Performance Management for ePerformance Support

Job Aid

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Revision History

Version	Date Updated	Summary of Changes	Author
1.0	9/10/19	Original Document	IBM
2.0	2/28/20	Updated to new HR Links Template	IBM
3.0	4/27/20	Removed Section 3 “Maintain Content Catalogue”	IBM

Introduction

This document provides instructions for common tasks in the ePerformance Support role in HR Links.

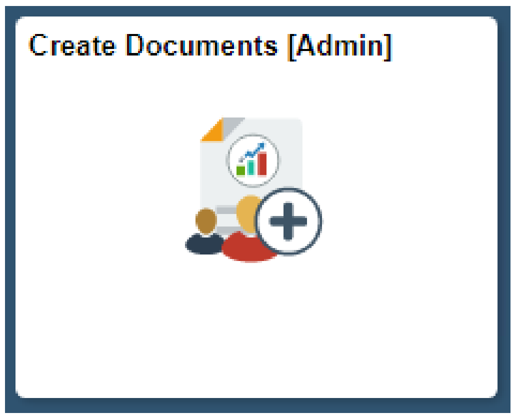
Section 1: HR Support Tasks

This section provides ePerformance Support with information about completing administrative tasks in the ePerformance component of HR Links.

Topic 1.1: Create New Documents

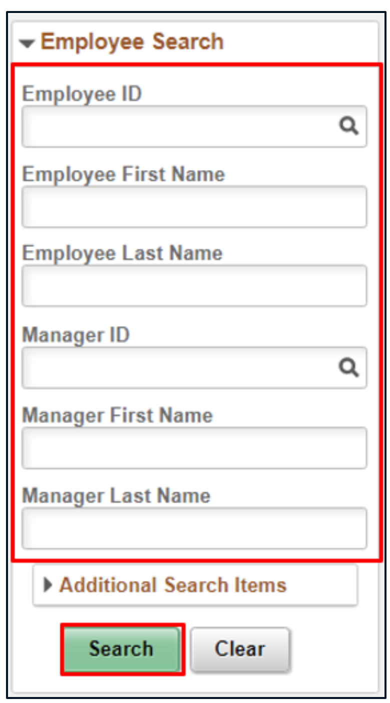
1.1.1 Create New Performance Document

1 Select the Create Documents [Admin] tile.



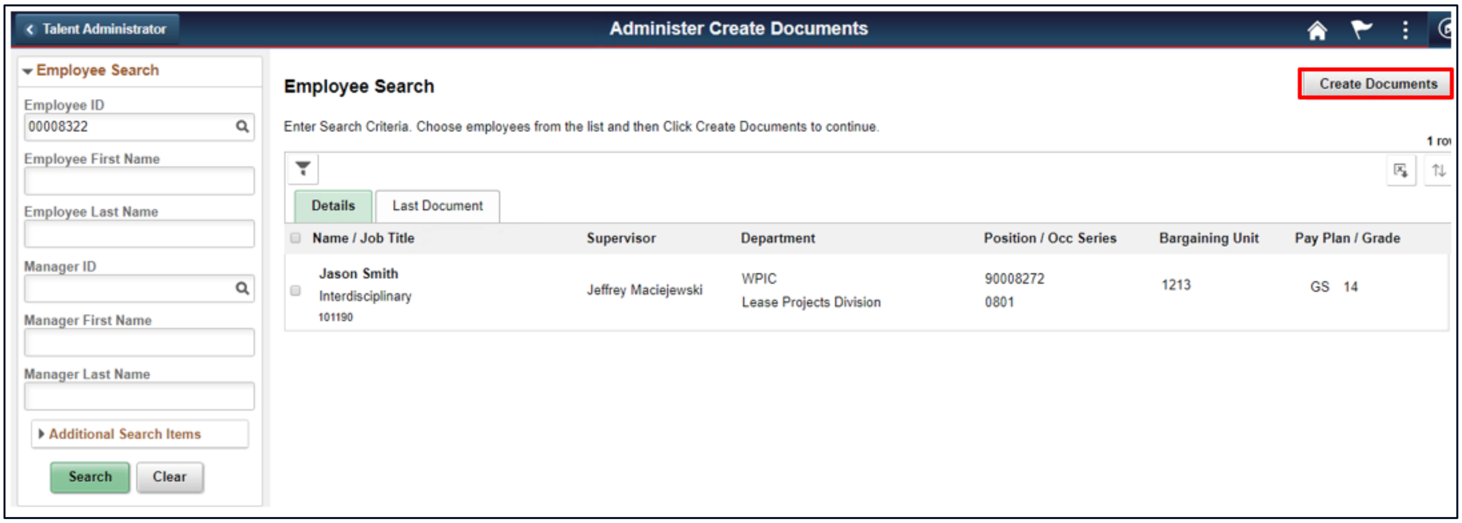
2 Enter the search criteria of the desired employee.

3 Select Search.



4 Select the employee from the search results.

5 Select Create Documents.



6 Select Period Begin Date and Period End Date.

7 Select Performance Document from the Document Type drop-down menu.

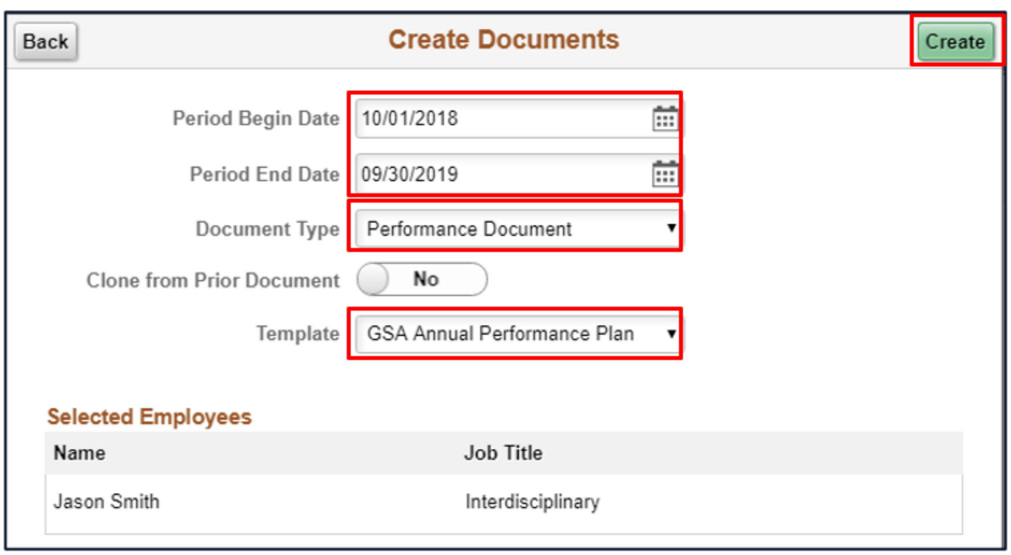
8 Be sure that the *Clone from Prior Document* switch is set to No.

Note: If you would like to clone a new performance document from an existing one, see the Clone a New Performance Document from Existing Performance Document section below.

9 Use the *Template* drop-down to select GSA Annual Performance Plan.

Note: Other options include Mass Approval and OIG Template. Do not use Mass Approval. The OIG Template will be used for GSA OIG ePerformance.

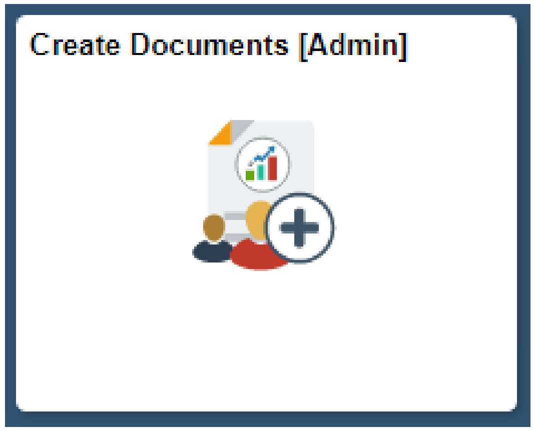
10 Select Create.



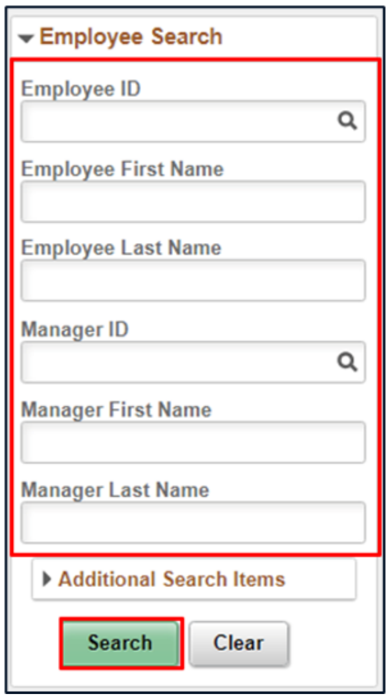
The document will appear in the employee's *Current Documents*.

1.1.2 Clone a Performance Document from an Existing Performance Document

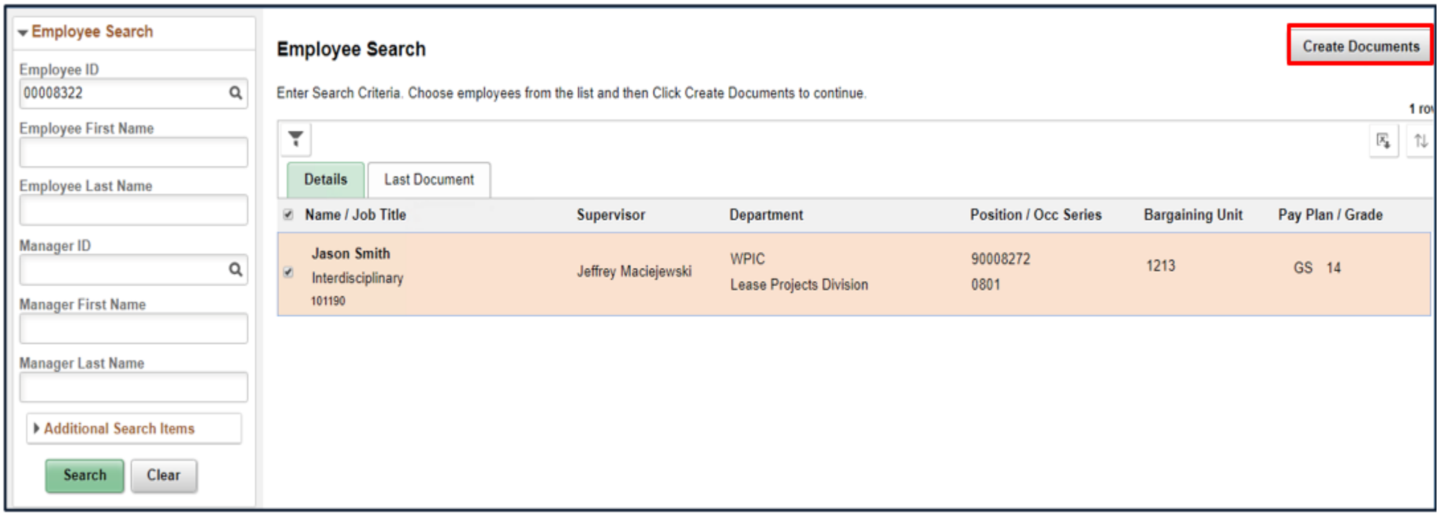
1. Select the Create Documents [Admin] tile.



2. Enter search criteria to find the correct manager.
3. Select Search.



4. Select the employees from the list of search results.
5. Select Create Documents.



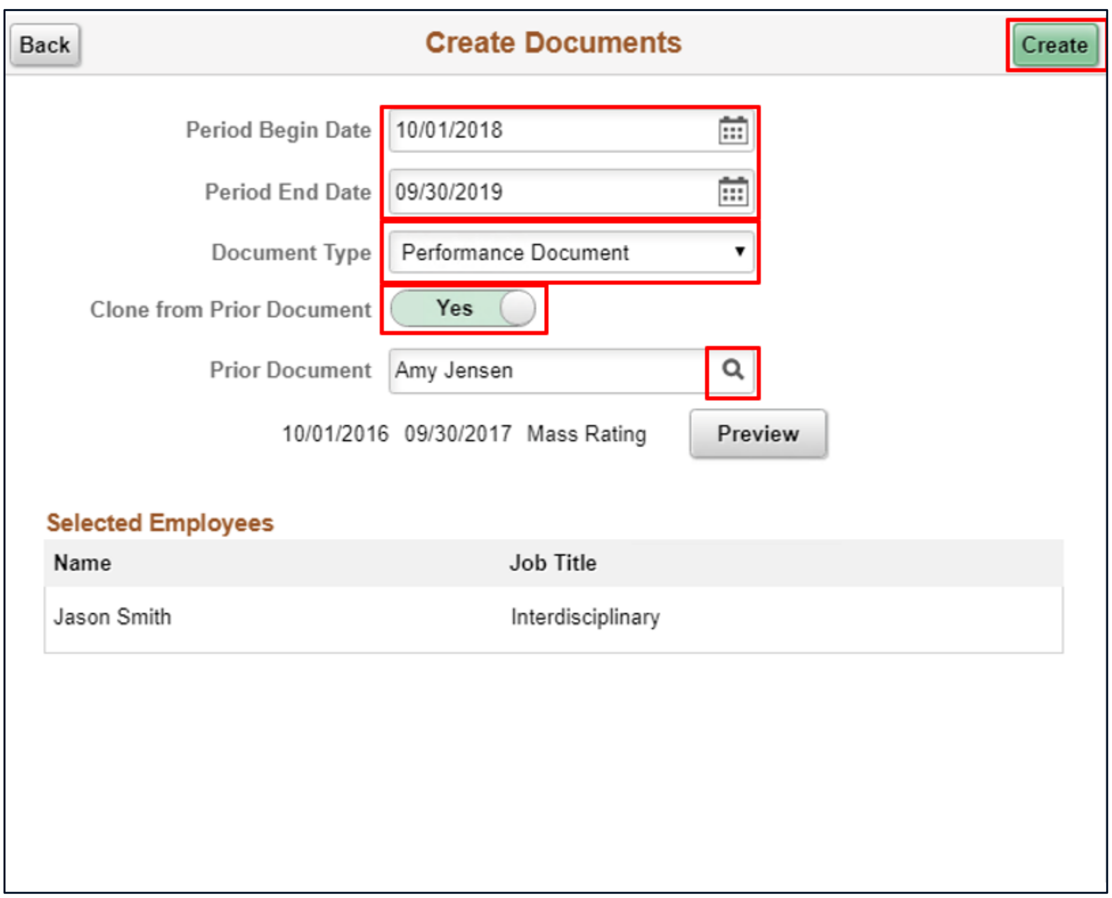
6 Select Period Begin Date and Period End Date.

7 Select Performance Document from the *Document Type* drop-down menu.

8 Toggle the *Clone from Prior Document* switch to Yes.

9 Use the lookup icon to select the associated prior document.

10 Select Create.

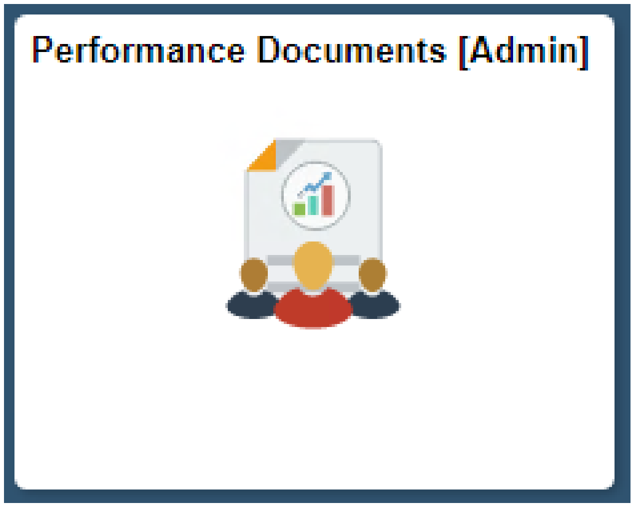


The new document will appear in the employee's *Current Documents*.

Topic 1.2: Change Document Reviewers

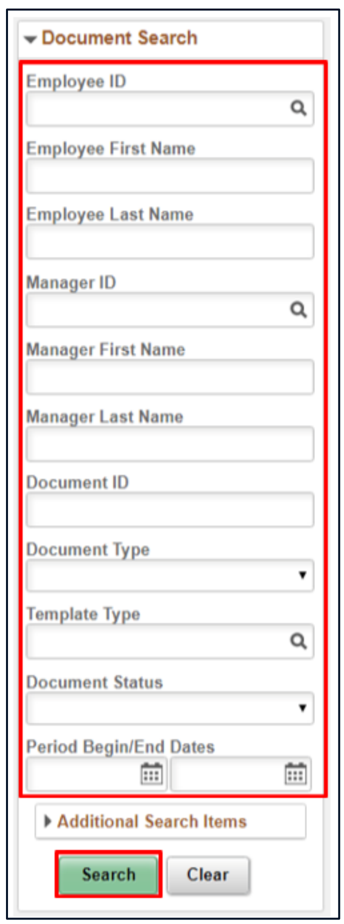
1.2.1 Transfer Document Supervisor

1 Select the Performance Documents [Admin] tile.



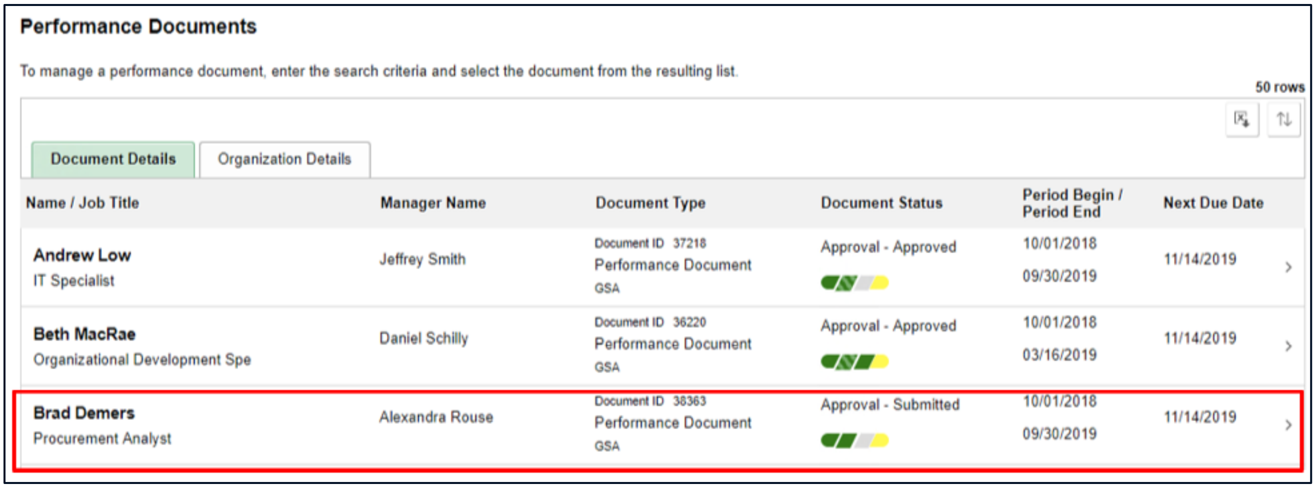
2 Enter the search criteria of the desired employee.

3 Select Search.

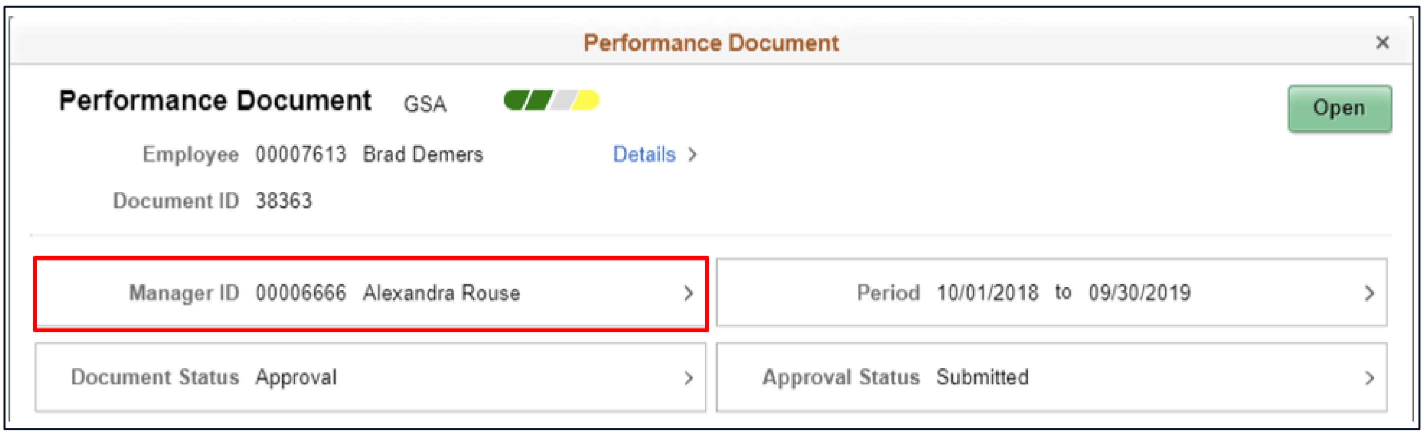


4 Select the employee's performance document.

<u>Note</u>: This document must be in Approval – Submitted status.



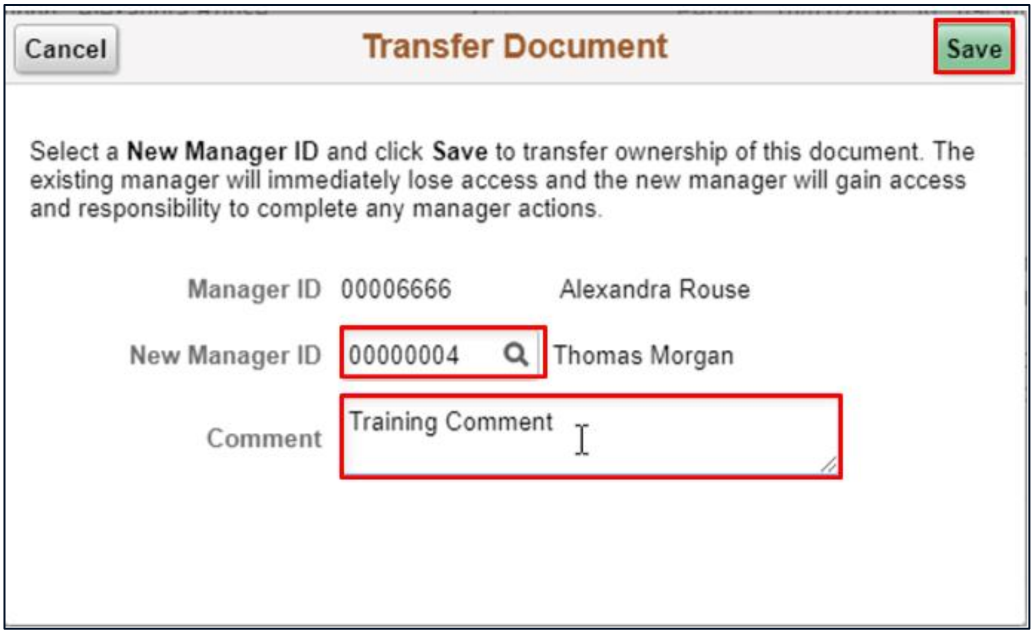
5 Select the Manager ID tab.



6 Use the lookup function in the New Manager ID field to enter a new reviewer.

7 Enter comments in the Comment field.

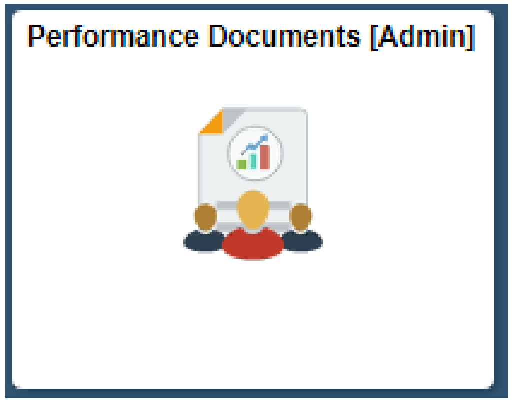
8 Select Save.


Cancel
Transfer Document
Save
Select a New Manager ID and click Save to transfer ownership of this document. The existing manager will immediately lose access and the new manager will gain access and responsibility to complete any manager actions.
Manager ID 00006666 Alexandra Rouse
New Manager ID 00000004 Thomas Morgan
Comment Training Comment

1.2.2 Change Document Approver

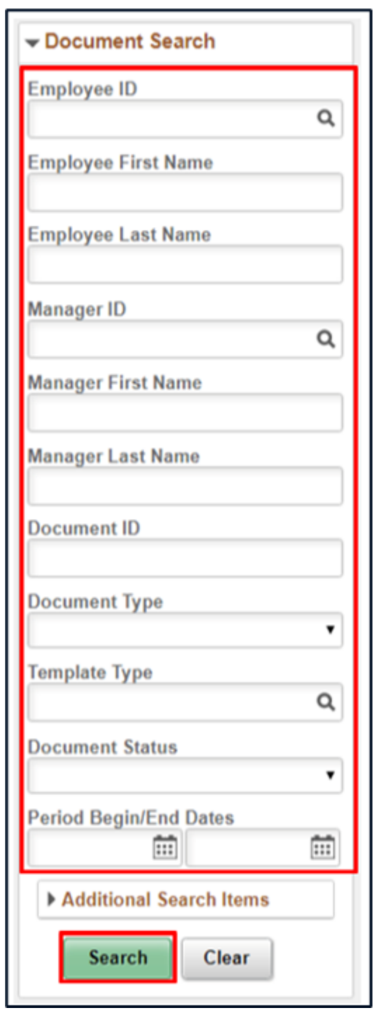
Administrators may change the designated approver of a performance document after the document has been submitted for approval. To change a document reviewer, follow these steps:

1 Select the Performance Documents [Admin] tile.

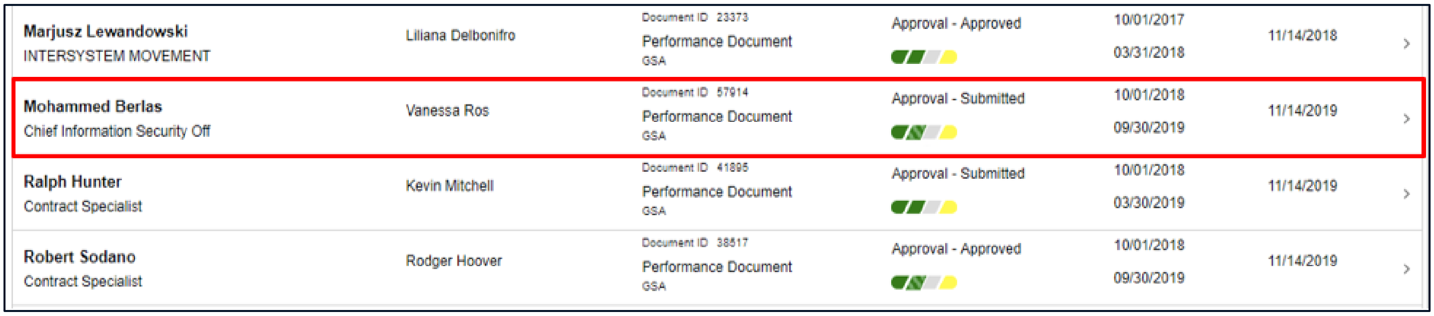


2 Enter search criteria to find the correct employee.

3 Select Search.

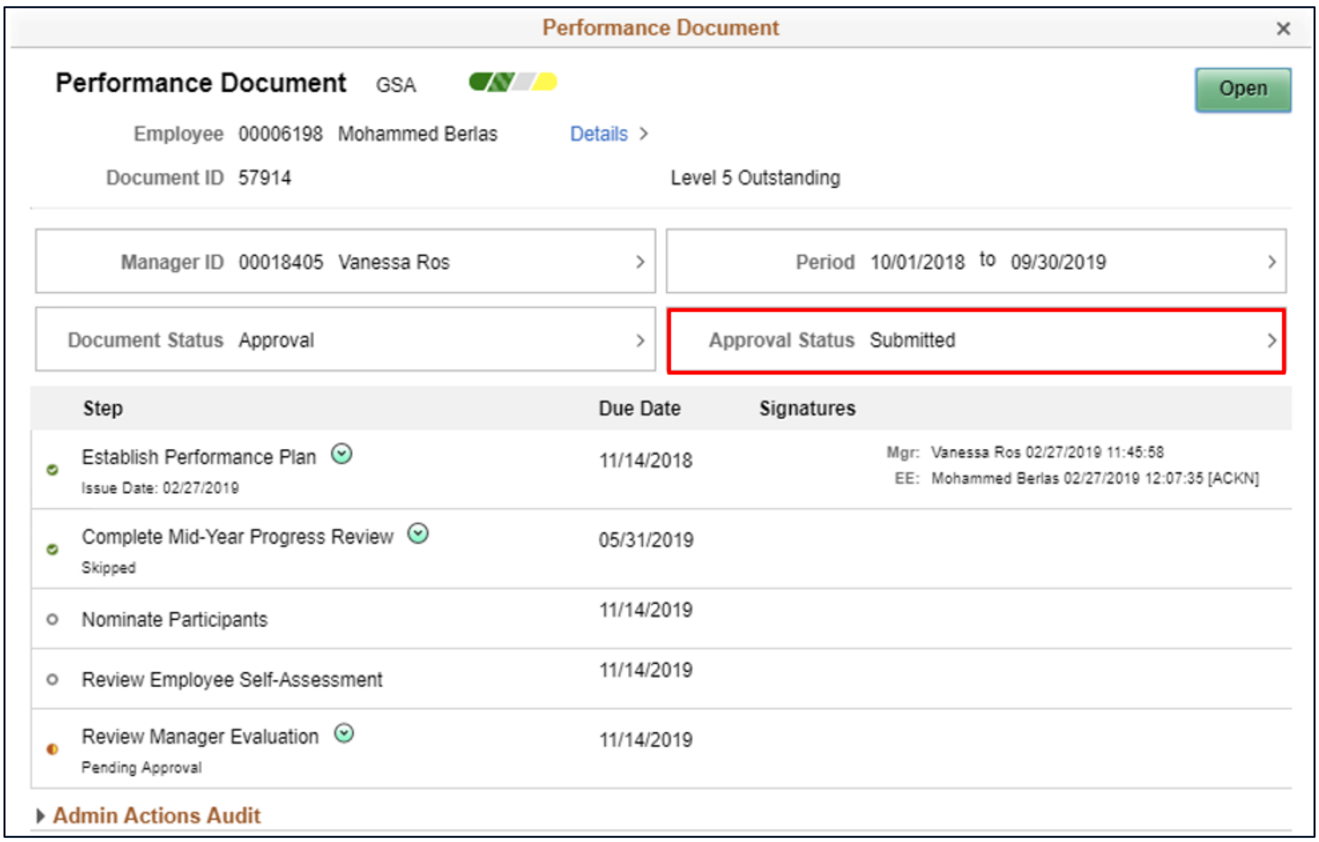


4 Select the performance document on which you want to change an approver.



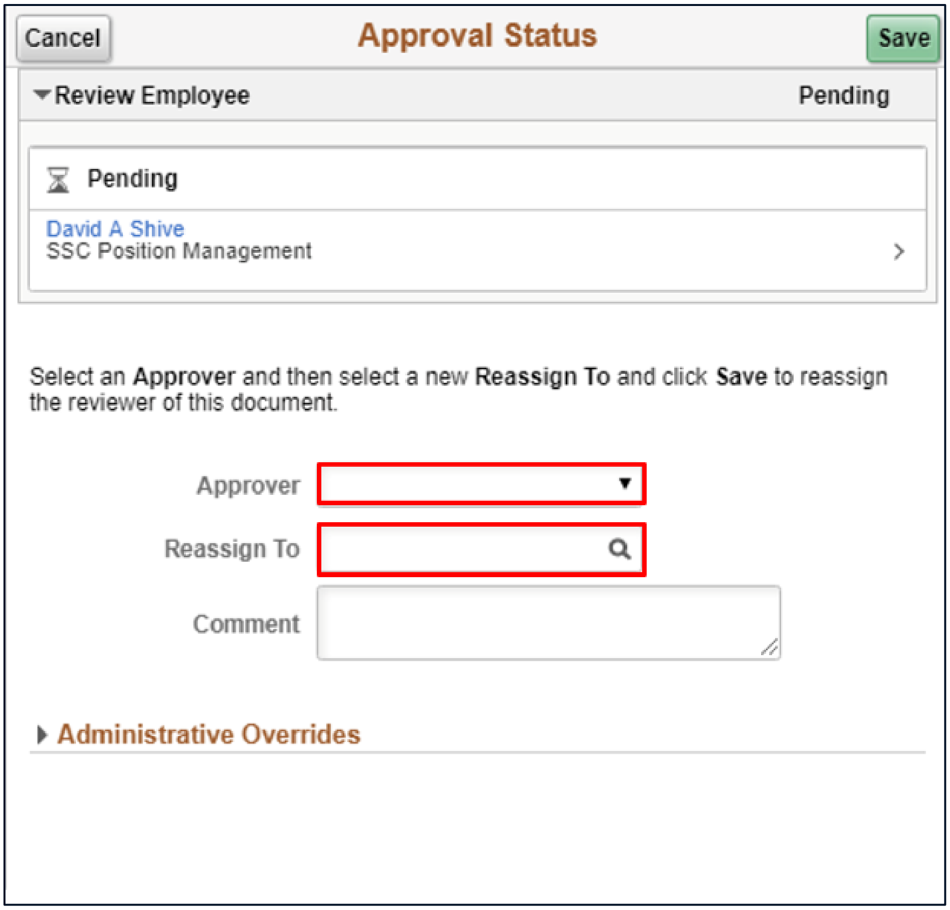
Note: The document must be in Approval – Submitted status.

5 Select the Approval Status tab.



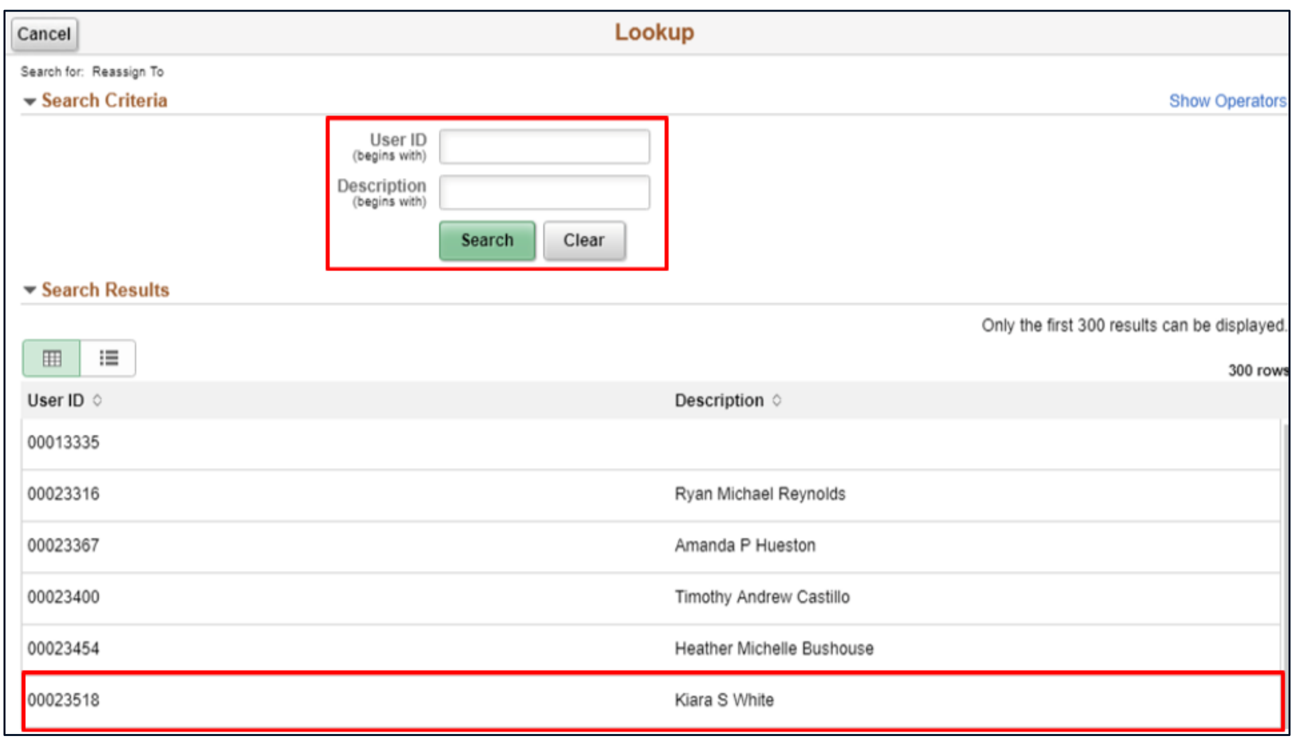
6 Select the Approver you wish to change from the drop-down menu.

7 Use the *Reassign To* lookup icon to select the document's new approver.



8 Enter search criteria to find the new approver.

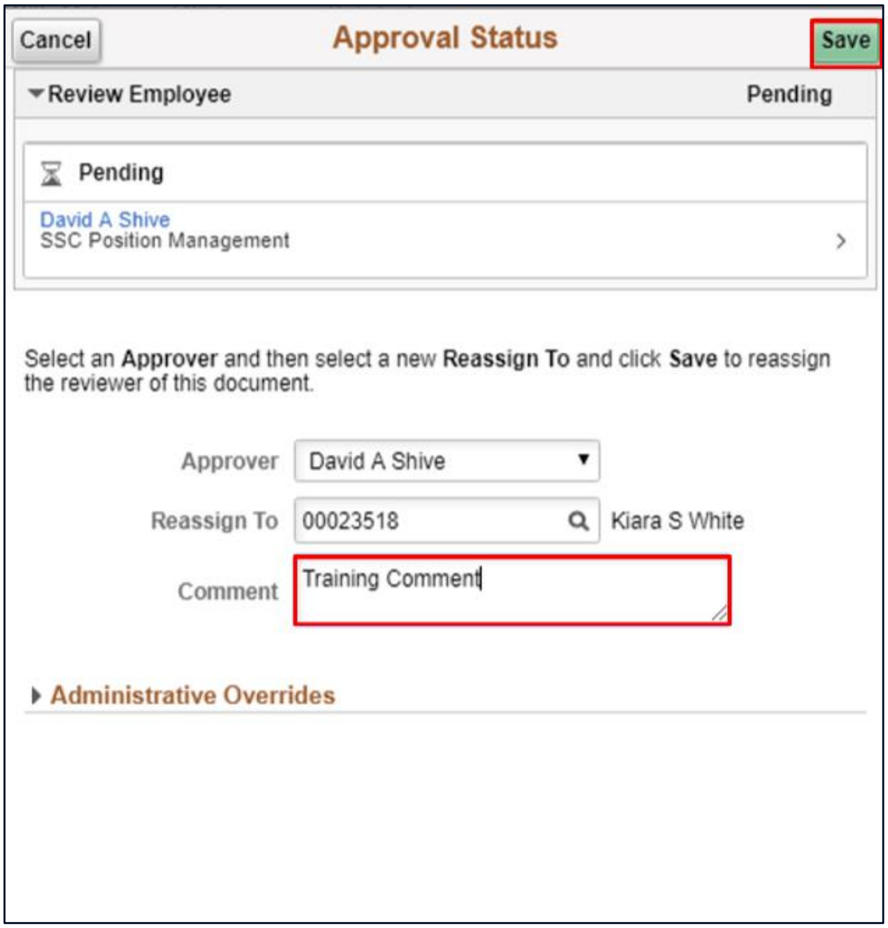
9 Select the new approver from the search results.



Note: The new Approver will be added at the same level as the previous reviewer.

10 Add a comment in the Comment section, if applicable.

11 Select Save.



Section 2: Create and Manage Business Objectives

Topic 2.1: Create Business Objectives

This topic will cover creating business objectives. Business Objectives are organizational goals/objectives that are cascaded down to employee performance plans, to align to performance elements.

As an ePerformance Administrator, you can complete every step in the process of creating and cascading business objective, or you can assign another user as the business objective owner. While a business objective owner can update and submit objectives for publication, only an ePerformance Administrator can publish the objectives.

To begin the process of creating business objectives, you need to identify at what organizational level you want to add objectives. The example below demonstrates how organizational objectives are cascaded down to lower level organizations when the lower level organization does not add objectives. For example, organization A published organizational objectives, but organizations B, D and E did not. Based on the organizational hierarchy, the objectives from A will automatically cascade down to organizations B, D and E.

On the right side of the organizational tree, organizations C and G have published organizational objectives, but organization F does not. Based on the organizational hierarchy, the objectives from organization C will flow down to organization F.

In the graphic below, the cascading of objectives we discussed above is represented using colors. All organizational "nodes" shown in the same color will have the same organizational objectives available to align to performance elements.

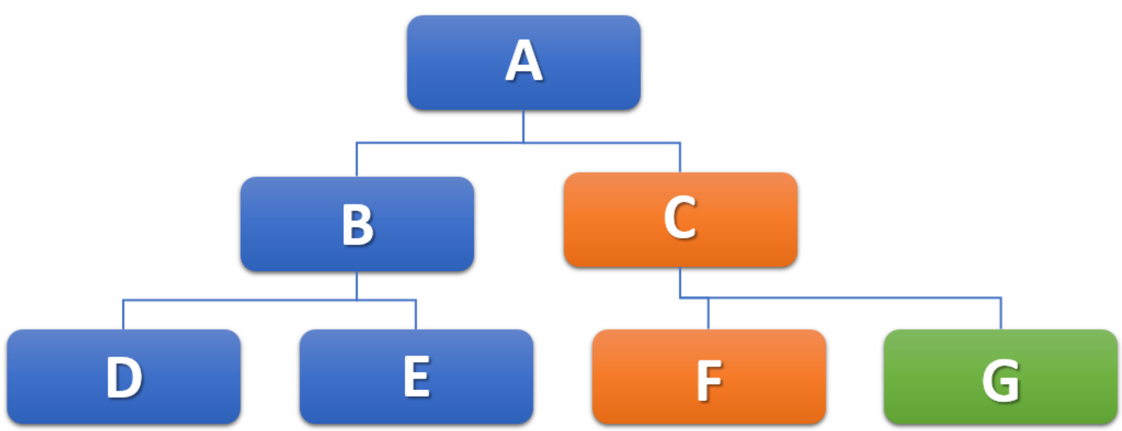


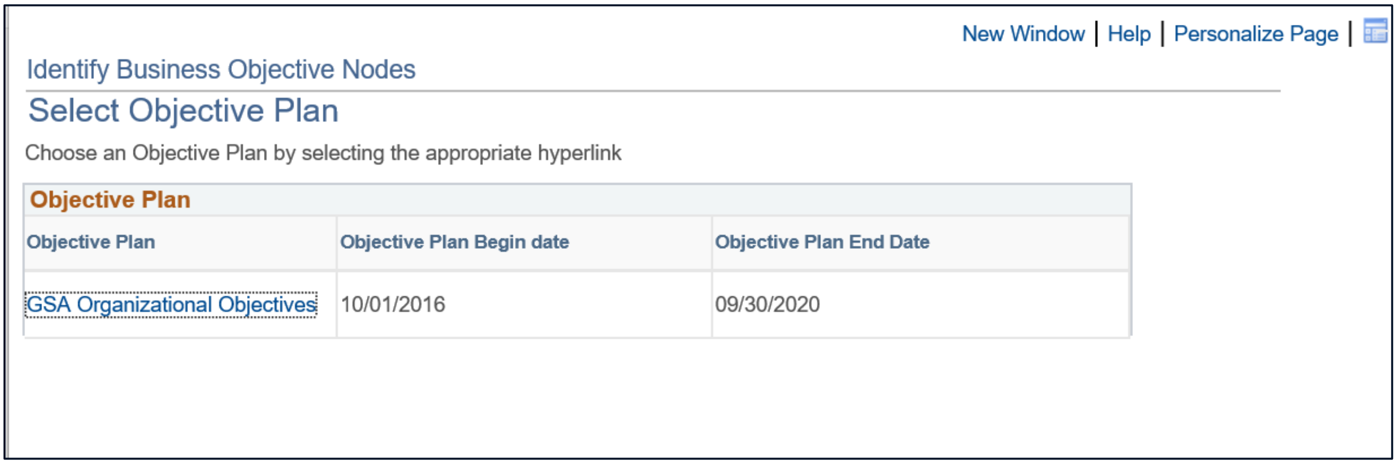
Figure 1: Cascading Organizational Objectives

To begin, identify the organizational "nodes" that will be adding business objectives.

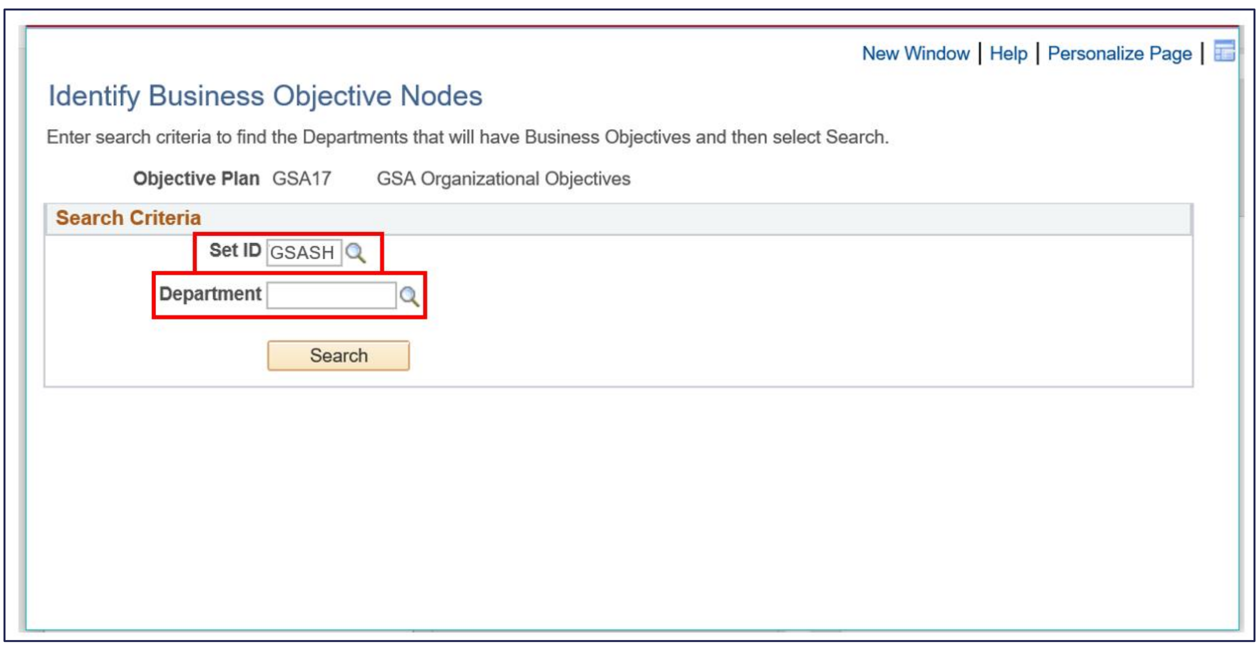
2.1.1 Identify Objective Nodes

Navigation: Main Menu > Workforce Development > Performance Management > Business Objectives and Identify Objective Nodes

1. Select the GSA Organizational Objectives plan.



2. In the *Set ID* field, select GSASH by selecting the magnifying glass to open the menu.
3. Select the magnifying glass next to the *Department* field to view and select the Department for which you want to add business objectives.
4. Select Search.



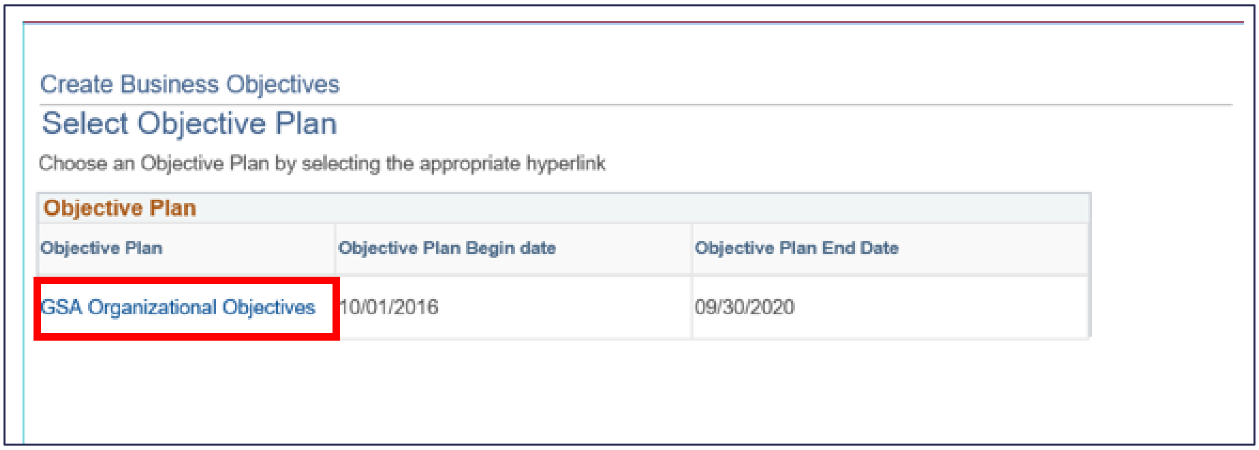
5. If there are departments reporting to the department selected, they will be shown in a table below the *Target Department* table, in the *Direct Reports* table. Select all of the Departments for which you want to add organizational objectives.
6. Select Save.

Next, create business objectives for the identified organizational nodes.

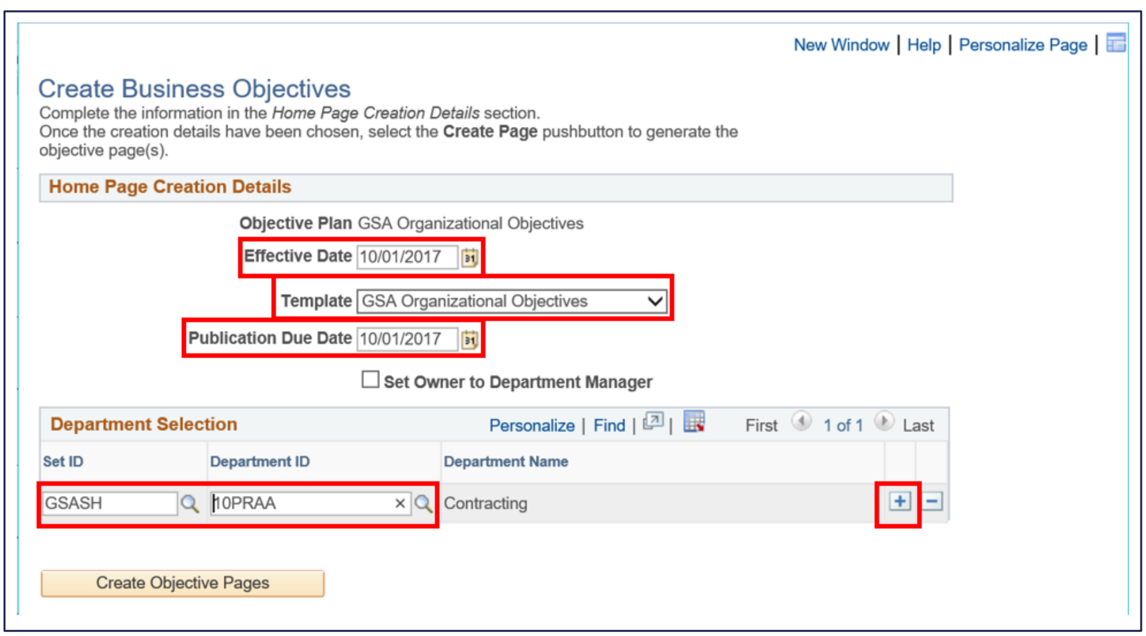
2.1.2 Create Business Objectives

Navigation: Main Menu > Workforce Development > Performance Management > Business Objectives > Create Business Objectives

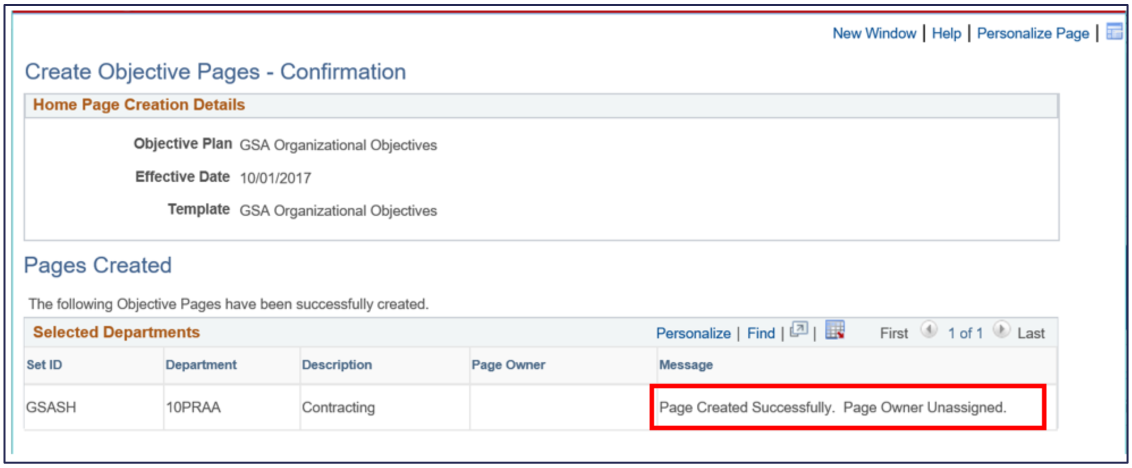
1. Select GSA Organizational Objectives



2. On the *Create Business Objectives* page, select the applicable dates for the Effective Date and Publication Due Date fields.
3. Select GSA Organizational Objectives from the *Template* drop-down menu.
4. Select GSASH from the *Set ID* menu and select the *Department ID*.
5. If you would like to apply the same template to multiple Departments, select the Add (+) button in the *Department Selection* table.
6. Select Create Objective Pages.



7. Review the message on the *Create Objective Pages – Confirmation* page. In the example below, a page owner has not been assigned.



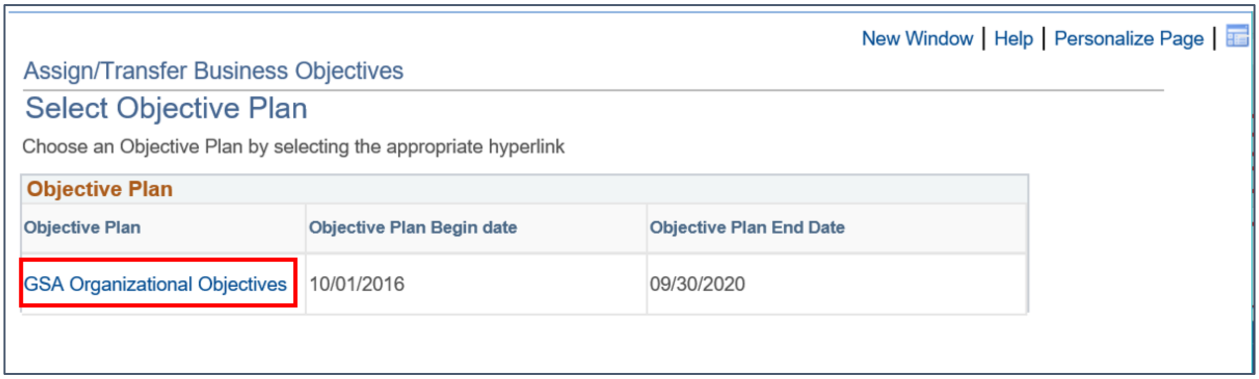
Next, assign a business objective owner.

2.1.3 Assign/Transfer Business Objectives

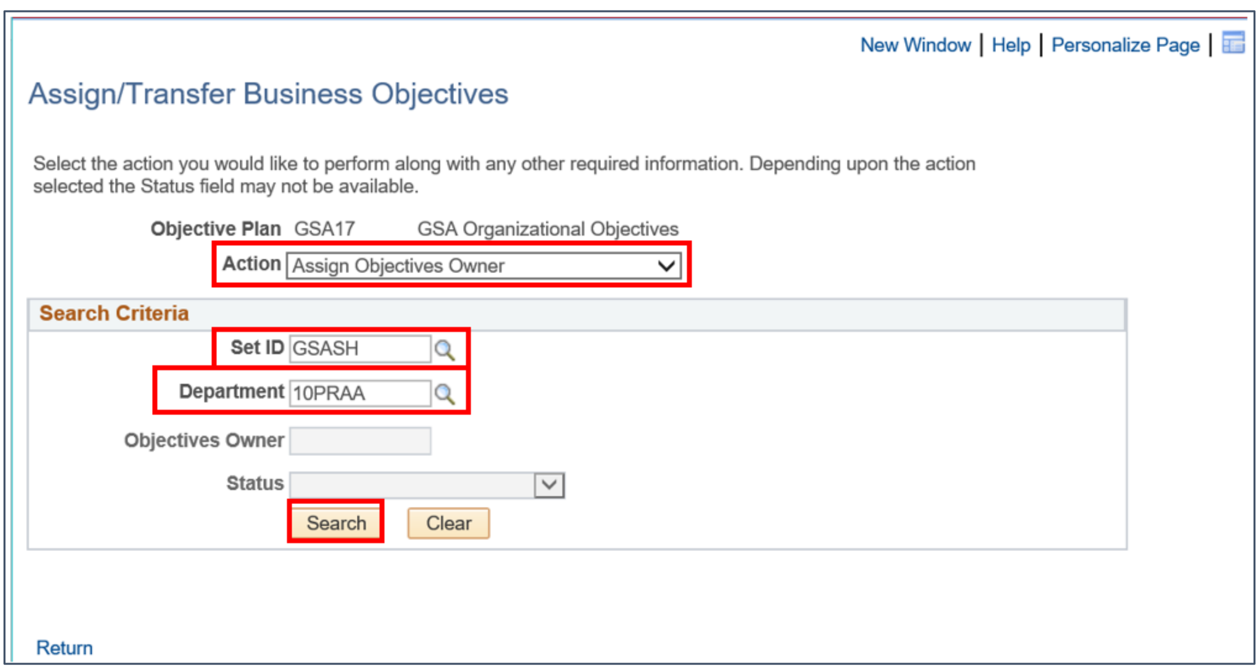
This action is only to be completed when existing business objectives are present within the system. To manage existing business objectives, perform the following steps:

Navigation: Main Menu > Workforce Development > Performance Management > Business Objectives > Administer Business Objectives > Assign/Transfer Objectives

1. Select GSA Organizational Objectives.



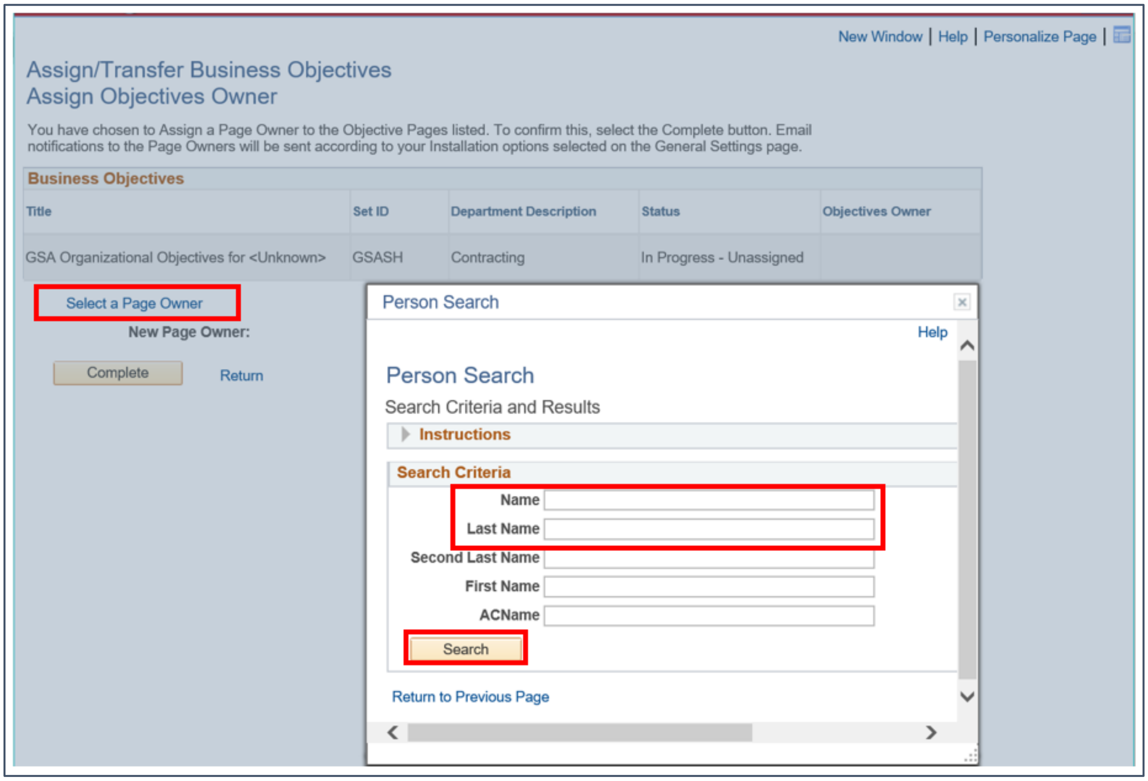
2. Select Assign Objectives Owner from the *Action* drop-down menu.
3. Select GSASH from the *Set ID* menu.
4. Select the appropriate *Department*.
5. Select Search.



6. Select the checkbox next to the applicable *Departments* and select Continue.
7. On the *Assign Objectives Owner* page, select Select a Page Owner.
8. Search for the desired business objectives owner using the *First Name* and *Last Name* fields.

9 Select Search.

10 Select the radio button next to the correct employee and select OK.



11 Select Complete.

One the objective owner is assigned, either the ePerformance Administrator or the Objective Owner can update the objectives using the *Manage Objectives* component, discussed below.

2.1.4 Manage Business Objectives

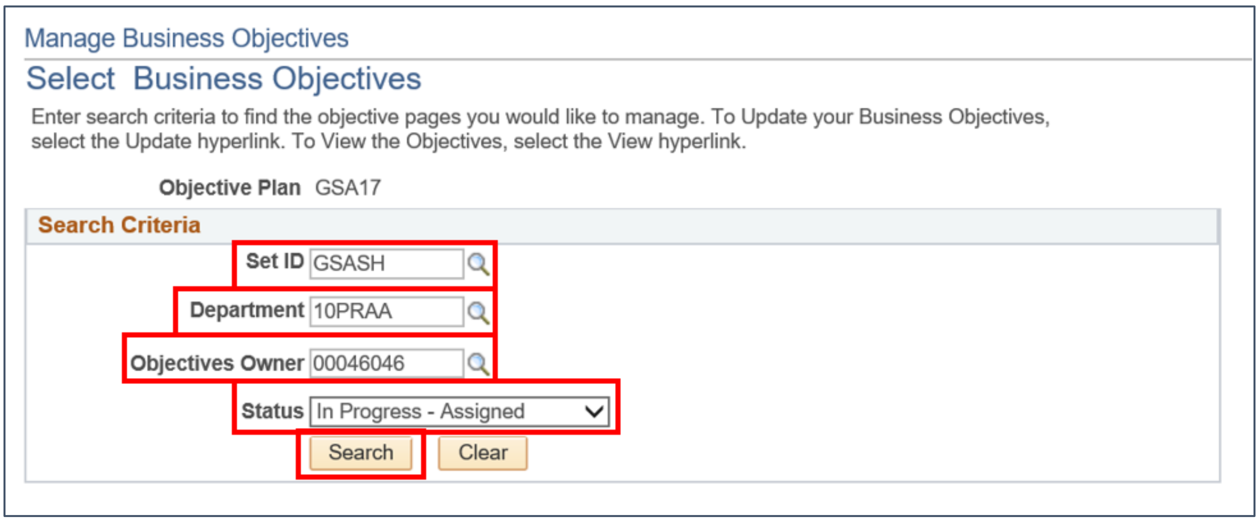
This action is only to be completed when existing business objectives are present within the system. To manage existing business objectives, perform the following steps:

Navigation: Main Menu > Workforce Development > Performance Management > Business Objectives > Manage Business Objectives.

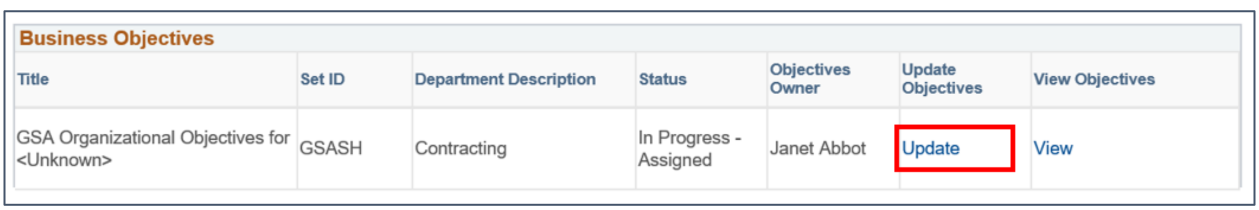
1 Select GSA Organizational Objectives from the *Objective Plan* table.

2 Search for the business objectives by entering the following data: Set ID, Department, Objectives Owner, Status.

3 Select Search.



4 Select Update.

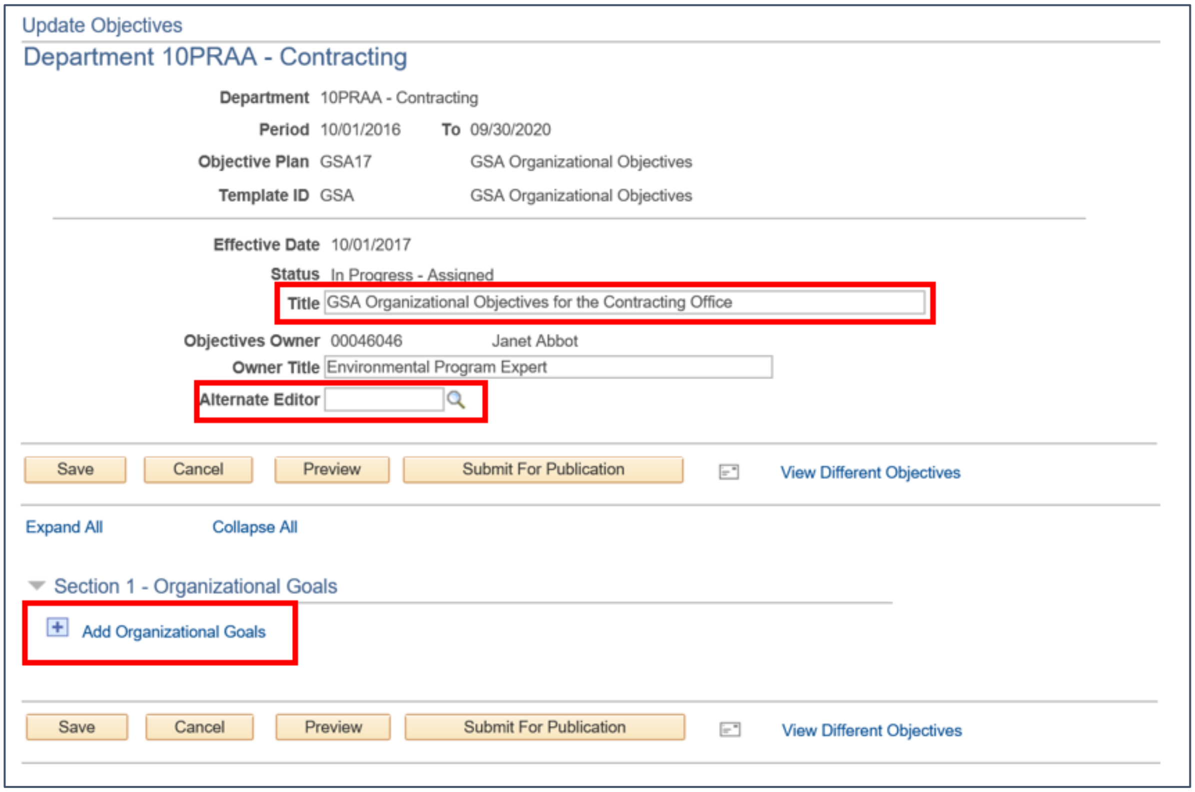


Business Objectives

Title	Set ID	Department Description	Status	Objectives Owner	Update Objectives	View Objectives
GSA Organizational Objectives for <Unknown>	GSASH	Contracting	In Progress - Assigned	Janet Abbot	Update	View

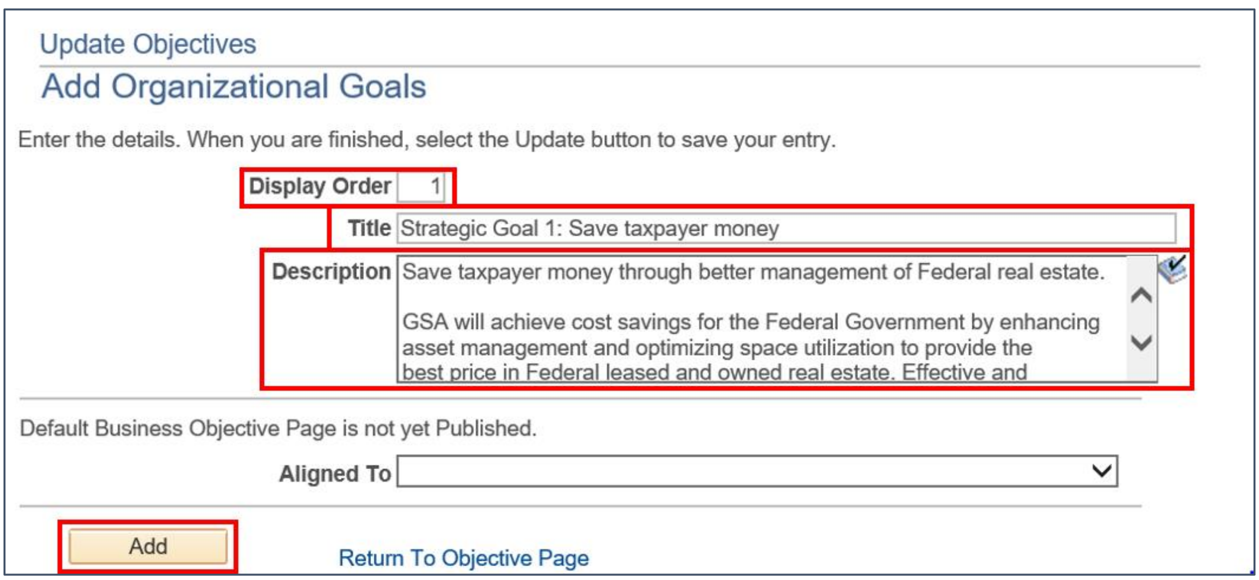
5 Modify the objective's *Title,* if applicable. Add an *Alternate Editor*, if desired.

6 Select Add Organizational Goals to begin adding organizational objectives.



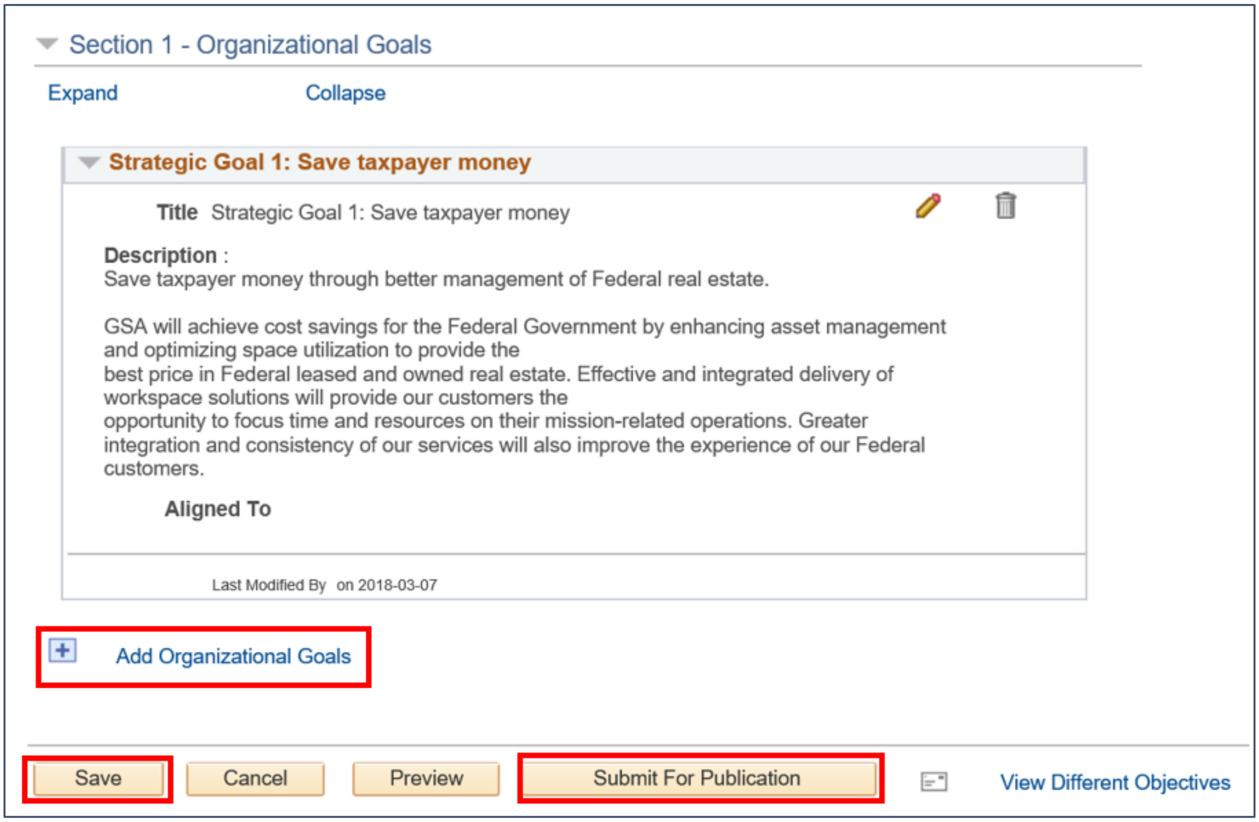
7 Enter the order you want the goal to display, the *Title* and the *Description*.

8 Select Add.



9 Continuing adding Organizational Goals following the same process until all goals have been added.

10 Select Save to return to the Objectives at a later time or select Submit for Publication to begin the process of publishing the objectives.



11 Select OK to confirm submission.

Note: Only an ePerformance Administrator can publish business objectives.