DEVELOPING NEW EMPLOYEES AND MANAGERS

Quarterly Reporting

There are several custom reports that have been developed in Workday for each of the trainings required in the Developing New Employees and Managers expectation. Anyone with the role of HR Partner, Learning Partner, Workforce Liaison, Content Creator, and Managers can run these reports in Workday. This document provides information on the quarterly statewide reporting cycle, how to run the reports in Workday, and the information contained in the reports.

QUARTERLY REPORTING FOR FOUNDATIONAL, UPLIFT, CUSTOMER SERVICE & PAF

DAS – CHRO will do the initial reporting for the Foundational training program, Uplift Your Benefits, Customer Service, and the Performance Accountability and Feedback (PAF) trainings as follows:

1. **October 2023**: Reporting for July 1 – September 30, 2023, will be done the first week of October 2023.
2. **January 2024**: Reporting for October 1 – December 31, 2023, will be done the first week of January 2024.

Going forward CHRO will report as follows:

Quarterly Cycle	Report Compiled
January 1 – March 31	First week of April
April 1 – June 30	First week of July
July 1 – September 31	First week of October
October 1 – December 31	First week of January

QUARTERLY REPORTING FOR NEW EMPLOYEE ORIENTATION

DAS – CHRO will do the initial reporting for the new employee orientation programs (NEO) as follows:

1. **First Week of January 2024**: Reporting for October 1, 2023 – December 31, 2023, DAS – CHRO will give an update on the agencies who have an existing NEO and what their progress is for having 100% of new employees complete the agency NEO. This will be the first quarter we are checking for compliance for agencies who already have NEOs in place. Those agencies who don't have a NEO and won't have one implemented until December 31, 2023, will be required to be 100% compliant by the next quarter (January 1 – March 31).

Going forward CHRO will report as follows:

Quarterly Cycle	Report Compiled
January 1 – March 31	First week of April
April 1 – June 30	First week of July
July 1 – September 31	First week of October
October 1 – December 31	First week of January

REQUIRED TRAINING TIMEFRAMES

Here are the required training timeframes for each of the trainings and completion of the new employee orientation.

- **Foundational**: Managers need to be enrolled or waitlisted into a cohort within 5 days of it being assigned.
- **Performance, Accountability, and Feedback (PAF)**: Managers need to complete the training within 30 days of it being assigned.
- **Uplift Your Benefits**: Employees need to complete the training within 30 days of it being assigned.
- **Customer Service**: Employees need to complete the training within 60 days of it being assigned.
- **New Employee Orientation**: Employees need to complete the training within 60 days of it being assigned.

CUSTOM REPORTS

The following custom reports are available.

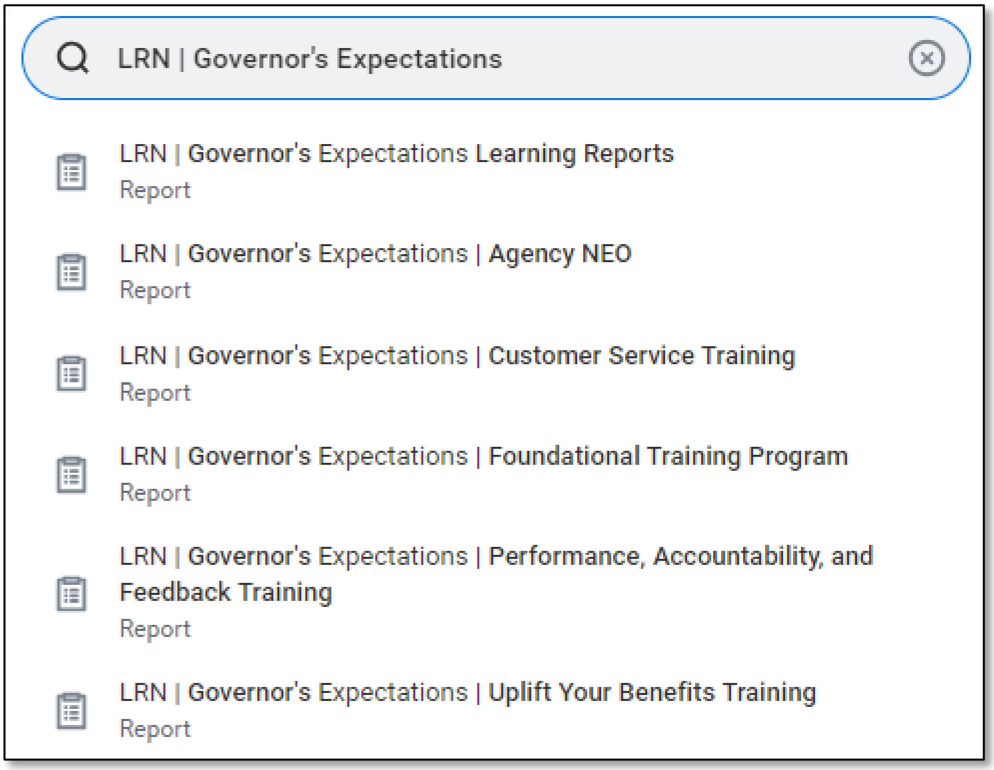
- LRN | Governor's Expectations | Foundational Training Program
- LRN | Governor's Expectations | Performance, Accountability, and Feedback Training
- LRN | Governor's Expectations | Uplift Your Benefits Training
- LRN | Governor's Expectations | Customer Service Training
- LRN | Governor's Expectations | Agency NEO

Important: The LRN | Governor's Expectations | Agency NEO report does not have data because agencies need to submit their NEO Approval Form. Once the agency's NEO program is approved then we will be able to update the report with the necessary information to populate the data for the report.

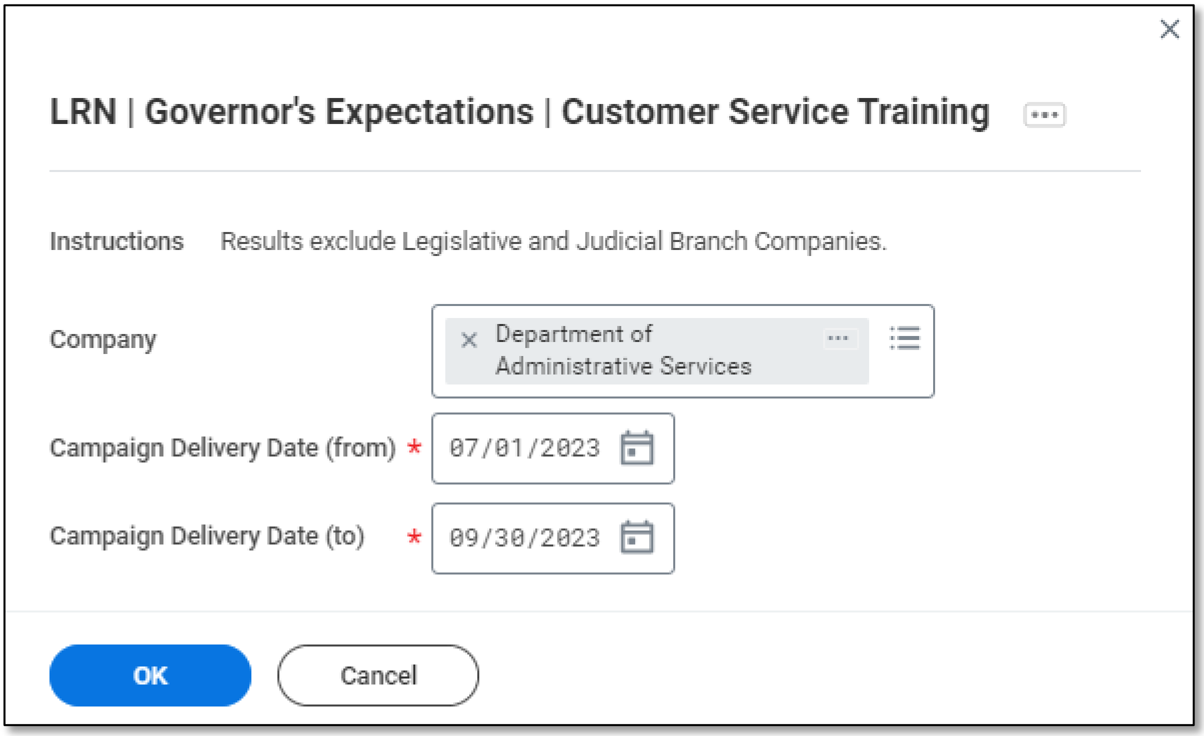
RUNNING THE REPORTS IN WORKDAY

Follow the instructions below to run any of the reports.

1. In the Search field type in the name of the report or type in LRN | Governor's Expectations and all the reports will display.

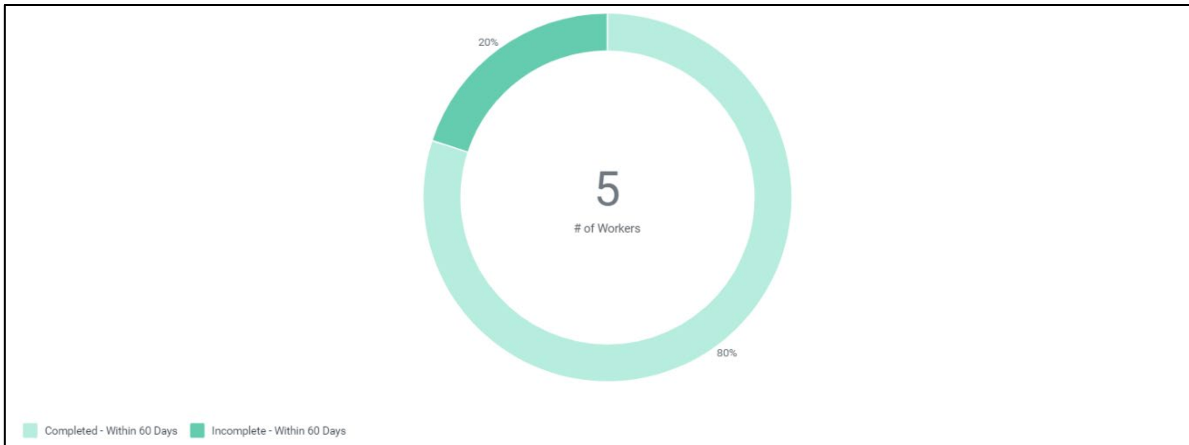


2. Do the following for the prompts.
    a. Search for your agency name in the 'Company' field.
    b. For the Campaign Delivery Date (from) and (to) fields it will auto-populate to the current quarter. You can change the date range or leave it as is.
3. Click 'OK' to run the report.



4. The first screen will provide a summary of the number of employees hired at the agency, and who has and has not completed the training (or enrolled into Foundational) within the required timeframe.

   DAS – CHRO will use the summary screen to do the statewide reporting.



2 items

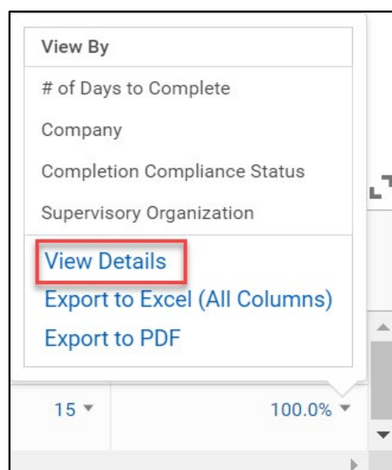
Company	Completed - Within 60 Days		Incomplete - Within 60 Days		Total	
	# of Workers	% of Total Workers	# of Workers	% of Total Workers	# of Workers	% of Total Workers
Department of Administrative Services	4	80.0%	1	20.0%	5	100.0%
Total	4	80.0%	1	20.0%	5	100.0%

5. To view the details of the report, go to the column labeled "% of Total Workers", click on the "100%" drop down and a submenu will display.

2 items

Company	Incomplete - Over 60 Days		Completed - Within 60 Days		Incomplete - Within 60 Days		Total	
	# of Workers	% of Total Workers	# of Workers	% of Total Workers	# of Workers	% of Total Workers	# of Workers	% of Total Workers
Department of Administrative Services	7	46.7%	6	40.0%	2	13.3%	15	100.0%
Total	7	46.7%	6	40.0%	2	13.3%	15	100.0%

6. From the submenu, click on "View Details" and a new window will display.



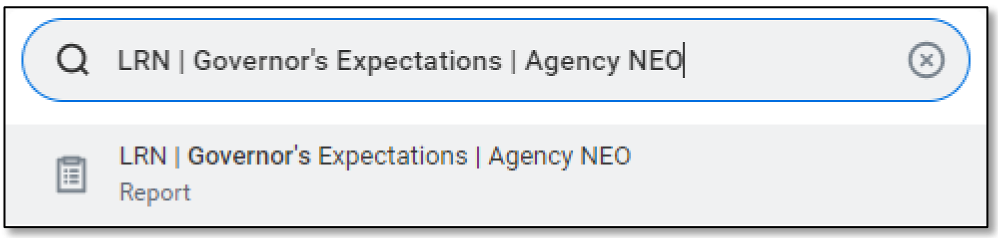
7. The View Details screen will vary by report. The next section provides a description of the View Details screen and which report(s) it applies to.

   NOTE: The completion compliance status is based on the date the campaign was delivered to the new employee rather than on their hire date in case the new employee doesn't receive the campaign assignment on their hire date so that it won't count against them or the agency.

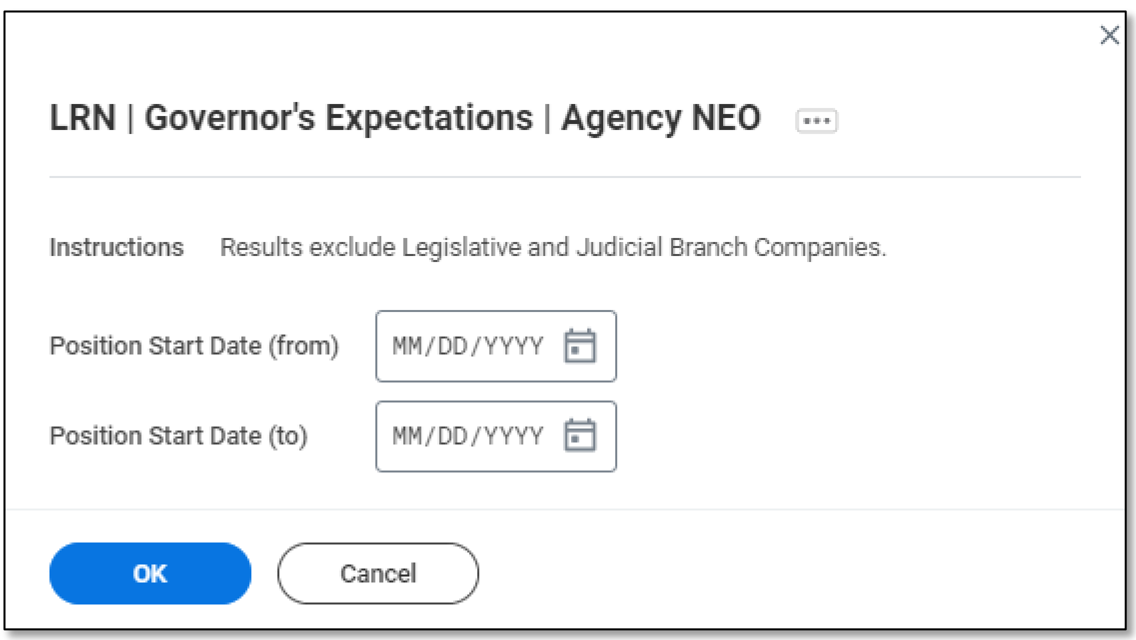
RUNNING THE NEO REPORT IN WORKDAY

Follow the instructions below to run the agency NEO report.

1. In the Search field type in LRN | Governor's Expectations | Agency NEO.

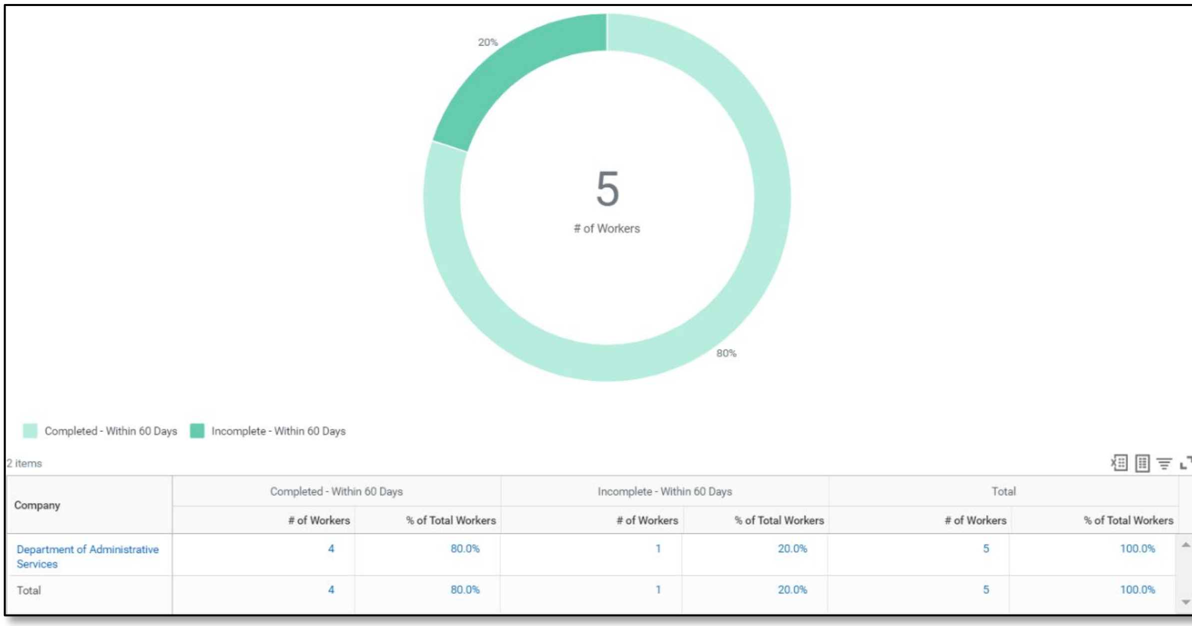


2. You can leave the prompts blank or enter in position start dates.
3. Click 'OK' to run the report.



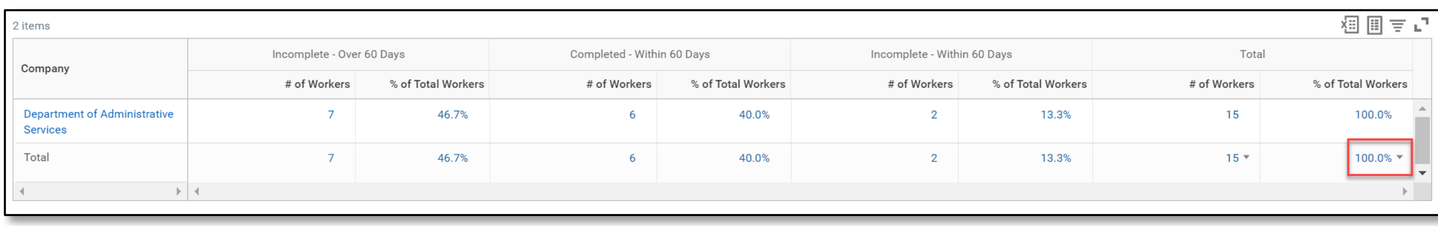
4. The first screen will provide a summary of the number of employees hired at the agency, and who has and has not completed the training (or enrolled into Foundational) within the required timeframe.

   DAS – CHRO will use the summary screen to do the statewide reporting.



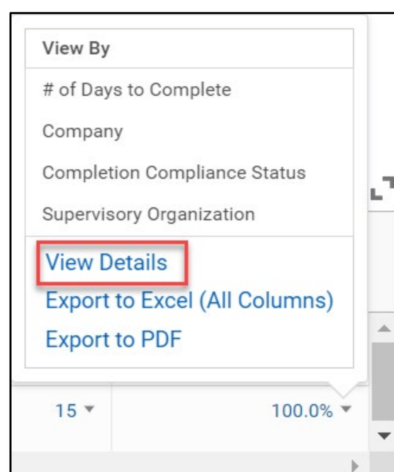
Company	Completed - Within 60 Days		Incomplete - Within 60 Days		Total	
	# of Workers	% of Total Workers	# of Workers	% of Total Workers	# of Workers	% of Total Workers
Department of Administrative Services	4	80.0%	1	20.0%	5	100.0%
Total	4	80.0%	1	20.0%	5	100.0%

5. To view the details of the report, go to the column labeled "% of Total Workers", click on the "100%" drop down and a submenu will display.



Company	Incomplete - Over 60 Days		Completed - Within 60 Days		Incomplete - Within 60 Days		Total	
	# of Workers	% of Total Workers	# of Workers	% of Total Workers	# of Workers	% of Total Workers	# of Workers	% of Total Workers
Department of Administrative Services	7	46.7%	6	40.0%	2	13.3%	15	100.0%
Total	7	46.7%	6	40.0%	2	13.3%	15	100.0%

6. From the submenu, click on "View Details" and a new window will display.



7. The View Details screen will vary by report. The next section provides a description of the View Details screen and which report(s) it applies to.

   NOTE: The completion compliance status is based on the date the campaign was delivered to the new employee rather than on their hire date in case the new employee doesn't receive the campaign assignment on their hire date so that it won't count against them or the agency.

Foundational	
Column Name	**Column Description**
Company	This is the new employee's agency.
Supervisory Organization	This can be the new employee's agency, division, program, or unit.
Worker	This is the new employee's first and last name.
Employee ID	This is the new employee's employee ID number (OR#).
Employee Type	This is the new employee's position type.
Job Profile	This is the new employee's job classification.
Worker's Email	This is the new employee's email address for work.
Manager's Email	This is the new employee's manager's email.
Position Start Date	This is the date the new employee was hired at an Executive Branch agency that is under ORS 240 authority.
Campaign Assigned	This is the name of the campaign assigned to the employee.
Campaign Delivery Date	This is the date an email and notification in Workday was delivered to the employee.
Completion Compliance Status	This is based on the date the campaign was delivered to the employee and the completion date. Here are the possible completion statuses that will display: • Enrolled – Within 5 Days of Assignment: The employee enrolled into the training within the required timeframe. • Enrolled – Over 5 Days from Assignment: The employee enrolled into the training but not within the required timeframe and did not meet the expectation. • Not Enrolled – Over 5 Days from Assignment: The employee did not enroll into the training within the required timeframe and did not meet the expectation. • Not Enrolled – Still Within 5 Days of Assignment: The employee is still within the required timeframe to enroll into the training.
Enrollment/Waitlisted Date	This is the system generated date for when the manager enrolled or waitlisted into a cohort.
Enrollment Status	The options are enrolled, waitlisted, dropped, canceled, or the field is blank. If a manager was dropped or canceled from a cohort the completion status will still recognize they are not enrolled or waitlisted in a cohort and will display the Not Enrolled – Over 5 Days from Assignment or Not Enrolled – Still Within 5 Days of Assignment until they enroll or waitlist into another cohort.
Completion Date	This is the system generated date for when the employee completed the training assignment (if blank they haven't completed the training).
# of Days to Enroll/Waitlist from Assignment	This is the count of days from when the training was assigned to when the manager enrolled or waitlisted into a cohort.
# of Days to Complete from Campaign Assignment	This column counts how many days it took the manager to complete the training from when it was assigned.

Performance, Accountability, and Feedback	
Column Name	**Column Description**
Company	This is the new employee's agency.
Supervisory Organization	This can be the new employee's agency, division, program, or unit.
Worker	This is the new employee's first and last name.
Employee ID	This is the new employee's employee ID number (OR#).
Employee Type	This is the new employee's position type.
Job Profile	This is the new employee's job classification.
Worker's Email	This is the new employee's email address for work.
Manager's Email	This is the new employee's manager's email.
Position Start Date	This is the date the new employee was hired at an Executive Branch agency that is under ORS 240 authority.
# of Days In-Scope	This column counts how many days the new manager has been in the position.
Campaign Assigned	This is the name of the campaign assigned to the employee.
Campaign Delivery Date	This is the date an email and notification in Workday was delivered to the employee.
Completion Compliance Status	This is based on the date the campaign was delivered to the employee and the completion date. Here are the possible completion statuses that will display: • Completed – Within 30 Days of Assignment: The employee completed the training within the required timeframe. • Completed – Over 30 Days from Assignment: The employee completed the training but not within the required timeframe and did not meet the expectation. • Incomplete – Over 30 Days from Assignment: The employee did not complete the training within the required timeframe and did not meet the expectation. • Incomplete – Still Within 30 Days of Assignment: The employee is still within the required timeframe to complete the training.
Module 1, Module 2, & Module 3 Completion Dates	This is the system generated date for when the employee completed the training (if blank they haven't completed it).
# of Days to Complete from Campaign Assignment	This column counts how many days it took the manager to complete the training from when it was assigned.

NEO, Customer Service, and Uplift Your Benefits	
Column Name	**Column Description**
Company	This is the new employee's agency.
Supervisory Organization	This can be the new employee's agency, division, program, or unit.
Worker	This is the new employee's first and last name.
Employee ID	This is the new employee's employee ID number (OR#).
Employee Type	This is the new employee's position type.
Job Profile	This is the new employee's job classification.
Worker's Email	This is the new employee's email address for work.
Manager's Email	This is the new employee's manager's email.
Position Start Date	This is the date the new employee was hired at an Executive Branch agency that is under ORS 240 authority.
Campaign Assigned	This is the name of the campaign assigned to the employee.
Campaign Delivery Date	This is the date an email and notification in Workday was delivered to the employee.
Completion Compliance Status	This is based on the date the campaign was delivered to the employee and the completion date. Here are the possible completion statuses that will display. The X is the number of days the training needs to be completed by (either 60 days for the NEO and Customer Service training or 30 days for the Uplift training): • Completed – Within X Days of Assignment: The employee completed the training within the required timeframe. • Completed – Over X Days from Assignment: The employee completed the training but not within the required timeframe and did not meet the expectation. • Incomplete – Over X Days from Assignment: The employee did not complete the training within the required timeframe and did not meet the expectation. • Incomplete – Still Within X Day Assignment: The employee is still within the required timeframe to complete the training.
Completion Date	This is the system generated date for when the employee completed the training (if blank they haven't completed it).
# of Days to Complete from Campaign Assignment	This column counts how many days it took the employee to complete the training from when it was assigned.