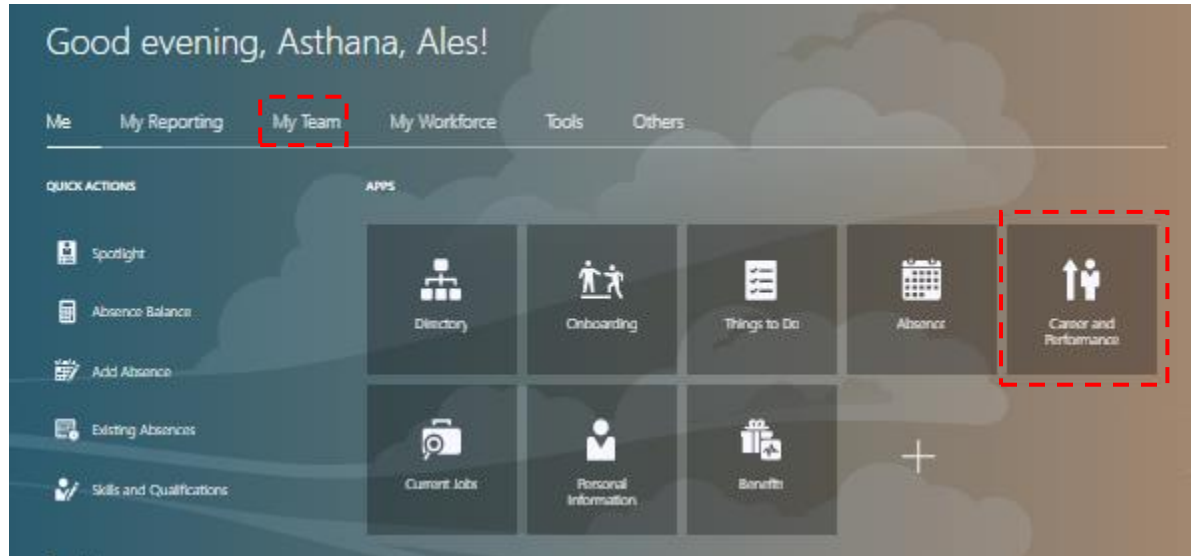


# ZinZai Connect

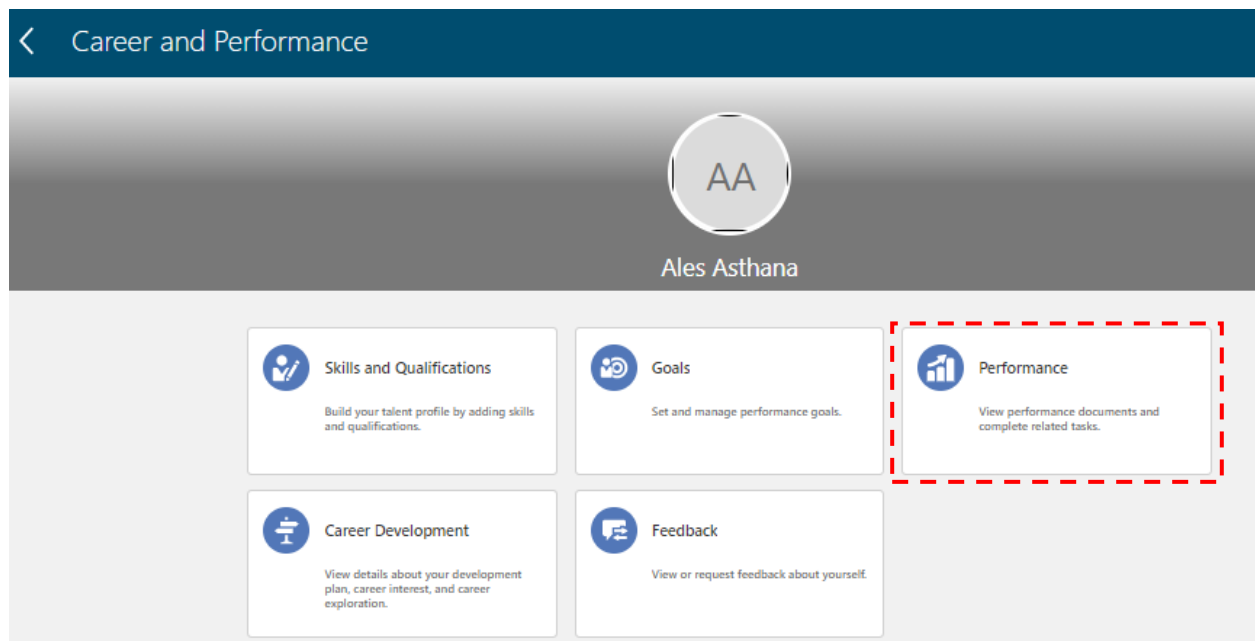
## Manager Guide : Connect Conversation

### Manager creates a Connect Conversation Document

**Step 1:** Select **My Team** > **Career and Performance**



**Step 2:** Click **Performance**



## ZinZai Connect

### Manager Guide : Connect Conversation

**Step 3:** Enter employee name in **Search Person** field then select the **Search icon**, Select the **Employee Name hyperlink**

**Note:** if access is for a **Performance Manager**, Select **Show Filters**, In the **Manager Type filter**, select **Performance Manager**

Goals and Performance Overview

Review Period: FY2022 Annual Review

My Team

Search Person [Show Filters](#)

☐ Add Performance Goal Sort By: Name ascending

|   |                                    |
|---|------------------------------------|
| <input type="checkbox"/> <b>AnabelaBento Suzor-Nadeau</b><br>BCBC Senior Business Analyst | ***                                |
| Last Updated Performance Rating<br>Exceeds  | Performance Goals                  |
| Performance Documents   | Connect Conversations<br>0 created |
| Check-Ins<br>0 created  | Potential Rating                   |
| <input type="checkbox"/> <b>Aubrey Trevino</b><br>TSTS Technical Service Engineer         | ***                                |
| Last Updated Performance Rating   | Performance Goals                  |

**Step 4:** In the **Connect Conversations** section, select **Add**

Connect Conversations

## ZinZai Connect

### Manager Guide : Connect Conversation

**Step 5:** Select the **Performance Document Name** dropdown menu > select the **Connect Conversations Document** > Select the **Date of Review Meeting** > Enter **Description**, if applicable > Select the **Document Manager**, if applicable

**Note:** Only Connect Conversation for Q1 – Q4 will be available. Connect Conversation for Q4 (Connect Conversation\_Annual) will only be available during the last quarter of the fiscal year. This will include “Rating” field.

**Line Manager** is the **Document Manager** by default. **Performance Manager** needs to assign himself as the **Document Manager** to have access to the Connect Conversation tasks.

The screenshot shows the 'Connect Conversations' form. A red dashed box highlights the 'Performance Document Name' dropdown menu, which is open and showing options: 'FY2022 Connect Conversations\_Q1', 'FY2022 Connect Conversations\_Q2', and 'FY2022 Connect Conversations\_Q3'. Another red dashed box highlights the 'Date of Review Meeting' text input field, which contains 'm/d/yy'. Below these fields, the 'Document Manager' dropdown menu is set to 'Ales Asthana'. At the bottom, there is a 'Current Task' section with 'Manager Comments' and a 'Task Completion' progress bar at 1/3. 'Save' and 'Cancel' buttons are in the top right corner.

**Step 6:** Select **Save**

This screenshot shows the 'Connect Conversations' form after the previous steps. The 'Performance Document Name' dropdown is now set to 'FY2022 Connect Conversations\_Q1'. The 'Date of Review Meeting' field now contains '5/11/22'. The 'Description' field is empty. The 'Document Manager' dropdown remains set to 'Ales Asthana'. A red dashed box highlights the 'Save' button in the top right corner. The 'Current Task' section and 'Task Completion' progress bar are still visible at the bottom.

# ZinZai Connect

## Manager Guide : Connect Conversation

### Manager submits comments

**Step 7:** In the **Connect Conversations** section, select the **Connect Conversation Document name** hyperlink

**Note:** if the employee is on long leave, the manager can bypass the document to be able to proceed in adding comments to the Connect Conversation document: In the **Connect Conversations** section, select the **Action Ellipsis (...)** next to the Connect Conversation Document then select **“Bypass Self-Evaluation”**

**Step 8:** Select **Comments** next to **Connect Conversation Questionnaire**



# ZinZai Connect

## Manager Guide : Connect Conversation

**Step 11:** Expand the **Attachments** section, then **Add attachments**, if applicable

**Note:** When adding an attachment, select **Save** to save the added attachment. If any attachment exists, **Edit** button instead of Add button is displayed but this will still allow you to add more attachments if applicable.

The screenshot shows the 'Manager Comments: FY2022 Connect Conversations\_Q1' interface for Aubrey Trevino. The top navigation bar includes a back arrow, a user profile icon with 'AT', and 'Print' and 'Submit' buttons. Below the header, there is a light blue instruction box: 'Review and evaluate the contents of each section of the evaluation. Click submit when you're done.' The main content area has three sections: 'Document Details' (collapsed), 'Comments' (expanded, showing 'Connect Conversation Questionnaire' and '4 of 4 commented' with a 'Comments' button), and 'Attachments' (highlighted with a red dashed box, showing a '+ Add' button and an upward arrow). Below the 'Attachments' section, there is a small icon of a bowl and the text 'There's nothing here so far.'

**Step 12:** Select **Submit**

This screenshot is identical to the previous one, but the 'Submit' button in the top right corner is now highlighted with a red dashed box. Additionally, a small circular help icon with an 'i' and a grid of dots is visible on the right side of the interface.

# ZinZai Connect

## Manager Guide : Connect Conversation

### Connect Conversations

☐

☐ **FY2022 Connect Conversations\_Q1** By Ales Asthana \*\*\*

**Current Task**  
Share Connect Conversation

**Task Completion**  
 2 / 3

**All Tasks**

- ✓ Employee Comments
- ✓ Manager Comments
- Share Connect Conversation

### Manager shares Connect Conversation document to employee

**Step 13:** Go to **My Team > Career and Performance**

**Note:** if access is for a **Performance Manager**, Select **Show Filters**, In the **Manager Type filter**, select **Performance Manager**

**Step 14:** Enter employee name in **Search Person** field then select the **Search icon** > Select the **Employee Name hyperlink** > In the **Connect Conversations** section, select the **Connect Conversation Document name hyperlink**

### Connect Conversations

☐

☐ **FY2022 Connect Conversations\_Q1** By Ales Asthana \*\*\*

**Current Task**  
Share Connect Conversation

**Task Completion**  
 2 / 3


**All Tasks**

- ✓ Employee Comments
- ✓ Manager Comments
- Share Connect Conversation

**Step 15:** Select **Share and Release**

AT

Share Connect Conversation: FY2022 Connect Conversations\_Q1  
Aubrey Trevino

**Information**  
Share the evaluation for employee review. Retain control or release to progress to the next task.

**Document Details** ▼

**Comments** ^

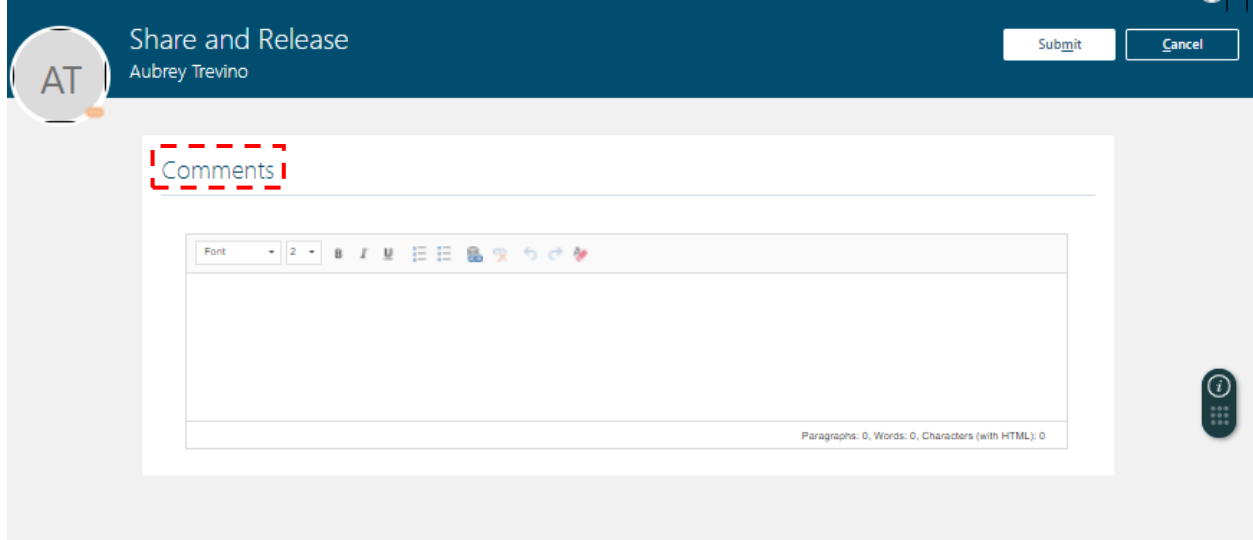
[Connect Conversation Questionnaire](#)  
4 of 4 commented

**Attachments** ▼

# ZinZai Connect

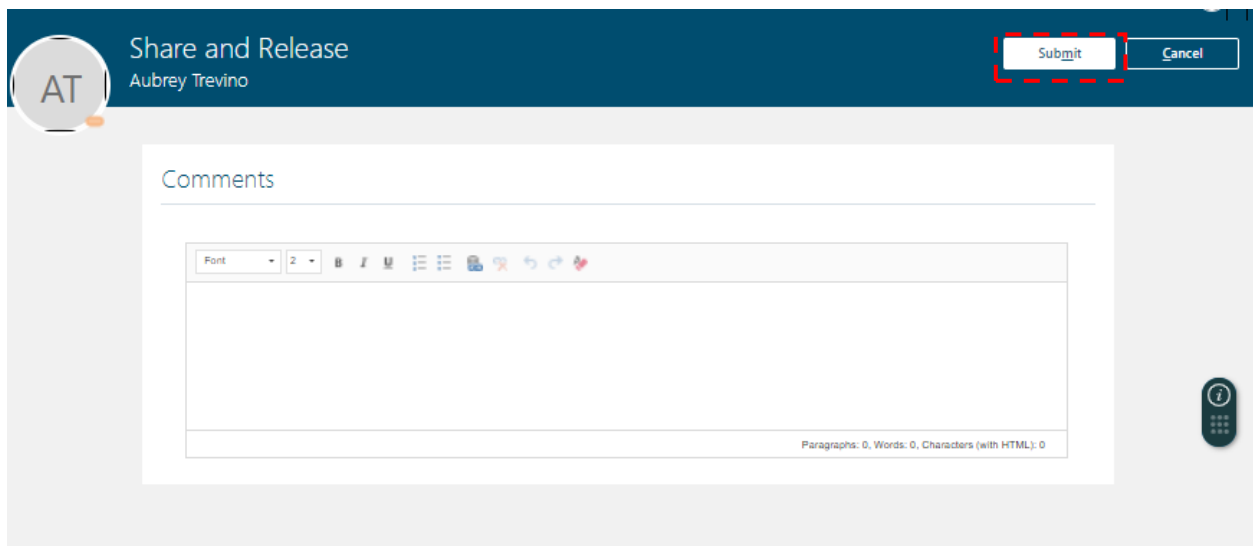
## Manager Guide : Connect Conversation

**Step 16:** Enter **Comments**, if applicable



The screenshot shows the 'Share and Release' dialog box for user 'Aubrey Trevino'. The 'Comments' field is highlighted with a red dashed border. The field contains a text editor with a toolbar and a status bar at the bottom indicating 'Paragraphs: 0, Words: 0, Characters (with HTML): 0'. The 'Submit' and 'Cancel' buttons are visible in the top right corner.

**Step 17:** Select **Submit**



The screenshot shows the 'Share and Release' dialog box for user 'Aubrey Trevino'. The 'Submit' button is highlighted with a red dashed border. The 'Comments' field is visible below the header, and the 'Cancel' button is to the right of the 'Submit' button.