

## Instructions for Performance Rating Maintainer: BI Performance Review Reports

There are two performance review reports available in BI that you may find beneficial.

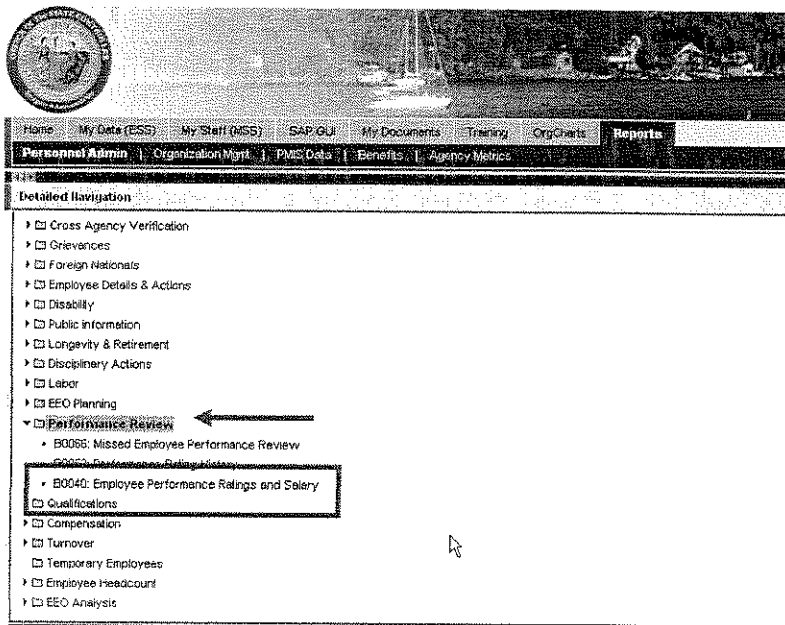
BI Performance Review Reports	Information Provided
B0066: Missed Employee Performance Review	Provides a list of employees (& their personnel ID #s) for an organizational unit in which no rating code was entered ("Rating Not Entered) for a performance cycle.  <i>Note: This report would be helpful to run after performance ratings have been entered to ensure all employees received a rating code.</i>
B0040: Employee Performance Ratings & Salary	Provides a list of employees (& their personnel ID #s) for an organizational unit and includes their performance rating and salary for a performance cycle.

**Remember, information entered in SAP will not immediately display on BI Reports but should display the following day.**

### How to Run a BI Performance Review Report

For this example, these instructions will show you how to run a B0040 Employee Performance Rating report:

1. Go to <https://mybeacon.nc.gov> and log into the BEACON portal using your NCID log-on ID and password.
2. Click on the "Reports" tab.



3. Click on “Performance Review” and then select “B0040 Employee Performance Ratings & Salary.”
4. For this report, the “OrgUnit” and “Year Cycle Ended” date field are mandatory.

**B0040: Employee Performance Ratings and Salary**

**Variable Entry**

Available Variables:  Save Save As... Delete [Show Variable Personalization](#)

General Variables		
Variable	Current Selection	Description
Organizational Unit	<input type="text"/>	<input type="checkbox"/>
Year Cycle Ended (Single Value, Mandatory)		<input type="checkbox"/>
Employee(s) PersNo. (Optional)		<input type="checkbox"/>

OK Check

5. Next to OrgUnit, you can enter the 8-digit org unit number for the location that you wish to run the report (*Remember – all org unit numbers begin with the number 2*). If you do not know the org unit number, click on the  **Detail** icon. Your individual security access will determine which org units you can view.
6. Once the Org Unit pop-up appears, click to select the appropriate Org Unit. Once highlighted, then click the **Add** button to add to your “Selections.” Then click **OK**.

Select values for Organizational Unit (ZHMMA\_ORGUNIT) 0003

Show view: All


Search:  Clear

Add Remove

Type	Description
2000000042	Correction 200000042

OK Cancel

The Org Unit pop-up will disappear and the org unit number should be displayed.

- Next to "Year Cycle Ended," click on the  Detail icon.

**B0040: Employee Performance Ratings and Salary**

**Variable Entry**

Available Variants:  Save Save As... Delete Show Variable Personalization


General Variables		
Variable	Current Selection	Description
* Organizational Unit	20006365	<input type="checkbox"/>
* Year Cycle Ended (Single Value, Mandatory)		<input checked="" type="checkbox"/>
Employee(s) PersNo. (Optional)		<input type="checkbox"/>

OK Check

- The "Fiscal Year" Pop-Up will appear.

To generate report data for Cycle 24, click to select "2012."

(Note: "2011" would generate report data for Cycle 23).

Then click .

Select values for Year Cycle Ended (Single Value, Mandatory) |

Show view: All


Maximum: 1000 Refresh

Fiscal year key

2007
2008
2009
2010
2011

Enter a value for Fiscal year:

OK Cancel

- To generate the report, click .

**B0040: Employee Performance Ratings and Salary**

**Variable Entry**

Available Variants:  Save Save As... Delete Show Variable Personalization

General Variables		
Variable	Current Selection	Description
* Organizational Unit	+20006365(ORGUNIT)	<input type="checkbox"/> 20006365 COR SO DS1 HR DIRECTOR 3
* Year Cycle Ended (Single Value, Mandatory)	2011	<input type="checkbox"/> 2011
Employee(s) PersNo. (Optional)		<input type="checkbox"/>

OK Check

10. To print the report, select **“Print Version”** and the data will be converted to an Adobe PDF file for printing. If you wish to export the data to Excel, click **“Export to Excel.”**

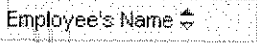



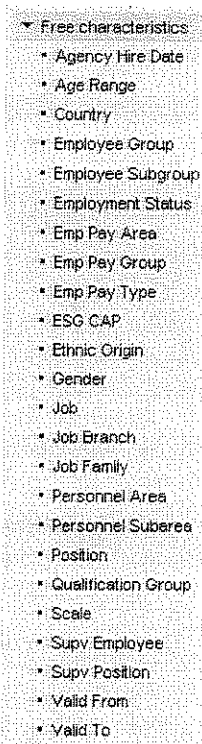
## General BI Report Information:

Remember, report data is current as of the previous night (i.e. information entered in SAP today will not show on a BI Report until tomorrow. In some cases, it may take longer to display).

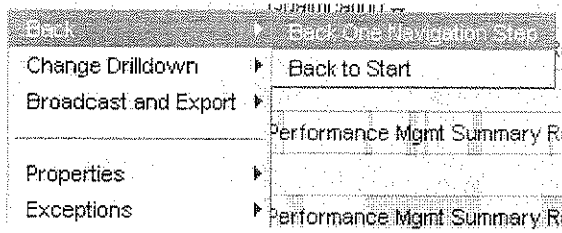
- Default information in the B0040 report (i.e. default columns) includes Organizational Unit, Employee ID, Employee Name, Qualification, Proficiency (Rating), and Annual Salary. The first column determines the order of the report data. Since the Organizational Unit number is the “default” first column, the report is in order by the Org Unit number.

*Note: The Employee ID (personnel ID#) column will be helpful when you are entering performance ratings in SAP because you can enter the employee's personnel ID number to pull up the employee's performance record using transaction code PA30.*

- Information on BI reports can be manipulated and changed and organized differently. If you prefer for the report to be in order by employee name, click on the  column (you will see a hand and finger icon), and hold and drag to the first line of the first column (do not click directly on the  up/down arrow to move a column). Once the line shows bold, release and your report data should now show Employee Name as the first column and your report data should be in alphabetic order by the employee's last name. Any of the columns can be moved, dragged, and dropped the same way.
- To remove a column from the report, simply click on the column header and drag and release outside the report area.
- To add additional data, click to select the desired data from the “Free characteristics” area (see below) and drag, drop, and release in the place in the report you wish the data to be added.



- To “undo,” right mouse click within the report to get the following pop-up:



Select “**Back,**” then “**Back One Navigation Step.**”

- To organize Performance data by rating code, click on the Proficiency Q/R column and hold and drag to the first line of the first column. Once the line shows bold, release and your report data should now be organized by rating code.