

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

Find an Existing Value

Add a New Value

Run Control ID

DOCS1

Add

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

DOCS1

Report Manager

Process Monitor

Run

Run Request Parameters

Period Begin Date

07/01/2017

31

Period End Date

06/30/2018

31

Document Type

Annual Performance Review

▾

Template ID

Annual Performance Review

▾

Manager Selection Method

By Reports To Position

▾

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

Look Up Clear Cancel 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

07/01/2017

Period End Date

06/30/2018

Document Type

Annual Performance Review

Template ID

Annual Performance Review

Manager Selection Method

By Reports To Position

Create Documents Using

☒ Group ID

☐ Employee ID

Documents Using Group ID

Employee Groups to Process

Personalize

Find

View All

First

1 of 1

Last

*Group ID	As Of Date	Description	Language Code
1 EP427DHR	05/15/2017	DHR	

Save

Return to Search

Previous in List

Next in List

Notify

Add

Update/Display

13. Click **Run**.

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

Process Scheduler Request

Help

User ID TNELSON

Run Control ID DOCS1

Server Name

Run Date

05/02/2017

BT

Recurrence

Run Time

2:21:42PM

Reset to Current Date/Time

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

OK

Cancel

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

Run

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	Annual Performance Review		John	Yes	Document created successfully

 Save Return to Search Previous in List Next in List**20. END OF STEPS**