TEAM KENTUCKY
PERSONNEL CABINET

Performance Management Reporting Manual

MyPURPOSE | CONNECTINGPEOPLETOPURPOSE

Table of Contents

Standard Reports

Bulk Performance Reviews Report

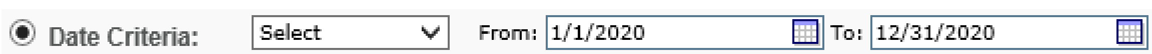
The Bulk Performance Reviews Report enables you to download all performance reviews based on date range and/or a performance review task. Report results will export to a zip file, which contains a separate PDF for each employee/review. A maximum of 500 performance review PDFs can be generated at one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

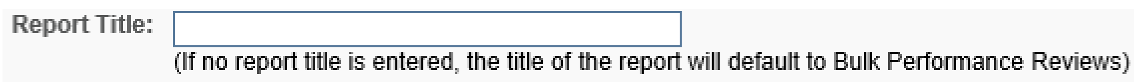
This report may be used for auditing information, such as goal percentages, acknowledgments, interim review comments, and ensuring goals and tasks follow the SMART criteria.

To access the Bulk Performance Reviews Report, go to:

REPORTS > STANDARD REPORTS > PERFORMANCE > BULK PERFORMANCE REVIEWS.

Report Criteria:

Filter	Description
Review	Choose to run the report by date or task, both options cannot be selected at the same time. **Date:** The date will auto populate to the current performance year.  You can change the date by selecting the date range from the 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 overlap the performance review period.** The date criteria filter is based on the task performance review period. For example, if

Filter	Description
	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. 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. Select Process Report  The system processes the report in the background to allow you to move on to other areas of the system while you wait.
Output	When the report is finished the report output is stored in the Processed Reports table. You have the following options for each report stored in the Processed Report table: Select the Zip File icon to download a .zip file to obtain a copy of the review. Select the Refresh icon to refresh the report results. Select the View Details icon to view the filter criteria for the report. Select the Delete icon to delete the report.

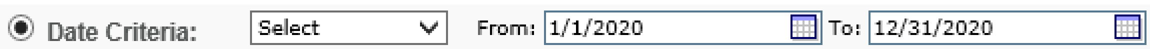
Goal Details Report

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

This report can be used to view all goals and tasks that have been created for an employee. You can audit goal percentage, ensure goals are consistent with the employee's position description and that task follow the SMART criteria.

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

Report Criteria:

Filter	Description
Date	The date will auto populate to the current performance year.  You can change the date by selecting the date range from the 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	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 

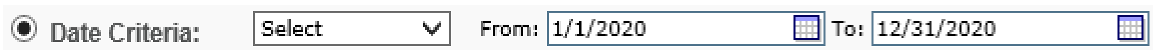
Goal Status Report

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

Note: When reporting on an employee's goal status, only submitted goals are displayed. Cancelled goals will not display.

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

Report Criteria:

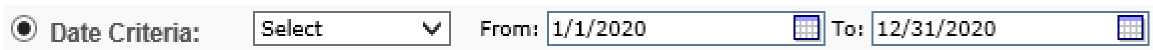
Filter	Description
Date	The date will auto populate to the current performance year.  You can change the date by selecting the date range from the drop-down or enter a custom date range using the **From** and **To** fields.
User Criteria	Use the drop-down to select the user criteria.  You may choose one or more individual employees as well as entire Organization.
Advanced	Goal Type: All (This is the default setting.) Display OU: This is optional, select Organizational Unit to view org information for each user on the report. OR select Position information to view position information for each user on the report.
View	Select View Report. 
Output	Results will display a pie chart representing the number of goals in each status; approved, completed, and denied. *Note: When reporting on an employee only submitted goals are displayed.* You have the option to print ore export the repost to Excel. 

Goal Task Summary Report

The Goal Tasks Summary Report summarizes all 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	Description
Date	The date will auto populate to the current performance year.  You can change the date by selecting the date range from the 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. 

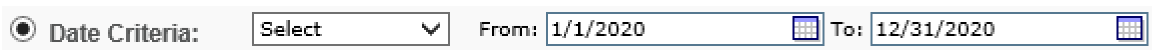
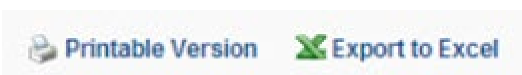
Goal Exception Report

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	Description
Date	The date will auto populate to the current performance year.  You can change the date by selecting the date range from the 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	Display OU: Choose Organization Choose Pending Goals: Employees with goals pending approval (but no other active goals) will not display. *Note: We are not utilizing shared goals.*
Output	Select output type. 

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.

This report may be used for auditing information, such as goal percentages, acknowledgments, interim review comments, and ensuring goals and tasks follow the SMART criteria.

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

Report Criteria:

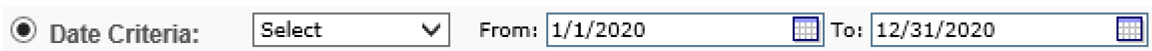
Filter	Description
Employee Reviewed	Select the employee whose review you are viewing. Employee Reviewed: Select Employee
Performance Review Task	Select the review task to display for the selected employee. (annual plan, mid-year interim, or year-end interim review/final evaluation) Performance Review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

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

Report Criteria:

Filter	Description
Date	The date will auto populate to the current performance year.  You can change the date by selecting the date range from the drop-down or enter a custom date range using the **From** and **To** fields.
User Criteria	You have the option to 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.  You may choose one or employees at a time.
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.  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	When the report output is stored in the Processed Reports table. You have the following options for each report stored in the Processed Report table:

Filter	Description
	Output - Select the PDF icon to open the report. Select the Refresh icon to refresh the report results. Select the View Details icon to view the filter criteria for the report. Select the Delete icon to delete the report.

Performance Review Step Status Report

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

This will provide you a list of all employees who received a task, show you where a task step is assigned in workflow, and 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	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 be used to audit compliance or provide overall numbers for leadership on percentage complete.

Report Criteria:

Filter	Description
User Criteria	Select organization. 
Advanced	Task- Choose a specific task/s  Task Completion Date - check to Include Task Completion Date  Sort By - choose to sort by User or Task 
Output	Select output type. 

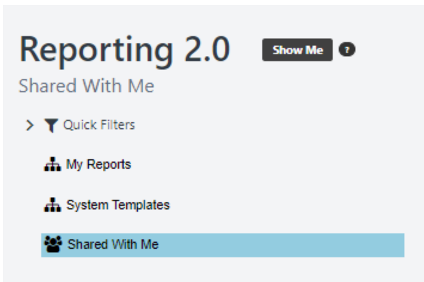
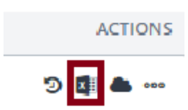
Custom Reporting 2.0

Decline to Sign Report

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

To access the Decline to Sign Report, go to REPORTS > REPORTING 2.0 > DECLINE TO SIGN.

Report Instructions:

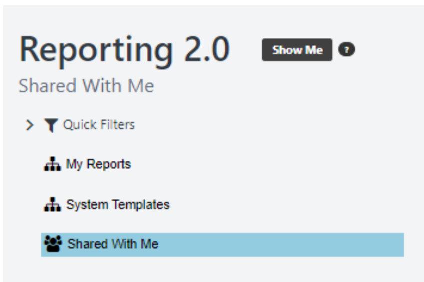
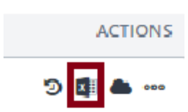
Steps	Description
Folder	Select folder Shared With Me. 
Title	Find the Decline to Sign Report under Name column.
Preview	You can select on the title to get a preview of the report. The preview is limited to 2000 records. You can download the report from this screen; however, it requires extra steps and is **not recommended**. Note: If you choose to download the report here, you will get an automated email notification notifying you of the export and link to download. Use your internet browser back arrow to go back to the main Reporting 2.0 screen.
Actions	To export the report from the main screen, select the Excel icon under Actions in the upper right side of your screen. The report will refresh upon opening.  Now, you are ready to view, save, or print the report.

Goal Weight Summary Report

The Goal Weight Summary Report enables you to review the weight assigned to each goal on the employee's annual performance plan, and filter to employees who do not have a 100% total goal weight.

To access the Goal Weight Summary Report, go to REPORTS > REPORTING 2.0 > GOAL WEIGHT SUMMARY.

Report Instructions:

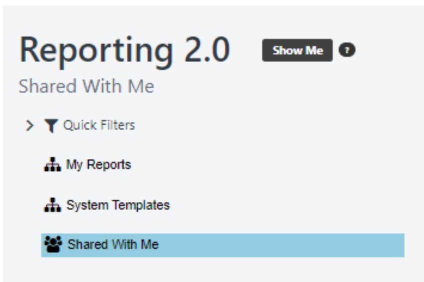
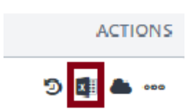
Steps	Description
Folder	Select folder Shared With Me. 
Title	Find the Goal Weight Summary Report under Name column.
Preview	You can select on the title to get a preview of the report. The preview is limited to 2000 records. You can download the report from this screen; however, it requires extra steps and is **not recommended**. Note: If you choose to download the report here, you will get an automated email notification notifying you of the export and link to download. Use your internet browser back arrow to go back to the main Reporting 2.0 screen.
Actions	To export the report from the main screen, select the Excel icon under Actions in the upper right side of your screen. The report will refresh upon opening.  Now, you are ready to view, save, or print the report.

New Position Planning Report

The New Position Performance Planning Report enables you to review a summary of those employees that have had new position performance plans launched during the performance year.

To access the New Position Performance Planning Report, go to REPORTS > REPORTING 2.0 > NEW POSITION PERFORMANCE PLANNING.

Report Instructions:

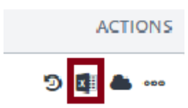
Steps	Description
Folder	Select folder Shared With Me. 
Title	Find the New Position Planning Report under Name column.
Preview	You can select on the title to get a preview of the report. The preview is limited to 2000 records. You can download the report from this screen; however, it requires extra steps and is **not recommended**. Note: If you choose to download the report here, you will get an automated email notification notifying you of the export and link to download. Use your internet browser back arrow to go back to the main Reporting 2.0 screen.
Actions	To export the report from the main screen, select the Excel icon under Actions in the upper right side of your screen. The report will refresh upon opening.  Now, you are ready to view, save, or print the report.

Performance Improvement Plan (PIP) Report

The Performance Improvement Plan (PIP) Report enables you to review a summary of those employees that have had Performance Improvement Plans launched within your organization.

To access the Performance Improvement Plan Report, go to REPORTS > REPORTING 2.0 > PIP.

Report Instructions:

Steps	Description
Title	Find the Performance Improvement Plan Report under Name column.
Preview	You can select on the title to get a preview of the report. The preview is limited to 2000 records. You can download the report from this screen; however, it requires extra steps and is **not recommended**. Note: If you choose to download the report here, you will get an automated email notification notifying you of the export and link to download. Use your internet browser back arrow to go back to the main Reporting 2.0 screen.
Actions	To export the report from the main screen, select the Excel icon under Actions in the upper right side of your screen. The report will refresh upon opening.  Now, you are ready to view, save, or print the report.

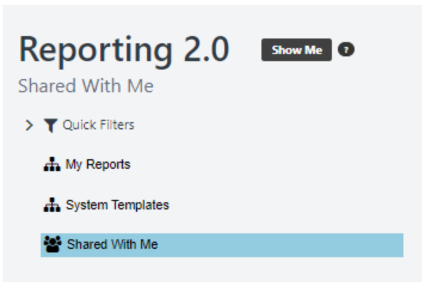
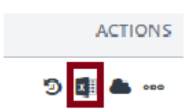
Step Status Report

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

This will provide you a list of all employees who received a task, show you where a task step is assigned in workflow, and can be used to audit compliance.

To access the Step Status Report, go to REPORTS > REPORTING 2.0 > STEP STATUS REPORT.

Report Instructions:

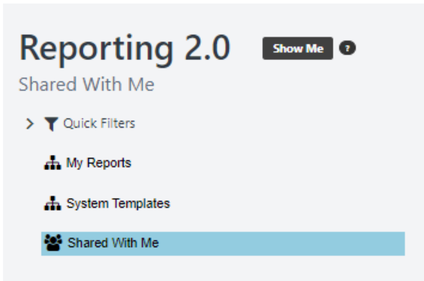
Steps	Description
Folder	Select folder Shared With Me. 
Title	Find the Step Status Report under Name column.
Preview	You can select on the title to get a preview of the report. The preview is limited to 2000 records. You can download the report from this screen; however, it requires extra steps and is **not recommended**. Note: If you choose to download the report here, you will get an automated email notification notifying you of the export and link to download. Use your internet browser back arrow to go back to the main Reporting 2.0 screen.
Actions	To export the report from the main screen, select the Excel icon under Actions in the upper right side of your screen. The report will refresh upon opening.  Now, you are ready to view, save, or print the report.

Vacancy Report

The Vacancy Report enables you to review vacant evaluator and next line supervisor positions for your organization. This can be used to ensure all reports to relationships are updated prior to the launch of a performance phase.

Report Instructions:

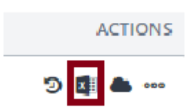
<table>
<tr><th>Steps</th><th>Description</th></tr>
<tr><td>Folder</td><td>Select folder Shared With Me.



</td></tr>
<tr><td>Title</td><td>Find the Vacancy Report under Name column.</td></tr>
<tr><td>Preview</td><td>You can select on the title to get a preview of the report. The preview is limited to 2000 records.

You can download the report from this screen; however, it requires extra steps and is not recommended. Note: If you choose to download the report here, you will get an automated email notification notifying you of the export and link to download.

Use your internet browser back arrow to go back to the main Reporting 2.0 screen.</td></tr>
<tr><td>Actions</td><td>To export the report from the main screen, select the Excel icon under Actions in the upper right side of your screen. The report will refresh upon opening.



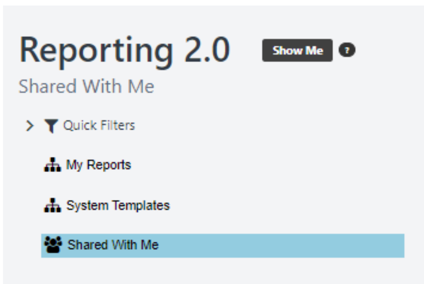
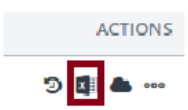
Now, you are ready to view, save, or print the report.</td></tr>
</table>

Year-End Final Rating Report

The custom Year-End Final Rating Report enables you to review a summary of the final evaluation ratings for each employee within your organization.

To access the Final Rating Report, go to REPORTS > REPORTING 2.0 > YEAR-END FINAL RATING REPORT.

Report Instructions:

Steps	Description
Folder	Select folder Shared With Me. 
Title	Find the Year-end Final Rating Report under Name column.
Preview	You can select on the title to get a preview of the report. The preview is limited to 2000 records. You can download the report from this screen; however, it requires extra steps and is **not recommended**. Note: If you choose to download the report here, you will get an automated email notification notifying you of the export and link to download. Use your internet browser back arrow to go back to the main Reporting 2.0 screen.
Actions	To export the report from the main screen, select the Excel icon under Actions in the upper right side of your screen. The report will refresh upon opening.  Now, you are ready to view, save, or print the report.