# HR Administrator User Guide

## HR Administrator Access

HR Administrator Access will be granted by the Performance Development Platform team for an authorized area such as an entire organization or any subset of business units within the organization. Access will be provided at the lowest organizational level possible that still enables an individual to fulfill their role and accomplish designated tasks.

Within their authorized area, HR Administrators will be able to:

- View basic employee data and reporting relationships.
- Update shared supervisor relationships in the PDP.
- Edit the excused status of employees in the PDP.
- Run reports and export excel files that show number and type of active goals created as well as the number, type, and due dates of conversations captured in the PDP.

HR Administrators will NOT be able to:

- Access individual user profiles (other than their own).
- See the content of goals, comments, or conversations for any employee (other than themselves).

## My Organization

The My Organization tab can be helpful to answer basic questions (i.e. when is a user's next conversation due?) and to troubleshoot issues that arise (i.e. is a PeopleSoft request required to update incorrect job data or reporting relationships for a user?).

The My Organization area contains data for all employees within the HR Administrator's authorized access, including:

- Employee ID, name, reporting relationship, classification, organization, and department ID.
    - This information is updated from PeopleSoft once per day. It could take up to 48 hours for changes made in PeopleSoft to be reflected here.
- Number of active goals.
    - This is updated in real time. For more information about the type (work, learning, career development) or topic (sorted by goal tag) refer to the Statistics and Reporting > Goal Summary page.
- Due date for next conversation.
    - This is updated once per day. It may take up to 24 hours for this date to recalculate once an employee and supervisor have signed a conversation.
- Shared status.
    - The values are "Yes" to indicate the employee has been shared and "No" to indicate the employee has not been shared.
    - For additional details and functionality, refer to the Share Employees tab.
- Excused status.
    - The values are "No" to indicate the employee has not been excused, "Manual" to indicate that a supervisor or administrator has excused the employee from the process,

and "Auto" to indicate that the employee has been excused because of their PeopleSoft status.
  - For additional details and functionality, refer to the Excuse Employees tab.

# Share Employees

HR Administrators may share an employee's PDP profile with another supervisor or staff for a legitimate business reason. The profile should only be shared with people who normally handle employees' permanent personnel records (i.e. Public Service Agency or co-supervisors).

## Create New Shares

Step 1: Select Employee(s)

Use the search functions to find the employee(s). If you are managing the status of a single employee, you can click on the Yes/No under Share Status in the employee row to launch a pop-up modal to make the changes directly. Otherwise, select the employee(s) you want to manage and proceed to the next step.

Step 2: Select shared supervisor

Use the search functions to select who you would like to share the employee(s) with.

Step 3: Enter sharing details

Provide a brief explanation of why the profile is being shared. For example:

- Sharing profile with co-supervisor
- Sharing profile because of inaccurate data in PeopleSoft
- Sharing with hiring manager per employee request

Step 4: Click "Share" button

## View or Delete Existing Shares

Each row on this page is a separate shared relationship in the PDP. You can see details of the shared employee, the delegate supervisor, and who created the shared relationship (i.e. which supervisor or administrator).

You can search by employee or delegated supervisor to find the relationship you are looking for and view or delete as needed. This process cannot be undone (though you can create a new share if required).

# Excuse Employees

Excusing an employee will remove them from any reporting and will pause the employee's conversation deadlines. Employees will automatically be excused if 1) they are on leave or inactive status in PeopleSoft; or 2) if they are a DM, ADM, or Executive Lead covered by a different performance review process. HR Administrators should only manually excuse an employee if they are a casual employee, are on leave that is not being captured correctly in PeopleSoft, or they are a co-op student.

### Manage Excused Status

Step 1: Select Employee(s)

Use the search functions to find the employee(s). If you are managing the status of a single employee, you can click on the “No” or “Manual” under Excused in the employee row to launch a pop-up modal to make the changes directly. Otherwise, select the employee(s) you want to manage and proceed to the next step.

Note that you cannot override the status of an employee who has been excused automatically as a result of their PeopleSoft information (i.e. they are on leave or inactive status or they are a DM, ADM, or Executive Lead covered by a different performance review process).

Step 2: Select reason for excusing the employee

HR Administrators should only manually excuse an employee if they are a casual employee, are on leave that is not being captured correctly in PeopleSoft, or they are a co-op student.

Step 3: Confirm your selection

Step 4: Click “Excuse Employee(s)” button

### View Excused History

This tab lists all past instances where an employee was excused from the PDP process. It can be used to help understand and troubleshoot why an employee’s next conversation due date was paused or restarted in the past.

## Goal Bank

You can create or manage goals that will appear in your employees’ Goal Banks and can be added to their own profiles. Goals can be suggested (for example, a learning goal to help increase skill or capacity in a relevant area) or mandatory (for example, a work goal detailing a new priority that all employees are responsible for).

Employees will be notified when a new goal has been added to their Goal Bank.

### Add a New Goal to the Goal Bank

Step 1: Enter goal details

There are resources in the PDP to assist with setting goals. These can be found by clicking the “i” toggle tips throughout the screen or viewing the Resources page. For additional information on setting effective organizational goals, refer to the document *Creating Goals for the Organizational Goal Bank*.

**Please note:** if you don’t enter a “Display Name” at the bottom of step 1, your own name will be shown as the creator of the goal throughout the platform. This can be confusing for users who may not know you personally. It is suggested to add a descriptive display name such as “PSA Human Resources” or “SDPR Executive” to let employees know who has approved the goal content.

Step 2: Select audience

Business Unit Audience

Use the filter to select your organization. Click the "Generate Org Tree" button. Scroll down and select the business unit(s) from the org tree to assign the goal.

If you assign a goal to business units, the goal will appear for current and future employees of that business unit and will disappear for an employee that leaves the business unit. It stays with the business unit.

You have the option to choose “Static” or “Inherited” permissions when selecting a business unit audience. Choosing “Static” permissions means that the goal will only appear for people in the specific business unit that you select. Choosing “Inherited” permissions means that the goal will appear for that business unit and all the business units below that one in the hierarchy. With static permissions, you select every single business unit you want in the audience (multiple check marks on the screen). With inherited permissions, you select only one business at the top of the hierarchy and everything below is included (one check mark on the screen).

Static permissions are useful when you want to target a couple of business units higher in the organization without impacting any business units below. For example, perhaps you want to push a goal out to employees in a home office or headquarters but not to front-line employees that work in various business units and report into the home office. It can also be useful if you want to pick and choose specific business units from different areas of the organization.

Inherited permissions are useful when you want to make sure that you capture all employees in an organization, division, branch, etc. Inherited permissions have the advantage that they will display the goal to any business units that join your organization, division, branch in the future as long as they are underneath the original inherited level. Static permissions would need to be manually updated to capture these new additions.

For example:

Shannon is a supervisor in Corporate Services at the Public Service Agency. An HR Administrator uses the business unit audience option to assign a goal to all employees in Corporate Services. Shannon sees that goal in their Goal Bank. Three months later, Shannon takes a new position at Citizen Services. They will no longer see the original goal in their goal bank since they are no longer part of the business unit to which the goal was assigned.

Individual Audience

You can choose to assign the goal to one or more individuals based on things like name, employee ID, or supervisor status. If you assign the goal to individuals, the goal will remain in their goal bank even if their position changes in the future. It stays with the individual.

For example:

Gurpreet is a supervisor in Corporate Services at the Public Service Agency. An HR Administrator uses the individual audience option to assign a goal to all supervisors in

Corporate Services. Gurpreet sees that goal in their Goal Bank. Three months later, Gurpreet takes a new position at Citizen Services and is also no longer a supervisor. Even though their situation has changed, they will still see the original goal in their goal bank since it was assigned to them as an individual.

### Manage Goals in Goal Bank

This table lists all goals pushed to employees in your authorized area. This includes goals created by you and by other HR Administrators or System Administrators. The table shows who created the goal, when it was created, and the audience (individual or business unit). If you see a goal here, it is because the audience includes employees in your authorized area.

You are provided with this view so that you don't duplicate existing goals that might have been created by others on your team and so that you can modify or delete goals if the original author has moved to a new position.

You can edit the goal by clicking on the goal title. You can edit the individual audience by clicking on the # of employees link under the Individual Audience header and the business unit audience by clicking on the # of business units link under the Business Unit Audience header. Changes to content will be updated in employee goal banks as soon as you save the new version.

**Be very careful modifying or deleting goals that were created by other people!** Your changes will impact everyone in the audience, not just those in your authorized area. If in doubt, connect with the original goal creator to discuss before taking any action.

For example:

Edwin is an HR Administrator for all the BC Public Service Agency. Luisa is an HR Administrator for just the Corporate Services Division within the BC Public Service Agency. Edwin adds a corporate learning goal for all Public Service Agency employees. Luisa sees the goal on their Manage Goals in Goal Bank tab because the audience includes employees from the Corporate Services Division that she supports. Luisa also sees that it was created by Edwin and that the audience is much bigger than just her division. If Luisa edits the goal, those changes will show up for everyone in the Public Service Agency. Luisa should check with Edwin before making any edits!

## Statistics and Reports

The tabs in this area allow you to see basic information about employees in your authorized area including:

- The number and type of goals created.
- The number, type, and due dates of open and completed conversations.
- The shared status of employees.
- The excused status of employees.

Note that the goals, conversations, and shared status reports do not include any employees that have been excused from the PDP process. For this reason, there may be fewer employees in these reports than you see in the My Organization list.

## Goals Summary

This tab provides an overview of the current status of goals within your authorized area. Pie charts, bar graphs, and average values are provided for several indicators. The data that informs the charts can be downloaded by clicking the Excel spreadsheet icon in the bottom right of each chart area.

This tab can be useful in identifying the type (work, learning, career development) and topic (sorted by goal tag) of goals in various parts of the organization. This tab can also be useful in identifying and following up with users that have yet to set a goal in their profile.

Historical or trend reporting about the type and number of active goals at various points in time is not available in the PDP and must be accessed separately through the data warehouse.

## Conversations Summary

This tab provides an overview of the upcoming, open, and completed conversations within your authorized area. Pie charts are provided for several indicators. The data that informs the charts can be downloaded by clicking the Excel spreadsheet icon in the bottom right of each chart area.

Historical or trend reporting about the number and type of conversations at various points in time is not available in the PDP and must be accessed separately through the data warehouse.

### Next Conversation Due

This graph provides an overview of upcoming and overdue conversation deadlines for employees in your area. The PDP generates notifications for employees when their next conversation is due in one month, due in one week, and overdue.

Since PDP deadlines are based on individuals and are flexible throughout the year, there will almost always be a percentage of employees that are overdue. This is not necessarily a problem. However, you can download the data from this graph to identify and follow up with employees that ignore the automatic notifications and are significantly past their due dates (i.e. more than one month).

### Open Conversations by Topic

This graph shows the topics of all open conversations (i.e. any conversation that has not yet been signed by both employee and supervisor). It is possible that a single employee could have more than one open conversation at the same time. You can download and sort the data from this graph to see results on an employee basis.

If you aren't interested in the topic of the conversations and just want to know which employees have an open conversation, you can use the data from the "User Has Open Conversation" graph lower on the page.

### Completed Conversations by Topic

This graph shows the topics of all completed conversations (i.e. any conversation that has been signed by both employee and supervisor). It is possible that a single employee could have more than one completed conversation at the same time. You can download and sort the data from this graph to see results on an employee basis.

If you aren't interested in the topic of the conversations and just want to know which employees have completed at least one conversation, you can use the data from the "User Has Completed Conversation" graph lower on the page.

### User Has Open Conversation

This graph shows which employees have at least one open conversation (i.e. any conversation that has not yet been signed by both employee and supervisor). If you are interested in the topics of open conversations, you can use the data from the "Open Conversations by Topic" graph higher on the page.

### User Has Completed Conversation

This graph shows which employees have at least one completed conversation (i.e. any conversation that has been signed by both employee and supervisor). If you are interested in the topics of completed conversations, you can use the data from the "Completed Conversations by Topic" graph higher on the page.

## Shared Employee Summary

This graph shows how many employees in your authorized area are currently being shared with a second supervisor in the PDP. You can download the data from this graph to see who the employees are being shared with.

## Excused Employee Summary

This graph shows how many employees in your authorized area are currently excused from the PDP process. You can download the data from this graph to see additional details.