

# Succession Planning Job Aid: Constructing the 9-Box

## Obtaining Information from OAKS BI:

1. Open an Internet browser and navigate to [myohio.gov](http://myohio.gov)
2. Enter your OAKS user ID and password and click the **Sign In** link. If you cannot remember your OAKS user ID and/or password, please contact the OAKS helpdesk by calling 614-644-6625.

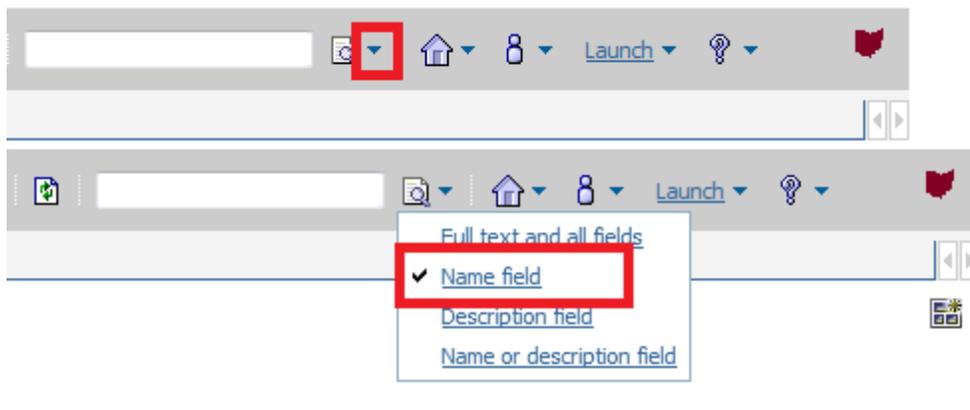


3. Click the **Launch Application** link located on the right side of the page in the second box.





4. Once you have successfully logged into OAKS BI, you will arrive at the **Operational Dashboard**.
5. From the **Operational Dashboard** screen, you can access the **Ratings Trend Analysis Report** by following the path: **Public Folders > BI Reporting Folders > BI Standard Reports > HCM > ePerformance**, or you can search for the report by clicking the arrow next to the search box located in the top right portion of the screen. Select the **Name Field** search option. See the screenshots below for further reference.



6. Type the title of the report in the search box, then click the **Search** icon to the right of the box.



7. The search will produce reports that match the search criteria. Choose the option **PM-80 Ratings Trend Analysis Report**.



If multiple reports appear with the same title (PM-80 Ratings Trend Analysis Report), select the report with the most recent “last modified on” date.

Search: [Name field](#) ▾

[Advanced](#) ▾

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...> [Name](#) ▾

[PM-80 Ratings Trend Analysis Report](#)  
Last modified on: September 4, 2014 1:29:01 PM

8. You will then arrive at the ***Ratings Trend Analysis Report Prompt Page***. The report provides agencies with multiple search. Depending upon your OAKS security setting, 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 Ratings for a specific office within your agency. If you wish to view the Ratings for your entire agency, simply enter your agency’s three letter code (e.g. CSW, HFA, DAS) in the ***Department*** search box. Other search options will be discussed later in this document.

**Specific Office Search Parameters:**



**PM-80 Ratings Trend Analysis Report**

Department ID:



## Entire Agency Search Parameters:



## PM-80 Ratings Trend Analysis Report

Department ID:

Be sure to retain the default Document Type selection of **Annual Review**. Probationary and Ad Hoc Review ratings should *not* be considered when constructing your 9-Box.

**Document Type**

- AD HOC REVIEW
- ANNUAL REVIEW
- CAREER DEVELOPMENT PLAN\_EE
- CAREER DEVELOPMENT\_MGR
- IT Career Development Plan
- PERFORMANCE IMPROVEMENT PLAN
- PROBATIONARY REVIEW

[Select all](#) [Deselect all](#)

Remember that succession planning positions and potential successors may only be derived from exempt positions, so be sure to select the **Exempt** choice from the **Union Code** prompt.

**Union Code**

- 1199
- AFSCME
- EXEMPT
- OSTA
- OEA
- FOP

[Select all](#) [Deselect all](#)



Also, be sure to select the appropriate **Date Period Range** for your report. In order to obtain the most up to date information, select your agency's annual review cycle begin and end dates.

A screenshot of a web application interface. On the left is a green rectangular area with the text "Review Period Date Range". To the right is a form with two sections: "From:" and "To:". Each section has a radio button selected next to a date field. Under "From:", "Jul 1, 2013" is selected. Under "To:", "Jun 30, 2014" is selected. There are also radio buttons for "Earliest date" and "Latest date". A red box highlights the date selection fields.

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.

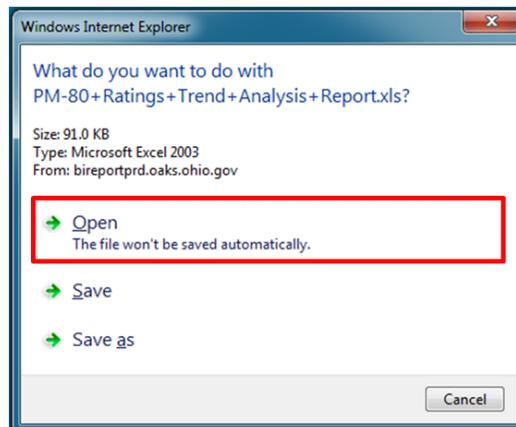
9. In order to successfully construct your 9-Box, you will need to download the report as a CSV file, as illustrated below. Note that downloading as a CSV file will open the report in Excel.

A screenshot of a web application interface showing a report titled "PM-80 Ratings Trend Analysis Report". The report header includes "Log Off", "Home", and "About" links. Below the header is a toolbar with "Keep this version" and "Add this report" options. The main content area displays the report title and a table with columns: "Title", "Reports To - Job", "Supervisor Employee ID", "Supervisor Name", "Union Code - Job", and "Union Code Descripti - Job". A dropdown menu is open over the table, showing options: "View in HTML Format", "View in PDF Format", "View in XML Format", "View in Excel Options", "View in Excel 2007 Format", "View in Excel 2002 Format", and "View in CSV Format". The "View in CSV Format" option is highlighted with a red box.

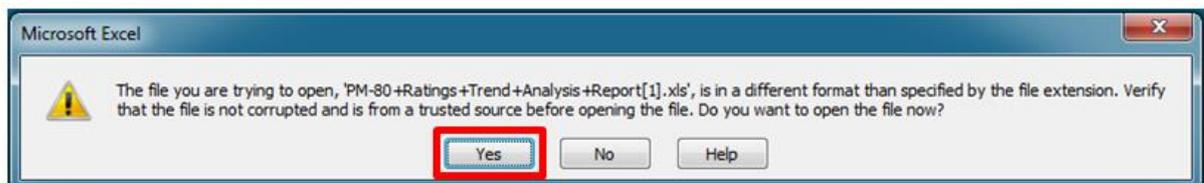


When you begin the download process, two prompts will likely appear.

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



Next, open Excel, where another prompt will appear; click the *Yes* button.



10. Once the report has been successfully downloaded, filter on the department, office, functional team or supervisor for which you are constructing a 9-Box. Note: the current maximum capacity for the 9-box is 28 employees.

## Inserting Data into the 9-Box Tool:

1. Copy the filtered data from the downloaded *PM-80 Ratings Trend Analysis Report*. A few helpful hints:
  - ➔ Do not copy the column header row (e.g., Excel row 1).
  - ➔ Only copy cells that lie within Excel columns **A** through **AA**.



2. Open the Data Table tab of the 9-Box Tool. Click cell B13 to activate it, then paste the data into the sheet.
3. Click the ***Populate 9-Box*** button at the top of the Data Table sheet.

After you click the button, the populated 9-Box will display. Note that, if your 9-Box does not display as expected, click the link entitled ***If 9-Box Does not Automatically Populate*** for assistance.

4. Insert a copy of the populated 9-Box into your agency's Succession Plan. This may be done by using your computer's Snipping Tool, by printing or saving a PDF of the 9-Box, or by using your keyboard's Print Screen button.

