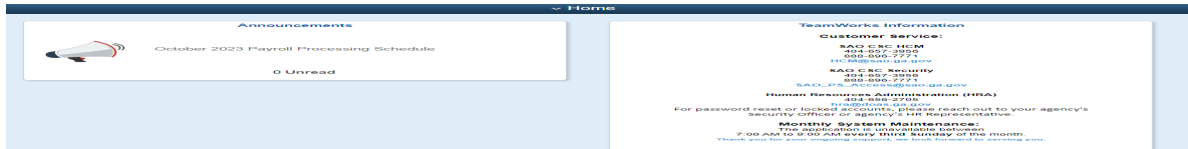


Creating ePerformance Checkpoint documents by HR Administrator using Group ID in Team Works



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

1. Navigate to Main Menu > Workcenters > Workforce Development Fluid > Performance Management > Create Documents

Users can run this process by searching for an existing Run Control ID or by adding a new value.

Note: Users will use the same run control ID when **Viewing Document Creation Results**, which is discussed in another topic.

2. On this page, click **Add a New Value**



The screenshot shows the 'Create Documents' form. At the top, there are two buttons: 'Find an Existing Value' and 'Add a New Value'. Below these is a text input field labeled 'Run Control ID'. Underneath the input field is an 'Add' button. At the bottom of the form, there are links for 'Find an Existing Value' and '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.

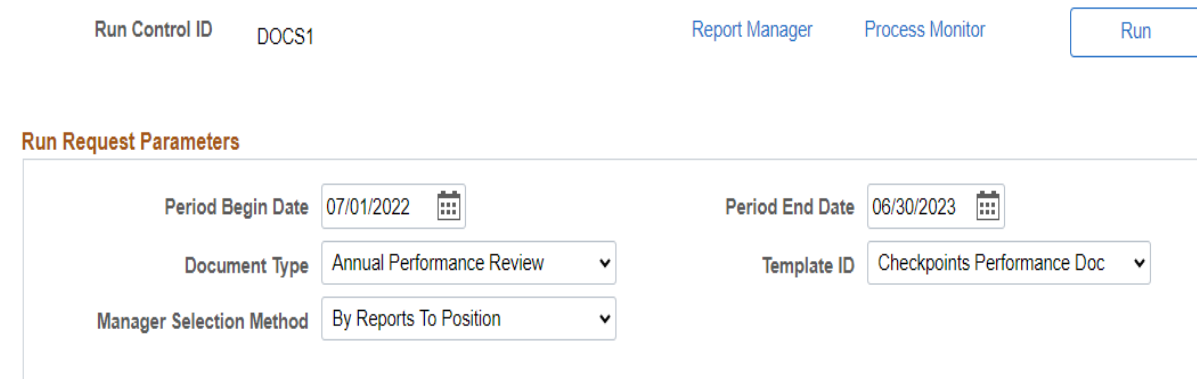
3. Type **DOCS1** in the Run Control ID Field



The screenshot shows a web form titled "Create Documents". At the top, there are two buttons: "Find an Existing Value" and "Add a New Value". Below these is a text input field labeled "Run Control ID" containing the text "DOCS1". Underneath the input field is a yellow "Add" button. At the bottom of the form, there are two more buttons: "Find an Existing Value" and "Add a New Value".

4. Click **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 **Checkpoint Performance Doc**.
8. Select desired **Template ID**. For this example, select **Annual Performance Review**.
9. Select **By Reports to Position** for

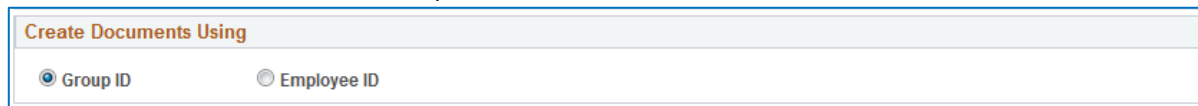
Create Documents



The screenshot shows the "Create Documents" form with the "Run Request Parameters" section expanded. The "Run Control ID" field is set to "DOCS1". There are buttons for "Report Manager", "Process Monitor", and "Run". The "Run Request Parameters" section contains the following fields:

- Period Begin Date: 07/01/2022 (with a calendar icon)
- Period End Date: 06/30/2023 (with a calendar icon)
- Document Type: Annual Performance Review (dropdown menu)
- Template ID: Checkpoints Performance Doc (dropdown menu)
- Manager Selection Method: By Reports To Position (dropdown menu)

10. Click the radio button for Group ID

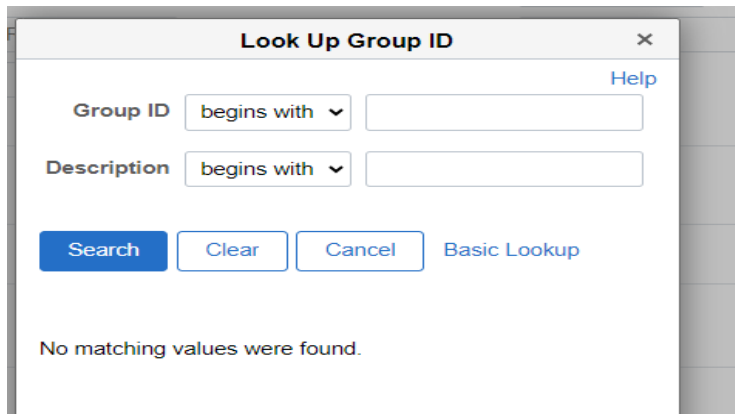


The screenshot shows the "Create Documents Using" section of the form. It contains two radio buttons: "Group ID" (which is selected) and "Employee ID".

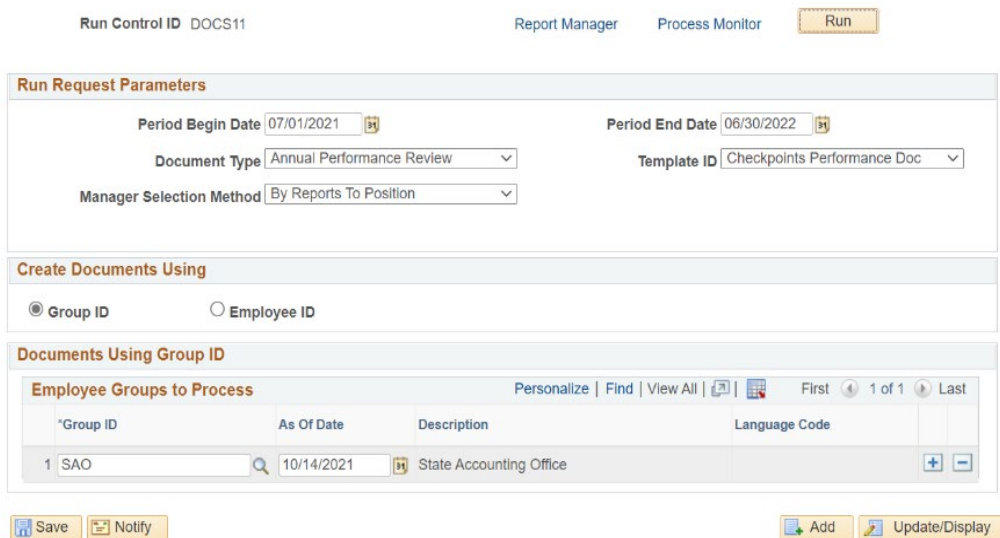
11. In the next section, to select the correct **Group ID**, click the magnifying glass next to that field. The Group IDs you have security access will appear. If you do not see

Creating ePerformance Checkpoint documents by HR Administrator using Group ID | Prepared by DOAS/HRA

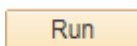
the Group ID associated with your agency or department, please contact HCM@sao.ga.gov for assistance. Otherwise, select the appropriate **Group ID**.



12. Verify the **Description** for the Group ID given is correct.



14. Click **Run**.



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

Process Scheduler Request Help

User ID 00952586 Run Control ID DOCS1

Server Name Run Date 10/14/2021

Recurrence Run Time 2:40:44PM

Time Zone

Process List

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

This number is a unique ID number assigned to each process that helps users identify the process when reviewing process status on the **Process Monitor** page.

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 was displayed, please contact hra@doas.ga.gov for assistance.

View Document Creation Results

Run Control ID DOCS1

Run Request Parameters	
Period Begin Date	07/01/2021
Period End Date	06/30/2022
Document Type	ANNUAL
Annual Performance Review	
Manager Selection Method	By Reports To Position

Create Documents Using
<input type="radio"/> Group ID <input checked="" type="radio"/> Employee ID

Documents Using Employee ID							
Employee Processed							
Empl ID	Empl Record	Name	Template ID	Manager ID / Mentor ID	Supervisor Name	Success?	Status
01119339	0	Antonio Cummings	Checkpoints Performance Doc	00952586	Dawn Jenkins	Yes	Document created successfully

21. End of Steps