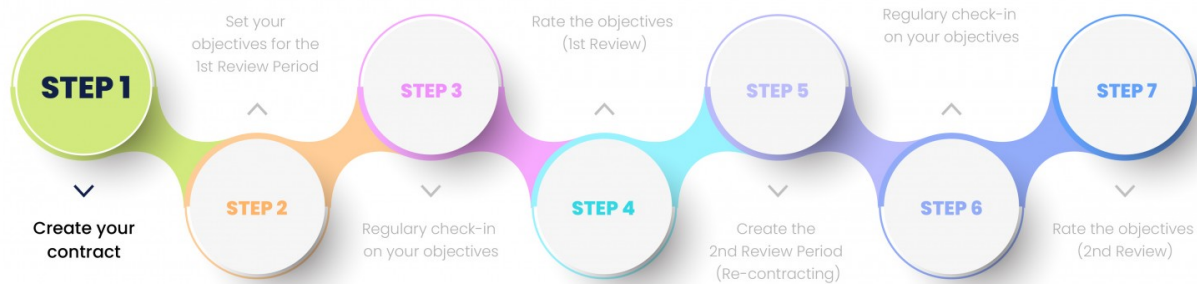


The Performance Management Dashboard - For Managers

Process: Step 1



Lesson duration

About 15 minutes

What you will learn:

- What managers can do on their dashboards.
 - How to switch between groups of people.
 - How to know what to do when managing contracts.
 - How to access employee contracts.
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The Performance Management Dashboard for Managers

Every user forming part of the Performance Management process gets access to their own Performance Management Dashboard. If a person manages other users or employees, the person fulfils the role of performance manager and gets access to a Performance Management Dashboard for Managers.

The activities described below are from the viewpoint of a performance manager, assisting their employees during the performance management process. Except for the submission of objectives (done by an employee themselves) and the submission of self-rated objectives (also done by an employee), a performance manager has control over all aspects of an employee's Performance Contract. If you are a performance manager, we recommend also viewing [The Performance Management Dashboard for Employees](#) section. On this page, we will focus on additional functionalities only.

The screenshot displays the Performance Management Dashboard for Managers. At the top, there is a teal header with the text "Performance Management" and a search bar. Below the header, a dropdown menu shows the year "2022" and a button labeled "MY TEAM IN SALARIED EMPLOYEES". The main content area is titled "Timeline" and shows a horizontal timeline with months from Jan to Dec. Below the timeline, there are two "Review Period" sections. Review Period 1 is for "Setting Of Objectives by" with a deadline of "31 Mar 2022" (2 Weeks Remaining). It lists two employees: Jolanda Brustle (SZ007) and Marilize Fourie (SZ003). Jolanda Brustle has a "START" button, and Marilize Fourie has "CHECK IN" and "RATE" buttons. Review Period 2 is for "Setting Of Objectives by" with a deadline of "31 Jul 2022" (4 Months Remaining). It lists Marilize Fourie (SZ003) with a "CHECK IN" button. The dashboard also features a sidebar with navigation icons and a user profile "EE" in the top right corner.

What can a manager do on the Performance Management Dashboard for Managers?

Manage their own Performance Contract (in their capacity as a regular user).

Manage the performance contracts of the manager's own, direct reporting lines.

Manage the performance contracts of ad-hoc groups of people - if assigned to this manager.

Create a new performance contract for their employees.

View existing and previous Performance Contracts of employees.

Determine the progress of a Performance Contract phase of an employee and determine the next step.

Get overall progress stats for his/her department.

Print employee contracts.

Perform Check-ins on employee performance agreement objectives. And view the reply from the employee.

#1 Switch between groups of people

A performance manager has access to their own Performance Management Dashboard, similar to those of other users, as seen below. However, a manager can also switch to a separate view which allows for the management of the Performance Contracts of other users.

My Performance Contract **My Team in Executive Management** My Team in Senior Management

- At the top of the dashboard page, select the applicable performance year, then click the toggle button to switch to the contracts of that team.

Performance Year 2022

MY PERFORMANCE CONTRACT

MY TEAM IN 2022 CAREER CONVERSATION (RATED)

The view displays the regular performance cycle timeline, as well as a list of employees or users in the selected group.

Note that you could have access to 3 types of people or people groups via the toggle button. Although the groups - and your responsibilities towards them - may differ, you have the same access (features and functionalities) to the individuals.

Your own Performance Contract

Employees reporting to you as their direct line or performance manager.

Employees in other groups (e.g. Senior Management). These do not necessarily report to you, but you might be responsible for their Performance Management.

#2 Where should you focus?

Managing several employees with contracts in various stages and phases of the Performance Management cycle can be daunting.

We took the guessing out of the management by grouping the employees according to the following phases. Just note the phases will repeat for each review period in the Performance Contract.

As a manager, you can assist with every step, but in the tables below, we assume the employee will perform their tasks to the fullest.

This employee is in the Objective Setting phase.

Review Period 1

1 people to do **Setting Of Objectives** by **31 Mar 2022** (2 Weeks Remaining)

JV **Jolanda Brustle (SZ007)** Payroll Administrator

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

START

And this is what is supposed to happen.

EMPLOYEE'S ACTIONS	THE MANAGER'S ACTIONS
<ul style="list-style-type: none">• Create their Performance Contracts.• Discuss and confirm their objectives with the manager• Load the objectives into the agreement.• Submit their agreement for your approval.	<ul style="list-style-type: none">• Discuss and confirm the objectives with the employee.• Approve the agreement.

This employee is in the Rating and Check-in phase.

1 people to do **Ratings & Check-Ins** by **30 Jun 2022** (3 Months Remaining)

ML **Marlize Fourie (SZ003)** Group HR Executive

You: Your last check-in was on 4 Mar 2022. Check to see if the person gave any feedback since then.
Person: Do your self-rating and submit to your manager.
You: Do a personal rating of the person's objectives.

CHECK IN
RATE

And this is what is supposed to happen.

EMPLOYEE'S ACTIONS	THE MANAGER'S ACTIONS
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- Reply and act on any Check-in guidance the manager may have given if the Check-ins are open.
- Do a self-rating on their objectives once the rating phase is open.
- Submit the self-ratings.

- Do occasional Check-ins on employee objectives, and guide as needed, if the check-ins are open.
- Do a personal rating of the employee's objectives once the rating phase is open.
- Discuss the employee's self-rating versus your personal ratings, then provide the objectives' final ratings.
- Approve the review period.

#3 Access the agreements of employees

If employees have been linked to a manager, the manager can perform all actions on the employee Performance Contracts, except submitting the objectives and ratings.

1 people to do **Setting Of Objectives** by
31 Mar 2022
(2 Weeks Remaining)
^



Jolanda Brustle (SZ007)
Payroll Administrator

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

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

⌛ **START**

The following actions are at the manager's fingertips.

⌛ **START**

Click **START, CONTINUE, RATE,** and/or **VIEW** - or whatever the phase requires.



Click **DELETE** to clean out all the review period's objectives and start over.



Click the **More** or **Action Plan** icon to print the contract, and to see all uploaded documents.

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](#)



Revision #38

Created 2022-02-09 09:05:53 UTC by Eduard

Updated 2026-02-16 13:23:29 UTC