

Viewing performance forms for your rollup

In order to see performance forms in your rollup (i.e., your team and everyone who reports up to your team):

1. Go under Analytics > List Views > Form List
2. Expand **+Filter Options**
3. Make sure that the radio button has **Team View: Starting from Myself** selected. You can then choose how many reporting layers down you want to include in your report.
4. Check that **Include** is set to **All Employees**
5. **Process View** should be set to **FY17 JHHS/JHU Performance Forms**
6. Expand **+Display Options**
7. Choose which fields you want to show.
8. Click **Update**.

Scroll down for your results. You can click on **Form Title** to see the contents of the form.

Form List

ui

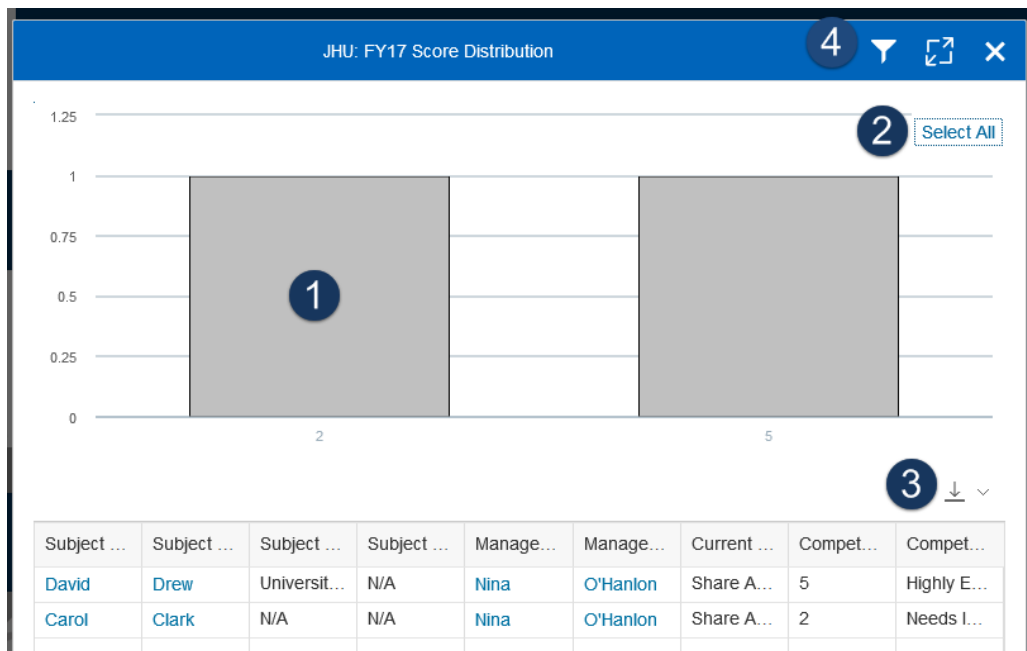
The screenshot shows the 'Form List' configuration page. At the top, there are tabs for 'Filter Options' and 'Date Options'. Under 'Filter Options', the 'Show:' section has three radio buttons: 'Team View' (selected), 'None of the above', and 'Groups'. The 'Starting from:' dropdown is set to 'Myself'. The 'Showing these levels:' section has a checkbox for 'Direct Reports' which is checked. The 'Include:' dropdown is set to 'All Employees'. The 'Process:' dropdown is set to 'FY16 Performance JHHS/JHU'. Below this, there are five columns of checkboxes for filtering: 'Personnel Area' (checked), 'Organizational Units' (checked), 'Entity' (checked), 'Job Group' (checked), and 'Employee Group' (checked). Each column contains a list of items with checkboxes. At the bottom left of the filter section is an 'Update' button. Below the filter section is the 'Display Options' section, which has a 'Columns' dropdown set to '6'. It contains six columns of checkboxes: 'Filter Info:', 'Employee Info:', 'Custom Fields:', 'Form Info:', 'Form Status:', and 'Performance:'. The 'Form Info:' column has 'Form Title' checked. The 'Form Status:' column has 'Current Stage' checked. The 'Performance:' column has 'Form Calculated Rating' checked. At the bottom right of the 'Form Info:' column is an 'Update' button.

Viewing performance scores for your rollup

In order to see performance scores in your rollup (i.e., your team and everyone who reports up to your team):

On the front page, under the section *My Team*, click on the tile called **JHU: FY17 Score Distribution**.

1. By clicking on each bar in the chart, you can see the names of the employees in that group.
2. To see a list of all employees and their scores, click **Select All**.
3. To export the list, click the down arrow. If you download in Excel format, when you open it you may get a message that the file format and extension don't match and that the file may be corrupted or unsafe. It is safe to click **Yes** and open it.
4. To see your entire rollup (the people who report to you *and* the people who report to them), open up the Filter panel.
5. Under "Levels", choose **All Levels**.



Standard
 Report Type: Team View
 Starting From: Logged In User
 Levels: Direct Reports, Level 2, Level 3, Level 4, Level 5, Level 6, Level 7, Level 8, Level 9, All Levels
 Organizational Unit: All values are selected.
 Employee Group: All values are selected.
 Form Template Name: 1 selected