

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)

The screenshot shows the Microsoft Dynamics 365 Finance and Operations navigation menu. The main title is "Finance and Operations". On the left, there's a sidebar with various menu items: Product information management, Production control, Project management and accounting, Purchase ledger, Questionnaire, Real Estate, Rebate management, Retail and Commerce, Sales and marketing, Sales ledger, Service management, Stock management, Subscription billing, Supplier collaboration, System administration, Tax, and TGates Payroll (which is circled in red). The main content area has two columns. The left column includes "Expand all" and "Collapse ..." buttons. The right column lists several categories: Workspaces, Work process, Workers, Salary, Transactions, Loans, Periodic, Inquiries and reports, Bonus and Incentives, Penalties, Leaves, Missions, Excuses, Attendance (with sub-items Attendance processing and Attendance Log), Injury and illness, Journals, Performance management (which is expanded and highlighted with an orange border), Setup (which is also highlighted with a green border), Review templates, Goal templates, Review types, Measurements, Rating models, Performance period, Goal category, Periods, Employer contribution, Benefit management, and Taxes.

- ☰
- TGates Payroll
- Finance and Operations**
- Expand all Collapse ...
- > Workspaces
- > Work process
- > Workers
- > Salary
- > Transactions
- > Loans
- > Periodic
- > Inquiries and reports
- > Bonus and Incentives
- > Penalties
- > Leaves
- > Missions
- > Excuses
- ✓ Attendance
 - Attendance processing
 - Attendance Log
- > Injury and illness
- > Journals
- ✓ Performance management
 - Goals**
 - Appraisal**
 - ✓ Setup
 - Review templates
 - Goal templates
 - Review types
 - Measurements
 - Rating models
 - Performance period
 - Goal category
 - > Periods
 - > Employer contribution
 - > Benefit management
 - > Taxes

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 للتقدير (مثال: 2025/10/01 إلى 2025/12/31)

The screenshot shows a software interface for managing performance periods. At the top, there is a toolbar with icons for Back, Save, New, Delete, Options, and Search. Below the toolbar, the text "Performance period" is displayed. A dropdown menu labeled "Standard view" is open. A search bar with a magnifying glass icon and the placeholder "Filter" is present. A table lists a single performance period entry:

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

نحدد مستويات الأداء (A, B, C...) ونطاقها المئوي، ونفع الخيار الخاص بالقطاع الحكومي إذا لزم الأمر . (الصور التالية قبل وبعد إضافتهم) وبعدها تعديل خيار Default For Gov Per.

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

Save + New Delete Options

Standard view Rating models

Rating Description Default for gov performance

Q4-2025 Performance Management Team No

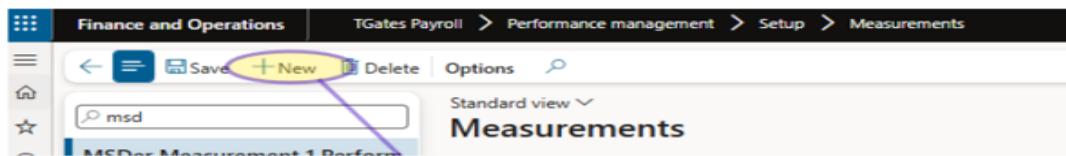
Levels

+ 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

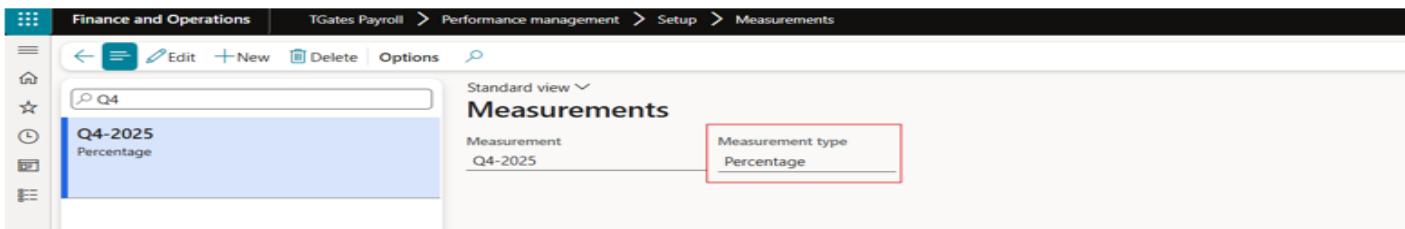
Notes

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



٨- تحديد نوع المقياس:

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



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

This screenshot shows the 'Appraisal | Standard view' interface. The top navigation bar includes 'Edit', '+ New review', 'Delete', 'New from template', 'Mass creation', 'Show sections', 'Print review', and 'Options'. The main content area displays 'Review types- Q4' for 'John Emory' (Q4-2025). Below this, there are tabs for 'Review', 'Measurements (3)', 'Activities (0)', 'Ratings' (underlined), 'Sign offs (2)', 'Attachments', and 'General'. A red arrow points to the 'Ratings' tab. Another red arrow points to the 'Total score' field, which shows '95.40' under 'Excellent Performance'. A third red arrow points to the 'Comment' section.

This screenshot shows the same appraisal interface, but the 'Sign offs' tab is now selected. A large green downward arrow is positioned between the 'Ratings' and 'Sign offs' tabs. The 'Sign offs' section contains fields for 'Worker' (Basma AlaaEldin Rashwan), 'Required', and 'Sign off date' (29/11/2025 18:00:00). A red arrow points to the 'Sign off' button.

This screenshot shows the 'General' tab selected. A large green downward arrow is positioned between the 'Sign offs' and 'General' tabs. The 'General' section includes fields for 'Review type' (Q4-2025), 'Performance period' (Q4-2025), 'Status' (Not started), 'Description' (Review types- Q4), 'Worker' (Basma AlaaEldin Rashwan), 'Start date' (01/10/2025), 'End date' (31/12/2025), and 'Rating' (Performance Management ...). Below the general settings is an 'Overview' section with a rich text editor toolbar.

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