

## Creating ePerformance documents by HR administrator using employee ID

This job aid will demonstrate how HR administrators can create ePerformance documents using an employee ID.

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

Find an Existing Value | Add a New Value

Run Control ID

Add

Find an Existing Value | Add a New Value

4. Click **Add**. 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 DOCS1      Report Manager    Process Monitor    Run

**Run Request Parameters**

Period Begin Date  BY     
 Period End Date  BY

Document Type  ▾     
 Template ID  ▾

Manager Selection Method  ▾

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

**Create Documents Using**

Group ID       Employee ID

11. Enter the employee ID in the **Empl ID** field. Tab thru the remaining fields to populate the employee name.

### Create Documents

Run Control ID: DOCS1      Report Manager      Process Monitor      [Run](#)

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**Run Request Parameters**

Period Begin Date:  📅      Period End Date:  📅  
 Document Type:       Template ID:   
 Manager Selection Method:

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**Create Documents Using**

Group ID       Employee ID

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**Documents Using Employee ID**

**Employees to Process**      [Personalize](#) | [Find](#) | [View All](#) | [📄](#) | [📄](#)      First 1 of 1 Last

| *Empl ID                                  | Empl Record                      | Name     | Language Code |
|---|----------------------------------|----------|---------------|
| 1 <input type="text" value="1234xxxx"/> 🔍 | <input type="text" value="0"/> 🔍 | Kristine |               |

[Save](#)   [Notify](#)      [Add](#)   [Update/Display](#)

12. If you do not know the empl ID, click the magnifying glass to perform a search. You can then search by **Name**.

### Look Up Empl ID

Empl ID  begins with ▾   
 Name  begins with ▾   
 Last Name  begins with ▾   
 Second Last Name  begins with ▾   
 First Name  begins with ▾   
 Alternate Character Name  begins with ▾

[Look Up](#)   [Clear](#)   [Cancel](#)   [Basic Lookup](#)

13. Verify the **Empl Record** is the correct.
14. Click **Run**.
15. 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 |

  

16. Click **OK**.
17. 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

18. To View your Document Creation Results, navigate to Main Menu > Workforce Development > Performance Management > View Document Creation Results.
19. Click **Search** and select the same **Run Control ID** you used to create the documents.

20. 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](mailto: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 |

21. END OF STEPS