Performance Management Reporting Manual

myPURPOSE

Table of Contents

Standard Reports

Bulk Performance Reviews Report

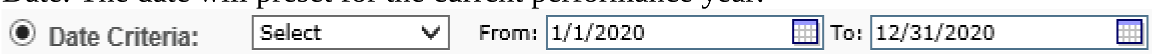
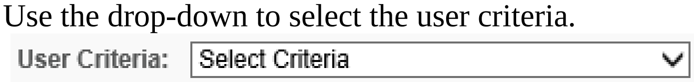
The Bulk Performance Reviews Report enables you to download all performance reviews based on date range and/or a performance review task. Report results will export to a zip file, which will contain a separate PDF for each employee/review. A maximum of 500 performance review PDFs can be generated at one time.

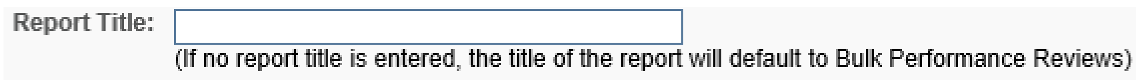
This report may be used for auditing information, such as goal percentages and interim review comments.

To access the Bulk Performance Reviews Report, go to:

REPORTS > STANDARD REPORTS > PERFORMANCE > BULK PERFORMANCE REVIEWS.

Report Criteria:

FILTER	DESCRIPTION
Review	Date: The date will preset for the current performance year.  Select the date range from the Date Criteria drop-down or enter a custom date range using the **From** and **To** fields. Task: Select this option to filter the report results by performance review task.  Select the icon to choose a performance review task.
User Criteria	Use the drop-down to select the user criteria.  You may choose one or more individual employees as well as entire Organization.
Advanced	The following options are available if the Date Criteria option is selected in the Review Filters section: • **Performance reviews for which the completion date is equal to or contained within the date filters.** The date criteria filter is based employee's task completion date. For example, if the employee's performance review task was completed on March 2, 2019, the employee is selected in the user criteria, and the date criterion is set to January 1, 2019 to June 1, 2019, then the employee's performance review is included in the report. • **Performance reviews for which the report date criteria overlaps the performance review period.** The date criteria filter is based on the task performance review period. For example, if the "2019 Performance Review" has a performance review task period from January 1, 2019 to December 31, 2019, and the date criterion is set to January 1, 2019 to June 1, 2019, then the "2019 Performance Review" task is included.

FILTER	DESCRIPTION
	The following options are available if the Task option is selected in the Review Filters section: • **Only completed performance reviews.** Performance reviews that are in a Completed status are included in the report. • **All completed or in progress performance reviews.** Performance reviews in a Completed or In Progress status are included in the report. Print Preferences: Choose Employee View or Manager View, however there is no difference in these reports.
Process Report	Enter a title for the report, up to 50 characters.  Report title defaults to "Bulk Performance Reviews" if no title is entered. The title is displayed on the report and in the list of Processed Reports on this page. Select Process Report  When administrators process this report, the system generates the report in the background, while the administrator can move on to other areas of the system.
Output	When the report is finished processing, the administrator can then view the full report in its entirety. The report output is stored in the Processed Reports table. You can choose the following actions and options for each report in the Processed Report table: • Click the Zip File icon to download a .zip file. • Click the Refresh icon to refresh the report results. • Click the View Details icon to view the filter criteria for the report. • Click the Delete icon to delete the report.

Goal Details Report

The Goal Details Report displays goals assigned to an employee within a specific time period.

This report can be used to view all goals that have been created for an employee.

To access the Goal Details Report, go to REPORTS > STANDARD REPORTS > PERFORMANCE > GOAL DETAILS.

Report Criteria:

FILTER NAME	DESCRIPTION
Date	The date will preset for the current performance year.  Select the date range from the Date Criteria drop-down or enter a custom date range using the **From** an **To** fields.
User Criteria	Use the drop-down to select the user criteria.  You may choose one or more individual employees as well as entire Organization.
Advanced	Choose one of the following options. • Include cancelled goals in the report. • Include goal comments in the report. (This is the default setting.) • Display each goal on a separate page in the PDF version.
Output	Choose one of the following 

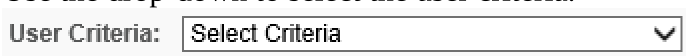
Goal Status Report

The Goal Status Report summarizes the status of all goals for employees during a specific time period.

Note: *When reporting on an employee's goals, only submitted goals are displayed.*

To access the Goal Status Report, go to REPORTS > STANDARD REPORTS > PERFORMANCE > GOAL STATUS.

Report Criteria:

FILTER NAME	DESCRIPTION
Date	The date will preset for the current performance year.  Select the date range from the Date Criteria drop-down or enter a custom date range using the **From** an **To** fields.
User Criteria	Use the drop-down to select the user criteria.  You may choose one or more individual employees as well as entire Organization.
Advanced	• Goal Type: All (This is the default setting.) • Display OU: Select an Organizational Unit to display that information on the report. For example, if you select the Position OU, each user's position will display in the report. This is optional.
View	Select View Report. 
Output	Results will display a pie chart representing the number of goals in each status. Status can be determined by approved, completed, and denied. **Note:** *When reporting on an employee only submitted goals are displayed.* Export options for each view, Printable Version and Export to Excel. If there are more than 25 results, you can navigate between the pages using the navigation option on the right.

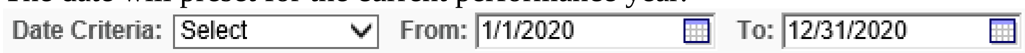
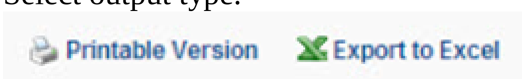
.

Goal Task Summary Report

The Goal Tasks Summary Report summarizes all goal tasks for employees during a specific time period.

To access the Goal Status Report, go to REPORTS > STANDARD REPORTS > PERFORMANCE > GOAL TASKS SUMMARY.

Report Criteria:

FILTER NAME	DESCRIPTION
Date	The date will preset for the current performance year.  Select the date range from the Date Criteria drop-down or enter a custom date range using the **From** and **To** fields.
User Criteria	Use the drop-down to select the user criteria.  You may choose one or more individual employees as well as entire Organization.
Advanced	• Goal Type: All (This is the default setting.)
Output	Select output type. 

Goal Exception Report

The Goal Exception Report displays all employees who do not have an active approved goal within a specific time period.

***Note**: Goals that are in draft status are not considered active goals.*

To access the Goal Status Report, go to REPORTS > STANDARD REPORTS > PERFORMANCE > GOAL EXCEPTION.

Report Criteria:

FILTER NAME	DESCRIPTION
Date	The date will preset for the current performance year. Date Criteria: Select From: 1/1/2020 To: 12/31/2020 Select the date range from the Date Criteria drop-down or enter a custom date range using the **From** an **To** fields.
User Criteria	Use the drop-down to select the user criteria. User Criteria: Select Criteria You may choose one or more individual employees as well as entire Organization.
Advanced	• Display OU: Choose Organization • Pending Goals: Employees with goals pending approval (but no other active goals) will not display if this option is selected. • Shared Goals: Employees with shared goals (but no independent goals) will not display if this option is selected. ***Note**: We are not utilizing shared goals.*
Output	Select output type. Printable Version Export to Excel

Performance Review Report

The Performance Review Report displays a performance review for an employee. This report can be run for both active and inactive employees.

You may use this report for auditing an employee's performance view regarding comments, goals, etc.

To access the Performance Review Report, go to REPORTS > STANDARD REPORTS > PERFORMANCE > PERFORMANCE REVIEW.

Report Criteria:

FILTER NAME	DESCRIPTION
Employee Reviewed	Select the employee whose review you are viewing. Employee Reviewed: Select Employee
Performance Review Task	Select the review task to display for the selected employee. (annual plan, mid-year interim, or year-end interim review/final evaluation) Performance Review Task: Select Task
Output	Print Performance Review

Performance Review Details Report

The Performance Review Details Report allows you to report on multiple performance reviews within a given time range, all in a single PDF.

This will show you where a task step is sitting in workflow and can be used to audit compliance.

To access the Performance Review Details Report, go to REPORTS > STANDARD REPORTS > PERFORMANCE > PERFORMANCE REVIEW DETAILS REPORT.

Report Criteria:

FILTER NAME	DESCRIPTION
Date	The date will preset for the current performance year. Date Criteria: Select From: 1/1/2020 To: 12/31/2020 Select the date range from the Date Criteria drop-down or enter a custom date range using the **From** an **To** fields.

FILTER NAME	DESCRIPTION
User Criteria	Select one of the following: • **Include review data for inactive users**- When this option is selected, inactive users are included in the report output. • **Include review data for applicants, if available**- When this option is selected, any historical review data for applicants is included in the report output. **User Criteria**: Use the drop-down to select the user criteria. User Criteria: Select Criteria You may choose one or more individual employees as well as entire Organization.
Advanced	Select from the following options to determine which performance review you would like to print: ○ **Complete date is equal to or within the date filters** - This option is selected by default. When selected, the report output displays all standard and off-cycle reviews that were completed during the defined date range. ○ **Report date criteria overlaps the performance review period** - When this option is selected, the report output displays all standard and off-cycle reviews where the review period overlaps the defined date criteria.
Process Report	Enter a title for the report. Report Title: The character limit is 50. If a title is not entered, the report title defaults to Performance Review Details Report. When the **Process Report** link is selected, the report is run based on the selected criteria. The report output is stored in the Processed Reports table.

Output	The Processed Reports table displays the following for the report:
	○ Report Name
	○ Last Run
	○ Output - Click the PDF icon to open the report.
	○ Options –The following options are available in the Options column:
	    ○ Refresh - Click to refresh the report data.
	    ○ View Details - Click to view the report configuration details.

Performance Review Step Status Report

The Performance Review Step Status Report displays the status of review steps within a performance review task.

This report can be used to audit compliance.

To access the Performance Review Step Status Report, go to REPORTS > STANDARD REPORTS > PERFORMANCE > PERFORMANCE REVIEW STEP STATUS REPORT.

Report Criteria:

FILTER NAME	DESCRIPTION
User Criteria	This report only runs within the defined permissions for the administrator running the report. If no criteria is selected, the report is run for all available users. User Criteria: Select Criteria
Advanced	• Select a specific performance review task. Performance Review Task: • Once a Review Task is selected, the steps within the review task are displayed. The report displays the status of each selected step for the selected employees. Review Steps: ☑ Evaluator Review ☑ Self Review ☑ Evaluator Goal Review Confirmation ☑ Next Line Supervisor Review ☑ Evaluator Discussion and Acknowledgment ☑ Employee Acknowledgment • Display OU: Select Organization
Output	Select output type. Printable Version Export to Excel

Task User Status Report

This report displays the status of one or more tasks for any organizational unit. The report will generate an overall percentage for each status, Not Started, In Progress, or Complete, across multiple tasks.

This report may also be used to audit compliance.

Report Criteria:

FILTER NAME	DESCRIPTION
User Criteria	Select organization. User Criteria: Select Criteria
Advanced	• Task (required field) - filter on specific task/s Task: Selected Tasks • Task Completion Date - check to Include Task Completion Date Task Completion Date: ☐ Include Task Completion Date • Sort By - choose to sort by User or Task Sort By: ◉ User ○ Task
Output	Select output type. Printable Version Export to Excel Export to Text

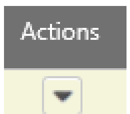
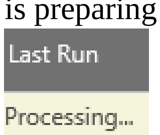
CUSTOM REPORTS

Decline to Sign Report

The Decline to Sign Report enables you to view, save or print a report of employees who have declined to sign an annual performance plan, mid-year interim review year-end interim review/final evaluation.

To access the Decline to Sign Report, go to REPORTS > CUSTOM REPORTS > DECLINE TO SIGN.

Report Instructions:

STEPS	DESCRIPTION
Title	• Select the Declined to Sign report under the Title heading.  • Select the drop down arrow under the Actions heading. 
Actions	• Select Refresh.  • You will notice that under the Last Run heading it will show the date of the last time this report was run.  • Once you select refresh it will display that it is processing. This means that your report is preparing and will populate the current date when complete.  • When the report is report is ready you must then select to view in Excel, Text or Print versions. 

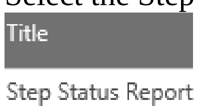
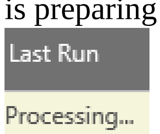
STEPS	DESCRIPTION
Output	You will also be able to save or print reports if needed. Excel documents can be filtered, edited, and shared with your agency

Step Status Report

The Step Status Report enables you to view, save or print a report of the status of review steps within a performance review task. This report details the same information of the standard Performance Review Step Status Report but includes the name of the Next Line Supervisor. This report would be good to use when auditing compliance.

To access the Step Status Report, go to REPORTS > CUSTOM REPORTS > STEP STATUS REPORT.

Report Instructions:

STEPS	DESCRIPTION
Title	• Select the Step Status Report under the Title heading.  • Select the drop down arrow under the Actions heading. 
Actions	• Select Refresh.  • You will notice that under the Last Run heading it will show the date of the last time this report was run.  • Once you select refresh it will display that it is processing. This means that your report is preparing and will populate the current date when complete.  • When the report is report is ready you must then select to view in Excel, Text or Print versions.

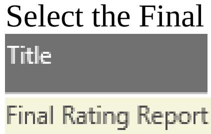
STEPS	DESCRIPTION
	
Output	• You will also be able to save or print reports if needed. Excel documents can be filtered, edited, and shared with your agency.

Final Rating Report

The custom Final Rating Report enables you to view, save or print a summary of final evaluation ratings for each employee within the OU (organizational unit).

To access the Final Rating Report, go to REPORTS > CUSTOM REPORTS > FINAL RATING REPORT.

Report Instructions:

STEPS	DESCRIPTION
Title	• Select the Final Rating Report under the Title heading.  • Select the drop down arrow under the Actions heading. 
Actions	• Select Refresh.  • You will notice that under the Last Run heading it will show the date of the last time this report was run.  • Once you select refresh it will display that it is processing. This means that your report is preparing and will populate the current date when complete.

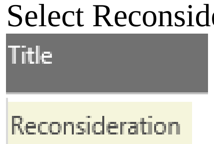
STEPS	DESCRIPTION
	 • When the report is report is ready you must then select to view in Excel, Text or Print versions. 
Output	• You will also be able to save or print reports if needed. Excel documents can be filtered, edited, and shared with your agency.

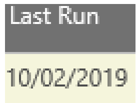
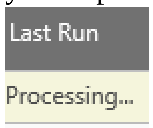
Reconsideration Requests Report

The Reconsideration Report enables you to view, save or print a summary of those employees that have requested reconsideration of the Final Evaluation within the OU (organizational unit).

To access the Reconsideration Report, go to REPORTS > CUSTOM REPORTS > RECONSIDERATION.

Report Instructions:

STEPS	DESCRIPTION
Tile	• Select Reconsideration under the Title heading.  • Select the drop down arrow under the Actions heading. 
Actions	• Select Refresh.  • You will notice that under the Last Run heading it will show the date of the last time this report was run.

STEPS	DESCRIPTION
	 • Once you select refresh it will display that it is processing. This means that your report is preparing and will populate the current date when complete.  • When the report is report is ready you must then select to view in Excel, Text or Print versions. 
Output	• You will also be able to save or print reports if needed. Excel documents can be filtered, edited, and shared with your agency.

<u>New Position Performance Planning Report</u>

The New Position Performance Planning Report enables administrators to view, save or print a summary of those employees that have had new position performance plans developed within the OU (organizational unit) during the performance year.

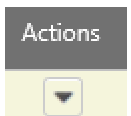
To access the New Position Performance Planning Report, go to REPORTS > CUSTOM REPORTS > NEW POSITION PERFORMANCE PLANNING.

Report Instructions:

<table>
<tr><th>STEPS</th><th>DESCRIPTION</th></tr>
<tr><td>Title</td><td>

- Select New Position Performance Planning under the Title heading.

- Select the drop down arrow under the Actions heading.

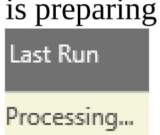


</td></tr>
<tr><td>Actions</td><td>

- Select Refresh.

- You will notice that under the Last Run heading it will show the date of the last time this report was run.

- Once you select refresh it will display that it is processing. This means that your report is preparing and will populate the current date when complete.



- When the report is report is ready you must then select to view in Excel, Text or Print versions.

</td></tr>
</table>

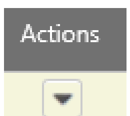
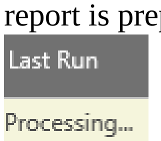
STEPS	DESCRIPTION
Output	• You will also be able to save or print reports if needed. Excel documents can be filtered, edited, and shared with your agency.

Performance Improvement Plan (PIP) Report

The Performance Improvement Plan (PIP) Report enables you to view, save or print a summary of those employees that have had performance improvement plans developed within the OU (organizational unit) during the performance year.

To access the Performance Improvement Plan Report, go to REPORTS > CUSTOM REPORTS > PIP.

Report Instructions:

STEPS	INSTRUCTIONS
Title	• Select New Position Performance Planning under the Title heading.  • Select the drop down arrow under the Actions heading. 
Actions	• Select Refresh.  • You will notice that under the Last Run heading it will show the date of the last time this report was run.  • Once you select refresh it will display that it is processing. This means that your report is preparing and will populate the current date when complete.  When the report is report is ready you must then select to view in Excel, Text or Print versions.

STEPS	INSTRUCTIONS
	
Output	• You will also be able to save or print reports if needed. Excel documents can be filtered, edited, and shared with your agency.

For more information regarding the employee performance evaluation process or if you have other questions regarding the evaluation process, refer to our website at

[Personnel Cabinet Performance Management website]