

Performance Management in Microsoft Dynamics 365

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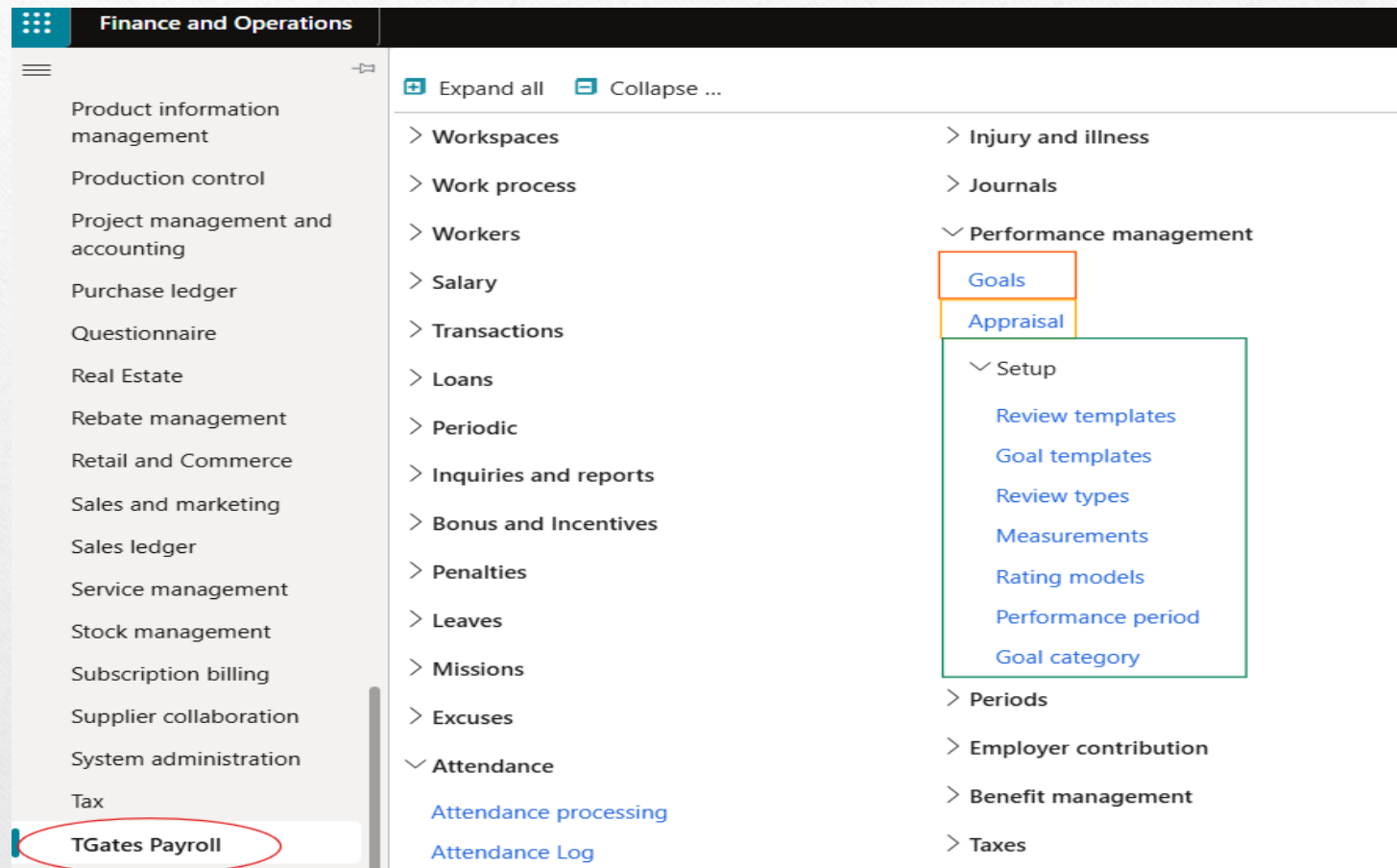
What is Performance Management?

- A module in Dynamics 365 used to evaluate and track employee performance.
- Helps align employee goals with organizational objectives.
- Supports both managers and employees in monitoring progress.

Core Features in Dynamics 365

- Goal Setting and Tracking
- Performance Reviews and Evaluations
- Competency Assessments
- Rating Scales and Weighting

And in Microsoft Dynamics 365 appear as : (same color)



Performance Cycles

- Define the timeline for evaluations (monthly, quarterly, yearly).
- Includes stages like goal creation, and final evaluation.
- Ensures structured and repeatable performance processes.

Some Of Cycles Steps

- تم إضافة المدة باسم Q4-2025 ثم نقوم بإدخال تاريخ البداية والنهاية للفترة الزمنية المحددة للتقييم (مثال: 2025/10/01 إلى 2025/12/31)

← Save + New Delete Options 🔍

Performance period

Standard view ▾

🔍 Filter

↻	Performance period	↑	Start date	End date
	Q4-2025		01/10/2025 📅	31/12/2025 📅

نحدد مستويات الأداء (A, B, C...) ونطابقها المئوي، ونفعل الخيار الخاص بالقطاع الحكومي إذا لزم الأمر. (الصور التالية قبل وبعد اضافتهم) وبعد ذلك نيل خيار Default For Gov Per.

The factor must be a unique number 0 - 9 in sequence belonging to the rating model

Standard view

Rating models

Rating: Q4-2025 Description: Performance Management Team Default for gov performance: ☐ No

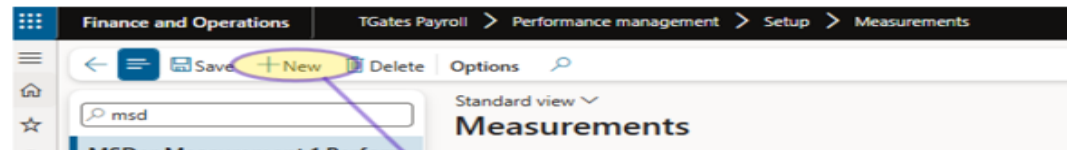
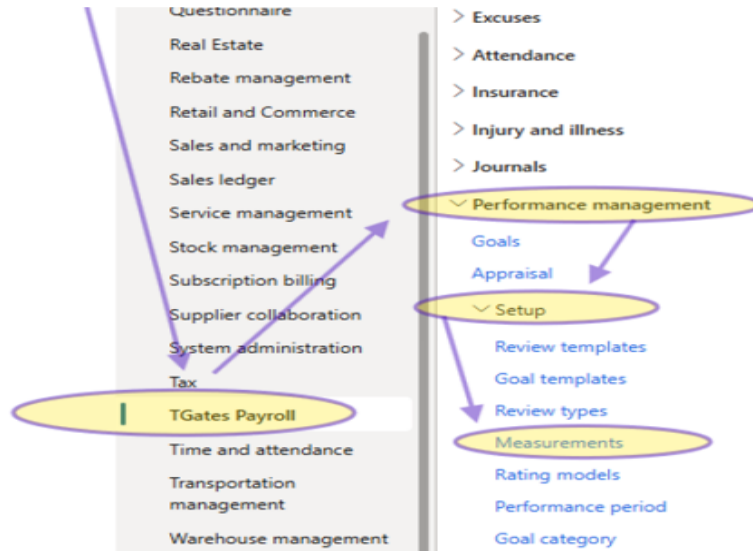
Levels

+ New - Delete

Level	Description	Factor ↑	Percent from	Percent to
E	Bad Performance	4	40.00	49.99
F	Hard Action	5	0.00	39.99
A	Excellent Performance	0	90.00	100.00
B	Very Good Performance	1	75.00	89.99
C	Good Performance	2	65.00	74.99
D	Need to Improve	3	50.00	64.99

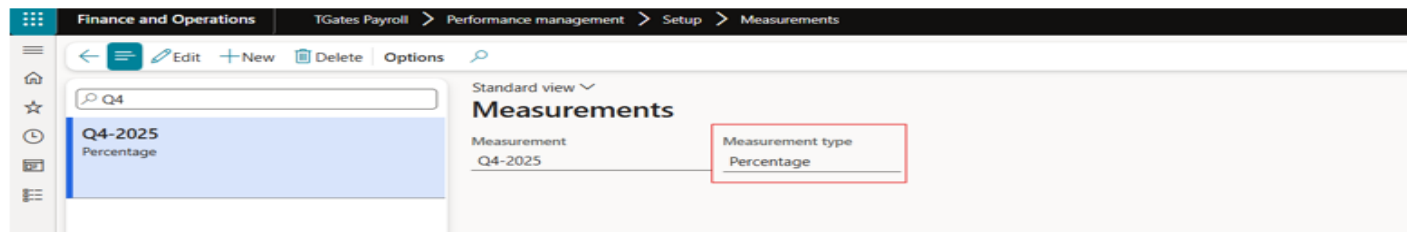
Notes

ننتقل إلى "Measurements" (المقاييس) لتعريف مقياس جديد يحدد طريقة قياس الأهداف من New



8- تحديد نوع المقياس:

نحدد نوع المقياس المستخدم، مثل "Percentage" (نسبة مئوية)، لكي يتم احتساب الإنجازات بناء عليه



ندخل نسبة الإنجاز الفعلي للمقاييس، ثم نراجع التصنيف النهائي (Rating) ونستكمل الموافقات والتوقيعات النهائية (Sign Offs)

Finance and Operations | TGates Payroll > Performance management > Appraisal

USMF

Appraisal | Standard view

Review types- Q4

Review Measurements (3) Activities (0) Ratings Sign offs (2) Attachments General

Not started

Rating

Final employee rating	Total goals score	Total score	Average score
Excellent Performance	95.40	0.00	0.00

Comment

Finance and Operations | TGates Payroll > Performance management > Appraisal

USMF

Appraisal | Standard view

Review types- Q4

Review Measurements (3) Activities (0) Ratings Sign offs (2) Attachments General

Not started

Sign Offs

+ Add user to sign off list ✓ Sign off ✓ Reverse sign off

Worker	Required	Sign off date
Basma AlaaEldin Rashwan	<input checked="" type="checkbox"/>	29/11/2025 18:00:00

Finance and Operations | TGates Payroll > Performance management > Appraisal

USMF

Appraisal | Standard view

Review types- Q4

Review Measurements (3) Activities (0) Ratings Sign offs (2) Attachments General

Not started

General

Review type	Performance period	Status
Q4-2025	Q4-2025	Not started
Description	Start date	Rating
Review types- Q4	01/10/2025	Performance Management ...
Worker	End date	
Basma AlaaEldin Rashwan	31/12/2025	

Overview

B I U S <

In general Using Performance Journals

- Employees can record achievements and progress.
- Managers can add feedback throughout the cycle.
- Improves transparency and fairness in evaluations.

Benefits of D365 Performance Management

- Improves employee engagement and accountability.
- Supports data-driven decision-making for managers.
- Enhances long-term development and career planning.
- Boosts overall organizational performance.

Conclusion

Performance Management in Microsoft Dynamics 365 provides a structured, data-driven approach for evaluating employee performance, aligning goals, and supporting continuous development. By leveraging tools like goals, reviews, and journals, organizations can enhance productivity and build a culture of improvement.

Thank You