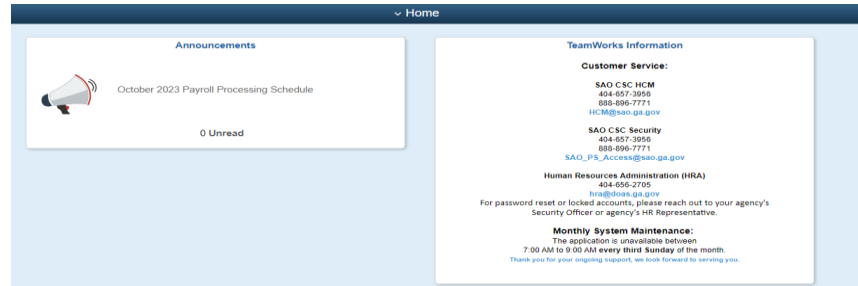# Creating E-Performance Checkpoint Documents by HR Administrator using Employee ID in TeamWorks

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

Users can run this process by searching for an existing Run Control ID or by adding a new value. Creating a Run Control ID that is relevant to the process may help users remember it for future use.

NOTE: Users will use the same Run Control ID when Viewing Document Creation Results, which is discussed in another job aid.

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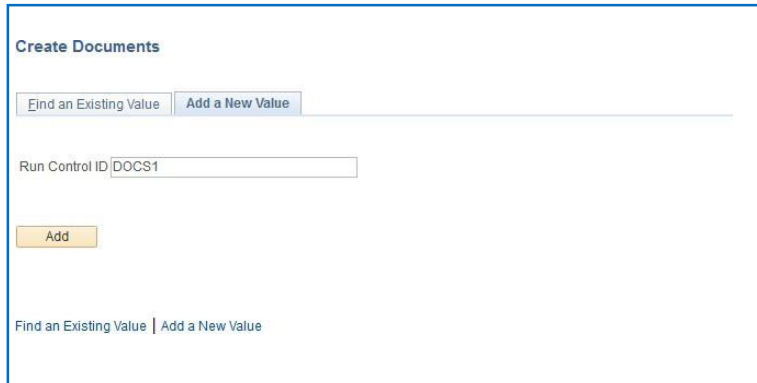
2. On this page, click **Add a New Value**

A **Run Control ID** is an identifier that, when paired with a User ID, uniquely identifies the process the user is running. The Run Control ID defines parameters to use when a process runs. This ensures that when a process runs in the background, the system does not prompt for additional values.
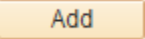
In this example, the user is adding a new **Run Control ID** titled **"DOCS1"**. It is important to make the **Run Control ID**

descriptive of the process. This is often more helpful to users because it is easy to remember it for future reference.
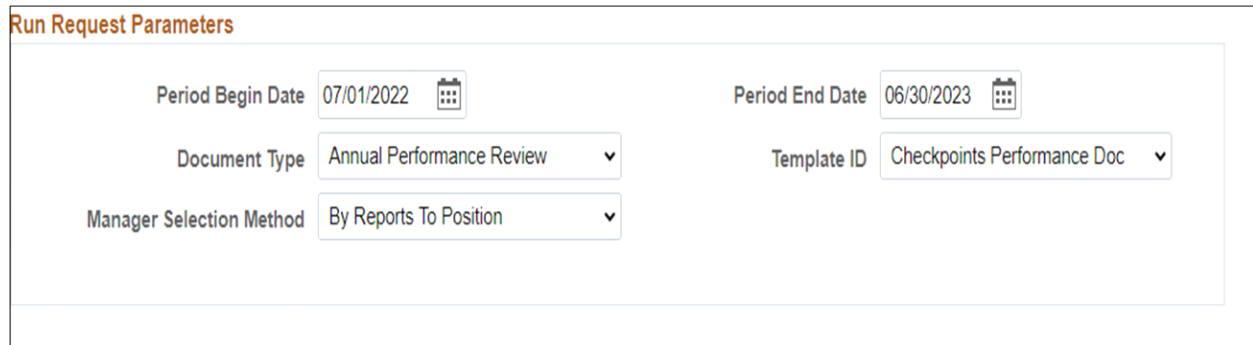
3. Type DOCS1 in the Run Control ID Field

Create Documents

Find an Existing Value | Add a New Value

Run Control ID DOCS1

Add

Find an Existing Value | Add a New Value

4. Click **Add**. Add

5. Select desired **Period Begin Date**. For this example, select **07/01/2022**.

6. Select desired **Period End Date**. For this example, select **06/30/2023**.

7. Select desired **Document Type**. For this example, select **Annual Performance Review**.

8. Select desired **Template ID**. For this example, select **Checkpoint Performance.**

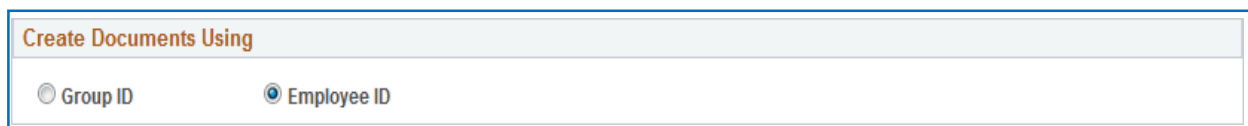9. Select **By Reports to Position** for **Manager Selection Method**.

Create Documents

Run Request Parameters

Period Begin Date	07/01/2022	Period End Date	06/30/2023
Document Type	Annual Performance Review	Template ID	Checkpoints Performance Doc
Manager Selection Method	By Reports To Position		

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

Create Documents Using

○ Group ID   ● Employee ID

11. Enter the "Empl ID" field. Tab thru the remaining fields to populate the employee's name.

Documents Using Employee ID

Employees to Process   Personalize | Find | View All | 🔲 | 📊   First ◀ 1 of 1 ▶ Last

	*Empl ID	Empl Record	Name	Language Code	
1	1234xxxx 🔍	0 🔍	Kristine -		➕ ➖

💾 Save   📧 Notify   ➕ Add   ✏️ Update/Display

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 Employee Record is correct.

14. Click **Save.**

💾 Save
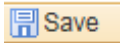
15. Click **Run.**

Run

16. On the **Process Scheduler Request** panel do not change any of the system

Process Scheduler Request

Help

User ID 00952586   Run Control ID DOCS1

Server Name [_____ ▼]   Run Date 10/14/2021 📅
Recurrence [_____ ▼]   Run Time 2:40:44PM   [Reset to Current Date/Time]
Time Zone [_____ 🔍]

Process List

Select	Description	Process Name	Process Type	*Type	*Format	Distribution
☑	Mass Create Employee Documents	EP_MGRDOC	Application Engine	Web ▼	TXT ▼	Distribution

[OK]   [Cancel]

17. Click **OK.**

18. The Process number should appear on the Create Document page. That confirms the process has been initiated.
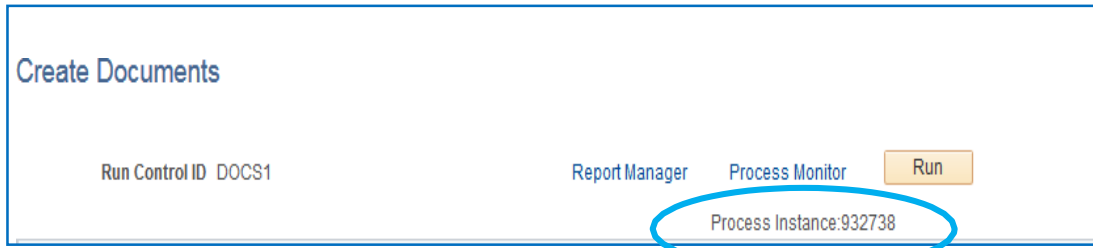
19. To view your **Document Creation Results**, navigate to the **Main Menu** >**Workforce Development** > **Performance Management** >View Document Creation Results.

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

21. 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, pleasecontact hra@doas.ga.gov for assistance.

22. End of Steps