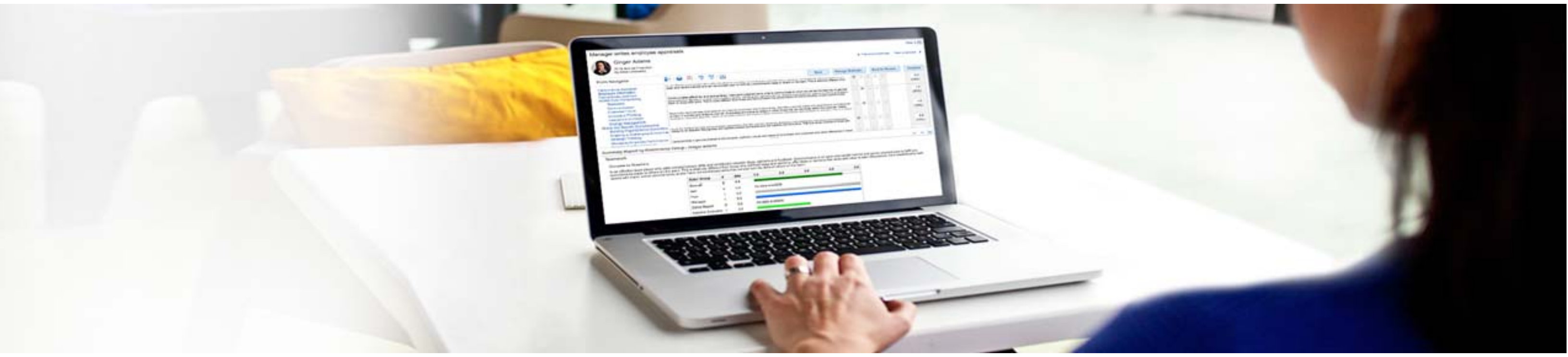
HALOGEN SOFTWARE

Be Brilliant.



Halogen TalentSpace

User Guide

Version 17.1

Table of Contents

Viewing What’s New in the Feed

The Feed provides you with a quick way to view feedback you have received, changes to your goals, updates to your development plans, and so on. For example, if your manager adds a new goal for you, you will see a notification of the change in the Feed.

You can click on many entries in the Feed to view the underlying information.

If you are a manager, the **All** tab shows you the activities of your direct reports, representees, and coached employees.

What You Can Do

Customize What You See in the Feed

- On the Home page, click the Settings icon in the Feed to customize what activities you want to show or hide in your Feed.

  Settings icon

  For example, you can decide to only view updates to goals and development plans while hiding updates to the rest of your activities.

Updating Your Profile

Your employee profile is a collection of data, such as your education, professional development, and so on. The sections you see on your profile are ones that your administrator has set up. Key information from your profile is also displayed in Talent View, if that has been turned on in your organization. In addition, information from your profile can be searched using Talent Search if that is turned on as well.

What You Can Do

Modify Your Profile

You can modify your profile as you gain new skills, attend training, and so on.

Tip: Hover over the Information icon to see the weights assigned to each profile section that you have not yet completed.

Information icon

1 From the Profile menu on the Home page, click **Edit Profile**.

2 Do one of the following:

- Expand the section, and then click **Add**.
- Click the Edit icon to modify a section.

 Edit icon

Note: You cannot update basic employee information (name, job title, and so on) at the top of the profile. If you need basic employee information changed, contact your administrator.

Viewing All Your Tasks

1 To view all your tasks, do one of the following:

- Click the **All Tasks** link on the Home page.
- From the Main menu on the Home page, click **All Tasks**.

2 Do any of the following:

- To filter on Completed, Not Ready, or Sent for Review, select the appropriate switch.
- To sort a column either ascending or descending, select the column header.
- Click the Action menu to perform more tasks, such as going to the Task Status page or the Process Status page.

3 To go back to the Home page, click the Back icon.

Back icon

About the Task Status Page

The Task Status page is available to management or to employees that are responsible for evaluating another employee, reviewing a job description (if Halogen Job Description Builder is licensed), or providing feedback on a candidate's application (if Halogen Talent Acquisition is licensed).

You can complete tasks from the tasks list and you can view mini status reports.

For more information on what you can do from the Task Status page, see any of the following:

- "Viewing Task Status" on page 48
- "Viewing Mini Status Reports" on page 49

Viewing Task Status

1 From the Main menu on the Home page, click **Task Status**.

Tip: You can also click the **Task Status** link on the Task tile.

2 Click **Tasks** or **Overview**.

- The Tasks page shows the detailed tasks for a specific step or job requisition, and it shows the due date for each step. Click a step to display the details of the tasks for the step.
- The Overview provides an overall status view of where each of your reports is in the selected process. From this view, you can also drill down to look at different levels in the management hierarchy.

Tips:

- Use the **Viewing** list to select a different process.
- Hover your mouse pointer over a task to view more information.

Viewing Mini Status Reports

Mini status reports provide you with summary information about the status of specific steps in a process.

1 From the Main menu on the Home page, click **Task Status**.

Tip: You can also click the **Task Status** link on the Task tile.

2 Click **View Status**.

About 1:1 Exchange

1:1 Exchange gives you access to tools that facilitate one-on-one meetings. It is a centralized way to track and collaborate on goals and projects, exchange meaningful feedback, provide coaching, discuss career development opportunities, or any issue that matters. As an employee, it offers a method for one-on-one time with your manager. If you are a manger, it helps manage employee performance on a regular, ongoing basis.

Preparing for a 1:1 Meeting as an Employee

The 1:1 Meeting tab automatically sets an agenda for meetings between employees and managers. When an employee's goals, development plans, learning activities, or feedback are created or updated, an item is added to the agenda for the 1:1 meeting.

On the 1:1 Meeting tab, employees can:

- add agenda items
- add feedback
- add, edit, and delete comments on agenda items
- review the minutes of previous 1:1 meetings
- print an agenda or the minutes from a previous meeting

Note: HR Representatives, higher level HR Representatives, managers, and higher level managers have access to view employee 1:1 agenda pages.

Add an Agenda Item on the 1:1 Meeting Tab

1. Click the **1:1 Prepare to Meet** bookmark.
2. Click the Add Agenda Item icon.
    Add Agenda Item icon
3. Enter a title for the agenda item.
4. Optionally, enter a description.
5. Click **OK**.

   Tip: To delete an agenda item, select it and then click the Delete icon.

    Delete icon

Add Feedback on the 1:1 Meeting Tab

Employees and managers can add feedback from the 1:1 Meeting tab.

1 Click the **1:1 Prepare to Meet** bookmark.

2 Click the Add Feedback icon, and then click the feedback type.

Add Feedback icon

Add Comments on Agenda Items

Employees and managers can add comments on agenda items.

1 Click the **1:1 Prepare to Meet** bookmark.

2 Click a discussion topic, and then type the comment.

Note: You can edit and delete added comments.

Review the Minutes of Previous Meetings

Employees and managers can review the minutes of previous meetings.

1 If you are an employee, click the **1:1 Prepare to Meet** bookmark.

2 Click **Past Meetings**, and then click the link of the minutes you want to review.

Note: If permissions allow, you can edit agenda items by clicking the links.

Print a 1:1 Agenda

Employees and managers can print the meeting agenda.

1 Click the **1:1 Prepare to Meet** bookmark.

2 Click the Print icon.

Print icon

Print the Minutes of Previous Meetings

Employees and managers can print the minutes of previous meetings.

1 Click the **1:1 Prepare to Meet** bookmark.

2 Click **Past Minutes**, and then click the link of the minutes you want to review.

3 Click the **Print** icon.

Print icon

Running a 1:1 Meeting as a Manager

Managers can use all the features as an employee, as well as:

- start and end 1:1 meetings
- change or hide conversation starter questions
- mark an agenda item as a non-recurring topic
- start a 1:1 meeting as a secondary manager

Start and End 1:1 Meetings

Managers can use the 1:1 Meeting tab to create meeting minutes using existing agenda items.

1. From the Home page Main menu click **My Employees**, and then click the **View** link in the **1:1 Meeting** column for any employee.
2. Click **Start Meeting**.
3. Click a discussion topic.

   Note: If you add comments to any discussion topic, your comments will appear in the minutes.
4. Repeat Step 3 for each agenda item.

   Note: To prevent a discussion topic from being added to the agenda for future 1:1 meetings, set the **Recurring** switch to off.
5. When finished the meeting, click **End Meeting**.

Change Conversation Starters

Conversation starters are questions that help you start discussions with your employees in 1:1 meetings.

1. From the Home page Main menu click **My Employees**, and then click the **View** link in the **1:1 Meeting** column for any employee.
2. Click the **Change question** link.

Mark an Agenda Item as a Non-Recurring Topic

By default, all topics you add to the agenda are marked as recurring topics. As a manager, you can mark an agenda item as one that does not recur.

1. From the Home page Main menu click **My Employees**, and then click the **View** link in the **1:1 Meeting** column for any employee.

2 Start the meeting.

3 Select the topic.

4 Set the **Recurring** switch to off.

Running a 1:1 Meeting as a Secondary Manager or Coach

As a secondary manager or coach, you can start a 1:1: meeting with an employee if permissions to access 1:1 meetings have been set up.

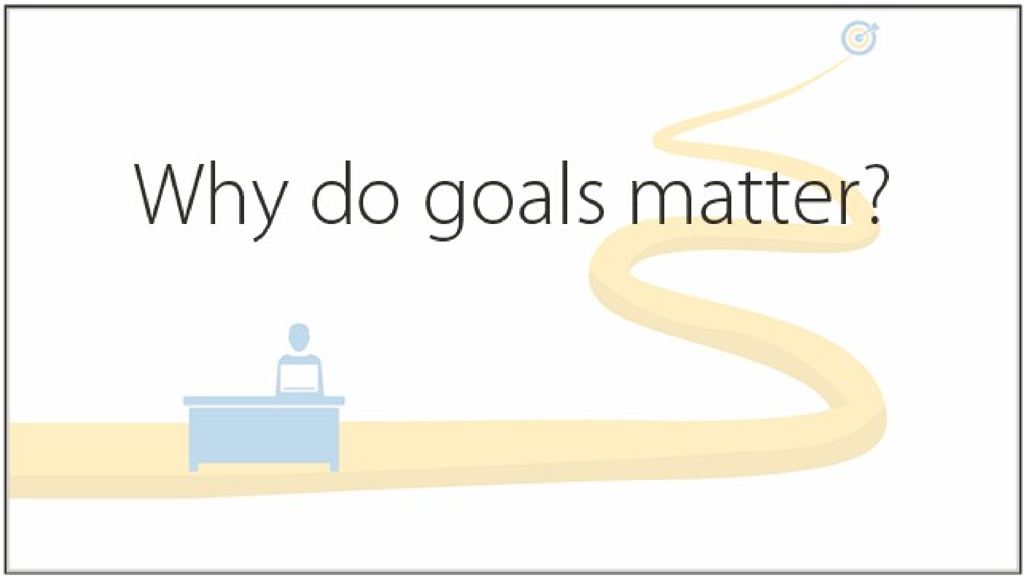
1 From the Home page Main menu click **My Employees** and then click the employee's name.

2 Click **1:1 Meeting**.

If a meeting is already in progress with another manager or coach, you will see a warning. You can choose to end the meeting on behalf of the originator of the meeting or be limited to just adding agenda items or comments to the existing meeting. Any item added and marked as read in the originator's meeting, gets saved in the minutes for that meeting.

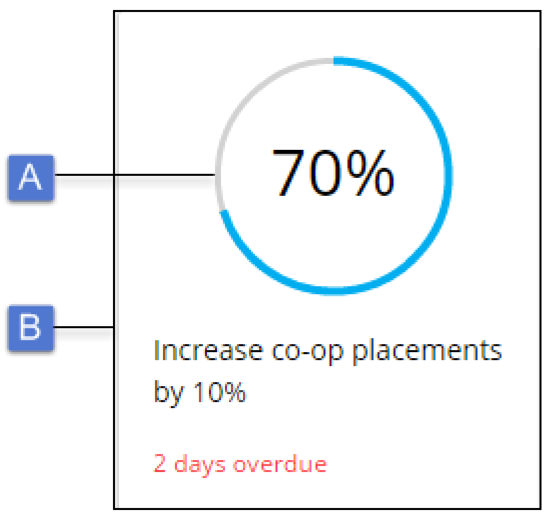
3 See "Preparing for a 1:1 Meeting as an Employee" on page 42 to find out what you can do.

Adding or Updating Goals



A goal is an objective an employee is encouraged to achieve, usually in a specified period. A goal can be either an organizational goal or a personal goal.

- Organizational Goals are goals that are important to your entire organization. Your manager may be required to approve your links to organizational goals. If you are the owner of an organizational goal, you can edit these goals.
- Personal goals can be linked to organizational goals or they can stand on their own. For example, you can create a goal that you think aligns with an organizational goal and link the two goals together, such as a personal goal regarding increased product quality with an organizational goal of improved customer satisfaction.



A Shows the percentage complete for the goal.

B Click the tile to change the completion, add comments, and more.

What You Can Do

Your manager can add goals for you, and you can add goals for yourself. In addition, goals can be added for you from a completed evaluation.

You can edit goals that you have created. However, management decides if you can edit goals that they have created for you.

You can delete your own goals, but you cannot delete goals that your manager has created for you, and you cannot delete organizational goals.

Note: The goals you see on the Home page appear in order of priority based on due date and when the goal was last modified.

Add a Goal

You can add a personal goal or discuss adding an organizational or departmental goal with your manager.

1 On the Home page, click the Add icon on the Goals tile.

Add icon

2 Enter a weight for the goal, if applicable.

For example, if you have four goals, you may set two of them with more weight than the other two.

3 Enter a title for the goal.

4 Enter a description.

5 Set the **Start Date** and **Due Date**.

6 Click **OK**.

Update a Goal

It is recommended that you update your goals on a regular basis.

1 On the Home page, click the goal.

2 Edit the weight, title and description as desired.

3 If needed, edit the due date.

4 From the **Status** list, select one of the status options.

5 From the **Percent Complete** list, select a percentage.

6 From the **Progress Flag** area, select one of the options.

7 Click **OK**.

Add, Edit or Delete Comments for a Goal

Use the comments to provide ongoing status about the goal to your management. Updating the comments on a regular basis is recommended.

1 On the Home page, click the goal.

2 Under Comments, do one of the following:

- To add a comment, enter text in the **Add a comment** field, and then click **Add**.
- To edit a comment, click the Edit icon beside the comment to edit, edit, and then click **Save**.

  Edit Comment icon

- To delete a comment, click the Delete Comment icon beside the comment to delete, and then click **Yes**.

  Delete Comment icon

3 Click **OK**.

Mark a Goal as Completed

1 On the Home page, click the goal.

2 Use the Calendar icon to select the Completed date.

Calendar icon

3 From the **Status** list, select **Completed**.

4 From the **Percent Complete** list, select **100%**.

5 Click **OK**.

Delete a Goal You Created

You can delete your own goals, but you cannot delete goals that your manager has created for you, and you cannot delete organizational goals.

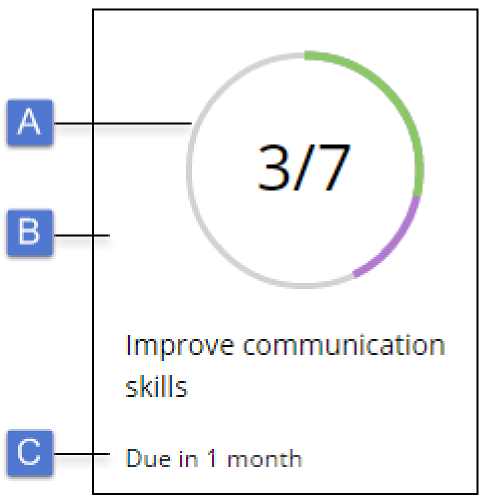
1 On the Home page, click **All Goals**.

2 Select the check box beside the goal you want to delete.

3 Click the **Delete** button, and then click **OK**.

Adding or Updating Development Plans

Development plans detail activities that an employee is encouraged to undertake, and they are usually used to improve a skill or competency.



A Shows the number of learning or development activities that have been completed. Note that learning activities that have a status of "Withdrawn" will also show as completed. Completed learning activities show in green and completed development activities show in purple.

B Click the tile to change the due date, status, completed date, add comments, and more.

C Shows the due date for the development plan.

What You Can Do

You can:

- add development plans or they can be added by your management.

- edit development plans that you have created. However, management decides if you can edit development plans that they have created for you.
- add, edit, and delete comments associated with development plans.
- delete development plans that you have created, but you cannot delete development plans created for you by management. Management can delete development plans that they have created for their employees.

Add a Development Plan

You can add a personal development plan or discuss adding one with your manager.

1 On the Home page, click the Add icon on the Development Plans tile.

Add icon

Tip: You can also access development plans by clicking the Main menu > **My Performance**, then **Development Plans**.

2 Enter a title for the development plan.

3 Enter a description.

4 Set the **Due Date** and **Status**.

5 Click **OK**.

Update a Development Plan

1 On the Home page, click the Development Plan that you want to edit.

Tip: You can also access development plans by clicking the Main menu > **My Performance**, then **Development Plans**.

2 Make any desired changes.

3 Click **OK**.

Add, Edit or Delete Comments for a Development Plan

Use the comments to provide ongoing status about the development plan to your management. Updating the comments on a regular basis is recommended.

1 On the Home page, click the development plan.

Tip: You can also access development plans by clicking the Main menu > **My Performance**, then **Development Plans**.

2 Under Comments, do one of the following:

- To add a comment, enter text in the **Add a comment** field, and then click **Add**.
- To edit a comment, click the Edit icon beside the comment to edit, edit, and then click **Save**.

  Edit Comment icon

- To delete a comment, click the Delete Comment icon beside the comment to delete, and then click **Yes**.

  Delete Comment icon

3 Click **OK**.

Mark a Development Plan as Completed

1 On the Home page, click the development plan.

Tip: You can also access development plans by clicking the Main menu > **My Performance**, then **Development Plans**.

2 From the **Status** list, select **Completed**.

3 Use the Calendar icon to select the Completed date.

Calendar icon

4 Click **OK**.

Delete a Development Plan You Created

You can delete a development plan you created, but you cannot delete development plans that your manager has created for you.

1 On the Home page, click **All Development Plans**.

2 Select the check box beside the development plan you want to delete.

3 Click the **Delete** button, and then click **OK**.

Development Activities

A development activity is a task that is to be performed in order to develop and improve upon a skill or competency. For example, a development activity could be as simple as the following: "Look for a workshop that addresses the following: identify customer needs."

If you are licensed with third-party content, such as DDI, you can add development activities from a catalog to a development plan.

You can:

- View your own development activities at any time, and management can view their employees' development activities as well.
- Mark a development activity as complete.
- Add development activities to an existing development plan.
- Delete a development activity.

Tip: Consider adding development activities to improve performance. For example, suppose you have a development plan for improving communication skills. In this example, you can add a development activity, such as the following: "Ask people if they feel that your writing and speaking are clear and succinct. Ask them for examples of your strengths and areas for improvement. "

What You Can Do

Add a Development Activity to a Development Plan

1. On the Home page, click the development plan that you want to add a development activity to.

   Tip: You can also access development plans by clicking the Home page Main menu > **My Performance**, then **Development Plans**.

2. Click the **Development Activities** tab.

3. Click **Add New**.

4. Enter the text for the development activity.

5. Repeat until you have added all the development activities you want.

6. Click **OK**.

Edit or Delete a Development Activity

1. On the Home page, click the development plan that contains the development activity that you want to edit or delete.

   Tip: You can also access development plans by clicking the Home page Main menu > **My Performance**, then **Development Plans**.

2 Do one of the following:

- To edit a development activity, type the text in the field.
- To delete a development activity, click the Delete icon beside the development activity to delete.

  Delete icon

3 Click **OK**.

Sharing Feedback

By sharing feedback, you can provide input on a colleague's performance. You can also use it to send notes to yourself or share articles or links you found interesting. Feedback can highlight accomplishments, or areas of improvement, and provide ongoing coaching for employees. If you are a manager, you can attach feedback to a form to highlight an employee's accomplishments, support your comments, and so on.

The feedback types you see have been customized by your organization. Depending on how Feedback Central is set up, employees may be able to add the following types of feedback:

- Recognition (for anyone in your organization)
- Journal notes (for yourself only)
- Check This Out (for anyone in your organization)

Depending on how Feedback Central is set up, managers may be able to add the following types of feedback for their reports:

- Manager Notes
- Observations
- Coaching Tips
- Awards (HR Reps only)

You can share some types of feedback, for example, journal notes, with your manager or your employees. Other types of feedback, such as personal notes, are private and cannot be shared.

If you provide recognition feedback for a colleague, he or she will see this feedback in their Feed on the Home page and in their My Performance area the next time they log in to Halogen TalentSpace.

What You Can Do

Send Feedback from Halogen TalentSpace

1 On the **Home** page, click **Do you have feedback to share?**

Note: You can also add feedback from the Home page Main menu > **My Performance** > **Feedback** page using the **Add** button.

2 Select a feedback type.

3 If the feedback is for a colleague, start typing in the **To** field and select the name from the list.

4 Edit or type a subject.

5 Enter the feedback.

6 If you have the option to share the feedback, select the **Share** check box if desired.

7 Click **Send**.

After you send feedback to a colleague, he or she will see this feedback in their **My Performance** area.

Send Feedback from the Feedback Central Plug-in

To send feedback from Microsoft Outlook, the Feedback Central Plug-in must be activated. See “Activating or Deactivating the Feedback Central Plug-in” on page 7.

1 Do one of the following from Microsoft Outlook:

- To send an existing email as feedback, select the email item and click Send Feedback.
- 

Send Feedback icon

  Tip: You may want to edit the email thread so that only the important pieces are included.
- To send a new email as feedback, click **New Email** and click the Halogen Feedback Central icon.

2 Select a feedback type.

3 If the feedback is for a colleague, start typing in the field or use the **Advanced Search**. Select the name from the list.

4 Edit or type a subject.

5 Enter the feedback.

6 If you have the option to share the feedback, select the **Share** check box if desired.

7 Click **Send**.

After you send feedback to a colleague, he or she will see this feedback in their My Performance area.

View Feedback Received and Feedback Sent

When someone sends you feedback, you will see it the following locations:

- in your Feed on the Home page
- on the Home page Main menu > **My Performance** > **Feedback** page
- in your 1:1 agenda list if you have 1:1 Exchange licensed

You can view feedback that you have added for yourself at any time. If management adds feedback for you, they decide if you can view it or not.

1 In Halogen TalentSpace, click the Main menu > **My Performance** > **Feedback**.

2 Do one of the following:

- To see feedback received, click the **Feedback Received** tab.
- To see feedback sent, click the **Feedback Sent** tab.

If there are many recipients, you can click the **More** link to see the full list.

Print or Export Feedback Received

You can print or export all the feedback you have received.

1 In Halogen TalentSpace, click the Main menu > **My Performance** > **Feedback**.

2 Do one of the following:

- To print a summarized list, click the Print icon and select **List**.

  Print icon

- To print a detailed list that includes the feedback, click the Print icon and select **Detailed List**.
- To export all feedback to Microsoft Excel, click the Microsoft Excel icon.

  Export to Microsoft Excel icon

Delete a Feedback Item

You can delete feedback that you have created for yourself, or for an employee, but you cannot delete feedback that was created for you.

1 In Halogen TalentSpace, on the Home page click the Main menu > **My Performance** > **Feedback**.

2 Select the check box beside the feedback item you want to delete.

3 Click **Delete**.

Requesting Feedback

Requesting feedback is not an easy or natural task. However, it's essential to improve and develop in your career. Instead of asking "how am I doing", try to ask for more specific questions, such as "what are some things that I did well?" and "what are some things I could have done differently or better?". You can follow-up and ask for examples and details. Don't just ask your manager, but try asking your coworkers as well.

1 On the **Home** page, click **Do you have feedback to share?**

2 Click **Request Feedback**.

3 Start typing the name of the person you want to hear feedback from in the field and select the name from the list.

4 Edit or type a subject.

5 Enter your request.

6 Click **Send**.

After you send a request to a colleague, he or she will see a message saying they have pending requests on the Home page.

Responding to a Request for Feedback

A colleague may ask you to provide feedback.

1 On the **Home** page, click **Pending Requests** link.

2 Click the item from the list of pending requests.

3 Do one of the following:

- To reply to the request now, click **Reply**. Select the type of feedback to send, enter the feedback, and click **Send**.
- To reply to the request later, click **Reply later**.
- To decline and not send a request, click **Ignore**.

  The person who requested the feedback will not be notified that you ignored the request; however, they may wonder why they didn't receive a response and can send another request.