

# Performance Management Reports

## Overview

This instructional guide identifies the steps for processing performance management reports in Performance & Talent Management within People First. Report templates are available for both the performance expectations setting and evaluation processes.

## Definitions

*The following are the definitions relevant to this instructional guide:*

- My Dashboard (Dashboard) – home page for Performance & Talent Management.
- Performance & Talent Management – navigation tab from the People First home page where performance expectations are set, performance evaluations are conducted and performance evaluations that were completed in People first (July 1, 2013, forward) are stored.
- Performance Expectations Reports – standard expectations reports that can be used as a template to create customized performance expectations reports.
- Performance Evaluations Reports – standard evaluations reports that can be used as a template to create customized performance evaluation reports.
- Primary Navigation Menu – double arrow button within Performance & Talent Management (on Dashboard) that allows direct access to performance management reports.
- Report Grid – table that displays the data fields (report columns) and data for a selected report. The following are the options available within the report grid:
  - Advanced Filter – allows the user to create complex filter criteria using groups of filters.
  - Clear Filter – removes filters (dropdown or text) that have been applied to the report grid.
  - Hide Filters – hides report filters (dropdown or text) for a selected report.
  - Reports – allows the user to export the report data to Excel or CSV (comma separated values) format.
  - Run Filter – applies filters (dropdown or text) that have been selected so that only certain data is displayed. Filtering does not permanently remove records it just temporary hides them from view.
  - Save View – allows the user to save a customized report (view) for future use. Customized reports (views) are only available to the report creator.
  - Select View – lists all the report templates available, based on the type of report (Performance Expectations or Performance Evaluations) selected from the Primary Navigation Menu.
  - Set Columns – displays all data fields that are available to be imported to the report grid. This function allows the user to add or remove data fields (report columns).

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- Show Filters – displays report filters (dropdown or text) that can be used to set conditions so that only certain data is displayed.

## Performance Expectations Reports

*The following are the performance expectations reports that are available within Performance & Talent Management:*

- **Expectations Detailed Listing by Employee** – identifies all performance expectations for each employee (employee in “Performance Expectations Setting Completed” step).
- **Performance Expectations Status** – identifies which step (i.e., Set Performance Expectations, Employee Acknowledgement, Performance Expectations Setting - Completed) the employee is within the performance expectation process.
- **Expectations Pending the Manager** – identifies employees whose performance expectations have not been set by the manager (employee in “Set Performance Expectations” step).
- **Expectations Pending Employee Acknowledgement** – identifies employees whose performance expectations have not been acknowledged (employee in “Employee Acknowledgement” step).
- **Expectations Acknowledgement Completed by Manager** – identifies employees whose performance expectations were acknowledged by the manager (employee in “Performance Expectations Setting Completed” step).
- **Expectations Acknowledgement Completed by Employee** – identifies employees who acknowledged their own performance expectations (employee in “Performance Expectations Setting Completed” step).

## Performance Evaluations Reports

*The following are the performance evaluation reports that are available within Performance & Talent Management:*

- **Performance Evaluation Status** – identifies which step (i.e., Performance Evaluation, Second-Level Review, Ready for Employee Acknowledgement, Employee Acknowledgement, or Performance Evaluation Completed) the employee is within the performance evaluation process.
- **Evaluation Acknowledgement Completed by Manager** – identifies employees whose performance evaluation was acknowledged by the manager (employee in “Performance Evaluation Completed” step).
- **Evaluation Acknowledgement Completed by Employee** – identifies employees who acknowledged their own performance evaluation (employee in “Performance Evaluation Completed” step).
- **Evaluations with Overall Rating Below Satisfactory** – identifies employees whose overall rating is below 3.0 (employee in “Performance Evaluation Completed” step).
- **Evaluations with Overall Rating of Outstanding** – identifies employees whose overall rating is 4.50 or above (employee in “Performance Evaluation Completed” step).

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- **Administratively Closed Evaluations** – identifies employees whose performance evaluation was closed (i.e., manager or employee did not complete the process) by the service center (employee in “Performance Evaluation Completed” step).
- **Rating of None Given Selected for all Expectations** – identifies employees who were rated as “N – None Given” on all performance expectations (employee in “Performance Evaluation Completed” step).

## Authorization

Human Resource (HR) staff with a security role of A, H, U, X and Y can process performance management reports statewide. Managers can process reports for employees that report directly to them, as well as employees within their reporting structure.

## Process Steps

Reports are located in the primary navigation menu on the Dashboard within Performance & Talent Management. Follow the steps below to run a performance management report:

**Step 1: Select the “Performance & Talent Management” tab on the People First Home Page**



**Step 2: Select the primary navigation menu from the Dashboard**



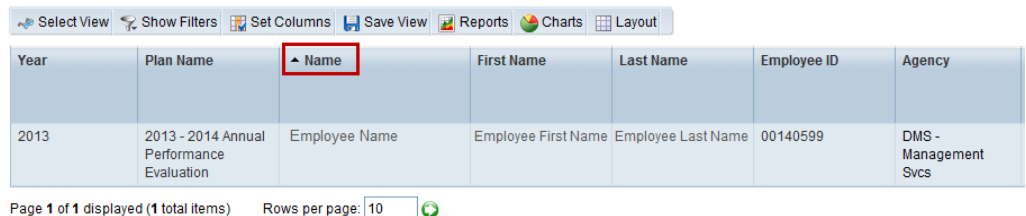
**Step 3: Select either Performance Expectations Reports or Performance Evaluations Reports from the primary navigation menu**



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## Step 4: Select a specific report to run from the Performance Expectations Reports or Performance Evaluations Reports dropdown menu

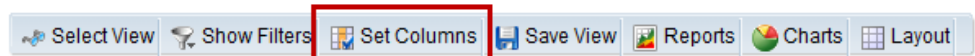
- The report grid is presented with data based on the report template selected.
  - Note: The data in the report grid can be sorted by clicking on the column headings. Click once to sort in ascending order and click again to sort in descending order. An up or down arrow icon will be displayed next to the column heading to identify how the data is sorted.



Year	Plan Name	Name	First Name	Last Name	Employee ID	Agency
2013	2013 - 2014 Annual Performance Evaluation	Employee Name	Employee First Name	Employee Last Name	00140599	DMS - Management Svcs

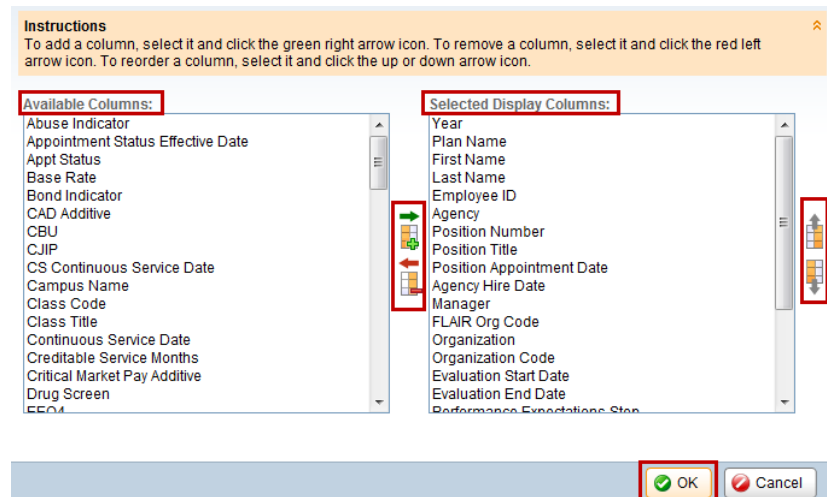
Page 1 of 1 displayed (1 total items) Rows per page: 10

## Step 5: Select “Set Columns” in the report grid to add, remove and sort data fields (report columns).



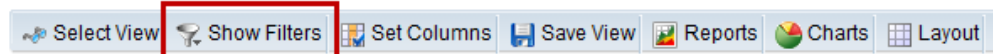
## Step 6: Add, remove and sort data fields (report columns).

- Add Field – highlight the appropriate field from the “Available Columns” section; select the green right facing arrow to move the fields to the “Selected Display Columns.”
- Remove Field – highlight the appropriate field(s) from the “Selected Display Columns” section; select the red left facing arrow to move the fields to the “Available Columns.”
- Sort Order – highlight the appropriate field from the “Selected Display Columns” section and select the up or down arrow to reorder the report columns.
- Select “OK” to apply the changes.



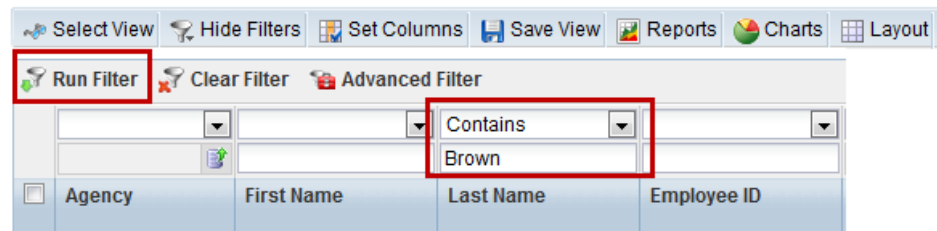
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**Step 7: Select “Show Filters” to display report filters (dropdown or text) for each data field (report columns).**

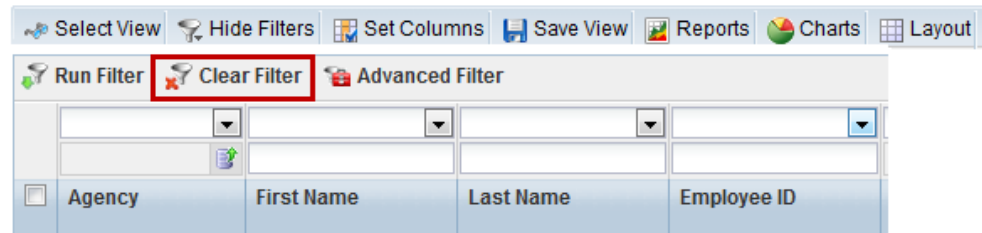


**Step 8: Apply appropriate filters to report grid.**

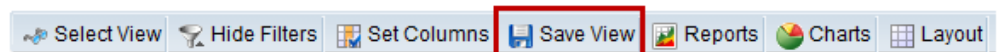
- Select the appropriate filter type (e.g., starts with, contains, equals to) from the dropdown under each column heading.
- Enter the information to be filtered (some filters contain data that must be selected or dates to select from).
  - Note: The data for HR staff is defaulted to statewide; in order to view data for own agency, apply the filter by agency.
- Select “Run Filter” to apply filters that have been selected.



- Select “Clear Filter” to remove filters that have been applied to the report grid that are no longer needed.
  - Note: This step should not be completed if the report will be saved as a custom view.



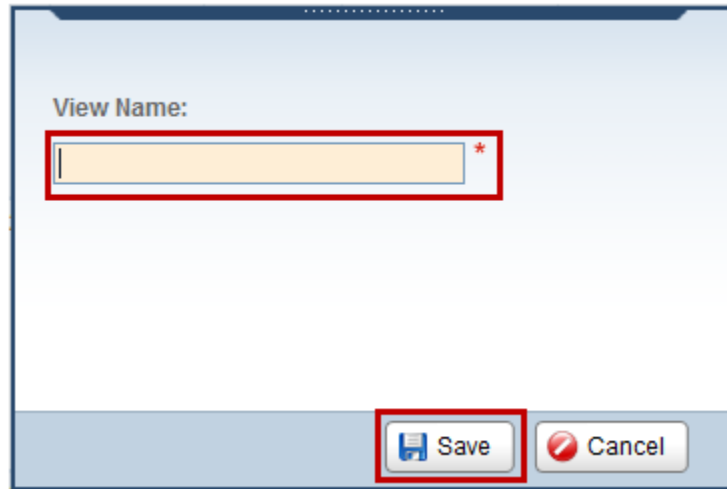
**Step 9: Select “Save View” to create a custom report (view) for future use.**



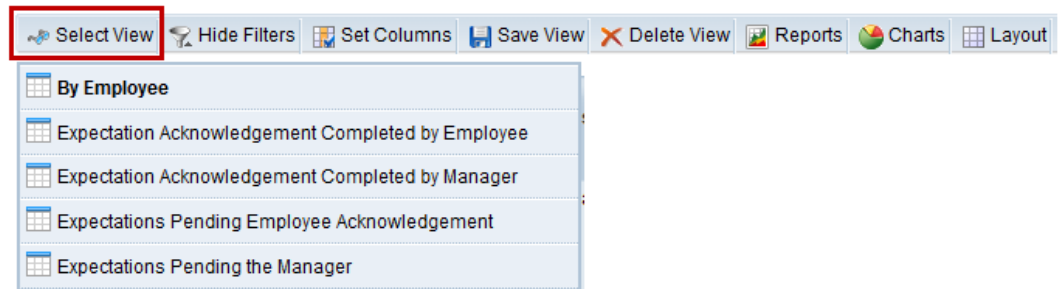
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## Step 10: Save the custom report (view).

- Enter the custom report (view) name in the “View Name” field.
- Select “Save” to create the custom report (view).

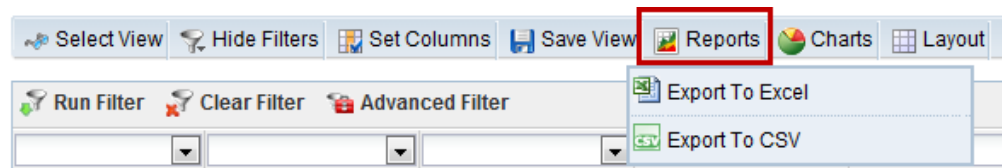


- Once saved, the custom report (view) will show in the reports listing within the Primary Navigation menu as well as the Select View within the report grid.



## Step 11: Export data from report grid.

- Select “Reports”, then choose the format (Excel or CSV) to export data.



- Select “Export” to download the report.
  - Reports with less than 500 rows will open instantly.
  - If the report contains more than 500 records, select the “Export All Rows of Data (More Than 500 Rows)” checkbox.
    - The report will be emailed to the user’s work email address in People First.

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- If the checkbox is not selected, only the first 500 rows of data will be exported.

