

Talent Management Reports for HRBPs

Overview

This job aid will outline the reports available to HRBPs that provide details into the various activities surrounding Talent Management.

Who Does This: HR Business Partners

PERFORMANCE AND GOAL REPORTS

Employee Reviews

The screenshot shows the configuration interface for the Employee Reviews report. It includes the following elements:

- Organizations:** A dropdown menu with a search field and a list icon. A red asterisk is next to it.
- Include Subordinate Organizations:** A checkbox.
- Review Templates:** A dropdown menu with a search field and a list icon. A red asterisk is next to it.
- Search for Organizations:** A search box with the text "search" and a list icon. A red asterisk is next to it. The dropdown menu shows: "My Organizations", "Organizations by Type", and "Organizations".
- Search for Review Templates:** A search box with the text "search" and a list icon. A red asterisk is next to it. The dropdown menu shows: "Active By Review Type", "Disciplinary Action", "Performance Improvement Plan", and "Performance Review".
- Organizations:** A text field containing "Paul Hallmann".
- Include Subordinate Organizations:** A text field containing "Yes".
- Review Templates:** A text field containing "Annual Review 2018".
- Filters:** Two buttons: "In Progress" and "Completed". The "In Progress" button is highlighted with a blue box.

Employee Reviews

View a list of employee reviews that are in progress or completed for one or more organizations and review templates. Details include the organization, review name, review type, and status. *Use this report to find status of annual reviews, mid-year reviews, follow-up reviews, goal setting template, disciplinary actions, and performance improvement plans.*

1. Under the Organizations drop down, select the supervisory organization you wish to view. Check the "Include Subordinate Organizations" box to see the review status of all employees in that management chain.
2. Under the Review Templates drop down, select the appropriate review template you wish to report.
3. The resulting report will provide any in progress and completed reviews for the template you select.

NOTE: The In-progress reviews will default when the report runs. You must toggle between "in progress" and "completed" to see the reviews in each category.

My Organization's Reviews with Status Actions

Review Templates

Organizations

Include Subordinate Organizations

search ⋮

Search for Organization >

My Organizations >

Organizations by Type >

Resulting fields included in report

Employee Review		Worker	Employee ID	Hire Date	Worker's Manager	OF Job Levels	Location	Job Profile	
ELT Member	Second Level ELT Member	Employee Review	Goal Setting Rating	Competency Rating	Overall Rating	Rating Category	Status	Outstanding Step	Awaiting Persons

Sort Ascending

Sort Descending

Filter Condition

Value

Filter

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

My Organizations Reviews with Status

Reports status of the review template selected for selected supervisory organization and any subordinate organizations in that 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.

1. Under the Review Templates drop down, select the appropriate review template you wish to report
2. Under the Organizations drop down, select the supervisory organization you wish to view. Check the "Include Subordinate Organizations" box to see the review status of all employees in the management chain.
3. The resulting report will provide all reviews that have been launched for the template and organization that you select. You can filter the resulting report if you only want to see specific values.

Workers WITH Goals Due in Current Year_LT Actions

Supervisory Organization

Include Subordinate Organizations

search ⋮

Search for Organization >

My Organizations >

Organizations by Type >

Resulting fields included in report:

Worker	Company	Location	Country	Hire Date	Supervisory Organization	Goal
Due Date	Goal Category	Goal Description	Comment	Goal Status	Created On	

Workers WITH Goals Due in Current Year_LT

Reports any goals for the current calendar year by employee for the selected supervisory organization and subordinate organizations (if checked). This report will be very useful to ensure that all eligible employees have the correct number of total goals for the year as well as goals in the correct categories. This will be very helpful to run before mid-year and annual reviews to help minimize the number of errors that employees receive because they try to submit a review but have not met the goal requirements.

1. Under the Organizations drop down, select the supervisory organization you wish to view. Check the "Include Subordinate Organizations" box to see the review status of all employees in the management chain.
2. Resulting report will provide goal details for selected organization(s) sorted by supervisory organization and then by employee last name.

Export to Excel to manipulate data or to sort/filter as needed.

Workers WITHOUT Goals Due in Current Year_LT Actions

Supervisory Organization *

Include Subordinate Organizations

search ☰

Search for Organization >

My Organizations >

Organizations by Type >

Resulting fields included in report:

Employee ID	Worker	Employee Type	Hire Date	Location	Country	Supervisory Organization
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Workers WITHOUT Goals Due in Current Year_LT

Reports employees without any goals for the current calendar year for the selected supervisory organization and subordinate organizations (if checked). This report will be very useful to check for employees who do not have any goals set up for the current year. *It will be helpful to use this report to compare against the Employee Reviews report for Goal Setting. If employees are on the Employee Reviews report but not on this report, then they still have the goal setting task outstanding but have most likely had goals cascaded by their leader.*

1. Under the Organizations drop down, select the supervisory organization you wish to view. Check the "Include Subordinate Organizations" box to see the review status of all employees in the management chain.
2. Resulting report will provide employees for selected organization(s) who do not have goals. This also includes hire date so you can determine if they have been employed over 30 days, thus should be in the process of setting goals.

TALENT REVIEW REPORTS

TM_Talent Reviews Status by Organization Actions

Organization *

Include Subordinate Organizations

search ☰

Search for Organization >

My Organizations >

Organizations by Type >

TM_Talent Reviews Status by Organization

View list of current talent profile/talent reviews that are in progress or completed for one of more organizations. Provides date launched, completion status, step awaiting action if not completed, and person awaiting action.

1. Under the Organizations drop down, select the supervisory organization you wish to view. Check the "Include Subordinate Organizations" box to see the review status of all employees in the management chain.
2. The resulting report will provide all talent reviews that have been launched for the most recent template. You can filter the resulting report if you only want to see specific values

TM_Most Recent Performance and Potential Rating

Actions

Supervisory Organization *

Include Subordinate Organizations

Resulting fields included in report:

Worker	Employee ID	Manager	Location	Hire Date	Career Level	Job Profile	Most Recent Potential Rating	2018 Annual Review Rating	2019 Follow-Up Review Rating
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TM_Most Recent Performance and Potential Rating

Returns the employee's most recent potential rating and the employee's most recent performance review rating. This includes both the 2018 annual review rating as well as the 2019 follow-up review rating (if applicable). *This report will be helpful to run prior to your 9-box calibration sessions with leaders. You can filter to return only employees at a CL5 and above.*

1. Under the Organizations drop down, select the supervisory organization you wish to view. Check the "Include Subordinate Organizations" box to see the review status of all employees in the management chain
2. Resulting report will provide employee name, location, manager, hire date, career level, job profile, most recent potential rating, 2018 annual review rating, and 2019 follow-up review rating. *Field will be blank if employee does not have a completed rating.*

TM_Potential Assessment Details

Actions

Supervisory Organization *

Include Subordinate Organizations

Resulting fields included in report:

Worker	Employee ID	Manager	Location	Hire Date	Career Level	Job Profile	Most Recent Potential Rating	Retention	Achievable Level	Loss Impact
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TM_Potential Assessment Details

Returns the current potential assessment details that are in the worker profile. This could have been completed during the talent review or the leader could have completed the potential assessment directly in the worker profile. *This report will be helpful to run prior to your 9-box calibration sessions with leaders. You can filter to return only employees at a CL5 and above.*

1. Under the Organizations drop down, select the supervisory organization you wish to view. Check the "Include Subordinate Organizations" box to see the review status of all employees in the management chain
2. Resulting report will provide employee name, location, manager, hire date, career level, job profile, most recent potential rating, retention, achievable level, and loss impact. *Field will be blank if employee does not have a completed rating.*

FEEDBACK REPORTS

Anytime Feedback Received [Actions](#)

Employee Name	Location	Feedback			
		Feedback From	Feedback Badge	Comment	Date

Anytime Feedback Received

View list of feedback given for employees to whom you have security.

1. Type “Anytime Feedback Received” in search bar, and report will automatically display. No prompts required.
2. Resulting report will provide employee name, location, feedback badge, feedback comments, date, and employee providing feedback.

Requested Feedback Awaiting Action [Actions](#)

Overall Process	Process	Status	Last Updated On	Awaiting Persons
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Requested Feedback Awaiting Action

View any in process feedback requests. These requests could be made from the employee or the employee’s leader.

1. “Type Requested Feedback Awaiting Action” in search bar, and report will automatically display. No prompts required.
2. Resulting report will provide employee for whom feedback was requested, date requested, and employee with inbox task.