Creating Documents as an ePerformance Administrator

ePERFORMANCE ADMINISTRATOR

Revised: 7/16/2018
Creating Documents as an ePerformance Administrator

Creating a performance document as the ePerformance Administrator is a variation on the standard method that the Manager (Rater) uses to create documents for only the employees he/she supervises. This process allows for higher levels of consistency and accuracy by utilizing standard parameters for all documents created during a performance cycle.

It involves scheduling a background process which will generate documents for either a defined group of employees or individual employees. Performance documents can be created for any review period date range and for all three (3) performance document types (Probationary, Annual, Ad Hoc) and associated templates.

Creating Documents for a Defined Group of Employees via a Group ID

The process is similar for creating performance reviews, whether it is by individual employee or by Group. Creating documents by a Group has an extra step at the beginning of the process. When using the Group ID feature, a Group must be created in HCM first.

**NOTE:** The “Group” is the population of employees whose evaluations would be created during this process. To request that the group be created, outline the criteria that would make up a Group using the *Group Definition Template* and send the completed *Template* to ePerformance@das.ohio.gov. Typically, the group criteria will match what has been used to determine the group’s cycle date configuration. One example of a Group could be:

- Agency = DAS
- Appointment Type = Permanent
- Bargaining unit = C03, CO4

Another example could be:

- Agency = DRC
- Appointment Type = Permanent
- Bargaining unit = C03, C04, C05, C06, C07, C09, C14
- Job Code = 46531


1. ePerformance Administrator navigates to: myOhio > Quick Icons (Four-Square symbol) > HCM > Launch App > Main Menu > Workforce Development > Performance Management > Performance Documents > Create Documents.

![Image of ePerformance Administrator interface]

2. Click the **Add a New Value** tab. Enter a Run Control ID, then click the **Add** button.

![Image of Create Documents interface]

**NOTE**: The Run Control ID should include the name of the Group (e.g., NR_DAS_EX would be the ePerformance Administrator’s initials, the agency and Exempt Group). This makes it much easier to locate the process for validation after the process is completed. Be sure to keep track of the name of each Run Control ID used for easy reference when searching.
3. Complete the following fields under the Run Request Parameters:
   - Period Begin Date
   - Period End Date
   - Document Type
   - Template ID
   - Manager Selection Method: **By Reports To Position** *(ALWAYS select this option)*, which creates documents using the existing Reports To structure

4. Select the **Group ID** radio button.

5. Enter the Group ID in the **Group ID** field, which will be provided from DAS’ ePerformance team. **NOTE**: The Group ID must already be created.

   Confirm that the **As Of Date** is correct (it will default to the current date).
6. Click the **Run** button.

7. Click the **OK** button.
8. Click the **Process Monitor** hyperlink.

9. Continue to click the **Refresh** button until the Run Status column displays **Success** for the EP_MGRDOC process. Because the Group ID can create large numbers of documents, the processing time may be lengthy.
Accessing the Process Monitor

Process Monitor

When creating large numbers of documents, it is not necessary to continually refresh the Process Monitor. The process will still run if you log out of myOhio and check on its status later.

Follow these steps to directly access the Process Monitor.

1. ePerformance Administrator navigates to: myOhio > Quick Icons (Four-Square symbol) > HCM > Launch App > Main Menu > PeopleTools > Process Schedule > Process Monitor.

2. Your State of Ohio User ID will populate in the User ID field. Enter the number of days to look back on in the Days field, then click the Refresh button.
10. To ensure the document creation was successful, navigate to **Main Menu > Workforce Development > Performance Management > View Document Creation Results** and enter the Run Control ID previously used during document creation. Click the **Search** button.

![View Document Creation Results](image)

To access the Process Monitor, follow these steps:

3. The EP_MGRDOC process will be listed.

4. Continue to click the **Refresh** button until the process achieves the Run Status of **Success**.

![Process Monitor](image)

**Accessing the Process Monitor**

**Process Monitor (Cont’d)**

- The EP_MGRDOC process will be listed.
- Continue to click the **Refresh** button until the process achieves the Run Status of **Success**.
11. The **View Document Creation Results** page displays a list of documents that were created as a result of the EP_MGRDOC process. The Status column indicates that the documents were created successfully.

![View Document Creation Results](image)

12. The document(s) can be viewed by navigating to **Main Menu > Workforce Development > Performance Management > Performance Documents > View Documents**.

13. Enter the employee’s First and Last Name into the search criteria and click the **Search** button.

![View Performance Documents](image)
14. Select the **Document Type** hyperlink (ANNUAL REVIEW) and the Document Details page will display.
Creating Documents for a Selected Employee(s)

1. ePerformance HR Admin navigates to: myOhio > Quick Icons (Four-Square Icon) > HCM > Launch App > Main Menu > Workforce Development > Performance Management > Performance Documents > Create Documents.

2. Click the Add a New Value tab. Enter a Run Control ID, then click the Add button.

NOTE: It is a best practice to enter a unique Run Control ID to match the criteria that will be used to determine the employee or Group that will be used in this document creation process.

For example, if creating a document for an individual employee, enter your initials and employee’s State of Ohio User ID (e.g., NR_10004321).

Be sure to keep track of the name of each Run Control ID used for easy reference when searching for the job.
3. Enter the following under the Run Request Parameters:
   - Period Begin Date
   - Period End Date
   - Document Type
   - Template ID
   - Manager Selection Method: **By Reports To Position (Always select this option)**, which creates documents using the existing Reports To structure

4. Select the **Employee ID** radio button.

5. Enter the Employee ID in the **EmplID** field under **Employees to Process** and click **Enter**.

6. To add additional employees, click the + sign. **NOTE:** Each employee added will have a document created using the same Period Begin and End dates and Document Type and Template.
7. Enter another employee ID and click **Enter**.

In this screenshot, an Annual Review document will be created for Jane Smith for the period of 07/01/2018 through 06/30/2019.
8. Click the **Run** button.

9. On the Process Scheduler page, click the **OK** button.
10. Click the Process Monitor hyperlink.

11. Continue to click the Refresh button until Run Status shows Success.
12. To ensure the document creation was successful, navigate to `Main Menu > Workforce Development > Performance Management > View Document Creation Results` and enter the Run Control ID previously used during document creation. Click the `Search` button.

13. The View Document Creation Results page will display the document creation status.
14. The document can be viewed by navigating to **Main Menu > Workforce Development > Performance Management > Performance Documents > View Documents**.

15. Enter the employee’s First and Last Name into the search criteria fields and click the **Search** button.

16. Click the **Document Type** hyperlink (ANNUAL REVIEW) and the Document Details page will display.
Possible Errors in the Status Column

The *Status* column will indicate whether the documents were created successfully or if an error occurred during the process.

The Status **Invalid or missing input parameter** displays when the employee’s supervisor position is vacant. The document was not created during the process and will need to be manually created.

```
<table>
<thead>
<tr>
<th>Employee Groups Processed</th>
<th>Template ID</th>
<th>MyID / MUID</th>
<th>Supervisor Name</th>
<th>Success?</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>ANNUAL PERFORMANCE REVIEW</td>
<td></td>
<td></td>
<td>No</td>
<td>Invalid or missing input parameter</td>
</tr>
<tr>
<td></td>
<td>ANNUAL PERFORMANCE REVIEW</td>
<td></td>
<td></td>
<td>No</td>
<td>Invalid or missing input parameter</td>
</tr>
<tr>
<td></td>
<td>ANNUAL PERFORMANCE REVIEW</td>
<td></td>
<td></td>
<td>No</td>
<td>Invalid or missing input parameter</td>
</tr>
</tbody>
</table>
```

The Status **Document already exists** displays when there is already a document with the same document type in the system for that employee during the same period dates. A new document will not be created.

```
<table>
<thead>
<tr>
<th>Employee Groups Processed</th>
<th>Template ID</th>
<th>MyID / MUID</th>
<th>Supervisor Name</th>
<th>Success?</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>ANNUAL PERFORMANCE REVIEW</td>
<td></td>
<td></td>
<td>No</td>
<td>Document already exists.</td>
</tr>
</tbody>
</table>
```