Overview/Description
This job aid provides step-by-step instructions on how the Practitioner navigates to Create Documents for the ePerformance Process.

Practitioners with the BOR ePerformance HR Admin role, will be the individuals Creating Documents (i.e. Provisional Performance Evaluations and Annual Performance Evaluations) for the ePerformance Process.

Prerequisite(s)
N/A

Instructions
1. Create Documents for provisional performance evaluation.

Navigation
Navigator > Workforce Development > Performance Management > Performance Documents > Create Documents

1.1. Run Control ID

Run the Create Documents process by searching for an existing run control ID or adding a new value.

A Run Control ID is an identifier that, when paired with your user ID, uniquely identifies the process you are running. The run control ID defines parameters to be used when a process is run. This ensures that when a process runs in the background, the system does not prompt you for additional values.

a. Creating a run control ID that is relevant to the process may help you to remember it for future use. Click Add a New Value.
b. The **Run Control ID** should follow the below naming convention:

<table>
<thead>
<tr>
<th>Performance Year</th>
<th>School</th>
<th>Template</th>
<th>Run Control ID Example</th>
</tr>
</thead>
<tbody>
<tr>
<td>FY20</td>
<td>Kennesaw</td>
<td>Leadership</td>
<td>FY20KSULeadershipTemplate</td>
</tr>
<tr>
<td>2019-2020</td>
<td>Kennesaw</td>
<td>Staff</td>
<td>20192020KSUStaffTemplate</td>
</tr>
</tbody>
</table>

c. Enter the Run Control ID into the **Run Control ID** field and click **Add**.

1.2. **Run Request Parameters** for provisional review performance evaluation view.

a. Use the Create Documents page to enter the request parameters. These parameters will be used to define the processing rules and data to be included when the process is run.

- **Period Begin and End Date**: Enter the begin and end dates of the period of time that the ePerformance documents will cover.
- **Document Type**: Defined by the type of ePerformance Review conducting.
- **Template ID**: Select Institutional template.
- **Manager Selection Method**: Select “By Reports To Position.”
1.3. **Create Documents Using** Employee ID.

Select **Employee ID**.

![Create Documents Using Employee ID](image1)

1.4. **Documents Using Employee ID – Employees to Process.**

a. Employees receiving ePerformance Evaluations should be listed by **Empl ID** (Employee ID) and the correct **Empl Record**, if there are multiple.

![Employees to Process](image2)

b. After the correct request parameters have been selected, click **Run**.

![Create Documents](image3)

c. The **Process Schedule Request** will appear. The fields in the **Process Schedule Request** will default to the appropriate selections and will not need to be defined unless **Server Name** and **Process Output** format parameters need to be updated. If you use the same **Run Control ID** for subsequent processes, the **Server Name** that you last used will be supplied by default in this field.

![Process Schedule Request](image4)

d. Click **Ok**.
e. Once you click **Ok**, notice that the **Process Instance** number appears. This number helps you identify the process you have run when you check the status.

f. Click the **Process Monitor** link.

![Process Monitor](image)

g. Use the **Process List** or **Details** link to view the status of submitted process requests.

h. The process is finished when the status is “Success.”

i. Click **Refresh** until the status is “Success.” You can now view the document creation results.

![Create Documents](image)
2. View Document Creation Results.

Navigation

Navigator > Workforce Development > Performance Management > View Document Creation Results

a. Enter the desired information into the Run Control ID field. Enter a valid value e.g. "20192020KSULeadershipTemplate" and click Search.

b. The View Document Creation Results page will show a list of Manager performance documents that were successfully created as well as all documents that were not created. A listing of all employees whose EMPL ID was specified in the search parameters appear. The Success? column displays "Yes" if the Manager document was created successfully for the employee. Otherwise, it displays "No".

Practitioners with the BOR ePerformance HR Admin role have successfully Created Documents (i.e. Provisional Performance Evaluations and Annual Performance Evaluations) for the ePerformance Process. The Manager can now view performance documents.

3.1. Search for Documents.

Navigation

Navigator > Workforce Development > Performance Management > Performance Documents > View Documents

a. Select the search parameters for the employee(s) completing a Performance Evaluation and click Search.

b. After searching all the documents for which you have access, within that criteria will be Performance Documents (i.e. Provisional Performance Evaluations and Annual Performance Evaluations) for the Employee(s).

c. Click on the employee’s Name in the Performance Documents list above to start the Performance Process for the Performance Evaluation document type selected.
3.2. **Annual** Review Performance Evaluation View.

3.3. **Provisional** Review Performance Evaluation View.