

Creating ePerformance documents by HR administrator using GroupID

This job aid will demonstrate how HR administrators can create ePerformance documents using an GroupID. The GroupID option allows you to create documents for all eligible employees that fall within the group (agency, department, etc.).

1. Navigate to Main Menu > Workforce Development > Performance Management > Performance Documents > Create Documents
2. On this page, click **Add a New Value**.

Create Documents

Enter any information you have and click Search. Leave fields blank for a list of all values.

[Find an Existing Value](#) [Add a New Value](#)

▼ **Search Criteria**

Run Control ID begins with ▾

Case Sensitive

[Search](#) [Clear](#) [Basic Search](#) [Save Search Criteria](#)

[Find an Existing Value](#) | [Add a New Value](#)

3. Type **DOCS1** in the Run Control ID field.

Create Documents

|

Run Control ID

[Find an Existing Value](#) | [Add a New Value](#)

4. Click **Add**.
5. Select desired **Period Begin Date**. For this example, select **07/01/2017**.
6. Select desired **Period End Date**. For this example, select **06/30/2018**.
7. Select desired **Document Type**. For this example, select **Annual Performance Review**.
8. Select desired **Template ID**. For this example, select **Annual Performance Review**.
9. Select **By Reports to Position** for **Manager Selection Method**.

Create Documents

Run Control ID | [Report Manager](#) | [Process Monitor](#) |

Run Request Parameters

Period Begin Date |
 Period End Date

Document Type ▾ |
 Template ID ▾

Manager Selection Method ▾

10. Click the radio button for **Group ID**.

Create Documents Using

Group ID
 Employee ID

11. In the next section, to select the correct **GroupID**, click the magnifying glass next to that field. The GroupIDs you have security access to will appear. If you do not see the GroupID associated with your agency or department, please contact HCM@sao.ga.gov for assistance. Otherwise, select the appropriate **GroupID**.

Look Up Group ID Help ▲

Group ID begins with ▾

Description begins with ▾

 Basic

Lookup

Search Results

View 100 First ◀ 1-41 of 41 ▶ Last

Group ID	Description
DOCORR	GA Dept. of Corrections
DOR	GA Department of Revenue
EP40351DOAS	Office of State Admin Hearings
EP40352DOAS	Treaasury & Fiscal Svcs
EP404AUDIT	Dept. of Audits
EP414EDU	Dept. of Education
EP416ERS	GA Employment Retirement Sys
EP422OPB	OPB
EP427DHR	DHR
EP440DOL	DOL
EP4415756DDC	Developmental Disabilities Co
EP441ATLR	EP441ATLR DBHDD
EP441ATLR11	EP441ATLR11 - DBHDD ATLR
EP441CSH	EP441CSH DBHDD CSH
EP441CSH11	EP441CSH11 - DBHDD CSH

12. Verify the **Description** for the GroupID given is correct.

Create Documents

Run Control ID: TESTePerf Report Manager Process Monitor Run

Run Request Parameters

Period Begin Date:
 Period End Date:

Document Type:

Manager Selection Method:

Template ID:

Create Documents Using

Group ID Employee ID

Documents Using Group ID

Personalize | Find | View All | |
First 1 of 1 Last

#	*Group ID	As Of Date	Description	Language Code
1	EP427DHR <input type="button" value="Q"/>	05/15/2017 <input type="button" value="B1"/>	DHR	<input type="button" value="+"/> <input type="button" value="-"/>

13. Click **Run**.

14. On the **Process Scheduler Request** panel, do not change any of the system defaults.

Process Scheduler Request

User ID: TNELSON Run Control ID: DOCS1

Server Name: Run Date: 05/02/2017

Recurrence: Run Time: 2:21:42PM

Time Zone:

Select	Description	Process Name	Process Type	*Type	*Format	Distribution
<input checked="" type="checkbox"/>	Mass Create Employee Documents	EP_MGRDOC	Application Engine	Web	TXT	Distribution

15. Click **OK**.

16. The **Process Instance number** should appear on the Create Document page. That confirms the process has been initiated.

Create Documents

Run Control ID: DOCS1 Report Manager Process Monitor

Process Instance: 932738

17. To View your Document Creation Results, navigate to Main Menu > Workforce Development > Performance Management > View Document Creation Results.

18. Click **Search** and select the same **Run Control ID** you used to create the documents.

19. The last document(s) you created under the **Run Control ID** should appear. The **Success** and **Status** sections will indicate if the documents were created successfully. If the documents were not created or an error is displayed, please contact hra@doas.ga.gov for assistance.

View Document Creation Results

Run Control ID DOCS1

Run Request Parameters

Period Begin Date 07/01/2017

Period End Date 06/30/2018

Document Type ANNUAL

Annual Performance Review

Manager Selection Method By Reports To Position

Create Documents Using

Group ID

Employee ID

Documents Using Employee ID

Employee Processed

Personalize | Find | | First 1 of 1 Last

Empl ID	Empl Record	Name	Template ID	Manager ID / Mentor ID	Supervisor Name	Success?	Status
1234xxx	0	Kristine [REDACTED]	Annual Performance Review	[REDACTED]	John [REDACTED]	Yes	Document created successfully

Save Return to Search Previous in List Next in List

20. END OF STEPS