TM-00.1 CABQ - Viewing and Customizing the Manager Dashboard

Step	Action
1.	Click the **Main Menu** item to begin navigation. Main Menu ⌄
2.	Click the **Manager Dashboard** menu.
3.	The Manager Dashboard is broken out in boxed areas that are referred to as **Pagelets**. Many actions can be performed from these pagelets. They also provide alerts and easy access to employee information.
4.	**Alert Pagelet** Use this pagelet to view past or upcoming events and dates related to your direct reports. These alerts are grouped by alert level: critical appearing first, then by all warning alerts, and finally informational alerts. Within each level, the pagelet then sorts the alerts by type. There are seven alert types delivered for the Alerts pagelet: • ePerformance • eCompensation • Expiring Licenses/Certificates • Expiring Memberships • Scheduled Training • Birthday Alerts • Anniversary Alerts
5.	All alerts are time sensitive and the system generates them by comparing the current date to the date specified for each alert type and level. **<alert message link>** Click the link of any of the alert messages to have the system display the appropriate application detail page to provide more information about the alert. These secondary pages are view only. **View All** Click this link to open the More Alert Information page and view all alerts associated with your direct reports.

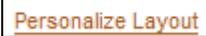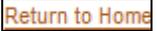| Step	Action
6.	**Pending Approvals Pagelet** The Pending Approvals pagelet displays time sensitive approvals requiring action by the manager. Use this pagelet to view the pending approvals for your direct reports and determine what approval actions must be taken right now. When there are no pending approvals in your queue, then the Pending Approvals pagelet will display the text *No approvals are pending at this time*. For more detail on how to approve employee submissions to Person Profile refer to the **TM-03.3 CABQ - How to Approve Employee Submissions** course.
7.	**Direct Line Reports Pagelet** The Direct Line Reports pagelet displays data about a manager's direct reports from information stored across the HCM product line. Managers can view various details about their employees from this single location. Managers will use this pagelet to view job details, contact information, career and succession plans, compensation, performance reviews, and time tracking for their direct reports.
8.	**Summary Tab** The Summary tab displays a high level overview of employee's and their job titles. Displays the employee's full name. Click the employee's name link in the Name column to access the Talent Summary page for a person. The Talent Summary page displays various pagelets displaying much of the information available in the Direct Line Reports grid in greater detail.
9.	Click the **Job Details** object. Job Details
10.	**Job Details Tab** The Job Details tab displays information about the employee's current job and work history. The Employee ID and Job Code are also located on this tab.
11.	Click the **Contact** object. Contact
12.	**Contact Tab** The Contact tab displays different methods for contacting an employee. The employee's preferred phone number and email that appear on this page come from personal data in HR.
13.	Click the **Compensation** object. Compensation
14.	**Compensation Tab** The Compensation tab displays how employees fit into the salary range for their jobs.
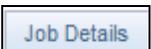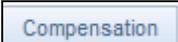
Step	Action
15.	Click the **Performance** object. Performance
16.	**Performance Tab** The Performance tab displays the latest performance review information for a manager's employees.
17.	Click the **Time** object. Time
18.	**Time Tab** Displays the number of vacation or sick hours available to the employee and balances are retrieved from the PeopleSoft Time and Labor module.
19.	**Don't like using the tab format?** There is another view option available to you. Click the **Show all columns** button.
20.	This view displays the same information in a column format. There is too much data to display on one screen view. To view all information for an employee you will need to use your bottom scroll bar to scroll to the right (instead of going from tab to tab).
21.	After scrolling to the right, you will be able to view the rest of the information.
22.	You can return to the Tab format view at any time. Click the **Show tabs** link.
23.	The **Actions** link is available on every tab view. Click the **Actions** link. ▼ Actions
24.	The first link option is **Job and Personal Information**.
25.	When you click on the Job and Personal Information link the **Request Reporting Change** link appears.
26.	The second link option is The first link option is **Development**.
27.	When you click on the **Development** link the following options display: 1. View Current Team Profiles 2. View Team Historical Profiles 3. View Team Interest Lists
28.	The third link option is **Performance.**
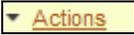
Step	Action
29.	When you click on the **Performance Management** link the following options display: 1. Create Performance Document 2. Create Development Document 3. Open Performance Documents 4. Open Development Documents City Performance and Development Documents are combined. You will use **Create Performance Document** and **Open Performance Documents**.
30.	The Talent Summary page provides managers with a comprehensive view of talent data related to an individual employee through the use of a dashboard. With the Talent Summary pagelets, managers have access to an employee's talent data from one location instead of accessing several components separately. Click the **View in Talent Summary** menu. View in Talent Summary
31.	Use the Talent Summary page to manage and analyze information about your workforce. This page enables you to: • View an employee's profile details such as competencies, responsibilities, and certifications. • View employee compensation data and compare it to the job salary range. • Analyze performance history. • Assess your staff's learning and education.
32.	Click the **Return To Manager Dashboard** link. Return To Manager Dashboard
33.	**Objective Alignment Pagelet** Displays a narrow graph illustrating the number of employees that are in alignment with the department business objectives.
34.	**Company Directory Pagelet** The Company Directory pagelet enables managers to search for employees in the company directory. **My Open Jobs** The My Job Openings pagelet displays all job openings assigned to the manager.
35.	You can personalize your view on the Manager Dashboard. Click the **Content** link. Content

Step	Action
36.	Use this page to select or deselect pagelets you want to display on your Manager Dashboard page. Click the pagelet name link to preview the pagelet. Click the **Personalize Layout** link. Personalize Layout
37.	Use the Personalize Layout: Manager Dashboard page to define the Manager Dashboard pagelet layout by selecting either a 2- or 3-column layout style you wish to display on your Manager Dashboard page. Identify the pagelets that should appear in each column. Use this page to determine the number of columns you want on the dashboard. Move pagelets from one column to the next. The columns will list only those pagelets you have selected on your personalization page to appear on the dashboard. As an example, click the **Direct Line Reports** list item. Direct Line Reports
38.	Click the **Move Right** button.
39.	Direct Line Reports would not appear in the 3rd column. If you want to move it back where it was just click the **Move Left** button.
40.	If you want to Save your changes you would use the **Save** button. In this training we are just exploring and want to return to the Home page. Click the **Return to Home** link. Return to Home
41.	You are back at the Manager Dashboard. Click the **Home** link. Home
42.	Congratulations! You have successfully completed the **Viewing and Customizing the Manager Dashboard** course. **End of Procedure.**