Talent@VCU Reporting Guide

Overview: This guide will provide you with the description and steps for processing reports to view employees who are missing required items or the status of tasks. This guide is broken down into two sections, Goals and Performance Review reports.

Goals Reports:

Goal Exception – This report will show you all employees who do not have any goals approved.

Reports → Standard Reports → Performance → Goal Exception

1. Select Date Criteria (i.e. previous, current, or upcoming performance cycle)

2. Selecting only University and Classified Employees
   - Select User Criteria Employment Type and click the options button next to the dropdown
   - Click the small plus button next to Virginia Commonwealth University
   - Then the large plus button next to Classified and on page 2, University.
   - Click “Done” after those 2 types are added.
   - Make sure that Include Subordinates are check for both types

3. Display OU: Optional, can select “Major Budget Unit” for add this a column in the report.
4. Pending Goals: Leave Unchecked
5. Shared Goals: Leave Checked
6. Click either Printable Version or Export to Excel to run the report.
Goal Progress – This report will list all goals and the % progress of the goals for the user selected in the “User Criteria” section. This report will not display employees with no approved goals.

Reports → Standard Reports → Performance → Goal Progress

1. Select Date Criteria (i.e. previous, current, or upcoming performance cycle)

2. Selecting only University and Classified Employees
   - Select User Criteria Employment Type and click the options button next to the dropdown
   - Click the small plus button next to Virginia Commonwealth University
   - Then the large plus button next to Classified and on page 2, University.
   - Click “Done” after those 2 types are added.
   - Make sure that Include Subordinates are check for both types

3. Advanced Filters
   - Summarize Goals – Displays the total count of goals and overall % of progress
   - Show All Goals – Lists all the goals and progress % for each employee.

4. Click either Printable Version or Export to Excel to run the report.
Performance Review Reports:

**Performance Distribution** – Groups the employees by the performance review ratings.

Reports → Standard Reports → Performance → Performance Distribution Status

1. Selecting only University and Classified Employees
   - Select User Criteria Employment Type and click the options button next to the dropdown.
   - Click the small plus button next to Virginia Commonwealth University.
   - Then the large plus button next to Classified and on page 2, University.
   - Click “Done” after those 2 types are added.
   - Make sure that Include Subordinates are check for both types.

2. Select the performance review you want to report on but using the options in Advanced Filters.
   - Click the bar next to “Performance Review Task: ”
   - Select the name of the performance review from the list.
   - Leave the Performance Review Data Set: Manager

3. Click “Search” and in the output you can select Excel or Print from the results bar.
**Review Step Status** – This report will give you the status of the performance review and also if the review has been reopened, this will be listed under the status.

Reports → Standard Reports → Performance → Performance Review Step Status

4. Selecting only University and Classified Employees
   - Select User Criteria Employment Type and click the options button next to the dropdown.
   - Click the small plus button next to Virginia Commonwealth University.
   - Then the large plus button next to Classified and on page 2, University.
   - Click “Done” after those 2 types are added.
   - Make sure that Include Subordinates are check for both types.

5. Select the performance review you want to report on but using the options in Advanced Filters.
   - Click the bar next to “Performance Review Task: “.
   - Select the name of the performance review from the list.
   - Leave all the Review Steps checked.
   - Display OU – Select “Major Budget Unit” if you want to include this information in the output.

6. Click either Printable Version or Export to Excel to run the report.