EUT Course - 185

Performance Management for Managers and Agency Administrators

PeopleSoft 9.2

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PM for Managers and Agency Administrators

S2 - Manager Process Steps

Creating a Statewide Long Document

Section 2, Lesson 1 Exercise 1 - Scenario 1: Creating a Statewide Long Performance Document

Procedure

In this lesson you will learn how to Create a Document for Test Employees DEFG and KKB.

Step 1.	Note: The CAPPS HR/Payroll Dashboard (home page) that you see here is for training purposes only and may display more functionality (menus) than you will see in your environment. The view of your home page will vary according to your role.
Step 2.	Click the Manager Self Service link.
Step 3.	All of the Performance Management tasks will be conducted within the Performance Management Module. Click the Performance Management link.
Step 4.	Within the Performance Management Module, there is a folder for Performance Documents and links for other tasks to be performed.
Step 5.	Click the Performance Documents link.
Step 6.	Within the Performance Documents folder, there are links for documents that need to be Created, have been created (Current), and are Complete (Historical).
Step 7.	View-Only Documents are accessible by the Sr. Level Managers and above to view direct and indirect performance documents.
Step 8.	There is an Administrative Task folder to perform certain actions for Current Documents. You will review these later in the training.
Step 9.	Click the Create Documents link.

This page lists all of your direct reports with the option to select the employees that will be assigned to this document.

Step 10. If you want to create the same document for all of your direct reports you will Select All, otherwise select them individually.

Step 11. The As of Date can be changed in order to show the direct reports that were assigned to you prior to the current date.

Step 12. Click the Test Employee DEFG option.

Step 13. Click the Test Employee KKB option.

Step 14. Click the Continue button.

Step 15. Based on your agency's policies, the dates could be fiscal, calendar, or anniversary dates.

For this example, you will use the Calendar Year.

Enter the desired information into the Period Begin Date field. Enter "01012018".

Step 16. Enter the desired information into the Period End Date field. Enter "12312018".

Step 17. Click the Document Type list.

Step 18. Click the Statewide Long Document Type list item.

Step 19. You have the option of cloning a previous document in order to copy the Goals/Competencies that were defined.

You will review cloning later in training.

Step 20. Click the Template list.

The appropriate template for the document type should be selected.

Step 21. Click the Statewide Long Eval Form list item.

Step 22. Click the Create Documents button.

Step 23. This is an error that you will see when you are attempting to Create a Performance Document that has already been created.

This is only being shown as a reference, your document created successfully.

Step 24. When the Performance documents are successfully created they become Current Performance Documents.

Step 25. In order to begin Defining Criteria for the document, you will select the Current Document for your employee.

After you Create a Document in some instances you may not want to begin working on the Current Document right away.

When this is the case, you will navigate back to Current documents.

The next topic will show you how.

Step 26. Click the Home link.

Congratulations! You have completed this lesson.

Defining Criteria for Long Document

Section 2, Lesson 2 Exercise 2 - Scenario 1: Defining Criteria for a Statewide Long Document Type

Procedure

In this lesson you will learn how to Define Criteria for the Current Document using Test Employee DEFG.

Step 1. Click the **Manager Self Service** link.

Step 2. Click the **Performance Management** link.

Step 3. Click the **Current Documents** link.

Step 4. This page lists all of the Current Performance Documents and their status.

You will be defining criteria for the Performance Document that was just created for - Test Employee DEFG.

Click the **Test Employee DEFG** link.

Step 5. Let's review this page by sections.

To the left is the **Activity Guide** which tells you where you are within the Performance Management Process.

Depending upon your business processes, you may or may not complete every single step/task.

Step 6. You will notice that there is a yellow icon next to Define Criteria.

Yellow means this step is waiting to be completed.

As you go through the processes you will see the yellow icon turn to green which means that a step and or task is complete.

Step 7. There are due dates within each of the steps.

Step 8. Managers have 30 days to complete **Defining Criteria**.

Step 9. **Checkpoint 1** due dates are 305 days before Period End Date.

Step 10. **Checkpoint 2** is 180 days before Period End Date.

Step 11. **Finalize Criteria** is 60 days before the Period End date.

Step 12. **Nominate Participants** is 10 days after the Period End date.

Step 13. **Review Participant Evaluations** and **Review Employee Evaluations** is 15 days after Period End date.

Step 14. **Complete Manager Evaluation** is 60 days after Period End Date.

Step 15. Click the **Overview** link.

The Overview page provides details on the Performance Process Steps.

Keep in mind that it all depends on your agency's business processes if certain steps will be performed or not.

Step 16. Click the **More Details** link.

Scroll down in order to review the remaining steps.

Step 17. Click the scrollbar.

Step 18. You may close this screen by using the Return Link at the bottom or the close icon.

Click the **Close** link.

Step 19. You can minimize the **Activity Guide** in order to see more of the document on the right.

Click the **Minimize Performance Process** button.

Step 20. You are in the **Define Criteria** step where you are going to Update and Approve the Defined Criteria.

Step 21. The top portion of the page provides more details including those entered when creating the document.

Step 22. Every Current document will have a **Document ID** assigned to it. When cloning, this is the ID that will need to be used when you want to clone.

You will learn more about cloning later.

Step 23. In some cases, you may need to change the dates that were entered when you created the document.

The **Change Dates** option may need to be used in the case that the employee is leaving or transferring to another agency.

This must be done before the completion of the document.

Click the **Change Dates** button.

Step 24. **NOTE:** The Change Dates are limited to 12 months prior to Period Begin Date and 12 months after Period End Date.

Click the **Cancel** button.

Step 25. The **Save** button can be used as frequently as needed.

Step 26. When you are all done, you will **Save** and **Approve** the defined criteria.

Step 27. The print icon allows you to view and print the document in a pdf format.

Step 28. The notify link brings up an email screen for you to send a message.

Please note that there are automated emails that are already set up for certain tasks, however, you can still use this option.

Step 29. The email addresses are defaulted to the employee for the document. The email addresses can be changed, if needed.

Step 30. The **Subject** is pre-populated referring to the Document Type and the period dates.

Step 31. You can add **Message Text** for the body of the notification.

Step 32. The bottom half of the page contains **Evaluation Tabs**.

Step 33. The active tab is **Type of Evaluation**.

It is currently collapsed so you will expand it in order to view all of the details at once.

Step 34. Click the **Expand** link.

Step 35. There are several options for defining the purpose of this document.

Step 36. You can delete the **Evaluation Types** that are not applicable and you can also edit the names.

Step 37. You are using this Current Document for an **Annual Employee Evaluation** so the others can be removed.

Step 38. Click the **Delete** button.

Step 39. Click the **Yes - Delete** button.

Step 40. You will also remove the **Probationary Employee Evaluation** leaving you with the Annual Employee Evaluation.

Step 41. Click the **Delete** button.

Step 42. Click the **Yes - Delete** button.

Step 43. There is an option to **attach documents** regarding this employee. You may want to attach documents that will enhance the evaluation.

The employee will not be able to see the attachments unless you allow it.

Attachments will be covered later in training.

Step 44. Click the **Save** button.

Step 45. Click the **Goals/Objectives** tab.

Step 46. Click the **Add Goal** link.

Step 47. There are **Goals** already set up (pre-defined) in which you can make selections.

Step 48. The defaulted selection is to Add pre-defined goals.

You have the option of adding your own as well.

Step 49. Click the **Next** button.

Step 50. You are going to search for the pre-defined list of goals.

Click the **Search** button.

Step 51. You may need to review the details about a pre-defined goal to ensure that you would like to use it.

Step 52. Click the **Item Details** button.

Step 53. Click the **Return** button.

Step 54. Click the **Increase customer satisfaction by 10%** option.

Step 55. Click the **Cut operational expenses by 5%** option.

Step 56. Click the **Reduce Customer Complaints by 5%** option.

Step 57. Click the **Obtain additional education** option.

Step 58. Click the **Add** button.

Step 59. Now you will add your own **Goal**.

Step 60. Click the **Add Goal** link.

Step 61. Click the **Add your own goal** option.

Step 62. Click the **Next** button.

Step 63. Enter the desired information into the **Title** field. Enter "**Complete CAPPS HR/Payroll Training Courses**".

Step 64. Enter the desired information into the **Description** field. Enter "**Complete the required CAPPS HR/Payroll Training Courses for the position held.**".

Step 65. Click the **Spell Check Long Description (Alt+5)** button.

Step 66. Click the **Ignore** button.

Step 67. Click the **OK** button.

Step 68. Click the **Add** button.

Step 69. Click the scrollbar.

Step 70. You will edit the description for Goal 4: Obtain additional education.

Click the **Edit Details** button.

Step 71. You want the existing Description to read:

Obtain additional education to increase workforce **and leadership** skills.

Step 72. Enter the desired information into the **Obtain additional education to increase workforce skills** field. Enter "**and leadership**".

Step 73. Click the **Update** button.

Step 74. Click the **Save** button.

Step 75. Click the **Core Competency** tab.

Step 76. Click the **Add Competency** link.

Step 77. There are pre-defined competencies as well.

Step 78. Click the **Next** button.

Step 79. Click the **Search** button.

Step 80. Click the **Item Details** button.

Step 81. Click the **Return** button.

Step 82. You want to review the Item Details for Customer Service.

Click the **Item Details** button.

Step 83. Click the **scrollbar**.

Step 84. Click the **Return** button.

Step 85. You will make the appropriate selections from the list of pre-defined Competencies.

Step 86. Click the **Adaptability** option.

Step 87. Click the **Communication** option.

Step 88. Click the **Customer Service** option.

Step 89. Click the **Leadership - Employee** option.

Step 90. Click the **Add** button.

Step 91. Click the **Save** button.

Step 92. Click the **Career Development** link.

Step 93. It is important to enter the **Career Development** details at the beginning of the review period.

Step 94. Career updates can be made using Check Points throughout the year.

Step 95. Click the **Add Item** link.

Step 96. You will add your own item(s) for Development.

Click the **Next** button.

Step 97. Enter the desired information into the **Title** field. Enter "**List the areas planned for development**".

Step 98. Enter the desired information into the **Title** field. Enter "**Enter the description for your development item.**".

Step 99. Click the **Add** button.

Step 100. You can add a specific **Behavior** for the areas planned for development.

Click the **Add Behavior** link.

Step 101. Enter the desired information into the **Title** field. Enter "**PMP Certification**".

Step 102. Click the **Update** button.

Step 103. **Goals/Objectives** and **Career Development** can be edited throughout the entire Performance Management process.

Step 104. **Competencies** can be edited any time before the **Finalizing Criteria** step is complete.

Step 105. Click the **Save** button.

Step 106. You have completed **Defining Criteria** and now you will go ahead and **Approve.**

Step 107. Click the **Approve** button.

Step 108. Click the **Confirm** button.

Step 109. Click the **Expand** button.

Step 110. Notice the green icon with a check mark.

Step 111. This represents that this step is complete.

Step 112. Click the **Home** link.

Congratulations! You have completed this lesson.

Creating and Updating Short Document

Section 2, Lesson 2 Exercise 2 - Scenario 2: Creating and Updating Short Document

Procedure

In this lesson you will learn how to create and update a Statewide Short Document Type.

1) Create a Performance Document for Test Employee S.

2) Update evaluation information for Test Employee S.

3) You will also attach a document and allow for it to be viewed by the employee.

Step 1. Click the **Manager Self Service** link.

Step 2. Click the **Performance Management** link.

Step 3. Click the **Create Documents** link.

Step 4. Click the **Select** option.

Step 5. Click the **Continue** button.

Step 6. Enter the desired information into the **Period Begin Date** field. Enter "**01012018**".

Step 7. Enter the desired information into the **Period End Date** field. Enter "**12312018**".

Step 8. Click the **Document Type** list.

Step 9. Click the **Statewide Short Document Type** list item.

Step 10. Click the **Template** list.

Step 11. Click the **Statewide Short Eval Form** list item.

Step 12. Click the **Create Documents** button.

Step 13. Click the **Current Documents** link.

Step 14. Click the **Test Employee S** link.

Step 15. As you can see, the **Activity Guide** looks quite different in the Short versus the Long Document.

The Short form doesn't have: Define Criteria, Checkpoints, Nominate Participant or Approval steps.

Step 16. Once the **Short** document is created, the employee is notified that their **Employee Self-Evaluation** is active.

Step 17. When the employee starts their self-evaluation document the status light will turn "yellow" in the manager's activity guide.

Step 18. The manager will communicate the employee's job responsibilities (criteria) off-line and use the **Short** template to document the employee's progress at the end of the evaluation period.

Step 19. You are rating the employee's Goals and Competencies as you go along.

Step 20. Click the **Minimize Performance Process** button.

Step 21. You will fill in information on the **Type of Evaluation** tab.

Click the **Expand** link.

Step 22. You will determine which evaluation will be used and remove the others.

Step 23. If you can recall, the **Yes** and **No** options did not appear on this page in the last exercise. They will populate later in that document.

Step 24. Click the scrollbar.

Step 25. You will delete the **Probationary Employee Evaluation**.

Click the **Delete** button.

Step 26. Click the **Yes - Delete** button.

Step 27. You will delete the **Close-Out Employee Evaluation**.

Click the **Delete** button.

Step 28. Click the **Yes - Delete** button.

Step 29. You need to answer whether this is an Annual Employee Evaluation or not.

Click the **Yes** option.

Step 30. Click the scrollbar.

Step 31. You will enter comments for the Document Purpose Summary, if applicable.

Enter the desired information into the field. Enter "**The purpose of this document is to evaluate performance.**".

Step 32. Click the **Save** button.

Step 33. Click the **Goals/ Objectives** tab.

You are not required to add **Goals/Objectives** on the **Short** form.

Step 34. You can use the **Goals Summa**ry section to rate and enter manager comments.

Step 35. Click the **Manager Rating** list.

Step 36. Click the **3- Meets Expectations** list item.

Step 37. Enter the desired information into the **Manager Comments** field. Enter "**The employee is meeting all expectations and making progress to improve.**".

Step 38. Click the **Core Competency** tab.

Step 39. You are not required to add **Competencies** on the **Short** form.

You can use the **Competencies Summa**ry section to rate and enter manager comments.

Step 40. Click the **Manager Rating** list.

Step 41. Click the **4- Exceeds Expectations** list item.

Step 42. Enter the desired information into the **Manager Comments** field. Enter "**I am very impressed with the competencies of this employee.**".

Step 43. Click the **Manager Comments** tab.

Step 44. You can enter overall comments regarding this employee.

Step 45. Enter the desired information into the **Manager Comments** field. Enter "**Overall a great employee that is an asset to our department.**".

Step 46. Click the scrollbar.

Step 47. With any form that you use there is an option to attach documents. You may want to include a certificate, letter of accomplishment and/or accolades.

You can add as many attachments as you want but the limit is 5MB per attachment.

Step 48. Click the **Add Attachment** link.

Step 49. Click in the **Upload** field.

Step 50. Click the scrollbar.

Step 51. Click the **Performance Mgmt Document.docx** list item.

Step 52. Click the **Open** button.

Step 53. Click the **Upload** button.

Step 54. You can type in a description for the file so you will have an idea of what it contains.

Enter the desired information into the **Description** field. Enter "**Accolades**".

Step 55. Click the **Attachment Audience** list.

Step 56. You can decide whether you would like the employee to access this file or only the manager.

Click the **Employee And Manager** list item.

Step 57. Click the **Save** button.

Step 58. You will select the Share with Employee button when you have reviewed the employee's self-evaluation document and you are ready to share your final ratings and comments with the employee.

Click the **Share with Employee** button.

Step 59. Click the **Confirm** button.

Step 60. The employee will receive an email notification.

Step 61. Click the **Expand** button.

Step 62. The **Update and Share** step is now complete.

Step 63. The remaining steps for the Short Document will not be shown in training.

Please refer to topics:

- Reviewing Employee Self Evaluation and
- Overriding Acknowledgment/Completing

Step 64. Click the **Home** link.

Step 65. Congratulations! You have completed this lesson.

Cloning Long Document

Section 2, Lesson 2 Exercise 2 - Scenario 3: Cloning Statewide Long Document

Procedure

In this lesson you will learn how to clone an existing document.

1) Employee Name: Test Employee FFF
2) Period Dates - 1/1/2019 - 12/31/2019
3) Statewide Long Type Form
4) Clone an existing document - Doc ID#189016 - Employee Test DEFG
4) Review cloned information

Step 1. Click the **Manager Self Service** link.

Step 2. Click the **Performance Management** link.

Step 3. Click the **Create Documents** link.

Step 4. Click the **Test New Test FFF Employee** option.

Step 5. Click the **Continue** button.

Step 6. Enter the desired information into the **Period Begin Date** field. Enter "**01012019**".

Step 7. Enter the desired information into the **Period End Date** field. Enter "**12312019**".

Step 8. Click the **Document Type** list.

Step 9. Click the **Statewide Long Document Type** list item.

Step 10. Click the **Clone from Prior Document** list.

Step 11. Click the **Yes** list item.

Step 12. You will use the Doc ID from the current document that was created in the last lesson.

Click the **Look up (Alt+5)** button.

Step 13. If you didn't jot down the **Document ID#**, the Evaluatee Name and Period Dates should help you identify which Document ID to select.

Step 14. Click the **189016** link.

Step 15. Click the **Create Documents** button.

Step 16. This document was cloned successfully. Now you can go to the Current Document and check to ensure all was cloned.

Click the **Current Documents** link.

Step 17. You need to select the Employee for the correct current document.

Step 18. Click the **Test New Test FFF** link.

Step 19. Click the **Minimize Performance Process** button.

Step 20. The **Type of Evaluatio**n tab with the Document Purpose - Annual Employee Evaluation.

Step 21. Click the **Goals/Objectives** tab.

All of the **Goals** were cloned.

Step 22. Click the **Core Competency** tab.

All of the **Competencies** were cloned.

Step 23. Click the **Career Development** link.

Step 24. Click the **Expand section List the areas planned for development** link.

You may want to change the **Employee Development Area** so it will be important to expand it to see what is listed here.

Step 25. Click the **Save** button.

Step 26. Click the **Home** link.

Step 27. Congratulations! You have completed this lesson.

Completing Checkpoint 1

Section 2, Lesson 2 Exercise 3 - Scenario 1: Completing Checkpoint 1

Procedure

In this lesson you will complete Checkpoint 1 for Test Employee DEFG and share with the employee.

Step 1. Click the **Manager Self Service** link.

Step 2. Click the **Performance Management** link.

Step 3. Click the **Current Documents** link.

Step 4. Test Employee DEFG has a **Track Progress - Checkpoint 1 status**.

Click the **Test Employee DEFG** link.

Step 5. Click the **Minimize Performance Process** button.

Step 6. **During Checkpoint 1** - you will update the Goals/Objectives, Competencies, and Employee Development according to progress made by the employee and/or information that needs to be edited, added and/or deleted.

Step 7. Click the **Goals/Objectives** tab.

Step 8. Click the **Expand** link.

Step 9. Click the **Edit Details** button.

Step 10. Click the **Status** list.

Step 11. Click the **In Progress** list item.

Step 12. You can use the **Percent Complete** and **Due Date** fields, when applicable.

Step 13. Click the **Update** button.

Step 14. Click the scrollbar.

Step 15. You have decided that **Goal 2** isn't applicable for this employee's evaluation so you can delete it.

Click the **Delete Goal** button.

Step 16. Click the **Yes - Delete** button.

Step 17. Click the scrollbar.

Step 18. Click the **Edit Details** button.

Step 19. Click the **Status** list.

Step 20. Click the **In Progress** list item.

Step 21. Click the **Update** button.

Step 22. Click the scrollbar.

Step 23. Click the **Edit Details** button.

Step 24. Click the **Status** list.

Step 25. Click the **In Progress** list item.

Step 26. Click the **Update** button.

Step 27. Click the scrollbar.

Step 28. You have completed entering updates to the Goals.

Now you can enter your comments for the Goals & Objectives Summary text box.

Step 29. Enter the desired information into the field. Enter "**Employee DEFG is making progress toward assigned Goals/Objectives. One objective was removed due to it being out of scope for this position.**".

Step 30. Click the scrollbar.

Step 31. Click the **Core Competency** link.

Step 32. **Competencies** can be edited, added and/or deleted during the **Checkpoint** and **Finalizing Criteria** steps.

In this example, you won't make any changes to the existing Competencies.

Step 33. Click the **Career Development** link.

Step 34. Click the **Expand** link.

Step 35. Click the **Edit Details** button.

Step 36. Enter the desired information into the field. Enter "**Employee DEFG is searching for PMP certification courses that are available within a certain time frame that will not interfere with work load.**".

Step 37. Click the scrollbar.

Step 38. You may also make updates to the Development area.

In training, we will not make any entries.

Step 39. Click the **Save** button.

Step 40. You also have an option to **Skip this Checkpoint**.

Step 41. However in this example, you want to keep your Checkpoint updates and Share with the Employee.

Click the **Share with Employee** button.

Step 42. Click the **Confirm** button.

Step 43. As noted, your comments are Shared.

Step 44. Click the **Expand** button.

Step 45. There is an auto-generated email that is sent to the employee informing them that you have shared this document.

Sharing is optional not a requirement.

Step 46. Click the **Home** link.

Step 47. Once you have discussed and reviewed the Checkpoint feedback with your employee, you will need to select **Complete Checkpoint** so that the system can move you to the next step.

Step 48. Click the **Complete Checkpoint** button.

Step 49. Click the **Confirm** button.

Step 50. Click the **Expand** button.

Step 51. When it is time you will move on to **Checkpoint 2**, if applicable.

Step 52. Click the **Home** link.

Step 53. Congratulations! You have completed this lesson.

Skipping Checkpoint 2

Section 2, Lesson 2 Exercise 3 - Scenario 2: Skipping Checkpoint 2

Procedure

In this lesson you will learn how to Skip Checkpoint 2 for Test Employee DEFG.

Step 1. Click the **Manager Self Service** link.

Step 2. Click the **Performance Documents** link.

Step 3. Click the **Current Documents** link.

Step 4. Click the **Scroll bar**.

Step 5. Click the **Test Employee DEFG** link.

Step 6. Click the **Minimize Performance Process** button.

Step 7. Click the **Skip Checkpoint** button.

Step 8. Click the **Confirm** button.

Step 9. Click the **Expand** button.

Step 10. Checkpoint 2 shows an update as Skipped.

Step 11. Click the **Home** link.

Step 12. Congratulations! You have completed this lesson.

Finalizing Evaluation Criteria

Section 2, Lesson 2 Exercise 4 - Scenario 1: Finalizing Evaluation Criteria

Procedure

In this lesson you will learn how to finalize the evaluation criteria for Employee DEFG - #00000000246.

Step 1. Click the **Manager Self Service** link.

Step 2. Click the **Performance Documents** link.

Step 3. Click the **Current Documents** link.

Step 4. Click the **Scroll bar**.

Step 5. Click the **Test Employee DEFG** link.

Step 6. Click the **Minimize Performance Process** button.

Step 7. **Finalizing Criteria** is a required step within the Performance Management Process when using the **Statewide Long Document**.

The employee evaluation will be based upon the criteria that you have finalized.

Step 8. You will go through the **Evaluation Tabs** and determine if you need to make any final changes such as adding, deleting and/or editing previous selections.

Step 9. Click the **Goals/Objectives** tab.

There are no changes that need to be made to the **Goals/Objectives**.

Step 10. Click the **Core Competency** tab.

Step 11. Click the **Expand** link.

Step 12. You have determined that you need to remove **Competency 3 - Customer Service** for this employee.

Step 13. Click the scrollbar.

Step 14. Click the **Delete Competency** button.

Step 15. Click the **Yes - Delete** button.

Step 16. Click the **Career Development** tab.

Step 17. Click the **Expand section List the areas planned for development** link.

There are no changes for the Employee Development Area.

Step 18. Click the **Save** button.

Step 19. You have the ***option*** to Share your updates with the employee and continue to make changes before completing this step.

Step 20. Once you select **Complete,** it will make the self-evaluation available to the employee and additional changes are limited.

Step 21. In this case, you will **Share with the Employee.**

Step 22. Click the **Share with Employee** button.

Step 23. Click the **Confirm** button.

Step 24. Once you have discussed the changes with the employee (if applicable), you are able to come back and make additional changes then **complete** the finalize criteria step.

Step 25. You have discussed the criteria updates with the employee and are ready to **Complete the Finalize Criteria** step.

Step 26. Click the **Home** link.

Step 27. Click the **Manager Self Service** link.

Step 28. Click the **Performance Management** link.

Step 29. Click the **Current Documents** link.

Step 30. Click the **Scrollbar**.

Step 31. Click the **Test Employee DEFG** link.

Step 32. Click the **Minimize Performance Process** button.

Step 33. Click the **Complete** button.

Step 34. Click the **Confirm** button.

Step 35. Now that the Finalize Criteria step is **Complete,** the employee will receive an email instructing them to **Complete the Employee Self Evaluation**.

Step 36. Click the **Home** link.

Step 37. Congratulations! You have completed this lesson.

Nominating/Tracking Participants

Section 2, Lesson 2 Exercise 5 - Scenario 1: Nominating/Tracking Participants

Procedure

In this lesson you will learn how to Nominate a Participant and Track the Nomination.

You will select the following as Nominees to Participate:

1) Test Employee GG
2) Test Employee HHH

Step 1. Click the **Manager Self Service** link.

Step 2. Click the **Performance Documents** link.

Step 3. Click the **Current Documents** link.

Step 4. Click the **Scroll bar**.

Step 5. Click the **Test Employee DEFG** link.

Step 6. Click the **Nominate Participants** object.

Step 7. Click the **Add Nominees** link.

Step 8. Click the **Minimize Performance Process** button.

Step 9. As indicated, you can elect to nominate up to a maximum of 5 participants.

Step 10. Click the **Add Peer** link.

Step 11. You will search for the nominee's name.

Enter the desired information into the **Name** field. Enter "**Test**".

Step 12. Click the **Search** button.

All results that include the name Test will be shown.

Step 13. Click the **Scroll bar**.

Step 14. Click the **Test Employee GG** option.

Step 15. Click the **Test Employee HHHH** option.

Step 16. Click the **Scroll bar**.

Step 17. Click the **OK** button.

Step 18. If you change your mind on these nominees, there is a delete option.

Step 19. Click the **Save** button.

Step 20. Click the **Submit Nominations** button.

Step 21. Click the **Confirm** button.

Step 22. There is a system generated email that will be sent to the nominees informing them of your request.

Step 23. Click the **Expand** button.

Step 24. Click the **Nominate Participants** object.

Step 25. You can **Track Nominations** for those participants that you elected.

Step 26. Click the **Track Nominations** link.

Step 27. Click the **Minimize Performance Process** button.

Step 28. You have decided to remove one of the participants because you don't think they are knowledgeable enough about the employee in order to complete the evaluation.

Click the **Cancel** link.

Step 29. Click the **Confirm** button.

Step 30. If you change your mind again, you can Resubmit your request.

Step 31. Click the **Expand** button.

Step 32. Once the Nominee accepts or denies the nomination the manager will receive an email.

Step 33. In addition, you will be notified when a participant has completed the Participant Evaluation for the employee.

Step 34. Click the **Home** link.

Step 35. Congratulations! You have completed this lesson.

Reviewing Participant Evaluations

Section 2, Lesson 2 Exercise 5 - Scenario 2: Reviewing Participant Evaluations

Procedure

In this lesson you will learn how to review the participant evaluation.

Step 1. Click the **Manager Self Service** link.

Step 2. Click the **Performance Documents** link.

Step 3. Click the **Current Documents** link.

Step 4. Click the **Scroll bar**.

Step 5. Click the **Test Employee DEFG** link.

Step 6. Click the **Expand Sub Steps** button.

Step 7. Click the **View** link.

Step 8. Click the **Test Employee GG** link.

Step 9. Keep in mind that the Participant evaluation only includes the Competencies ***not*** the goals/objectives or career development sections.

Step 10. Click the **Expand** link.

Step 11. Review all of the Competency ratings entered.

Step 12. Click the **Scroll bar**.

Step 13. Notice that the participant also included **Competencies Summary Comments**.

Step 14. Click the **Scroll bar**.

Step 15. The participant evaluation was opened up in another tab.

Step 16. Click the **Close Tab (Ctrl+W)** button.

Step 17. Click the **Return** button.

Step 18. Click the **Home** link.

Step 19. Congratulations! You have successfully completed this lesson.

Reviewing Employee Self-Evaluation

Section 2, Lesson 2 Exercise 6 - Scenario 1: Reviewing Employee Self-Evaluation

Procedure

In this lesson, you will review the employee self-evaluation for Employee DEFG - #00000000246

Step 1. Click the **Manager Self Service** link.

Step 2. Click the **Performance Management** link.

Step 3. Click the **Current Documents** link.

Step 4. Click the **Scroll bar**.

Step 5. Click the **Test Employee DEFG** link.

Step 6. Click the **Review Self Evaluation** link.

Step 7. Click the **scrollbar**.

Step 8. Click the **Core Competency** tab.

Step 9. Click the **Expand** link.

Step 10. Click the **scrollbar**.

Step 11. Click the **Career Development** tab.

Step 12. Click the **Expand** link.

Step 13. Click the **scrollbar**.

Step 14. Click the **Job Description** tab.

Step 15. Click the **Expand** link.

Step 16. Click the **scrollbar**.

Step 17. Click the **Home** link.

Step 18. Congratulations! You have completed this lesson.

Completing the Employee Final Evaluation

Section 2, Lesson 2 Exercise 7 - Scenario 1: Completing & Approving the Employee's Performance Evaluation

Procedure

In this lesson you will learn how to Complete the Final Employee Evaluation for Employee DEFG - #00000000246.

Step 1. Click the **Manager Self Service** link.

Step 2. Click the **Performance Documents** link.

Step 3. Click the **Current Documents** link.

Step 4. Click the **scrollbar**.

Step 5. Click the **Test Employee DEFG** link.

Step 6. Click the **Minimize Performance Process** button.

Step 7. Click the **Expand section Annual Employee Evaluation** link.

Step 8. Click the **Yes** option.

Step 9. Click the **Goals/Objectives** tab.

Step 10. Click the **Expand** link.

Step 11. Click the scrollbar.

Step 12. Click the **Manager Rating** list.

Step 13. Click the **4- Exceeds Expectations** list item.

Step 14. You can enter Manager Comments for each Goal.

In training, we will be entering comments in the Goals Summary field not for each individual goal.

Step 15. Click the scrollbar.

Step 16. Click the **Manager Rating** list.

Step 17. Click the **3- Meets Expectations** list item.

Step 18. Click the scrollbar.

Step 19. Click the **Manager Rating** list.

Step 20. Click the **4- Exceeds Expectations** list item.

Step 21. Click the scrollbar.

Step 22. This button is used to calculate the Average rating for each goal.

Step 23. Click the **Calculate Rating** button.

The average rating weighs out to be 4-Exceeds Expectations based on the average calculation of 3.67.

Step 24. Enter the desired information into the field. Enter "**Employee DEFG has proven to be a true asset to our department.**".

Step 25. Click the scrollbar.

Step 26. Click the **Core Competency** tab.

Step 27. Click the **Expand** link.

Step 28. Click the scrollbar.

Step 29. Click the **Manager Rating** list.

Step 30. Click the **4- Exceeds Expectations** list item.

Step 31. Click the scrollbar.

Step 32. Click the **Manager Rating** list.

Step 33. Click the **4- Exceeds Expectations** list item.

Step 34. Click the scrollbar.

Step 35. Click the **Manager Rating** list.

Step 36. Click the **4- Exceeds Expectations** list item.

Step 37. Click the scrollbar.

Step 38. Click the **Calculate Rating** button.

The average rating for the Competencies is 4.00.

Step 39. Click the **Overall Summary** tab.

Step 40. Click the **Calculate Rating** button.

The Overall Summary average calculation is a combination of all of the goal and competency ratings.

Step 41. Enter the desired information into the field. Enter "**Employee DEFG is a true leader and goes beyond the call of duty.**".

Step 42. Click the scrollbar.

Step 43. Click the **Career Development** tab.

Step 44. Click the **Expand** link.

Step 45. Click the **Edit Details** button.

Step 46. Enter the desired information into the field. Enter "**PMP Certification classes started.**"

Step 47. Click the **Status** list.

Step 48. Click the **In Progress** list item.

Step 49. Click the **Update** button.

Step 50. Click the scrollbar.

Step 51. Enter the desired information into the field. Enter "**The PMP certification will help Employee DEFG advance to the next level within our department. The coursework has begun so this is a work in progress.**".

Step 52. Click the **Save** button.

Step 53. Click the **Job Description** tab.

Step 54. Click the **Expand** link.

Step 55. Click the **Yes** option.

Step 56. Click the scrollbar.

Step 57. Click the **No** option.

Step 58. Click the scrollbar.

Step 59. Enter the desired information into the field. Enter "**I have confirmed that the job description has not changed and is current for the position.**".

Step 60. Click the **scrollbar**.

Step 61. Click the **Employee Comments** tab.

The employee can enter comments upon their review of the final evaluation.

Step 62. Click the **Save** button.

Step 63. Now you will **Submit for Approval** to the 2nd Level Manager.

Click the **Submit for Approval** button.

Step 64. Click the **Confirm** button.

Step 65. Click the **Expand** button.

Step 66. The performance evaluation is **Pending Approval** with the 2nd Level Manager.

Step 67. Click the **Home** link.

Step 68. Congratulations! You have completed this lesson.

2nd Level Manager Approving/Denying

Section 2, Lesson 2 Exercise 8 - Scenario 1: 2nd Level Manager Approval/Denial

Procedure

In this lesson you will learn how to approve an employee's performance management evaluation as the Sr. Level Manager.

Employee: Test Employee DEFG

Step 1. Once the Manager submits the document for Approval, the Sr. Level Manager will receive an email indicating there is a document to Approve.

Click the **Manager Self Service** link.

Step 2. Click the **Approve Documents** link.

Step 3. This page displays all of the documents awaiting an Approval for the Sr. Level Manager.

Click the **Test Employee DEFG** link.

Step 4. Before you approve, you need to review the Performance Document details and review all tabs.

Click the **Performance Document Details** link.

Step 5. Click the **Expand** link.

Step 6. The manager has indicated that this is an **Annual Employee Evaluation**.

Step 7. Click the **Goals/Objectives** tab.

Step 8. Click the **Expand** link.

Step 9. You can review the individual goals and/or only review the average of the ratings as well as the manager comments, when applicable.

Step 10. Click the **scrollbar**.

Step 11. Within the **Goals Summary** section, there is the average rating along with the Manager's Comments.

Step 12. Click the **scrollbar**.

Step 13. Click the **Core Competency** tab.

Step 14. For competencies, you have decided to just review the Competencies Summary section.

Click the **Overall Summary** tab.

Step 15. You will review the **Overall Summary** and the manager comments.

Step 16. Click the **Career Development** tab.

Step 17. Click the **Expand** link.

Step 18. Click the **Job Description** tab.

Step 19. The manager has indicated that all is well with the Job Description.

Step 20. Click the **Close** link.

Step 21. Now that the document has been reviewed you can enter a comment.

A comment is not required but should be entered if the evaluation will be denied.

Step 22. Click in the **Comment** field.

Step 23. Enter the desired information into the **Comment** field. Enter "**Great employee!**"

Step 24. You will **Approve** or **Deny** the evaluation. Please ensure that your comments explain when you deny an evaluation.

Click the **Approve** button.

Step 25. Click the **Close** button.

Step 26. The status is now **Approved**.

Step 27. The Sr. Level Manager can show or hide their comments from the manager.

Step 28. Click the **View/Hide Comments** link.

Step 29. Now the Comments can be viewed.

Step 30. Click the **Home** link.

Step 31. Congratulations! You have completed this lesson.

Viewing the Approval Status

Section 2, Lesson 2 Exercise 8 - Scenario 2: Viewing the Approval Status

Procedure

In this lesson you will learn how to view the approval status for the document for Employee DEFG - #00000000246

Step 1. Click the **Manager Self Service** link.

Step 2. Click the **View Approval Status** link.

You may use any of the fields to filter for an approval status.

Step 3. Click the **Approval Status** list.

You want to see if your document has been approved.

Step 4. Remember that you will also receive an email when it is approved by the Sr. Level Manager.

Step 5. Click the **Approved** list item.

Step 6. Click the **Search** button.

Step 7. All of **your** documents in an Approved Status are shown.

Step 8. Click the **scrollbar**.

Step 9. Click the **Test Employee DEFG** link.

You can see the date and time of the approval.

You can also see if the manager entered any comments for you regarding the evaluation.

Step 10. Click the **Expand** button.

Step 11. Click the **Home** link.

Step 12. Congratulations! You have completed this lesson.

Sharing Evaluation with the Employee

Section 2, Lesson 2 Exercise 9 - Scenario 1: Sharing the Performance Evaluation with the Employee

Procedure

In this lesson you will learn how to Share the Evaluation with Test Employee DEFG.

Step 1. Click the **Manager Self Service** link.

Step 2. Click the **Performance Documents** link.

Step 3. Click the **Current Documents** link.

The document will be in an Approved status.

Step 4. Click the **Test Employee DEFG** link.

Step 5. Click the **Minimize Performance Process** button.

Step 6. Click the **Share with Employee** button.

Step 7. Click the **Confirm** button.

Step 8. Click the **Expand** button.

Step 9. After you meet with the employee, you will request acknowledgement of the evaluation.

Step 10. Click the **Home** link.

Step 11. Congratulations! You have completed this lesson.

Overriding Acknowledgement/Completing

Section 2, Lesson 2 Exercise 10 - Scenario 1: Overriding Acknowledgement and Completing the Process

Procedure

In this lesson you will learn how to request acknowledgement of the final evaluation from the employee.

You will also Override the employee's acknowledgement.

Step 1. Click the **Manager Self Service** link.

Step 2. Click the **Performance Management** link.

Step 3. Click the **Current Documents** link.

Step 4. Click the **Test Employee DEFG** link.

Step 5. Click the **Minimize Performance Process** button.

Step 6. Click the **Request Acknowledgement** button.

Step 7. Click the **Confirm** button.

Step 8. Let's pretend that your employee did not acknowledge the evaluation because they are not available.

You are going to **Override the Acknowledgement.**

Step 9. Click the **Minimize Performance** button.

Step 10. Click the **scrollbar**.

Step 11. The Acknowledgement is pending from the employee.

Step 12. Click the **Minimize Performance Process** button.

Step 13. Click the **Override Acknowledgement** button.

These are the options for Overriding. Once you confirm your option, your electronic signature will be placed in the employee's section of the document indicating an override.

You can select either option. In training, you will use the Employee Not Available option.

Step 14. Click the **Employee Not Available** option.

Step 15. Click the **Confirm** button.

Step 16. The last step is to **Complete** the evaluation.

Step 17. Even if the employee acknowledges the evaluation, you would still need to **Complete** the evaluation.

Step 18. Click the **Maximize Performance Process** button.

Step 19. Click the **Minimize Performance Process** button.

Step 20. Click the **Complete** button.

Step 21. Click the **Confirm** button.

Step 22. Click the **Home** link.

Step 23. Congratulations! You have completed this lesson.

Viewing/Printing Performance Evaluations

Section 2, Lesson 2 Exercise 11 - Scenario 1: Viewing/Printing the Performance Evaluation

Procedure

In this lesson you will learn how to view, print, save the completed employee performance evaluation for Test Employee DEFG.

Step 1. Click the **Manager Self Service** link.

Step 2. Click the **Performance Documents** link.

Step 3. Click the **Historical Documents** link.

Step 4. Click the **Test Employee DEFG** link.

Step 5. Click the **Minimize Performance Process** button.

Step 6. Click the **Print** link.

Step 7. Click the **Hide Feedback** option.

Step 8. Click the **OK** button.

Step 9. Using this tool bar, you can either **Save, Print,** and/or **View.**

Step 10. Click the **Next Page** object.

Step 11. Click the **Next Page** object.

Step 12. Click the **Next Page** object.

Step 13. Click the **Next Page** object.

Step 14. Click the **Next Page** object.

Step 15. The eSignature section displays the employee signature once they acknowledge the evaluation.

Step 16. Displayed for training, is the example of when the manager acknowledges for the employee, the manager's name appears as the employee (with the notation) Manager Override.

Step 17. Click the **scrollbar**.

Step 18. Click the **Close** button.

Step 19. Click the **Close current tab** button.

Step 20. Click the **Home** link.

Step 21. Congratulations! You have completed this lesson.

S3 - Manager Administrative Tasks

Maintaining Performance Notes

Section 3, Lesson 1 Exercise - Scenario 1: Maintaining Performance Notes

Procedure

In this lesson you will learn how to maintain performance notes for an employee.

You will enter notes for:

1) Employee: 000000000008 - Test Employee H
2) You will transfer your note to - Manager Portal.

Step 1. Click the **Manager Self Service** link.

Step 2. Click the **Performance Management** link.

Step 3. Click the **Maintain Performance Notes** link.

Step 4. You can use the **Performance Notes** page to search for and enter performance notes.

Step 5. You can enter the **Empl ID** if it is known.

Enter the desired information into the **Empl ID** field. Enter "**000000000008**".

Step 6. If it is unknown, you can use the **Search** button.

Step 7. Click the **Look up Empl ID** button.

Step 8. Click the **00000000008** link.

Step 9. Click the **Add a New Note** button.

Step 10. Notice the date/time stamp for your entry.

If you were to add to these notes later, the Last Update and Updated By fields will populate.

Step 11. Click in the **Subject** field.

Step 12. Enter the desired information into the **Subject** field. Enter "**Checkpoint 1 Notes**".

Step 13. Press **[Tab]**.

Step 14. Enter the desired information into the **Note Text** field. Enter "**Test Employee H is very receptive to the changes in business processes. She has taken the liberty of taking the lead of documenting and training others on the changes. This was done without me making the request. I find this to be a sign of true leadership and team work.**"

Press Enter for the text to be added for you.

Step 15. Click the **Spell Check Note Text** button.

Step 16. Click the **OK** button.

Step 17. Click the **Save** button.

Step 18. Click the **Return to Performance Note Selection** link.

Step 19. After a period of time you may need to review the notes that you entered for this employee.

Step 20. Next you will walk through retrieving this note.

Step 21. Click the **Home** link.

Step 22. Click the **Manager Self Service** link.

Step 23. Click the **Performance Management** link.

Step 24. Click the **Maintain Performance Notes** link.

Step 25. Enter the desired information into the **Empl ID** field. Enter "**000000000008**".

Step 26. Click the **Look up Empl ID** button.

Step 27. Click the **00000000008** link.

Step 28. Click the **Search** button.

Step 29. The Subject that you created and the Created date and time stamp are displayed for your convenience.

Step 30. Click the **Checkpoint 1 Notes** link.

Step 31. Click the **Return to Performance Note Selection** link.

Step 32. You may also need to ***transfer*** the Performance Notes that you created for this employee to another manager.

Step 33. Let's walk through how to transfer notes.

You will select the note that you are transferring.

Step 34. Click the **Select** option.

Step 35. Click the **Transfer** button.

Step 36. You will search for the Manager that will receive the transferred note(s).

Step 37. Enter the desired information into the **Name** field. Enter "**manager**".

Step 38. Click the **Search** button.

You will select the appropriate person from the search results.

Step 39. Click the **Manager Portal** option.

Step 40. Click the **OK** button.

Step 41. Click the **OK** button

Step 42. The notes that you transfer are no longer available to you.

Step 43. Click the **Home** link.

Step 44. Congratulations! You have completed this lesson.

Transferring Performance Documents

Section 3, Lesson 1 Exercise - Scenario 2: Transferring Performance Documents

Procedure

In this lesson you will learn how to transfer a performance document.

Transfer to Manager Name: Best Manager

Employee: Test Employee KKB - #000000000016

Step 1. Click the **Manager Self Service** link.

Step 2. Click the **Performance Management** link.

Step 3. Click the **Performance Documents** link.

Step 4. Click the **Transfer Document** link.

You must consider what has taken place in the evaluation process before deciding to transfer a document.

If the finalized criteria step has been completed, it is recommended that the new manager starts a new document for the employee.

If the latter is the case, the current document should be completed or canceled by the prior manager.

Step 5. This page will list all of your direct reports' current performance documents.

Step 6. You will select the employee's document that you are transferring.

Click the **Test Employee KKB** option.

Step 7. Click the **Continue** button.

Step 8. You are transferring this document to a manager named Replacement Manager Change 1.

Step 9. Click the **Select a Manager** link.

Step 10. Click in the **Last Name** field.

Step 11. Enter the desired information into the **Last Name** field. Enter "**Manager**".

Step 12. Click the **Search** button.

Step 13. To ensure that you have selected the correct manager, review the details.

Click the **Details** button.

Step 14. Click the **Select This Person** button.

Step 15. Confirm the transfer.

Step 16. Click the **Save** button.

Step 17. Click the **OK** button.

Step 18. The document for Test Employee KKB is no longer listed.

Step 19. Click the **Home** link.

Step 20. Congratulations! You have completed this lesson.

Reopening Performance Documents

Section 3, Lesson 1 Exercise - Scenario 3: Reopening Performance Documents

Procedure

In this lesson you will learn how to reopen a performance document:

Employee Name: Test Employee GG #000000000036.

Step 1. Click the **Manager Self Service** link.

Step 2. Click the **Performance Management** link.

Step 3. Click the **Performance Documents** link.

Step 4. Click the **Reopen Document** link.

Step 5. Listed are current documents with their statuses for employees.

Step 6. When you reopen a document it takes it back to the previous status.

Step 7. Only specific statuses for documents can be changed back to Evaluation.

Step 8. The current status for Test Employee GG is Approval - Submitted.

Once you reopen it, the status will go back to Evaluation in Progress and the step will be Update and Submit for Approval.

Step 9. Click the **Test Employee GG** option.

Step 10. Click the **Continue** button.

Step 11. Click the **Save** button.

Step 12. Click the **OK** button.

Step 13. Now, you will review the current document to see what happens when it is reopened.

Step 14. Click the **Performance Documents** button.

Step 15. Click the **Current Documents** menu.

Step 16. You can already see the status change on this page.

Step 17. Click the **Home** link.

Step 18. Congratulations! You have completed this lesson.

Canceling Performance Documents

Section 3, Lesson 1 Exercise - Scenario 4: Canceling Performance Documents

Procedure

In this lesson you will learn how to cancel a performance document for Test Employee KKB.

Step 1. Click the **Manager Self Service** link.

Step 2. Click the **Performance Management** link.

Step 3. Click the **Performance Documents** link.

Step 4. Click the **Cancel Document** link.

Only documents in certain statuses can be canceled: **Define Criteria** and **Evaluation in Progress**.

Step 5. Click the **Test Employee KKB Short Document** option.

Step 6. Click the **Continue** button.

Step 7. Click the **Save** button.

Step 8. Click the **OK** button.

Step 9. The Short Document for Test Employee KKB is no longer listed.

Step 10. Click the **Home** link.

Step 11. Congratulations! You have completed this lesson.

Deleting Performance Documents

Section 3, Lesson 1 Exercise - Scenario 5: Deleting Performance Documents

Procedure

In this lesson you will learn how to delete a performance document for Test Employee KKB.

Step 1.	Click the **Manager Self Service** link.
Step 2.	Click the **Performance Management** link.
Step 3.	Click the **Performance Documents** link.
Step 4.	Click the **Delete Document** link.
Step 5.	Before a Performance document can be **deleted,** it must be **canceled first**. You will delete the document that you canceled in the previous lesson.
Step 6.	Click the **Test Employee KKB** option.
Step 7.	Click the **Continue** button.
Step 8.	Click the **Save** button.
Step 9.	Click the **OK** button.
Step 10.	The document is no longer listed.
Step 11.	Click the **Home** link.
Step 12.	Congratulations! You have completed this lesson.

S4 - Agency Administrator Activities

Creating a Short Performance Document

Section 4, Lesson 1 Exercise - Scenario 1: Creating a Short Performance Document

Procedure

In this lesson you will learn how to create a Short Performance Document as an Agency Administrator.

The process is the same when creating any of the Performance Document Types.

You will use the following employees:

Name 1) Employee KKB - #000000000016
Name 2) Employee GG - #000000000036

Step 1. All **Agency Administrators** will navigate to Performance Management activities through **Workforce Development**.

You will not use Manager Self Service.

Step 2. Click the **Workforce Development** link.

Step 3. Click the **Performance Management** link.

Step 4. Click the **Create Documents** link.

The difference with **Creating Documents** as an agency administrator is that you are running a process to create documents.

Step 5. If this is the **first time** that you have run this process, you will create a **Run Control ID** and **Add it as a New Value**.

Step 6. The next time you run this process you will use **Find an Existing Value** and enter the **Run ID** that was created.

Step 7. Click the **Add a New Value** tab.

Step 8. The **Run Control Id field** can hold 36 characters but you cannot use any spaces.

You should name your **Run Control ID** something unique to the process that you are running so that you can easily find it.

Step 9. In this example you are creating documents using the Statewide Short Document Type.

Enter the desired information into the **Run Control ID** field. Enter "**SHORT_DOC**".

Step 10. When you are running this process for Statewide Long, 6 month etc. you will create a Run Control Id for each.

It saves the parameters that you use.

Step 11. Click the **Add** button.

Step 12. Enter the desired information into the **Period Begin Date** field. Enter "**01012019**".

Step 13. Click in the **Period End Date** field.

Step 14. Enter the desired information into the **Period End Date** field. Enter "**12312019**".

Step 15. Click the **Document Type** list.

You will select the **Document Type** that is appropriate for your agency.

Step 16. Click the **Statewide Short Document Type** list item.

Step 17. Click the **Template ID** list.

Step 18. Click the **Statewide Short Eval Form** list item.

Step 19. Click the **Manager Selection Method** list.

Step 20. Click the **By Reports To Position** list item.

Step 21. Click the **Employee ID** option.

Step 22. Click the **Look up Empl ID** button.

When there are more than 300 results, use one of the Search fields to narrow the search results.

Step 23. Click the scrollbar.

Step 24. Click the **00000000036** link.

Step 25. You may add additional employees if you have more than one with the same **Run Request Parameters** above.

Click the **Add a new row at row 1** button.

Step 26. Click the **Look up Empl ID** button.

Step 27. Click the **00000000016** link.

Step 28. Click the **Run** button.

Step 29. You will not need to change any of the settings on this page.

Step 30. Click the **OK** button.

Step 31. Click the **Process Monitor** link.

Step 32. Whenever there is a process or a report being run, you will see a page similar to this one. It contains the process information.

Step 33. This is the **Instance number** that you just saw for the process being run.

Step 34. There is a **Process Name and User ID** along with the **Run Date and Time**.

Step 35. The **Run Status** will go from **Initiated** to **Queued** to **Success** and the **Distribution status** will change to **Posted** once selecting the **Refresh** button above.

Step 36. Click the **Refresh** button.

Step 37. Notice how the **Run and Distribution Statuses** changed to Success and Posted.

This means that the process ran successfully.

Step 38. Now you will navigate to view documents to confirm that they ran successfully.

Step 39. Click the **Performance Documents** link.

Step 40. Click the **View Documents** menu.

Step 41. You are going to search for one of the documents that was just created.

You can use any of these fields to search.

Step 42. Click the **Look up Employee ID** button.

Step 43. Click the **00000000016** link.

Step 44. Click the **Search** button.

Step 45. The **Performance Document** will be listed referenced by the Empl ID, Name, Doc Type, and Document Status (Evaluation in Progress).

Step 46. The manager will see the same when they navigate to their Current Documents.

Step 47. Click the **Home** link.

Step 48. Congratulations! You have completed this lesson.

Viewing Performance Documents

Section 4, Lesson 1 Exercise - Scenario 2: Viewing Performance Documents

Procedure

In this lesson you will learn how to View a Performance Document that is in an Approval Status.

Step 1. Click the **Workforce Development** link.

Step 2. Click the **Performance Management** link.

Step 3. Click the **View Documents** link.

Step 4. Enter the desired information into the **Manager First Name** field. Enter "**New**".

Step 5. Enter the desired information into the **Last Name** field. Enter "**Manager**".

Step 6. Click the **Document Type** list.

Step 7. Click the **Statewide Long Document Type** list item.

Step 8. Click the **Document Status** list.

Step 9. Click the **Approval** list item.

Step 10. Click the **Search** button.

Step 11. Click the **Test Employee GG** link.

Step 12. Click the **Home** link.

Step 13. Congratulations! You have completed this lesson.

Transferring Performance Documents

Section 4, Lesson 1 Exercise - Scenario 3: Transferring Performance Documents

Procedure

In this lesson you will learn how to transfer performance documents as an Agency Administrator.

From Manager Name: New Manager
To Manager Name: Manager Portal
Employee ID: Test Employee T - #000000000012

Step 1. Click the **Workforce Development** link.

Step 2. Click the **Performance Management** link.

Step 3. Click the **Performance Documents** link.

Step 4. Click the **Transfer Document** link.

Step 5. Enter the desired information into the **Manager First Name** field. Enter "**New**".

Step 6. Enter the desired information into the **Last Name** field. Enter "**Manager**".

Step 7. Click the **Look up Employee ID (Alt+5)** button.

Step 8. Click the **00000000012** link.

Step 9. Click the **Search** button.

You must consider what has taken place in the evaluation process before deciding to transfer a document.

If the finalized criteria step has been completed, it is recommended that the new manager starts a new document for the employee.

If the latter is the case, the current document should be completed or canceled by the prior manager.

Step 10. This page will list all of the current performance documents for the specified manager.

Step 11. You will select the employee's document that you are transferring.

Step 12. Click the **Test Employee DEFG** option.

Step 13. Click the scrollbar.

Step 14. Click the **Continue** button.

Step 15. You are transferring this document to a manager named Manager Portal.

Step 16. Click the **Select a Manager** link.

Step 17. Enter the desired information into the **Name** field. Enter "**Manager**".

Step 18. Click the **Search** button.

Step 19. To ensure that you have selected the correct manager, review the details.

Click the **Details** button.

Step 20. Click the **Select This Person** button.

Step 21. Click the **Save** button.

Step 22. Click the **OK** button.

Step 23. The document for Test Employee T is no longer listed.

Step 24. Click the **Home** link.

Step 25. Congratulations! You have completed this lesson.

Reopening Performance Documents

Section 4, Lesson 1 Exercise - Scenario 4: Reopening Performance Documents

Procedure

In this lesson you will learn how to reopen a performance document for:

Manager Name: New Manager
Employee Name: Test Employee KKB #000000000016.

Step 1. Click the **Workforce Development** link.

Step 2. Click the **Performance Management** link.

Step 3. Click the **Administrative Tasks** link.

Step 4. Click the **Reopen Document** link.

Step 5. Enter the desired information into the **Manager First Name** field. Enter "**new**".

Step 6. Enter the desired information into the **Last Name** field. Enter "**manager**".

Step 7. Click the **Search** button.

Step 8. Listed are current documents with their statuses.

When you reopen a document it takes it back to the previous status.

Step 9. The current status for Test Employee KKB is Shared with Employee.

Step 10. Once you reopen, the status will go back to Evaluation in Progress.

Step 11. Click the **Test Employee KKB** option.

Step 12. Click the scrollbar.

Step 13. Click the **Continue** button.

Step 14. Click the **Save** button.

Step 15. Click the **OK** button.

Step 16. Now, you will review the current document to see what happened when it is reopened.

Step 17. Click the **Performance Documents** button.

Step 18. Click the **View Documents** menu.

Step 19. Enter the desired information into the **Manager First Name** field. Enter "**new**".

Step 20. Enter the desired information into the **Last Name** field. Enter "**manager**".

Step 21. Click the **Search** button.

Step 22. You can already see the status change on this page.

Step 23. Click the **Home** link.

Step 24. Congratulations! You have completed this lesson.

Canceling Performance Documents

Section 4, Lesson 1 Exercise - Scenario 5: Canceling Performance Documents

Procedure

In this lesson you will learn how to cancel a performance document for Test Employee DEFG.

Step 1. Click the **Workforce Development** link.

Step 2. Click the **Performance Management** link.

Step 3. Click the **Performance Documents** link.

Step 4. Click the **Cancel Document** link.

Step 5. Enter the desired information into the **Manager First Name** field. Enter "**Manager**".

Step 6. Enter the desired information into the **Last Name** field. Enter "**Portal**".

Step 7. Click the **Search** button.

Step 8. As an Agency Admin, you are able to cancel documents with any status for all managers.

Step 9. Click the **Test Employee DEFG** option.

Step 10. Click the **Continue** button.

Step 11. Click the **Save** button.

Step 12. Click the **OK** button.

Step 13. Click the **Home** link.

Step 14. Congratulations! You have completed this lesson.

Deleting Performance Documents

Section 4, Lesson 1 Exercise - Scenario 6: Deleting Performance Documents

Procedure

In this lesson you will learn how to delete a performance document for Test Employee DEFG.

Step 1. Click the **Workforce Development** link.

Step 2. Click the **Performance Management** link.

Step 3. Click the **Performance Documents** link.

Step 4. Click the **Delete Document** link.

Step 5. Before a Performance document can be deleted, it must be canceled first.

You will delete the document that you canceled in the previous lesson.

Step 6. Enter the desired information into the **Manager First Name** field. Enter "**Manager**".

Step 7. Enter the desired information into the **Last Name** field. Enter "**Portal**".

Step 8. Click the **Search** button.

Step 9. Click the **Test Employee DEFG** option.

Step 10. Click the **Continue** button.

Step 11. Click the **Save** button.

Step 12. Click the **OK** button.

Step 13. Click the **Home** link.

Step 14. Congratulations! You have completed this lesson.

Reporting - Queries

Evaluation Doc Status

Section 4, Lesson 2 Exercise - Scenario 1: Evaluation Doc Status Query

Procedure

In this lesson you will learn how to run a query named - Evaluation Doc Status. It will retrieve document statuses using the criteria specified.

You will use the following parameters:

1) Agency: T32
2) Dept: 2000
3) Manager ID: 00000000239

Step 1. Click the **Reporting Tools** link

Your security access will only allow you to run queries that have already been created.

Step 2. Click the **Query Viewer** link.

Step 3. The ePerformance queries are stored within a folder that has the prefix: TX_eP

Enter the desired information into the **begins with** field. Enter "**tx_ep**".

Step 4. Click the **Search** button.

Step 5. All of the queries that begin with TX_EP are listed. There is also a description for each of them.

Step 6. Queries can be run multiple ways.

When running using **HTML**, the results are displayed on the screen first and there will be a link to download into Excel where you can Open/Save or Cancel.

When running to **Excel,** the results are not displayed on the screen first but they will be downloaded into Excel and you have the option to Open/Save or Cancel.

Step 7. Run to **XML**, **Schedule,** and **Definitional References** will not be used.

Step 8. **Add to Favorites** allows you to save frequently used Queries to be listed first when using Query Viewer. This option will not be covered in this training.

Step 9. Go ahead and run the Evaluation Doc Status Query.

Click the **HTML** link.

Step 10. You will select or enter information in the fields provided, as applicable.

For certain queries, all fields may be required.

Enter the desired information into the **Agency** field. Enter "**t32**".

Step 11. Enter the desired information into the **Department** field. Enter "**2000**".

Step 12. Click the **Look up Manager/Mentor ID (Alt+5)** button.

Step 13. Click the **00000000239** link.

Step 14. For this example, you will leave the **Document Status** and **Approval Status** blank.

Step 15. This will bring up results with all document and approval statuses.

Step 16. The fields listed tell you what information will be provided on the query.

Step 17. Click the **View Results** button.

Step 18. As you can see there is quite a bit of information that was retrieved so you may want to download to an Excel spreadsheet.

Yes, you could have made that selection instead of HTML on the previous screen.

Click the **Excel Spreadsheet** link.

Step 19. This is where you can either Open/ Save to Excel.

Step 20. For training, you will Cancel.

Click the **Cancel** button.

Step 21. Click the **Close Tab (Ctrl+W)** button.

Step 22. Click the **Home** link.

Step 23. Congratulations! You have completed this lesson.

Document with Attachments

Section 4, Lesson 2 Exercise - Scenario 2: Document with Attachments Query

Procedure

In this lesson you will learn how to run a query named - Document with Attachments. It will search and find if there are any documents with attachments using the criteria specified.

You will use the following parameters:

1) Agency: T32
2) Leave all other fields blank

Step 1. Click the **Reporting Tools** link.

Step 2. Click the **Query Viewer** link.

Step 3. Enter the desired information into the **begins with** field. Enter "**tx_ep**".

Step 4. Click the **Search** button.

Step 5. Click the **HTML** link.

Step 6. Enter the desired information into the **Agency** field. Enter "**t32**".

Step 7. Click the **View Results** button.

Step 8. Click the scrollbar.

Step 9. You may not need to download to Excel if you only wanted to see the results. But if you do, continue...

Click the **Excel Spreadsheet** link.

Step 10. In training, you will Cancel.

Step 11. Click the **Cancel** button.

Step 12. Click the **Close Tab (Ctrl+W)** button.

Step 13. Click the **Home** link.

Step 14. Congratulations! You have completed this lesson.

Manager Override

Section 4, Lesson 2 Exercise - Scenario 3: Manager Override Query

Procedure

In this lesson you will learn how to run a query named - Manager Override. It will search and retrieve Override Employee Acknowledgements entered using the criteria specified.

You will use the following parameters:

1) Agency: T32
2) Leave all other fields blank (for all)

Step 1. Click the **Reporting Tools** link.

Step 2. Click the **Query Viewer** link.

Step 3. Enter the desired information into the **begins with** field. Enter "**tx_ep**".

Step 4. Click the **Search** button.

Step 5. Click the **HTML** link.

Step 6. Enter the desired information into the **Agency** field. Enter "**t32**".

Step 7. Click the **View Results** button.

Step 8. Click the **Close Tab (Ctrl+W)** button.

Step 9. Click the **Home** link.

Step 10. Congratulations! You have completed this lesson.

Employees without Evaluations

Section 4, Lesson 2 Exercise - Scenario 4: Employees without Evaluation Query

Procedure

In this lesson you will learn how to run a query named - Employee without Evaluations. It will search and find any employees without evaluations within the agency/dept specified.

You will use the following parameters:

1) Agency: T32

Step 1.	Click the scrollbar.
Step 2.	Click the **Reporting Tools** link.
Step 3.	Click the **Query Viewer** link.
Step 4.	Enter the desired information into the **begins with** field. Enter "**tx_ep**".
Step 5.	Click the **Search** button.
Step 6.	Click the **HTML** link.
Step 7.	Enter the desired information into the **Agency** field. Enter "**t32**".
Step 8.	Click the **Look up Agency (Alt+5)** button.
Step 9.	Click the **T32** link.
Step 10.	Click the **View Results** button.
Step 11.	Click the **Excel Spreadsheet** link.
Step 12.	Click the **Cancel** button.
Step 13.	Click the **Close Tab (Ctrl+W)** button.
Step 14.	Click the **Home** link.
Step 15.	Congratulations! You have completed this lesson.

Audit History

Section 4, Lesson 2 Exercise - Scenario 5: Audit History Query

Procedure

In this lesson you will learn how to run a query named - Audit History. It will search and find documents that have a status of Shared with Employee and provide the audit details for this status.

You will use the following parameters:

1) Agency: T32
2) Status: Shared with Employee

Step 1. Click the **Reporting Tools** link.

Step 2. Click the **Query Viewer** link.

Step 3. Enter the desired information into the **begins with** field. Enter "**tx_ep**".

Step 4. Click the **Search** button.

Step 5. Click the **HTML** link.

Step 6. Enter the desired information into the **Agency** field. Enter "**t32**".

Step 7. Click the **Status** list.

Step 8. Click the **Shared with Employee** list item.

Step 9. Click the **View Results** button.

Step 10. Click the scrollbar.

Step 11. Click the **Close Tab (Ctrl+W)** button.

Step 12. Click the **Home** link.

Step 13. Congratulations! You have completed this lesson.