Using Evaluation WorkCenter

Understanding Evaluation WorkCenter

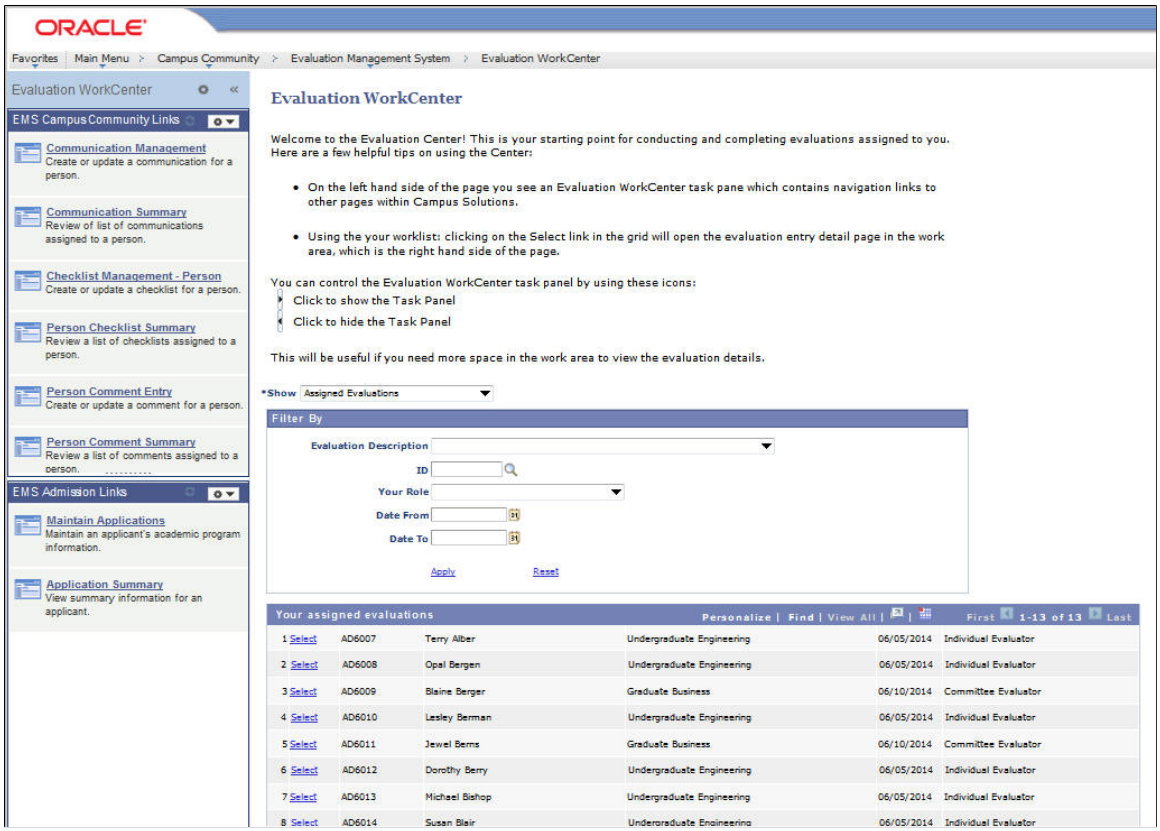
The Evaluation WorkCenter is a configurable page that an evaluator or evaluation administrator can use to:

- View open evaluations that the evaluator or administrator needs to complete.
- Enter and submit evaluations.
- Access pagelets that contain navigation links to components, which the evaluator or administrator frequently uses as part of their business needs.

Bundle 34: This image is updated

Image: Delivered Evaluation WorkCenter

This is the Evaluation WorkCenter that PeopleSoft delivers:



To access the delivered Evaluation WorkCenter, select Campus Community, Evaluation Management System, Evaluation WorkCenter.

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The delivered Evaluation WorkCenter contains a landing page with the worklist in the work area of the workcenter and a set of sample pagelets in the task pane. The work area is on the right side of the workcenter and the task pane is on left side of the workcenter.

- Landing page: is a PIA delivered object with the worklist embedded on the page. While you can modify the text that appears on the page via the Message Catalog, this page should not otherwise be modified.

- Worklist (SCC_SS_GE_WORKLIST): This is a component that is embedded in the landing page and provides a list of open evaluations that the signed in evaluator or administrator needs to complete. The evaluator or administrator clicks an assigned evaluation to access the Evaluation Decision Entry page. The evaluator or administrator uses this page to enter and submit the evaluation. Note that this component provides a list of only those evaluations for which the evaluator or administrator has access.

  Evaluations appear in the worklist based upon workflow processing. Therefore, an evaluation only appears when it is ready for the evaluator's review. The worklist may be sorted by clicking on the column headers. When the evaluator or administrator has completed the evaluation (that is, submitted), the item will no longer appear in the list.

  Because the worklist is a component object, it is also delivered under the menu navigation – *Campus Community, Evaluation Management System, Evaluation WorkList* – as an alternative access point, if the Evaluation WorkCenter is not used at your institution.

- Bundle 34: This list item is added

  An evaluator may use the Show option and Filter By capabilities to sort and organize the items in their worklist.

  Show: The available values are *Assigned Evaluations, Completed Evaluations, Upcoming Evaluations*. The default is *Assigned Evaluations*, so the evaluator immediately sees all evaluations that are ready for their review. When changing the value here, code fires and updates worklist items with those that are in the appropriate status. In all cases, the items in the worklist present only if the user has been an active or past evaluator in the evaluation. In other words they will not be able to access evaluations in which they did not participate.

  Filter By section: The available values are:

  Evaluation Description: values displayed in the dropdown result from a security view, limiting the results to those Evaluations to which the user has access.

  ID: to select a specific evaluee for whom the user might want to view the evaluation. Prompts against PEOPLE_SEARCH.

  Your Role: Because a person may wear multiple ‘evaluator’ hats, this option allows the user to narrow the results to a particular role they may have played in an evaluation. As an example, perhaps in one evaluation they were a committee member but also the Committee Administrator in an evaluation. This option allows the user to select the Committee Administrator role.

  Date From: Allows for narrowing results to a specific date range. When the Show option of ‘Completed Evaluations’ is selected, this date is defaulted as a date seven days prior to the current date. This is to limit the results return and avoid a potential performance issue, recognizing that over time an evaluator may have amassed a huge volume of completed evaluations. The user may overwrite these values.

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Date To: Allows for narrowing results to a specific date range. When the Show option of 'Completed Evaluations' is selected, this date is defaulted as a the current date.

Apply: After populating the filter by parameters, the user must select the Apply link in order to see the items returned in the worklist.

Reset: The user may clear the Filter By options by selecting the Reset link.

- Pagelets: These are navigation sample pagelets in the task pane to illustrate how the center may be configured. There are many other pagelet types that can be incorporated into the Evaluation WorkCenter such as pagelets based upon a query to display metric or dashboard style data to the end user and URL pagelets which can present to the end user related materials and information.

You should have an understanding in PeopleTools Portal and WorkCenter technology to configure the Evaluation WorkCenter.

See the product documentation for *PeopleTools: Portal Technology*

Modifying the Landing Page Text

You can use PeopleTools Message Catalog to modify the text on the landing page of the workcenter. The message set number, message number for the text on the landing page are: 14750, 10025.

Prerequisites for using Evaluation WorkCenter

Before administrators or evaluators can use Evaluation WorkCenter self-service feature, the administrator or evaluator must have a user ID in the system. The administrator or evaluator should have a role that includes security access to Evaluation WorkCenter and the pages which can be accessed from the Evaluation WorkCenter.

Using Self-Service Worklist

If your institution is not using Evaluation WorkCenter, evaluators and administrators can access the Evaluation WorkList component (SCC_SS_GE_WORKLIST) by selecting Campus Community, Evaluation Management System, Evaluation WorkList. This is the same worklist component that the delivered Evaluator WorkCenter displays.

For more information about the worklist component:

See Understanding Evaluation WorkCenter

Entering Evaluations

Evaluators and evaluation administrators click an open evaluation in the worklist pagelet to enter and submit evaluations. When they click the evaluation, the Evaluation Decision Entry page appears. The

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Evaluation Decision Entry page varies according to what type of evaluator or administrator is accessing the page. The following is a list of evaluator types that Evaluation Management System (EMS) supports:

- Evaluation Administrator (Evaluation Code Administrator)
- Individual Evaluator Scheme Administrator
- Individual Evaluator
- Committee Scheme Administrator
- Committee Administrator
- Committee Evaluator

The evaluation code determines who the evaluator is based on whether he or she is assigned to the evaluation and then presents the appropriate page to the evaluator for evaluation decision entry. When you use the Manage Evaluation component or batch process to create an evaluation, you assign an evaluation code to the person who is being evaluated (for example, student, applicant, or research candidate). At that time, these evaluators are assigned to the evaluation.

Depending on the order defined in the EMS setup, the EMS workflow adds the open evaluation to a worklist and (if email notification is enabled in the evaluation code setup) sends an email to the evaluator or administrator notifying that the open evaluation has been added to her or his worklist.

See Setting Up Evaluation Codes

See Managing Evaluations

See Processing Evaluations in Batch

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See Sending Timeout and Reminder Notifications to Evaluators

Image: Example of an evaluation code setup

This graphic illustrates an example of evaluation code setup:

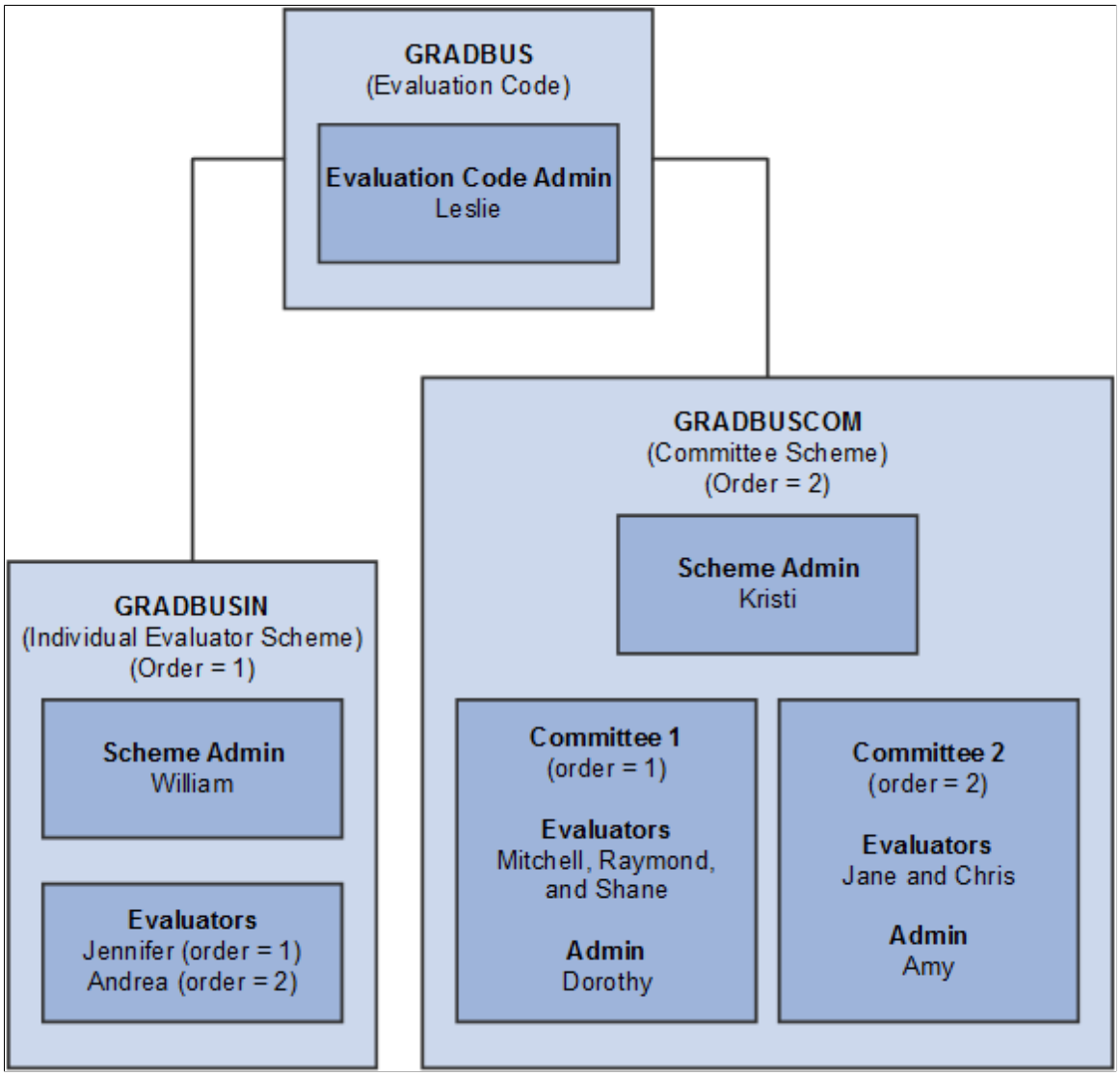

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Image: Example of a workflow processing order

This graphic illustrates the order in which workflow processes the evaluators and administrators based on above example setup:

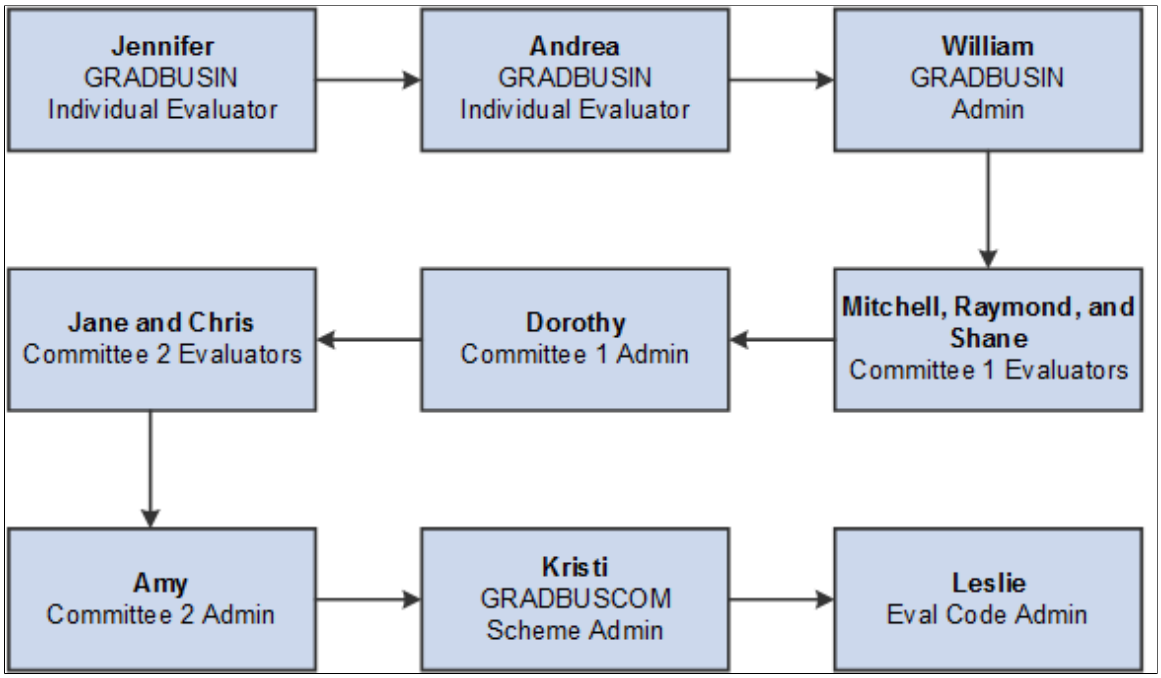

Image: Example of Evaluation Decision Entry page for an Individual Evaluator

This is an example of Evaluation Decision Entry page for an Individual Evaluator:

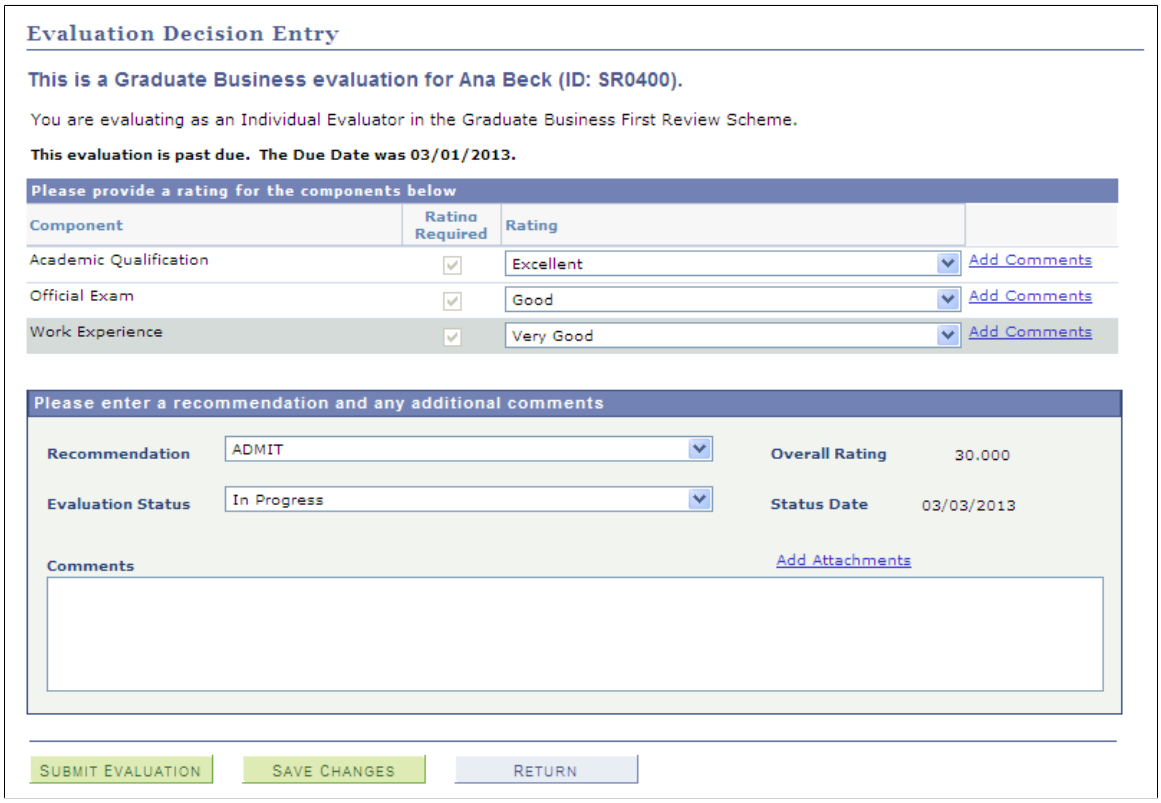

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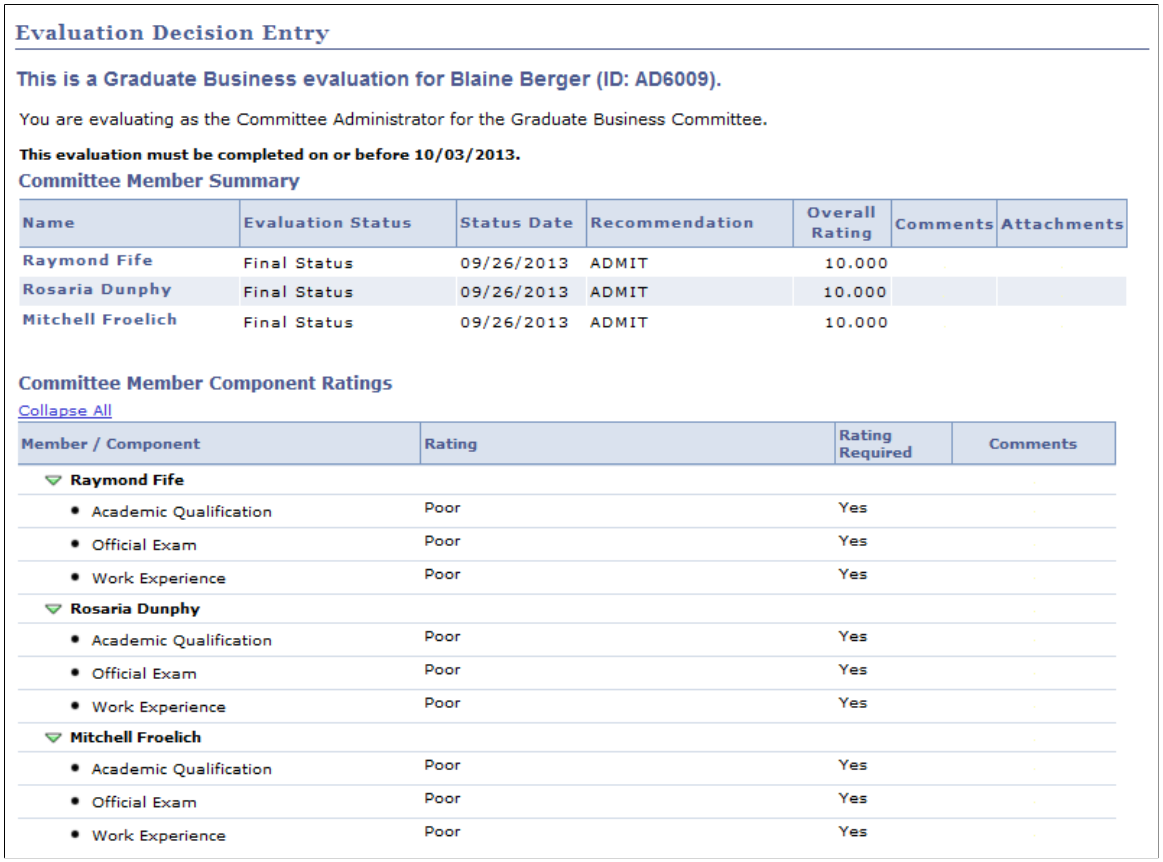
Image: Example of Evaluation Decision Entry page for a Committee Administrator (1 of 2)

This is an example of Evaluation Decision Entry page for a Committee Administrator (1 of 2):



Evaluation Decision Entry

This is a Graduate Business evaluation for Blaine Berger (ID: AD6009).

You are evaluating as the Committee Administrator for the Graduate Business Committee.

This evaluation must be completed on or before 10/03/2013.

Committee Member Summary

Name	Evaluation Status	Status Date	Recommendation	Overall Rating	Comments	Attachments
Raymond Fife	Final Status	09/26/2013	ADMIT	10.000		
Rosaria Dunphy	Final Status	09/26/2013	ADMIT	10.000		
Mitchell Froelich	Final Status	09/26/2013	ADMIT	10.000		

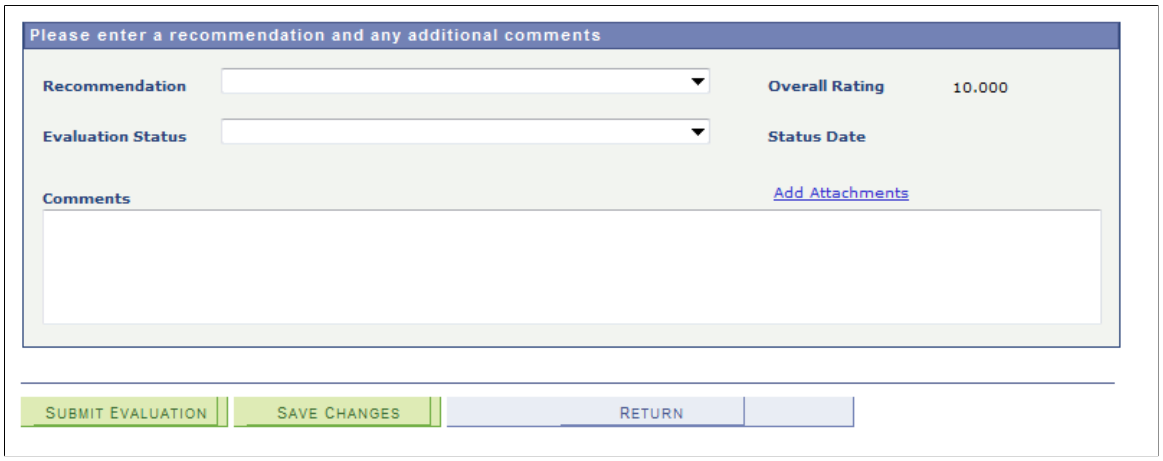
Committee Member Component Ratings

Collapse All

Member / Component	Rating	Rating Required	Comments
Raymond Fife			
• Academic Qualification	Poor	Yes	
• Official Exam	Poor	Yes	
• Work Experience	Poor	Yes	
Rosaria Dunphy			
• Academic Qualification	Poor	Yes	
• Official Exam	Poor	Yes	
• Work Experience	Poor	Yes	
Mitchell Froelich			
• Academic Qualification	Poor	Yes	
• Official Exam	Poor	Yes	
• Work Experience	Poor	Yes	

Image: Example of Evaluation Decision Entry page for a Committee Administrator (2 of 2)

This is an example of Evaluation Decision Entry page for a Committee Administrator (2 of 2):



Please enter a recommendation and any additional comments

Recommendation

Overall Rating 10.000

Evaluation Status

Status Date

Comments

Add Attachments

SUBMIT EVALUATION | SAVE CHANGES | RETURN

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Note: Evaluators and administrators can also use the Manage Evaluation component to enter evaluations. But the difference between the worklist and this component is that in the component an administrator or evaluator can see and update evaluations of other administrators or evaluators (including himself or herself), while the worklist displays only the evaluations assigned to the signed in administrator or evaluator. Another key difference is that an administrator cannot create an evaluation using the worklist. To create a new evaluation, an administrator should use the Manage Evaluation component or the batch process.

Note: The Evaluation Decision Entry page functionality is similar to the Manage Evaluation component. The *Managing Evaluations* topic describes the Manage Evaluation component. Therefore, refer to the Managing Evaluations topic for more information about the fields on the Evaluation Decision Entry page. There are however few differences between the Evaluation Decision Entry page and Manage Evaluation component. One difference is that on the Evaluation Decision Entry page, the evaluator is only seeing that portion he or she needs to work on. Another difference is the Submit Evaluation, Save Changes, and Return buttons that only appear on the Evaluation Decision Entry page. Clicking the Submit Evaluation button finalizes the evaluation and removes the evaluation from the worklist. The evaluator cannot access that evaluation again. Clicking the Save Changes button will save the work-in-progress and the evaluation will remain in the worklist, allowing the evaluator to re-access and complete the evaluation. Finally, clicking the Return button will return the evaluator to the worklist.

See Managing Evaluations

Modifying the Decision Entry Page Text

You can use PeopleTools Message Catalog to modify the text on the decision entry page. The message set number, message number for the text on the decision entry pages that specifies the evaluator role and the evaluation (for instance, "You are evaluating as an Individual Evaluator in the First Review scheme") are:

- Individual Evaluator: 14750, 10006
- Individual Evaluator Scheme Administrator and Committee Scheme Administrator: 14750, 10007
- Committee Evaluator: 14750, 10009
- Committee Administrator: 14750, 10008
- Evaluation Administrator: 14750, 10004

For the text that identifies who is being evaluated and in what context (for instance, “This is an Undergraduate Arts evaluation for Dorothy Berry (ID AD5042)”: 14750, 10010

Additional Information section, Evaluation Overview page, and Committee Collaboration page

Evaluators can use the Additional Information section on the various evaluator decision entry pages. These pages render this section based on the setup configuration in the Define Evaluation Code, Define Individual Evaluator Scheme and Define Committee Scheme components.

For an evaluator, the Evaluation Overview page provides visibility to the evaluation activity beyond what is available on the decision entry page. Setup in the Define Individual Evaluator Scheme and Define Committee Scheme components determines the display of the View Evaluation Overview link on the decision entry pages.

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For committee members, the Committee Collaboration page provides visibility to the evaluation activity within a committee. Access is granted in the Define Committee Scheme component.

Image: Evaluation Decision Entry page for a committee evaluator

This is an example of the decision entry page that shows the Additional Information section, and the View Evaluation Overview and View Committee Collaboration links.

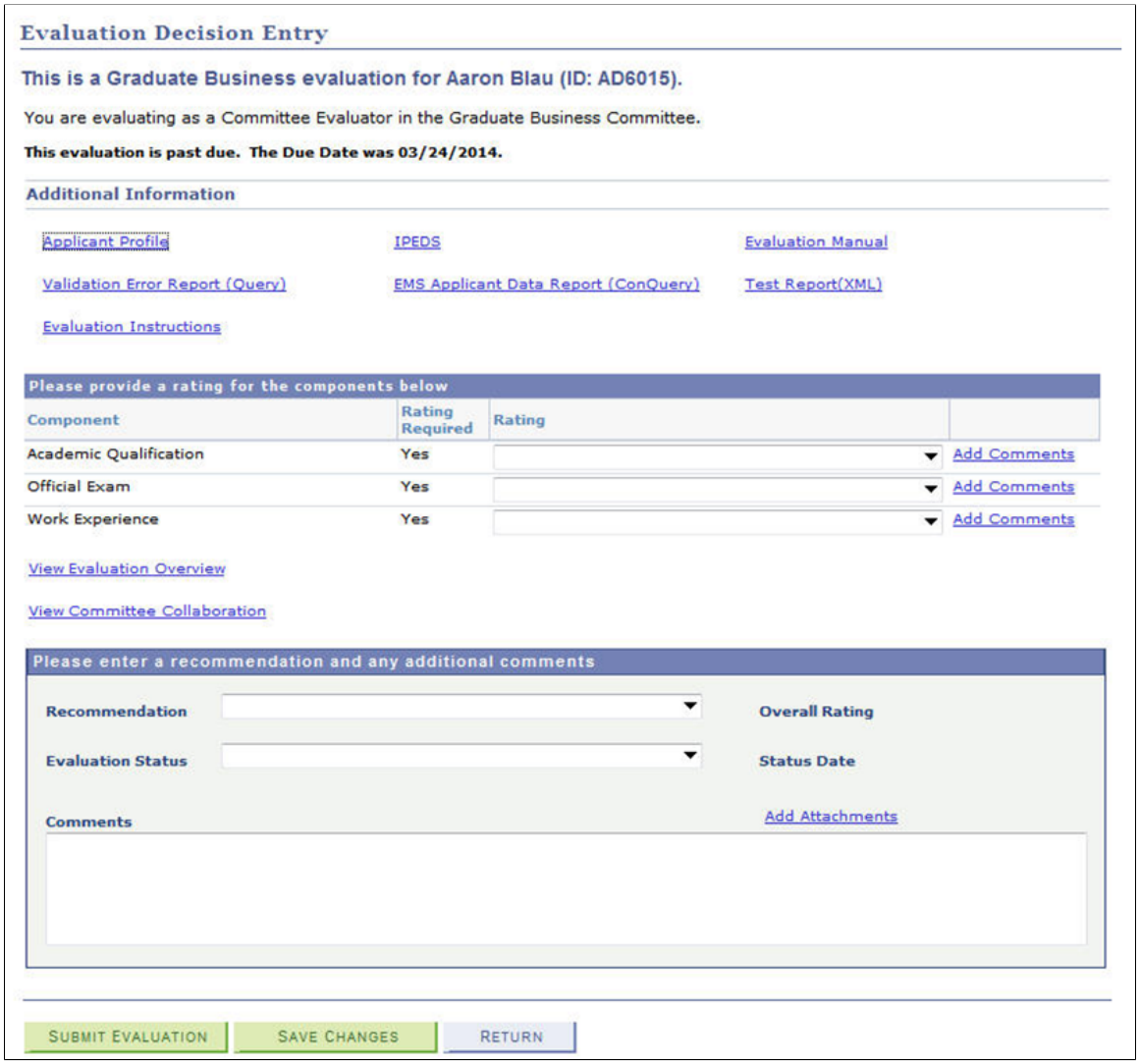

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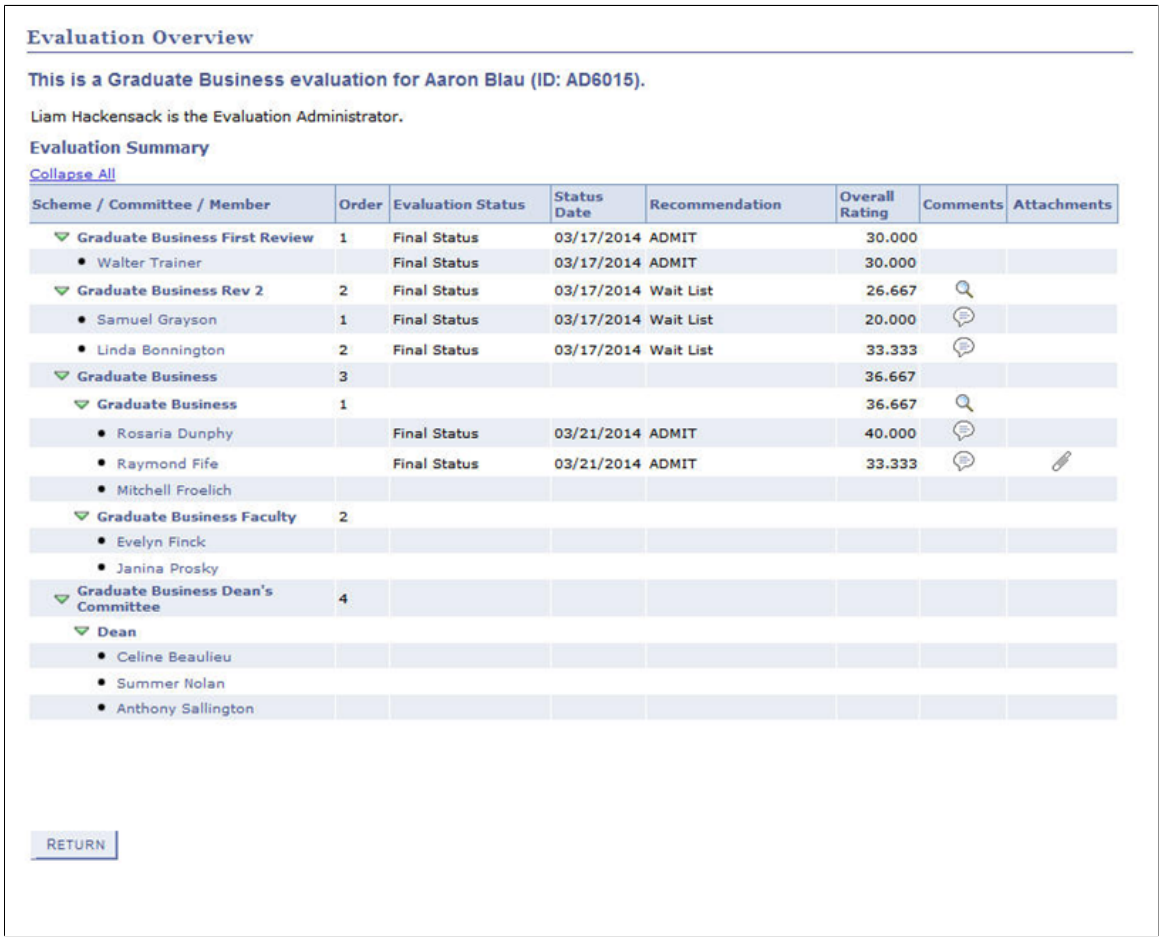
Image: Evaluation Overview page

This is an example of the Evaluation Overview page.



Evaluation Overview

This is a Graduate Business evaluation for Aaron Blau (ID: AD6015).

Liam Hackensack is the Evaluation Administrator.

Evaluation Summary

Collapse All

Scheme / Committee / Member	Order	Evaluation Status	Status Date	Recommendation	Overall Rating	Comments	Attachments
Graduate Business First Review	1	Final Status	03/17/2014	ADMIT	30.000		
• Walter Trainer		Final Status	03/17/2014	ADMIT	30.000		
Graduate Business Rev 2	2	Final Status	03/17/2014	Wait List	26.667		
• Samuel Grayson	1	Final Status	03/17/2014	Wait List	20.000		
• Linda Bonnington	2	Final Status	03/17/2014	Wait List	33.333		
Graduate Business	3				36.667		
Graduate Business	1				36.667		
• Rosaria Dunphy		Final Status	03/21/2014	ADMIT	40.000		
• Raymond Fife		Final Status	03/21/2014	ADMIT	33.333		
• Mitchell Froelich							
Graduate Business Faculty	2						
• Evelyn Finck							
• Janina Prosky							
Graduate Business Dean's Committee	4						
Dean							
• Celine Beaulieu							
• Summer Nolan							
• Anthony Sallington							

RETURN

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In the above example, the view is given to all levels of the evaluation: orders which have completed before this evaluator's turn for the evaluation as well as visibility of which order will occur beyond the evaluator's order in the evaluation.

Image: Committee Collaboration page

This is an example of the Committee Collaboration page.

The ratings, recommendations, comments and attachments are made available to all committee members. The Refresh link refreshes the data to capture any recent changes made by other committee members.

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Pages Used to Enter Evaluations

Page Name	*Definition Name*	*Navigation*	*Usage*
Evaluation Decision Entry (for Evaluation Administrator)	SCC_SS_GE_EVALUATN	An evaluation administrator clicks an open evaluation in his or her worklist.	An Evaluation Administrator uses this page to review a summary of the evaluations entered by members of individual evaluator and committee schemes. After reviewing the summary, the administrator uses this page to enter and submit his or her final evaluation.
Evaluation Decision Entry (for Individual Evaluator Scheme Administrator)	SCC_SS_GE_IE_SCHEM	An Individual Evaluator Scheme Administrator clicks an open evaluation in his or her worklist.	An Individual Evaluator Scheme Administrator uses this page to review a summary of the evaluations entered by members of individual evaluator scheme. After reviewing the summary, the administrator uses this page to enter and submit his or her evaluation.
Evaluation Decision Entry (for Individual Evaluator)	SCC_SS_GE_IE_EVLTR	An Individual Evaluator clicks an open evaluation in his or her worklist.	An Individual Evaluator uses this page to enter and submit his or her evaluation.
Evaluation Decision Entry (for Committee Scheme Administrator)	SCC_SS_GE_CM_SCHEM	A Committee Scheme Administrator clicks an open evaluation in his or her worklist.	A Committee Scheme Administrator uses this page to review a summary of the evaluations entered by members of committees in the committee scheme. After reviewing the summary, the administrator uses this page to enter and submit his or her evaluation.
Evaluation Decision Entry (for Committee Administrator)	SCC_SS_GE_CM_INFO	A Committee Administrator clicks an open evaluation in his or her worklist.	A Committee Scheme Administrator uses this page to review a summary of the evaluations entered by members of the committee. After reviewing the summary, the administrator uses this page to enter and submit his or her evaluation.
Evaluation Decision Entry (for Committee Evaluator)	SCC_SS_GE_CM_EVLTR	A Committee Evaluator clicks an open evaluation in his or her worklist.	A Committee Evaluator uses this page to enter and submit his or her evaluation.

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