Talent Management – Reports

Overview

This instructional guide identifies the steps necessary to run a report in the Talent Management system. Human Resource roles of A, H or X must proxy as their agency HR to view reports agency wide.

Definitions

The following are definitions relevant to this instructional guide:

- Talent Management – navigation tab from the People First home page where the performance management and recruiting management modules are stored.

- Home Navigation – dropdown menu appears in the header of each screen and takes you to various Talent Management modules that you have been allowed to access.

Process Steps

The following steps should be followed in order to run a report in the Talent Management system.
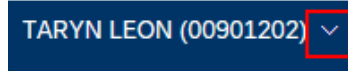
Step 1: Log in to People First.

Step 2: Select the Talent Management tile.
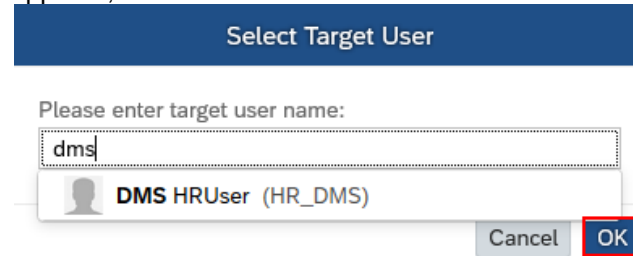
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Step 3: If you are a Human Resource role of A, H or X and are running a statewide report, select the Account Navigation dropdown arrow**.** Otherwise, to process a report as a manager or hiring manager move to step nine.

> TARYN LEON (00901202) ∨

Step 4: Select Proxy.

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> Proxy

Step 5: Begin typing your agency HR user's name, select the name when it appears, then select OK.

> **Select Target User**
>
> Please enter target user name:
>
> dms
>
> **DMS** HRUser (HR_DMS)
>
> Cancel   OK

Step 6: Select Personalize Homepage within the account navigation dropdown menu to add the Reports tile to the Talent Management home page. If the Reports tile is already displayed, move to the step eleven.

> TARYN LEON (00901202) ∨
>
> Proxy
> Options
> Admin Center
> Personalize Homepage
> Show version information
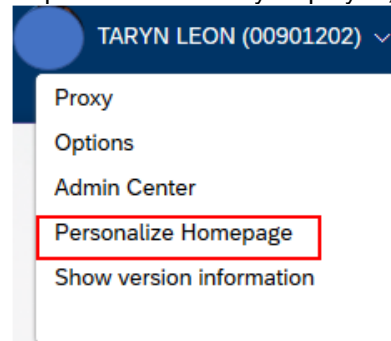
Step 7: Select the pin icon on the Reports tile to pin the tile to the Talent Management home page.

> **My Resources**
>
> Reports   📌
>
> 📊   **1**
>   Favorite
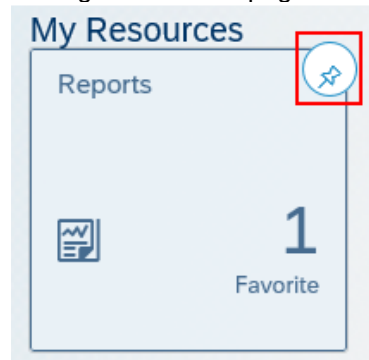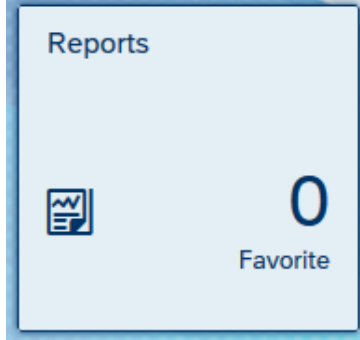
Step 8: Select the Home icon to return to the Talent Management home page.

Step 9: Select the Reports tile.

Step 10: Select the Available tab. Select the Reports dropdown. Select the Ad Hoc Reports dropdown. Hover over the desired report, then select the star icon.
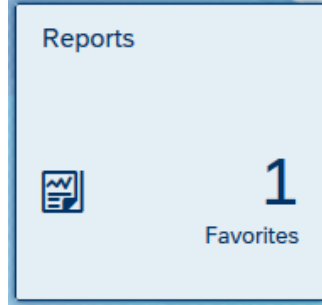

Note: The selected report will be displayed in the Favorites tab. Select the x icon to close the Reports window.

Step 11: Select the Reports tile.

Reports

1
Favorites

Step 12: Select the desired report within the Favorites or Available tab.

Reports ✕

Favorites   Available

★ Performance Plan Status Report

Step 13: If filters exist, they will be displayed.
- Applying filters is optional. If no filters are applied, the report results will be based on your agency. If running as a manager or hiring manager, the results will be based on your access.
- Select the Actions link to set the filters.
  - Select **Edit** if searching for alpha fields or selecting multiple values to filter.
  - Select **Free-Text** if searching for numerical fields.
  - Note: When filtering by First Name, Last Name or Email, it is best to use the Edit option since the filters are case sensitive.

Execute Performance Plan Status R... ✕

- ◉ Run Online   ○ Download (CSV)
- ○ Run Offline   ○ Export
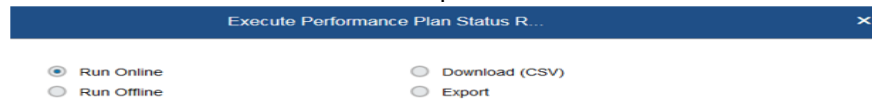
Report Name	Group Name	Column Name	Operator	Value(s)	Actions
Performance Plan Status R...	Form	Form Start Date	Greater than	1/1/2016;	⬀
Performance Plan Status R...	Form	Form End Date	Less than	12/31/9999;	⬀
Performance Plan Status R...	Subject	Subject Organization Code	In	All values are selected.;	⬀
Performance Plan Status R...	Form	Form Template Name	In	All values are selected.;	⬀

Cancel   Generate Report

Step 14: Generate the Report.
- Select "Run Online" or "Download (CSV)".
- Select the Generate Report button to run the report.

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Step 15: Select CSV to download (the desired downloading format).
- The file will open in Excel.
- Note: Always select CSV, not Excel when downloading.

Step 16: Select Return to Reports to return to the Ad Hoc Reports page.