

Dashboards

TWO MINUTE GUIDE TO PERFORMANCE & TALENT MANAGEMENT

Dashboards provide a powerful way to gain visibility and oversight into performance. In this guide, learn about your Dashboard choices and how to customize them to your needs.

It's easy

1 Select a Dashboard

Click the Reports tab. Select a Dashboard from the drop-down menu.

2 Refine as Needed (See spotlight below)

Filter the data available by date, department, locations, and companies.

3 Update the Results

Click on the  button to refresh the data displayed in the charts.

4 Drill Down to Access Details


Click on a chart to reveal the underlying report detail. The Reports View (see image lower right) enables managers to access performance details.


5 Analyze the Data


Expandable Filter and Date menus enable complete control and segmentation of the data. Use the display options to add and remove relevant columns from the results table.

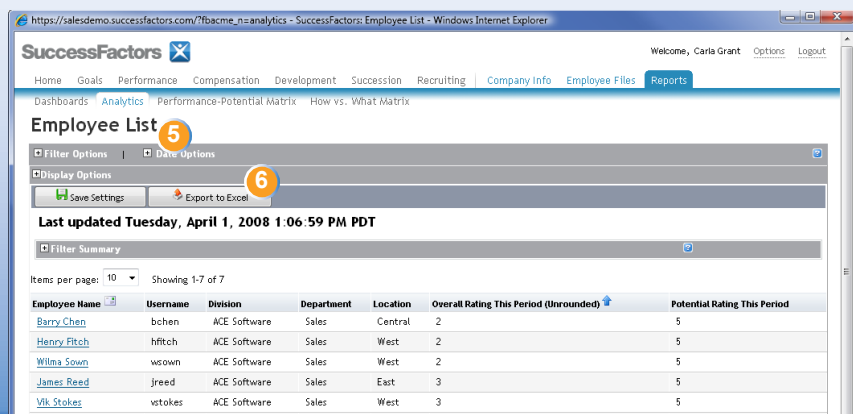
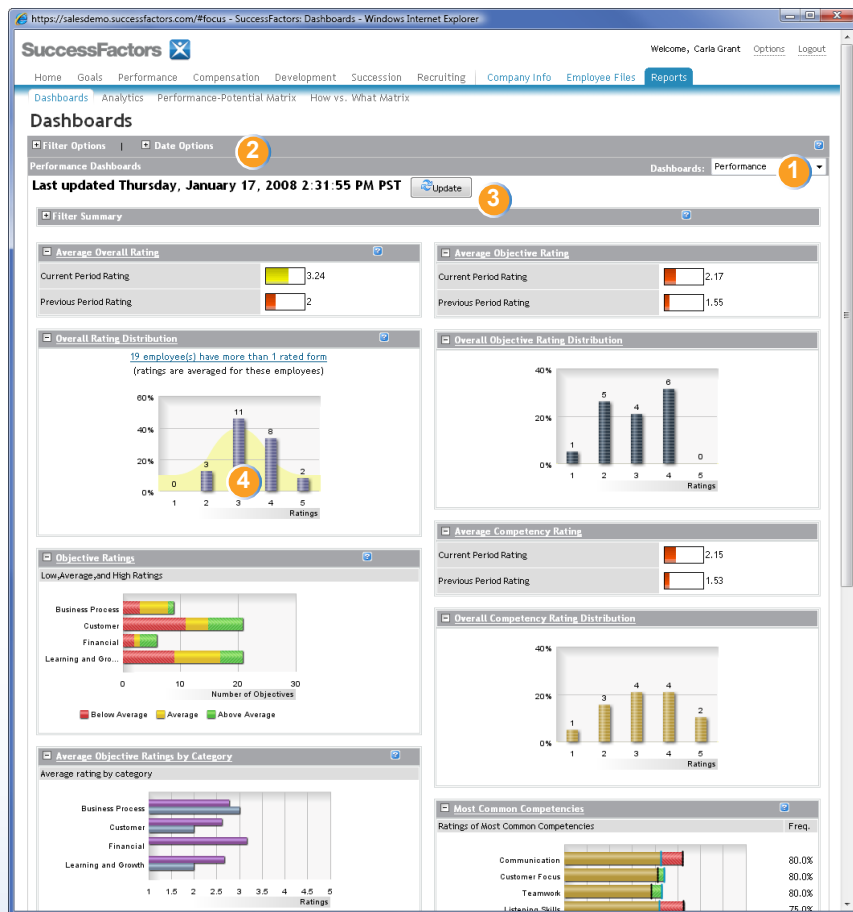
6 Take Action

Once in Reports, you have these helpful additional options:

 **Send Email** - communicate directly with the participants listed in the report.

 **Export To Excel** - export the report table to Microsoft Excel for additional analysis.

 **Save Settings** - save the report setting for easy access at a later time.




Employee Name	Username	Division	Department	Location	Overall Rating This Period (Unrounded)	Potential Rating This Period
Barry Chen	bchen	ACE Software	Sales	Central	2	5
Henry Fitch	hftch	ACE Software	Sales	West	2	5
Wilma Sown	wsown	ACE Software	Sales	West	2	5
James Reed	jreed	ACE Software	Sales	East	3	5
Vik Stokes	vtokes	ACE Software	Sales	West	3	5

Spotlight:

How to Spot Trends

Filter options enable managers to filter result sets by date, department, locations, companies, and reporting level. Dashboard and Reports display results by team and area enabling managers to spot trends and exceptions.

To use filters:

1. Click the **Filter Options** expand button.
2. Select the reporting structure to report on using the show criterion.
3. Use View Filters to segment areas of the organization.
4. Click the  button to refresh results.

