

Creating Documents as an ePerformance Administrator

ePERFORMANCE ADMINISTRATOR

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.

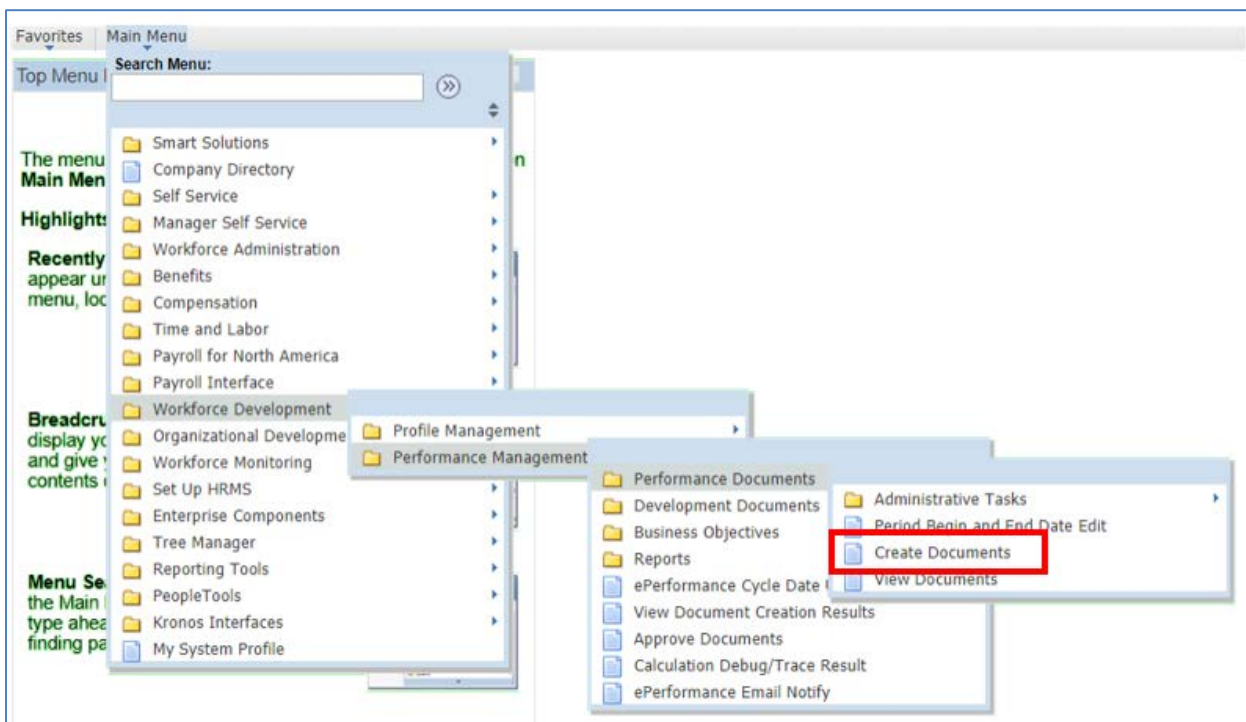
NOTE: The “Group” is the population of employees whose evaluations would be created during this process. To request that the group be created, outline the criteria that would make up a Group using the *Group Definition Template* and send the completed *Template* to ePerformance@das.ohio.gov. Typically, 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, C04

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](#).



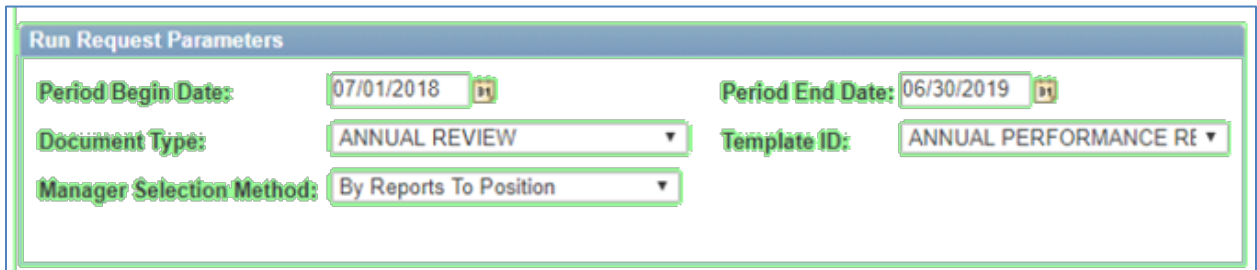
2. Click the [Add a New Value](#) tab. Enter a Run Control ID, then click the [Add](#) button.

A screenshot of the 'Create Documents' form. At the top, there are two tabs: 'Find an Existing Value' and 'Add a New Value'. The 'Add a New Value' tab is selected. Below the tabs, there is a text input field labeled 'Run Control ID:' with the value 'NR_DAS_EX' entered. At the bottom left, there is a button labeled 'Add' which is highlighted with a red box.

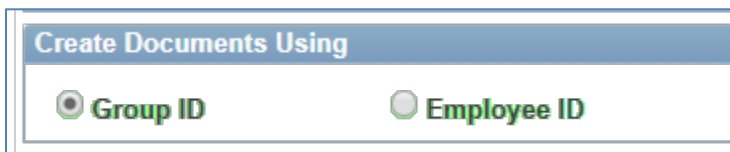
NOTE: The Run Control ID should include the name of the Group (e.g., NR_DAS_EX would be the ePerformance Administrator's initials, the agency and Exempt Group). This makes it much easier to locate the process for validation after the process is completed. Be sure to keep track of the name of each Run 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)



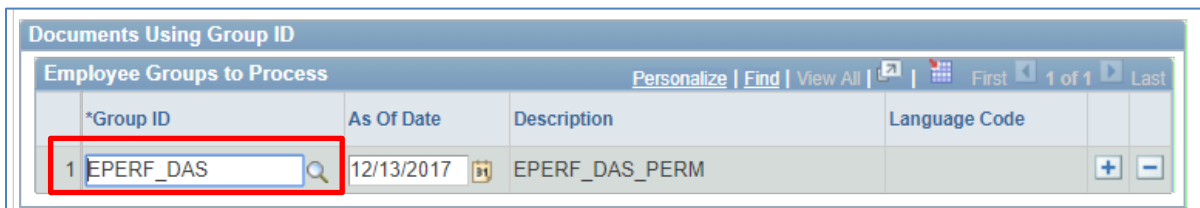
Run Request Parameters	
Period Begin Date:	07/01/2018
Period End Date:	06/30/2019
Document Type:	ANNUAL REVIEW
Template ID:	ANNUAL PERFORMANCE RE
Manager Selection Method:	By Reports To Position

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

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

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).



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 EPERF_DAS	12/13/2017	EPERF_DAS_PERM	

6. Click the **Run** button.

Create Documents

Run Control ID: NR_DAS_EX [Report Manager](#) [Process Monitor](#) **Run**

Run Request Parameters

Period Begin Date: 07/01/2018 Period End Date: 06/30/2019

Document Type: ANNUAL REVIEW Template ID: ANNUAL PERFORMANCE R

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	EPERF_DAS	12/13/2017	EPERF_DAS_PERM		

Save Notify Add Update/Display

7. Click the **OK** button.

Process Scheduler Request

User ID Run Control ID NR_DAS_EX

Server Name Run Date 12/13/2017

Recurrence Run Time 4:25:46PM

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

8. Click the [Process Monitor](#) hyperlink.

Create Documents

Run Control ID: NR_DAS_EX [Report Manager](#) [Process Monitor](#) [Run](#)

Run Request Parameters

Period Begin Date: 07/01/2018 Period End Date: 06/30/2019
Document Type: ANNUAL REVIEW Template ID: ANNUAL PERFORMANCE R
Manager Selection Method: By Reports To Position

Create Documents Using

☒ Group ID ☐ Employee ID

Documents Using Group ID

*Group ID	As Of Date	Description	Language Code
1 EPERF_DAS	12/13/2017	EPERF_DAS_PERM	

[Save](#) [Notify](#) [Add](#) [Update/Display](#)

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.

Process List

View Process Request For

User ID: Type: Last: 1 Days [Refresh](#)
Server: Name: Instance From: Instance To:
Run Status: Distribution Status: ☐ Save On Refresh

Process List

Select	Instance	Seq.	Process Type	Process Name	User	Run Date/Time	Run Status	Distribution Status	Details
<input type="checkbox"/>	3702096		Application Engine	EP_MGRDOC		12/13/2017 4:25:46PM EST	Success	Posted	Details

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.

Process List

View Process Request For

User ID Type Last 1 Days Refresh

Server Name Instance From Instance To

Run Status Distribution Status Save On Refresh

Select	Instance	Seq.	Process Type	User	Run Date/Time	Run Status	Distribution Status
<input type="checkbox"/>							

Save Notify

Accessing the Process Monitor

Process Monitor (Cont'd)

3. The EP_MGRDOC process will be listed.

The screenshot shows the 'Process Monitor' window with the 'Process List' tab selected. The 'View Process Request For' section includes filters for User ID, Type, Last, Days, Server, Name, Instance From, Instance To, Run Status, and Distribution Status. A 'Refresh' button is present. Below the filters is a table titled 'Process List' with columns: Select, Instance, Seq, Process Type, Process Name, User, Run Date/Time, Run Status, Distribution Status, and Details. Two rows are visible, both for 'EP_MGRDOC' processes, with the first row highlighted in yellow and the second row in white. The first row has a 'Run Status' of 'Success' and a 'Distribution Status' of 'Posted'.

Select	Instance	Seq	Process Type	Process Name	User	Run Date/Time	Run Status	Distribution Status	Details
<input checked="" type="checkbox"/>	3931324		Application Engine	EP_MGRDOC		03/19/2018 11:05:20AM EDT	Success	Posted	Details
<input type="checkbox"/>	3931315		Application Engine	EP_MGRDOC		03/19/2018 10:31:25AM EDT	Success	Posted	Details

4. Continue to click the [Refresh](#) button until the process achieves the Run Status of *Success*.

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.

The screenshot shows the 'View Document Creation Results' window. It includes a search bar with the text 'Find an Existing Value'. Below it is a 'Search Criteria' section with a dropdown menu set to 'begins with' and a text input field containing 'NR_DAS_EX'. There is a 'Case Sensitive' checkbox and a 'Limit the number of results to (up to 300):' field with the value '300'. At the bottom, there is a 'Search' button (highlighted with a red box), a 'Clear' button, and links for 'Basic Search' and 'Save Search Criteria'.

11. The [View Document Creation Results](#) page displays a list documents that were created as a result of the EP_MGRDOC process. The Status column indicates the documents were created successfully.

View Document Creation Results

Run Control ID: NR_DAS_EX

Run Request Parameters

Period Begin Date: 07/01/2018 Period End Date: 06/30/2019
Document Type: ANNUAL ANNUAL REVIEW
Manager Selection Method: By Reports To Position

Create Documents Using

Group ID Employee ID

Documents Using Group ID

Results

Group ID: EPERF_DAS EPERF_DAS_PERM

Empl ID	Empl Record	Name	Template ID	MgrID / MtrID	Supervisor Name	Success?	Status
	0		ANNUAL PERFORMANCE REVIEW			Yes	Document created successfully
	0		ANNUAL PERFORMANCE REVIEW			Yes	Document created successfully
	0		ANNUAL PERFORMANCE REVIEW			Yes	Document created successfully

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

Use the Search capabilities to find a specific document or documents to view. Listed below will be all the documents for which you have access within that criteria

Search for Documents

Employee First Name: Jane Last Name: Smith
Manager First Name: Last Name:
Document Type: ANNUAL REVIEW Status:
Period Between: 07/01/2018 06/30/2019

Search Clear

14. Select the [Document Type](#) hyperlink (ANNUAL REVIEW) and the Document Details page will display.

View Performance Documents

Document Details

EMPLOYEE NAME Human Capital Mgt Sr Analyst
ANNUAL REVIEW: 07/01/2018 - 07/31/2018

Performance Document Details

Employee:	EMPLOYEE NAME	Job Title:	Human Capital Mgt Sr Analyst
Document Type:	ANNUAL REVIEW	Period:	07/01/2018 - 07/31/2018
Template:	ANNUAL PERFORMANCE REVIEW	Document ID:	256839
Manager:	SUPERVISOR NAME	Status:	In Progress

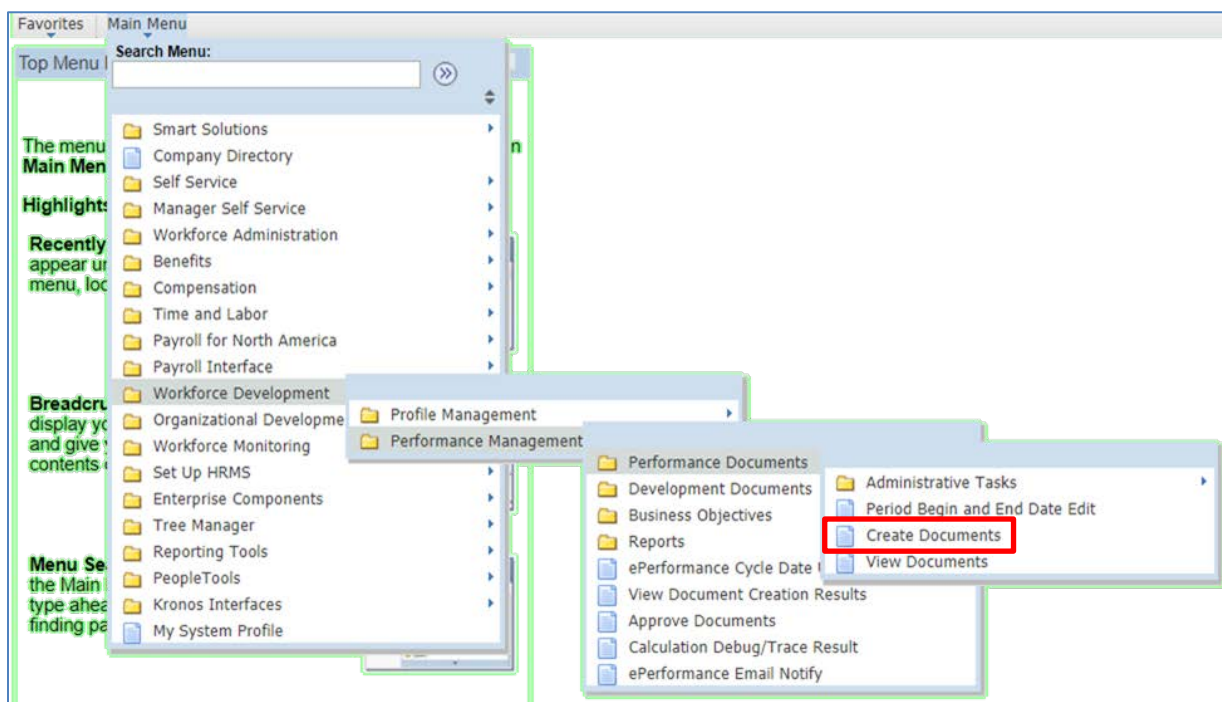
Document Progress

Step		Status	Due Date
Establish Evaluation Criteria	<input type="radio"/>	Not Started	09/29/2017
Nominate Participants	<input type="radio"/>	Not Started	07/01/2018
Track Nominations	<input type="radio"/>	Not Started	07/01/2018
Review Participant Evaluations	<input type="radio"/>	Not Started	07/01/2018
Review Self Evaluation	<input type="radio"/>	Not Started	07/01/2018
Review Manager Evaluation	<input type="radio"/>	Not Started	07/16/2018

[Return to Select Documents](#)

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.

Create Documents

[Find an Existing Value](#) [Add a New Value](#)

Run Control ID:

[Add](#)

[Find an Existing Value](#) | [Add a New Value](#)

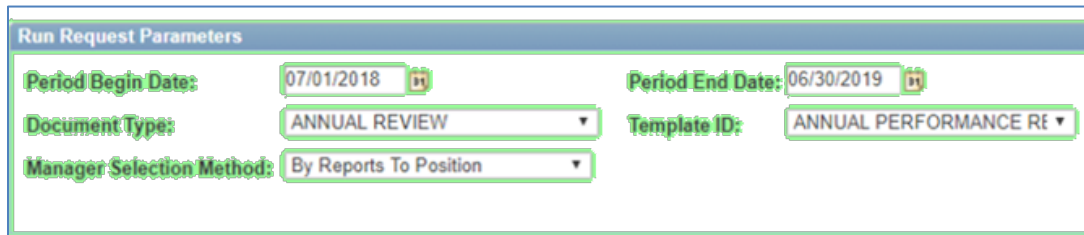
NOTE: It is a best practice to enter a unique Run Control ID to match the criteria that will be used to determine the employee or Group that will be used in this document creation process.

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.

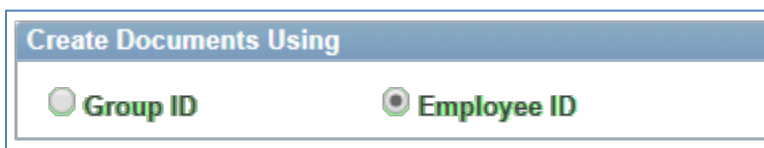
3. Enter the following under the Run Request Parameters:

- 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)



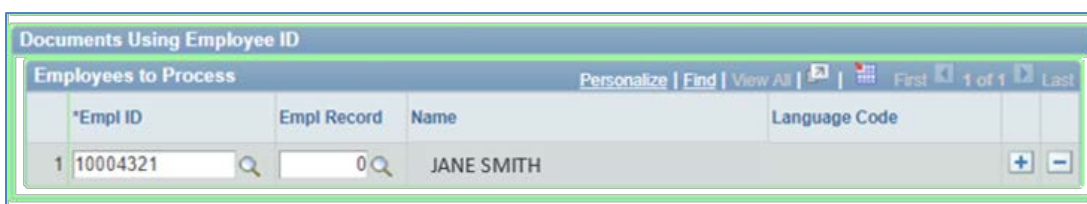
Run Request Parameters

Period Begin Date: 07/01/2018
Period End Date: 06/30/2019
Document Type: ANNUAL REVIEW
Template ID: ANNUAL PERFORMANCE RE
Manager Selection Method: By Reports To Position

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

Create Documents Using

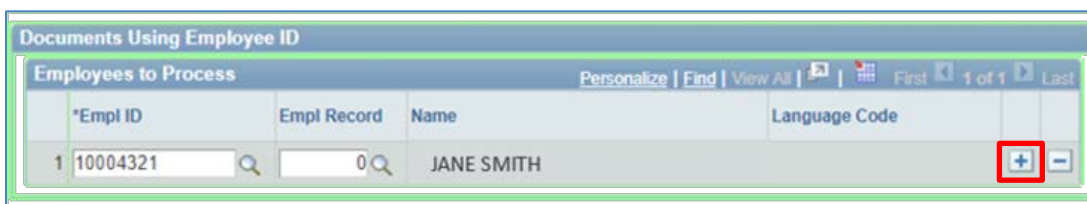
☐ Group ID ☒ Employee ID

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

Documents Using Employee ID

Employees to Process

*Empl ID	Empl Record	Name	Language Code
1 10004321	0	JANE SMITH	

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.

Documents Using Employee ID

Employees to Process

*Empl ID	Empl Record	Name	Language Code
1 10004321	0	JANE SMITH	

- Enter another employee ID and click **Enter**.

Documents Using Employee ID				
Employees to Process				
	*Empl ID	Empl Record	Name	Language Code
1	10004321	0	JANE SMITH	
2	11112222	0	DEIDRE HALL	

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

Create Documents

Run Control ID: NR_10004321

[Report Manager](#)
[Process Monitor](#)
[Run](#)

Run Request Parameters

Period Begin Date: 07/01/2018
 Period End Date: 06/30/2019

Document Type: ANNUAL REVIEW
 Template ID: ANNUAL PERFORMANCE RE

Manager Selection Method: By Reports To Position

Create Documents Using

☐ Group ID
 ☒ Employee ID

Documents Using Employee ID

Employees to Process				
	*Empl ID	Empl Record	Name	Language Code
1	10004321	0	JANE SMITH	

[Save](#)
[Notify](#)
[Add](#)
[Update/Display](#)

8. Click the **Run** button.

Create Documents

Run Control ID: NR_10004321 [Report Manager](#) [Process Monitor](#) [Run](#)

Run Request Parameters

Period Begin Date: 07/01/2018 Period End Date: 06/30/2019

Document Type: ANNUAL REVIEW Template ID: ANNUAL PERFORMANCE RE

Manager Selection Method: By Reports To Position

Create Documents Using

☐ Group ID ☒ Employee ID

Documents Using Employee ID

Employees to Process [Personalize](#) | [Find](#) | [View All](#) | First 1 of 1 Last

	*Empl ID	Empl Record	Name	Language Code
1	10004321	0	JANE SMITH	

[Save](#) [Notify](#) [Add](#) [Update/Display](#)

9. On the Process Scheduler page, click the **OK** button.

Process Scheduler Request

User ID Run Control ID NR_10004321

Server Name Run Date 12/04/2017

Recurrence Run Time 12:46:01PM [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](#)

10. Click the [Process Monitor](#) hyperlink.

Create Documents

Run Control ID: NR_10004321 Report Manager **Process Monitor** Run

Run Request Parameters

Period Begin Date: 07/01/2018 Period End Date: 06/30/2019

Document Type: ANNUAL REVIEW Template ID: ANNUAL PERFORMANCE R

Manager Selection Method: By Reports To Position

Create Documents Using

☐ Group ID ☒ Employee ID

Documents Using Employee ID

Employees to Process Personalize | Find | View All | First 1 of 1 Last

*Empl ID	Empl Record	Name	Language Code
1 10004321	0	JANE SMITH	

Save Notify Add Update/Display

11. Continue to click the [Refresh](#) button until Run Status shows *Success*.

Process List

View Process Request For

User ID Type Last 1 Days Refresh

Server Name Instance From Instance To

Run Status Distribution Status Save On Refresh

Process List Personalize | Find | View All | First 1 of 1 Last

Select	Instance	Seq	Process Type	Process Name	User	Run Date/Time	Run Status	Distribution Status	Details
<input type="checkbox"/>	3701737		Application Engine	EP_MGRDOC		12/04/2017 12:46:01PM EST	Success	Posted	Details

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.

View Document Creation Results

Enter any information you have and click Search. Leave fields blank for a list of all values.


Find an Existing Value

▼ Search Criteria

Run Control ID: begins with ▼ NR_10004321

☐ Case Sensitive

Limit the number of results to (up to 300): 300

Search Clear [Basic Search](#)  [Save Search Criteria](#)

13. The View Document Creation Results page will display the document creation status.

View Document Creation Results

Run Control ID: NR_10004321

Run Request Parameters



Period Begin Date:	07/01/2018	Period End Date:	06/30/2019
Document Type:	ANNUAL		ANNUAL REVIEW
Manager Selection Method:	By Reports To Position		

Create Documents Using

☒ Group ID ☒ Employee ID

Documents Using Employee ID

Employee Processed							Personalize End	First 1 of 1 Last
Empl ID	Empl Record	Name	Template ID	MgrID / MtrID	Supervisor Name	Success?	Status	
10004321	0	JANE SMITH	ANNUAL PERFORMANCE REVIEW	10207894	WILLIAM TAYLOR	Yes	Document created successfully	

 Save  Return to Search

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.

View Performance Documents

Use the Search capabilities to find a specific document or documents to view. Listed below will be all the documents for which you have access within that criteria

Search for Documents

Employee First Name:	<input type="text" value="Jane"/>	Last Name:	<input type="text" value="Smith"/>
Manager First Name:	<input type="text"/>	Last Name:	<input type="text"/>
Document Type:	<input type="text" value="ANNUAL REVIEW"/>	Status:	<input type="text"/>
Period Between:	<input type="text" value="07/01/2018"/>	<input type="text" value="06/30/2019"/>	

16. Click the [Document Type](#) hyperlink (ANNUAL REVIEW) and the Document Details page will display.

View Performance Documents

Document Details

EMPLOYEE NAME **Human Capital Mgt Sr Analyst**
ANNUAL REVIEW: 07/01/2018 - 07/31/2018

Performance Document Details

Employee:	EMPLOYEE NAME	Job Title:	Human Capital Mgt Sr Analyst
Document Type:	ANNUAL REVIEW	Period:	07/01/2018 - 07/31/2018
Template:	ANNUAL PERFORMANCE REVIEW	Document ID:	256839
Manager:	SUPERVISOR NAME	Status:	In Progress

Document Progress



Step	Status	Due Date
Establish Evaluation Criteria	Not Started	09/29/2017
Nominate Participants	Not Started	07/01/2018
Track Nominations	Not Started	07/01/2018
Review Participant Evaluations	Not Started	07/01/2018
Review Self Evaluation	Not Started	07/01/2018
Review Manager Evaluation	Not Started	07/16/2018

[Return to Select Documents](#)



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.

Employee Groups Processed								Personalize Find   First 1-1296 of 1296 Last
Empl ID	Empl Record	Name	Template ID	MgrID / MtrID	Supervisor Name	Success?	Status▼	
	0		ANNUAL PERFORMANCE REVIEW			No	Invalid or missing input parameter	
	0		ANNUAL PERFORMANCE REVIEW			No	Invalid or missing input parameter	
	0		ANNUAL PERFORMANCE REVIEW			No	Invalid or missing input parameter	

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.

Employee Groups Processed								Personalize Find   First
Empl ID	Empl Record	Name	Template ID	MgrID / MtrID	Supervisor Name	Success?	Status	
	0		ANNUAL PERFORMANCE REVIEW			No	Document already exists.	