



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.

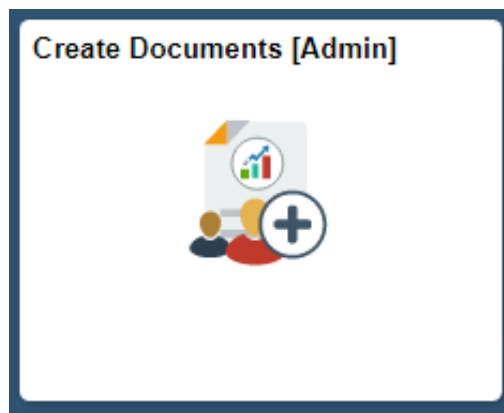
Section 1: HR Support Tasks

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

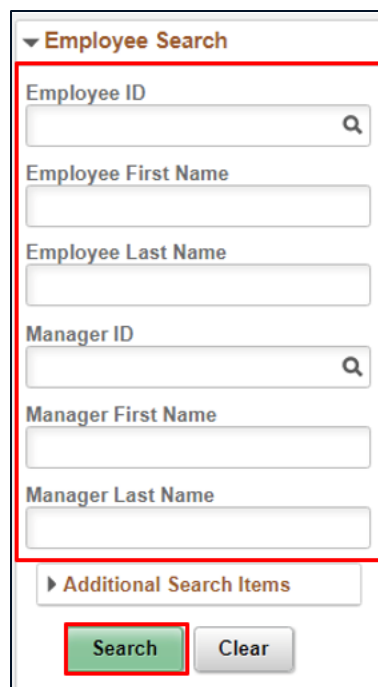
Topic 1.1: Create New Documents

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.

A screenshot of the "Employee Search" form. The form has a title "Employee Search" with a downward arrow. Below the title are several input fields: "Employee ID" (with a search icon), "Employee First Name", "Employee Last Name", "Manager ID" (with a search icon), "Manager First Name", and "Manager Last Name". Below these fields is a section titled "Additional Search Items" with a right-pointing arrow. At the bottom of the form are two buttons: "Search" (highlighted with a red border) and "Clear".

4 Select the employee from the search results.

5 Select Create Documents.

Talent Administrator **Administer Create Documents**

Employee Search Create Documents

Enter Search Criteria. Choose employees from the list and then Click Create Documents to continue.

1 row

Details **Last Document**

Name / Job Title	Supervisor	Department	Position / Occ Series	Bargaining Unit	Pay Plan / Grade
Jason Smith Interdisciplinary 101190	Jeffrey Maciejewski	WPIC Lease Projects Division	90008272 0801	1213	GS 14

Additional Search Items

Search **Clear**

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.

Back **Create Documents** **Create**

Period Begin Date 10/01/2018

Period End Date 09/30/2019

Document Type Performance Document

Clone from Prior Document ☐ No

Template GSA Annual Performance Plan

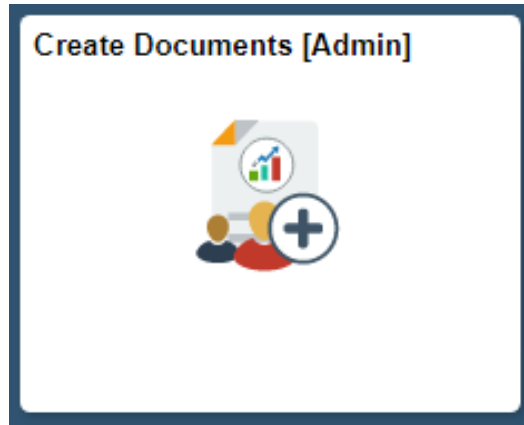
Selected Employees

Name	Job Title
Jason Smith	Interdisciplinary

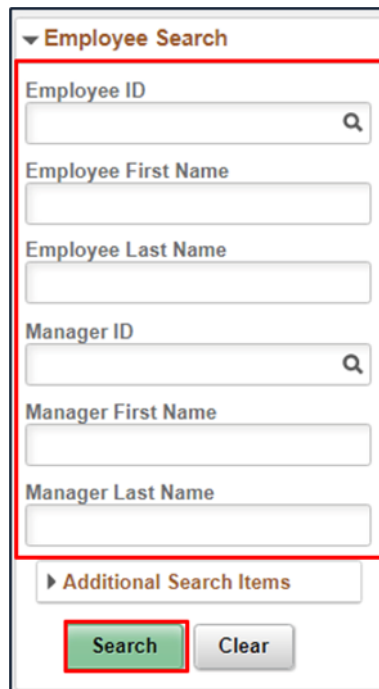
The document will appear in the employee's *Current Documents*.

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.

A web form titled "Employee Search" with a dropdown arrow. The form contains several input fields: "Employee ID" (with a search icon), "Employee First Name", "Employee Last Name", "Manager ID" (with a search icon), "Manager First Name", and "Manager Last Name". Below these fields is a section labeled "Additional Search Items" with a right-pointing arrow. At the bottom of the form are two buttons: a green "Search" button and a grey "Clear" button. A red rectangular box highlights the entire search form area, and another red box highlights the "Search" button.

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

Employee Search

Employee ID

00008322

Employee First Name

Employee Last Name

Manager ID

Manager First Name

Manager Last Name

Additional Search Items

Search

Clear

Employee Search

Create Documents

Enter Search Criteria. Choose employees from the list and then Click Create Documents to continue.

Details

Last Document

Name / Job Title	Supervisor	Department	Position / Occ Series	Bargaining Unit	Pay Plan / Grade
<input checked="" type="checkbox"/> Jason Smith Interdisciplinary 101190	Jeffrey Maciejewski	WPIC Lease Projects Division	90008272 0801	1213	GS 14

- 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.

Back

Create Documents

Create

Period Begin Date

10/01/2018

Period End Date

09/30/2019

Document Type

Performance Document

Clone from Prior Document

Yes

Prior Document

Amy Jensen

10/01/2016 09/30/2017 Mass Rating

Preview

Selected Employees

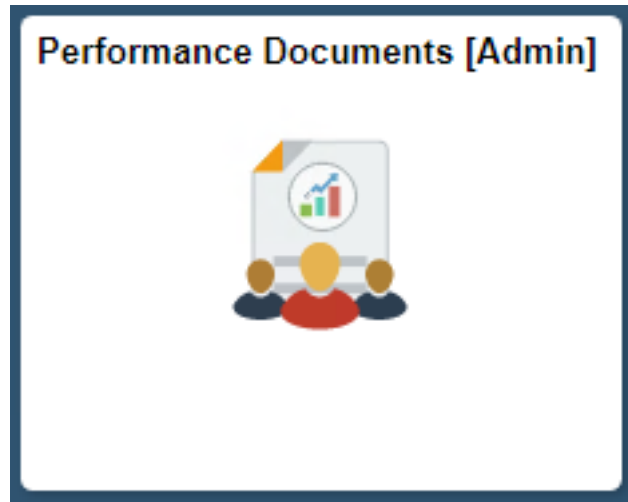
Name	Job Title
Jason Smith	Interdisciplinary

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

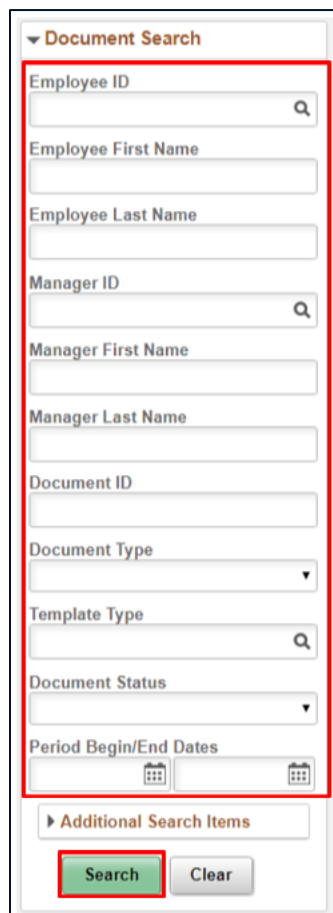
Topic 1.2: Change Document Reviewers

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.

A web form titled "Document Search" with a dropdown arrow. The form contains several input fields: "Employee ID" (with a search icon), "Employee First Name", "Employee Last Name", "Manager ID" (with a search icon), "Manager First Name", "Manager Last Name", "Document ID", "Document Type" (dropdown), "Template Type" (with a search icon), "Document Status" (dropdown), and "Period Begin/End Dates" (with calendar icons). Below these fields is a section labeled "Additional Search Items" with a right-pointing arrow. At the bottom are two buttons: "Search" (highlighted with a red box) and "Clear".

- 4 Select the employee's performance document.

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

Performance Documents					
To manage a performance document, enter the search criteria and select the document from the resulting list.					
50 rows					
<div> <div>Document Details</div> <div>Organization Details</div> </div>					
Name / Job Title	Manager Name	Document Type	Document Status	Period Begin / Period End	Next Due Date
Andrew Low IT Specialist	Jeffrey Smith	Document ID 37218 Performance Document GSA	Approval - Approved 	10/01/2018 09/30/2019	11/14/2019 >
Beth MacRae Organizational Development Spe	Daniel Schilly	Document ID 36220 Performance Document GSA	Approval - Approved 	10/01/2018 03/16/2019	11/14/2019 >
Brad Demers Procurement Analyst	Alexandra Rouse	Document ID 38363 Performance Document GSA	Approval - Submitted 	10/01/2018 09/30/2019	11/14/2019 >

5 Select the Manager ID tab.

Performance Document

Performance Document

GSA

Open

Employee 00007613 Brad Demers

Details >

Document ID 38363

Manager ID 00006666 Alexandra Rouse

>

Period 10/01/2018 to 09/30/2019

>

Document Status Approval

>

Approval Status Submitted

>

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

Q

Thomas Morgan

Comment

Training Comment

I

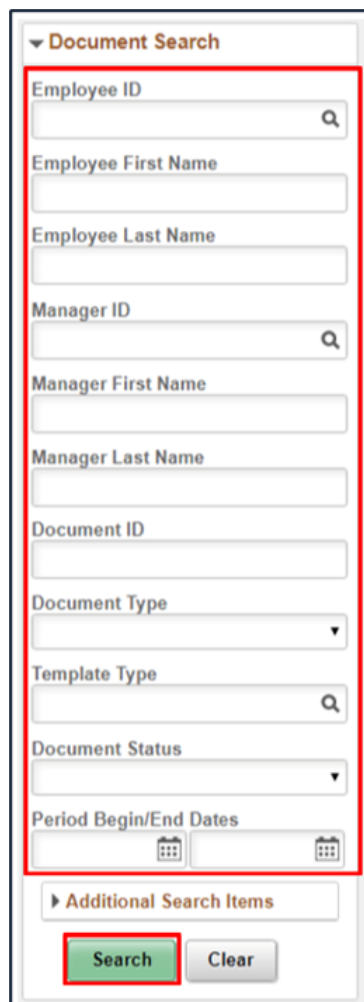
1.2.2 Change Document Approver

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.

A vertical form titled "Document Search" with a dropdown arrow. The form contains several input fields: "Employee ID" (with a search icon), "Employee First Name", "Employee Last Name", "Manager ID" (with a search icon), "Manager First Name", "Manager Last Name", "Document ID", "Document Type" (dropdown), "Template Type" (with a search icon), "Document Status" (dropdown), and "Period Begin/End Dates" (with calendar icons). A red rectangle highlights the entire search section. Below the search fields is a section titled "Additional Search Items" with a right-pointing arrow. At the bottom are two buttons: "Search" (highlighted with a red rectangle) and "Clear".

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

Marjusz Lewandowski INTERSYSTEM MOVEMENT	Liliana Delbonifro	Document ID 23373 Performance Document GSA	Approval - Approved 	10/01/2017 03/31/2018	11/14/2018	>
Mohammed Berlas Chief Information Security Off	Vanessa Ros	Document ID 57914 Performance Document GSA	Approval - Submitted 	10/01/2018 09/30/2019	11/14/2019	>
Ralph Hunter Contract Specialist	Kevin Mitchell	Document ID 41895 Performance Document GSA	Approval - Submitted 	10/01/2018 03/30/2019	11/14/2019	>
Robert Sodano Contract Specialist	Rodger Hoover	Document ID 38517 Performance Document GSA	Approval - Approved 	10/01/2018 09/30/2019	11/14/2019	>

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

- 5 Select the Approval Status tab.

Performance Document

Performance Document

GSA

Open

Employee 00006198 Mohammed Berlas

Details >

Document ID 57914

Level 5 Outstanding

Manager ID 00018405 Vanessa Ros >

Period 10/01/2018 to 09/30/2019 >

Document Status Approval >

Approval Status Submitted >

Step	Due Date	Signatures
<div>Establish Performance Plan</div> <div>Issue Date: 02/27/2019</div>	11/14/2018	<div>Mgr: Vanessa Ros 02/27/2019 11:45:58</div> <div>EE: Mohammed Berlas 02/27/2019 12:07:35 [ACKN]</div>
<div>Complete Mid-Year Progress Review</div> <div>Skipped</div>	05/31/2019	
<div>Nominate Participants</div>	11/14/2019	
<div>Review Employee Self-Assessment</div>	11/14/2019	
<div>Review Manager Evaluation</div> <div>Pending Approval</div>	11/14/2019	

Admin Actions Audit

- 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.

Cancel
Approval Status
Save

▼ Review Employee
Pending

Pending

David A Shive
SSC Position Management

Select an **Approver** and then select a new **Reassign To** and click **Save** to reassign the reviewer of this document.

Approver
Reassign To
Comment

▶ Administrative Overrides

- 8 Enter search criteria to find the new approver.
- 9 Select the new approver from the search results.

Cancel
Lookup

Search for: Reassign To
Show Operators

▼ Search Criteria

User ID (begins with)
Description (begins with)
Search
Clear

▼ Search Results

Only the first 300 results can be displayed.
300 rows

User ID	Description
00013335	
00023316	Ryan Michael Reynolds
00023367	Amanda P Hueston
00023400	Timothy Andrew Castillo
00023454	Heather Michelle Bushouse
00023518	Kiara S White

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.

Cancel

Approval Status

Save

▼ Review Employee

Pending

⌚ Pending

David A Shive
SSC Position Management

>

Select an **Approver** and then select a new **Reassign To** and click **Save** to reassign the reviewer of this document.

Approver

David A Shive ▼

Reassign To

00023518 🔍

Kiara S White

Comment

Training Comment

▶ Administrative Overrides

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.

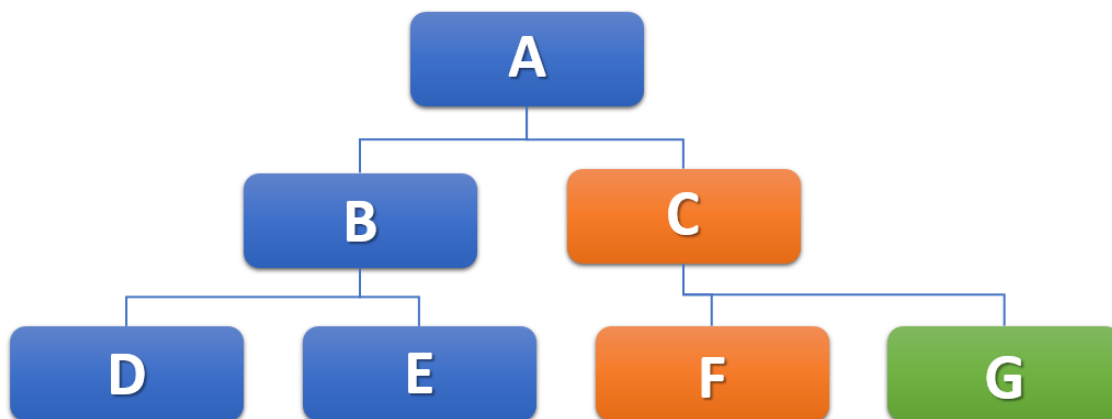


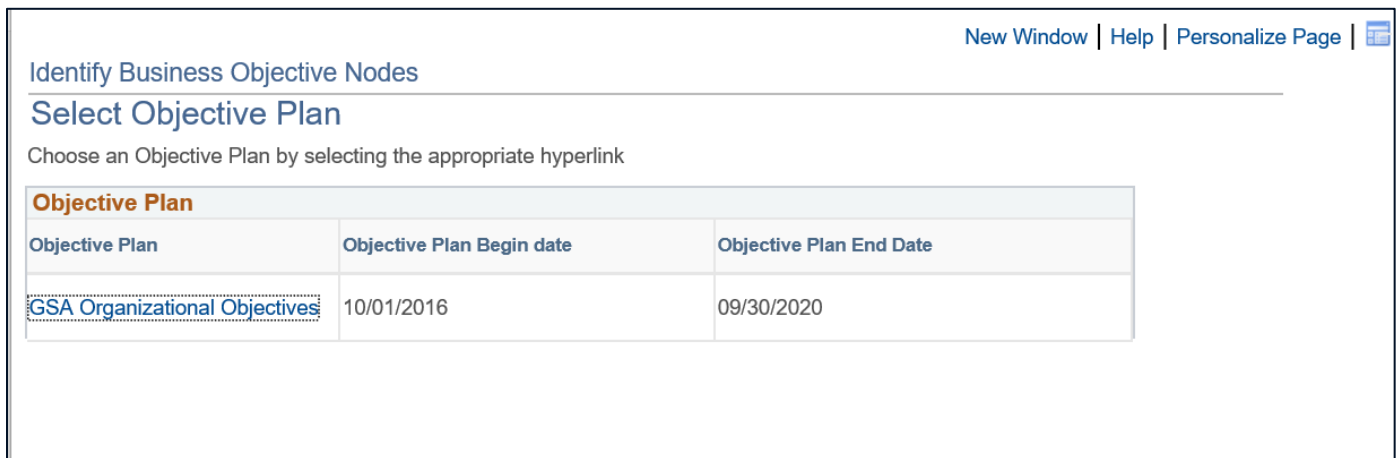
Figure 1: Cascading Organizational Objectives


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.



[New Window](#) | [Help](#) | [Personalize Page](#) | 

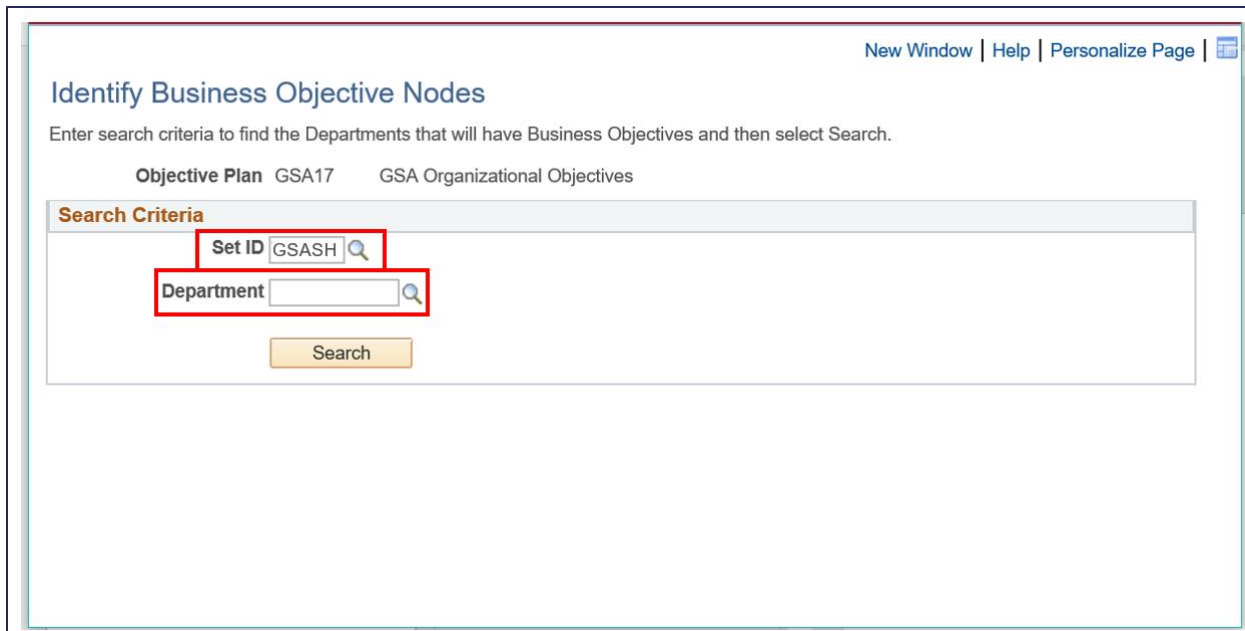
Identify Business Objective Nodes


Select Objective Plan

Choose an Objective Plan by selecting the appropriate hyperlink

Objective Plan		
Objective Plan	Objective Plan Begin date	Objective Plan End Date
GSA Organizational Objectives	10/01/2016	09/30/2020

- 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.




[New Window](#) | [Help](#) | [Personalize Page](#) | 


Identify Business Objective Nodes

Enter search criteria to find the Departments that will have Business Objectives and then select Search.

Objective Plan GSA17 GSA Organizational Objectives

Search Criteria

Set ID GSASH 

Department 

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

Create Business Objectives
Select Objective Plan
Choose an Objective Plan by selecting the appropriate hyperlink

Objective Plan	Objective Plan Begin date	Objective Plan End Date
GSA Organizational Objectives	10/01/2016	09/30/2020

- 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.

Create Business Objectives
Complete the information in the *Home Page Creation Details* section.
Once the creation details have been chosen, select the **Create Page** pushbutton to generate the objective page(s).

Home Page Creation Details

Objective Plan GSA Organizational Objectives

Effective Date 10/01/2017

Template GSA Organizational Objectives

Publication Due Date 10/01/2017


☐ Set Owner to Department Manager

Department Selection Personalize | Find | First 1 of 1 Last

Set ID	Department ID	Department Name
GSASH	10PRAA	Contracting

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.

New Window | Help | Personalize Page | 

Create Objective Pages - Confirmation

Home Page Creation Details





Objective Plan GSA Organizational Objectives

Effective Date 10/01/2017

Template GSA Organizational Objectives

Pages Created

The following Objective Pages have been successfully created.

Selected Departments				Personalize Find  	First  1 of 1  Last
Set ID	Department	Description	Page Owner	Message	
GSASH	10PRAA	Contracting		Page Created Successfully. Page Owner Unassigned.	

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.

The screenshot shows the 'Assign/Transfer Business Objectives' page. At the top right are links for 'New Window', 'Help', and 'Personalize Page'. Below the page title is a section titled 'Select Objective Plan' with the instruction 'Choose an Objective Plan by selecting the appropriate hyperlink'. A table with three columns is displayed: 'Objective Plan', 'Objective Plan Begin date', and 'Objective Plan End Date'. The first row contains the text 'GSA Organizational Objectives', '10/01/2016', and '09/30/2020'. The 'GSA Organizational Objectives' text is highlighted with a red rectangular box.

Objective Plan	Objective Plan Begin date	Objective Plan End Date
GSA Organizational Objectives	10/01/2016	09/30/2020

- 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.

The screenshot shows the 'Assign/Transfer Business Objectives' page. Below the title is the instruction 'Select the action you would like to perform along with any other required information. Depending upon the action selected the Status field may not be available.' The 'Objective Plan' is set to 'GSA17' and 'GSA Organizational Objectives'. The 'Action' dropdown menu is open, showing 'Assign Objectives Owner' as the selected option, and this entire dropdown area is highlighted with a red box. Below this is the 'Search Criteria' section. It contains a 'Set ID' field with 'GSASH' entered, a 'Department' field with '10PRAA' entered, and an 'Objectives Owner' text field. The 'Set ID' and 'Department' fields are each highlighted with a red box. Below these fields is a 'Status' dropdown menu. At the bottom of the search criteria section are 'Search' and 'Clear' buttons, both highlighted with red boxes. A 'Return' link is located at the bottom left of the page.

- 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.

The screenshot shows the 'Assign/Transfer Business Objectives' page. At the top, there are links for 'New Window', 'Help', and 'Personalize Page'. Below the title, a message states: 'You have chosen to Assign a Page Owner to the Objective Pages listed. To confirm this, select the Complete button. Email notifications to the Page Owners will be sent according to your Installation options selected on the General Settings page.'

The 'Business Objectives' table is visible, with columns: Title, Set ID, Department Description, Status, and Objectives Owner. The first row is: 'GSA Organizational Objectives for <Unknown>', 'GSASH', 'Contracting', 'In Progress - Unassigned', and an empty 'Objectives Owner' cell.

A 'Select a Page Owner' button is highlighted with a red box. Below it, the 'New Page Owner:' section shows a 'Complete' button and a 'Return' button.

A 'Person Search' modal is open. It has a 'Search Criteria' section with fields for 'Name', 'Last Name', 'Second Last Name', 'First Name', and 'ACName'. The 'Name' and 'Last Name' fields are highlighted with a red box. A 'Search' button is also highlighted with a red box. At the bottom of the modal is a 'Return to Previous Page' link.

11 Select Complete.

The screenshot shows the 'Assign/Transfer Business Objectives' page after the page owner has been assigned. The 'Business Objectives' table is the same as in the previous screenshot.

Below the table, the 'Select a Page Owner' link is now a blue text link. The 'New Page Owner:' section now displays 'Janet Abbot'. The 'Complete' button is highlighted with a red box, and the 'Return' button is also visible.

Once 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.

Manage Business Objectives

Select Business Objectives

Enter search criteria to find the objective pages you would like to manage. To Update your Business Objectives, select the Update hyperlink. To View the Objectives, select the View hyperlink.

Objective Plan GSA17

Search Criteria

Set ID	GSASH	
Department	10PRAA	
Objectives Owner	00046046	
Status	In Progress - Assigned	
Search		Clear

- 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.

Update Objectives

Department 10PRAA - Contracting

Department 10PRAA - Contracting
 Period 10/01/2016 To 09/30/2020
 Objective Plan GSA17 GSA Organizational Objectives
 Template ID GSA GSA Organizational Objectives

Effective Date 10/01/2017
 Status In Progress - Assigned
 Title GSA Organizational Objectives for the Contracting Office
 Objectives Owner 00046046 Janet Abbot
 Owner Title Environmental Program Expert
 Alternate Editor

Save Cancel Preview Submit For Publication [View Different Objectives](#)

Expand All Collapse All

▼ Section 1 - Organizational Goals

[+ Add Organizational Goals](#)

Save Cancel Preview Submit For Publication [View Different Objectives](#)

- 7 Enter the order you want the goal to display, the *Title* and the *Description*.
- 8 Select Add.

Update Objectives

Add Organizational Goals

Enter the details. When you are finished, select the Update button to save your entry.

Display Order

Title Strategic Goal 1: Save taxpayer money

Description Save taxpayer money through better management of Federal real estate.
 GSA will achieve cost savings for the Federal Government by enhancing asset management and optimizing space utilization to provide the best price in Federal leased and owned real estate. Effective and

Default Business Objective Page is not yet Published.

Aligned To

[Add](#) [Return To Objective Page](#)

- 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.

▼ Section 1 - Organizational Goals

Expand

Collapse

▼ Strategic Goal 1: Save taxpayer money

Title Strategic Goal 1: Save taxpayer money

Description :
Save taxpayer money through better management of Federal real estate.

GSA will achieve cost savings for the Federal Government by enhancing asset management and optimizing space utilization to provide the best price in Federal leased and owned real estate. Effective and integrated delivery of workspace solutions will provide our customers the opportunity to focus time and resources on their mission-related operations. Greater integration and consistency of our services will also improve the experience of our Federal customers.

Aligned To

Last Modified By on 2018-03-07

+

Add Organizational Goals

Save

Cancel

Preview

Submit For Publication

View Different Objectives

11 Select OK to confirm submission.

Note: Only an ePerformance Administrator can publish business objectives.

Performance Management for ePerformance Support

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