

Workflow for XPages End of Year Review

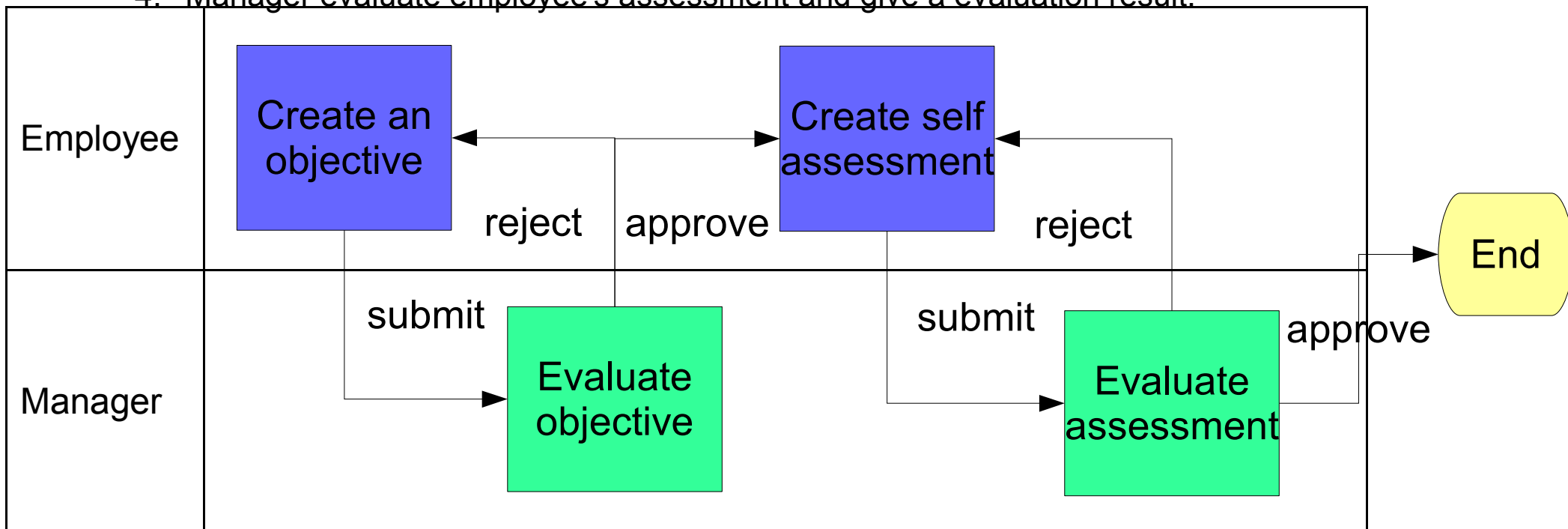
Agenda

- Introduce to sample application
- Guide to setup sample application
- How to run sample application

Introduction to the Sample Application

The sample application is called: End of Year Review. It is an application to help evaluating employee's work in a year. It demos how to use **SimpleWorkflow control**. It contains the following workflow:

1. At the beginning of year, employee create an objective for a year
2. Manager approve/reject employee's objective
3. At the end of a year, employee create a self assessment for the year
4. Manager evaluate employee's assessment and give a evaluation result.



Guide to Setup Sample App

1. Install XPage Extension Library first;
2. Unzip the release zip file and install the update site under updatesite folder to Domino.
3. Copy the Sample NSF(EmployeeReview.nsf) to domino data folder. The default user has manager authority, please change access control if needed.
4. Sign the design elements
5. Access Admin Page ("<http://yourDominoServer/EmployeeReview.nsf/WebAdmin.xsp>"), input 3 Notes users in your Domino server, press "Create Sample data set" button to generate sample data, including Employee Data and Review Data(These three users will be added to the demo workflow system).
6. If you want to create more employee, you can create them with Employee form in Notes client(see explanation of Employee field in page 6).

Guide to Setup Sample App(cont)

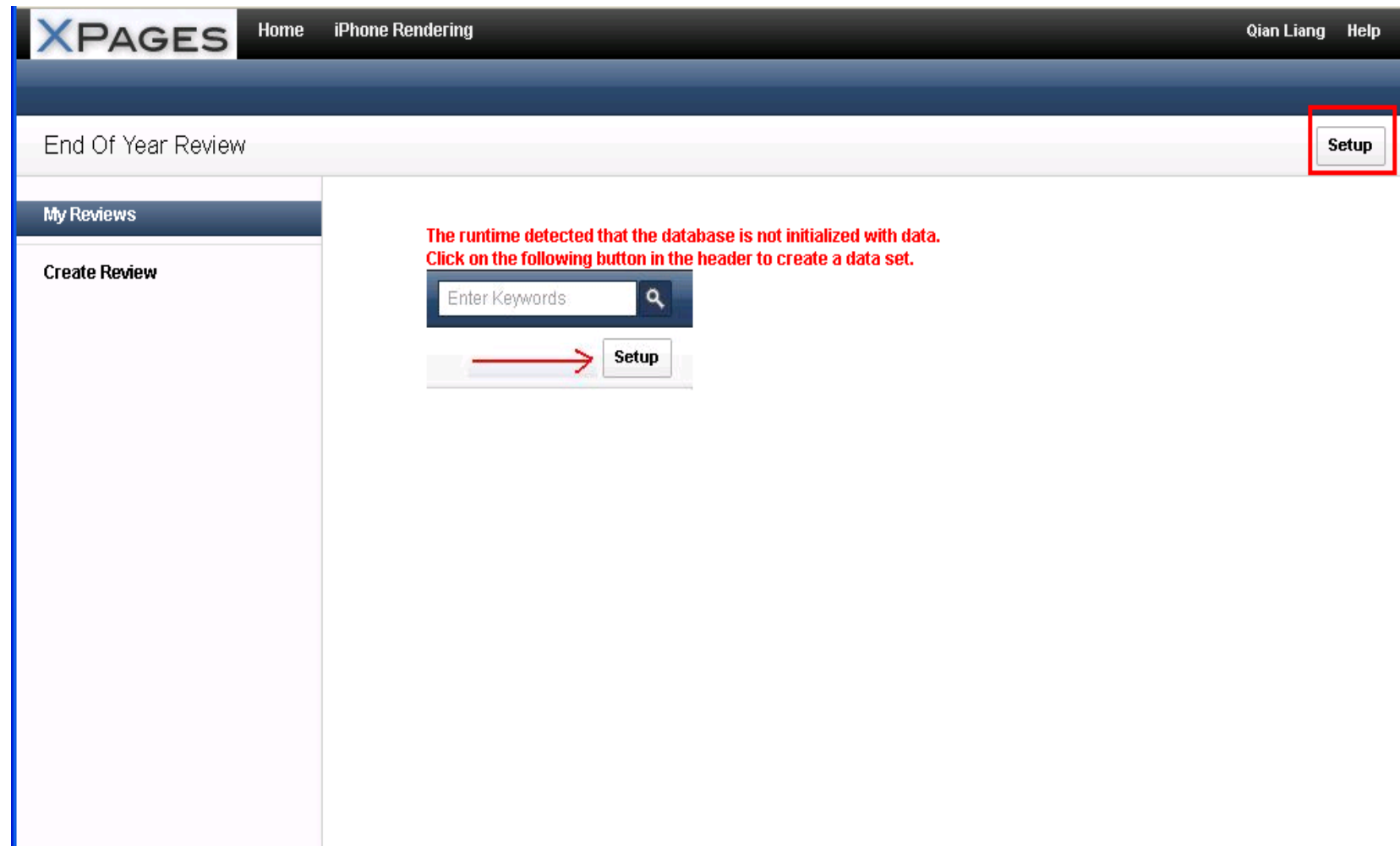
7. The Navigation List on Admin Page(Home page) has entries to access “Create Review”, “WebMyReviews.xsp”, “WebMyEmployees.xsp”, “WebMyTodo.xsp”,
 - in “WebMyReviews.xsp” page, user can choose one employee to view his/her review process, if the review process is not finished, you can edit it.
 - in “WebMyEmployees.xsp” page, manager can view all the review process in the tree structure of Manager and his/her managed people, if the review process is not finished, you can edit it. (Only manager or XFlow_admin role can view this page)
8. In “WebEditReview.xsp”, you can see the sample usage of “xe:simpleWorkflow”. We can define a simple workflow with it.

Employee Form

Employee Data		
ID:	<input type="text" value="simdray@renovations.com"/>	ID to identify user in workflow system
NotesID:	<input type="text" value="Simone Dray/Renovations"/>	Corresponding Notes ID for workflow user
Full Name:	<input type="text" value="Simone Dray"/>	
Manager	<input type="text" value="0"/>	0 if Employee 1 if Manager
Picture URL	<input type="text" value="/simdray.jpg"/>	
Managers Chain		
	<input type="text" value="graynes@renovations.com"/> <input type="text" value="dmissille@renovations.com, graynes@renovations.com"/>	User's manager id User's second line manager id and user's manager id
People Managed		
	<input type="text" value=""/>	All managed people ids, separated with comma.
User Preferences		
Use of River of News:	<input type="text" value=""/>	0 to not use it 1 to use it

How to Run the Sample Application

1.Login the sample application with an admin user(with Manager authority), and press "Setup" button



How to Run the Sample Application

2. In setup page, input 3 valid Notes Ids of your Domino server: one for employee, one for first line manager, one for second line manager. Click "Create Sample Data Set" will generate sample data for you.

End Of Year Review

Setup

My Reviews

Create Review

Data Initialization

List of Employees

Current User

Demo Purposes - Create a sample dataset to experiment the application features (users, reviews...)

Add sample users

The following Notes users will be added to the workflow system. And some sample End of Year Review will be created for those users. After generating sample data, you can logon with normal user to view/submit End of Year Review. And the manager can assess/approve the review. To add more user to workflow system, you can open the db with Notes and create Employee.

*Employee:

*First line manager:

*Second line manager:

Create Sample Data Set

Recreate the reviews only

Delete All Sample Data

8

How to Run the Sample Application


3.Login with employee Notes Id. In "My Reviews", you will see 3 years' reviews. For current year, if it is still in "Objectives to be submitted", you can click on "Edit".

End Of Year Review


Setup

My Reviews


Create Review


test1 liang

2012
Objectives to be submitted
[Edit](#)


test1 liang

2011
Evaluation Approved
[View](#)


test1 liang

2010
Evaluation Approved
[View](#)

How to Run the Sample Application

4.The employee can input this year's objective and submit it.

End Of Year Review

My Reviews

Create Review

test1 liang

Objectives to be submitted

Year: 2012






























Employee: test1 liang











































Manager: test4 liang

Objectives:

Font

Size

Objectives

Comments:

Assessment:

Employee

Assessment

Comments:

Manager

Assesment:

Evaluation:

Submit Objectives

Save

10

How to Run the Sample Application

5.Login as first line manager id and in the "Pending Tasks" view, you can see all current tasks including the Objective submitted by previous employee. You can click "Edit" view detail information of the objective.

End Of Year Review

Setup


My Reviews

My Employees

Pending Tasks

Create Review


Previous 1 Next



Objectives submitted - Waiting for approval

Edit


test1 liang



Assessment submitted - Waiting for evaluation

Edit


Mike Motler



Assessment submitted - Waiting for evaluation

Edit


Ron Espinosa



Assessment submitted - Waiting for evaluation

Edit

Simone Dray



Assessment submitted - Waiting for evaluation

Edit

Vijay Nehry

How to Run the Sample Application

6. As manager, you can input objective comments and Approve/Reject employee's objective. Once approved, the document will return to employee to input assessment.

End Of Year Review Setup

My Reviews

My Employees

Pending Tasks

Create Review

test1 liang
Objectives submitted - Waiting for approval

Year: 2012

Employee: test1 liang

Manager: test4 liang

Objectives: This is a sample objective.

Objectives Comments:

Font Size [Rich Text Editor Icons]

Good objective

Press ALT 0 for help

Assessment:

Employee Assessment Comments:

Manager Assessment:

Evaluation:

Approve **Reject** **Save**

How to Run the Sample Application

7.Login as employee and input self assessment and submit.

End Of Year Review

Setup

My Reviews

Create Review

test1 liang

Assessment to be submitted by the employee

Year: 2012

Employee: test1 liang

Manager: test4 liang

Objectives: This is a sample objective.

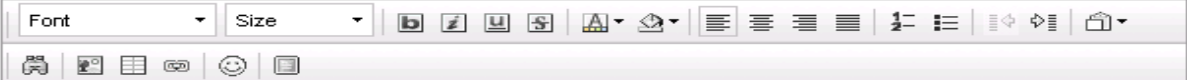
Objectives Comments: Good objective

Assessment:

Employee Assessment Comments:

Font

Size



Achived objective successfully

Press ALT 0 for help

Manager Assesment:

Evaluation:

Submit Assessment

Save

How to Run the Sample Application

8. Login as first line manager, you can find employee's assessment in "Pending Tasks". You can input manager assessment and select a evaluation result.

End Of Year Review Setup

My Reviews

My Employees

Pending Tasks

Create Review

test1 liang
Assessment submitted - Waiting for evaluation

Year: 2012

Employee: test1 liang

Manager: test4 liang

Objectives: This is a sample objective.

Objectives Comments: Good objective

Assessment:

Employee Assessment Comments: Achived objective successfully

Manager Assesment:

Good performer!

Press ALT 0 for help

Evaluation: A+ ▼

Approve **Reject** **Save**

How to Run the Sample Application

9.As first line manager, you can also view all employees' reviews in "My Employees" view.

End Of Year Review

Setup

My Reviews

My Employees






Pending Tasks

Create Review

Collapse All

Expand All

Previous 1 Next

	State
 2012: test1 liang	Assessment submitted - Waiting for evaluation
 2012: Mike Motler	Assessment submitted - Waiting for evaluation
 2012: Ron Espinosa	Assessment submitted - Waiting for evaluation
 2012: Simone Dray	Assessment submitted - Waiting for evaluation
 2012: Vijay Nehry	Assessment submitted - Waiting for evaluation

Show

10

25


50

All

items per page

Backup

Demo app snapshot: Admin page to create sample data


[Home](#)
[iPhone Rendering](#)
[Qian Liang](#)
[Help](#)

End Of Year Review [Setup](#)

[My Reviews](#)
[My Employees](#)
[Pending Tasks](#)
[Create Review](#)


[Data Initialization](#)
[List of Employees](#)
[Current User](#)

Demo Purposes - Create a sample dataset to experiment the application features (users, reviews...)


Add sample users

The following Notes users will be added to the workflow system. And some sample End of Year Review will be created for those users. After generating sample data, you can logon with normal user to view/submit End of Year Review. And the manager can assess/approve the review. To add more user to workflow system, you can open the db with Notes and create Employee.


*Employee:



*First line manager:



*Second line manager:




Create Sample Data Set

Recreate the reviews only

Delete All Sample Data

Demo app snapshot: employee creates "End of Year Review"


Home iPhone Rendering
test1 liang Help

End Of Year Review
Setup

My Reviews
Create Review

Objectives to be submitted

Year:



Employee: test1 liang





Manager: Test2 Liang





Objectives:


Font Size







B *I* U ~~S~~











Objectives

Comments:

Press ALT 0 for help

Demo app snapshot: manager list all employee's "End of Year Review"



[Home](#)
[iPhone Rendering](#)

[Qian Liang](#)
[Help](#)

End Of Year Review

Setup

My Reviews

My Employees










Pending Tasks

Create Review

Collapse All

Expand All

Previous 1 Next

	State
 <div> <div>▼</div> <div>2012: test4 liang</div> </div>	Objectives submitted - Waiting for approval
 <div>2012: test1 liang</div>	Assessment submitted - Waiting for evaluation
 <div>2012: Mike Motler</div>	Assessment to be submitted by the employee
 <div>2012: Ron Espinosa</div>	Objectives to be submitted
 <div>2012: Simone Dray</div>	Objectives submitted - Waiting for approval
 <div>2012: Vijay Nehry</div>	Objectives submitted - Waiting for approval
 <div>2012: Kelly Hardart</div>	Assessment to be submitted by the employee
 <div>▶ 2012: Lucille Suarez</div>	Evaluation Approved
 <div>▶ 2012: Ted Amado</div>	Objectives submitted - Waiting for approval

Show

10

25

50

All

items per page