

Team Performance Dashboard Reports

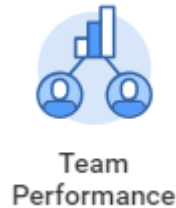
Overview

Reports available in the Team Performance Worklet will provide you with access to details of the reviews in your management chain. This includes goal setting, mid-year reviews, and annual reviews.

Who Does This: Managers

Things to Know:

- You can run many of these reports for your entire management chain instead of only your direct reports.
- You are encouraged to use these reports to stay informed about the status of any reviews within your organization.



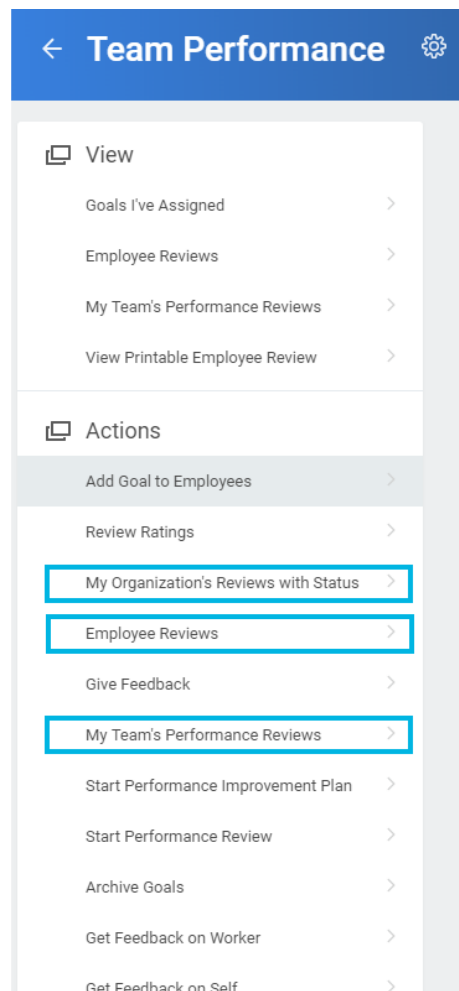
Team Performance Worklet

Select the Team Performance worklet to get started!

Under Actions, click on **More** to expand the available options. There are three useful reports that you can utilize depending on the information you desire. Here is an overall summary of the reports:

My Organization's Reviews with Status

Reports status of the review template selected for your supervisory organization and any subordinate organizations in your management chain. Shows current step and awaiting person for any in progress reviews. Provides section number ratings, overall number rating, and overall word definition rating for completed reviews.



Employee Reviews

Reports status of the review template selected for your supervisory organization and any subordinate organizations in your management chain. Shows current step and awaiting person for any in progress reviews. Provides overall word definition rating for completed reviews.

My Team's Performance Reviews

Reports all in-progress and completed reviews for your direct reports. Includes any review template that has been launched for your employees (goal setting, mid-year review, annual review)

My Organization's Reviews with Status Report

Select the Review Template you wish to review in the report.

Under the Organizations drop down, select My Organizations and check the box beside your name. Check the "Include Subordinate Organizations" box to see the review status of all employees in your management chain

The report format output is shown below. You can filter or sort by column within the Workday report and can also export this report to Excel.

My Organization's Reviews with Status Actions

Review Templates * ⋮

Organizations * ⋮

Include Subordinate Organizations

search ⋮

Search for Organization >

My Organizations >

Organizations by Type >

Employee Review	Worker	Worker's Manager	Location	Job Profile	Employee Review			Rating Category	Employee Review		
Employee Review					Goal Setting Rating	Competency Rating	Overall Rating		Status	Outstanding Step	Awaiting Persons



Click on the Excel icon to export the report

↑ Sort Ascending

↓ Sort Descending

Filter Condition * ⋮

contains

Value * ⋮

Filter

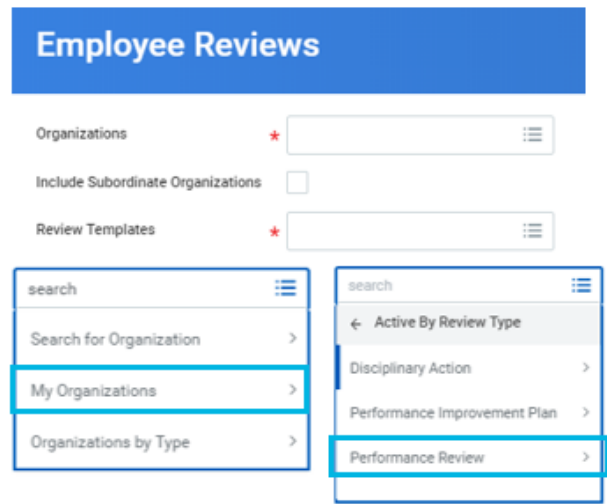
Sort by column within Workday report or filter field to contain or not contain a certain condition

Employee Reviews Report

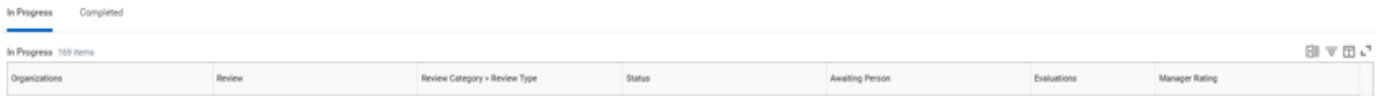
Under the Organizations drop down, select My Organizations and check the box beside your name. Check the “Include Subordinate Organizations” box to see the review status of all employees in your management chain.

Under the Review Templates drop down, select Performance Review and select the appropriate review template you wish to report. You can report on Goal Setting, Mid-Year Review, Annual Review, and New Employee Check-In Review.

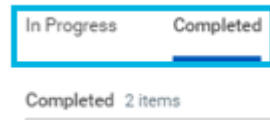
NOTE: Because of Workday security, you will not be able to pull a report on Disciplinary Actions or Performance Improvement Plans.



The report format is shown below. You can toggle between “In Progress” and “Completed” to see the reviews in that fall into each status. You can filter or sort by column within the Workday report and can also export this report to Excel.



Note: The report defaults to the “in progress” reviews but you can toggle between the two categories to see the “completed” reviews

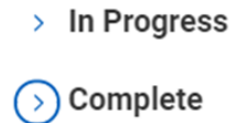


My Team’s Performance Reviews

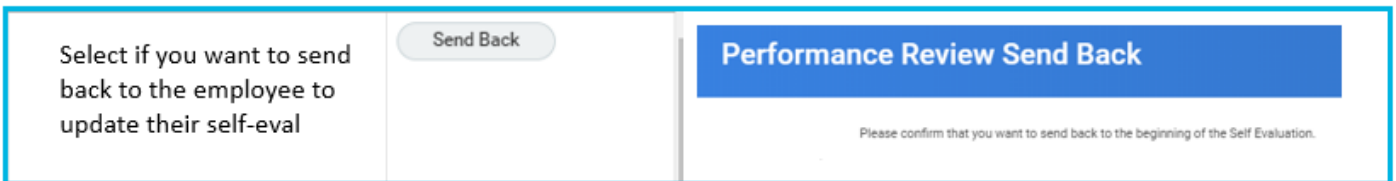
This report runs upon selecting it, as no prompts are needed. The output will provide all “in progress” and all “complete” reviews for your direct reports only. The report will pull all review templates that have been launched for your employees, so you will be able to see the status of goal setting, mid-year review, and annual review templates.



Click the > to the left of the status to expand that category.



For any In Progress reviews, you can “send back” or “complete on behalf of.”



Complete On Behalf of

Select if you want to move forward in the process because the employee has not completed self-evaluation

Complete Evaluation on Behalf Of

Please confirm that you would like to complete the Self Evaluation step on behalf of Eric Employee.

Performance Review Annual Review 2018: Eric Employee

A comment is required for either of these actions prior to submitting.