2015

Generating ePerformance Quarterly Metrics

ePERFORMANCE H.R. ADMINISTRATOR

Revised:

6/25/2015

ePerformance Quarterly Metrics

From both the statewide and agency perspectives, performance evaluation metrics are important indicators of the organization's ePerformance system use and quality of performance management. Because of this, DAS requires all agencies to report upon three major ePerformance metrics:

1. Completion Rates: indicates how many documents are in a given status at a point in time.
2. Timeliness: indicates how many documents have been acknowledged in a timely manner. For purposes of the ePerformance Quarterly Metrics workbook, timeliness is derived based upon a document's acknowledgement date. A timely document is one that was acknowledged no later than 30 calendar days after the noted review period end date.
3. Ratings Trend: displays the performance rating distribution.

In order to uniformly gather this information from all agencies, boards, and commissions, DAS has developed an Excel workbook entitled *ePerformance Quarterly Metrics Template*. The workbook contains raw data as well as displaying the data in charts. By including both raw information and charts, you and your agency's leaders can easily gauge areas of strengths and opportunities for improvement.

Because evaluations are not required to be marked as "Complete" in the system until 30 days after the review period end date, report submissions will not follow the typical quarterly timelines. Below is a chart outlining what reporting period should be used, when the report should be generated, and when it should be submitted to DAS for the four quarterly cycles.

Annual Cycle	Review Period End Date	Review Period Date Range BI Prompts*	BI Report Run Date†	DAS Submission Deadline†
January	12/31	10/1 – 12/31	2/1	2/7
April	3/31	1/1 – 3/31	5/2	5/9
July	6/30	4/1 – 6/30	8/1	8/7
October	9/30	7/1 – 9/30	11/1	11/7

*******Entered on BI Prompt Page's From and To date fields*

†*If either the BI Report Run Date or the DAS Submission Deadline falls on a weekend, shift the Run Date or Submission Deadline to the next Monday (e.g., if 2/1 is a Saturday, run the reports on Monday, 2/3).*

STEP 1 – Obtaining Information from OAKS BI

To begin, two reports must be generated from BI.

> **NOTE:** Only employees with the OAKS HCM security role of *ePerformance HR Administrator* will be able to successfully access and generate the below-outlined reports.

1. ePerformance HR Administrator logs in to ***myOhio***.

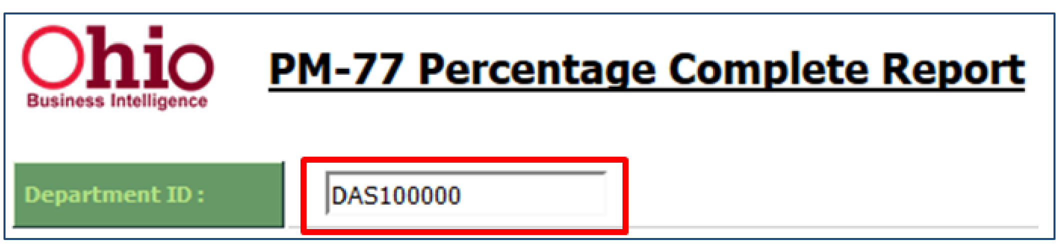
2. Click BI's ***Launch Application*** hyperlink located on the right side of the page.

Once you have successfully launched OAKS BI, you will arrive at the ***Operational Dashboard.***

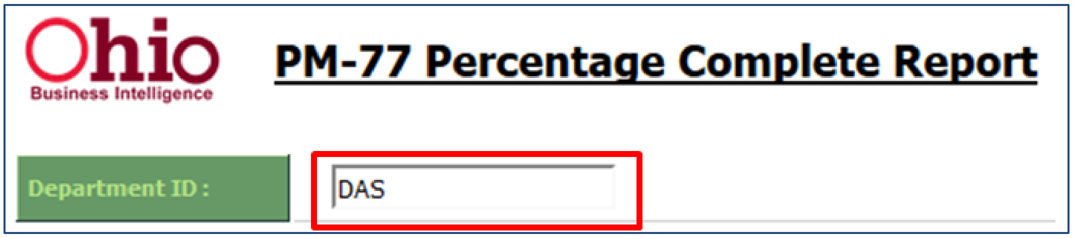
3. From the ***Operational Dashboard*** screen, you can access ***PM-77 Percentage Complete Report*** by following the path: ***Public Folders > BI Reporting Folders > BI Standard Reports > HCM > ePerformance***. Choose the ***PM-77 Percentage Complete Report***.

4. You will then arrive at the ***Percentage Complete Report Prompt Page***. The report provides users with multiple search options. Depending upon your OAKS security settings, you may be able to view the entire agency or just specific divisions, offices, units, etc. Enter the applicable information (e.g. DAS100000, DOT200000, etc.) in the ***Department*** search box if you wish to view the completion details for a specific office within your agency. If you wish to view the completion details for your entire agency, simply enter your agency's three-letter code (e.g. CSW, HFA, DAS) in the ***Department*** search box.

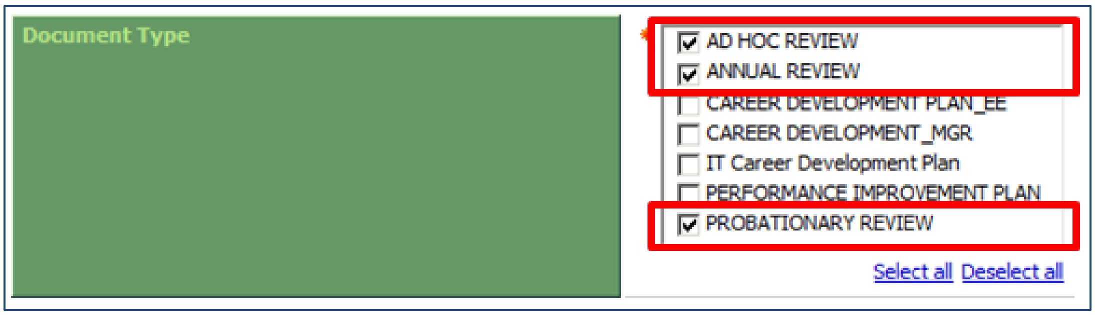
Specific Office Search Parameters:



Specific Agency Search Parameters:



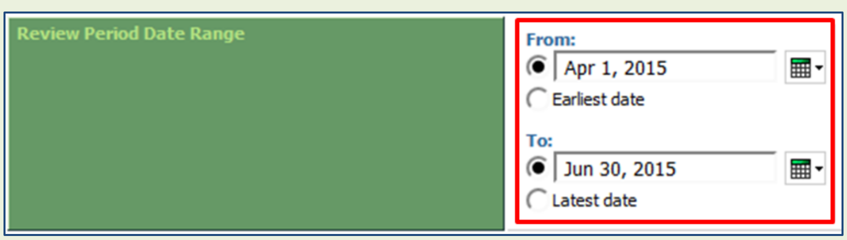
5. Select all performance-related Document Types: Ad Hoc Review, Annual Review, and Probationary Review.



6. Be sure to select the appropriate Review Period Date Range for your report. In order to obtain the most applicable information, select the appropriate review cycle begin and end dates.

NOTE: Refer to the chart below to determine the appropriate date prompt parameters.

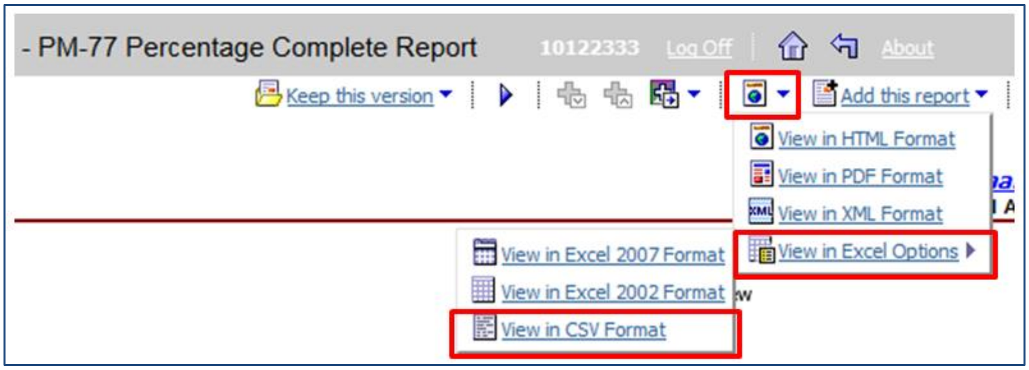
Annual Cycle	Review Period End Date	Review Period Date Range BI Prompts
January	12/31	10/1 – 12/31
April	3/31	1/1 – 3/31
July	6/30	4/1 – 6/30
October	9/30	7/1 – 9/30



7. After all search parameters are set, click the Finish button at the bottom of the screen.

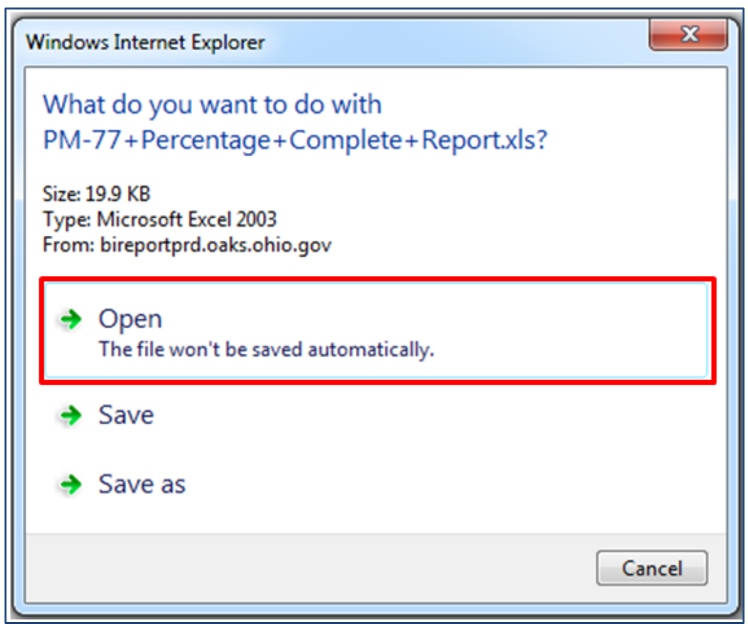
Once BI has finished processing the request, the report will display on your screen.

8. In order to utilize the data within the Quarterly Metrics workbook, you will need to download the report as a CSV file, as illustrated below. Note that downloading as a CSV file will open the report in Excel.

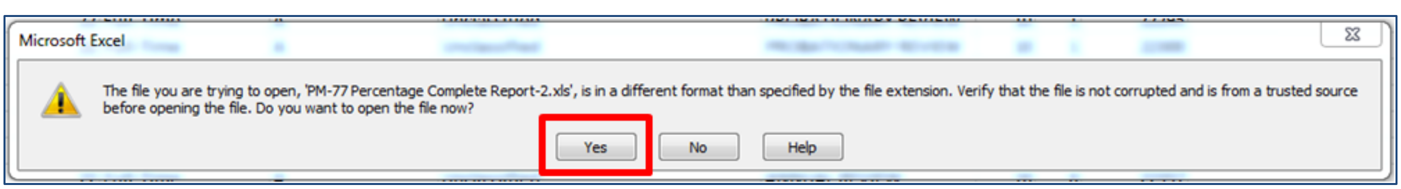


When you begin the download process, two prompts will likely appear.

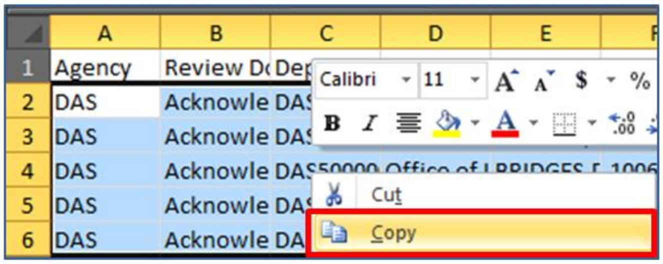
From the first prompt, click the ***Open*** option.



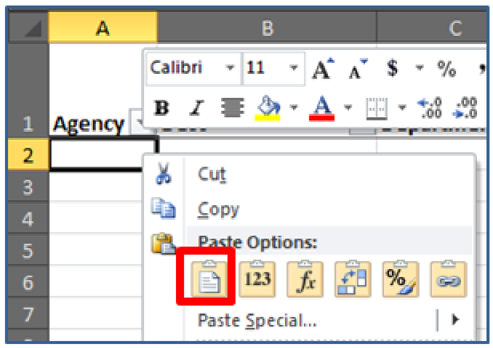
Next, open Excel, where another prompt will appear; click the ***Yes*** button. Note that the prompt on your screen may be slightly different than the example below.



9. Select all downloaded data, excluding the header row, and copy it by right-clicking and selecting Copy.



10. Paste the copied data of the ***PM-77***, or blue, worksheet of the ePerformance Quarterly Metrics Template workbook by selecting cell A2, right-clicking and selecting Paste.

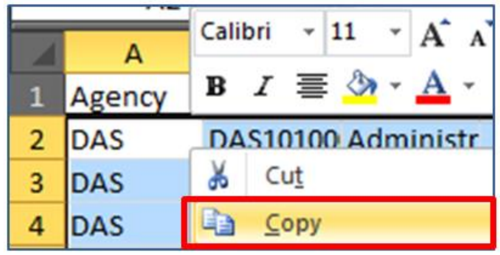


11. In BI, click the ***Return*** icon to view the ePerformance BI report list.

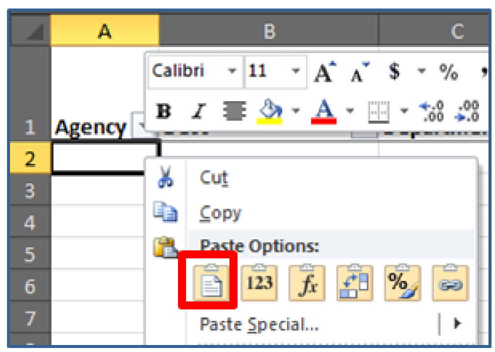
12. Repeat steps 3 through 8 above, this time running ***PM-80 Ratings Trend Analysis Report***. **Be sure to use the same Review Period Date Range prompt entries used on PM-77**.

    If BI has timed out, log back into myOhio and launch BI (refer to steps 1 and 2 above if needed), then navigate to ***Public Folders > BI Reporting Folders > BI Standard Reports > HCM > ePerformance***. Choose the ***PM-80 Ratings Trend Analysis Report***.

13. After you have obtained the report, select all downloaded data, excluding the header row, and copy it by right-clicking and selecting Copy.



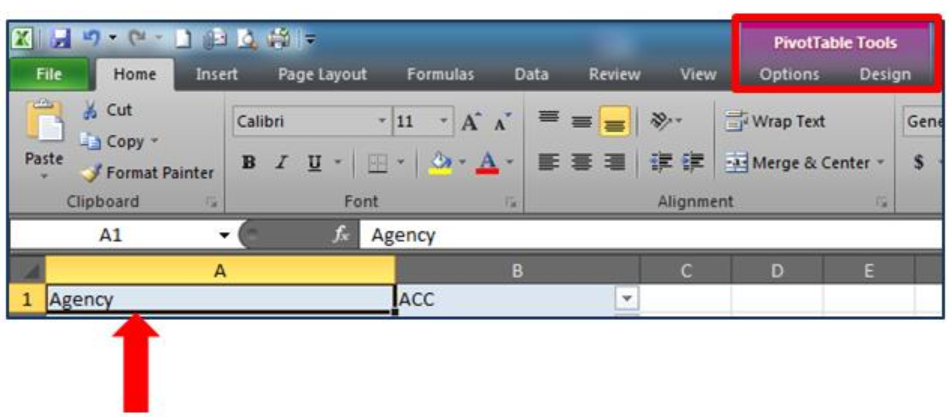
14. Paste the copied data, excluding the header row, into the ***PM-80***, or green, worksheet of the ePerformance Quarterly Metrics Template workbook by selecting cell A2, right-clicking and selecting Paste.



STEP 2 – Generating the Data Charts

Once the preceding steps have been completed, the Excel pivot tables and charts on the ***Completion Rates***, ***Timeliness***, and ***Ratings Trend*** tabs can be refreshed.

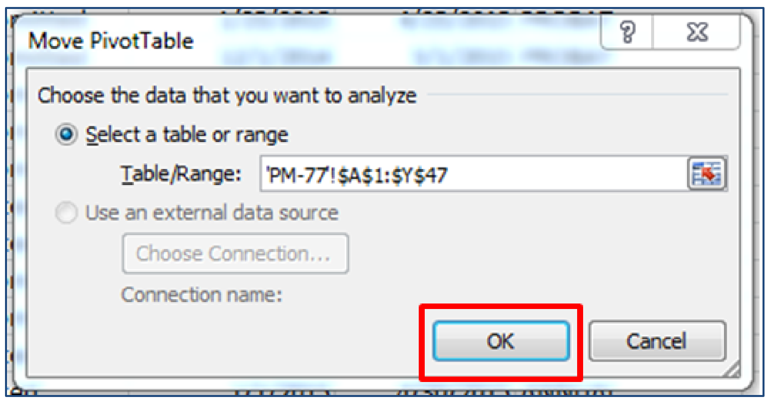
1. On the ***Completion Rates*** worksheet, click within the existing Pivot Table to activate Excel's PivotTable Tools ribbon group.



From the Options sub-ribbon, click the ***Change Data Source*** button.

The PM-77 worksheet will activate and the ***Change PivotTable Data Source*** window will appear.

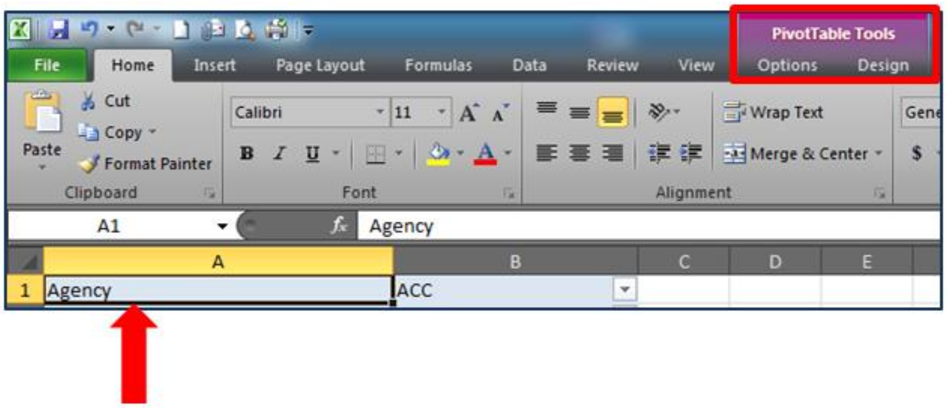
Ensure that all data, including the headers, on the PM-77 worksheet is surrounded by the flashing marquis outline by selecting all data with your mouse, then click the ***OK*** button.



NOTE: The Table/Range parameters illustrated above may differ when you select your data. Please be sure to select all available data when performing this step.

The data within the Pivot Table as well as the Pivot Chart will update based upon the revised selection.

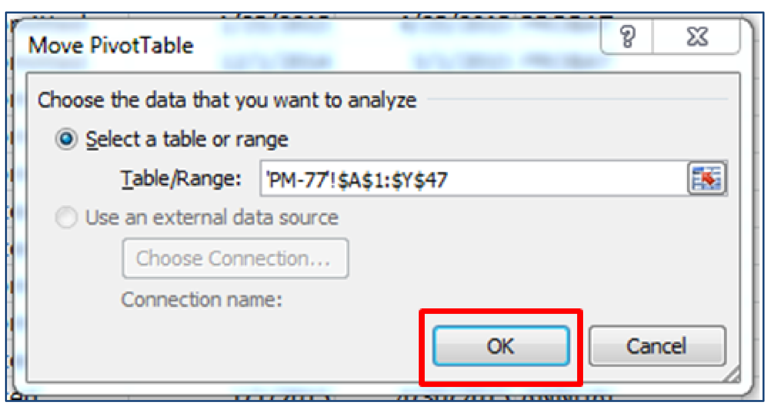
2. On the ***Timeliness*** worksheet, click within the existing Pivot Table to activate Excel's PivotTable Tools ribbon group.



From the Options sub-ribbon, click the ***Change Data Source*** button.

The PM-77 worksheet will activate and the ***Change PivotTable Data Source*** window will appear.

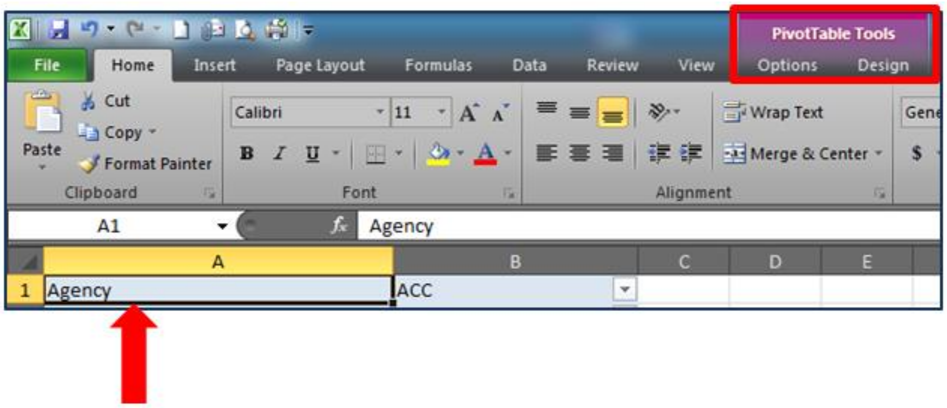
Ensure that all data on the PM-77 worksheet is surrounded by the flashing marquis outline by selecting all data with your mouse, then click the ***OK*** button.



NOTE: The Table/Range parameters illustrated above may differ when you select your data. Please be sure to select all available data when performing this step.

The data within the Pivot Table as well as the Pivot Chart will update based upon the revised selection.

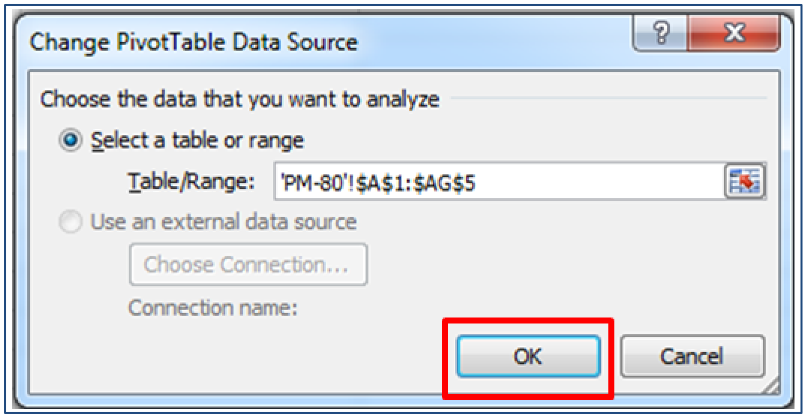
3. On the ***Ratings Trend*** worksheet, click within the existing Pivot Table to activate Excel's PivotTable Tools ribbon group.



From the Options sub-ribbon, click the ***Change Data Source*** button.

The PM-80 worksheet will activate and the ***Change PivotTable Data Source*** window will appear.

Ensure that all data on the PM-80 worksheet is surrounded by the flashing marquis line by selecting all data with your mouse, then click the ***OK*** button.



The data within the Pivot Table as well as the Pivot Chart will update based upon the revised selection.

STEP 3 – Providing the Information to DAS

Once the Excel workbook is updated, send it to ePerformance@das.ohio.gov no later than the ***seventh calendar day*** following the end of the reporting period.

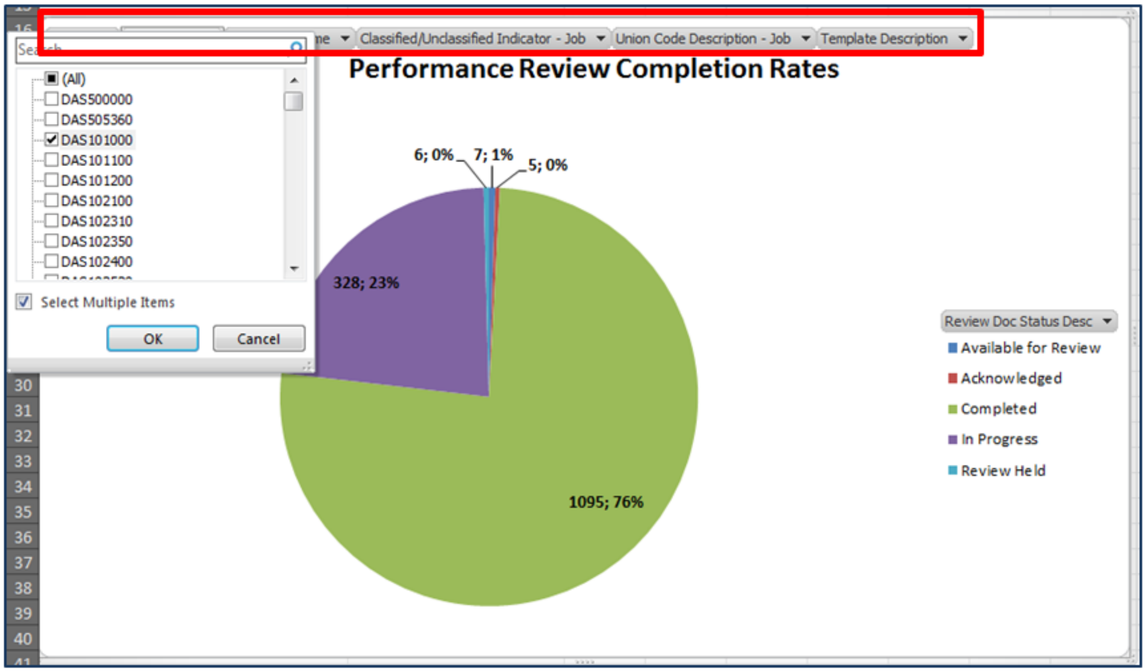
NOTE: Refer to the chart below to determine the appropriate submission deadline.

Annual Cycle	Review Period End Date	DAS Submission Deadline†
January	12/31	2/7
April	3/31	5/9
July	6/30	8/7
October	9/30	11/7

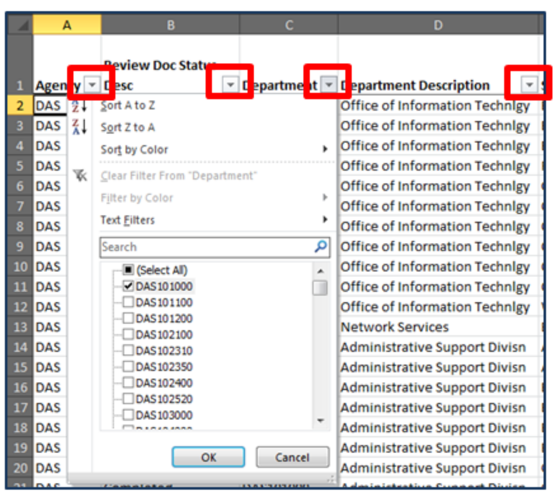
†If either the BI Report Run Date or the DAS Submission Deadline falls on a weekend, shift the Run Date or Submission Deadline to the next Monday (e.g., if 2/1 is a Saturday, run the reports on Monday, 2/3).

STEP 4 – Analyzing the Data

Once the data has been sent to DAS, use the ***in-chart filters*** to visually understand specific employee populations within your agency. Click the filter areas to select specific portions of the agency (as pictured below).



Similarly, the ***data filters*** present on both the PM-77 (blue) and PM-80 (green) worksheets will help you drill down to specific departments or supervisors to determine what improvements may need made. Like the chart filter illustrated above, click a column title's filter button to select specific portion s of the agency.



Analyzing the data in this manner helps paint a picture of your agency's current performance management procedures. The questions below are designed to help you think critically about the information contained within the workbook and to help you improve your agency's future metrics.

- ➔ What completion rate improvement opportunities exist?
- ➔ What timeliness improvement opportunities exist?
- ➔ What steps should I take to facilitate improvement?
- ➔ How can I encourage those groups that consistently complete their documents on time to continue to do so?
- ➔ Is there a particular division or department that needs to work through completing most of their documents?
- ➔ Is there a supervisor who needs extra assistance in working through the system?

After you have completed any necessary follow-up or improvement tasks, you may find it helpful to run these reports again to determine whether your efforts were successful.