WAYNE STATE
Human Resources
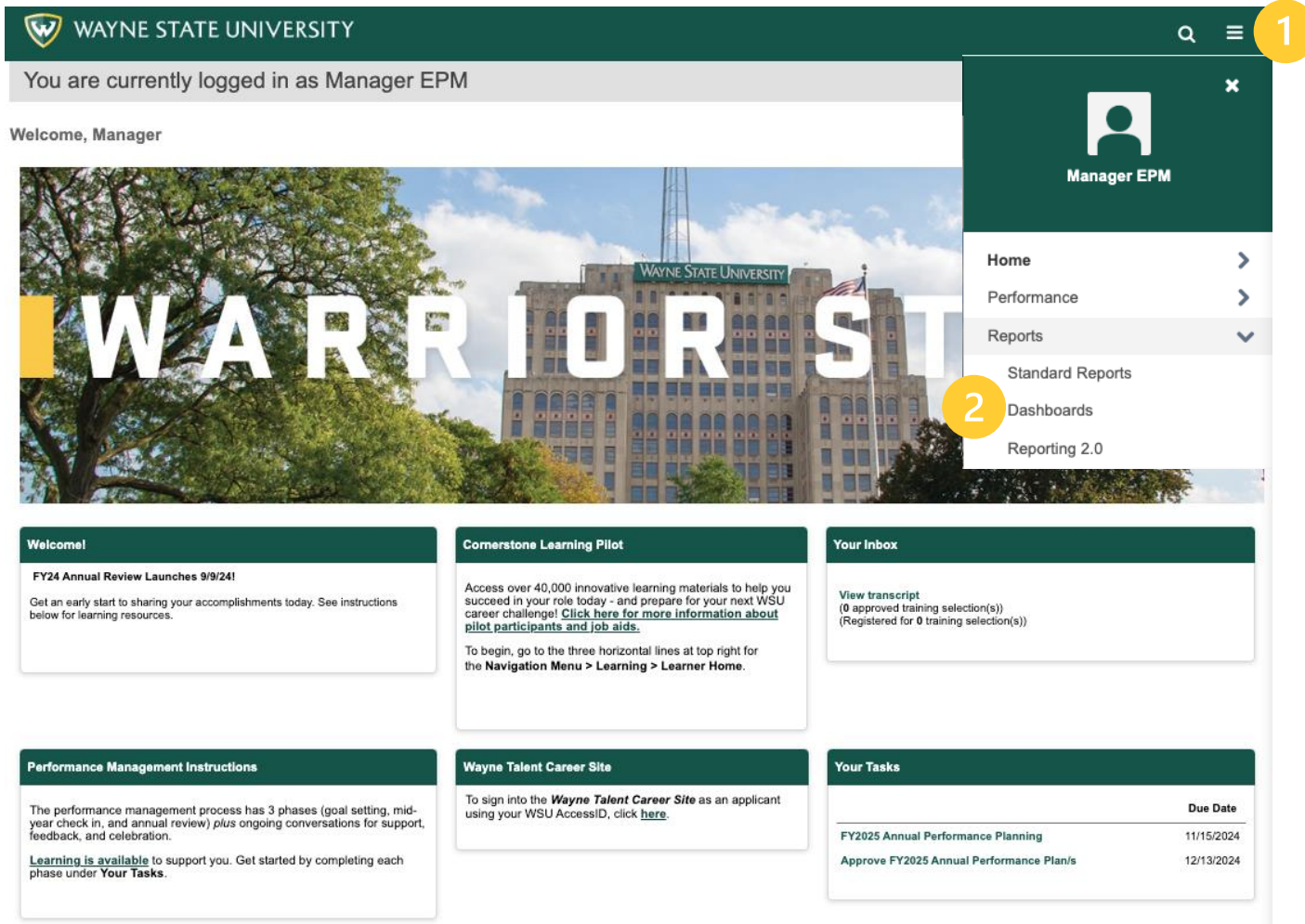
cornerstone
conversations

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Annual Review:
Leader Dashboard

Instructions for navigating the Cornerstone system to view the dashboard for
Annual Review completion status reporting

October 2024

To View Leader Dashboard options:

1. From the Cornerstone Conversations homepage, select the Navigation icon on the top left.

2. Select **Reports > Dashboards** from the drop-down menu.
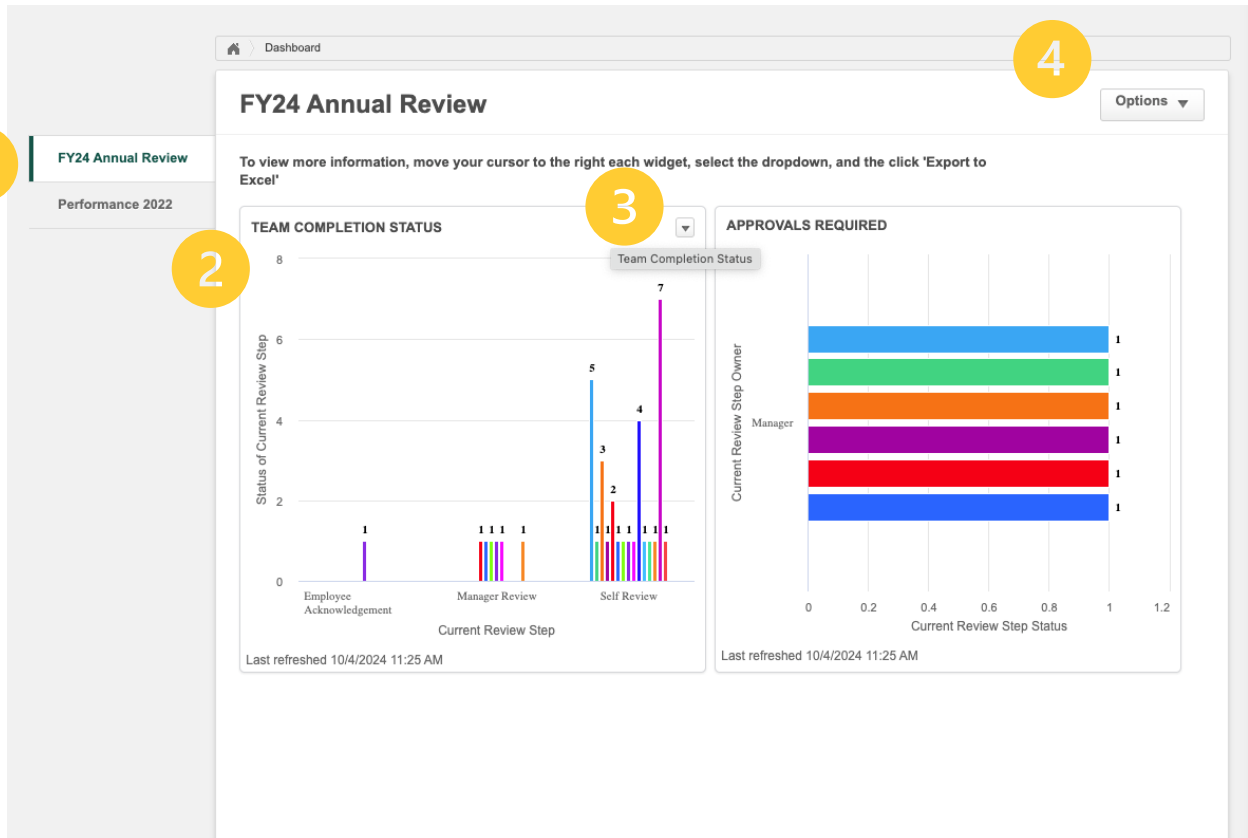
1. Select the current performance management task from the left menu, such as **FY24 Annual Review.**

2. *Two reporting options exist on this dashboard:*

   Team Completion Status: Provides the completion status for all direct and indirect reports. This is a "master report" for all three steps included in this process (employee review manager review, and employee acknowledgement).

   Approvals Required: Provides a list of direct and indirect reports who have submitted their employee review for manager review.

   Note: If you are a second level manager, you will see a list of the employees who report to you that require action as well as a list of the employees who have submitted their review to each of your direct reports. This can be helpful to review when:

   • You are curious about what actions are required on your part, and for whom

   • You are coaching your team on process expectations/accountabilities

3. Move your cursor within each "widget" or box available to see the **drop-down arrow** in the top right appear. Use this to **refresh** (update) report data or **export** to Excel.

4. The **Options** drop-down enables all dashboard report data to be refreshed (updated) and charts to be printed.

   Note: Colors on the charts have no formal meaning and are only used to differentiate the bars of the chart. To see more information about each bar, move hover over it using your cursor.

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This report provides the completion status for all direct and indirect reports on your team for all three steps included in this Annual Review process (employee review, manager review, and employee acknowledgement).

Note: The visual chart may be less useful than simply exporting the report data to Excel.

1. Hover over widget to see **drop down arrow** at top right. Click **Refresh**.

2. The **View Details** option enlarges the visual chart. Close it out to hover over each bar in the chart, if desired.

   Each bar indicates how many employees are at that current step for you and any leader reporting to you. For example, in **Self-Review**, there is a blue line with the number 5 above it. This indicates that there are 5 employees reporting to you or a given manager on your team in that step of the process.

3. Use the drop-down arrow in #1 above to **Export to Excel.** Review your team's completion status report, including:

   - **Employee Overall Status:** Appears as complete, in progress or not started.

   - **Current Review Step:** Identifies which of the 3 steps the employee is currently within.

   - **Status of Current Review Step:** References the deadline for the current step in the system and indicates:

     - **Past due** if the deadline has passed and it has not yet been started.

     - **In progress** if it has been started, but the date is before the deadline.

     - **Not started** if no action was taken but the date is before the deadline.

   Note: duplicate rows will appear for an employee because the Annual Review has multiple steps. A row for each step complete or in progress will appear per employee.

Annual Review: Approvals Required Report

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This report provides a list of direct and indirect reports on your team who have submitted their employee review for manager review.

If you are a second level manager, you will see a list of the employees who report to you that require action as well as a list of the employees who have submitted their review to each of your direct reports. This can be helpful to review when:

- You are curious about what actions are required on your part, and for whom

- You are coaching your team on process expectations/accountabilities

Note: The visual chart may be less useful than simply exporting the report data to Excel.

1. Hover over widget to see **drop down arrow** at top right. Click **Refresh**.

2. The **View Details** option enlarges the visual chart. Close it out to hover mouse over each bar in the chart, if desired.

   There is a bar for each employee who submitted a review. If you are a second level leader, there is a bar for each leader on the team who has at least one employee who submitted a review. If the latter, the total number of employees who submitted a review is indicated by the number.

3. Use the drop-down arrow in #1 above to **Export to Excel.** Review your team's completion status report, including:

   - **Current Review Step Owner**: "Manager" will be listed on all rows.

   - **Current Review Step Status**: If the manager review has been:

     - Started it will be listed as "in progress"

     - Submitted it will be listed as "complete"

     - Not been opened quite yet, it will be listed as "not started"

APPROVALS REQUIRED

| View Details |
| Export to Excel |
| Refresh |

Select the dropdown, and the click 'Export to Excel'

Current Review Step Owner — Manager

Values: 1, 3, 5, 4, 4, 5, 1, 4, 4

Current Review Step Status (0–6)

Last refreshed 10/15/2024 10:42 AM
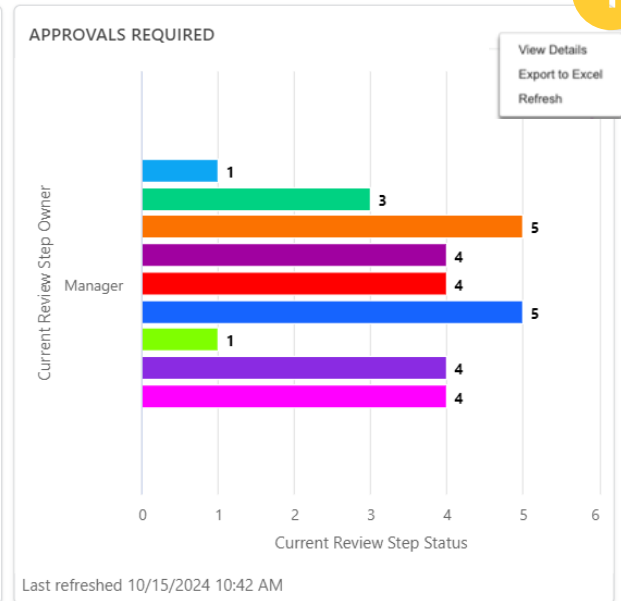
Manager	Employee	Performance Review Task	Current Review Step Owner	Current Review Step Status	SCD
		FY2024 Annual Review - NRNA	Manager	Not Started	
		FY2024 Annual Review - NRNA	Manager	Not Started	
		FY2024 Annual Review - Staff Association	Manager	In Progress	
		FY2024 Annual Review - NRNA	Manager	Complete	
		FY2024 Annual Review - NRNA	Manager	Not Started	
		FY2024 Annual Review - NRNA	Manager	In Progress	