Assessments.

Below the heading are instructions you will need to read through to understand the process of completing the assessment form.



4. Complete the form in its entirety, making sure to answer all required questions.

It is important to remember that you must complete all required information to Submit.

5. Click one of the following buttons:

**Cancel** — To close the assessment without saving changes.

**Decline** — To decline completing the assessment. You are prompted to confirm your choice. Clicking **Yes** sends an email notification to the assessee and makes the assessment unavailable for you to edit.

**Calculate** — To calculate the overall and current performance rating.

**Create Report** — To create a report including current rating scores. You may optionally choose to download the report as a PDF or HTML file.

**Save** — To save your work on the assessment form. You may access the assessment form later.

**Submit** — To save your work and submit the completed assessment. It is important to remember that you cannot submit an assessment without completing all of the required questions. You will receive a confirmation pop-up indicating that your save and submission are complete.



Email notifications are generated as the assessments are completed.

Notifications are sent to the assessee and his or her manager. Assessors also receive email confirmation of task completeness.

The following provides additional important information about completing an assessment and the assessment process.


- The assessment form uses a rating scale to rate behavior and/or competency for each task listed in the assessment. Each assessment has a corresponding rating scale and a description to help you identify the meaning of each score.

Your company's rating scale may be different from this example.

**Rating Scale Descriptions**  
  
**RATING SCALE**  
Place the corresponding rating in the box provided which best describes performance.  
  
5- Exemplary- Performance is clearly distinguished; reflects superior effort and exceptional results and is evident by others.  
4- Very Competent- Performance consistently meets and often significantly exceeds established expectations. Performance reflects a high degree of initiative and high quality results.  
3- Competent- Performance consistently meets all job standards and expectations. Solid, all-around performance.  
2- Needs Development- Performance may meet some, but does not consistently meet established job standards. Individual requires counsel, guidance and supervision. Performance improvement is necessary to demonstrate initiative and to attain competency in key areas of current position. Action plan for improvement is mandatory.  
1- Must be Improved- Performance in key areas is at an unacceptable level. Performance improvement must be achieved to justify retention in position. Action plan for improvement is mandatory.

- Comment sections are used throughout the form to allow the assessor to add additional information to support the rating. In addition, your form may include general comment boxes that allow you to enter general comments or copy & paste from documents and email.

**Summary of Strengths**  

 Enter Comment

You may move the comment box to view the underlying form by moving your mouse cursor over the Comment Heading bar. This will reveal the Move Comment Box option.

 Enter Comment

 Move Comment Box

- In addition, you have the option to save, print or create a PDF by selecting from the Options bar at the top of your assessment.

Options




When you select create a PDF, your final version of the form eliminates all of the instructions and rating information.

Depending on the configuration of your system, you may have the option to check compliance and/or utilize spell check. When enabled, the icons are displayed in the comment box.

## Review assessments

Once all the assessments have been completed and closed, you can review the assessments completed on your behalf or if you are a manager, you can view your employee's assessments.

Follow these steps to view completed assessments:

1. A system generated email is sent to notify you of your new task.
2. From the Navigation bar under Assessments, select Complete Assessments.
3. Select the View Assessment link next to the assessment you wish to review.

Select Assessment					
Due Date	Assessee	Type	My Relationship	Profile	Action
4/30/2008	Karen Anderson	Competency	Manager	2008 Assessment - Management Potential	<a href="#">View Assessment</a>
4/30/2008	John Black	Competency	Manager	2008 Assessment - Management Potential	<a href="#">View Assessment</a>
4/30/2008	Marlena Evans	Competency	Manager	2008 Assessment - Management Potential	<a href="#">View Assessment</a>
4/30/2008	Michael Baxter	Competency	Manager	2008 Assessment - Management Potential	<a href="#">View Assessment</a>
3/31/2009	Michael Baxter	Competency	Manager	2009 Assessment - Customer Service Manager	<a href="#">View Assessment</a>
6/2/2010	Karen Anderson	Competency	Manager	2008 Assessment - Customer Service Rep	<a href="#">View Assessment</a>

[Close](#)

## Manage assessments

Assessments can be accessed through Manage Assessments on the Navigation bar. The screen provides you with the option to view, add, remind or delete assessors. In addition, you can monitor the progression of your Assessment process by viewing the journal log.

It is important to remember that you can only send one daily reminder to each of your assessors.

The Manage Assessment screen allows you to view details about your assessment process. Here you can determine the minimum and maximum number of assessors allowed for each category. The categories for your assessment may include customers, direct reports, your manager and peers. For each category, minimum and maximum assessor counts are listed. The number for each category is predetermined by your administrator. The minimum number is the minimum number of assessors that must be selected for the assessment. Likewise, the maximum indicates the maximum number of assessors that may be chosen.

First it is necessary to select the assessment package to manage. In the Actions column for the assessment to review, select Manage assessment.

To delete an assessor from this screen click the Delete link.

**Select Assessors** [Hide](#)

On this page you will select/delete assessors (by clicking add or delete in the action column (if the assessment is a multi-rater or 360), remind assessors once they have been selected, enter or view journal entries (or comments) about the process, and view assessment completion status.

**Assessors**

Category	Min	Max	Count	Assessor	Email	Status	Reminded	Actions
Self	1	1	1					
				Anderson, Karen	karen.anderson@silkroad.com	Completed		
Manager	1	1	1					
				Ramoray, Drake	drake.ramoray@silkroad.com	Completed		
Customer	0	9	0					<a href="#">Add</a>
Direct Report	0	9	0					<a href="#">Add</a>
Peer	0	9	5					<a href="#">Add</a>
				Baxter, Michael	michael.baxter@silkroad.com	Untouched		<a href="#">Delete</a> <a href="#">Remind</a>
				Brady, Carrie	carrie.brady@silkroad.com	Untouched		<a href="#">Delete</a> <a href="#">Remind</a>
				Gail, Emily	emily.gail@silkroad.com	Untouched		<a href="#">Delete</a> <a href="#">Remind</a>
				Parker, Joe	joe.parker@silkroad.com	Untouched		<a href="#">Delete</a> <a href="#">Remind</a>
				Roberts, Madison	madison.roberts@silkroad.com	Untouched		<a href="#">Delete</a> <a href="#">Remind</a>
<b>Overall</b>	<b>6</b>	<b>29</b>	<b>7</b>					

**Journal**

Author	Timestamp	Entry
Voyager WingSpan	5/3/2010 3:41 PM	Manager approved assessors and launched assessments.
Voyager WingSpan	5/3/2010 2:54 PM	Selector requested approval of assessors.
Voyager WingSpan	5/3/2010 2:40 PM	Admin Launched Assessment.

[Show Less](#)

## Aggregate reports

Once the assessments have been completed and closed, you can view reports created on your behalf or if you are a manager, you can view your employee's assessment reports.

SilkRoad Performance offers three different report options including Assessment Summary, Assessment Detail and Strengths & Room for Improvement.

Follow these steps to a view a report:

1. From the Navigation bar under Assessments, select Aggregate Reports.
2. Use the filters to narrow your search results and view the corresponding reports.

Select your filters and click **Show Filters**. Your selected filters are displayed.

Click **OK** to view the available reports. The reports are listed at the bottom of the screen.

Click **Reset Filters** to reset the filters. You can choose to apply Assessment, Employee and/or Relationship filters.

3. A list of available reports is located at the bottom of the screen.
4. Select the report you wish view by clicking the View Report link.
5. When you are done reviewing the report, click Finished to return to the User Reports screen. Optionally choose to Download PDF or Download HTML.

Reports		
Report Name	Description	Action
Aggregate Assessment Summary	Aggregate Summary Report of Assessment Ratings	<a href="#">View Report</a>
Aggregate Assessment Detail	Aggregate Detailed Report of Assessment Ratings	<a href="#">View Report</a>
Aggregate Top 5 Strengths & Areas for Development	Aggregate Report of five Highest and Lowest Assessment Ratings	<a href="#">View Report</a>

# Development planning

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## Development planning overview

Using development planning, employees can create and manage a plan of activities to accomplish. SilkRoad Performance development planning links an individual's development needs to specific development activities.

SilkRoad Performance makes it easy to create and manage an employee's development plan. SilkRoad Performance includes a library of development activities that can be mapped to your company's specific competencies. You can also import your own development libraries and link to external web content such as content housed in a Learning Management System (LMS).


## SilkRoad Performance and SilkRoad Learning integration

If your company is using SilkRoad Learning management system (LMS) along with SilkRoad Performance, training activities and eCourses from SilkRoad Learning's course catalog are automatically updated in SilkRoad Performance's Activity Library. An employee is automatically registered in a SilkRoad Learning course when the course is added to the employee's Development Plan. Course results from SilkRoad Learning are automatically updated in the Development Plan.

## Development Plan

SilkRoad Learning eCourse and training activities can be added to a Development Plan directly in the plan by the employee or as part of an appraisal process by a reviewer.

When a SilkRoad Learning course is added to a Development Plan, the activity is initially given a status of Assigned.

Development Plan						
Show 						
25 ▾	<input type="checkbox"/> Show Archived Activities <a href="#">Add</a>					
Activity Name	Type	Code	Added By	Dates	Status	Actions
CompTIA® Certification: A Comprehensive Approach for All 2009 Exam Objectives (Part 3 of 7)	eCourse		Phillips, Taylor	Added: 5/30/2012 End: 6/5/2012	Completed	<a href="#">View/Journal</a> <a href="#">Archive</a>
Leading From the Front: Being a Leader in All You Do (Includes Simulation)	eCourse		Phillips, Taylor	Added: 5/30/2012	Assigned	<a href="#">View/Journal</a> <a href="#">Delete</a>
Breakthrough Thinking, the Seven Principles of Creative Problem	Book	ISBN: 0761506489	Phillips, Taylor	Added: 10/3/2012	Active	<a href="#">Edit</a> <a href="#">Complete</a> <a href="#">Delete</a>
Page 1 of 1 (3 records) <a href="#">First</a> <a href="#">Previous</a> <a href="#">Next</a> <a href="#">Last</a>						

An automated process runs once a day that registers the employee for the course in SilkRoad Learning and updates the activity status in SilkRoad Performance to Active. Active SilkRoad Learning courses have a Launch Course action, which allows the employee to launch a SilkRoad Learning window.

**Development Plan**

Show

25

Activity Name	Type	Code	Added By	Dates	Status	Actions
CompTIA® Certification: A Comprehensive Approach for All 2009 Exam Objectives (Part 3 of 7)	eCourse		Phillips, Taylor	Added: 5/30/2012 End: 6/5/2012	Completed	<a href="#">View/Journal</a> <a href="#">Archive</a>
Leading From the Front: Being a Leader in All You Do (Includes Simulation)	eCourse		Phillips, Taylor	Added: 5/30/2012	Active	<a href="#">Launch Course</a> <a href="#">View/Journal</a> <a href="#">Delete</a>
Breakthrough Thinking, the Seven Principles of Creative Problem	Book	ISBN: 0761506489	Phillips, Taylor	Added: 10/3/2012	Active	<a href="#">Edit</a> <a href="#">Complete</a> <a href="#">Delete</a>

Page 1 of 1 (3 records)  
First Previous Next Last

SilkRoad Learning courses in the Development Plan have a View/Journal action that allows the employee to view activity details and write a journal entry. Employees cannot edit Participation information.

**View Activity**

Show

Activity	Participation
<b>Source</b> GL <b>Style</b> Training <b>Type</b> eCourse <b>External ID</b> 265 <b>Code</b> <b>Name</b> Leading From the Front: Being a Leader in All You Do (Includes Simulation) <b>Description</b> <b>Version</b> 3.0.1 <b>Keywords</b>	<b>Added By</b> Phillips, Taylor <b>Added Date</b> 5/30/2012 <b>Status</b> Active

**Journal**

**New Notes Entry**

**Previous Entries**

Activity added to development plan.

By: Voyager WingSpan On: Wednesday, May 30, 2012

When a course is completed in SilkRoad Learning, the associated activity in SilkRoad Performance is automatically updated as completed. On the View Activity page, the employee can view the course's Status, Score, and End Date. End Date corresponds to Mastery Date in SilkRoad Learning.

**View Activity**

[Show](#)

Activity		Participation	
Source	GL	Added By	Phillips, Taylor
Style	Training	Added Date	5/30/2012
Type	eCourse	Status	Completed
External ID	264	Completion	
Code		Score	Passed
Name	CompTIA® Certification: A Comprehensive Approach for All 2009 Exam Objectives (Part 3 of 7)	End Date	6/5/2012
Description			
Version	3.0.1		
Keywords			

[Cancel](#)

**Journal**

**New Notes Entry**

[Add Entry to Notes](#)

**Previous Entries**

Activity added to development plan.

By: Voyager WingSpan On: Wednesday, May 30, 2012

## View and manage your development plan

You can view and manager your development plan through SilkRoad Performance.

Follow these steps to view and manage your development plan.

1. From the Navigation bar, select Manage Development Plan. The Development Plan page displays.

**Development Plan**

[Show](#)

25  [Add](#)

Activity Name	Type	Code	Added By	Dates	Status	Actions
CompTIA® Certification: A Comprehensive Approach for All 2009 Exam Objectives (Part 3 of 7)	eCourse		Phillips, Taylor	Added: 5/30/2012 End: 6/5/2012	Completed	<a href="#">View/Journal Archive</a>
Leading From the Front: Being a Leader in All You Do (Includes Simulation)	eCourse		Phillips, Taylor	Added: 5/30/2012	Active	<a href="#">Launch Course</a> <a href="#">View/Journal</a> <a href="#">Delete</a>
Breakthrough Thinking, the Seven Principles of Creative Problem	Book	ISBN: 0761506489	Phillips, Taylor	Added: 10/3/2012	Active	<a href="#">Edit</a> <a href="#">Complete</a> <a href="#">Delete</a>

Page 1 of 1 (3 records)  
First Previous Next Last

2. Each activity associated with your development plan is listed on this page. You can see the activity name, type of activity (for example, ecourse, book, or class), who added the



activity (you or your manager), the dates on which it was added and the date on which you need to complete the activity, current status of the activity (completed or active).

If your organization has chosen to link activities to goals and assessments, an additional column called Links is displayed.

Additionally, the Actions column allows you to manage the activity. Actions are explained in the following sections.

## View/Journal

This action is available for all activities. When you click this link, the View Activity page displays.

View Activity

Show

Activity

SourceGL  
StyleTraining  
TypeeCourse  
External ID264  
Code  
NameCompTIA® Certification: A Comprehensive Approach for All 2009 Exam Objectives (Part 3 of 7)  
Description  
Version3.0.1  
Keywords

Participation

Added ByPhillips, Taylor  
Added Date5/30/2012  
StatusCompleted

Completion

ScorePassed  
End Date6/5/2012

Cancel

Journal

New Notes Entry

Add Entry to Notes

Previous Entries

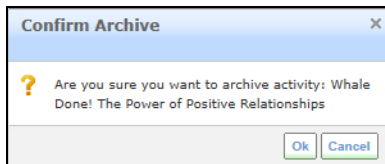
Activity added to development plan.

By: Voyager WingSpan On: Wednesday, May 30, 2012

Review the information on the page. If desired, add a note in the New Notes Entry field, then click the **Add Entry to Notes** button.

## Archive

This action is available for any activity created through SilkRoad Performance that has a Completed status. Archiving an activity removes it from view in the Development Plan. You can still see archived activities, however, by clicking the Show Archived Activities box in the upper right corner of the page. When you click the Archive link in the Actions column for an activity, a warning message displays asking if you want to archive the activity. Click **Yes** to archive it.



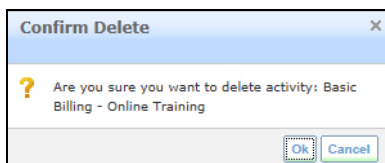
## Launch Course

SilkRoad Learning activities in SilkRoad Performance have a type of eCourses or Training Activity. When a SilkRoad Learning activity is added to a development plan it initially has a status of Assigned. The Assigned activities are automatically registered in SilkRoad Learning and given a status of Active. The "Launch Course" action is available for any SilkRoad Learning activity that has a status of Active.

Click Launch Course to open a new browser window containing the SilkRoad Learning application. If you are already logged in to SilkRoad Learning, you are taken to the SilkRoad Learning course, if the activity is an eCourse. If the activity is a training activity, you are taken to the Schedule page, allowing you to enroll in scheduled training events for the activity. If you are not logged in, you are taken to the Log In page first.

## Delete

This action is available for any activity created through SilkRoad Performance with a status of Active that was added by you (the user) in the development plan. It may or may not be available for activities added from an appraisal process. It depends on the Activity List supporting data configuration for the step. When you click the Delete link in the Actions column for an activity, a message displays asking if you want to delete the activity. Click **OK** to delete it.



## Edit

This action is available for activities created in SilkRoad Performance that have not been completed. Click the Edit link to edit an activity. The Edit Activity page displays.

Hide

Activity

SourceWS  
Style  
TypeBook  
NameBreakthrough Thinking, the Seven Principles of Creative Problem  
DescriptionPrima Prima Publishing and Communication  
URLhttp://www.amazon.com/Breakthrough-Thinking-Principles-Creative-Problem/dp/0761506489/ref=sr\_1\_1?ie=UTF8&qid=1338404627&sr=8-1  
ISBN: 0761506489  
Code  
Resource/VendorAmazon Book Store  
Author First NameGerald  
Author Middle Init  
Author Last NameNadler  
Year1998  
ApprovalNo  
KeywordsCreativity

Participation

Added ByPhillips, Taylor  
Added Date10/3/2012  
StatusActive  
Start Date10/3/2012  
End Date11/30/2012  
Date Purchased10/4/2012  
DescriptionI will read the book and write an overview of what I've learned.

SaveCancel

Journal

New Notes Entry

Add Entry to Notes

Previous Entries

Activity added to development plan.

By: Voyager WingSpan On: Wednesday, October 03, 2012

Complete the fields in the Participation section. You can change the date on which you started or ended the activity, the purchase date (if applicable), and the description of your participation in the activity. Add any journal notes in the New Notes Entry text field and click **Add Entry to Notes**. Notes displays in the Previous Entries field. Click **Save** when finished.

## Complete

This action is available for activities created in SilkRoad Performance that have not been completed. Click the Complete link to complete an activity. The Complete Activity page opens.

**Complete Activity**

[Hide](#)

**Activity**

Source: WS

Style: Book

Type: Book

Name: Breakthrough Thinking, the Seven Principles of Creative Problem

Description: Prima Prima Publishing and Communication

URL: [http://www.amazon.com/Breakthrough-Thinking-Principles-Creative-Problem/dp/0761506489/ref=sr\\_1\\_1?ie=UTF8&qid=1338404627&sr=8-1](http://www.amazon.com/Breakthrough-Thinking-Principles-Creative-Problem/dp/0761506489/ref=sr_1_1?ie=UTF8&qid=1338404627&sr=8-1)

Code: ISBN: 0761506489

Resource/Vendor: Amazon Book Store

Author First Name: Gerald

Author Middle Init: Nadler

Author Last Name: Nadler

Year: 1998

Approval: No

Keywords: Creativity

**Participation**

Added By: Phillips, Taylor

Added Date: 10/3/2012

Status: Active

Start Date: 10/3/2012

End Date: 11/30/2012

Cost: 24,9500

Date Purchased: 10/4/2012

Description: I plan to read the book and then write an overview of what I've learned.

**Completion**

Score\*:

Content Quality\*:

Evaluation\*:

[Complete](#) [Cancel](#)

**Journal**

**New Notes Entry**

[Add Entry to Notes](#)

**Previous Entries**

Activity added to development plan.

By: Voyager WingSpan On: Wednesday, October 03, 2012

Complete the fields in the Completion section. Add any journal notes in the New Notes Entry text field and click **Add Entry to Notes**. Notes displays in the Previous Entries field. Click **Save** when finished.

## Add an activity to your development plan

Follow these steps to add activity to your plan.

1. From the Navigation bar under Development Planning, select Manage Development Plan.

- Click the **Add** button in the top right corner of the page. The Select Activity page displays.

**Select Activity**

[Hide](#)

**Hide Filter**

Search for:

☒ Name ☐ Description ☐ Keyword ☐ Author

Code:

Style: **Media**  
 Experiential  
 Training  
 Education

Type: **Article**  
 Audio/Video  
 Book  
 CBT

[Search](#) [Reset](#)

[Return](#)

- Complete the filter fields at the top of the page to narrow your results, then click **Search**. Results display on the bottom portion of the page.

**Select Activity**

[Hide](#)

**Hide Filter**

Search for:

☒ Name ☐ Description ☐ Keyword ☐ Author

Code:

Style: **Media**  
 Experiential  
**Training**  
 Education

Type: **CBT**  
 ECOURSE  
 Seminar/workshop - Internal  
 Seminar/workshop - Offsite

[Search](#) [Reset](#)

25 [Return](#)

Name	Type	Code	In Plan	Actions
Corporate Accounting Standards	ECOURSE			<a href="#">Add</a>
Accounting Orientation	TRAINING_ACTIVITY			<a href="#">Add</a>
Slips, Trips, and Falls (Third Edition)	ECOURSE			<a href="#">Add</a>
CompTIA® Certification: A Comprehensive Approach for All 2009 Exam Objectives (Part 3 of 7)	ECOURSE			<a href="#">Add</a>
Leading From the Front: Being a Leader in All You Do (Includes Simulation)	ECOURSE			<a href="#">Add</a>
Anti-Sexual Harassment Training for Supervisors	ECOURSE			<a href="#">Add</a>
Anti-Sexual Harassment Training for Employees	ECOURSE			<a href="#">Add</a>
Microsoft® Excel® 2010: PivotTables	ECOURSE			<a href="#">Add</a>
Stone Temple Pilots	TRAINING_ACTIVITY			<a href="#">Add</a>
Stone Temple Pilots	TRAINING_ACTIVITY			<a href="#">Add</a>

Page 1 of 1 (10 records)

- Select the activity you want to add by clicking the **Add** link in the Actions column.

or

Click **Reset** to reset your search filters. **Hide Search** hides your filters and search-by options.

- Enter journal notes, if desired, and then click **Add Entry to Notes**.
- Click **Save** to save the activity to you Development Plan.

# Interactive reports

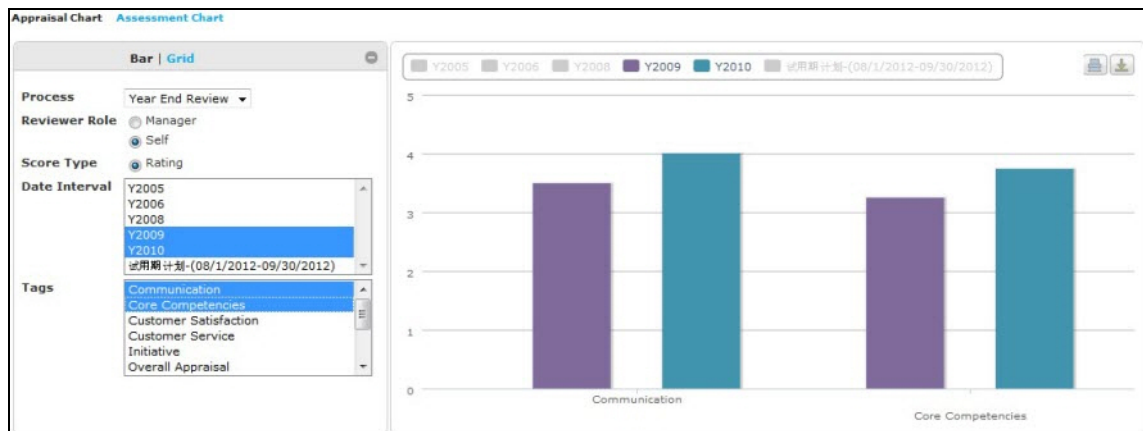
In this section

Interactive reports overview .....	60
Appraisal Chart .....	60
Assessment Chart.....	62

## Interactive reports overview

Interactive reports provide users and administrators with a deeper level of information from the appraisal and assessment process.

## Appraisal Chart





The Appraisal Chart shows appraisal ratings for various processes tracked over time. The chart has two display views: Bar and Grid. You can access the Appraisal Chart by clicking the Reports tab from the Employee Profile.

The page has two main sections:

- Control panel
- View panel

### Control panel

The Control panel (left side of page) is where you choose a display view and select criteria. The display view controls how the chart is displayed, and you can toggle between views to see how they differ. When selecting criteria, you can use the Shift and Ctrl keys to select multiple criteria.

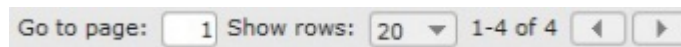
You can also expand or contract the panel by clicking  or .



### View panel

The View panel (right side of page) displays the chart. It reflects the criteria and display view that you selected. Depending on the display view, additional features are available. If the display view is:

- Grid, you can sort grid columns and set the sort order. Mouse over and click on the column name. This sets the selected column as the primary sort filter criteria. To add additional sort criteria, mouse over the column name and set the sort order value. You can sort in ascending or descending order.

You can also use the navigation bar to go to a specific page, set the maximum number of rows to show per page, and move page-by-page.



- Something other than Grid, you can click active labels (keys) to toggle the criteria to change the view. You can also click  to print the chart.
- Regardless of the display view, you can click  to return to the Home page.

## View your Appraisal Chart



1. On the Home page, click [Profile](#).
2. Click the Reports tab.
3. Click **Appraisal Chart**.
4. In the Control panel, select a display view:
  - Bar
  - Grid
5. Select the criteria for the chart.

The results appear in the View panel.

## Print your Appraisal Chart

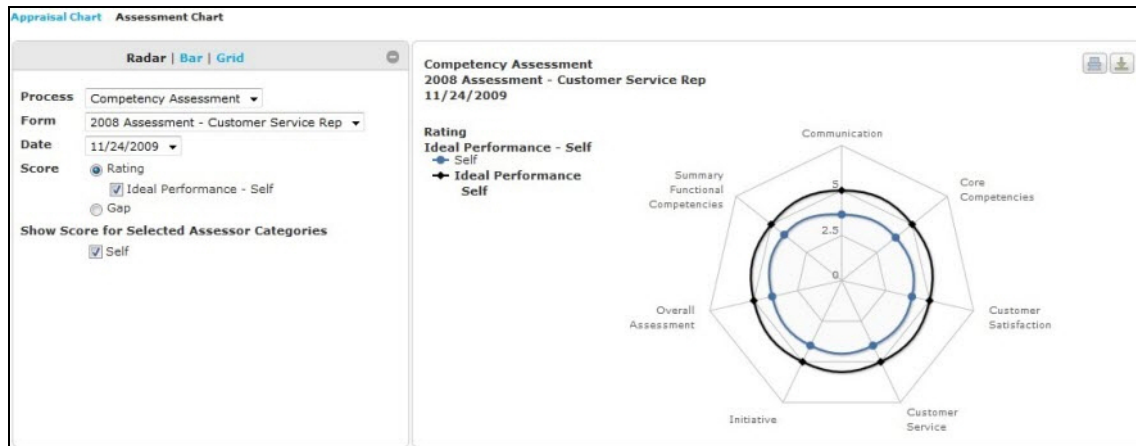


1. On the Home page, click [Profile](#).
2. Click the Reports tab.
3. Click **Appraisal Chart**.
4. In the Control panel, select a display view:
  - Bar
  - Grid
5. Select the criteria for the chart.

The results appear in the View panel.

6. Click .

## Assessment Chart



The Assessment chart shows patterns in competency performance. It can be useful when comparing actual performance to gain insights into areas of strength and areas that need improvement. Knowledge of areas that need improvement can be used to create a Development Plan.

The chart has these display views: Radar, Bar, and Grid.



You can view the Assessment Chart by clicking the Reports tab from the Employee Profile.

The page has two main sections:

- Control panel
- View panel

### Control panel

The Control panel (left side of page) is where you choose a display view and select criteria. The display view controls how the chart is displayed, and you can toggle between views to see how they differ. When selecting criteria, you can use the Shift and Ctrl keys to select multiple criteria.

You can also expand or contract the panel by clicking  or .

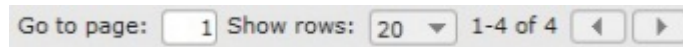
### View panel


The View panel (right side of page) displays the chart. It reflects the criteria and display view that you selected. Depending on the display view, additional features are available. If the display view is:



- Grid, you can sort grid columns and set the sort order. Mouse over and click on the column name. This sets the selected column as the primary sort filter criteria. To add additional sort criteria, mouse over the column name and set the sort order value. You can sort in ascending or descending order.

You can also use the navigation bar to go to a specific page, set the maximum number of rows to show per page, and move page-by-page.



- Something other than Grid, you can click active labels (keys) to toggle the criteria to change the view. You can also click  to print the chart.

Regardless of the display view, you can click  to return to the Home page.

## View your Assessment Chart



1. On the Home page, click [Profile](#).
2. Click the Reports tab.
3. Click **Assessment Chart**.
4. In the Control panel, select a display view:
  - Radar
  - Bar
  - Grid
5. Select the criteria for the chart.

The results appear in the View panel.

## Print your Assessment Chart



1. On the Home page, click [Profile](#).
2. Click the Reports tab.
3. Click **Assessment Chart**.
4. In the Control panel, select a display view:
  - Radar
  - Bar
  - Grid
5. Select the criteria for the chart.

The results appear in the View panel.

6. Click .

# Journal

In this section

My Journals .....	65
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View the journal in an appraisal .....	70
Journal comments viewable during appraisal .....	71


## My Journals

The Employee Journal feature allows individuals to write confidential notes and keep them organized by type. The types are configurable by your HR Administrator and may include categories such as Disciplinary, Performance and Attendance.

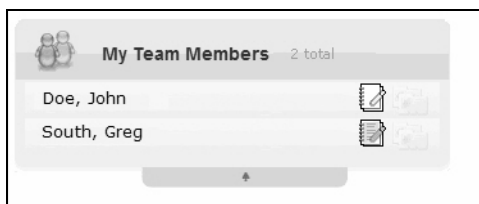
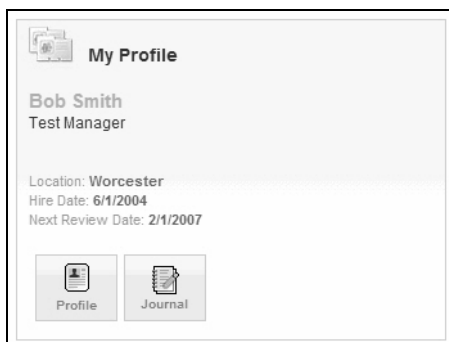
Journal entries can only be read by the author and the HR Administrator. The author can view, edit and delete journal entries he or she has written at any time.

The My Journal screen is accessible by clicking on the My Journals link on the Navigation bar.



To view your Personal Journal, click on the  Journal icon in the My Profile section of your home page or click on the Personal Journal link on the Navigation bar. In addition, if you have Team Members listed on your Home Page, you will find a Journal icon for each of your Team Members listed on the My Team Members section. Clicking on the Journal icon allows you to add journal entries for your employees.

The My Journals screen allows users to create a new journal entry for an employee or select an existing journal.

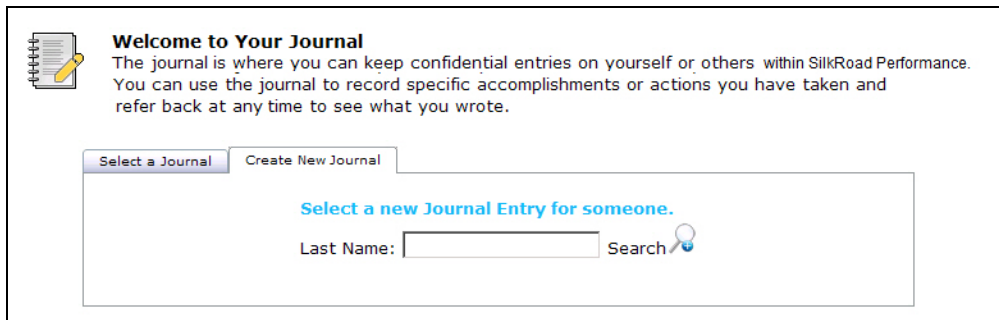


## Add a journal entry

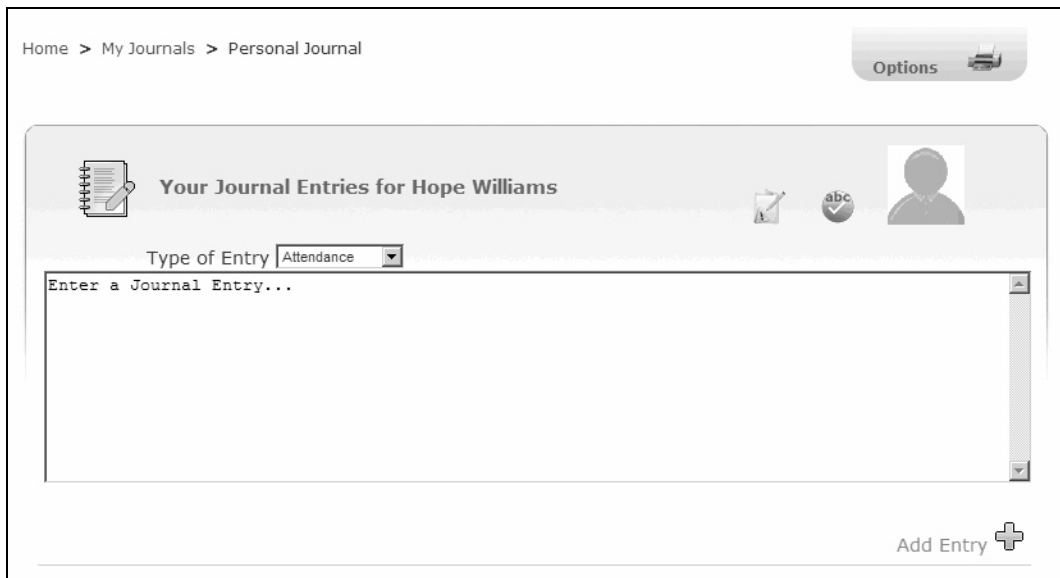
The Journal is where you can keep confidential entries on yourself or others within SilkRoad Performance. You can use your Journal to record specific accomplishments or actions you have taken and refer to them at any time.

Follow these steps to create a new journal and entry.

1. From the Navigation bar under Journal, select My Journals.
2. Click on the Create New Journal tab.



3. Enter the last name of the employee you want to create the Journal for and click **Search**.
4. Click on the employee's name from the list.
5. Select the Type of Entry from the drop-down field. Journal types may include Attendance, Disciplinary and Performance.
6. Enter your journal entry and click **Add Entry**.

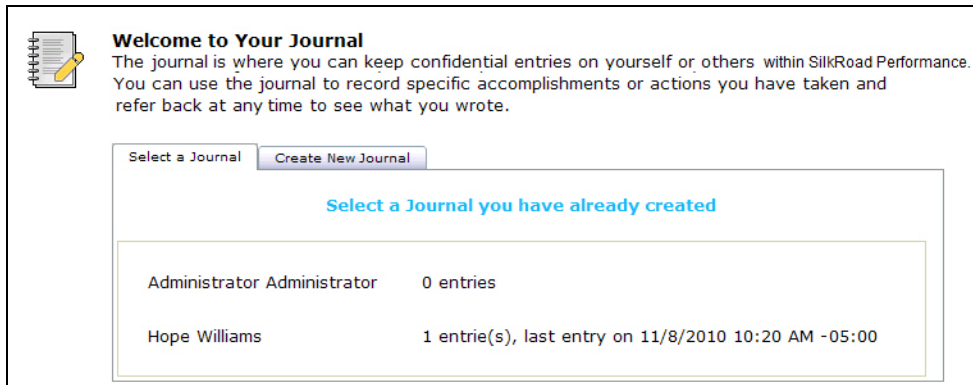


You have the option to print Journal entries by clicking on the Printer icon at the top of the screen.

Depending on the configuration of your system, you may have the option to check compliance and/or utilize spell check. When enabled, the icons are displayed at the top of the page.

Follow these steps to add a journal entry to an existing Journal.

1. From the Navigation bar under Journal, select My Journals.
2. Click on the Select a Journal tab.



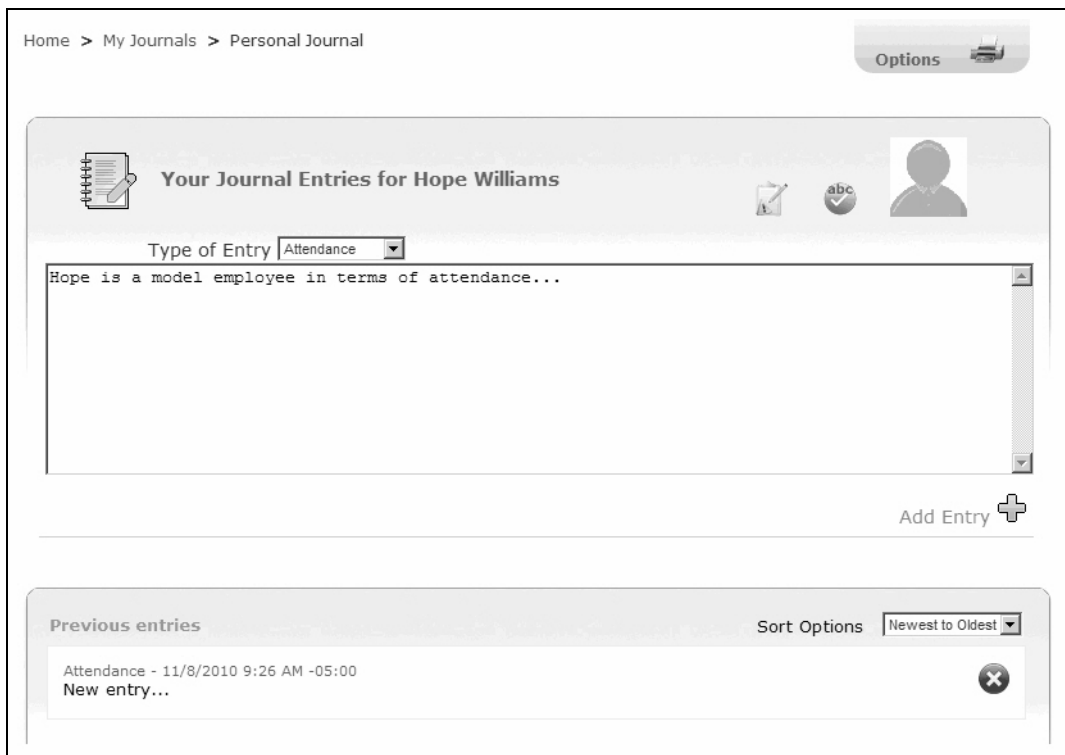
**Welcome to Your Journal**  
The journal is where you can keep confidential entries on yourself or others within SilkRoad Performance. You can use the journal to record specific accomplishments or actions you have taken and refer back at any time to see what you wrote.

Select a Journal    Create New Journal

Select a Journal you have already created

Administrator Administrator	0 entries
Hope Williams	1 entrie(s), last entry on 11/8/2010 10:20 AM -05:00

3. Select the employee from the list.
4. Select the entry type from the drop-down field.



Home > My Journals > Personal Journal

Options

**Your Journal Entries for Hope Williams**

Type of Entry: Attendance

Hope is a model employee in terms of attendance...

Add Entry +

Previous entries    Sort Options: Newest to Oldest

Attendance - 11/8/2010 9:26 AM -05:00  
New entry...

5. Enter the text and click **Add Entry** to save your journal entry.

You have the option to print Journal Entries by clicking on the Printer icon at the top of the screen.

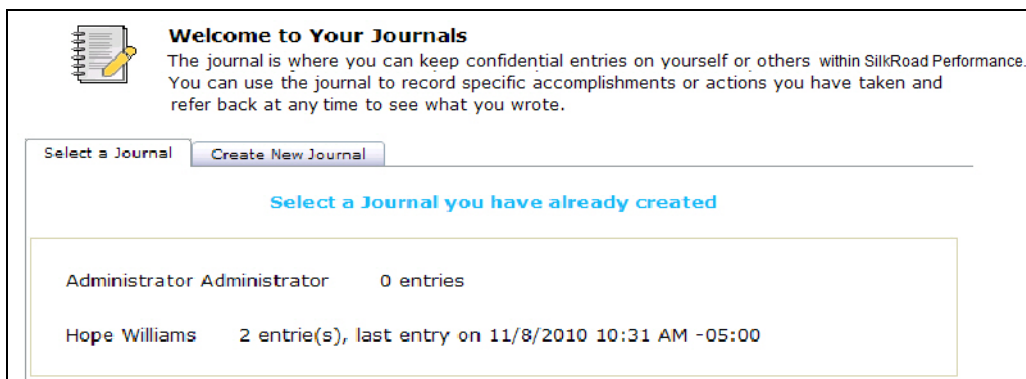
In addition, previous Journal entries are listed at the bottom. Click on the Journal entry to

view your comments or click  to delete the entry.

## View a journal entry

Follow these steps to view a journal entry.

1. From the Navigation bar under Journal, select My Journals.
2. Select the Journal you want to view by clicking on the employee's name.



**Welcome to Your Journals**  
The journal is where you can keep confidential entries on yourself or others within SilkRoad Performance. You can use the journal to record specific accomplishments or actions you have taken and refer back at any time to see what you wrote.

Select a Journal

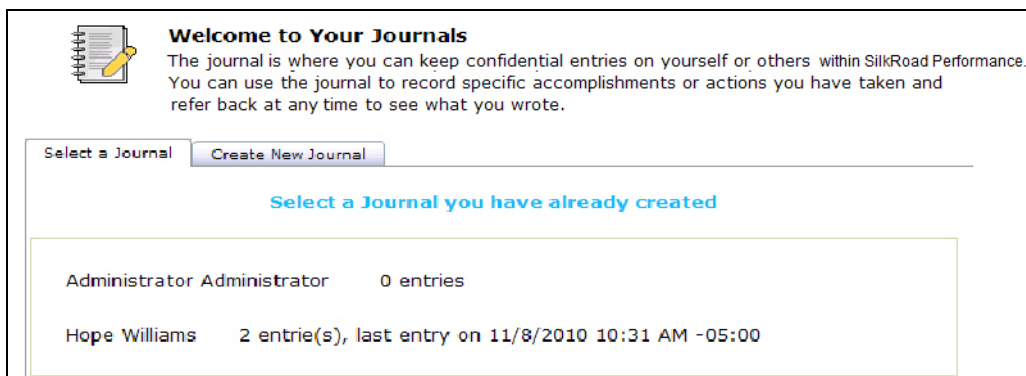
Select a Journal you have already created

Administrator Administrator	0 entries
Hope Williams	2 entrie(s), last entry on 11/8/2010 10:31 AM -05:00

## Edit a journal entry

Follow these steps to edit a journal entry.

1. From the Navigation bar under Journal, select My Journals.
2. Select the Journal you want to edit by clicking on the employee's name.



**Welcome to Your Journals**  
The journal is where you can keep confidential entries on yourself or others within SilkRoad Performance. You can use the journal to record specific accomplishments or actions you have taken and refer back at any time to see what you wrote.

Select a Journal

Select a Journal you have already created

Administrator Administrator	0 entries
Hope Williams	2 entrie(s), last entry on 11/8/2010 10:31 AM -05:00

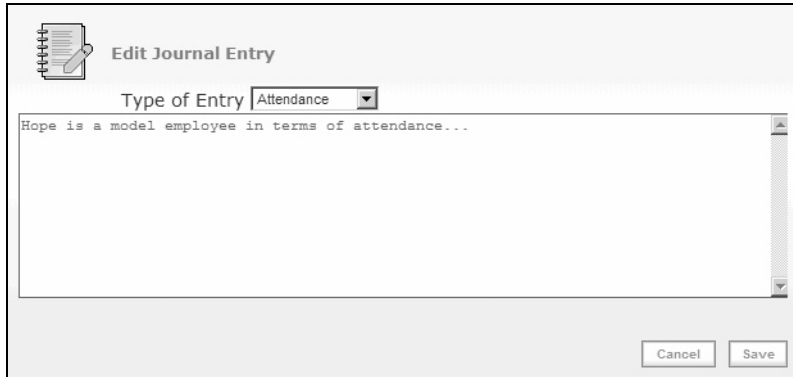
3. Click on the Journal entry you want to edit.



Previous entries Sort Options

Attendance - 11/8/2010 10:31 AM -05:00 Hope is a model employee in terms of attendance...	
--	---

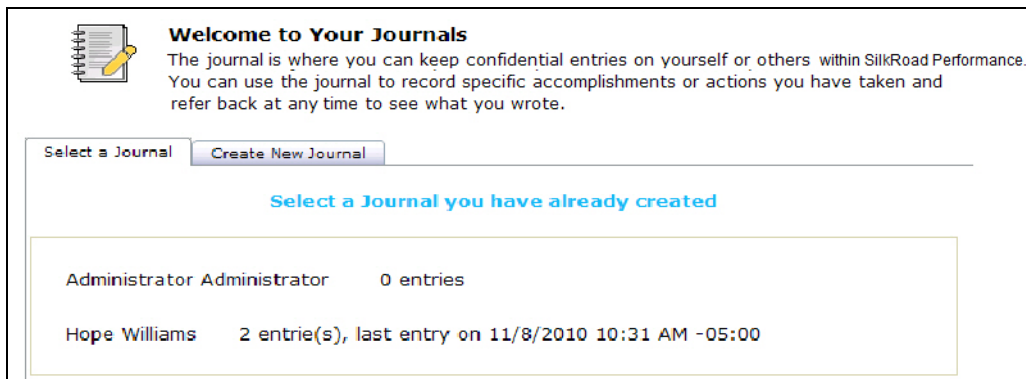
4. Make changes to the journal entry and click **Save**.



## Delete a journal entry

Follow these steps to delete a journal entry.

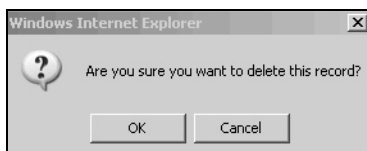
1. From the Navigation bar under Journal, select My Journals.
2. Select the Journal you want to edit by clicking on the employee's name.



3. Click  next to the journal entry you want to delete.



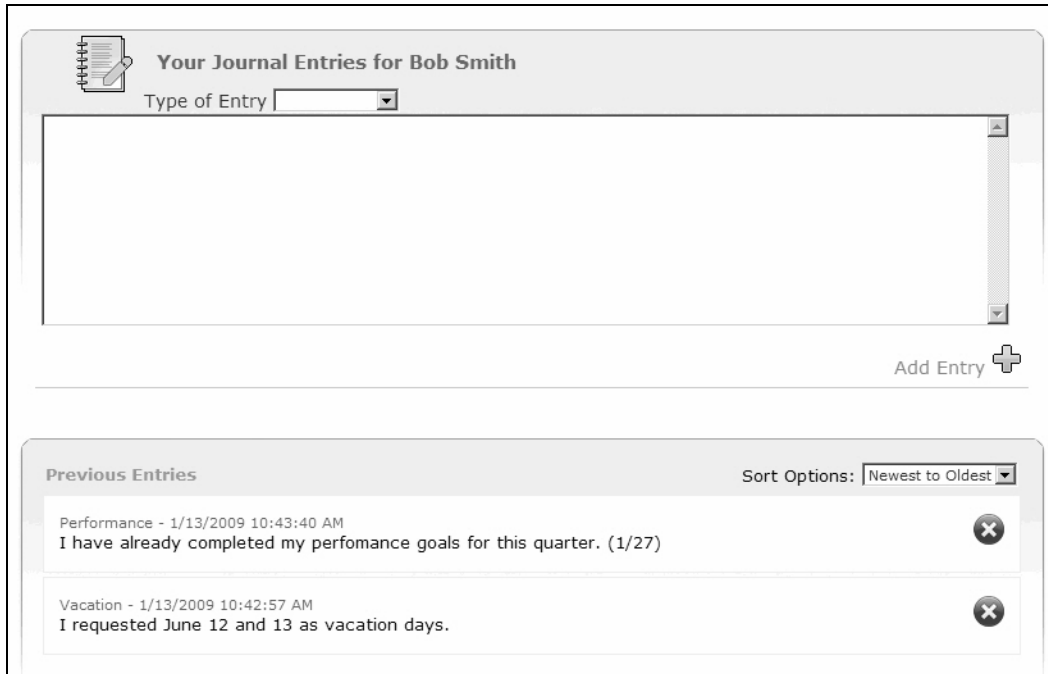
4. Confirm deletion by clicking **OK**.



## Personal Journal

The Personal Journal screen provides a dashboard for viewing and managing journal entries that you create about yourself. Here you can view previous entries, sort entries, add an entry and delete entries.

Click on **Personal Journal** from the Navigation bar under Journal to access this screen.



**Your Journal Entries for Bob Smith**

Type of Entry

Add Entry +

**Previous Entries** Sort Options:

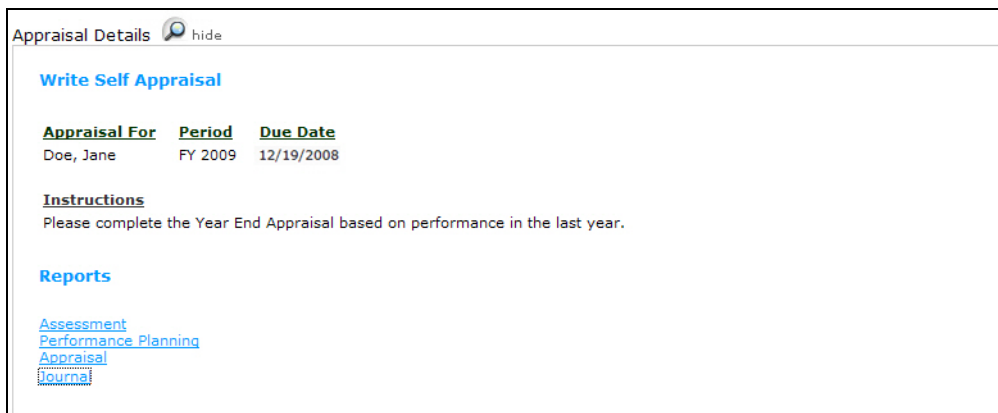
Performance - 1/13/2009 10:43:40 AM  
I have already completed my performance goals for this quarter. (1/27)


Vacation - 1/13/2009 10:42:57 AM  
I requested June 12 and 13 as vacation days.

## View the journal in an appraisal

When an employee or manager is writing an appraisal, they can view journal entries they have written in a separate window by selecting the Journal link in the Appraisal Details screen.

To view the Journal, on the Appraisals Details page, click the **Journal** link (under the instructions) in the appraisal.



**Appraisal Details**  hide

[Write Self Appraisal](#)

Appraisal For	Period	Due Date
Doe, Jane	FY 2009	12/19/2008

**Instructions**  
Please complete the Year End Appraisal based on performance in the last year.

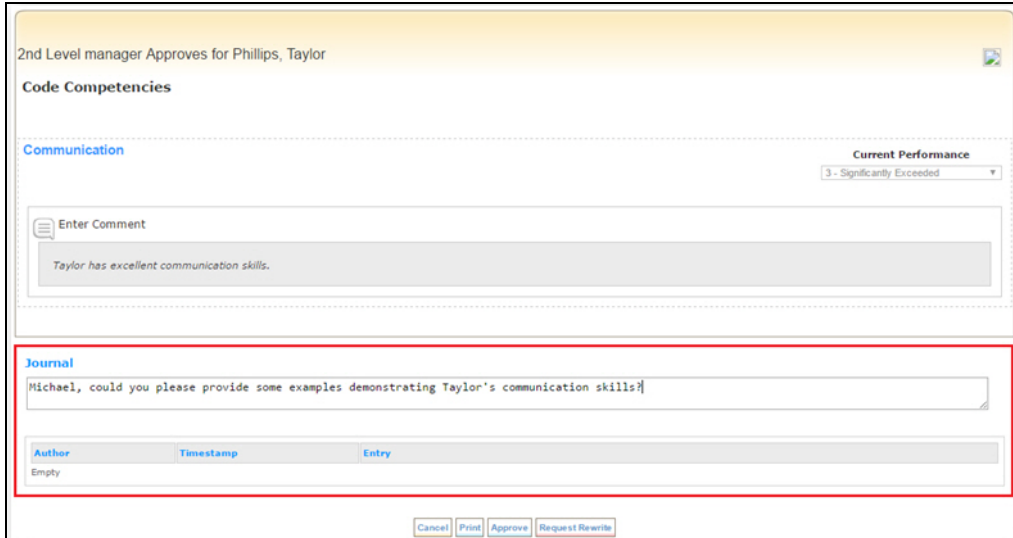
**Reports**

[Assessment](#)  
[Performance Planning](#)  
[Appraisal](#)  
[Journal](#)



## Journal comments viewable during appraisal

During an appraisal process, the comments viewable in the Journal for the Read Appraisal step are now limited to those comments entered since the start of the step.



2nd Level manager Approves for Phillips, Taylor

**Code Competencies**

**Communication**

Current Performance: 3 - Significantly Exceeded

Enter Comment

Taylor has excellent communication skills.

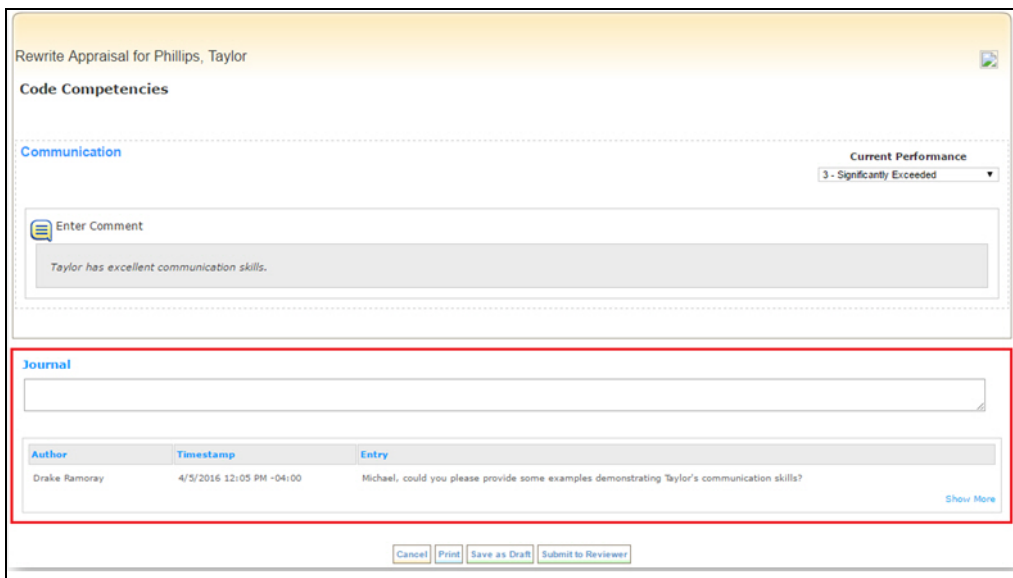
**Journal**

Michael, could you please provide some examples demonstrating Taylor's communication skills?

Author	Timestamp	Entry
Empty		

Buttons: Cancel, Print, Approve, Request Rewrite

If during the Read Appraisal step a rewrite is requested, the comments viewable in Rewrite Appraisal step also are limited to those comments entered since the start of the approval cycle.



Rewrite Appraisal for Phillips, Taylor

**Code Competencies**

**Communication**

Current Performance: 3 - Significantly Exceeded

Enter Comment

Taylor has excellent communication skills.

**Journal**

Michael, could you please provide some examples demonstrating Taylor's communication skills?

Author	Timestamp	Entry
Drake Ramoray	4/5/2016 12:05 PM -04:00	Michael, could you please provide some examples demonstrating Taylor's communication skills?

Buttons: Cancel, Print, Save as Draft, Submit to Reviewer

After a Read Appraisal step is completed, the comments viewable in the Journal are limited to those entered by the employee viewing the Journal.

# Organization chart


In this section

Organization chart overview .....72

## Organization chart overview



The Organization chart is a diagram that shows the structure of an organization. It graphically illustrates the hierarchical relationship between people within an organization and is based on SilkRoad Performance direct manager relationship structure.

You access the Organization chart from the My Team icon on your home page. The initial view varies depending on your role. If you are a direct manager, you see yourself along with your direct reports. If you have more than four direct reports, you can click  to see more of your direct reports. A list of your direct reports appears and you can scroll up and down or search:



## Navigation



Click to move up one level at a time in the organization chart.



Click to move down one level at a time in the organization chart.

[First](#) [Previous](#) [Next](#) [Last](#)

Click to move to the first, previous, next, or last page in search results list.

## Other features



Click to search for an employee on the organization chart.



Click to see more of your direct reports.




Click to view an employee's profile. You can only view an employee's profile if permissions allow.



Click to access your journal for this employee. You can only access the journal if permissions allow.

## View yourself on the organization chart




- On the Home page, click .

The organization chart appears and shows where you appear in your organization's hierarchy.

## View an employee on the organization chart





- On the Home page, click .

The organization chart appears and shows where you appear in your organization's hierarchy.

- Search for an employee** (page 74).


The employee appears on the organization chart.

- If permissions allow, you can:


- Click  to view the employee's profile
- Click  to access your journal for the employee

## Search for an employee on the organization chart



- On the Home page, click .

The organization chart appears and shows where you appear in your organization's hierarchy.

- Click .
- In the Name box, enter the name or part of the employee's name, and click **Search**.  
A results list appears.
- In the results list, click the employee.

The organization chart redisplay and shows the employee.

## Appendix A—Frequently Asked Questions (FAQ's)

*What are the appraisal ratings and what do they mean?* (on page 75)

*What should I put in the Results & Accomplishments section?* (on page 76)

*The appraisal has competencies that I don't perform in my job. What should I do?* (on page 76)

*There are competencies that I perform on a regular basis not included on my appraisal. How can I address those?* (on page 76)

*How does the system work?* (on page 76)

*How many steps are in the Appraisal process?* (on page 77)

*I am having difficulty with my user name and/or password?* (on page 77)

*My title (or other profile information) is incorrect on my appraisal. How can I correct my profile information?* (on page 78)

*Can I change the date my appraisal is due?* (on page 78)

*How can I get a copy of my final appraisal?* (on page 78)

### What are the appraisal ratings and what do they mean?

This is an example of an appraisal rating scale. Your company's rating scale may be different from this example.

#### 5—Exemplary

Performance is clearly distinguished; reflects superior effort and exceptional results and is evident by others.

#### 4—Very Competent

Performance consistently meets and often significantly exceeds established expectations. Performance reflects a high degree of initiative and high quality results.

#### 3—Competent

Performance consistently meets all job standards and expectations. Solid, all-around performance.

## **2—Needs Development**

Performance may meet some, but does not consistently meet established job standards. Individual requires counsel, guidance and supervision. Performance improvement is necessary to demonstrate initiative and to attain competency in key areas of current position. Action plan for improvement is mandatory. (contact HR)

### **1—Must be Improved**

Performance in key areas is at an unacceptable level. Performance improvement must be achieved to justify retention in position. Action plan for improvement is mandatory. (contact HR)

## **What should I put in the Results & Accomplishments section?**

The purpose of this section is to identify key results or accomplishments performed during the review period. Comments should address those areas where results exceeded, met or did not satisfactorily meet requirements.

## **The appraisal has competencies that I don't perform in my job. What should I do?**

You will still need to assign a rating and then address your concerns in the comments section and discuss during the appraisal meeting with your manager.

## **There are competencies that I perform on a regular basis not included on my appraisal. How can I address those?**

Make sure to address these at the bottom section "Overall Summary" and discuss them with your manager during the appraisal meeting.

## **How does the system work?**

The system is very easy to use:

- You will receive an email notifying you of a task to complete with a URL link, your User Name and Password. Please print this email for your records.
- Click the link in the email. It is important to remember that SilkRoad Performance requires Windows Internet Explorer 6.0 or higher or Firefox 3.6.3 or higher.
- At the SilkRoad Performance login page type in your User ID and Password.
- You will be directed to your dashboard that summarizes which tasks you have yet to complete.

- Click on the task and follow the instructions.
- Make sure to read the instructions at the top of the page before beginning each step.

## How many steps are in the appraisal process?

The number of steps in the process depends on how appraisals are configured for your company. A common configuration includes 5 steps in the process but based on your role and/or department you might not participate in each step:

1. **Write Appraisal**—The associate self-appraisal is the first step in the process. The associate will receive an email to write his/her self-appraisal. Once complete the associate will submit to his/her manager.
2. **Manager Writes Appraisal**—Once the associate completes the self-appraisal, the manager will receive an email to write the associate's appraisal. The manager will be able to view the associate's comments and ratings. When the appraisal is submitted by the direct manager, if the Next Level Manager requests to review these appraisals, it will go onto Step 3, Next Level Manager Reviews Appraisal. Otherwise, after the direct manager has submitted the appraisal it will go onto Step 4, Manage Meeting.
3. **Next Level Manager Reviews Appraisal**—When the manager completes the associate's appraisal, the next level manager will receive an email notifying him/her that he/she needs to review the appraisal. The next level manager either Approves or Requests a Rewrite of the appraisal. If approved, the appraisal will go onto step 4, Manager Meeting. Otherwise, if a rewrite is requested, the manager will receive an email with comments and a request for a rewrite. The manager will need to re-submit the appraisal again for approval.
4. **Manage Meeting**—Once the appraisal is submitted by the direct manager and/or approved by the next level manager, a meeting will be set-up with the associate to review the appraisal. Once this meeting takes place, the manager will login to SilkRoad Performance and complete the "Manage Meeting" task confirming the date of the meeting, who was in attendance, and sign off on the appraisal.
5. **Acknowledge Meeting**—Once the manager has confirmed the meeting date and signed off on the final appraisal, the associate will receive an email to acknowledge the date of the meeting and that he/she is in agreement with the final appraisal. Once this step is complete the appraisal is closed.

## I am having difficulty with my user name and/or password?

You should contact your System Administrator for any information on your User Name, Password or for any other questions not answered in this FAQ.

## **My title (or other profile information) is incorrect on my appraisal. How can I correct my profile information?**

If your title (or other information) is incorrect you should bring this to the attention of your manager in your meeting.

## **Can I change the date my appraisal is due?**

No. You will receive reminder emails notifying you of tasks that are past due. It is your responsibility to make every effort to complete the appraisal process in a timely fashion.

## **How can I get a copy of my final appraisal?**

1. Navigate to [https://humanasset.net/\(your company name\)/](https://humanasset.net/(your company name)/)
2. Log in using your User ID and Password. Your User ID and Password are provided to you by your internal SilkRoad Performance Client Administrator.
3. Click **Login**.
4. On the left navigation bar, select Appraisals under the menu option Reports.
5. Click the link to the report you want and follow the instructions.



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# Glossary

## **Aggregate Reports**

SilkRoad Performance offers three report options once the assessments are complete and closed including Assessment Summary, Assessment Detail and Strengths & Room for Improvement.

## **Appraisals**

A module in SilkRoad Performance designed to provide managers and employees a way to measure skills and accomplishments with reasonable accuracy and uniformity.

## **Assessee**

The person who is being assessed.

## **Assessments**

A module in SilkRoad Performance by which an individual's job performance is scored and assessed. The assessment process may include both internal and external participants.

## **Assessor**

The person creating the assessment. Assessors may be internal or external participants who can evaluate the assessee's skills and abilities as they pertain to job responsibility and requirements.

## **Cache**

A block of high speed memory where data is copied when it is retrieved from the RAM.

## **Calculate Rollup Scores**

During an appraisal, you may choose to calculate the rollup scores. The rollup scores provide you with the overall appraisal score without having to save the ratings you have selected.

## **Comment Sections**

Used throughout the appraisal and assessment forms to allow you to add additional information to support rating or include general information. You may enter text or copy and paste from documents and email.

## **Compliance Checker**

When enabled, Compliance Checker allows you to automatically check for non-compliant words or phrases. Compliance checker is available for use in appraisals, assessments and the employee journal.

## **Content Management**

SilkRoad Performance uses Library Builder and Profile Builder, window application tools, to create and manipulate Voyager content. Library Builder is used to create and organize the content for assessments, appraisals and surveys. Profile Builder is then used to take that content and assign rules to determine how it appears to the end user on the page.

## **Development Planning**

A module in SilkRoad Performance that allows employees to create and manage plans of activities they want to accomplish throughout a plan period.

## **Due Date**

The date the task is required to be complete. Due dates turn from green to red as tasks become overdue.

## **Email Notifications**

System generated emails are sent throughout the various planning stages to inform you of new tasks and keep you updated through the process.

## **Employee Role**

Refers to the employee either completing the task or having the task completed for his or her benefit.

## **EPM**

Employee Performance Management (EPM) application.

## **Goals**

Specific objectives or targets for a period of time.

## **Journal**

A text field that you can add detailed information about your task and view document details that are automatically generated (such as approval status).

## **Localization**

With the release of SilkRoad Performance version 7.080, localization is now supported. With this feature, users can view and interact with SilkRoad Performance in their native language.

## **Manager Role**

Refers to the employee's direct manager.

## **Module**

SilkRoad Performance has four available modules including Assessments, Appraisals, Performance Goal Planning and Performance Development. Each module can operate separately or together as an integrated employee performance management solution. Each module is color coded for easy identification. Assessment tasks are Orange, Appraisal tasks are gray and Performance Planning tasks are green.

## **My Profile**

Located on your Home page, your profile includes personal and employment details. All updates to your profile are made by your administrator.

## **My To Do list**

Located on your Home page, your To Do list includes tasks that you are responsible for completing along with the associated due dates and status.

## **Narratives**

Narratives provide instructions and prompts displayed within SilkRoad Performance.

## **Navigation Bar**

A menu of links located on the left side of the screen, which allows access into the various planning stages.

## **Next Level Manager Role**

Refers to the Manager above the Direct Manager.

## **Password**

Your password is system generated. You may change your password after login by clicking on Change Password on the Navigation bar.

## **Performance Planning—Goals**

A module in SilkRoad Performance allows employees to create, define and manage specific goals and objectives throughout a plan period. A goal is also known as a Performance Objective.

## **Rating Scale**

Each assessment and appraisal has a corresponding rating scale with complete description to gauge behavior and/or competency for each task.

## **SPA**

Succession Planning Administrator (SPA)

### **Spell Check**

SilkRoad Performance offers you the option to use spell check which automatically checks for spelling errors.

### **SSO**

Single Sign-On

### **Status**

The status of a task helps you track your progress throughout the process.

### **Succession Planning**

A module in SilkRoad Performance that allows Succession Planning Administrators to create and manage succession plans and evaluate incumbents and candidates using the Comparison Matrix.

### **Supported Browsers**

The browsers on which SilkRoad Performance is supported.

### **Trigger Options**

A term used to describe specific scenarios when emails are sent. The Client Administrator can choose to send emails when specific actions are met.

### **User ID**

Your User ID is system generated and given to you along with a Password by your Administrator.

### **Welcome Screen**

The front page of SilkRoad Performance, also known as, your Home page.

### **Writing Assistant**

Writing assistant provides suggested phrases and for use in appraisals and assessments which can be enabled or disabled based on your preferences. SilkRoad Performance contains a generic Library with one Model, one Cluster and 40 Competencies with behaviors which can be mapped and then assigned. There are also 40 unique Writing Assistant Phrase Libraries comprised of varying Reasons and six toned-phrases per Reason.