



Performance Appraisal Job Aid for Managers – Dashboards

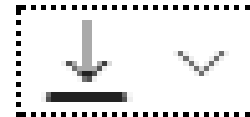
My Team's Performance Forms & My Team's Annual Performance Appraisal Ratings

My Team's Performance Forms – Route Step Progress	
<p>From the Home page click the My Team's Performance Forms tile.</p> <p>Your team displays.</p> <p><i>Tip: the first time you see this tile, it may be blank click on the middle of the tile.</i></p>	
<p>Click on the portion of the pie chart for more details or select all</p>	

The individual form will show in the chart below the pie chart

Form ...	Subje...	Subje...	Subje...	Docu...	Subje...	Subje...	Subje...	Overa...	Curre...	Curre...
Perfor...	Gov P...	PCPD...	N/A	8506	EMP_...	Natasha	Abbot...		Self-A...	Abbott...
Perfor...	Gov P...	PCPD...	N/A	8756	EMP_...	Natasha	Abbot...	3 - Su...	1:1 Re...	Ander...
Perfor...	Gov P...	PCPD...	N/A	7650	EMP_...	Natasha	Abbot...		Mana...	Ander...
Perfor...	Gov P...	PCPD...	N/A	8789	EMP_...	Michael	Alexa...		Self-A...	Alexa...

Click the **Export icon** to download into an Excel or CSV spreadsheet



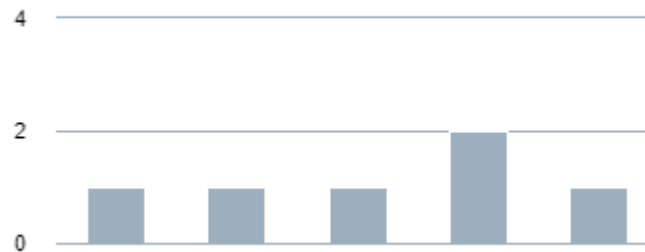
My Team's Annual Performance Appraisal Ratings

From the **Home** page click the **My Team's Annual Performance Appraisal Ratings** tile.

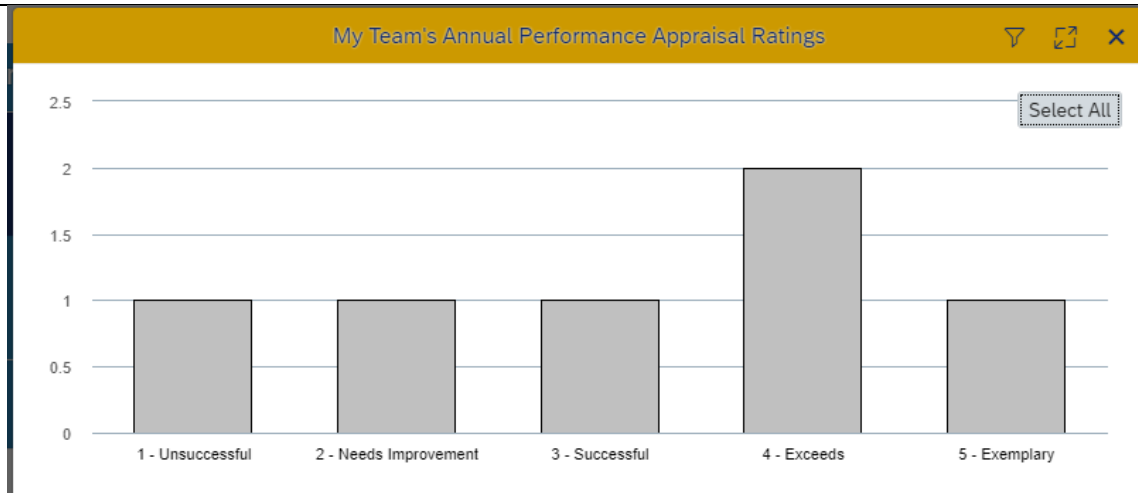
Your team displays.

Tip: the first time you see this tile, it may be blank click on the middle of the tile.

My Team's Annual Performance Appraisal Rati...



Click on the portion of the bar graph for more details or select all

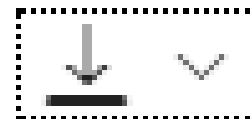


The individual form will show in the chart below the bar graph

↓ ▾

For...	Sub...	Sub...	Sub...	Doc...	Sub...	Sub...	Sub...	Sub...	Ove...	Curr...	Curr...	Ma...
Perf...	Arts...	IAC ...	1 - All	9582	EE_...	Mic...	EE -...	RDe...	3 - ...	App...	XXT...	RDe...
Perf...	Arts...	IAC ...	1 - All	9580	DR1...	Jere...	DR1...	RDe...	2 - ...	App...	XXT...	RDe...
Perf...	Arts...	IAC ...	1 - All	9578	IP3_...	Gab...	IP3 ...	RDe...	5 - E...	App...	XXT...	RDe...
Perf...	Arts...	IAC ...	1 - All	9579	IP2_...	Gale	IP2 ...	RDe...	4 - E...	App...	XXT...	RDe...
Perf...	Arts...	IAC ...	1 - All	9581	IP1_...	Kevin	IP1 ...	RDe...	4 - E...	App...	XXT...	RDe...

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My Team's Performance Forms – Manager Visibility

To expand visibility of hierarchy, click the filter on either dashboard




Click the **Report Type** drop down list and choose **Team View**

▼ Standard


Report Type

- Other Filters
- Team View**
- Matrix Reports
- Custom Reports
- HR Reports
- Other Filters

Date in Position

All values are selected. 

Department

All values are selected. 

Classified Status

All values are selected. 

Click the **Levels drop down list** and choose the level of visibility.

Click **Apply Filters**

Tip: most common options are "direct reports" or "all levels". You may only have these two levels or you may have more depending on your hierarchy.

Team Goal Status

Standard

Report Type: Team View

Starting From: Logged In User

Levels: All Levels (dropdown menu open showing: Direct Reports, Level 2, Level 3, Level 4, Level 5, Level 6, Level 7, Level 8, Level 9, All Levels)

Department: All values are selected.

Classified Status: All values are selected.

Performance Visibility: All values are selected.

Goal Plan: 1 selected

Buttons: Cancel, Apply Filters

Scroll down and click **Select All**

All employee goals in that level should now show

Form Template Name: 2 selected

> More

Buttons: Cancel, Apply Filters, Select All

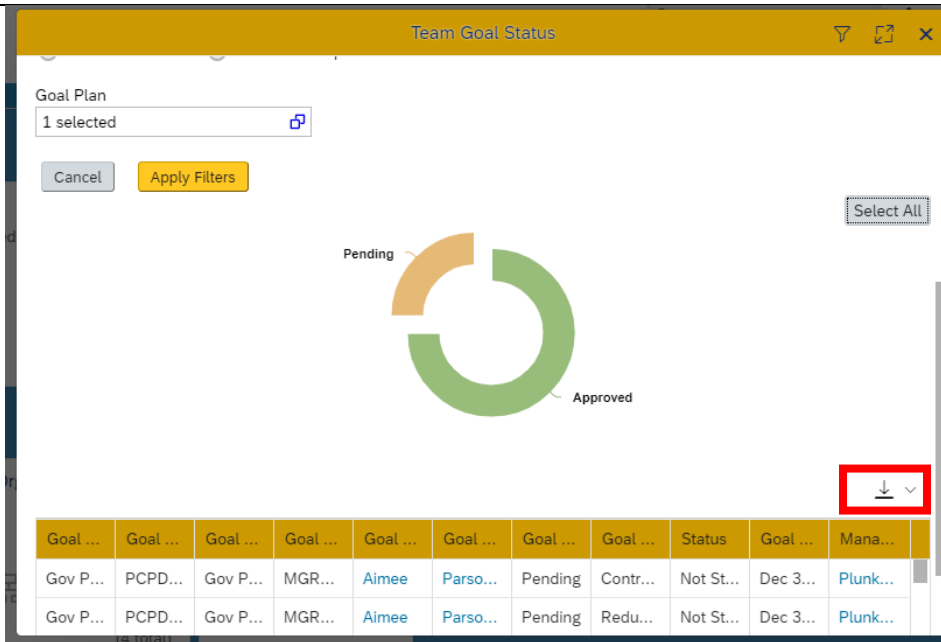
Self-Assessment

1:1 Review

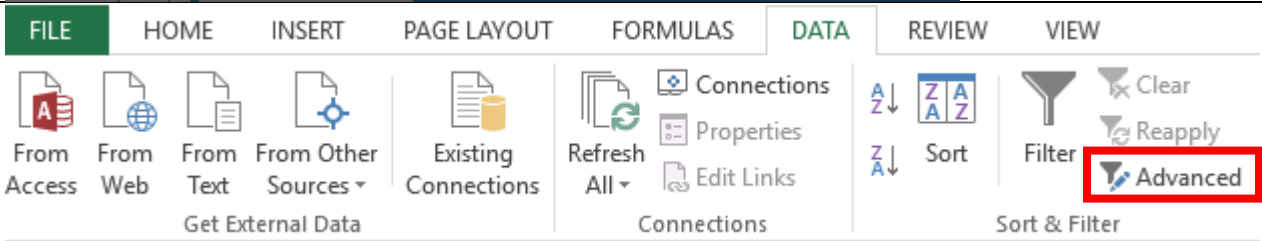
Manager Assessment

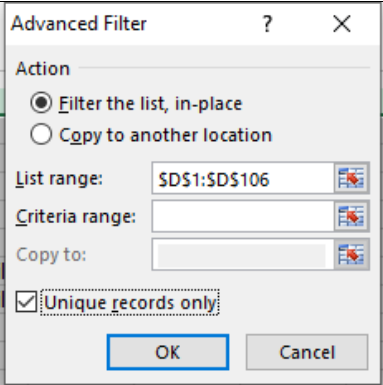
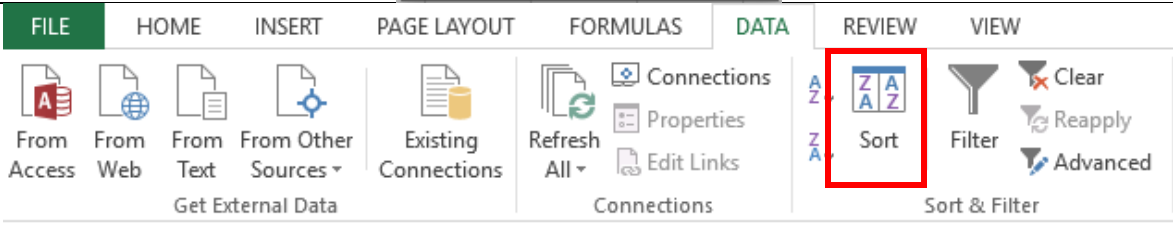
How to Filter the Report

Download the report into an Excel spreadsheet



Select the Data Tab → Advanced



<p>List Range: Highlight the Owner Employee ID (column D)</p> <p>Click Unique Records only</p> <p>Select OK</p>		
<p>Sort by Manager Email</p>		
<p>Check: My data has headers</p> <p>Sort by: Manager Email</p> <p>Click: OK</p>	