Who has Entered Objectives on their 2013 ACES Forms?
& Exporting Data to Excel

I. Overview

The Dashboard provides instant up-to-date onscreen reports. The following dashboard report will allow you to track the progress of which managers have started entering objectives onto their 2013 ACES forms.

II. Updating Dashboard Settings for 2013 ACES Forms

> ***Note:*** *Unless you will need to toggle back to check the status of your 2012 ACES forms, you will only need to adjust the* ***Dashboard Filter Options*** *once during the 2013 ACES cycle.*

1. Login to ACES Online and click on the **Dashboard** 

button.
2. Click on  plus sign near **Filter Options** 

to expand the Filter Options screen.
   a) Under **Show:** field: ensure **Detailed Reporting Rights** is selected and **Starting from: Myself**
   Showing these levels: will appear if you have direct reports
   b) For **Include:** select **All Reporting Managers**
   c) Under **Process:** field: ensure **"2013 Forms"** is selected.
   d) Under **View:** field: click in the following check boxes:
      - Your **Secretariat**
      - Your **Agencies** [1]
      - **Form Type:** select:
        - **All Form types**
   e) Once all settings are selected, click on **Update** 

button. If you ever want to change which dept(s) you are viewing repeat process in d) above and select update.

   f) Click on  minus sign under 

Filter Options to close the window.

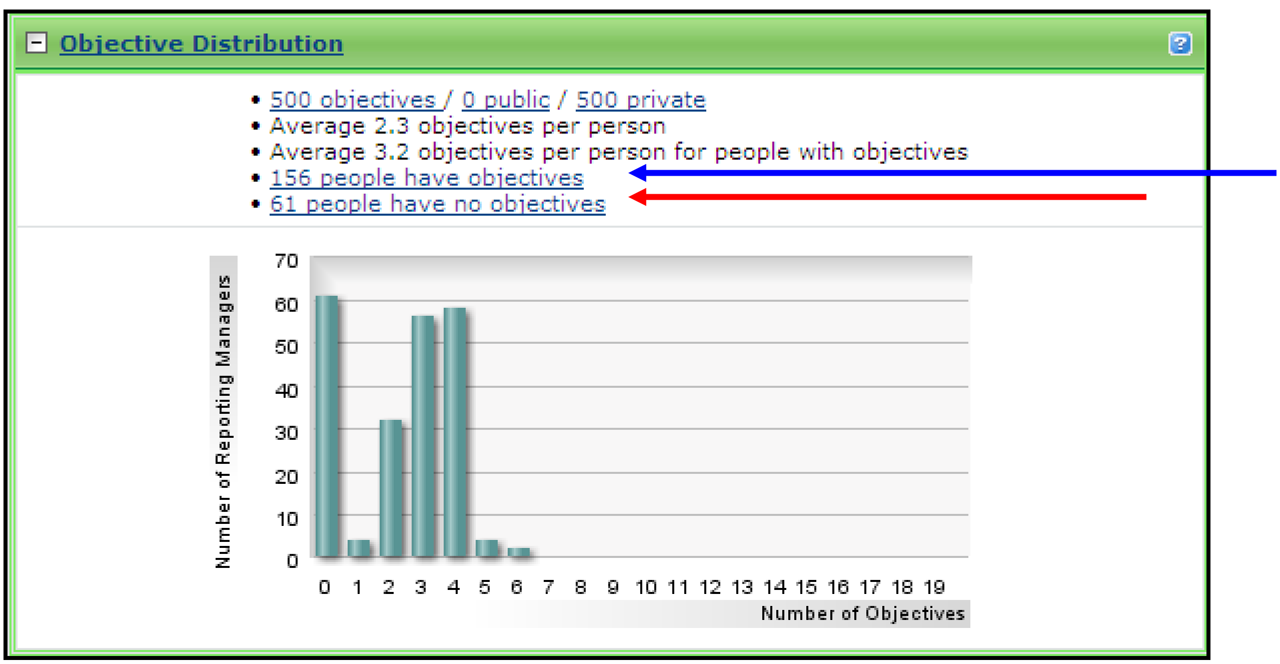
[1] Note: Security permissions are set by HRD; if you are missing permission for a particular department please contact ACES Help at HRD-DL-ACESHelp@massmail.state.ma.us

3. Click on plus sign near **Date Options** (to right of **Filter Options**) to open the **Date Options** screen.
   a) For **Current Period**, enter **Start Date: 10/01/2012** and **End Date: 09/30/2013**
   b) For **Previous Period**, enter **Start Date: 10/01/2011**and **End Date: 09/30/2012**
   c) Once all dates have been entered, click on **Update** button.
   d) Click on minus near **Date Options** to close the window.

4. The bottom half of the screen will read **Consolidated Reports Dashboards**.

5. To the right of **Last Updated Date & Time**, click on Update button to refresh the dashboard and to get the most recent dashboard information.

6. Review the **Objective Distribution** chart that appears on the screen below.
   - First bullet lists total number of 2013 objectives entered for the dept(s) you selected under the filter (on page 1 of this job aid).
   - The second bullet provides metrics on average number of 2013 objectives per manager
   - Bullet #4 provides number of managers who have at least one 2013 objective entered
   - Bullet #5 provides number of managers who do not have **ANY** 2013objectives entered

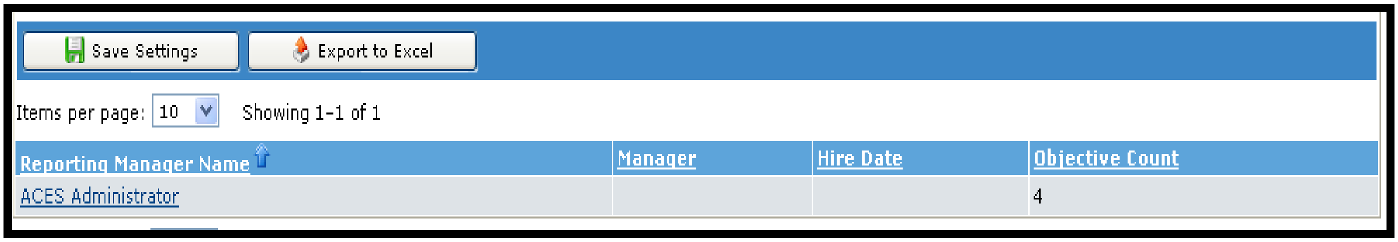


- You may click on bullet #4 (see **blue arrow** above) hyperlink to "drill down" and list the managers who have at least one objective.
- You may click on bullet #5 hyperlink (see **red arrow** above) to "drill down" and list the managers who don't have any objectives.

III. Sample ACES Data – Viewing those with Objectives and Managers with No Objectives

Using HRD’s Training account where we have test ACES forms, in the following example, we have clicked on bullet #4 hyperlink above to view those manager(s) who have at least one objective.

1 Manager with Objectives



Reporting Manager Name	Manager	Hire Date	Objective Count
ACES Administrator			4

In the example above, this manager has entered 4 objectives onto his form.

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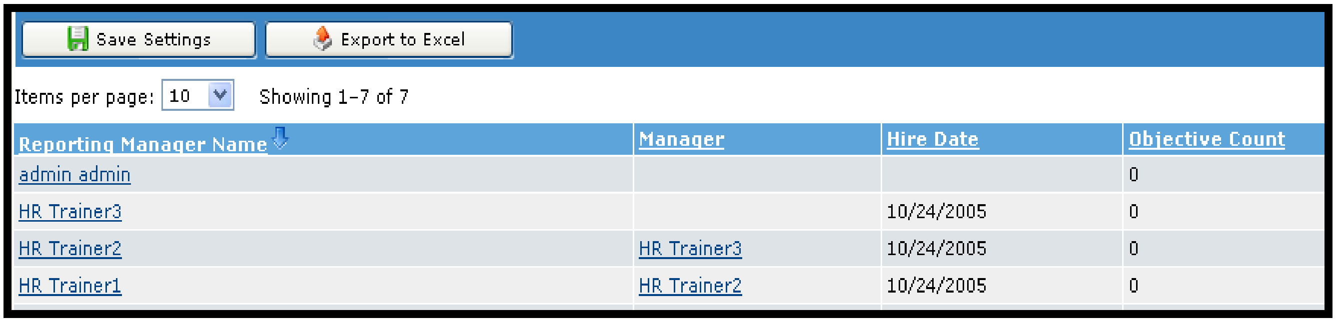
In the example that follows, we have clicked on bullet # 5 hyperlink which shows managers who have not entered any objectives into their ACES forms.

4 Managers with No Objectives Entered

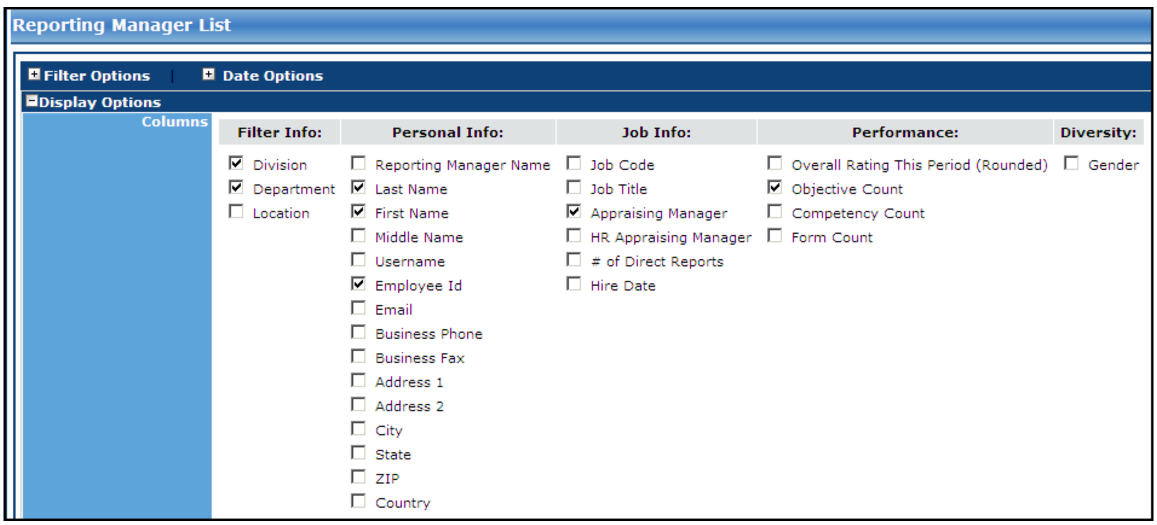


Reporting Manager Name	Manager	Hire Date	Objective Count
admin admin			0
HR Trainer3		10/24/2005	0
HR Trainer2	HR Trainer3	10/24/2005	0
HR Trainer1	HR Trainer2	10/24/2005	0

IV. Customize Your Data & Export Data to Excel

Anytime you **click** on **chart** to drill down, your screen will take you to the **Reports Screen** where you will be able to customize your data and export it to Excel.

1. Under **Display Options**,  click on plus  sign to expand the folder which will allow you select the fields you want listed in the report. Below are sample fields that you may find helpful in selecting:



2. After you have selected the data fields you want listed, you can click on the export to EXCEL button 

which will open a **File Download** window.

<u>Note:</u> After clicking “Export to Excel” you may receive a warning message indicating that Internet Explorer blocked the site from downloading files to your computer. Place cursor on yellow highlighted section, right click the mouse and choose “Download File”. Click again on **“Export to Excel”**

3. Click on **Open** to access the form data in an Excel worksheet, which can then be re-sorted.

4. Once in Excel, be sure to **Save** the file to your local drive.