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**PERFORMANCE MANAGEMENT REPOSITORY (PMR)
RELEASE 1.0
USER GUIDE FOR “SERVICE UNIT ADMINISTRATIVE
OFFICERS” ROLE**

Human Resource Services (HRS)

March 21, 2017

Document History

Document Version Control

Version	Version Date	Summary of Changes	Author
1.0	03/20/2017	Initial draft document	HRS
2.0	03/21/2017	Final	HRS

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Introduction

Purpose

The Performance Management Repository (PMR) has been developed to provide a centralized electronic storage to house performance management documentation such as performance appraisals, performance requirements or plans, training development documentation (including individual development plans) as well as mid-year reviews. The repository is based on the Confluence enterprise tool that is offered and managed by the Office of the Chief Information Officer (OCIO).

Currently, the service units (SUs) send the scanned signed performance documents to Human Resources Services (HRS) via the Workforce Performance Management (WPM) email box and deliver the original signed appraisal hard copies to the Employee Services Section (ESS).

This new process will replace both methods of delivery and combine it into one method. Each SU will have secure access to their own pages to upload the completed performance documents by the deadline determined by HRS. EmpowHR process compliance will remain the same.

PMR will improve the efficiency of the delivery of the performance management documents through the following key features:

- ***Transparency and Visibility:*** SUs and HRS will be able to have visibility into the delivery of the performance management documents and easily locate the final documents.
- ***Email Notifications:*** Confluence can provide automated notifications if there are any changes made to the SU page when the user selects to “Watch” the page.
- ***Centralized Repository for Performance Documents:*** Confluence provides secure access to a certain space or page for SUs and simplifies delivery of the documents to HRS. This will provide only one easy method for delivery to replace sending emails to WPM mailbox and the manual transmission of paper of the appraisal documents.
- ***Tracking Features:*** Confluence has robust tracking features that stores who uploads a document and the timestamp for uploading the document.

Scope

This guide offers a step-by-step description for the SU administrative officers within the PMR. The screenshots are for guidance only.

Accessing PMR

The general Confluence access URL is: <https://staff.loc.gov/resources>

Each SU will receive its own secure URL in an email. However, the SU administrative officers will use the above URL when logging into Confluence for the first time.

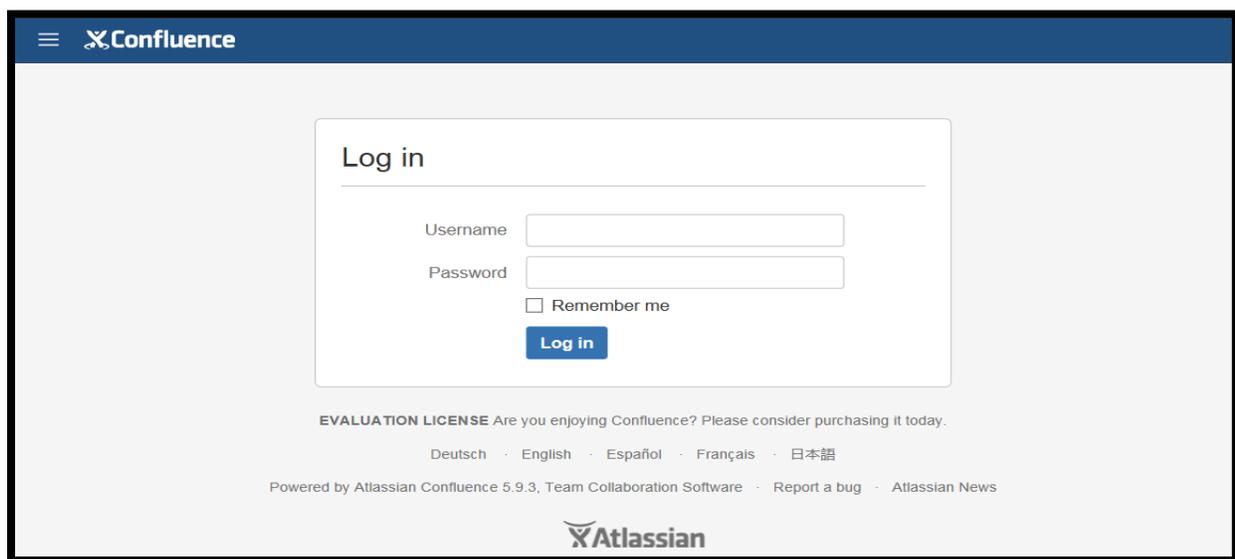
First Time Accessing Confluence

When using the URL: <https://staff.loc.gov/resources>, the following page will display. Click “Log in” link to begin to log into Confluence.



➤ Application Login

On the Confluence login page, users can log in by **typing their Library domain username and password in the appropriate fields**. This feature will allow users to log in and then view spaces and pages in Confluence according to their assigned security access.



Note: The users may see a Confluence tour video on the home page, please skip and continue to the home page.

After the users login for the first time, the HRS administrator needs to be notified so they are able to add the users to the specific secure space for the SU.

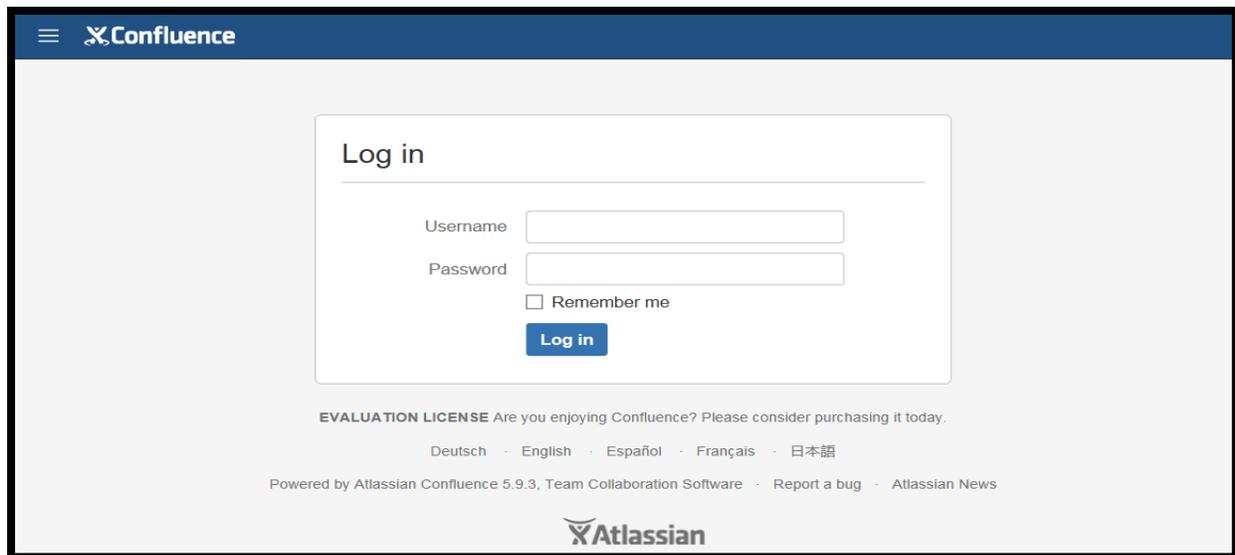
Note: *If the users already Confluence users, then skip the step above.*

Second Time Accessing Confluence

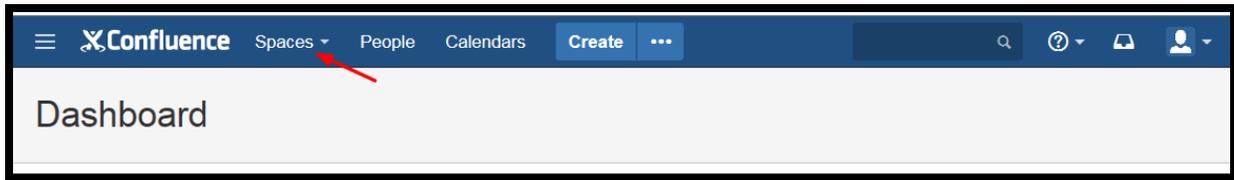
The HRS administrator will provide the secure URL for the specific space for the SU. Users will cut and paste the URL in a web browser.

Note: *It is preferable to use Firefox browser.*

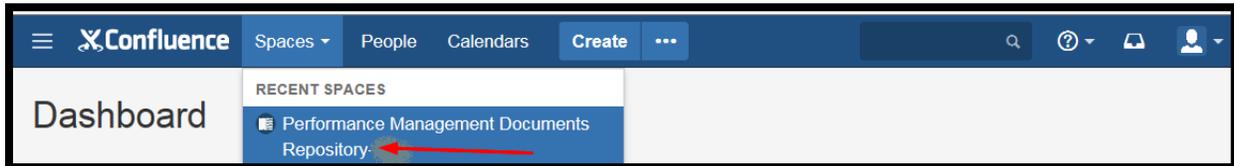
The following page will display. Click “Log in” link to begin to log into Confluence. Users can log in by **typing their Library domain username and password in the appropriate fields.**



After logging in, the screen below will be displayed. Select “Spaces” from the main menu as below.



Select the space pertaining to your SU from the drop down menu of spaces. The space will start with “Performance Management Repository”, followed by the SU name.



➤ Home Page

When selecting the SU space, the space home page will display. The home page is a landing page that may contain information about the space activities as displayed below.

Click on the page tree on the left navigation to navigate to the specific office hierarchy that is organized as follows:

Each “office name” has the following folders to upload corresponding performance documentation as follows:

- **Appraisals/Closeout Reviews:** for uploading the signed and scanned PDFs for performance appraisals for a certain common appraisal period (CAP) or anniversary dates.

- The file naming convention should be as follows:

LastnameFirstnameStartMonthYearEndMonthYearPA

For example, **SmithsonianClevelandMar16Feb17PA**

- **Performance Requirements/Plans and IDPs, EDPs, and T&D Memos:** for uploading the signed and scanned PDFs for performance plans and individual development plans (IDPs), executive development plans (EDPs) or training and development (T&D) memorandums for a certain CAP or anniversary dates.

- The file naming convention for performance requirements/plans:

LastnameFirstnameStartMonthYearEndMonthYearPR

For example, **SmithsonianClevelandMar17Feb18PR**

- The file naming convention for IDPs, EDPs, and T&D Memos:

LastnameFirstnameStartMonthYearEndMonthYearDD

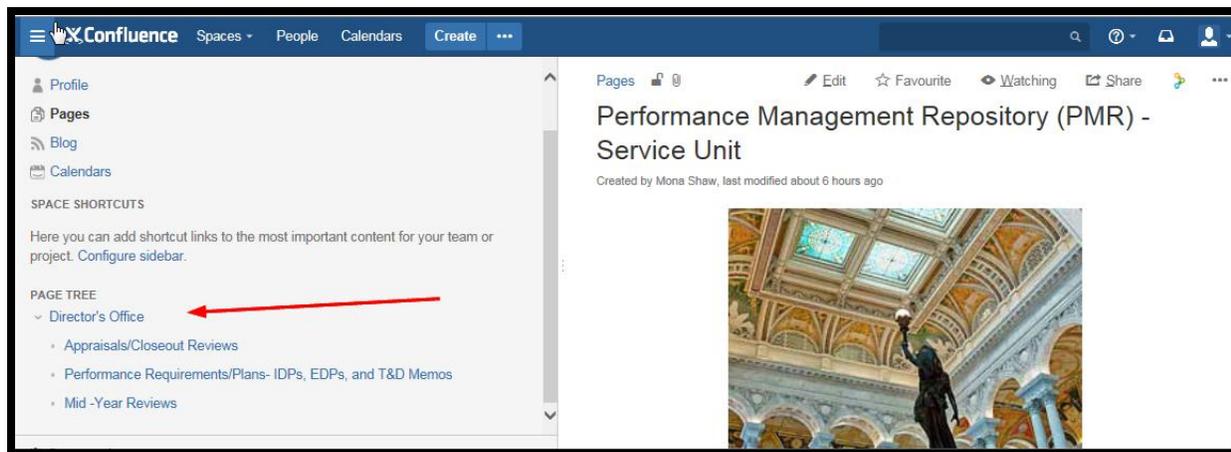
For example, **SmithsonianClevelandMar17Feb18DD**

- **Mid-Year Reviews:** for uploading the signed and scanned PDFs for mid-year reviews for a certain CAP or anniversary dates.

- The file naming convention for mid-year review dates are:

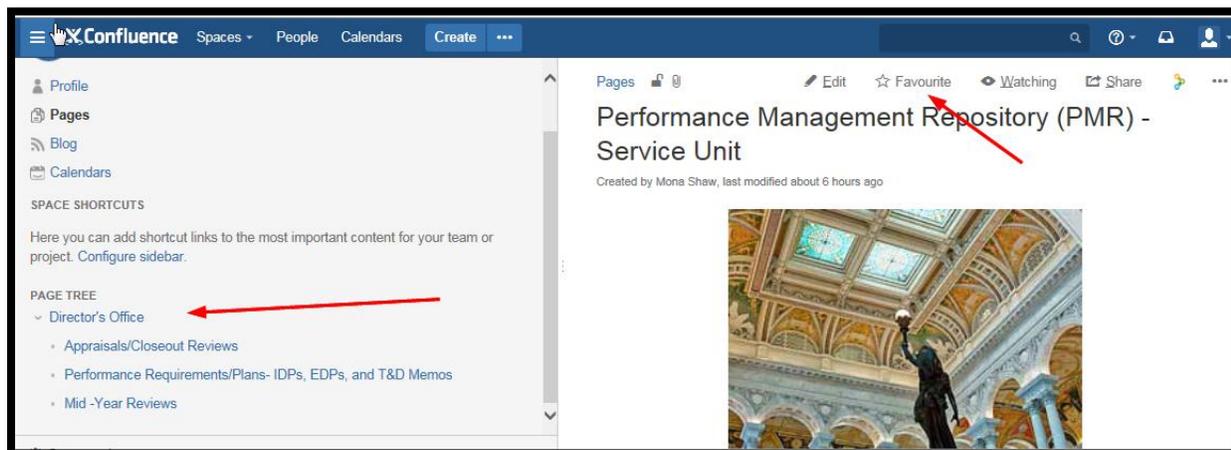
LastnameFirstnameStartMonthYearEndMonthYearMYR

For example, **SmithsonianClevelandMar167Aug16MYR**



➤ Uploading PDF Documents in PMR

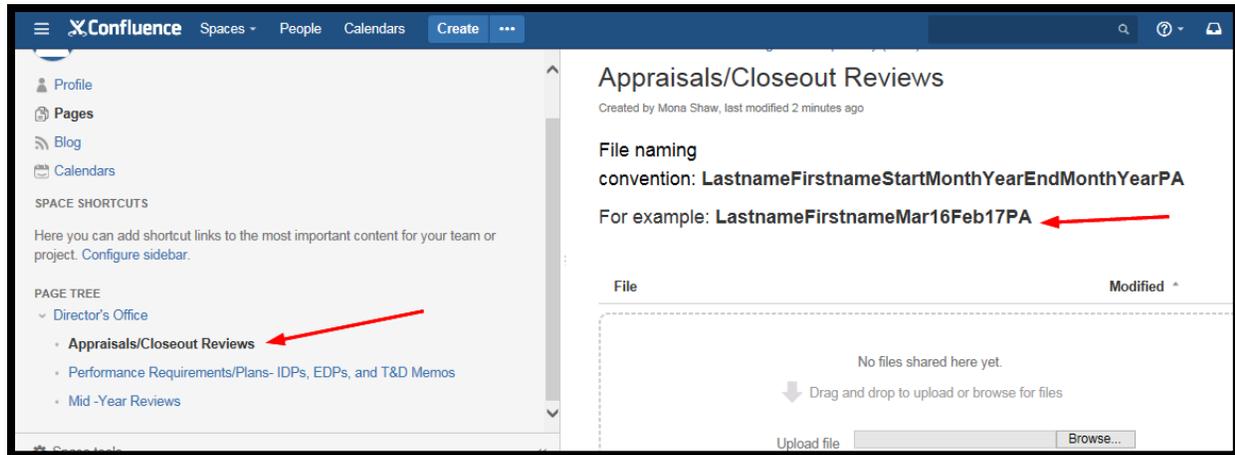
The default home page of the SU space will display if the user logged into Confluence previously and checked “Favorite” on the home page.



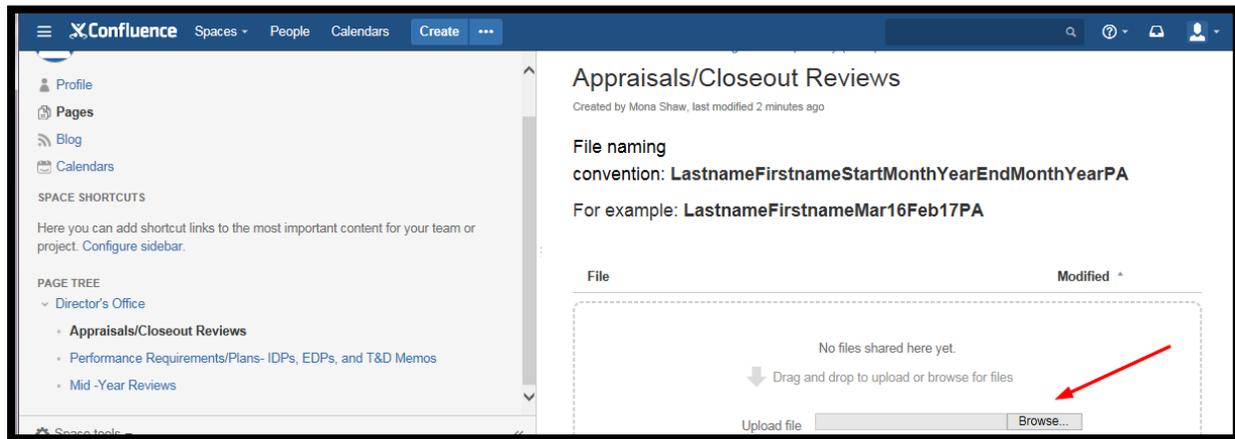
Note: *The SU administrative officers will check to verify if the scanned signed PDF files content is correct and the file naming convention is accurately reflecting the correct employee name and document type. It is preferable to scan the signed PDF document as an Optical Character Recognition (OCR) document.*

The SU administrative officer has the ability to do the following from the left navigation pane of the screen:

- From the home page, click on the “Appraisals/Closeout Reviews” folder on the left navigation pane under the appropriate office page tree to open the sub-page to upload scanned PDF appraisals and/or closeout reviews.

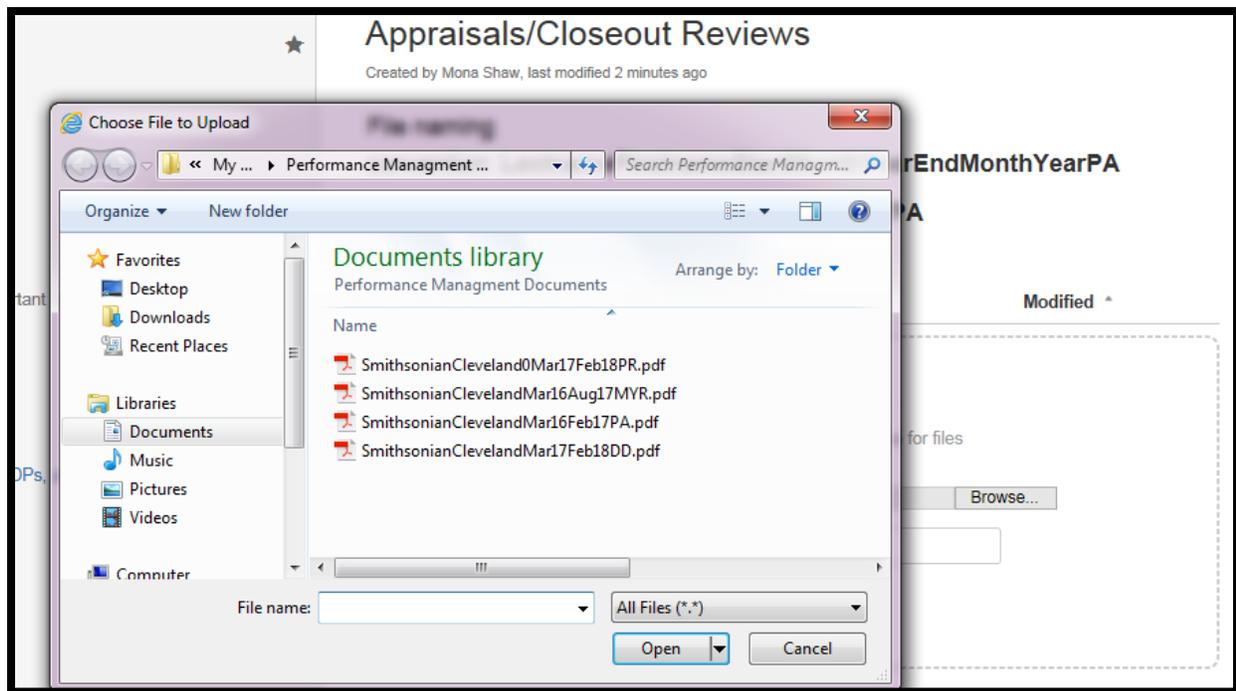


- From the main page of the “Appraisals/Closeout Reviews”, click on the “Browse” button to upload the PDF file.

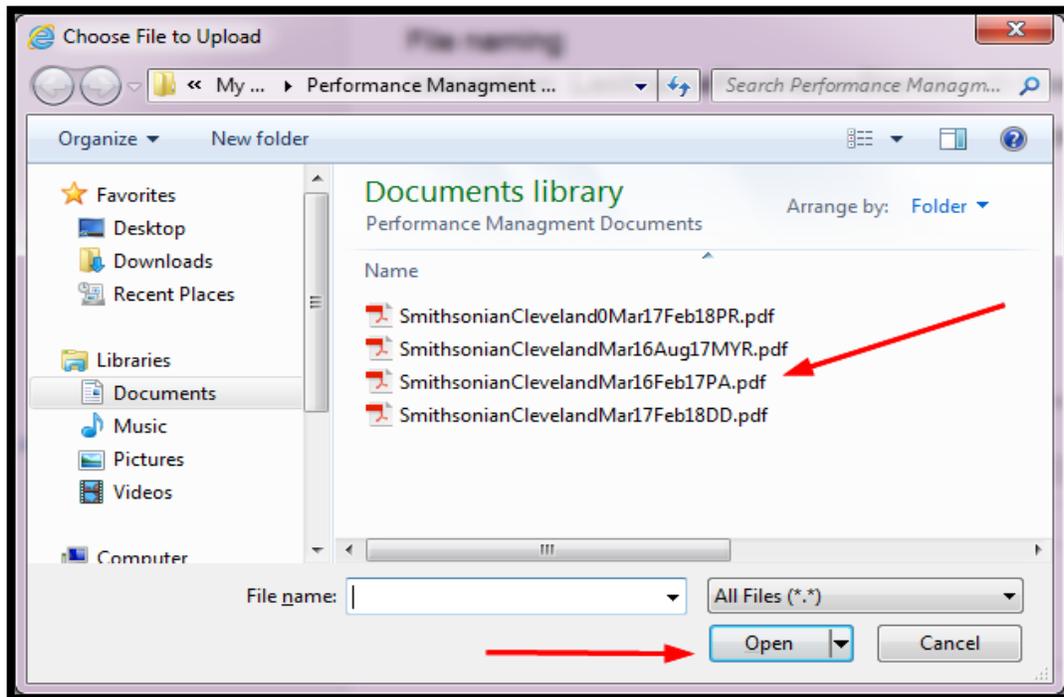


- A window dialog will display to select the PDF file to upload.

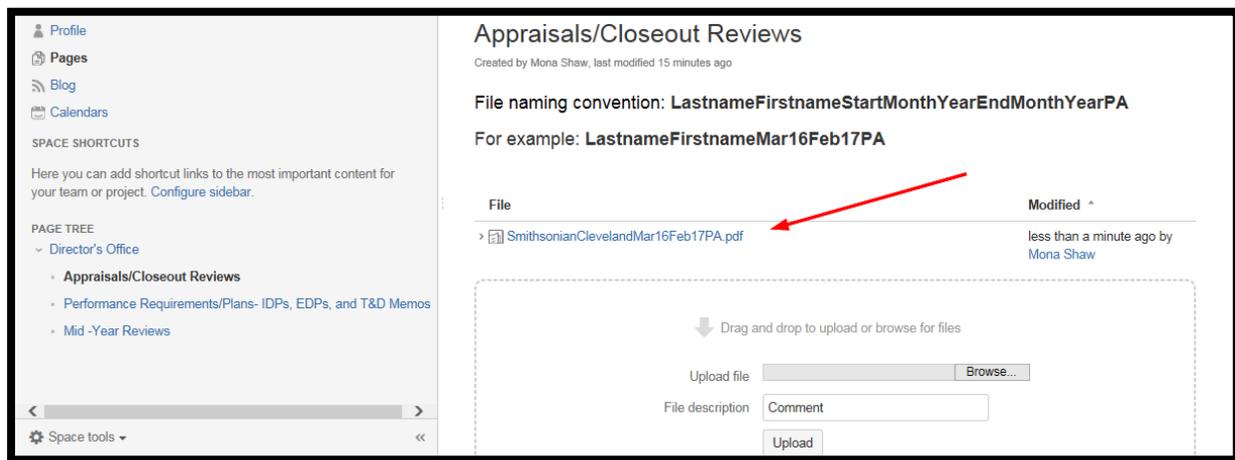
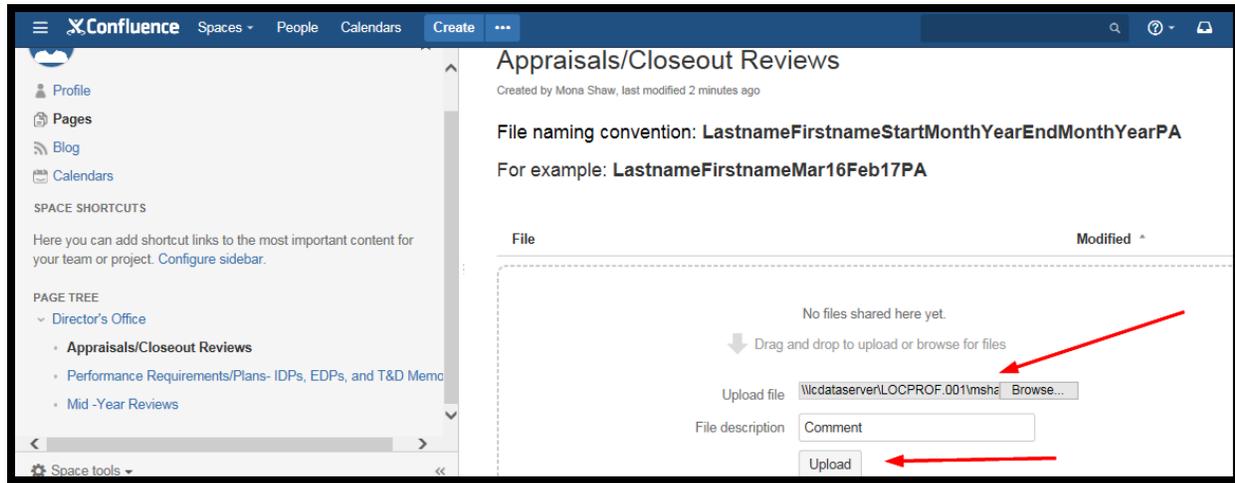
Note: Please note the file naming convention for “Appraisals/Closeout Reviews” files is: **LastnameFirstnameMar16Feb17PA**. The dates are for demonstration purposes only.



- Select the file and click the “Open” button.



- The “Upload File” path will populate with the file path selected. Select the “Upload” button to add to PMR.



- The file is uploaded with the correct file naming convention.

Note: *The SUs are advised to keep the hard copies of the Appraisals/Closeout Reviews for 60 days to ensure that the correct document is uploaded in PMR.*

Repeat the same steps for uploading files for Performance Requirements/Plans and IDPs, EDPs, and T&D Memos and for Mid-Year Reviews.

Note: *Please note the correct file naming convention for performance requirements/plans is: LastnameFirstnameMar17Feb18PR and for the IDPs, EDPs, and T&D Memos is: LastnameFirstnameMar17Feb18DD. The dates are for demonstration purposes only.*

Profile

Pages

Blog

Calendars

SPACE SHORTCUTS

Here you can add shortcut links to the most important content for your team or project. Configure sidebar.

PAGE TREE

- Director's Office
 - Appraisals/Closeout Reviews
 - Performance Requirements/Plans- IDPs, EDPs, and T&D Memos
 - Mid-Year Reviews

Space tools

Performance Requirements/Plans- IDPs, EDPs, and T&D Memos

Created by Mona Shaw, last modified 3 minutes ago

The file naming convention for Performance Requirements/Plans: **LastnameFirstnameStartMonthYearEndMonthYearPR**

For example, **LastnameFirstnameMar17Feb18PR**

The file naming convention for IDPs, EDPs, and T&D Memos: **LastnameFirstnameStartMonthYearEndMonthYearDD**

For example, **LastnameFirstnameMar17Feb18DD**

File	Modified
SmithsonianCleveland0Mar17Feb18PR.pdf	less than a minute ago by Mona Shaw
SmithsonianClevelandMar17Feb18DD.pdf	just a moment ago by Mona Shaw

Drag and drop to upload or browse for files

Note: Please note the correct file naming convention for mid-year reviews is: **LastnameFirstnameMar16Aug17MYR**. The dates are for demonstration purposes only.

Profile

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SPACE SHORTCUTS

Here you can add shortcut links to the most important content for your team or project. Configure sidebar.

PAGE TREE

- Director's Office
 - Appraisals/Closeout Reviews
 - Performance Requirements/Plans- IDPs, EDPs, and T&D Memos
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Mid-Year Reviews

Created by Mona Shaw, last modified less than a minute ago

The file naming convention: **LastnameFirstnameStartMonthYearEndMonthYearMYR**

For example, **LastnameFirstnameMar16Aug17MYR**

File	Modified
SmithsonianClevelandMar16Aug17MYR.pdf	just a moment ago by Mona Shaw

Drag and drop to upload or browse for files

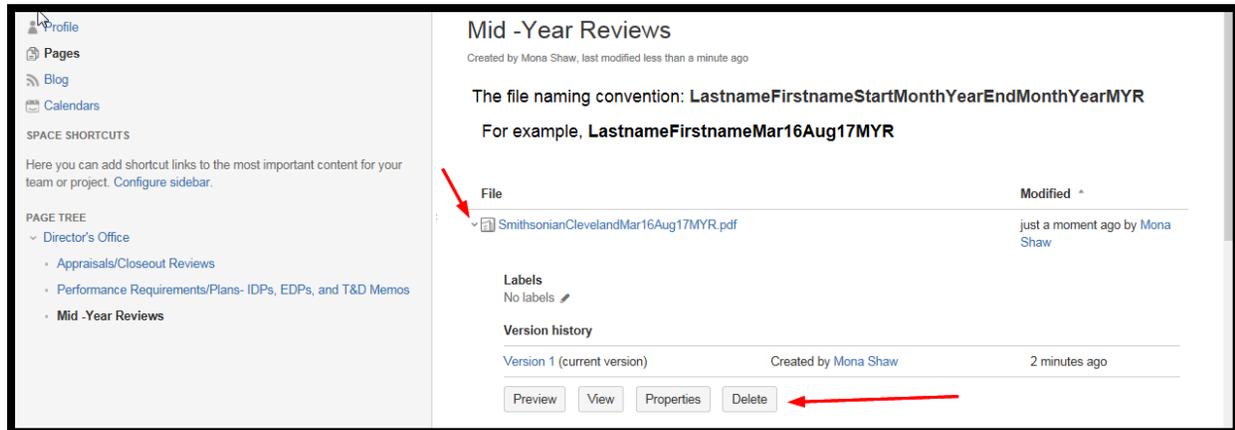
Upload file

File description

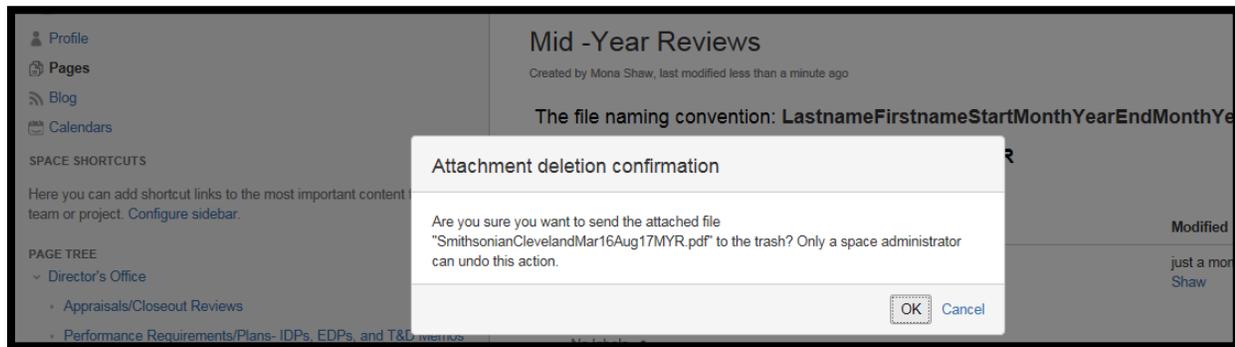
➤ Replacing PDF Documents in PMR

If an uploaded file needs to be replaced, the SU administrative officers are to do the following:

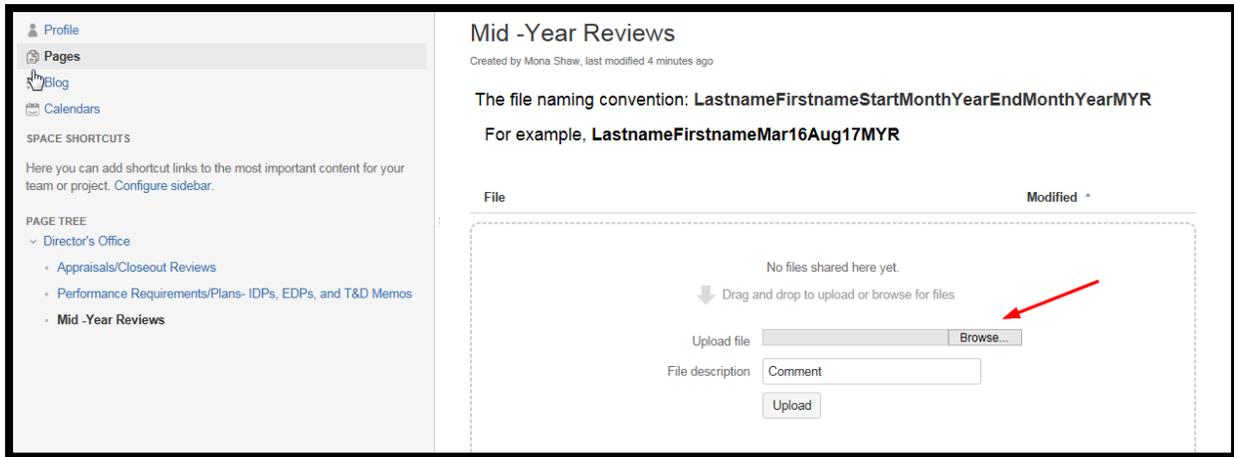
- Click on the icon that is pointing down next to the file name. It will open details about the file that was uploaded previously.
- Click on the “Delete” button to delete the file.



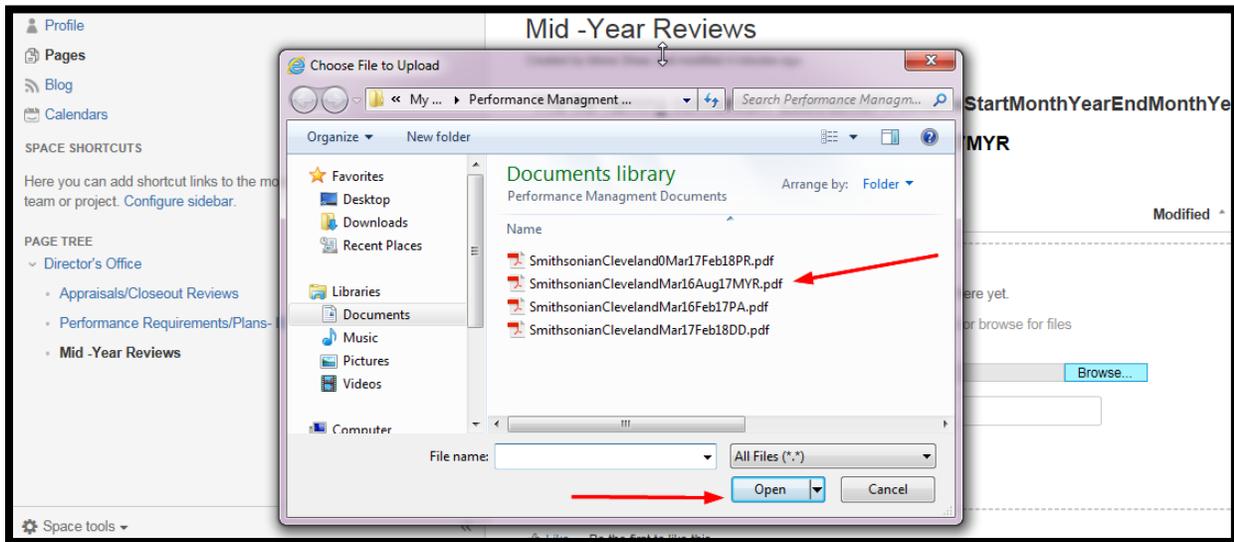
- The “Attachment deletion confirmation” window will display. Select the “OK” button to proceed with the deletion.



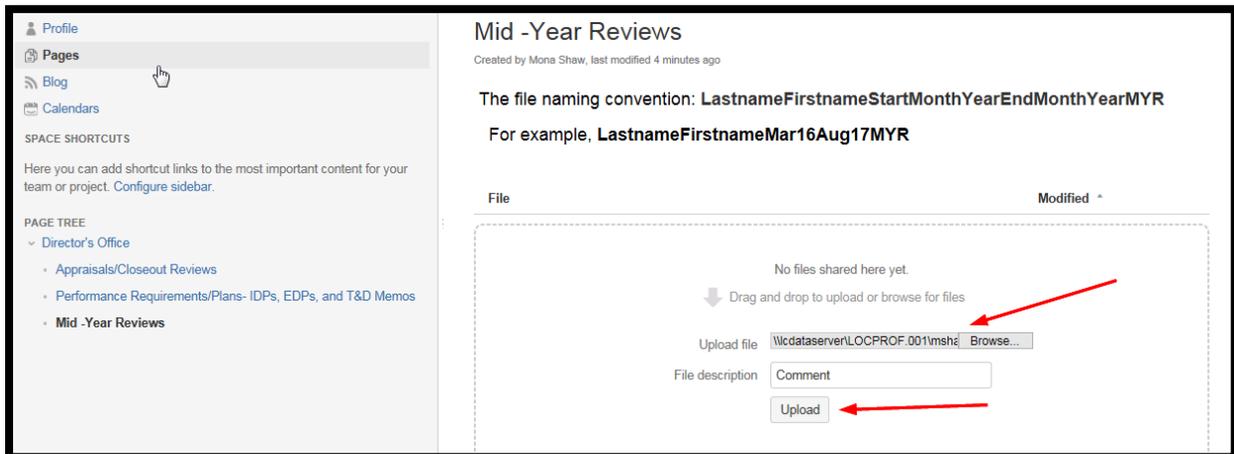
- The existing file is deleted. Select the “Browse” button to select a new file to upload.



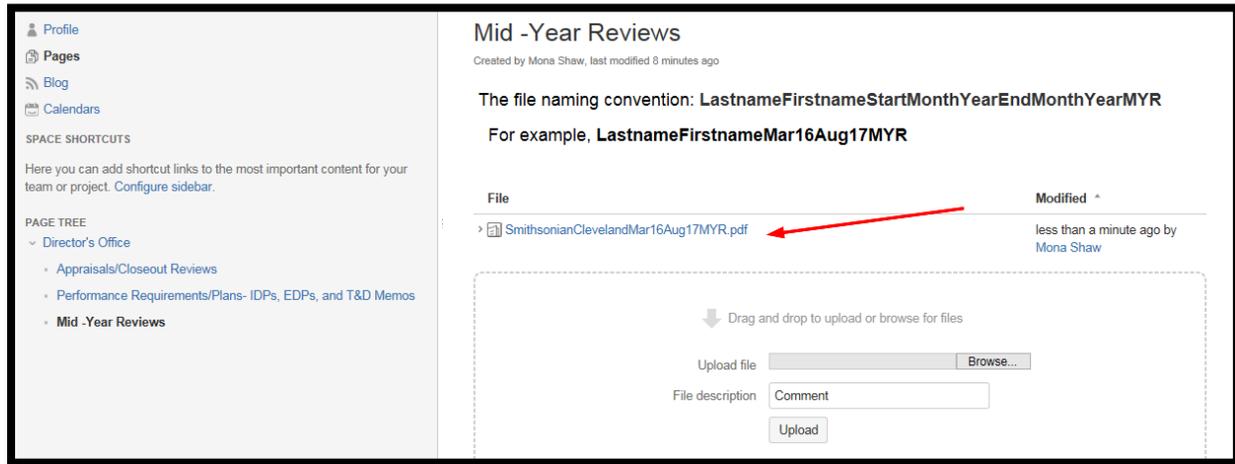
- Select the file to upload and click “Open” button.



- Select the file to upload and click “Open” button.



- The “Upload File” path will populate with the file path selected. Select the “Upload” button to add to PMR.



- The new file is uploaded following the correct file naming convention.