

The Performance Management Dashboard - Functionalities and layout

Process: Step 1



Lesson duration

About 15 minutes

What you will learn:

- How to [switch](#) between the employee's Performance Management Dashboard, and that of the manager.
- Understand performance [periods and phases](#).
- How to read your [contract's progress](#), and what your next step would be.

- How to [delete](#) a contract's review period.
- How to [print](#) a contract.
- Understand the [locking](#) of periods and phases.

Additional Functionalities on the Performance Management Dashboard

In previous pages, we discussed some of the functionalities available to employees and managers, but we focused specifically on creating a new Performance Contract.

On this page, we will highlight a few additional functionalities and the general layout of the dashboard screen. In our discussion, we will refer to the screen and pointers below.

The screenshot displays the Performance Management Dashboard interface. The top navigation bar (1) includes a search bar and user profile. Below it, the main content area is divided into sections: 'Timeline' (2) showing a monthly view of review periods and activities like 'Setting of Objectives', 'Check-ins', and 'Ratings'; 'My Progress' (4) with a detailed view of 'REVIEW PERIOD 1' (5) and 'REVIEW PERIOD 2' (6), including instructions and progress bars; and 'OVERALL SUMMARY' (7) at the bottom, which provides a high-level overview of scores and check-ins for each period and the overall final score.

#1. Performance years

At the top of the Performance Management Dashboard you will find a dropdown with the existing and previous performance years. The default value is the current performance year. Page back to historical contracts by choosing the applicable performance year.

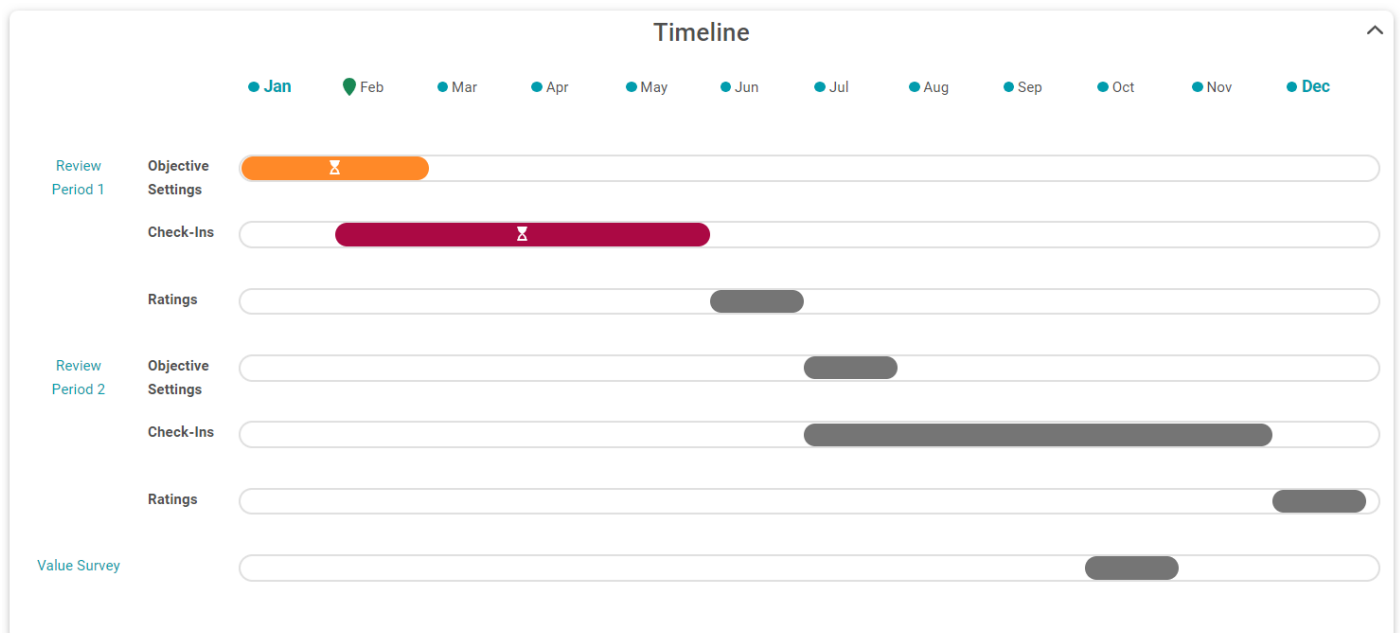


#2. My contract / My team's contracts

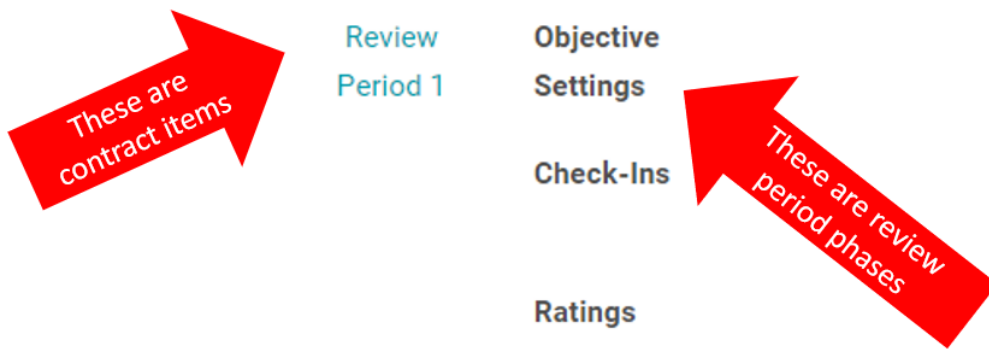
The toggle button is used to easily switch between your Performance Contract, and those of your team - should you be managing a group of people.



#3. The periods and phases in my contract



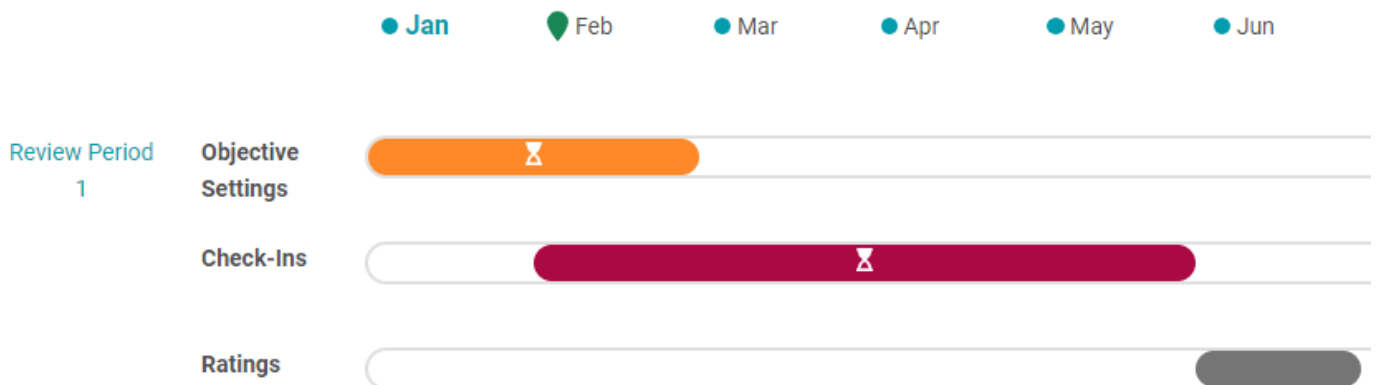
A contract is made up of contract items of which at least one is a review period (containing your performance objectives), and an optional component e.g., a Value Survey.



Each review period comprises two phases: during the **Objective Setting** phase your agreement objectives are determined, and during the **Rating** phase the objectives are evaluated and scored or rated.

Optionally you may have access to a **Check-in** phase which allows the employee and manager to do ad-hoc check-ins (informal evaluations) of the employee's progress in reaching the employee's objectives.

Furthermore, each review period and its phases are time-bound, as indicated by the timeline. Some may be available for access, some may still be locked, as indicated by their grey colour.



If an employee's contract contains more than one review period, the same phases will repeat for each review period.

The optional contract item, called Value Survey above, has only one phase.

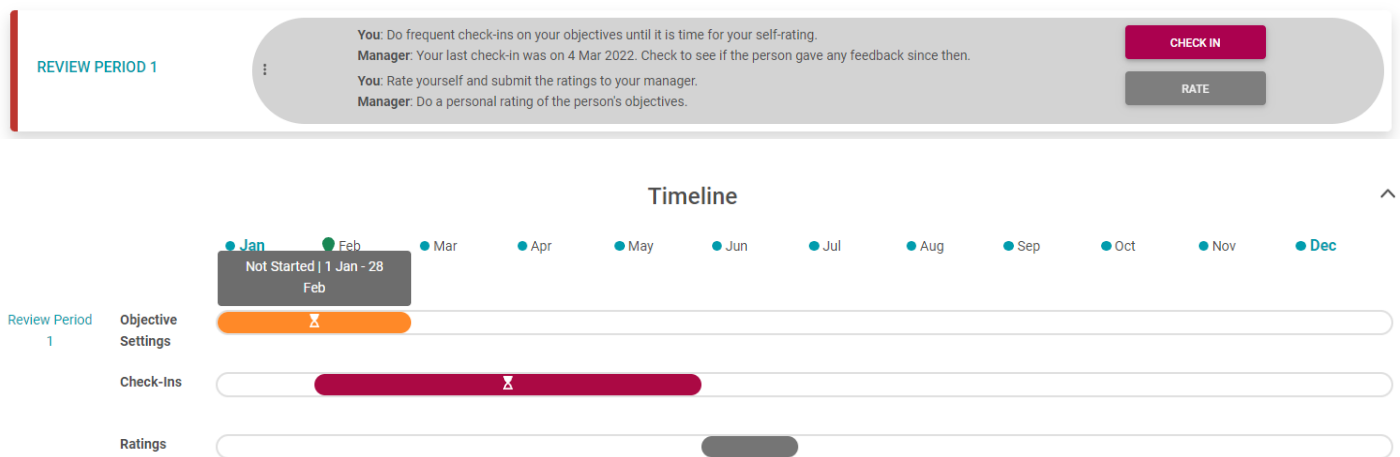


#4. My progress in the review periods

Together, the review periods in your performance contract form your Performance Agreement i.e., the agreement or consensus between you and your manager about your objectives for the year ahead.

Each review period goes through two formal stages (objective setting, and rating) with an optional check-in functionality or phase supporting them. A review period's status or progress must be read with the official timelines in mind. Hover on a review period's progress and date range bar to get the specific dates for a phase.

My Progress



On the images above, note the following:

The instructions about your next step in a phase. Here are a few instructions from the perspective of an employee.

Load, amend and/or confirm the review period's objectives.






Finish setting your objectives and submit them to your manager.

Do frequent check-ins on your objectives until it is time for your self-rating.

Do your self-rating and submit it to your manager.

The countdown to a deadline. As you can see from the Timelines, each phase has a date range. Usually, a review period's phase is only open for changes while you are within the phase date range. Before and after the date range, a phase might be locked.

The action(s) that corresponds with the suggested next step. Here are some of the action buttons you can expect to see.

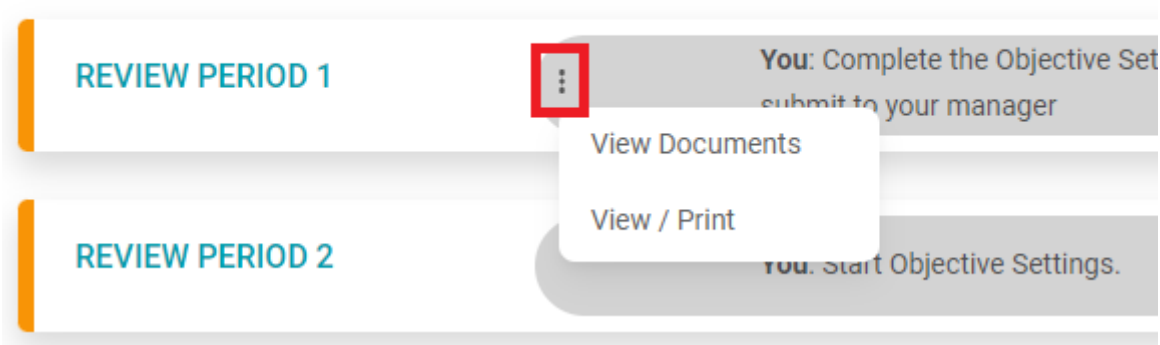
BUTTON	YOUR ACTION
	Click to create your Performance Contract.
	Click to open your agreement's review period and then either add or amend your objectives and/or submit the objectives to your manager.
	Click to open the Check-in functionality where you and your manager can evaluate your progress against your set objectives. A check-in is a more informal evaluation of objectives to give guidance before the formal review is done.
	Click to open your review period and do a self-rating of your performance against each objective. Your self-ratings will become visible to your manager only once you submit the agreement.
	The review period was finalised and closed out. Click to view your manager's personal ratings as well as the final agreement ratings.

#5. Further actions available during a review period

Besides the usual activities during a review period, you also have access to all documents uploaded against KPIs and other objectives in the review period, and to print a copy of your review period.

- Hover over or click the **More** icon (also called **Action Plan**) to reveal any further options you may have.

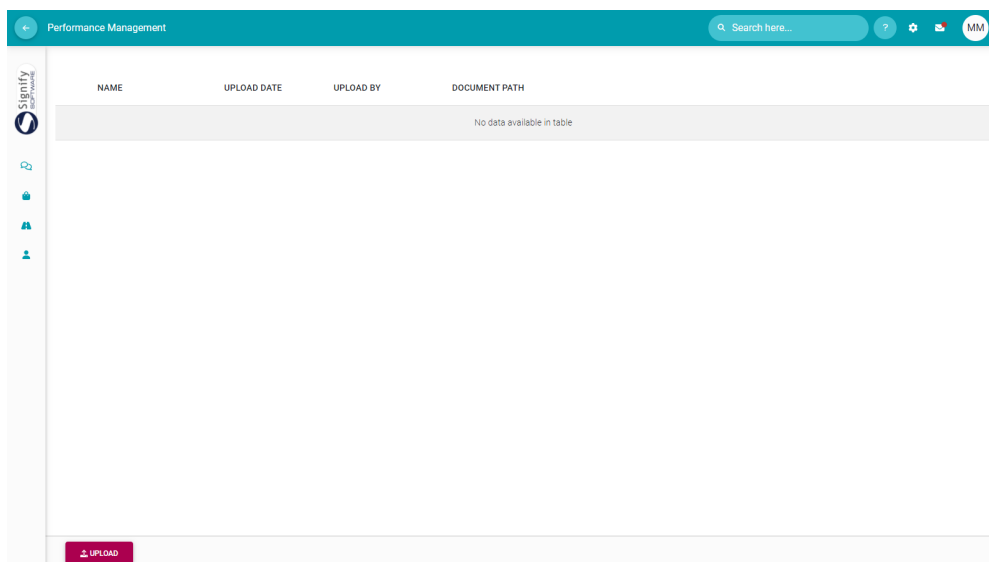
My Progress



View Documents:

All documents uploaded during the contracting period can be found here. They are available for viewing or downloading.

- Click **View Documents** from the review period's **More (Action Plan)** icon options.



View / Print:

Printing a document is standard functionality. Due to the potential size of a Performance Agreement, note the following trick to contain the size of what is going to be printed.

- Click **View / Print** from the review period's **More** icon options.
- While in print preview mode, locate and click the collapse icon to the far right of the section(s) whose content you'd like to hide when printing. For effect, we have collapsed all sections' content, retaining only the section title, percentage weight and scores - if any, and the General Comments section. See the example below.

PERFORMANCE AGREEMENT

Review Year Review Setup Dual Approval	2022 Salaried Employees True	Position Final Rating	Group HR Executive
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REVIEW PERIOD 1 20.00% ^

KEY PERFORMANCE AREAS	0.0 0.0 0.0 70.00% v
STRETCH TARGETS	0 0 0 10.00% v
VALUES & BEHAVIOURS	0 0 0 5.00% v
LEADERSHIP BEHAVIOURS	0 0 0 5.00% v
KEY COMPETENCIES	0 0 0 10.00% v
ACTION PLAN	0 0 0 0.00% v

GENERAL COMMENTS ^

PERSON COMMENT	MANAGER COMMENT
I am not comfortable using the company HR and payroll systems for data validation as these are also outdated.	

Delete Objectives:

Your Performance Contract's number of review periods is fixed. Therefore, clicking the **DELETE** button below does not delete the review period; it clears out all objectives you may have loaded into any section of your agreement.

REVIEW PERIOD 2 You: Load, amend and/or confirm the review period's objectives. **31 Jul 2022** (4 Months Remaining) 

- Once clicked, follow the on-screen instructions to delete the objectives.
- Note that a review period can only be deleted if it has not yet been approved.

Performance Management

2022

MY PERFORMANCE CONTRACT MY TEAM IN SALARIED EMPLOYEES

Timeline

Jan Feb Mar Apr May Jun Jul Aug Sep Oct Nov Dec

Review Period 1

Objective Settings

Check-Ins

Ratings

Delete Contract Period

The item will be removed permanently. This action cannot be undone.

Delete Reason

Used the wrong template and need to recreate the contract

I acknowledge & agree

CANCEL DELETE

REVIEW PERIOD 1

You: Complete [review period] and submit to your manager

28 Feb 2022 (4 Days Remaining)

CONTINUE

OVERALL SUMMARY

Review Period 1(100%) Overall Final Score

0.00 0 0

Scores Check-Ins

#6. If something seems locked



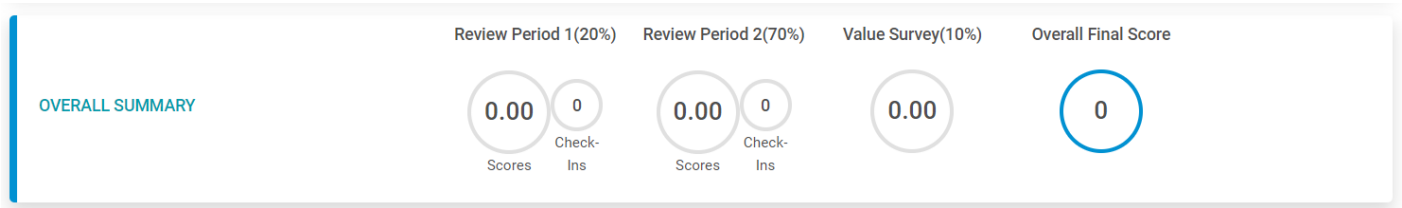
If you find a lock symbol or icon in a review period, it means your manager or employee is busy working on the review period, either loading objectives or scoring the objectives. Only one person is allowed to work in a review period at any given moment.

#7. In summary

When a contract has been finalised, it implies the following has been done. This is shown in the Overall Summary part of the performance dashboard.

1. All the review periods have been populated with objectives - and approved by the manager.
2. All the review periods have been rated - and approved by the manager. (There is a score for each period)

3. If applicable, the scores from any additional components (e.g., a Value Survey) have been entered into the system and incorporated into the employee's contract.
4. A final overall score was calculated and is available.



Recommended further reading

- [Glossary](#) of terminology and definitions
- [How to Use Performance Management with Success](#)
- [The Employee's Performance Management Dashboard](#)
- [Open an Existing Contract](#)
- [Create a New Contract](#)
- [Functionalities and Layout of the Performance Management Dashboard](#)
- [The Manager's Performance Management Dashboard](#)
- [Overview of The Performance Agreement Screen](#)
- [Set your objectives - Part 1 \(Working with KPAs and KPIs\)](#)
- [Set your objectives - Part 2 \(Working with the other sections\)](#)
- [Perform a Check-in](#)
- [Rate your objectives](#)



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