
Assigning a Special Reviewer in Progress

Summary

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

The Annual Performance Appraisal 2020 allows one reviewer for each staff member – 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 of an Assistant Research Fellow. 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 Client Services staff member who has Progress access for this area.

View eligible staff review submissions in Progress Dashboard

1. Log in to [Progress](#) and you will see your Progress Dashboard.
2. To access the Annual Performance submissions, under **Workflow Type** select Annual Performance Appraisal. When selected the workflow type will turn yellow.
3. You will see some drop-down menus in the submissions area. You may need to use these filters, to view the submissions by Year or Department.
4. The list of all eligible staff will appear in the Submissions area.

Navigate to the Special Reviewers screen

5. Click on the staff member's name highlighted in blue, to access their review submission.
6. Click on the button **Edit Special Reviewers** at the top of the submission to navigate to the Special Reviewers page.
7. 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.

Enter the Special Reviewer's details

8. In the **Special Reviewers** area, enter two details to grant access to the delegated reviewer:
 - a. select the Reviewer Position in the drop-down menu (in this case, First Reviewer)
 - b. enter the username of the delegated reviewer
 - c. you don't need to put in the email address
 - d. press enter or click **Save**.

Assign the Special Reviewer

9. 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.
10. 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.

Let the Special Reviewer know

11. 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.
12. When the Special Reviewer logs in to Progress, they will see the submission assigned to them.

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Tips and troubleshooting

I 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.

I don't 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
Anoob Antony					anoob.antony@otago.ac.nz		antan37p
Anoop Chandrasekhar					anoop.chandrasekhar@otago.ac.nz		chaan01p

The Special Reviewer can't 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.

The screenshot shows two main sections: 'Navigation' and 'Submissions'.
In the 'Navigation' section, there are two groups of buttons. The 'Workflow Type' group has three buttons: 'Annual Performance Appraisal', 'Biennial Review' (highlighted in yellow), and 'Senior Lecturer Review'. The 'User Type' group has two buttons: 'Submitter' and 'Reviewer' (highlighted in yellow).
In the 'Submissions' section, there are several filter dropdown menus: 'Year' (set to 'All selected (4)'), 'Department', 'Status', 'Type', 'Submitter Name', 'Outcome', and 'School'. Below these filters are 'Filter' and 'Clear' buttons.

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.

The screenshot shows the 'SPECIAL REVIEWERS' configuration screen. It includes a note: '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.' Below this, there are fields for 'Reviewer Position*' (set to 'First Reviewer'), 'Username*' (set to 'kelan01p'), and 'Name' (set to 'Ann-Marie Kelly'). There is also an 'Override Email Address' field. A 'Delete' checkbox is checked and highlighted with a red box.