Division Performance Contact Dashboard Instructions

GOAL SETTING

As the Performance representative for your division, you will have access to View Dashboard in the left-hand menu bar of the Performance system.

Performance Planning

| My Goals | View Dashboard |

Clicking on View Dashboard opens filters for you to sort your results.

On the left panel -
- **HR Rep:** Ignore it
- **Approver:** Search by Supervisor
- **Department:** Search by Departments (although all departments show, you will only have access to those within your division)
- **Team Member:** Search by Employee

On the right panel -
- **Pending Action:** Search by tasks that are pending – Assign Goals and Set Goals are the only two pending actions you can search for. Employees with no “to-dos” are excluded from the dashboard.
- **# Goals:** Search by the number of goals the employee has set and/or manager has assigned
- **Plan Period:** Search by current goal period
- **Due Date Range:** Search by tasks that are due during a specific period of time (helpful to see everyone who has a task due in the next week)

*If you are going to send reminders through the system, you can control whether the reminder goes only to the employee or manager (approver) or to both of them.

Options

Send Remind to: ○ Team Member ○ Approver ○ Both

You then have the capability to customize the email.

Results:

- Supervisor
- Employee
- Tasks in To Do List
- Ignore
- Current Plan Period
- Send Reminder Emails

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APPRAISAL

As the Performance representative in your division, you will have access to the Appraisal Dashboard in the left-hand menu bar of the Performance system.

Clicking on **Appraisal Dashboard** opens filters for you to sort your results.

**Results:**

- Filter by Step in Process
- Filter by Current Reviewer Period
- Filter by Employee
- Filter by Manager
- Filter by Department
- Filter by Job Title
- Show Active Employees only
- Due Date for Task
- # of Goals
- Search for all Tasks that are Active or only those Past Due
- Uncheck this to see Closed Appraisals

* Reminder emails are sent to the employee only and are not customizable - they are the same email that is sent for that step of the appraisal.

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