

Colorado State University

Human Resource Management System User Guide

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Unit 9: Performance Evaluation Module

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General Information

Performance evaluation batches are created automatically. Completed lines in a batch will be picked up daily. When all lines have been transferred from the batch, the batch itself will be removed.

Performance evaluation batches do not need to be validated before they can be picked up.

Planning Evaluations

When a state classified employee is hired or transferred to a department within Colorado State University, a performance planning batch is created automatically. The review date should occur within one month of the employee's hire or transfer date.

1. From the navigator screen, open CSU Performance Eval.
2. Open the planning batch to be completed.

Employee Name	Asg. No.	Review Date	Rating	Complete	Job Title	Supervisor	Start Date
B	17700-2			<input type="checkbox"/>	Accounting Technicia		01-NOV-2003
				<input type="checkbox"/>			
				<input type="checkbox"/>			

3. The Review Type: field in the heading indicates the batch due date and type.
4. Enter the date on which the review was conducted in the Review Date field.
5. Check the Complete checkbox.
6. Save your work and close the screen.
7. Completed lines in the batch are picked up daily.

Mid-Year Evaluations

Each October 1, a mid-year evaluation batch is created for each department and includes all its active state classified employees.

1. From the navigator screen, open CSU Performance Eval.
2. Open the mid-year batch.



3. The Review Type: field in the heading indicates the batch due date and type.
4. Enter the date on which the review was conducted in the Review Date field.
5. Check the Complete checkbox.
6. Save your work and close the screen.
7. Completed lines in the batch are picked up daily.

Final Evaluations

Each March 31, a final evaluation batch is created for each department and includes all its active state classified employees hired before Jan 1 of the current year.

1. From the navigator screen, open CSU Performance Eval.
2. Open the final evaluation batch to be completed.

Employee Name	Asg. No.	Review Date	Rating	Complete	Job Title	Supervisor	Start Date
B	15452			<input type="checkbox"/>	Equipment Operator II		07-JUL-2003
B	17700.2			<input type="checkbox"/>	Accounting Technicia		01-NOV-2003
D	26181			<input type="checkbox"/>	Equipment Operator I		06-SEP-2005
W	24620			<input type="checkbox"/>	IT Professional II		05-JUL-2005

3. The Review Type: field in the heading indicates the batch due date and type.
4. Enter the date on which the review was conducted in the Review Date field.
5. Enter the Rating as assigned by the supervisor.
6. Check the Complete checkbox.
7. Save your work and close the screen.
8. Completed lines in the batch are picked up daily.

Using the Export/Import Function

In order to simplify the entry of evaluation data, the HR system provides an import function that allows you to perform data entry outside of the HR system and to divide data entry among more than one person.

Exporting

Exporting the empty performance batch from the HR system creates a template for entering the required data.

1. From the navigator screen, open CSU Performance Eval Entry.
2. If given a list, select the final evaluation batch.
3. Click File -> Export.
4. All lines of data will be exported to Microsoft Excel.
5. Close CSU Performance Eval Entry.
6. Save the file in CSV (comma delimited) format.
7. The data may be sorted in Excel as needed.

Entering Performance Data

Enter the review data in the spreadsheet created by the Export function above.

1. For Planning and Mid-Year batches, a date should be entered only in the first empty column (C).

For Final batches, the first two empty columns will be used: column C for the review date and column D for the rating.

2. The date must be formatted in one of the following ways, using two digits for the day:

01-May-07

05/01/07

This error message “ORA-01858: a non-numeric character was found where a numeric was expected” indicates that an incorrect date format was used. Ensure that two numerals are used to indicate the day (ie, 03 instead of 3).

3. The Complete checkbox will be marked automatically when a line is successfully imported.

Importing

The HR system is flexible in importing data. You may upload all lines at once or in small groups.

1. Open the spreadsheet into which you've been entering evaluation data.
2. Ensure that the file is in CSV (comma delimited) format by clicking File -> Save As...
3. If the Save as type... field indicates CSV (comma delimited), then the correct format has already been selected. Click Cancel on the Save screen.

If the Save as type... field indicates anything else, select CSV (comma delimited) and save the file.

4. When asked if you want to keep the workbook in this format, click Yes.
5. In the HR system, open CSU Performance Eval Entry.
6. Click the Import button.
7. For now, disregard the Decision window that appears. We'll return to this later.
8. A new browser window (Oracle: Upload a File) will open.
9. In this window, click the Browse button and locate your data file, ensuring that you select the .csv file.
10. When the correct filename appears in the File field of the browser window, click OK.

11. When you receive the message “File Upload Completed Successfully”, close the browser window and return to the HR system.
12. Now, click OK in the Decision window which asks “Has the file been uploaded successfully?”.
13. You’ll next be given a summary of import actions. Click OK.

If you received any errors, click the Import Errors button to view them.

14. Once the data file has been corrected according to the errors listed, return to step 1 above to import the data again.
15. When the data imports successfully, close the CSU Performance Eval Entry screen. Any lines which have been completed will be picked up within the next day.

Populating the Supervisor Field

In larger departments, it may be helpful to categorize employees by their supervisor. The performance batches pull this data from the Special Information -> Supervisor field.

This information may be added to the batch at any time using the following process.

1. From the navigator screen, open CSU Maintain Person.
2. In the Find Person window, look up the employee whose supervisor you’d like to enter.
3. At the bottom of the People screen, click the Special Info button.
4. In the Special Info Table, scroll down to Supervisor.
5. Click in the Start Date field in the Details block.
6. Enter a Start Date which is the same as the date on the performance evaluation batch or earlier.
7. Tab to the Detail field and press Ctrl-L.
8. In the Emp Assgn Number field, press Ctrl-L. If the employee has more than one assignment, choose the active State Classified assignment that belongs to your department.
9. In the Supervisor field, type in the supervisor’s last name and press Tab.
10. If a list of values opens, select the correct person from the list.

11. The Supervisor Employee Number populates automatically.

The screenshot shows a window titled 'Special Information (Barlow, David L)'. It has two main sections: 'Information' and 'Details'.

Information Section:

Name	Exists
Licenses and Certification	<input type="checkbox"/>
State Classified Information	<input checked="" type="checkbox"/>
Supervisor	<input checked="" type="checkbox"/>
Tenure Information (Faculty)	<input type="checkbox"/>

Details Section:

Start Date	End Date	Detail
30-MAR-2007		15452.Berger, Brad.17700

A 'Supervisor' dialog box is open over the 'Details' section, showing the following fields:

- Emp Assgn Number: 15452
- Supervisor: Berger, Brad
- Supervisor Employee Number: 17700

Buttons at the bottom: OK, Cancel, Clear, Help.

12. Click OK.

13. Save your work and close the Special Info Table.

14. When you return to CSU Performance Eval Entry, the new supervisor information will appear in the Supervisor column.

15. If the supervisor does not display, note the date in the Review Type: field of the batch and return to step 1.

Confirm that an appropriate date was entered in step 6 and that the correct assignment number was chosen in step 8.

Review Due Date Discrepancies

In a few cases an employee's planning batch will have a due date that coincides with the mid-year or final batch. Oracle is unable to store data for more than one review. When this happens, the due date on one of the batches will be shifted by one day.