

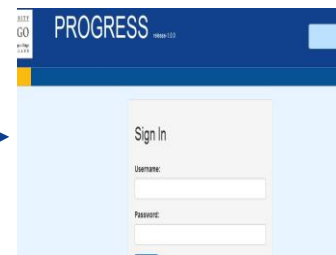
Assigning a Reviewer in Progress

This sheet gives instructions for changing a reviewer in the online system for academic performance appraisals.

The default reviewer is the Head of Department. The Head of Department may wish to assign some reviews to another colleague, for example the direct supervisor. To assign a different reviewer, you need to make a separate change in each review that's being delegated. This change can be made by the Head of Department or by the Divisional Service and Administration staff member who has Progress access for this area.

Logging into your review

Log into [Progress](#) with your University credentials.



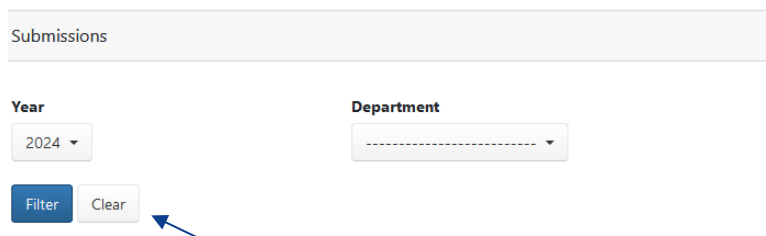
1. View eligible staff review submission



1. Once you have logged in the Progress dashboard will be displayed.

To access the Performance Appraisal submissions, under **Workflow Type** select the performance appraisal.

When selected the workflow type will turn yellow.



2. You will see some drop-down menus in the submission area. Use these filters to view the submissions by year or department. Then click on **filter**.

The list of all eligible staff will appear in the Submissions area.

2. Navigate to the Special Reviewers screen

Actions

You may make bulk decisions or individual decisions by selecting some or all records.

[Bulk Letter Export](#) [Bulk Letter Print](#) [Submit Forward](#)

Legend

- Submission is ready to be submitted.
- Submission is not ready to be submitted. You must edit the submission before submitting.
- Submission may be bulk exported or printed.
- Submission does not have the correct status to submit.

<input type="checkbox"/>	Submitter Name	Workflow Title	Year	Department	School	FTE	Status	Position Category	Overall Outcome
<input type="checkbox"/>	[Redacted]	AFA 1 reviewer test SJE May 2024	2024	Anatomy	School of Biomedical Sciences	1.0	HR Review	LL	Performance Satisfactory
<input type="checkbox"/>	[Redacted]	AFA 1 reviewer test SJE May 2024	2024	Anatomy	School of Biomedical Sciences	1.0	Draft	ARF	To be reviewed

Showing 1 to 2 of 2 entries

1. Click on the staff members name highlighted in blue to access their review submission.

UNIVERSITY OF OTAGO
To Whare Wānanga o Ōtago
NEW ZEALAND

PROGRESS 5.6.2

Submission for Annual Performance Appraisal 2017 01/11/2016

[Dashboard](#) [Export to PDF -](#) [Edit Special Reviewers](#)

PERSONAL DETAILS

2. Click on the button **Edit Special Reviewers** at the top of the submission to navigate to the Special Reviewers page.

At the top of the **Special Reviewers** page, the Reviewers section lists the existing reviewer access for this submission. Below this are the Special Reviewers and Assign Reviewers sections.

If the staff member's submission has gone beyond the status Draft to First Review, click on the Preview button to bring up the Edit Special Reviewers button as above.

3. Enter the Special Reviewer's details

UNIVERSITY OF OTAGO
PROGRESS 642
Special Reviewers for Carole Acheson (4745)

REVIEWERS

Reviewer Position	Special Condition
0	
0	
1	
1	H3
1	H3

READ ONLY REVIEWERS

Name	User	State
Lara Stewart		

SPECIAL REVIEWERS

Enter any Special Reviewers for Carole Acheson (4745) here. Note: only choose reviewer positions that are For instance, if there are default reviewers for positions 1 and 3, then you may only choose First Reviewer.

Reviewer Position*	Username*	Name
<input type="text"/>	<input type="text"/>	
<input type="text"/>	<input type="text"/>	
<input type="text"/>	<input type="text"/>	
<input type="text"/>	<input type="text"/>	

ASSIGN REVIEWERS

First Second

In the **Special Reviewers** area, enter two details to grant access to the delegated reviewer:

- select the Reviewer Position in the drop-down menu (in this case, First Reviewer)
- enter username of the delegated reviewer
- you don't need to put in the email address
- press enter or click **Save**.

4. Assign the Special Reviewer

In the **Assign Reviewers** area at the foot of the page, the new Special Reviewer's name will now appear in the drop-down menu for First Reviewer.

ASSIGN REVIEWERS

First Second

Click on the drop-down menu and select the new Special Reviewer's name and then the **Save** button. The Special Reviewer's name will now appear on the submission as First Reviewer.

5. Let the Reviewer know

You will need to inform the Special Reviewer that their access has been set up and send the review guidelines to them. Progress will not notify the Special Reviewer.

When the Special Reviewer logs in to Progress, they will see the submission assigned to them.

Top Tips and trouble shooting

Can't see the Special Reviewers button

Sometimes the Special Reviewers button is hidden. If the staff member's submission has gone beyond the status Draft to First Review, click on the **Preview** button first to bring up the **Edit Special Reviewers** button.

Do not know the username of the Special Reviewer

You can look up a staff member's username in Outlook Global Address List. In Outlook, go to the Address Book. The search results will show a column headed 'Alias.' This is the username

Select Names: UoO Global Address List

Name	Title	Business Phone	Location	Department	E-mail Address	Company	Alias
Ann-Marie Kelly	HR Advisor	+64 3 479 9263		Promotions & R...	ann-marie.kelly@otago.ac.nz		kelan01p
[REDACTED]					[REDACTED]		antan37p
[REDACTED]					[REDACTED]		chaan01p

Special Reviewer is unable to see the review

- In the Navigation area, check that the Special Reviewer has the correct **User Type** selected.
- In the Navigation area, check that the Special Reviewer has the correct **Workflow Type** selected.
- In the Submissions area, check that there are no unnecessary filters applied.

Navigation

Workflow Type: Annual Performance Appraisal, Biennial Review, Senior Lecturer Review

User Type: Submitter, Reviewer

Submissions

Year: All selected (4)

Department: [Dropdown]

Status: [Dropdown]

Type: [Dropdown]

Submitter Name: [Text Box]

Outcome: [Dropdown]

School: [Dropdown]

Filter Clear

How do I delete a Special Reviewer?

Special Reviewers can be deleted by ticking the delete box in the Special Reviewer area then clicking the Save button at the bottom left of the screen

SPECIAL REVIEWERS

Enter any Special Reviewers for Katie Marcar (10648) here. Note: only choose reviewer positions that are listed above. For instance, if there are default reviewers for positions 1 and 3, then you may only choose First Reviewer or Third Reviewer from the dropdown. Any other choices are ignored.

Reviewer Position*: First Reviewer

Username*: kelan01p

Name: Ann-Marie Kelly

Override Email Address: [Text Box]

Delete