Infor HR Talent Reports User Guide

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Contacting Infor

If you have questions about Infor products, go to Infor Concierge at https://concierge.infor.com/ and create a support incident.

The latest documentation is available from docs.infor.com or from the Infor Support Portal. To access documentation on the Infor Support Portal, select **Search > Browse Documentation**. We recommend that you check this portal periodically for updated documentation.

If you have comments about Infor documentation, contact documentation@infor.com.

Chapter 1: Reporting overview

HR Talent includes reporting tools that can be used to make decisions and improve business processes. Reports can be used to expose potential trends, analyze the effects of decisions and events, or evaluate business performance. Operational reports contain real-time information in tabular form that can be filtered, sorted, and rearranged.

Infor HR Talent reporting capabilities

Every list in Infor HR Talent can be turned into a report.

Select **More Actions > Options** to access these reporting tools:

- Select **Personalize > Create** to change a list for yourself.
- To create a report from the original list or a customized list, you can export the report to a PDF file or to a CSV file.

  Select **Print To PDF** to print the primary list and the details.

  - On a tree view, you can export these levels of detail to a PDF file:
    - Root Level Only
    - Root Level Only With Details
    - All Levels
    - All Levels With Details
    - Selected Record With Details
  - For multiple-panel lists, you can export these levels of detail to a PDF file:
    - Current List Only
    - Current List With Details
    - Selected Record With Details
  - To access the PDF files that you generated, click **Print Files**.
- Select **Export To CSV** to export an original or modified list to a CSV file. You can modify the CSV file to produce an Excel report.
- Select **Create Report** to create a report by filtering the list from which you start. You can view the report that you create for a list by selecting **Options > Related Reports**.

Personalizing and saving list definitions

HR Talent provides report templates that you can modify for your own needs using the Personalize feature.

You can customize any list by using the Personalize feature and saving the modified definition to a folder to create your own reports.

1. Access the list to modify.
2. Select **More Actions > Options > Personalize > Create**.
3. On the List Editor form, specify this information:
   - To create your own criteria for the data in the list, on the **Filter** tab, click **Builder** to define the conditions.
   - To specify a default sort column, on the **Column** tab, select the column. Click **Sorting and Totaling** and select the **Default Sort**check box.
   - To change the position of a field, highlight the field, and drag the field to the position.
   - To add a field, click **Advanced Search** and browse to the field.
   - To edit a field, highlight the field. You can specify a label, select a sort order, select a totaling option, and select the **Updateable** check box.

   Note: You cannot select a sort order or select the **Updateable** check box if you select the `Running Total` or `Percent Of Total` option.
4. When your modifications are complete, click **Ok**.
5. To return the original list to the system-delivered settings, select **Options > Personalize**, click **Reset**, and click **Ok**.

Chapter 2: Compensation standard reports and lists

Compensation information for reporting is located throughout the navigation menus. In addition, you can create a report from any list.

This table contains the standard reports and lists for compensation. To find these items, navigate to the report using the menu or search for the report using the report name. If another name is specified in the Role and navigation column, then search for the menu name.

Report name	Description	Role and navigation
Aggregate Salary Survey Export Template	Export the average salary information in a format where you can submit it to a survey provider.	Administrator, Compensation Administrator, and Generalist: **Compensation > Reports > Market Survey Reports > Aggregate Export Template**
Anniversary Awarding	View awards that are based on an anniversary date.	Administrator, Compensation Administrator, and Generalist: **Compensation > Awarding > Awarding Process > Anniversary Awarding**
Awarding Audit Report	Find employee records for awards.	Administrator, Compensation Administrator, and Generalist: **Compensation > Awarding > Awarding Process > Awarding Audit Report**
Awarding Summary	Access your managers' compensation awarding records and your compensation awarding records by awarding view and awarding status.	Manager: **Adjust Compensation > Awarding Summary**
Awarding Views	View resource budgets. Create resource budgets manually if the Calculate Budget action was not processed correctly.	Administrator, Compensation Administrator, and Generalist: **Compensation > Awarding > Budget Process > Resource Budgets**

Report name	Description	Role and navigation
Awarding Views	Manage roll up approval views.	Administrator, Compensation Administrator, and Generalist: **Compensation > Awarding > Awarding Process > Roll Up Approval Views**
Bonus Objective Periods	Create bonus objective goals on behalf of resources or resource managers. You can also view pending bonus objectives, historical bonus objectives, and bonus objectives with errors.	Administrator, Compensation Administrator, and Generalist: **Compensation > Incentive Compensation > Bonus Objectives > Bonus Objective Periods**
Bonus Objectives	View and define goals that are attached to bonus objectives.	Manager: **Adjust Compensation > Bonus Objectives**
Bonus Payouts	View bonus payouts that are pending, submitted, or finalized.	Administrator, Compensation Administrator, and Generalist: **Compensation > Awarding > Awards > Bonus Payouts**
Budget Analysis	View grand totals of the budget amounts, budget spent, budget balance, current and new salaries, salary increases, and other awards.	Administrator, Compensation Administrator, and Generalist: **Compensation > Awarding > Budget Process > Budget Analysis**
Budget Analysis Report	View budgets and awards by supervisor structure.	Administrator, Compensation Administrator, and Generalist: **Compensation > Awarding > Budget Process > Manager Budget Analysis Reports** Manager: **Adjust Compensation > Budget Analysis**
Calculate Payouts	Calculate payouts by pay component, compensation program, compensation period, or resource. You can also view payout errors.	Administrator, Compensation Administrator, and Generalist: **Compensation > Incentive Compensation > Payouts > Calculate Payouts**
Compensation Analysis	View the compensation information for a resource.	Administrator, Compensation Administrator, and Generalist: **Compensation > Resource Analysis > Compensation Analysis** Manager: **Adjust Compensation > Compensation Analysis**

Report name	Description	Role and navigation
Compensation Analysis By Manager	View active work assignments by manager, with a yellow alert for resources that are outside of their salary structure range.	Administrator, Compensation Administrator, and Generalist: **Compensation > Reports > Analysis Templates > Manager**
Compensation Analysis By Organization Unit	View active work assignments by organization unit, with a yellow alert for resources that are outside of their salary structure range.	Administrator, Compensation Administrator, and Generalist: **Compensation > Reports > Analysis Templates > Organization Unit**
Compensation Analysis By Salary Structure	View current salary structures, grades, and geographic differentials.	Administrator, Compensation Administrator, and Generalist: **Compensation > Reports > Analysis Templates > Salary Structure**
Compensation Awarding	View a table of compensation awards for staff.	Manager: **Adjust Compensation > Compensation Awarding**
Critical Position Reasons	View and create position components for critical position reasons.	Administrator, Compensation Administrator, and Generalist: **Compensation > Jobs And Positions > Position Components > Critical Position Reasons**
Enrollment Updates	View compensation program enrollments that have errors, are ready to process, or have been processed.	Administrator, Compensation Administrator, and Generalist: **Compensation > Incentive Compensation > Enrollment > Enrollment Updates**
Equity Grants	View equity grants that are pending, submitted, or finalized.	Administrator, Compensation Administrator, and Generalist: **Compensation > Awarding > Awards > Equity Grants**
Focal Period Awarding	View awards where the awarding period is the same for all resources.	Administrator, Compensation Administrator, and Generalist: **Compensation > Awarding > Awarding Process > Focal Period Awarding**
Frozen Position Reasons	View and create position components for frozen position reasons.	Administrator, Compensation Administrator, and Generalist: **Compensation > Jobs And Positions > Position Components > Frozen Position Reasons**
Incumbent Salary Survey Export Template	View, filter, and export the incumbent salary information in a format that you can submit to a survey provider.	Administrator, Compensation Administrator, and Generalist: **Compensation > Reports > Market Survey Reports > Incumbent Export Template**

Report name	Description	Role and navigation
Job Category Setup	View and create job components for job categories.	Administrator, Compensation Administrator, and Generalist: **Compensation > Jobs And Positions > Job Components > Categories**
Job Country Attribute Categories	View and create job components for country attributes.	Administrator, Compensation Administrator, and Generalist: **Compensation > Jobs And Positions > Job Components > Country Attributes**
Job Families	View and create job components for job families.	Administrator, Compensation Administrator, and Generalist: **Compensation > Jobs And Positions > Job Components > Families**
Job Field Default Rules	View and update default rules for job fields.	Administrator, Compensation Administrator, and Generalist: **Compensation > Jobs And Positions > Job And Position Default Rules > Job Field Default Rules**
Job Levels	View and create job components for job levels.	Administrator, Compensation Administrator, and Generalist: **Compensation > Jobs And Positions > Job Components > Levels**
Jobs	View, create, and maintain jobs.	Administrator, Compensation Administrator, and Generalist: **Compensation > Jobs And Positions > Jobs**
Key Position Reasons	View and create position components for key position reasons.	Administrator, Compensation Administrator, and Generalist: **Compensation > Jobs And Positions > Position Components > Key Position Reasons**
Lump Sum Payouts	View lump sum payouts that are pending, submitted, or finalized.	Administrator, Compensation Administrator, and Generalist: **Compensation > Awarding > Awards > Lump Sum Payouts**
Maintain Payouts	View incentive compensation payouts that are pending, finalized or submitted. You can also view submitted bonus awards and bonus award errors.	Administrator, Compensation Administrator, and Generalist: **Compensation > Incentive Compensation > Payouts > Maintain Payouts**

Report name	Description	Role and navigation
Maintain Allowances Payouts	View pending, finalized, and submitted payout records.	Administrator, Compensation Administrator, and Generalist: **Compensation > Pay Rate Processing > Allowances > Maintain Payouts**
Maintain Pending Changes Mass Pay Rate	Make mass pay rate changes to work assignments and view errors.	Administrator, Compensation Administrator, and Generalist: **Compensation > Pay Rate Processing > Mass Pay Rate > Maintain Pending Changes**
Manager Awarding Views	Create or reverse compensation awards and manage historical awarding views.	Administrator, Compensation Administrator, and Generalist: **Compensation > Awarding > Awarding Process > Manager Awarding Views**
Manager Budgets and Awards	View budget balances for a budget owner, finalize budgets, and release budgets to other managers.	Administrator, Compensation Administrator, and Generalist: **Compensation > Awarding > Budget Process > Manager Budgets and Awards**
Market Survey Reporting	Create aggregate and incumbent reports to export to a survey provider for analysis.	Administrator, Compensation Administrator, and Generalist: **Compensation > Reports > Market Survey Reports > Market Salary Survey Reporting**
Pay Rate Changes	View pay rate changes that are pending or processed. You can also view errors for pay rate changes.	Administrator, Compensation Administrator, and Generalist: **Compensation > Awarding > Awards > Pay Rate Changes**
Position Category Setup	View and create position categories for job families.	Administrator, Compensation Administrator, and Generalist: **Compensation > Jobs And Positions > Position Components > Categories**
Position Families	View and create position components for job families.	Administrator, Compensation Administrator, and Generalist: **Compensation > Jobs And Positions > Position Components > Families**
Position Field Default Rules	View and update default rules for position fields.	Administrator, Compensation Administrator, and Generalist: **Compensation > Jobs And Positions > Job And Position Default Rules > Position Field Default Rules**

Report name	Description	Role and navigation
Position Levels	View and create position components for job levels.	Administrator, Compensation Administrator, and Generalist: **Compensation > Jobs And Positions > Position Components > Levels**
Positions	View, create, and maintain positions.	Administrator, Compensation Administrator, and Generalist: **Compensation > Jobs And Positions > Positions**
Program Metrics	Define external metrics for a compensation program.	Administrator, Compensation Administrator, and Generalist: **Compensation > Incentive Compensation > External Metrics > Program Metrics**
Rate Progression Hours	View rate progression hours.	Administrator, Compensation Administrator, and Generalist: **Compensation > Pay Rate Processing > Rate Progression > Rate Progression Hours**
Resource Enrollment	View and create enrollments for compensation programs. Enrollments can be created for employees or enrollment groups.	Administrator, Compensation Administrator, and Generalist: **Compensation > Incentive Compensation > Enrollment > Resource Enrollment**
Resource Metrics	Define external metrics for an individual resource.	Administrator, Compensation Administrator, and Generalist: **Compensation > Incentive Compensation > External Metrics > Resource Metrics**
Resource Rate Progression Lump Sum Payouts	View pending, finalized, and submitted lump sum payouts.	Administrator, Compensation Administrator, and Generalist: **Compensation > Pay Rate Processing > Rate Progression > Lump Sum Payouts**
Resource Search	Add external candidates to the system and search for work assignments.	Administrator, Compensation Administrator, and Generalist: **Compensation > Resource Analysis > Resources**
Resources Enrolled	View compensation program enrollments that are in Pending, Manager Review, or Finalized status.	Administrator, Compensation Administrator, and Generalist: **Compensation > Incentive Compensation > Enrollment > Resources Enrolled**

Report name	Description	Role and navigation
Responsibilities	View and create job components for responsibilities and responsibility groups.	Administrator, Compensation Administrator, and Generalist: **Compensation > Jobs And Positions > Job Components > Responsibilities**
Special Incentives	View special incentive requests that have been approved or are awaiting approval.	Administrator, Compensation Administrator, and Generalist: **Compensation > Incentive Compensation > Payouts > Special Incentives**
Step And Grade Schedules With Rate Progression	View pay rates for resources who are eligible for rate progressions.	Administrator, Compensation Administrator, and Generalist: **Compensation > Pay Rate Processing > Rate Progression > Rule Processing**
Target Updates	View target compensation changes that have errors, are ready to process, or have been processed.	Administrator, Compensation Administrator, and Generalist: **Compensation > Incentive Compensation > Enrollment > Target Updates**
Transfer History	View the history of transferred resources or budget amounts.	Administrator, Compensation Administrator, and Generalist: **Compensation > Awarding > Budget Process > Transfer History**
View Compensation (Employee)	View compensation by work assignment, current and historical target variable compensation, and equity grants.	Employee: **View Compensation**
View Compensation (Employee Preview)	View compensation by work assignment, current and historical target variable compensation, and equity grants.	Employee Preview: **Pay**
Working Condition Types	View and create job or position components for working condition types.	Administrator, Compensation Administrator, and Generalist: **Compensation > Jobs And Positions > Job Components > Working Condition Types** or **Compensation > Jobs And Positions > Position Components > Working Condition Types**

Report name	Description	Role and navigation
Working Conditions	View and create job or position components for working conditions.	Administrator, Compensation Administrator, and Generalist: **Compensation > Jobs And Positions > Job Components > Working Conditions** or **Compensation > Jobs And Positions > Position Components > Working Conditions**

Chapter 3: Employee Relations standard reports and lists

Employee relations information for reporting is located throughout the navigation menus. In addition, you can create a report from any list.

This table contains the standard reports and lists for employee relations. To find these items, navigate to the report using the menu or search for the report using the report name. If another name is specified in the Role and navigation column, then search for the menu name.

- Trend reports are used to monitor the number of coaching, corrective actions, or grievances over calendar periods. The default dimensions are Category and Type, but others can be added.
- Turn time average reports show the average number of days for a corrective action or grievance to process. The default dimensions are Category and Type, but others can be added.

Note: Real-time data is not displayed in the trends and turn time averages reports. If data changes, then the reports must be refreshed on demand or by scheduling the report to run later.

Report name	Description	Role and navigation
Coaching	View a list of coaching records for employees.	Administrator and Generalist: **Employee Relations > Coaching**
Coaching Trends	View a trend report of the number of coachings by month or quarter.	Administrator and Generalist: **Employee Relations > Reports > Trends > Coaching**
Corrective Actions	View a list of corrective actions.	Administrator and Generalist: **Employee Relations > Corrective Actions**
Corrective Action Trends	View a trend report of the number of employee corrective actions by month or quarter.	Administrator and Generalist: **Employee Relations > Reports > Trends > Corrective Actions**
Corrective Action Turn Time Average	View the turn time average report for employee corrective actions by month.	Administrator and Generalist: **Employee Relations > Reports > Turn Time Average > Corrective Actions**
Correspondence	View and track correspondence for coaching, corrective actions, or grievances.	Administrator and Generalist: **Employee Relations > Correspondence > Correspondence**

Report name	Description	Role and navigation
Grievances	View a list of employee grievances. Click **Resources** to view a list of resources that are involved in grievances.	Administrator and Generalist: **Employee Relations > Grievances**
Grievance Cost By Type	View a report of the costs associated with a grievance, including subtotals and average costs, broken down by cost type.	Administrator and Generalist: **Employee Relations > Reports > Grievance Costs**
Grievance Trends	View a trend report of the number of employee grievances by month or quarter.	Administrator and Generalist: **Employee Relations > Reports > Trends > Grievance**
Grievance Turn Time Average	View the turn time average report for employee grievance events by month.	Administrator and Generalist: **Employee Relations > Reports > Turn Time Average > Grievance**
Notes	View notes for a resource or update notes that you have created.	Administrator and Generalist: **Employee Relations > Notes**
Totals by Resource	Click **Corrective Actions**, **Grievance**, or **Coaching** to view the totals by resource report for each category.	Administrator and Generalist: **Employee Relations > Reports > Totals By Resource**

Chapter 4: Employee Safety standard reports and lists

Employee safety information for reporting is located throughout the navigation menus. In addition, you can create a report from any list.

This table contains the standard reports and lists for employee safety. To find these items, navigate to the report using the menu or search for the report using the report name. If another name is specified in the Role and navigation column, then search for the menu name.

Report name	Description	Role and navigation
Average Days Away Or Restricted	View the average days that employees for each location were away from work and restricted due to an incident.	Health & Safety Management: **Reports > Safety Reports > Employee Incident Analysis > Average Days Away From Work**
Average Reported Date Lag	View any lag in the date when incidents were reported. This value represents the average of the total number of days per location. It is calculated when the incident-reported date is later than the incident date.	Health & Safety Management: **Reports > Safety Reports > Incident Analysis > Reported Date Lag**
Corrective Actions by Causal Factor	View the number of corrective actions grouped by the causal factors that were identified by their associated safety codes.	Health & Safety Management: **Reports > Safety Reports > Causal Analysis > Corrective Actions By Causal Factor**
COVID-19 Log	View the COVID-19 positive safety incidents that were reported for an organization. Click **Full Log** to view complete information. Click **Masked Log** to view incidents with personally identifying employee information omitted.	Health & Safety Management: **Reports > Safety Reports > COVID-19 Log**
Days Without Incident	View days without incident or injury for each location to which you have access.	Health & Safety Management: **Reports > Safety Reports > Days Without Incident**

Report name	Description	Role and navigation
Employees By Causal Factor	View the number of employees who were impacted by an incident and had follow-up tasks that were marked as corrective actions. The list is sorted by the value in the **Causal Factors** field when the corrective action was assigned.	Health & Safety Management: **Reports > Safety Reports > Causal Analysis > Employees By Causal Factor**
Employee Incident Absences By Location	View the number of employees who had incident-caused absences, grouped by the type of absence.	Health & Safety Management: **Reports > Safety Reports > Employee Incident Analysis > Incident Absences**
Employee Incidents By Injury Or Illness	View the number of employee incidents by injury or illness.	Health & Safety Management: **Reports > Safety Reports > Employee Incident Analysis > By Injury Or Illness**
Employee Incidents By Injury Type	View the number of employee incidents by injury type.	Health & Safety Management: **Reports > Safety Reports > Employee Incident Analysis > By Injury Type**
Employee Incidents By Location	View the number of employee incidents by location.	Health & Safety Management: **Reports > Safety Reports > Employee Incident Analysis > By Location**
Employee Incidents By Position	View the number of employee incidents by position.	Health & Safety Management: **Reports > Safety Reports > Employee Incident Analysis > By Position**
Employee Investigation Log	View observations, safety issues, and near misses that were assigned to you for investigation.	Employee: **Health And Safety > My Investigations**
Employee Safe Behavior	View a list of staff who have received safe-behavior recognition. For employees, view a list of recognitions that you have made for other employees or that others have made for you.	Health & Safety Management: **Safety Management > Safe Behavior** Employee: **Health And Safety > Recognize Safe Behavior**
Follow Ups Completed on Time	View the number of follow-ups that were completed on time, sorted by month.	Health & Safety Management: **Reports > Safety Reports > Incident Analysis > Follow Ups Completed On Time**

Report name	Description	Role and navigation
Health Component Status	Click **Health Component Status** to view the list of employees who are assigned to the selected component. You can filter by status and view expiration dates. Click **Staff Summary** to view the number of employees whose assignment is in each status for the selected component. Use the **Charts** menu to select a graphical or list view.	Manager: **Health And Safety Management > Health Component Status**
Incident Recurrence By Location	View the number of recurrences of incidents by location. These metrics are based on the **Recurrence** field in the incident report. Recurrence categories include `Will Not Recur`, `Unlikely to Recur`, `Likely to Recur`, and `Will Recur`.	Health & Safety Management: **Reports > Safety Reports > Incident Analysis > Recurrence By Location**
Incident Reports	View a list of incidents for the location that is highlighted in the top grid.	Health & Safety Management: **Health & Safety Management > Reports > Safety Reports > Incident Reports**
Incident Types By Location	View the number of incident types by location, sorted by month.	Health & Safety Management: **Reports > Safety Reports > Incident Analysis > Incident Types By Location**
Incidents By Location	View the number of incidents by location, sorted by month.	Health & Safety Management: **Reports > Safety Reports > Incident Analysis > By Location**
Incidents By Root Cause	View the number of follow-up actions that were marked as corrective actions. Corrective actions are grouped by whether they address a root, direct, or indirect cause.	Health & Safety Management: **Reports > Safety Reports > Causal Analysis > Incidents By Root Cause**
Manager Safety Log	View safety observations, incidents, near misses, and safe behaviors for your staff.	Manager: **Health And Safety Management > Manager Safety Log**
Near Misses	View and manage the active near-miss incidents that you have permission to access.	Health & Safety Management: **Safety Management > Safety Near Misses**

Report name	Description	Role and navigation
OSHA	Access OSHA reports for the OSHA Establishment that is highlighted in the top grid. This feature is for US companies only. Reports include OSHA 300, 300 A, and 301.	Health & Safety Management: **Health & Safety Management > Reports > Safety Reports > OSHA**
Safe Behaviors By Category	View the number of safe-behavior records. The categories into which the records are grouped are identified by safety codes.	Health & Safety Management: **Reports > Safety Reports > Safe Behavior Analysis > By Category**
Safe Behaviors By Location	View the number of safe-behavior records by location.	Health & Safety Management: **Reports > Safety Reports > Safe Behavior Analysis > By Location**
Safe Behaviors By Position	View the number of safe-behavior records by the position of the employee who performed them.	Health & Safety Management: **Reports > Safety Reports > Safe Behavior Analysis > By Position**
Safety Incidents	View and manage the active safety incidents that you have permission to access.	Health & Safety Management: **Safety Management > Safety Incidents**
Safety Observations	Report a safety or near-miss event or condition as witnessed by an employee. A safety supervisor can add details to the observation.	Employee: **Health And Safety > Safety Observations**
Safety Profiles	View a list of safety profiles that you have permission to access. Every employee has a safety profile.	Health & Safety Management: **Safety Management > Safety Profiles**
Staff Safety	View safety metrics for your direct or indirect reports. You can view safety incidents, near misses, observations, and recognitions of safe behavior by employee.	Manager: **Health And Safety Management > Staff Safety**

Chapter 5: Goal Management standard reports and lists

Goal management information for reporting is located throughout the navigation menus. In addition, you can create a report from any list.

This table contains the standard reports and lists for goal management. To find these items, navigate to the report using the menu or search for the report using the report name. If another name is specified in the Role and navigation column, then search for the menu name.

Report name	Description	Navigation
Goal Alignment Counts Report	View counts that show how many goals are aligned to the organizational goal shown.	Administrator and Generalist: **Goals > Reports > Goal Alignment Reports > Organization Goal Reports > Goal Alignment Counts**
Goal Dashboard	View pending, active, on hold, and historical goals for employees. You can also view goals that have been submitted for approval.	Manager: **Manage Goals > Goal Dashboard**
Misaligned Resource Goals Report	View resource goals that are aligned to the organizational goal shown but are no longer within the alignment group shown.	Administrator and Generalist: **Goals > Reports > Goal Alignment Reports > Resource Goal Reports > Misaligned Goals**
Missing Resource Goals Report	View resources that do not have resource goals for the selected parameters. For example, alignment type, goal year, goal type, or as of date.	Administrator and Generalist: **Goals > Reports > Missing Resource Goals**
Organizational Goal Action Plan	View action plans for organizational goals. Can be filtered by year and keyword.	Administrator and Generalist: **Goals > Action Plans > Organizational Goals** Goal Leader: **Action Plans > Organizational Goals** Manager: **Manage Goals > Action Plans > Organizational Goals**
Organizational Goals	Goals for an organization. Administrators, Generalists, and Goal Leaders can view goals by organization unit, all organizational goals, or goal alignment. Goal Leaders can also view organizational goal categories.	Administrator and Generalist: **Goals > Organizational Goals** Goal Leader: **Organizational Goals** Manager: **Manage Goals > Organizational Goals**

Report name	Description	Navigation
Resource Goal Action Plan	View action plans for resource goals. Action plans can be filtered by year and keyword.	Administrator and Generalist: **Goals > Action Plans > Resource Goals** Goal Leader: **Action Plans > Resource Goals** Manager: **Manage Goals > Action Plans > Resource Goals**
Resource Goal Weights Report	View resource goals that do not equal 100% for the selected parameters. For example, alignment type, goal year, goal type, or as of date.	Administrator and Generalist: **Goals > Reports > Resource Goal Weights**
Resource Goals	View goals for a selected resource. Click **Errors** to view resource goal errors. Goal Leaders can also view resource goal categories.	Administrator and Generalist: **Goals > Resource Goals** Goal Leader: **Resource Goals** Manager: **Manage Goals > Resource Goals**
Resource Goals Missing Alignment Report	View resource goals that are not aligned to the organizational goal shown but are within the alignment group shown.	Administrator and Generalist **Goals > Reports > Goal Alignment Reports > Organizational Goal Reports > Missing Alignments**
Resource Goals Not Aligned Report	View resource goals that do not align to any organizational goal.	Administrator and Generalist: **Goals > Reports > Goal Alignment Reports > Resource Goal Reports > Unaligned Goals**
Resource Goals Progress Analysis	View goal progress by goal category for the current year.	Administrator and Generalist: **Goals > Reports > Goal Progress** Goal Leader: **Reports > Goal Progress**
Resource Goals Status Analysis	View goal status by goal category for the current year. Statuses include Submitted, Active, Past Due, Completed, and On Hold.	Administrator and Generalist: **Goals > Reports > Goal Status** Goal Leader: **Reports > Goal Status**

Chapter 6: HR Payroll reports and lists

HR Payroll information for reporting is located throughout the navigation menus. In addition, you can create a report from any list.

This table contains the standard reports and lists for HR Payroll. To find these items, navigate to the report using the menu or search for the report using the report name. If another name is specified in the Role and navigation column, then search for the menu name.

Report name	Description	Role and navigation
Accrual Program	View accruals.	Payroll Administrator: **Cycle Processing > Accruals**
Adjustments	View adjustments.	Payroll Administrator: **Off Cycle Processing > Adjustments**
Allocation Tips By Year	View amounts by allocation level. The report includes the gross receipts, charged receipts and tips, service charges, reported direct and indirect tip income, and shortfall allocation.	Payroll Administrator: **Tips Reporting > Allocation Tips By Year**
Bank Reconciliation	View bank reconciliations and voids.	Payroll Administrator: **Off Cycle Processing > Bank Reconciliation**
Bank Reconciliation Import Records	View import records for bank reconciliations.	Payroll Administrator: **Off Cycle Processing > Bank Reconciliation Import**
Calculated Overtime (Cycle Processing)	View calculated overtime for cycle processing.	Payroll Administrator: **Cycle Processing > Overtime > Calculated Overtime**
Calculated Overtime (Off Cycle Processing)	View calculated overtime for off cycle processing.	Payroll Administrator: **Off Cycle Processing > Overtime > Calculated Overtime**
Closed Payroll Register	View payments and payment totals for closed payroll payments.	Payroll Administrator: **Reports > Closed Payroll Register**
Company Holidays	View dates that are designated as holidays for a company.	Payroll Administrator: **Contract Pay > Setup > Holidays > Company Holidays**
Configurable Fields Reporting	View fields that can be used to configure or override field values for year end configurable fields or tax authority configurable fields.	Payroll Administrator: **Regulatory Reporting > Year End Reporting > Employee Configurable Fields**

Report name	Description	Role and navigation
Created Overtime (Cycle Processing)	View created overtime for cycle processing.	Payroll Administrator: **Cycle Processing > Overtime > Created Overtime**
Created Overtime (Off Cycle Processing)	View created overtime for off cycle processing.	Payroll Administrator: **Off Cycle Processing > Overtime > Created Overtime**
Current Employment Statistics Survey Configurable Fields	View fields that can be used to configure or override field values for the Current Employment Statistics Surveys.	Payroll Administrator: **Regulatory Reporting > Current Employment Statistics Reporting > Configurable Fields**
Current Employment Statistics Survey Employee Configurable Fields	View fields that can be used to configure or override employee field values for Current Employment Statistics Surveys.	Payroll Administrator: **Regulatory Reporting > Current Employment Statistics Reporting > Employee Configurable Fields**
Current Employment Statistics Surveys	View Current Employment Statistics Surveys.	Payroll Administrator: **Regulatory Reporting > Current Employment Statistics Reporting > Surveys**
Deduction History	View deductions by payment, quarter, and year, or view total deductions.	Payroll Administrator: **Reports > Deduction History**
Deduction Maintenance Errors	View deduction errors.	Payroll Administrator: **Deduction Maintenance > Deduction Errors**
EFW2 Reporting	View EFW2 reports.	Payroll Administrator: **Regulatory Reporting > Year End Reporting > EFW2 Reporting**
Employee Bank Details	View employee bank details such as routing and account information.	Payroll Administrator: **Resource Maintenance > Bank Details**
Employee Contracts	View employee contract base and additional pay assignment data.	Payroll Administrator: **Contract Pay > Reports > Employee Contracts**
Employee Deductions	View a list of employee deductions.	Payroll Administrator: **Deductions Maintenance > Employee Deductions**
Employee Deduction Audit Reports	View audit reports for employee deductions.	Payroll Administrator: **Reports > Employee Deduction Audit**
Employee Deduction Limit Reports	Monitor deferral amounts of pre-tax and after-tax contributions to ensure that plan participants do not exceed annual limits outlined by the IRS.	Payroll Administrator: **Reports > Employee Deduction Limit Report**
Employee Garnishments	View court-ordered deductions from an employee's pay.	Payroll Administrator: **Resource Maintenance > Garnishments**
Employee Tips	View employee tip records.	Payroll Administrator: **Tips Processing > Employee Tips**

Report name	Description	Role and navigation
Employee Tips By Year	View each employee's shortfall for every allocation level in which the employee reported tip income. Running the **Calculate Shortfall Allocation** action with the **Run Option** of `Finalize Shortfall Calculation` generates records for allocation tips by year and employee tips by year.	Payroll Administrator: **Tips Reporting > Employee Tips By Year**
Employee USERRA Parameters	Define amounts for the Uniformed Services Employment and Reemployment Act.	Payroll Administrator: **Regulatory Reporting > Year End Reporting > Employee USERRA Parameters**
Employment Contracts	View work schedule details as defined in the employment contract.	Payroll Administrator: **Contract Pay > Setup > Employment Contracts** or
Federal Quarterly Configurable Fields	View fields that can be used to configure or override field values on the employee record for federal reporting.	Payroll Administrator: **Regulatory Reporting > Federal Quarterly Reporting > Federal Quarterly Configurable Fields**
Federal Quarterly Tax Returns	View federal quarterly tax returns.	Payroll Administrator: **Regulatory Reporting > Federal Quarterly Reporting > Federal Quarterly Tax Returns**
Finance Interfaces	View finance interfaces.	Payroll Administrator: **Cycle Processing > Finance Interfaces**
Form 8027 Reports	View reports for form 8027 (Employer's Annual Information Return of Tip Income and Allocated Tips).	Payroll Administrator: **Tips Reporting > Form 8027 Reports**
Garnishment History	View garnishment history, posted garnishments, and missing garnishment reports.	Payroll Administrator: **Reports > Garnishment History**
Gross Receipt Reports	Run the **Generate Individual Gross Receipts Report** to allocate the tip shortfall amount using the ratio of the gross receipts entered for an individual to the total gross receipts specified for the allocation level for the same period of time.	Payroll Administrator: **Tips Reporting > Gross Receipts Reporting > Gross Receipt Reports**
Gross Receipts Import	View import records for gross receipts. You can view all receipts, receipts that have not been processed, and errors.	Payroll Administrator: **Tips Processing > Interface > Gross Receipts Import**
Gross Up Payments	View gross up payments.	Payroll Administrator: **Off Cycle Processing > Gross Up Payments**

Report name	Description	Role and navigation
History Import Records	View off cycle history import records.	Payroll Administrator: **Off Cycle Processing > History Load > Import Records**
Holiday Schedules	View holiday pay schedules.	Payroll Administrator: **Contract Pay > Setup > Holidays > Holiday Schedules**
Hours Worked	View the tip shortfall amount using the ratio of hours worked by an individual to the total hours worked by all employees in the allocation level for the same period of time.	Payroll Administrator: **Tips Processing > Hours Worked Allocation**
Hours Worked Reports	Run the **Generate Hours Worked Gross Receipts Report** to allocate the tip shortfall amount of gross receipts using the ratio of hours worked by an individual to the total hour worked by all employees in the allocation level for the same period of time.	Payroll Administrator: **Tips Reporting > Gross Receipts Reporting > Hours Worked Reports**
Individual Gross Receipts	View the tip shortfall amount using the ratio of the gross receipts specified for an individual to the total gross receipts specified for the allocation level for the same period of time.	Payroll Administrator: **Tips Processing > Gross Receipts Allocation**
Maintain Year End Parameter Errors	View year end parameter errors.	Payroll Administrator: **Regulatory Reporting > Year End Reporting > Maintain Year End Parameter Errors**
Manual Payments	View manual payments.	Payroll Administrator: **Off Cycle Processing > Manual Payments**
Manual Payments Audit List	View an audit list of manual payments.	Payroll Administrator: **Reports > Manual Payments Audit**
Missing EFW2 Records	View employees who were not included in the previously submitted EFW2 files, but have wages and taxes that must be reported.	Payroll Administrator: **Regulatory Reporting > Year End Reporting > Missing EFW2 Records**
Missing Time Reports	View employees who have not submitted time for a payroll cycle.	Payroll Administrator: **Time Record Processing > Missing Time Reports**
Missing W-2 Forms	View employees who were not included in the previously submitted W-2 files, but have wages and taxes that must be reported.	Payroll Administrator: **Regulatory Reporting > Year End Reporting > Missing W-2 Forms**
Modeled Payments	View modeled payments.	Payroll Administrator: **Off Cycle Processing > Modeled Payments**

Report name	Description	Role and navigation
Multiple Worksite Reporting	View tax authorities and worksites that can be used for multiple worksite reporting.	Payroll Administrator: **Regulatory Reporting > Multiple Worksite Reporting > Multiple Worksite Reporting**
Multiple Worksite Reporting Configurable Fields	View fields that can be used to configure or override field values for multiple worksite reporting.	Payroll Administrator: **Regulatory Reporting > Multiple Worksite Reporting > Configurable Fields**
Multiple Worksite Reporting Employee Configurable Fields	View fields that can be used to configure or override employee field values for multiple worksite reporting.	Payroll Administrator: **Regulatory Reporting > Multiple Worksite Reporting > Employee Configurable Fields**
Multiple Worksite Reports	View reports for multiple worksites.	Payroll Administrator: **Regulatory Reporting > Multiple Worksite Reporting > Multiple Worksite Reports**
New Hire Reports	View reports for new and rehired employees.	Payroll Administrator: **Regulatory Reporting > New Hire Reporting > New Hire Reports**
Off Cycle Payroll Distributions	View off cycle payroll distributions.	Payroll Administrator: **Off Cycle Processing > Payroll Distributions**
Off Cycle Payroll Register	View payments for the Off Cycle Payroll Register report.	Payroll Administrator: **Off Cycle Processing > Off Cycle Payroll Register**
One Time Deduction Import	View one-time deduction imports.	Payroll Administrator: **Deduction Maintenance > One Time Deductions > One Time Deduction Import**
One Time Deductions	View one-time deductions that are in Not Processed, Current, Future, and Closed By Payroll status.	Payroll Administrator: **Deduction Maintenance > One Time Deductions > One Time Deductions**
Overtime Errors (Cycle Processing)	View overtime errors for cycle processing.	Payroll Administrator: **Cycle Processing > Overtime > Overtime Errors**
Overtime Errors (Off Cycle Processing)	View overtime errors for off cycle processing.	Payroll Administrator: **Off Cycle Processing > Overtime > Overtime Errors**
Pay Rules	View contract pay rules, details, and time record processing.	Payroll Administrator: **Contract Pay > Setup > Pay Rules**
Payment Output Files (Cycle Processing	View print payment output files for cycle processing.	Payroll Administrator: **Cycle Processing > Print Payment Files**
Payment Output Files (Off Cycle Processing	View print payment output files for off cycle processing.	Payroll Administrator: **Off Cycle Processing > Print Payment Files**
Payment Replacement	View replaced payments.	Payroll Administrator: **Off Cycle Processing > Payment Replacement**

Report name	Description	Role and navigation
Payments (Reports)	View a list of employee payments, closed payments, and closed payment totals.	Payroll Administrator: **Reports > Payments**
Payments (Cycle Processing)	View payments, wage totals, and deduction totals.	Payroll Administrator: **Cycle Processing > Payments**
Payroll Checks (Reports)	View payroll checks and closed payroll checks.	Payroll Administrator: **Reports > Payroll Checks**
Payroll Checks (Cycle Processing)	View open payroll checks.	Payroll Administrator: **Cycle Processing > Payroll Checks**
Payroll Cycle	View in-progress payment schedules within the current payroll cycle and view data related to each payment schedule.	Payroll Administrator: **Cycle Processing > Payroll Cycle**
Payroll Cycle Summary	View a summary of payroll cycle processing.	Payroll Administrator: **Cycle Processing > Payroll Cycle Summary**
Payroll Distributions	View payroll distributions.	Payroll Administrator: **Cycle Processing > Payroll Distributions**
Payroll Off Cycle	View and configure payment schedules that fall outside of the regular payroll cycle and view data related to each payment schedule.	Payroll Administrator: **Off Cycle Processing > Payroll Off Cycle**
Payroll Off Cycle Summary	View a summary of payroll off cycle processing.	Payroll Administrator: **Off Cycle Processing > Payroll Off Cycle Summary**
Payroll Register	View payments for the Payroll Register report.	Payroll Administrator: **Cycle Processing > Payroll Register**
Pending Imported Payments	View off cycle pending payments.	Payroll Administrator: **Contract Pay > Setup > Holidays > Pending Payments**
Posted Payroll Cycle Summary	View posted payroll cycle summary records and errors.	Payroll Administrator: **Reports > Posted Payroll Cycle Summary**
Posted Payroll Distributions	View posted payroll distributions.	Payroll Administrator: **Reports > Posted Payroll Distributions**
Quarterly Reporting	View tax authority quarterly reporting information that is used to generate state quarterly unemployment insurance	Payroll Administrator: **Regulatory Reporting > State Quarterly Reporting > Quarterly Reporting**

Report name	Description	Role and navigation
Recurring Time Records	View recurring time records that are used as templates to create time records each pay period. They are used for employees who work the same number of hours each pay period or must be paid the same amount each pay period.	Payroll Administrator: **Time Record Processing > Recurring Time Records**
Retroactive Pay Changes	View retroactive pay calculations, which include the old pay rate, new pay rate, and the difference between these rates.	Payroll Administrator: **Time Record Processing > Retroactive Pay Changes**
Shortfall Allocation	View the shortfall allocation of tips to tipped employees who did not report the minimum percentage required by the Internal Revenue Service (IRS) of their gross receipts.	Payroll Administrator: **Tips Processing > Shortfall Allocation**
SSN Verification Report	View Social Security number verification output.	Payroll Administrator: **Regulatory Reporting > Social Security Number Verification Reporting**
Tax Authority Configurable Field Records	View fields that can be used to configured for tax authority reporting.	Payroll Administrator: **Regulatory Reporting > Year End Reporting > Tax Authority Configurable Fields**
Tax Authority Current Employment Statistics Reporting	Generate a file of current employment statistics to submit to the Bureau of Labor Statistics.	Payroll Administrator: **Regulatory Reporting > Current Employment Statistics Reporting > Current Employment Statistics Reporting**
Tax Credit Reports	View the employer tax credit for FICA and Medicare tax obligation paid by the employer for wages paid to satisfy minimum wage. Excess tips are considered as part of the calculations. The report provides totals for wages, hours, minimum wage due, tip credit, tips, excess tips, and tax credit.	Payroll Administrator: **Tips Reporting > Tax Credit Reporting**
Tax Deduction History	View tax deduction history by tax authority legal entity, tax authority legal establishment, and employee details.	Payroll Administrator: **Reports > Tax Deduction History**
Tax Deductions By Location	View employee tax locations.	Payroll Administrator: **Deduction Maintenance > Tax Deductions By Location**
Time By Pay Period	View time record totals by batch and current cycle by pay period, and view future totals by pay period.	Payroll Administrator: **Time Record Processing > Time By Pay Period**

Report name	Description	Role and navigation
Time Record Batches	View batches of time records that can be released for processing.	Payroll Administrator: **Time Record Processing > Time Record Batches**
Time Record Errors	View recurring time record errors.	Payroll Administrator: **Time Record Processing > Time Record Errors**
Time Record Totals	View time record totals by batch and current cycle, and view future totals.	Payroll Administrator: **Time Record Processing > Time Record Totals**
Time Records	View time records that can be used for payroll processing.	Payroll Administrator: **Time Record Processing > Time Records**
Tip Credit And Shortage	View current and historical tips records.	Payroll Administrator: **Cycle Processing > Tips > Tip Credits And Shortages**
Tip Credit And Shortage (Off Cycle)	View current and historical tips records.	Payroll Administrator: **Off Cycle Processing > Tips > Tip Credits And Shortages**
Tips Calculation Errors	View calculation errors for tips.	Payroll Administrator: **Cycle Processing > Tips > Tips Calculation Errors**
Tips Calculation Off Cycle Errors	View calculation errors for tips.	Payroll Administrator: **Off Cycle Processing > Tips > Tips Calculation Errors**
Tips Reporting Log	View errors that may have occurred when a tips report was run, along with their source.	Payroll Administrator: **Tips Reporting > Tips Reporting Log**
Unemployment Employee Configurable Fields	View fields that can be used to configure or override field values on the employee record for state reporting.	Payroll Administrator: **Regulatory Reporting > State Quarterly Reporting > Employee Configurable Fields**
Unemployment Reports	View reports that have been generated for state quarterly unemployment insurance.	Payroll Administrator: **Regulatory Reporting > State Quarterly Reporting > Unemployment Reports**
Update Eligibility Group Deductions	View a list of eligibility group deductions to update.	Payroll Administrator: **Deduction Maintenance > Update Eligibility Group Deductions**
Update Employee Deductions	View a list of employee deductions to update.	Payroll Administrator: **Deduction Maintenance > Update Employee Deductions**
Update Employee Garnishments	View a list of employee garnishments to update.	Payroll Administrator: **Deduction Maintenance > Update Employee Garnishments**
W-2 Reporting	View W-2 reports.	Payroll Administrator: **Regulatory Reporting > Year End Reporting > W-2 Reporting**

Report name	Description	Role and navigation
Wage History	View taxable wages for employees. You can view wage history, wages by quarter, or wage totals.	Payroll Administrator: **Reports > Wage History**
Weeks Worked	View the weeks worked calculation, which is run before reporting for state unemployment insurance is processed.	Payroll Administrator: **Regulatory Reporting > State Quarterly Reporting > Weeks Worked Calculation > Weeks Worked**
Weeks Worked Errors	View errors in the weeks worked calculation.	Payroll Administrator: **Regulatory Reporting > State Quarterly Reporting > Weeks Worked Calculation > Weeks Worked Errors**
Weighted Average Time Records	View pay codes with a calculation type of Weighted Average to support paid sick leave regulations that include rate of pay requirements.	Payroll Administrator: **Time Record Processing > Weighted Average**
Work Schedules	View the actual work hours that are defined for the organization. For example, the night shift, or Monday through Friday 9 AM to 5 PM.	Payroll Administrator: **Contract Pay > Setup > Employment Contracts > Work Schedules** or **Employment Contract Administrator > Employment Contracts > Work Schedules**
Workers Compensation Reports	View workers compensation reports. The reports can be submitted to a company's insurance company so they can determine the amount of premiums owed.	Payroll Administrator: **Reports > Workers Compensation**
Year End Configurable Field Records	View fields that can be used to configure or override field values for year end reporting.	Payroll Administrator: **Regulatory Reporting > Year End Reporting > Year End Configurable Fields**
Year End Employee Configurable Fields	View fields that can be used to configure or override field values on the employee record for year end reporting.	Payroll Administrator: **Regulatory Reporting > Year End Reporting > Employee Configurable Fields**
Year End Rates And Limits	View year end rates and limits.	Payroll Administrator: **Regulatory Reporting > Year End Reporting > Year End Rates And Limits**
Year End Remove Arrears	View withholding arrears and removed withholding arrears.	Payroll Administrator: **Deduction Maintenance > One Time Deductions > Year End Remove Arrears**
Year End Reports	View year end reports.	Payroll Administrator: **Regulatory Reporting > Year End Reporting > Year End Reports**

Report name	Description	Role and navigation
Year End Tip Allocation	View amounts for year end after the **Calculate Shortfall Allocation** action in **Tips Processing > Shortfall Allocation** is run with the Run Option of `Finalized` and **Year End** check box selected. The **Calculate Shortfall Allocation** action also closes records for the payroll year specified if the **Year End** check box is selected. **Note:** After records are closed by running the **Calculate Shortfall Allocation** action with **Year End** checked, you can no longer calculate shortfall allocation for that year. Only select the **Year End** check box after the shortfall allocation calculation is reviewed.	Payroll Administrator: **Tips Reporting > Year End Tip Allocation**

Chapter 7: Occupational Health standard reports and lists

Occupational health information for reporting is located throughout the navigation menus. In addition, you can create a report from any list.

This table contains the standard reports and lists for occupational health. To find these items, navigate to the report using the menu or search for the report using the report name. If another name is specified in the Role and navigation column, then search for the menu name.

Report name	Description	Role and navigation
Appointment Page	View all appointments that were made for components.	Health & Safety Management: **Occupational Health > Monitor Health Components > All Appointments**
Appointments List	View employees who have been scheduled to complete the selected group appointment for one or more health components.	Health & Safety Management: **Occupational Health > Monitor Health Components > Group Appointments**
Complete Component	View a list of employees who have been assigned to the selected health component.	Health & Safety Management: **Occupational Health > Monitor Health Components > Complete Components**
Completed Components	View completion metrics and an assigned-employee list for the selected health component. You can retrieve this information: • The percentage complete of all health components that have been assigned • Identification of the employees who have overdue components • Identification of the due date and completion status for each component	Health & Safety Management: **Reports > Occupational Health Reports > Completed Chart**

Report name	Description	Role and navigation
Component Status	View a count of health components by status of the component for employees. You can retrieve this information: • Count of health components by the component status • Location-sorting of employees who were assigned health components • Drill-down or detail information by position and health component	Health & Safety Management: **Reports > Occupational Health Reports > Status By Location Cube**
Components Completed on Time	View a count of health components that were completed on time for employees. You can retrieve this information: • Count of health components that were completed on time for employees • Location-sorting of employees who were assigned health components	Health & Safety Management: **Reports > Occupational Health Reports > Completed On Time Cube**
Correspondence	Search for health-related correspondence and contacts. This includes appointments, email notifications, etc.	Health & Safety Management: **Occupational Health > History > Correspondence**
Employee Clearance	View which employees are cleared and not cleared for a completed health component. For example, a flu shot or COVID-19 test has been completed so the employee is cleared.	Health & Safety Management: **Occupational Health > Employee Clearances** Manager: **Health And Safety Management > Employee Clearances**
Employee Health Components	View a list of employees who have been assigned to health components.	Health & Safety Management: **Occupational Health > Monitor Health Components > Employees**

Report name	Description	Role and navigation
Employee Health Records	View a list of health components that were assigned to the selected employee on the **Employee** tab. You can access information about a specific health component. View a list of employees who were assigned to complete the selected health component on the **Health Component** tab.	Health & Safety Management: **Occupational Health > Maintain Health Records > Health Records**
Expiration Maintenance	View expired assignments where the due date has passed or expiring assignments where the due date is approaching soon.	Health & Safety Management: **Occupational Health > Maintain Health Records > Expiration Maintenance**
Health Component Status	View the list of employees who are assigned to the selected component. Click **Staff Summary** to view the number of employees whose assignment is in each status for the selected component.	Manager: **Health And Safety > Health Component Status**
Health Components	View and update current health-component assignments. Statuses include In Process, Pending Approval, Refused, Waived, and Completed. You can also view assignments by All, Employee, and Summary.	Health & Safety Management: **Occupational Health > Monitor Health Components > Health Components**
Health Components (Overdue)	View a list of assignments whose due date is in the past or whose due date is approaching in the near future as defined by your organization.	Health & Safety Management: **Occupational Health > Monitor Health Components > Overdue Components**
Health History	Search for health component assignments for employees.	Health & Safety Management: **Occupational Health > History > Health History**
Health Profiles	Search for the health profile of an employee.	Health & Safety Management: **Occupational Health > History > Health Profiles** Employee: **Health And Safety > My Health Records**
Occupational Health Update	View the list of employees whose health-record locations changed after the last time that the utility to update locations was run.	Health & Safety Management: **Occupational Health > Manage Health Location Data**

Report name	Description	Role and navigation
Renewals	Renew health records that are within the time range for renewal. Select an eligibility group and then select a health component to renew.	Health & Safety Management: **Occupational Health > Maintain Health Records > Renewals**
Staff Health	View the health-assignment information about your reports such as health records, completed health components, and appointments.	Manager: **Health And Safety > Staff Health**

Chapter 8: Performance Management standard reports and lists

Performance management information for reporting is located throughout the navigation menus. In addition, you can create a report from any list.

This table contains the standard reports and lists for performance management and employee engagement. To find these items, navigate to the report using the menu or search for the report using the report name. If another name is specified in the Role and navigation column, then search for the menu name.

Report name	Description	Navigation
Accomplishments	View top contributions and accomplishments that occurred after the last check-in meeting.	Manager: **Manager > Engagement > Dashboard > Accomplishments** Employee: **Employee > My Engagement > Accomplishments**
Appraisal Criteria	View appraisal criteria. • Click **Criteria** to view and define the performance criteria that appraisers are asked to rate. • Click **Criteria Groups** to view and define appraisal criteria groups for performance appraisals.	Administrator and Generalist: **Set Up > Performance > Appraisal Criteria**
Appraisal Maintenance	View and update appraisals that are in a specific status.	Administrator and Generalist: **Performance > Appraisal Maintenance**
Challenges	View challenges that might be impacting performance.	Manager: **Manager > Engagement > Dashboard > Open Challenges** Employee: **Employee > My Engagement > Open Challenges**

Report name	Description	Navigation
Check-Ins	View information for a check-in, including the date and manager comments.	Manager: **Manager > Engagement > Dashboard > Check-Ins** Employee: **Employee > My Engagement > Check-Ins**
Performance Appraisal Dashboard	Access information for the appraisals to which you have access.	Administrator and Generalist: **Performance > Appraisal Dashboard**
Performance Appraisals	View and update self-appraisals and other appraisals.	Employee: **Employee > My Reviews**
Raves Received	View raves that have been submitted for an employee.	Manager: **Manager > Engagement > Dashboard > Raves Received** Employee: **Employee > My Engagement > Raves Received**
Raves Submitted	View raves that have been submitted by an employee.	Manager: **Manager > Engagement > Dashboard > Raves Submitted** Employee: **Employee > My Engagement > Raves Submitted**
Review Performance	View and update performance appraisals that are assigned to your staff.	Manager: **Manager > Review Performance**
Tasks	View projects and assignments that are in progress.	Manager: **Manager > Engagement > Dashboard > Open Tasks** Employee: **Employee > My Engagement > Open Tasks**

Chapter 9: Position Monitoring standard reports and lists

Position monitoring information for reporting is located throughout the navigation menus. In addition, you can create a report from any list.

This table contains the standard reports and lists for position monitoring. To find these items, navigate to the report using the menu or search for the report using the report name. If another name is specified in the Navigation column, then search for the menu name.

Report name	Description	Navigation
Budget Net Changes	Determine if a budget has changed after it was created. View available budget changes over time by full-time equivalent (FTE), headcount, or salary.	Position Budget Manager: **Reports > Budget Net Changes** Manager: **Position Monitoring > Budget Net Changes**
Budget Variance	Determine if a budget is understaffed or overstaffed. View data by FTE, headcount, or salary.	Position Budget Manager: **Reports > Budget Variance** Manager: **Position Monitoring > Budget Variance**
Budgets	Manage position budgets as a manager. A position budget plan defines position budgets and budget controls for a specific time range.	Manager: **Position Monitoring > Budgets**
Plan Comparison By Organization Unit	View budget plan comparisons by organization unit and FTE, headcount, or salary.	Position Budget Manager: **Reports > Plan Comparisons > By Organization Unit**
Plan Comparison By Job	View budget plan comparisons by job and FTE, headcount, or salary.	Position Budget Manager: **Reports > Plan Comparisons > By Job**
Plan Comparison By Position	View budget plan comparisons by position and FTE, headcount, or salary.	Position Budget Manager: **Reports > Plan Comparisons > By Position**
Jobs	View a list of jobs to use in position budget planning.	Position Budget Manager: **Jobs And Positions > Jobs**
Position Budgets	Manage position budgets as an administrator. A position budget plan defines position budgets and budget controls for a specific time range.	Position Budget Manager: **Position Budgets**

Report name	Description	Navigation
Position Plans	Manage position plans and use position plan rules to control whether a budget can be exceeded.	Position Budget Manager: **Position Plans**
Positions	View a list of positions to use in position budget planning.	Position Budget Manager: **Jobs And Positions > Positions**
Requisitions	View a list of job requisitions to use in position budget planning.	Position Budget Manager: **Requisitions**
Resources	Search for resources or work assignments to use in position budget planning.	Position Budget Manager: **Resources**

Chapter 10: Succession Management standard reports and lists

Succession management information for reporting is located throughout the navigation menus. In addition, you can create a report from any list.

This table contains the standard reports and lists for succession management. To find these items, navigate to the report using the menu or search for the report using the report name. If another name is specified in the Role and navigation column, then search for the menu name.

Report name	Description	Role and navigation
Fit Analysis Comparison	Search for a resource to view their fit-analysis comparison. View the chart that shows how the resource's qualifications compare to those required for the position.	Administrator: **Resources > Fit Analysis Comparison**
Fit Analysis Model	Search for positions with qualifications that match your own.	Employee: **To Do > Position Qualification Search**
Job Career Path	Manage a career path, which defines a relationship among jobs within an organization.	Administrator and Generalist: **Succession > Job Career Path**
Pool Sources	View and create a pool source, which is used to create talent pools.	Administrator: **Set Up > Succession > Pool Source**
Positions	Identify a position as key or critical in your organization. A key position is required for your organization's ability to function effectively. A critical position must be monitored because of a known impending succession impact.	Administrator and Generalist: **Succession > Manage Positions**
Readiness	View and create readiness levels that indicate when successors are ready to perform a position.	Administrator: **Set Up > Succession > Readiness**
Resources	View succession information for a resource.	Administrator and Generalist: **Succession > Manage Resources**
Retention Reasons	View and create retention reasons to identify resources that are at risk for leaving your organization.	Administrator: **Set Up > Succession > Retention Reason**

Report name	Description	Role and navigation
Succession Plan	Manage bench strength, which is the readiness level of the confirmed resources in the talent pool. You can also add resources to a talent pool or a succession pool from a succession plan as a starting point.	Administrator and Generalist: **Succession > Succession Plan**
Talent Pools	Create a talent pool, which is a group of resources that share a common criteria or functional area.	Administrator and Generalist: **Succession > Manage Talent Pools**

Chapter 11: Talent Science standard reports and lists

Talent Science information for reporting is located throughout the navigation menus. In addition, you can create a report from any list.

This table contains the standard reports and lists for Talent Science. To find these items, navigate to the report using the menu or search for the report using the report name. If another name is specified in the Role and navigation column, then search for the menu name.

Report name	Description	Role and navigation
Behavioral Disconnect Activities	View and create activities assigned to improve behavioral characteristics.	Administrator: **Set Up > Talent Science > Behavioral Disconnect Activities**
Behavioral Profile Core Characteristics	View and create behavioral characteristics for an employee and rank them using a scorecard.	Administrator: **Set Up > Talent Science > Behavioral Profile Core Characteristics**
Calibration Data	Extract employee data based on the primary work assignment.	Talent Science Administrator: **Calibration Extract > Calibration Data**
Flight Risk Analysis	View flight risk data by supervisor.	Talent Science Administrator: **Flight Risk > Analysis**
Flight Risk Data	View the flight risk calculation for an employee.	Talent Science Administrator: **Flight Risk > Flight Risk Data**
Predictor Fields	View and set up predictor fields that are used for outcome calculation.	Talent Science Administrator: **Setup > Predictor Fields**
Predictive Outcome Configuration	View and create predictive outcome configuration records for the organization.	Talent Science Administrator: **Setup > Configuration**
Predictive Outcome Department	View and create department mapping records using the spreadsheet from the Infor Talent Science team.	Talent Science Administrator: **Setup > Department Mappings**
Talent Science Assessment Packages	View and create assessment packages for positions. Assessment packages include behavioral characteristics.	Administrator: **Set Up > Talent Science > Assessment Packages**