

# Reporting: University & Classified Staff Steps for Supervisor and HR Liaison

## Login into the Cornerstone homepage

Welcome - Realize Your Potential: c X +

https://lax-sl5proxy.csod.com/LMS/catalog/Welcome.aspx?tab\_page\_id=-67&tab\_id=-1

University of Colorado Boulder

You are currently logged in as [Redacted]

On Friday, February 8, 2019 from 6:30 PM MST to 11:30 PM MST, your portal will be briefly unavailable due to a software update.

Welcome, [Redacted]

To the University of Colorado Boulder's new Performance Management Solution.

**Why Performance Management Matters**

Effective performance management processes like the one in place at CU Boulder can help organizations and individuals achieve excellence by:

- Aligning work and resources to clearly defined institutional aspirations and imperatives
- Establishing clear expectations between employees and supervisors around work, professional development, and career growth opportunities
- Reinforcing organizational values

Effectively setting and reviewing individual employee expectations and closely tying them to the University's Strategic Imperatives not only enhances performance in an effective and efficient way, but also builds a collaborative relationship between an employee and their supervisor that is focused on using feedback as a professional tool.

**Performance Evaluation Process**

**What can I expect this year?**

The entire performance management process will consist of:

1. An initial planning exercise
2. A formal coaching check-in between supervisors and employees to review plan progress

**My Performance Plan**

**My Inbox**

No Items

**My Tasks**

**Menu**

- Home
- My Performance Plan
- My Tasks
- My Profile
- My Performance Reviews
- Reports

My Account

Log Out

You will see the same option for both classified and University staff

- **Navigate to the main menu**
- **Click on the Reports option**

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My Performance Plan

Menu >

Reports >

Standard Reports

My Account

Log Out

- Click “Standard Reports”

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Menu >

Reports v

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My Performance Plan

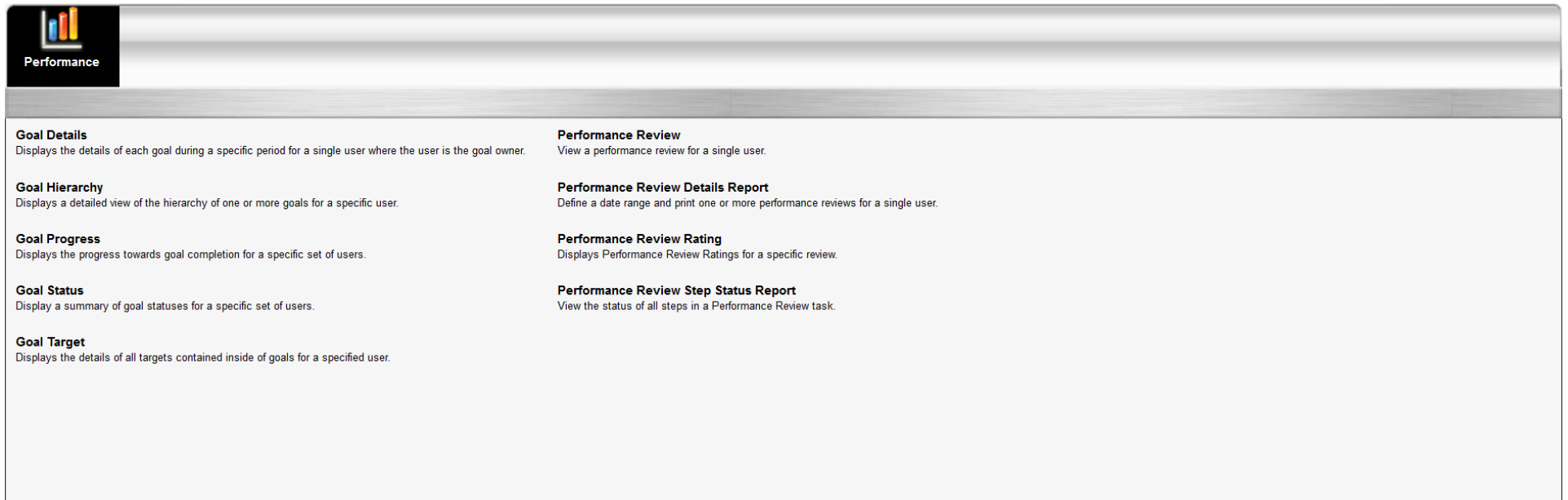
- Click on the “Standard Reports” option
- A list of all possible reporting options will appear

# Supervisor/Manager Reports

Supervisors and managers will have access to running the following reports for all of their direct and all of their indirect reports only:

## Reports

Click on a report category to view those reports. You may search for any reports by title or description.



|   |  |
|---|--|
| <b>Goal Details</b><br>Displays the details of each goal during a specific period for a single user where the user is the goal owner. | <b>Performance Review</b><br>View a performance review for a single user.  |
| <b>Goal Hierarchy</b><br>Displays a detailed view of the hierarchy of one or more goals for a specific user.                          | <b>Performance Review Details Report</b><br>Define a date range and print one or more performance reviews for a single user. |
| <b>Goal Progress</b><br>Displays the progress towards goal completion for a specific set of users.                                    | <b>Performance Review Rating</b><br>Displays Performance Review Ratings for a specific review.                               |
| <b>Goal Status</b><br>Display a summary of goal statuses for a specific set of users.   | <b>Performance Review Step Status Report</b><br>View the status of all steps in a Performance Review task.                   |
| <b>Goal Target</b><br>Displays the details of all targets contained inside of goals for a specified user.                             |  |

**Goal Details:** Displays the details of each goal during a specific period for a single user where the user is the goal owner.

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**Goal Progress:** Displays the progress towards goal completion for a specific set of users.

**Goal Status:** Display a summary of goal statuses for a specific set of users.

**Goal Target:** Displays the details of all targets contained inside of goals for a specified user.

**Performance Review:** View a performance review for a single user.

**Performance Review Details Report:** Define a date range and print one or more performance reviews for a single user.


**Performance Review Rating** (This report will be used for calibration of direct reports and indirect reports): Displays Performance Review Ratings for a specific review.

**\*\*\*Performance Review Step Status Report:** (The report to review where in the work flow employees and supervisors are, for all tasks)

(All tasks are : Goal planning, Coaching, Year End review). View the status of all steps in a Performance Review task.

# HR Liaison-Cornerstone Partners

You will have access to running the following reports for all employees within your unit:



**Performance**

|   |  |
|---|--|
| <b>Bulk Performance Reviews</b><br>Generates performance review printouts in bulk given a specific performance review task or date range and user criteria. | <b>Goal Tasks Summary</b><br>Displays details of all tasks contained inside of goals for a specific user or OUs.                               |
| <b>Goal Details</b><br>Displays the details of each goal during a specific period for a single user where the user is the goal owner.                       | <b>Performance Review</b><br>View a performance review for a single user.  |
| <b>Goal Exception</b><br>Displays all users who do not have approved goals within the selected time criteria.   | <b>Performance Review Details Report</b><br>Define a date range and print one or more performance reviews for a single user.                   |
| <b>Goal Hierarchy</b><br>Displays a detailed view of the hierarchy of one or more goals for a specific user.  | <b>Performance Review Distribution</b><br>Search for a specific review task and optionally set user criteria to display a distribution report. |
| <b>Goal Progress</b><br>Displays the progress towards goal completion for a specific set of users.  | <b>Performance Review Rating</b><br>Displays Performance Review Ratings for a specific review.   |
| <b>Goal Status</b><br>Display a summary of goal statuses for a specific set of users.   | <b>Performance Review Step Status Report</b><br>View the status of all steps in a Performance Review task.                                     |
| <b>Goal Target</b><br>Displays the details of all targets contained inside of goals for a specified user.   | <b>Task User Status</b><br>Displays the status of 1 or more tasks for any organizational unit  |

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**Performance Review:** View a performance review for a single user.

**Performance Review Details Report:** Define a date range and print one or more performance reviews for a single user.

**Performance Review Rating:** Displays Performance Review Ratings for a specific review.

\*Please Note: This report will be used for calibration and departmental distribution of ratings

**Performance Review Step Status Report:** View the status of all steps in a Performance Review task.

\*Please Note: This report allows a user to review each step in the work flow for employees and supervisors within all tasks.

**Task User Status:** Displays the status of 1 or more tasks for any organizational unit

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## Reports

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- Click on the report you wish to view.



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[Reports >](#)

### Performance Review Step Status Report

#### Report Criteria

View the status of all steps in a Performance Review task.

#### USER CRITERIA

User Criteria: The availability criteria that you select will only include employees who meet the following criteria: (Department is or below B-EVCAA-Athletics or User is or below Tracy Tripp)

Select Criteria



#### ADVANCED FILTERS

Performance Review Task:  

Review Steps: Review steps will appear when a task is selected

Display OU:

#### OUTPUT

 Printable Version  Export to Excel



- **Select the task for which you would like to view reporting data.**

SearchTask - Mozilla Firefox

https://lax-sl5proxy.csod.com/common/popups/SearchTask.aspx?q=^^^3YTfoya%2

## Search Tasks

**Search Tasks :**

Title:  All Languages  « Previous 1-1 of 1 Next »

### Tasks

| NAME   | DESCRIPTION                                     |
|--|---|
| <b>2019-2020 University Staff Performance Planning</b> | 2019-2020 University Staff Performance Planning |

javascript:callbackJavascript(27, '2019-2020 University Staff Performance Planning', 32)

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#### ADVANCED FILTERS

Performance Review Task:

Review Steps:  Supervisor Review  
 Employee Acknowledgment

Display OU:

#### OUTPUT

- Select the button to export to excel.

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[Reports](#) >

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#### OUTPUT

[Printable Version](#) [Export to Excel](#)

- **Navigate to the main menu if you wish to run another report.**