Overview of Standard Tiles

…and comparison to dashboard 1.0 portlets

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Safe Harbor Statement

This document contain description of tiles that is currently available.

All product features and delivery dates mentioned represent current product development expectations only and not a delivery commitment. These features may not be delivered in the indicated time frame or at all. Customers should base their purchasing, administrative, and configuration decisions solely on functionality that is currently available.

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Tiles vs Portlets vs Standard Dashboards

This document go through the dashboard tiles available in SuccessStore. All future standard content for the dashboard framework will be tiles. The main reason is that it is the most flexible mechanism for sharing standard content because customers can adopt the tiles they like and mix'n'match the tiles into dashboards as they please.

You will see that the document compare the tiles to portlets in dashboards 1.0 framework and charts that may have existed in existing standard dashboards. This is to show you how you can replace the old content from dashboards 1.0 and standard dashboards with the new tiles.

What is the difference between a tile, a standard dashboard and the old portlets in dashboards 1.0?

Dashboard Tiles are the future of dashboards. They are fast, flexible and has intelligent logic for how it visualize depending on the amount of data. Each tiles is independent, so administrators can mix'n'match tiles into the dashboards they need. There is also a tool for administrators to build their own simple tiles. Partners or Professional Services can build more advanced custom tiles at additional cost, but at a much lower price than standard dashboards (because they are more simple now that each tile is a separate entity).

Standard dashboards are part of dashboards 2.0 framework. But they are slower than tiles, hardcoded and has complex logic that may not always work for all customers. When installing a standard dashboard you cannot edit or hide any of the charts, so you have to accept all charts as is. If one of the charts in the dashboard does not work, users will see a dashboard with a broken chart inside… not ideal. Customized dashboards can be created via costly engagements with partners or professional services.

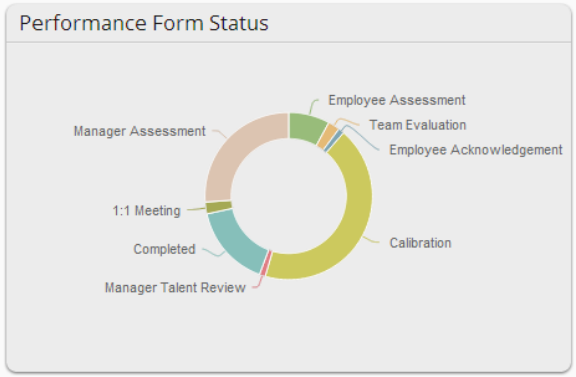
Dashboard 1.0 portlets are hardcoded, non-editable, only works in dashboard 1.0 framework. No customization or custom content is possible in the dashboard 1.0 framework. The framework only covers a couple of modules and have had no enhancements in several years. Dashboards 1.0 will eventually be sunset, so you should move off dashboards 1.0 framework as soon as possible.

We strongly recommend that you switch to using tile-based dashboards only and that you replace the standard dashboards and the dashboard 1.0 portlets you currently might have in your instance.

There are standard tiles that replace most of the content that ever existed in dashboards 1.0 portlets and standard dashboards. On top of that you can build your own tiles to have even more content. Therefore, we recommend that cusotmers start leveraging tile-based dashboards and stop using the dashboard 1.0 portlets or standard dashboards.

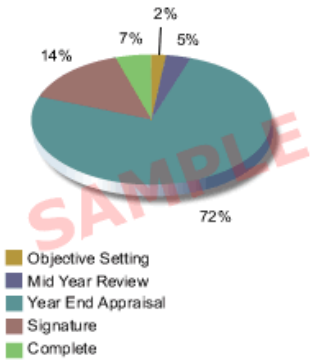
Performance Management

Performance Form Status

Screenshot:	Usage:	Data:
	Use this tile during performance review cycle to monitor progress of the forms. Tip: Consider deactivating this tile when there is no performance review cycle. Columns In Details View: Document ID Current Route Step Name Status Form Title Current Owner Username Current Owner First Name Current Owner Last Name Form Start Date Form End Date Form Due Date	Show the route map step name of performance forms that are in progress. Forms that are completed shows the status text. You should know… • If there are multiple route maps used you will see all steps from all route maps. If the step names are identical, they will be combined. • If route map has had steps renamed, you may see more steps than currently in route map. For example if some forms had a step called Goal Setting, then the route map was renamed Objective Setting for new forms, the pie chart will show a slice for each name. Reporting Schemas Required: • Performance Management

Dashboard 1.0 equivalent portlet

Form Status Grouped by Workflow

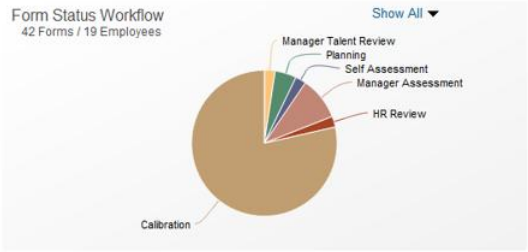


Main difference:

Old Portlet	New Tile
Shows a new chart for each route map	Combine all route maps into one chart
Shows all form types in one chart	Shows only performance forms (there is an identical tile for other types of forms).
Has additional information about employee count in the top of the portlet	There is no additional information.

Equivalent chart in standard dashboard

Form Status Workflow



Main difference:

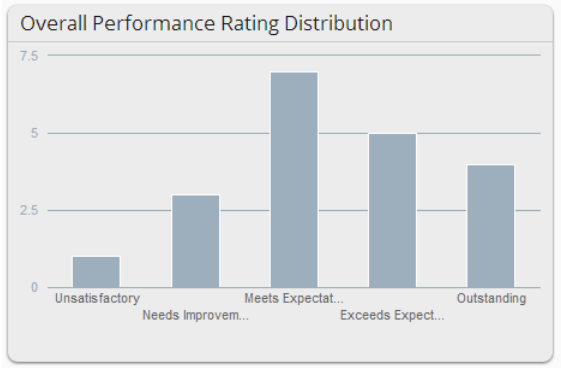
Old Chart in Standard Dashboard	New Tile
Allow user to switch between routemaps	Combine all route maps into one chart
Has additional information about employee count in the top of the chart.	There is no additional information.

The chart comes as part of the following dashboards:

- Performance Dashboard
- Performance and Competency Dashboard

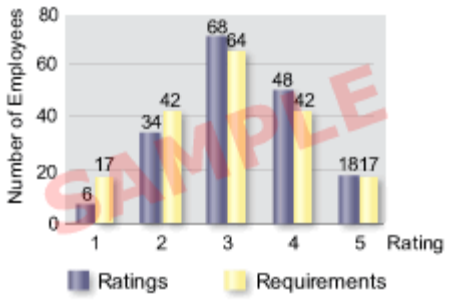
Charts from standard dashboards only works in the context of that dashboard. They cannot be used as a separate tile to mix with other charts. Recommendation is to use the tile – not the standard dashboard. Read more here.

Performance Overall Rating Distribution

Screenshot:	Usage:	Data:
	See if the distribution of performance ratings for the selected people match the desired distribution. Tip: Consider deactivating this tile when there is no performance review cycle. Columns In Details View: Document ID Form Title Overall Performance Rating Description Subject Username Subject First Name Subject Last Name	Count number of forms by overall performance rating label. The x-axis displays labels defined in the rating scale used to give the ratings. You should know… • Forms must have an overall performance rating label to be shown in the chart. • The rating must have a rating scale ID to appear in the chart. • The rating scale must have a value in the user's language. • If the labels in the rating scale has been changed since the form was saved, the form will not appear in the chart. • Unrated forms will not appear. • If multiple rating scales are in use the chart could look a bit strange. See special section about "Rating scale charts" for further details. • If forms have multiple owners they will appear several times in the list view. Reporting Schemas Required: • Performance Management • Rating Scales

Dashboard 1.0 equivalent portlet

Overall Rating Distribution

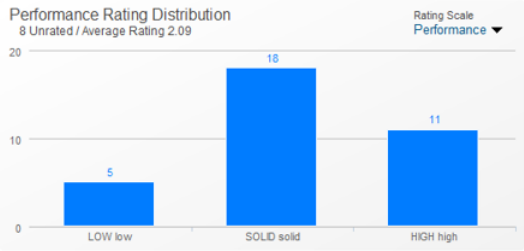


Main difference:

Old Portlet	New Tile
Shows a target distribution (the bell curve in the background).	No target distribution bell curve – tile just shows the actual ratings.
Shows numbers on the x-axis	Shows the rating labels on the x-axis
Calculated by converting number rating to a number on the scale. Rounding rules is set in the dashboard configuration. This can cause some confusion if a rating is set using one scale but then displayed on another scale.	Shows the rating labels as it is shown on the form. There is no re-calculation of the rating so it will always match the rating label on the form.
Works for all forms with a number rating.	Form must have rating label and rating scale ID.

Equivalent chart in standard dashboard

Form Status Workflow



Main difference:

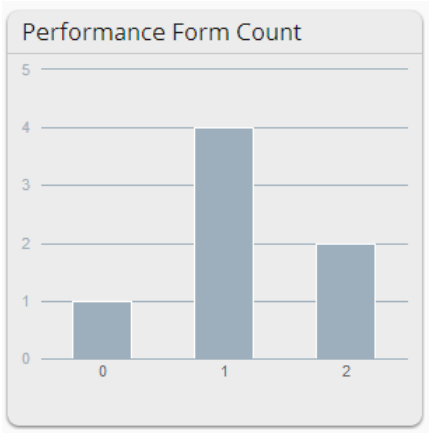
Old Chart in Standard Dashboard	New Tile
Calculated by converting number rating to a number on the scale. User can select which scale to display the ratings on.	Show the rating label as it is on the form. No conversion or calculation is done.
Has additional information about unrated forms and average rating in the top of the chart	There is no additional information.

The chart comes as part of the following dashboards:

- Performance Dashboard
- Performance and Competency Dashboard

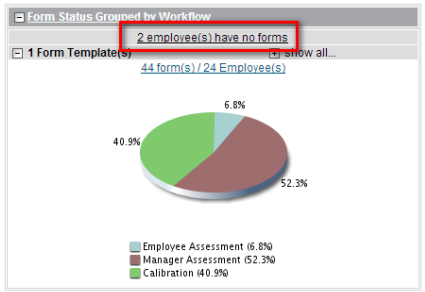
Charts from standard dashboards only works in the context of that dashboard. They cannot be used as a separate tile to mix with other charts. Recommendation is to use the tile – not the standard dashboard. Read more here.

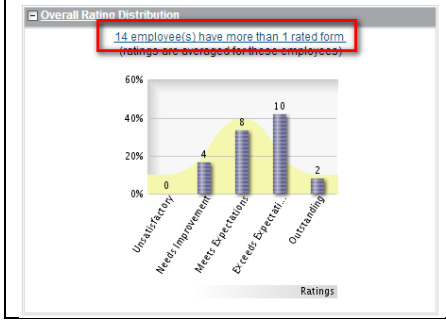
Performance Form Distribution

Screenshot:  	<u>Usage:</u> See if there are users that have no forms or people that have more than one form. This tile can be used in a dashboard together with the other performance management tiles to validate if data filters return the desired scope. <u>Columns In Details View:</u> Username First Name Last Name	<u>Data:</u> Count number of forms per user. This tile combines a list of users from employee profile with count of forms from performance management. Users in the employee profile list that are not found in the list from performance management are marked as having “no forms”. The drill down list is the employee list from employee profile. You should know… • Deleted forms are not included. • User must have permissions to see username. • NB! In case you are changing drill down columns, username must stay as a first column in drill down list. <u>Reporting Schemas Required:</u> • Performance Management

Dashboard 1.0 equivalent portlet

This portlet does not exist in dashboards 1.0. But the information exist as links inside two portlets in dashboards 1.0. See highlighted areas in screenshot below.

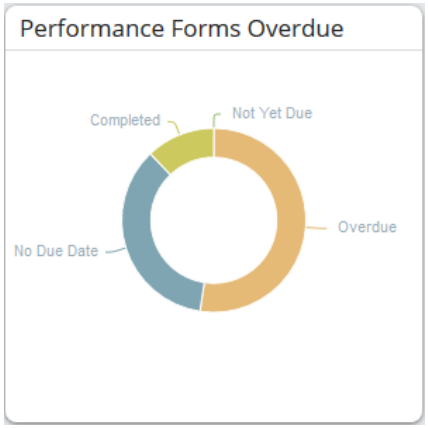




Main difference:

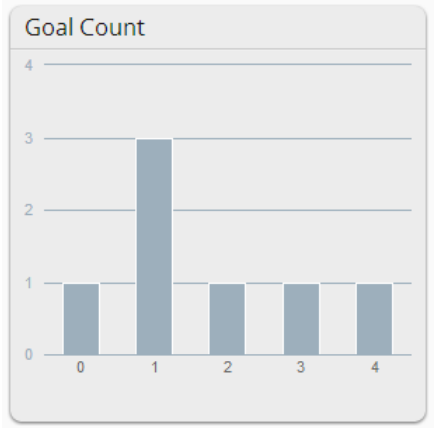
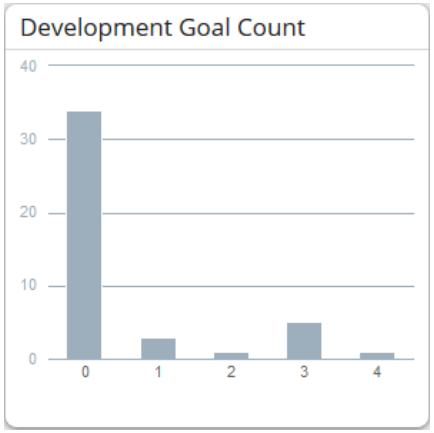
Old Portlet	New Tile
Link to employees with no forms is part of the portlet Form Status Grouped by Workflow.	Count of users with no forms is a column in the chart.
Link to all employees with more than one form is part of the Overal Rating Distribution. There is just one link to this list regardless of how many forms the users have.	You can see in the chart how many people have 2,3,4,etc forms.

Performance Forms Overdue

Screenshot:  	<u>Usage:</u> See if there are users that have forms overdue. This tile can be used in a dashboard together with the other performance management tiles to validate if data filters return the desired scope. <u>Columns In Details View:</u> Document ID Step Due Date Status Current Route Step Name Form Title Current Owner Username Current Owner First Name Current Owner Last Name	<u>Data:</u> Show the overdue of performance forms that are in progress. You should know… • Deleted forms are not included. <u>Reporting Schemas Required:</u> • Performance Management

Objective Tiles

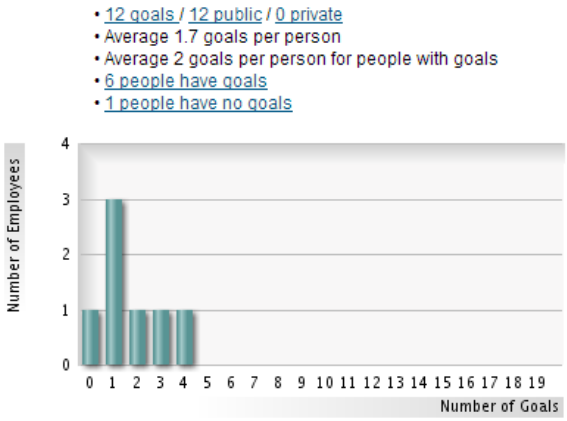
Objective Distribution

Screenshot:  	<u>Usage:</u> See if there are users that have too many or too few goals. Or no goals at all. <u>Columns In Details View:</u> Username First Name Last Name	<u>Data:</u> Count number of goals per user. This tile combines a list of users from employee profile with count of goals from goal management. Users in the employee profile list that are not found in the list from goal management are marked as having “no goals”. The drill down list is the employee list from employee profile. You should know… • It is important to select this the correct goal template to get data for current year’s goal plan. • Deleted goals and goals without an owner are not included. • User must have permissions to see username. • NB! In case you are changing drill down columns, username must stay as a first column in drill down list. <u>Reporting Schemas Required:</u> • Goal Management
Screenshot:  	<u>Usage:</u> See if there are users that have too many or too few development goals. Or no goals at all. <u>Columns In Details View:</u> Username First Name Last Name	<u>Data:</u> Count number of development goals per user. This tile combines a list of users from employee profile with count of development goals from goal management. Users in the employee profile list that are not found in the list from goal management are marked as having “no goals”. The drill down list is the employee list from employee profile. You should know… • It is important to select this the correct goal template to get data for current year’s goal plan. • Deleted goals and goals without an owner are not included. • User must have permissions to see username. • NB! In case you are changing drill down columns, username must stay as a first column in drill down list.

		Reporting Schemas Required: • Development Goal Management

Dashboard 1.0 equivalent portlet

Objective Distribution

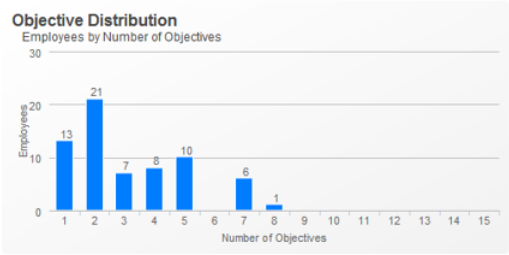


Main difference:

Old Portlet	New Tile
Shows 0,1,2,3….18,19, 20-50, 50+	Chart shows all values that has at least one user. For example if there are users with 0, 2, 4 and 5 goals only these 4 values are shown.
Has additional information about private goals and average number of goals.	Has no additional information. Tip: You can create separate charts yourself with this information if needed.

Equivalent chart in standard dashboard

Objective Distribution



Main difference:

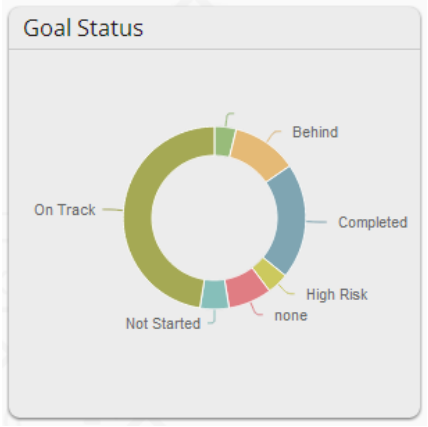
Old Chart in Standard Dashboard	New Tile
Shows 1,2,3….14,15 . Did not include people with 0 goals.	Chart shows all values that has at least one user – including users with 0 goals. For example if there are users with 0, 2, 4 and 5 goals only these 4 values are shown.

The chart comes as part of the following dashboard:

- Objective Dashboard

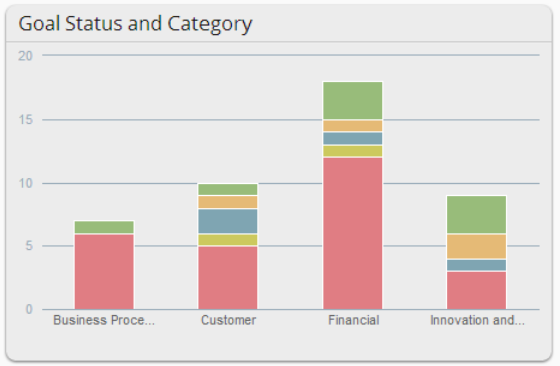
Charts from standard dashboards only works in the context of that dashboard. They cannot be used as a separate tile to mix with other charts. Recommendation is to use the tile – not the standard dashboard. Read more here.

Objective Status

Screenshot:	Usage:	Data:
	See the status of the goals in your team. Columns in Detail View: Goal ID Commitment Status Complete Category Start Date Due Date Owner Username Owner First Name Owner Last Name	Count number of goals by status. You should know… • Deleted goals are not included. Reporting Schemas Required: • Goal Management

Objective Status by Category

Screenshot:



Usage:

See the status of the goals in your team by category.

Columns in Detail View:

- Objective ID
- Commitment
- Status
- Complete
- Category
- Start Date
- Due Date
- Owner username
- Owner First Name
- Owner Last Name

Data:

Count number of goals by status and category.

You should know…

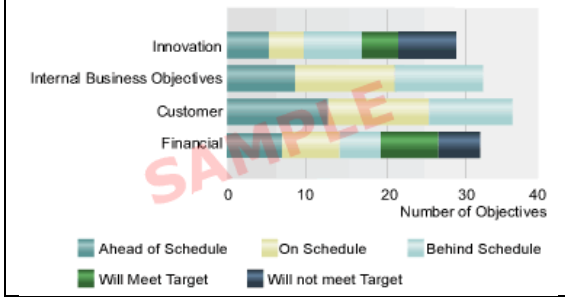
- At least one category must be defined in your goal template for data to appear.
- Goals without category appear with an empty label.
- Categories are combined from all selected templates. If the same category appear in several templates goals will be combined into one entry in the chart.
- Color for the categories come from the theme manager.
- Deleted goals are not included.

Reporting Schemas Required:

- Goal Management

Dashboard 1.0 equivalent portlet

Objective Status

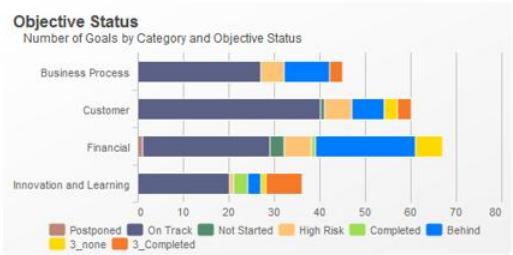


Main difference:

Old Portlet	New Tile
Objectives are grouped by category and status	Objectives are just grouped by status

Equivalent chart in standard dashboard

Objective Status



Main difference:

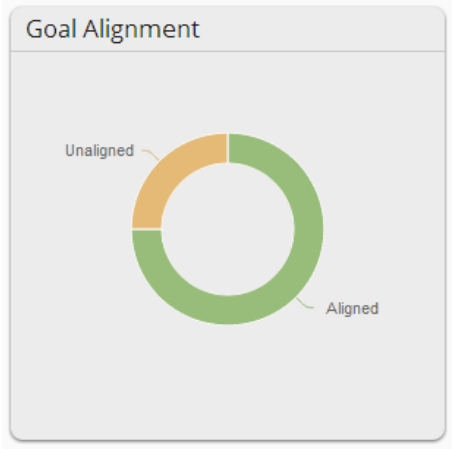
Old Chart in Standard Dashboard	New Tile
Shown as bar chart.	Shown as column chart.

The chart comes as part of the following dashboard:

- Objective Dashboard

Charts from standard dashboards only works in the context of that dashboard. They cannot be used as a separate tile to mix with other charts. Recommendation is to use the tile – not the standard dashboard. Read more here.

Objective Alignment

Screenshot:	Usage:	Data:
	See how many of the goals in your team are aligned to goals higher up the org hierarchy. Columns in Detail View: Objective ID Commitment Status Complete Category Start Date Due Date Owner username Owner First Name Owner Last Name	Count number of goals by “aligned up”. A goal is either aligned or not aligned. You should know… • Goals linked to co-workers goals might appear as unaligned if they are not aligned to a higher goal (“aligned up”). • Deleted goals are not included. Reporting Schemas Required: • Goal Management

Dashboard 1.0 equivalent porlet

Aligned Objectives

Main difference:

Old Portlet	New Tile
Compares this period with previous period	No comparison to last period.
Shown as a bar chart	Shown as a pie chart

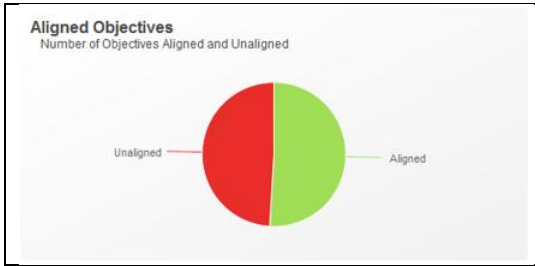
Equivalent chart in standard dashboard

Objective Status

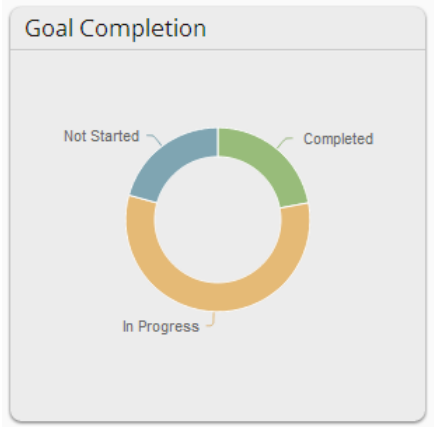
Main difference:

Old Chart in Standard Dashboard	New Tile
No differences…	No differences…

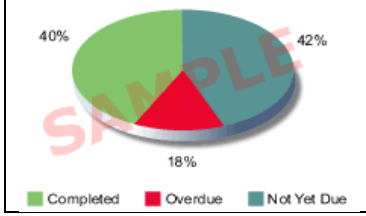
The chart comes as part of the following dashboard:
- Objective Dashboard

	Charts from standard dashboards only works in the context of that dashboard. They cannot be used as a separate tile to mix with other charts. Recommendation is to use the tile – not the standard dashboard. Read more here.

Objective Completion

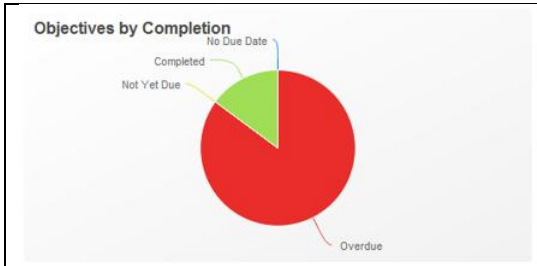
Screenshot:	Usage:	Data:
	See how many of the goals in your team are completed, in progress or not started. Columns in Details View: Commitment Complete Due Date Owner username Owner First Name Owner Last Name Goal ID	Count number of goals by the value in the "% complete" column. • 100% is categorized as "Completed" • 0% is categorized as "Not Started" • All other goals are categorized as "In Progress". You should know… • This tile does not consider values in the dropdown field status. This is the dropdown box users can set with labels such as Complete, In Progress, Behind Target etc. Often users mistakenly believe because the label says 'Completed' that the goal will not show as overdue etc. • Deleted goals are not included. Reporting Schemas Required: • Goal Management

Dashboard 1.0 equivalent portlet

Objectives by Completion	Main difference:	
	**Old Portlet**	**New Tile**
	Combine "done" and "due date" to group goals into completed / not yet due /overdue	Look only at "done" to group into completed / in progress / not started.

Equivalent chart in standard dashboard

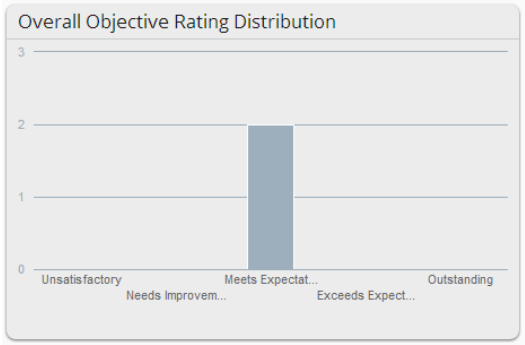
Objective Status	Main difference:	
	Old Chart in Standard Dashboard	**New Tile**
	Combine "done" and "due date" to group goals into completed / not yet due / overdue / no due date.	Look only at "done" to group into completed / in progress / not started.
	The chart comes as part of the following dashboard:	



- Objective Dashboard

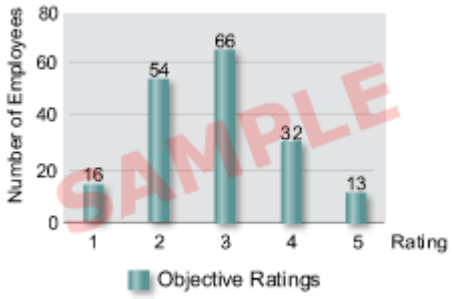
Charts from standard dashboards only works in the context of that dashboard. They cannot be used as a separate tile to mix with other charts. Recommendation is to use the tile – not the standard dashboard. Read more here.

Overall Objective Rating Distribution

Screenshot:	Usage:	Data:
	See if the distribution of objective ratings for the selected people match the desired distribution. Columns in Details View: Document ID Form Title Overall Objective Rating Subject Username Subject First Name Subject Last Name	This tile is based on data from performance form. It counts number of performance forms by overall objective rating label (the overall rating for the objective section in the form). The x-axis displays labels defined in the rating scale used to give the ratings. You should know… • Forms must have an overall objective rating label to be shown in the chart. If there is no objective summary section in the form it will not have the data needed for the chart. • The rating must have a rating scale ID to appear in the chart. • If the labels in the rating scale has been changed since the form was saved, the form will not appear in the chart. • The rating scale must have a value in the user's language. • Unrated forms will not appear. • If multiple rating scales are in use the chart could look a bit strange. See special section about "Rating scale charts" for further details. • If forms have multiple owners they will appear several times in the list view. Reporting Schemas Required: • Performance Management • Rating Scales

Dashboard 1.0 equivalent portlet

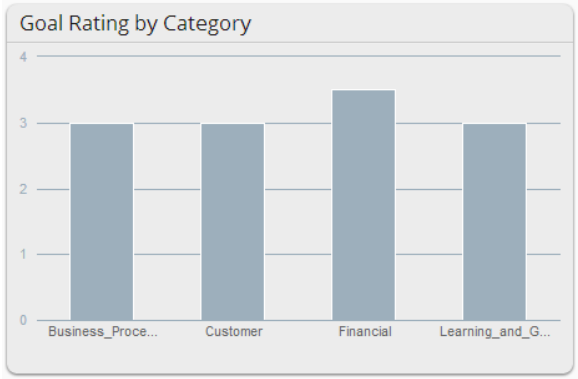
Overall Objective Rating Distribution



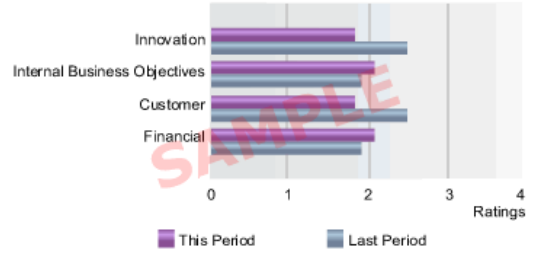
Main difference:

Old Portlet	New Tile
Shows numbers on the x-axis	Shows the rating labels on the x-axis
Calculated by converting number rating to a number on the scale. Rounding rules is set in the dashboard configuration. This can cause some confusion if a rating is set using one scale but then displayed on another scale.	Shows the rating labels as it is shown on the form. There is no re-calculation of the rating so it will always match the rating label on the form.
Works for all forms with a number rating.	Form must have rating label and rating scale ID.

Objective Rating by Category

Screenshot:	Usage:	Data:
	The average objective rating can be used to compare ratings across categories. Columns in Detail View: Goal Name Goal Category Goal Official Rating Username First Name Last Name Form ID	This tile is based on data from performance form. It takes an average by category of the objective official rating for each goal in the form. You should know… • Goals must have a "Goal Official Rating" to be shown in the chart. • If ratings are set on different rating scales (with different min and max values), the chart could be misleading. Recommendation is not to mix forms with different rating scales. • Unrated goals will not appear. • Each goal count with equal weight in the calculation. If one person has four goals in the same category this will be the same as four people each having one goal in the category. Reporting Schemas Required: • Performance Management

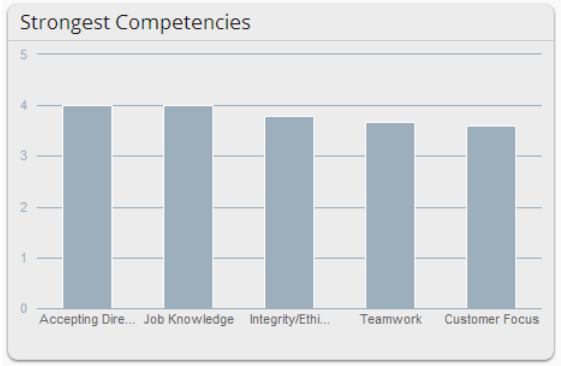
Dashboard 1.0 equivalent portlet

Average Objective Ratings by Category	Main difference:
	**Old Portlet** / **New Tile** Shows current period and last period / Only show one period.

Competency Tiles

Strongest Competencies

Screenshot:



Usage:

See the highest rated competencies in your team. This might be a strength, which you can leverage.

Columns in Details View:

- Competency Name
- Competency Official Rating
- Subject First Name
- Subject Last Name
- Subject Username

Data:

This tile is based on data from performance forms. It takes an average of the competency rating by category and sort highest to lowest.

You should know…

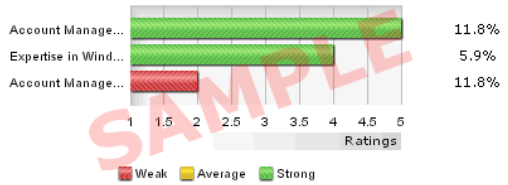
- The tile will show the top five competencies.
- The chart on the detailed list will show all competencies.
- Unrated competencies/behaviors will not appear.
- Ratings made on different rating scales (different min and max values) could lead to a misleading chart. Recommendation is to not report across forms using different rating scales.

Reporting Schemas Required:

- Performance Management

Dashboard 1.0 equivalent portlet

Competency Strengths / Behavior Strengths



Main difference:

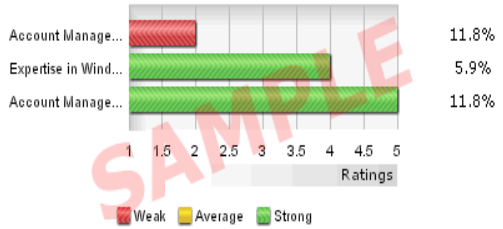
Old Portlet	New Tile
Color the bars green/yellow/red	All bars have the same color
Shows frequency (how often a competency has been rated)	Does not show frequency. Only the average rating is shown.
Show only top 5 competencies	Show all competencies (in detail view)

Weakest Competencies

Screenshot:	Usage:	Data:
	See the lowest rated competencies in your team. This might be an area of improvement. Columns in Details View: Competency Name Competency Official Rating Subject First Name Subject Last Name Subject Username	This tile is based on data from performance forms. It takes an average of the competency rating by category and sort lowest to highest. You should know… • The tile will show the bottom five competencies. • The chart on the detailed list will show all competencies. • Unrated competencies/behaviors will not appear. • Ratings made on different rating scales (different min and max values) could lead to a misleading chart. Recommendation is to not report across forms using different rating scales. Reporting Schemas Required: • Performance Management

Dashboard 1.0 equivalent portlet

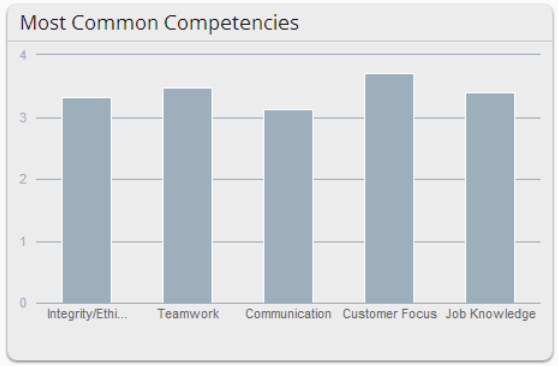
Competency Weaknesses / Behavior Weaknesses



Main difference:

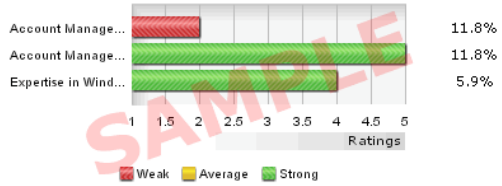
Old Portlet	New Tile
Color the bars green/yellow/red	All bars have the same color
Shows frequency (how often a competency has been rated)	Does not show frequency. Only the average rating is shown.
Show only top 5 competencies	Show all competencies (in detail view)

Most Common Competencies

Screenshot:	Usage:	Data:
	See the most common competencies. These are often the once that are critical to the work in your area so the ratings for these needs competencies are critical to your business. Columns in Details View: Competency Name Competency Official Rating Subject First Name Subject Last Name Subject Username	This tile is based on data from performance forms. It shows average rating by category. The categories are sorted by the number of times the competency has been rated. You should know… • The tile will show the top 5 competencies. • The chart on the detailed list will show all competencies/behaviors. • Unrated competencies will not appear. • Ratings made on different rating scales (different min and max values) could lead to a misleading chart. Recommendation is to not report across forms using different rating scales. Reporting Schemas Required: • Performance Management

Dashboard 1.0 equivalent portlet

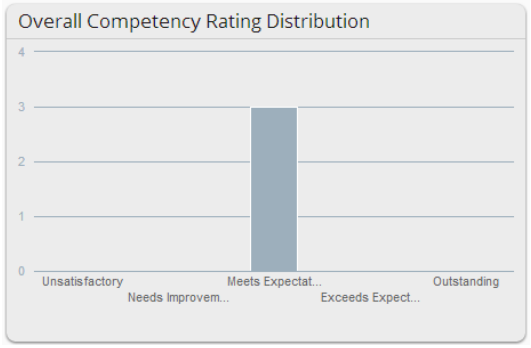
Most Common Competency /
Most Common Behaviors



Main difference:

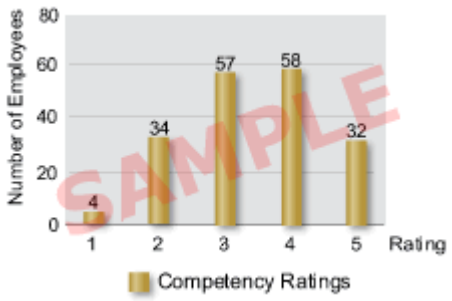
Old Portlet	New Tile
Color the bars green/yellow/red	All bars have the same color
Shows frequency (how often a competency has been rated)	Does not show frequency. Only the average rating is shown.
Show only top 5 competencies	Show all competencies(in detail view)

Overall Competency Rating Distribution

Screenshot:	Usage:	Data:
	See if the distribution of competency ratings for the selected people match the desired distribution. Columns in Details View: Competency Name Competency Official Rating Subject First Name Subject Last Name Subject Username	This tile is based on data from performance form. It counts number of performance forms by overall competency rating label (the overall rating for the competency section in the form). The x-axis displays labels defined in the rating scale used to give the ratings. You should know… • Forms must have an overall competency rating label to be shown in the chart. If there is no competency summary section in the form it will have no data for the chart. • The rating must have a rating scale ID to appear in the chart. • If the labels in the rating scale has been changed since the form was saved, the form will not appear in the chart. • The rating scale must have a value in the user's language. • Unrated forms will not appear. • If multiple rating scales are in use, the chart could look a bit strange. See special section about "Rating scale charts" for further details. • If forms have multiple competency sections, they will appear several times in the chart. Reporting Schemas Required: • Performance Management • Rating Scales

Dashboard 1.0 equivalent portlet

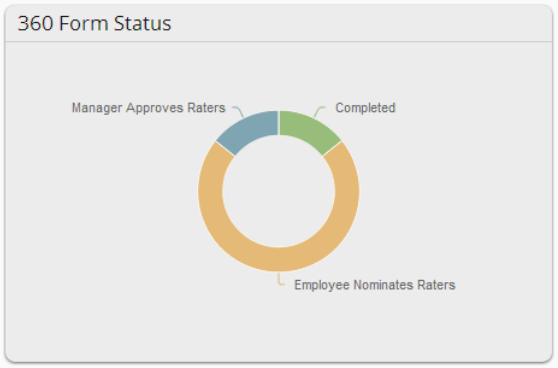
	Main difference:	
Overall Competency Rating Distribution	**Old Portlet**	**New Tile**
	Shows numbers on the x-axis	Shows the rating labels on the x-axis
	Calculated by converting number rating to a number on the scale. Rounding rules is set in the dashboard configuration. This can cause some confusion if a rating is set using one scale but then displayed on another scale.	Shows the rating labels as it is shown on the form. There is no re-calculation of the rating so it will always match the rating label on the form.
	Works for all forms with a number rating.	Form must have rating label and rating scale


Number of Employees
80
60
40
20
0
4
34
57
58
32
1
2
3
4
5
Rating
Competency Ratings
SAMPLE

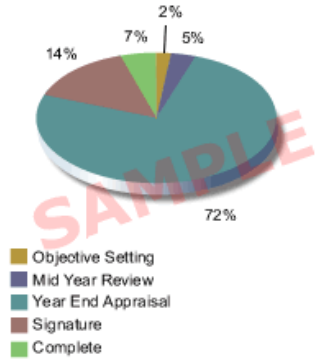
	ID.

360 Multi Rater

360 Form Status

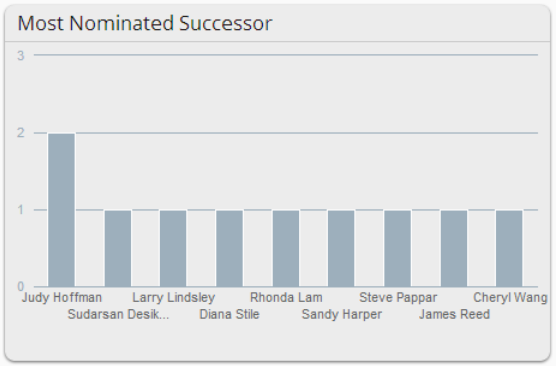
Screenshot:	Usage:	Data:
	Use this tile during 360 review cycle to monitor progress of the forms. Columns in Detail View: Document ID Route Map Step Name Status Owner Username Owner First Name Owner Last Name Form Start Date Form End Date Form Due Date	Show the route map step name of performance forms that are in progress. Forms that are completed shows the status text. You should know… • If there are multiple route maps used you will see all steps from all route maps. If the step names are identical, they will be combined. • If route map has had steps renamed, you may see more steps than currently in route map. For example if some forms had a step called Goal Setting, then the route map was renamed Objective Setting for new forms, the pie chart will show a slice for each name. Reporting Schemas Required: • 360 Multi-Rater Subject

Dashboard 1.0 equivalent portlet

Form Status Grouped by Workflow	Main difference:
	**Old Portlet** / **New Tile** Shows a new chart for each route map → Combine all route maps into one chart Shows all form types in one chart → Shows only 360 forms (there is an identical tile for other types of forms). Has additional information about employee count in the top of the portlet → There is no additional information.

Succession

Most Nominated Successor

Screenshot:	Usage:	Data:
	See who is nominated most times for positions in your team. Columns in Detail View: Position ID Position Title Nominee Username Nominee First Name Nominee Last Name	Shows count of nominations by nominee for the positions in selected people scope. To clarify further: If you select “team view, direct reports” you will see all people that are nominated for the positions your direct reports currently hold. You will not see which positions your direct reports are nominated for. Thus, if Richard Maxx is your direct report and he has 5 nominations outside your team, he won’t show up on this chart. Data is grouped by nominee so you can see how many times each person is nominated for roles in your team. Nominations must have nominations status “approved” to appear in the chart. Reporting Schemas Required: This tile exist for two different implementations of Succession • Position-based/legacy Succession version): ○ Succession By Position (Inclusive of unnominated positions) ○ Rating Scales • Position-based nominations with MDF (but without EC): ○ Inclusive Succession (MDF Position based nominations) ○ Rating Scales • Position-based nominations with MDF (with EC) ○ Inclusive Succession (MDF Position based nominations, with Employee Central ○ Rating Scales

Positions by Max Successor Readiness

Screenshot:

Usage:

See how ready the most ready successor is for each position in the team. Use this to manage risk related to lack of ready successors for positions.

Columns in Detail View:

Position Code
Position Title
Position Criticality
Incumbent User ID
Incumbent First Name
Incumbent Last Name
Incumbent Title
Nomination Date
Nominee User ID
Nominee First Name
Nominee Last Name
Nomination Readiness

Data:

Show count of positions by maximum successor readiness. Each position only appear in this chart once and show the nomination with the highest readiness. Nominations must have nominations status "approved" to appear in the chart. Positions without any successors nominated will not appear in the chart.

You should know…

- The same person might be nominated for several positions in your team. So even though this chart might show that you have successors ready for all your positions, it might be the same person appearing multiple times.
  There is a separate chart called "Most Nominated Successor" to track how many times each a person is nominated for positions in your team.

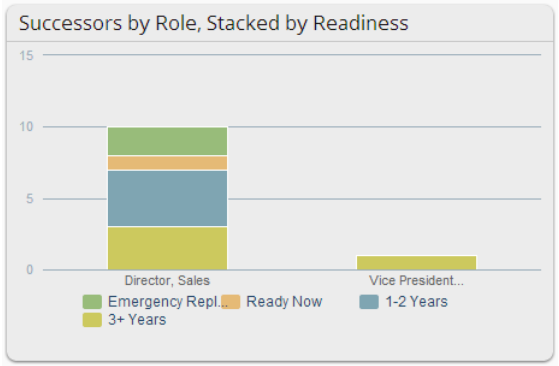
Reporting Schemas Required:

This tile exist for two different implementations of Succession

- Position-based/legacy Succession version):
  - Succession By Position (Inclusive of unnominated positions)
  - Rating Scales
- Position-based nominations with MDF (but without EC):
  - Inclusive Succession (MDF Position based nominations)
  - Rating Scales
- Position-based nominations with MDF (with EC)
  - Inclusive Succession (MDF Position based nominations) with Employee Central
  - Rating Scales

Successors by Role, Stacked by Readiness

Screenshot:



Usage:

See how many successors you have for each role and how ready the successors are.

Use this to manage risk for critical positions.

Columns in Detail View:

Position Code
Position Title
Position Criticality
Incumbent User ID
Incumbent First Name
Incumbent Last Name
Incumbent Title
Nomination Date
Nominee User ID
Nominee First Name
Nominee Last Name
Nomination Readiness

Data:

Show count of successors stacked by incumbent' role and stacked by readiness. If you have multiple positions with the same role, they will appear as one category in the x-axis of the chart. The underlying assumption is that successors can take over identical positions. Positions without successors nominated will not appear in this chart. Nominations must have nominations status "approved" to appear in the chart.

You should know…

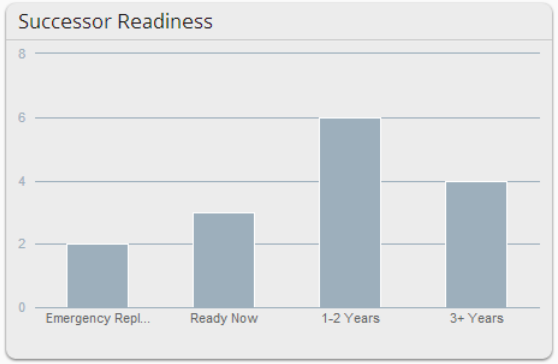
- The same person might be nominated for several positions in your team and every nomination is counted in this chart. So even though this chart might show that you have successors ready for all your positions, it might be the same person appearing multiple times.
  There is a separate chart called "Most Nominated Successor" to track how many times each a person is nominated for positions in your team.

Reporting Schemas Required:

This tile exist for two different implementations of Succession

- Position-based/legacy Succession version):
  - Succession By Position (Inclusive of unnominated positions)
  - Rating Scales
- Position-based nominations with MDF (but without EC):
  - Inclusive Succession (MDF Position based nominations)
  - Rating Scales
- Position-based nominations with MDF (with EC)
  - Inclusive Succession (MDF Position based nominations) with Employee Central
  - Rating Scales

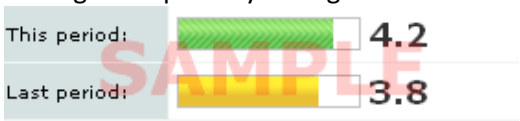
Successor Readiness

Screenshot:	Usage:	Data:
	See all nominations by readiness rating to see all the people nominated for positions in your team. This gives you a high-level overview of the readiness of people nominated for positions in your team. Columns in Detail View: Position Code Position Title Position Criticality Incumbent User ID Incumbent First Name Incumbent Last Name Incumbent Title Nomination Date Nominee User ID Nominee First Name Nominee Last Name Nomination Readiness	Show count of nominations by readiness. Nominations must have nominations status “approved” to appear in the chart. Every nomination is counted, so the same person might appear multiple times if they are nominated for multiple positions. To further clarify: This chart does not show you the distribution of readiness of your team members. Rather, this chart shows you the distribution of readiness among successors nominated to positions within your team. Thus, if Richard Maxx is your direct report, and he is nominated to a position outside of your team, this nomination is not included in this chart. This chart helps you manage succession risk within your team You should know… • The same person might be nominated for several positions in your team. Each nomination count in this chart. So even though this chart might show that you have successors ready for all your positions, it might be the same person appearing multiple times. There is a separate chart called “Most Nominated Successor” to track how many times each a person is nominated for positions in your team. Reporting Schemas Required: This tile exist for two different implementations of Succession • Position-based/legacy Succession version): ○ Succession By Position (Inclusive of unnominated positions) ○ Rating Scales • Position-based nominations with MDF (but without EC): ○ Inclusive Succession (MDF Position based nominations) ○ Rating Scales • Position-based nominations with MDF (with EC) ○ Inclusive Succession (MDF Position based nominations) with

		Employee Central ○ Rating Scales

Dashboard 1.0 portlets that will not be converted

Performance Management

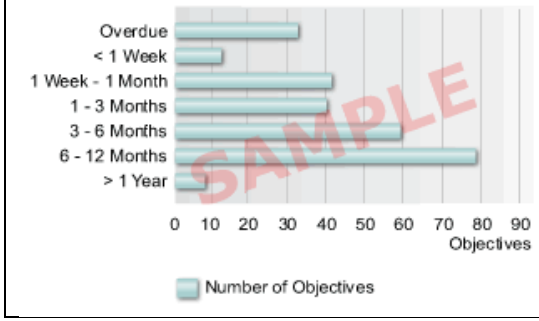
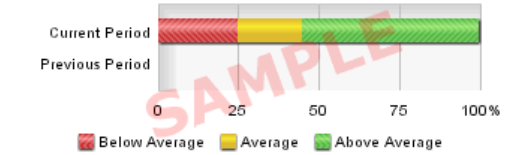
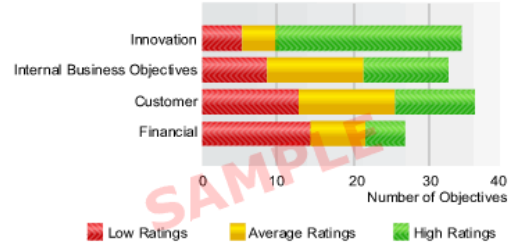
Average Competency Rating	Average Overall Rating	Average Objective Rating
		

Dashboards 2.0 does not have the concept of “this period” and “last period” so there is little value in these portlets.

It is possible to create your own tiles showing average rating across a dimension (for example average rating per division/department/location). Use the tile builder to create such tiles.

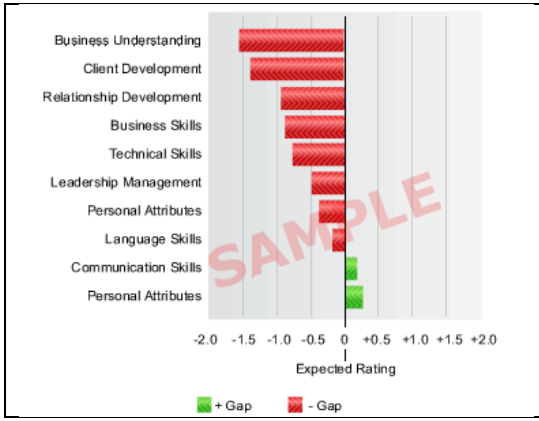
If you want the average rating for all forms simply choose a dimension that is the same for all employees (for example “Active/deleted”… assuming you filter out deleted forms then all forms will have status “active” and the chart will return just one column with the average across all forms).

Goal Management

Objective Due Range	Overall Objective Status	Objective Ratings
		

Competencies

Competency Gaps		



Talent 9-Boxes

Competency / Objective Matrix

OBJECTIVE						
	5	18 7%	12 5%	4 2%	7 4%	6 3%
	4	18 7%	12 5%	4 2%	7 4%	6 3%
	3	18 7%	12 5%	4 2%	7 4%	6 3%
	2	18 7%	12 5%	4 2%	7 4%	6 3%
	1	18 7%	12 5%	4 2%	7 4%	6 3%
		1	2	3	4	5
		COMPETENCY				

SAMPLE

Performance / Potential Matrix

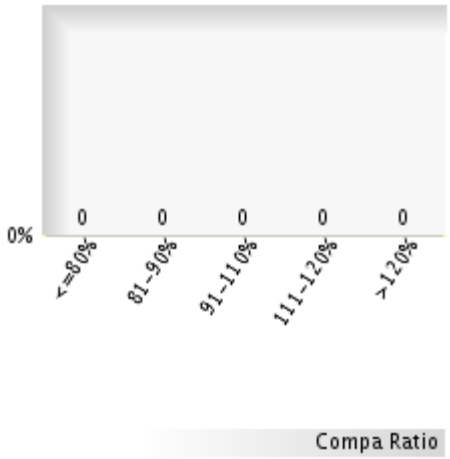
POTENTIAL						
	5	10 4%	10 3%	4 2%	7 4%	6 3%
	4	22 11%	12 5%	4 2%	7 4%	6 3%
	3	18 7%	12 5%	8 4%	7 4%	6 3%
	2	18 7%	12 5%	4 2%	4 2%	6 3%
	1	18 7%	19 7%	4 2%	7 4%	6 3%
		1	2	3	4	5
		PERFORMANCE				

SAMPLE

These portlets exist as Matrix Grid Reports in a separate subtabs.

Compensation

Compa-Ratio Distribution



Pay / Performance Matrix

PAY		PERFORMANCE				
	> 120%	18	1	4	2	6
	110% - 120%	11	19	3	5	15
	90% - 110%	18	12	4	7	6
	80% - 90%	6	8	2	3	3
	< 80%	4	12	7	7	1
		1	2	3	4	5

SAMPLE

Trouble shooting

The dashboard framework displays data as it exist in the AdHoc reports. If data is missing in the adhoc report it will also be missing in the dashboard. If you want to validate the data for a particular tile, then look in the data description for the chart and run an adhoc report to validate data in further details.

Common Problems…

There is no data in the chart

There can be a number of reasons for this. Most typically:

- Filters are set in a way so no data is returned. For example, you might have selected a form template that have not been used for the selected people. Try selecting different template(s).
- Data Requirements not met. Look in the description for each tile to see data requirements. If for example a chart group forms by overall objective rating and category, you must have both fields configured in your forms. And if a chart show values on a rating scale, then all ratings must have a rating scale id.

People appear multiple times in the chart.

This is most likely because they have multiple forms. You have either selected templates for multiple years and therefore receive data for the same users several times. Or you have reused the same form template several years so user does in fact have multiple forms using the same template.

In some cases the same user might simply have several goals/compatencies/behaviours/nominations in the same category.

People appear twice in the list

This is most likely because you have included a column with has multiple values per form. For example, a form might have multiple owners or a step might have multiple substeps. Due to the way data is joined it can cause the list to contain duplicate rows – especially if you query a lot of columns in the list view.

Special Note about Rating Distribution Tiles

This note is amore detailed description of the data requirements for the following tiles:

- Overall Rating Distribution
- Overall Objective Rating Distribution
- Overall Competency Rating Distribution

Data Requirements

Rating distribution tiles all use the “rating description” (the rating label – not the number) and count forms with each rating.

- If a form does not have a rating description, it will not appear in the chart.

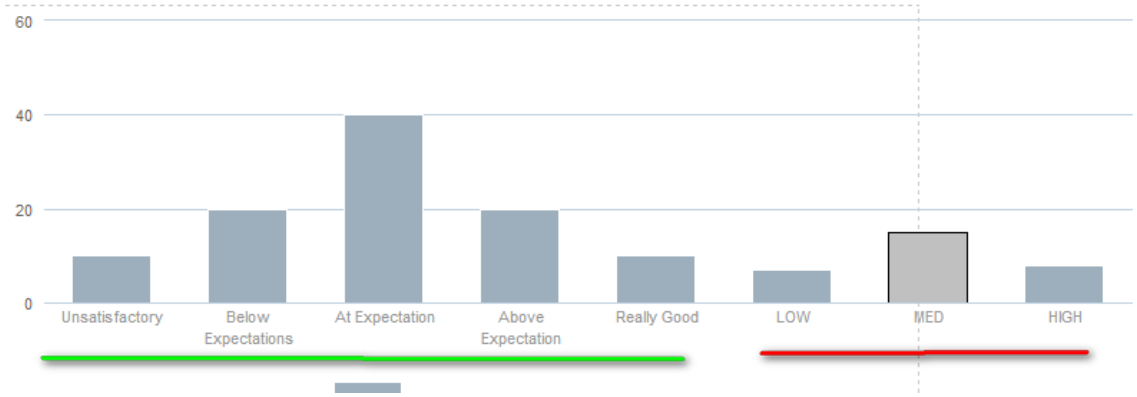
Ratings are displayed using the same rating scale that has been used to give the ratings. We need to know the rating scale to show the ratings in the right order and to show ratings without any forms in.

- If there are no rating scale ID on a rating it will not be shown in the chart.

We will only display forms with values that map to one of the labels in the rating scale.

- Ratings like “unrated” and too new to rate” will not be displayed as they are not items on the rating scale.

These tiles only work if the rating scale has values in the user’s language. Please verify in the rating scales admin tool that you have labels in all enabled languages. You can choose to copy the English label into the local language, but you cannot leave it blank.

If forms use different rating scales…

We recommend not to report across multiple rating scales. If a user anyway combine the several scales, then values from all the scales will appear one scale at a time. See example below where the green section is the first rating scale and the red section is the second rating scale. Both scales are shown in the same chart.