- Click on the Reports Tab from the Success Factors Main Menu

- Click on the Analytics Tab from the Report Window

- Click on the List Views Option from the report Window

- Select the Forms List Report from the List Views Menu
1. The Setup screen for the forms list report will be displayed. This form has multiple sections. If the Filter option has a + next to it, click on the + to open the filter option to make changes. The screen will display as below. Items to be reviewed and changed as needed are:

- Show levels - make sure all that are displayed are checked
- Include - should read all employees

**Process – Univ Annual**

- View - Place checks in the column heading to select all that are displayed in View option: Service Line/Division…., Departments, Organization, Form Type, Sub Division, Class Code

![Diagram showing the Setup screen for the forms list report](image)

2. Next, open up the **Display options** by clicking on the – next to the title display option. This will show the Columns available to display on your report.

![Diagram showing the Display options](image)
How to generate a report to view all Review forms for your staff/department

3. To see what is in the content/status of the form, here are the items to select in order to run the report:

**Employee Information:**
- Employee Name
- Employee ID
- Supervisor

**Form Information:**
- Form Title

**Form Status:**
- Current Step
- Completion Status
- Due Date
- Past Due/Not Yet Due
- Last modified

4. Before processing your report, make sure the **Date Options** are set correctly. Again, click on the date options + to display the settings. To see Annual Reviews status and forms for 8/1/2009 – 7/31/2010, these dates should be entered in the start and end date fields

5. Next, click the **Update buttons** on the screen. This will pull the information for you to show it on the screen

6. You will be able to click on the form title of the review for each person in your list.