



Performance Management



Camptra Technologies 1309 W 15th Street Suite 240 Plano, TX 75075



info@camptratech.com

V1 Camptra Technologies 1/1/2024

Guide Usage and Disclosures
Guide Information2
How To Use This Guide
Overall Process Flow
Glossary of Terms
Day to Day Operations Guide6
Create Performance Documents
Search For Organization Performance Documents11
Send Email Notification13
Transfer Performance Documents
Change Due Date
Cancel Performance Documents
Delete Performance Documents
Delete Participant Feedback
Complete Performance Documents
Reopen Performance Documents
Move Task Forward
Move Task Back
Process Mass Actions for Performance Documents

Guide Usage and Disclosures

Guide Information

This guide is designed based on the Oracle Cloud HCM delivered setups; some fields may differ from your instance configurations. For example, some fields may be required in this guide that are not required in your instance. Additionally, some of the training topics discussed in this guide may not apply to your organization, but we know you'll find it helpful. If you would like a custom guide for your organization, please contact our Training Team at learn@camptratech.com.

How To Use This Guide

This guide is intended to assist Admin users with their day-to-day tasks in Oracle Cloud. A few notes before you begin:

- Any fields with an asterisk are required fields.
- Based on your configurations, approval workflows may in place for the training topics below; those tasks would need to be approved before the additions or updates are visible in your instance.
- You may have specific flexfields in your instance that require inputs; this guide is a generic tool and will not include those specific flexfields. You will see those fields as a context segment or not visible at all in our Oracle instance.

Overall Process Flow

Before we begin with the training content, It's important to understand the overall process flow of information in Oracle Cloud for the Performance Management module.



3

Glossary of Terms

Here we've included common terms associated to the Performance Management module. Please review the terms below to familiarize yourself with the Oracle Cloud terms used throughout this guide.

Performance Document

A document that contains information and allows a supervisor to perform an employee-related evaluation for a chosen time period

Notification

A notice sent to an employee of an organization containing information for action or as an FYI

Goal Plans

A visual representation of the steps needed to accomplish an identified goal; a plan to accomplish a goal

Participant Feedback

Comments regarding an employee's effort and performance from a manager or colleague

Document Eligibility

An employee will only be eligible for a performance document if they meet the eligibility criteria for the performance document or the eligibility profile.

Review Periods

A period of time in which an employee's performance is evaluated, usually over the course of 1 year, using a formal review process by their manager and/or colleagues

Questionnaires

Survey questions designed to enable managers and supervisors to give actionable feedback on specific aspects of employees' work, including areas for improvement, additional training needs, areas of exceptional performance, and expectations of future performance

Performance Document Types

Document types are used to determine which performance document provide interim rating later in performance documents or which goal plans that performance goals added to performance documents are added to

4

Performance Roles

We can create roles as required for the evaluation process for the organization. Most organizations have participant roles such as peer or mentor, or participant roles to facilitate a matrix management review. We can also have additional manager roles used in performance templates where the default manager type is not the line manager, for example, the default manager can be an HR Manager

Eligibility Profiles

Used to restrict availability of performance documents to a specific population based on criteria set forth by the organization

Check-In

A series of regular conversations between managers and employees about work, progress, and goals throughout the year

Profile Rating Models

Rating models are used to rate workers on their performance and level of proficiency in the skills and qualities that are set up on the person profile

Talent Notifications

 We can configure the application to send notifications to different roles such as the HR specialist, manager, and employee for various performance management tasks

Performance Templates

We can configure the performance template to use interim evaluations; these include interim ratings and comments in the later performance document. The ratings, comments, or both (depending on configuration) from performance documents associated with those document types appear in the document

Day to Day Operations Guide

Create Performance Documents

Navigation: Home>My Client Groups>Performance>Performance Document>Create Document>Search Employee>Continue>Enter Document Info>Submit>Eligibility Batch Process>Enter Basic Options>Submit>Monitor Process

From the home screen, click My Client Groups

= vision	Q Search for people and actions						Ş.
	Good morning, H	R Specialist	(Curtis Fe	itty)!			0
	Me My Team My Client Gr	y Team My Client Groups Tools Configuration My Reporting					0
	QUICK ACTIONS	APPS Click	My Client Groups				0 0r
		്ന്	<u>%</u>	₽v/		Ê	0
				Person Management		Time Management	00
	☆ Change Assignment						° (
	ම් Change Manager	1 0%	£© €	ál	₩		0
00000	My Termination	Compensation	Goals	Hertormance	Wondorce Structures	Раутон	
0	En Checklist Terrolates	议	5				
	مرزي المرزي Act as Proxy Manager	Data Exchange	Safety Incidents	Ť			
THE REAL PROPERTY.	Shaw Mare						
	Things to Finish						

Next, click **Performance**

= vision	Q Sea	rch for people and actions					٢) 장 너 🍗 🐧
	Good morning, F	IR Specialist	(Curtis Fe	itty)! Reporting				
	아마다 Change Working Hours 양 Change Working Hours 양 Change Assignment	ස්ත් ස්ත් Hiring	New Person	Person Management		Time Management		
	ট্রি Change Manager উঠুগ Termination উঠুগ Transfer	Compensation	Scoals	Performance	Workforce Structures	Payroll		
	Checklist Templates Act as Praxy Manager	Data Exchange	Safety Incidents	+	Click Pe	erformance		
	Show Mare							

Click Performance Document

VISION Performance		の ひ な 日 🥠
	What do you want to do or manage?	
	Search for tasks Q	
	Administration	
	Performance Documents	
	Participant Feedback Click Performance Documents	
	Performance Document Eligibility	
	Process Mass Actions for Performance Documents	
	Setup Maintenance	
	Review Periods	
	Questions	
	Ruestionnaire Templates	

Click Create Document

= vision	익 🗅 ☆ 🏳 👶 🔋
< Performance Documents	Create Document Send Email Notification
Search Performance Documents	
Find person from results Q Hide Filters Review Period 2023 Annual Cycle Assignment Status Active X Document Status In progress	
Saved Search 🗌 🛛 Actions 🗸 Sort By Last Name - A to Z 🔹 🗸	
Save	
Filters Reset & Select an employee, manager or department to start a search. Select a performance document to change due dates or move the current task forward or back.	
Review Period	전문을 전문문을
Performance Document	
> Empoyée	신화적화관국
∧ Manager	
∧ Department	
v	
 Assignment Status 	

Enter the Filter Information

ISION ate Performance I)ocuments	
	Search Eligible Employees	
	Find person from results Q Hide Filters Review Period McA Annual Evaluation 2022-23 Assignment Status Active X >>	
	Saved Search Sort By Last Name - A to Z 🗸	
	✓ Save ☐ TS Test Sarah 1000009	
	Filtrars Peret & Assignment Status Manager	
	Active - Payroll Eligible Test Rachel	
	Expand Rill Conspire Rill	
	 Review Period * 	
	McA Annual Evaluation 2022 V	
	Pentormance Locument Clear	
	McA Annual Performance FY V	
	Enter Filter Information	
	Test Sarah	
	Manager	
	> Department	
	v	

Select the employee by clicking the **Check box** and click **Continue**

= VISION		오 습 ☆ ㄹ 🕫 🚦
Create Performance Documents		Continue
Search Eligible Employees		Click Continue
Find person from results Q	Hide Filters Review Perind McA Annual Evaluation 2022-23 Assignment Status Active X	»
Saved Search	Select Check Box	Sort By Last Name - A to Z
✓ Save	Test Sarah 1000009	
Filters Reset 🕸	Assignment Status Manager Active - Payroll Eligible Test Rachel	
∧ Review Period * McA Annual Evaluation 2022 ∨		
∽ Manager		
Department		
✓ Assignment Status		

Enter the **Document Details** and the **Reason** and click **Submit**

Document Details Enter-the below information Review Ferdod McA Annual Ferdomance Document Name McA annual Ferdomance Pr2023 Text Rushelt "from Date UV/7.3 Manager "to Date Text Rushelt "2/3/1/2.3 Reason "tax commer request	Selected Employees - 1				×
Review Reidd *from Date McA. Armula Yanitanion 2022-23 [V/223] McA. Armula Performance Pr2023 *To Date Manager 102/31/23] Test Ranhel ************************************	Document Details	Enter the below in	formation		
Reason	Review Period NcK-Armas Hauston 2022-23 Performance Document Name McA.Armat Performance P/2023 Manger Test Rachel	*fro 1777 *16 127	m Date 23 Date 31/23	6) 6)	
Task owner request	Reason				
	Task owner request	~]			

Navigate back to the **Performance** home page and click **Eligibility Batch Process**

erformance		
	Performance Roles	
	Eligibility Profiles	
	Performance Document Types	
	Performance Template Sections	
	Performance Process Flows	
	Reformance Templates	
	Check-In Templates	
	Reedback Templates	
	Eligibility Batch Process	
	Click Eligibility Batch Process	
	Profile Rating Models	

Select Batch Process Type

= vision		이 슈 뇬 🕫 🏮
C Fligibility Batch Process @		Manitar Bracare
C Eligibility Datch Troccss ©		Womton Process
This process will be queued up for submission at position 1		
	Process O	ations Advanced Submit Cancel
Name Manage Eligibility Batch Process		
Description Determines the eligibility of workers for perfo	Notify me when this process ends	
Schedule As soon as possible	Submission Notes	
Basic Options Parameters		
Batch Process Type	Assgn Performance Document Assgn Check-In Emglase	
	Select Batch Process Type	
		P

Enter the **Basic Options** and click **Submit**

= vision				익 습 ☆ Þ 👶 🔋
✓ Eligibility Batch Process ⊘				Monitor Process
This process will be queued up for submission at position 1				Process Options Advanced Submit Cancel
Name Manage Eligibility Batch Process				lick Submit
Description Determines the eligibility of workers for perfo			Notify me when this process ends	
Schedule As soon as possible		Submission Notes		
Basic Options Enter	r the below information			
Batch Process Type	Assign Performance Docur \vee			
"Effective as of Date	Current Date 3/1/23			
*Review Period	McA Annual Evaluation 2022-23	~		
*Performance Document Name	McA Annual Performance FY2023	~		
*Create Eligible Performance Document	○ No ● Yes			
Maximum Number of Concurrent Threads for Performance Document Creation	8			
*Purge Historic Performance Management Eligibility Status Data	○ No ● Yes			
Purge Data Older Than	9/2/22			

Lastly, click Monitor Process to view the status of the process

= VÎSÎON		익 습 숲 戶 🖓 🔋
✓ Eligibility Batch Process [®]		Monitor Process
This process will be queued up for submission at position 1		Click Monitor Process
		Process Options Advanced Submit Cancel
Name Manage Eligibility Batch Process		
Description Determines the eligibility of workers for perfo	Notify me when this process ends	
Schedule As soon as possible	Submission Notes	
Basic Options Parameters		
Batch Process Type		

Search For Organization Performance Documents

Navigation: Home>My Client Groups>Performance>Performance Document> Search and Select Document>Search Document Using Filters

= vision	Q. Search for people and actions						습 ☆ ᄆ 🕫 🔋
	Good morning, HR Specialist (Curtis Feitty)! Me My Team My Client Groups Tools Configuration My Reporting						
	QUICK ACTIONS	APPS Click	My Client Groups				
	안 Hire an Employee 健 Change Working Hours	පී්දී Hitima	O * Marie Bourcon		8		
	💱 Change Assignment			Management		Management	
0000	👸 Change Manager	19 <u>%</u>	Ŷ©	<u>a</u>	81		
					Workforce Structures		
0 0 0	∲y Transfer		er				Carl
	Checklist Templates	Data Exchange	Safety Incidents	+			
T. B. G. S. D.							
	Things to Finish						

From the home screen, click My Client Groups

Next, click Performance

= vision	Q se	arch for people and actions					습 추 년 🍓 🔋
0.96	Good morning, I	HR Specialist	(Curtis Fe	itty)!			
	Me My Team My Clien						
	QUICK ACTIONS APPS						
	Hire an Employee	ĥů	×	Nr∕r		Ē	
0 0 0 0 0		Hiring	New Person	Person Management		Time Management	
	🖅 Change Assignment						
0,0000	Change Manager	1 0%	Ŷ©	剞	Ba/		
	by Termination				Workforce Structures		
U 0 0	👷 Transfer				Click Pe	erformance	
	Checklist Templates			+			
	Act as Proxy Manager	Data Dunange	salety incidents				
	This as a right						

Click Performance Document

VISION		오 습 ☆ 묜 🕫
renormanc		
	What do you want to do or manage?	
	Search for tasks Q	
	Administration	
	Berformance Documents	
	Barticipant Feedback Click Performance Documents	
	Reformance Document Eligibility	
	Process Mass Actions for Performance Documents	
	Setup Maintenance	
	Review Periods	
	Receiptions	
	Questionnaire Templates	

Using the **Filters**, enter the search criteria. The **Performance Documents** associated to the search criteria will populate

vision		오 습 ☆ ᄆ 🐢
Performance Documents		Create Document Send Email Notification
		ALL VARAGEORIA AN
Search Performance Do	cuments	
Find person from results Q	Hide Filters Review Period McA Annual Evaluation 2022-23 Assignment Status Active X	
Saved Search	Actions These documents will populate Sort By Last Name - A to Z	
Save	TS McA Annual Performance FY2023 Test Sarah 1000009	
Filters Reset 🔅	Payroll Time Specialist	
Enter the Filter Informa	Assignment Status Manager Active - Payroll Eligible Test Rachel	
 Review Period * 	Document Status Current Task	
McA Annual Evaluation 2022 V	In progress Worker Self-Evaluation Ready	
A Performance Document Clear		
McA Annual Performance FY V		
~ Employee		
Test Sarah V		
~ Manager		
×		
∧ Department		
✓ Assignment Status		· 국무 전 문공 너 영국

Send Email Notification

Navigation: Home>My Client Groups>Performance>Performance Document> Search and Select Document>Send Email Notification>Enter Information>Send

= vision	Q. Search for people and actions						습 & ᄆ 🕫 🔋
	Good morning, H	R Specialist	(Curtis Fe	itty)!			
0 0 0 ⁰ 0 0 0	Me My Team My Client Gr	0 0 0 0 0					
	QUICK ACTIONS	APPS Click	My Client Groups				
	∯ [★] Hire an Employee	ස්ත්	°*	∞⁄⁄/		ii}}	
	Change Working Hours			Person Management		Time Management	9
	ାର୍ଥ୍ରି Change Manager	[9]	ନ୍ତ	刹	E.		
	⊗⁄⁄ Termination	Compensation	Goals	UUU Performance	Workforce Structures	Payroll	
0° 0 0	∲ø⁄ Transfer		പ				
	Checklist Templates	Data Exchange	Safety Incidents	+			
Sound Street B	हुहुए Act as Proxy Manager						
	Things to Finish						

From the home screen, click My Client Groups

Next, click Performance

= vision	Q se	arch for people and actions					습 추 년 🍓 🔋
0.96	Good morning, I	HR Specialist	(Curtis Fe	itty)!			
	Me My Team My Clien						
	QUICK ACTIONS APPS						
	Hire an Employee	ĥů	×	Nr∕r		Ē	
0 0 0 0 0		Hiring	New Person	Person Management		Time Management	
	🖅 Change Assignment						
0,0000	Change Manager	1 0%	Ŷ©	剞	Ba/		
	by Termination				Workforce Structures		
U 0 0	👷 Transfer				Click Pe	erformance	
	Checklist Templates			+			
	Act as Proxy Manager	Data Dunange	salety incidents				
	This are to Finish						

Click Performance Document

= VISION < Performance		익 습 ☆ ᄆ 🐢
What	t do vou want to do or manage?	
	, , , , , , , , , , , , , , , , , , , ,	
Search	for tasks Q	
Adu	ministration	
	Performance Documents	
	Participant Feedback Click Performance Documents	
그는 모두 가지 그는 것을 것 같아.		
	B Performance Document Eligibility	
	Process Mass Actions for Performance Documents	
Set	up Maintenance	
	Review Periods	
	Questions	
	Questionnaire Templates	

Click Send Email Notification

-vicion		0 0 4 5 @ 0
= VISION		ЧПХРФ 🖡 🧵
Performance Documents		Create Document Send Email Notification
		A GALENAN MA
Search Performance Doc	uments	
Find person from results	Hide Filters Review Period 2023 Annual Cycle Assignment Status Active X Document Status In progress X	
Saved Search	Actions V Sort By Last Name - A to Z V	
√ Save	Try searching to get results	
Filters Reset 🏟	Select an employee, manager or department to start a search. Select a performance document to change due dates or move the current task forward or back.	
Expand All Collapse All		
 Review Period * 		
2023 Annual Cycle 🗸		
Performance Document		
Employee		
∧ Manager		
· · · · · · · · · · · · · · · · · · ·		
∧ Department		
×		
✓ Assignment Status		

Next, we need to enter the **Select Population** Information

Select Population Enter the be		
	low/Information	
** Department	Performance Document Dates	
Accounting HC US	1/1/23 - 12/31/23	
Review Period	Hire Date Start Range	
2023 Annual Cycle	Select a value V Select a value V	
tt Berformance Decument	Hire Date End Banne	
2022 Annual 260 Development Surfustion	Salart a value v Salart a value v	
Loss Annual Sos Development Evaluation		
Email		
Email		
Email		
Email Subject		
Email Subject		
Email *Enail Subject Upcoming Performance Review		
Email *Enail Subject Upcoming Performance Review		
Email *Enail Subject Upcoming Performance Review *Enail Text		
Email Fenal Subject Upcoming Performance Review Fenal Text		
Email *Email Subject Upcoming Performance Review *Email Note Text • 2 • B I U ⊟ ⊟ @ ♡ • ○ ◆ ◆		
Email *Email Subject Upcoming Performance Review *Email Text Feet → 2 → B J 및 Ε Ξ ֎ 및 5 ♥ ♥		
Email *Enail Subject Upcoming Performance Review *Enail Text Fermi * 2 * B X U E E &		
Email *Email Subject Upcoming Performance Review *Email Text Feet 2 B I U E E	numly to evaluate your own performance and discuss your career development with your manager.	
*Email *Email Subject Upcoming Performance Review *Email Text Feat *2 * B X L E E &	rtunity to evaluate your own performance and discuss your career development with your manager.	
Email *Email Subject Upcoming Performance Review *Email Test Feet 2 B I U E E	tunny to evaluate your own performance and discuss your career development with your manager.	
Email *Email Subject Upcoming Performance Review *Email Text Feet 2 B I U E E ® ♡ 2 2 2 C C C C C C C C C C C C C	numly to evaluate your own performance and discuss your career development with your manager.	
Email *Email Subject Upcoming Performance Review *Email Text Feat	rtunity to evaluate your own performance and discuss your career development with your manager.	

Next, enter the Email Information

nail Notification			Send
to a set of the			
	Select Population		
	Sciece i opdiatori		
	** Department	Performance Document Dates	
	Accounting HC US v	1/1/23 - 12/31/23	
	Review Period	Hire Date Start Range	
	2023 Annual Cycle	Select a value V Select a value V	
	Lots remain ejec		
	** Performance Document	Hire Date End Range	
	2023 Annual 360 Development Evaluation 🗸	Select a value V Select a value V	
	Fmail		
l l l l l l l l l l l l l l l l l l l	Email Enter the be	lowInformation	
	Email Enter, the be	low/Information	
[Email Enter, the be	low/Information	
[Email Enter the be *Enail Subject Upcoming Performance Review	lowInformation	
	Email Enter, the, be "Enail Subject Upcoming Performance Review - "Final Test	low,Information	
ł	Email Enter the be "Email Subject Upcoming Parformance Review "Email Text	low/Information	
	Email Enter, the be "Email Subject Upcoming Performance Review "Email Text Freed = 12 - 10 Z = 12 E E & 9 10 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0	lowInformation	
I	Email Enter the be "Email Subject Upcoming Performance Review "Email Text Free - 2 - 8 r u 15 15 & 9 5 C &	low/Information	
	Email Enter, the be	Information	
	Email Enter, the be "Email Subject Upcoming Performance Review "Email Text Ferst - 2 - 8 I U II III & S 9 9 C 4 The annual performance review cycle is about to start. This is a valuable opport	low Information	
	Email Enter the be "Email Subject Upcoming Purformance Review "Email Text Ford 2 - 0 / 0 / 0 / 0 / 0 / 0 / 0 / 0 / 0 / 0	unity to evaluate your own performance and discuss your career development with your manager.	
	Email Enter, the be "Enail Subject Upcoming Performance Review "Email Tex Tex = 2 - 8 I U III IIII IIII IIIIIIIIIIIIIIIII	low Information	
1	Email Enter the be	Low Information	

Click Send

Select P	opulation	Click Send	
** Depart	ment	Performance Document Dates	
Review Pr	eriod	Hire Date Start Range	
2023 An	nual Cycle v	Select a value V Select a value V Hire Date End Range	
2023 An	nual 360 Development Evaluation	Select a value V Select a value V	
Email			
Email *Email Su Upcomin	Ibject Ing Performance Review		
Email "Email Su Upcomin "Email Su "Email Su	Nývet ng Farformance Review xt - 2 - a ⊥ u t∷ ∷ @ o o o o de Age		

Transfer Performance Documents

Navigation: Home>My Client Groups>Performance>Performance Document> Search and Select Document>Actions>Transfer>Enter Details>Submit

From the home screen, click **My Client Groups**

= vision	Q Sea	rch for people and actions						p 🐢 🔋
	Good morning, H	IR Specialist	(Curtis Fe	itty)!				0.0
0 0 0 0 0 0	Me My Team My Client Groups Tools Configuration My Reporting							0 0 0 0
	QUICK ACTIONS	APPS Click	My Client Groups					
	Hire an Employee	ජීතී	0*	₽⁄1		± ₽		000
		Hiring		Person Management		யர் Time Management		0,00,000
	🖓 Change Assignment							, (° 0 ° 0
0000 00	[월] Change Manager	Compensation	<u>M</u> O Graek	Performance	BB/	Parrol		
0 ⁰⁰ 0 ° 0	vy reminauon ⊗y Transfer				Structures			000 9
	Checklist Templates	议	51					
	Act as Proxy Manager							h

Next, click **Performance**

= vision	Q 56	earch for people and actions					ት 🕁 🤹
	Good morning, HR Specialist (Curtis Feitty)! Me My Team My Client Groups Tools Configuration My Reporting						
	හි" Hire an Employee බූ Change Working Hours හිදු Change Assignment	පීරි Hiring	New Person	Person Management		Time Management	
	हिं Change Manager छिंद्र Termination	Compensation	<u>පි</u> ම ංඝ	Performance	Workforce Structures	Payroll	
	्युत्र । Iransfer कि Checkist Templates क्रि/ Act as Proxy Manager	Data Exchange	Safety Incidents	+	Click Pe	erformance	
	Show More						

Click Performance Document

SION		
erformance		
What do yo	u want to do or manage?	
Search for tasks	9	
Administ	ation	
	(formance Documents	
	Innance potentiens	
Page Page Page Page Page Page Page Page	rticipant Feedback Click Performance Documents	
See. Pr	rformance Document Eligibility	
Pierre Pi	ocess Mass Actions for Performance Documents	
Columbia	FT. (200.00	
Setup Ma	Intenance	
R	view Periods	
一	lestions	
78 Q	estionnaire Templates	

Search for the **Performance Document** by entering the **Review Period**, **Performance Document**, and **Employee**

■ VISION ✓ Performance Documents			Q 🗋 🏠 🏳 💭 🦉
Search Performance Doc	euments		
Test Sarah X Q	Hide Filters Review Period McA Annual Evaluation 2022-23	Assignment Status Active X	
Saved Search	□ Actions ∨	Sort By Last Name - A to Z	~
Save	TS McA Annual Performance FY2023 Test Sarah	1000009	
Filters Reset 🔅	Payroll Time Specialist		
Enter _s the below informati	Assignment Status Active - Payroll Eligible	Manager Test Rachel	
 ∧ Review Period * McA Annual Evaluation 2022 ∨ 	Document Status In progress	Current Task Manager Evaluation of Workers In Progress	
∽ Employee Clear Test Sarah ✓			
^ Manager			
> Department			
✓ Assignment Status			

Select the **Performance Document**

VISION Performance Docum	nents			오 습 ☆ 尸 샤
6.6.6				
	Search Performance Document	S		
	Test Sarah X Q Hide Filt	Review Period McA Annual Evaluation 20.	22-23 Assignment Status Active X	»
	Saved Search	Actions V	Sort By Last	Name - A to Z 🛛 🗸
	 ✓ Save 	Select McA Annual Performance FY2023 TS Test Sarah	1000009	
	Select Document	Assignment Status	Manager Test Bachel	
	~ Review Period *	Document Status	Current Task Mananer Evaluation of Workers Lin Provvess	
	McA Annual Evaluation 2022 V	mpogeo	manager endoarder er menters (ni hogress	
	A Performance Document Clear McA Annual Performance FY >			
	Clear Clear			
	~ Manager			
	~			
	∧ Department			
	V Assistment City			

Select Actions then Transfer

vision		く 〇 ☆ 戸 🖓
Y Performance Documents		Create Document Send Email Notification
Search Performance Docu	iments	
Test Sarah X Q	Hide Filters Review Period McA Annual Evaluation 2022-23 Assignment Status Active X >>	
Saved Search	Sort By Last Name - A to Z	~
∠ Save	Complete Click Actions 1000009	-
Filters Reset 🔅	Cancel Manager	
Expand All Collapse All	Delete Test Rachel	
 Review Period * 	Transfer Current Task Change Due	
Mick Alimonia Evaluation 2022 *	Move Task Back Click Transfer	
McA Annual Performance FY ~	Send Email for Overdue Task	
~ Employee Clear		
Test Sarah v		
∧ Manager		
×		
~ Department		

Enter the **Document Details** and click **Submit**

insier Performa	ance Documents			Submit
	Selected Employees - 1			Click Submit
	Document Details	Enter the be	lowinformation	
	"New Manager		Reason	
	Frank Adams	v	Task owner request	 ✓
	Trank Adams	v.	Task owner request	
	Trank Adams	×.	Task owner request	

Change Due Date

Navigation: Home>My Client Groups>Performance>Performance Document> Search and Select Document>Actions>Change Due Date>Enter Details>Submit

From the home screen, click My Client Groups

= vision	Q s						습 🌣 Þ 👶 🔋			
	Good morning, Me My Team My Clie	d morning, HR Specialist (Curtis Feitty)! My Team My Client Groups, Tools Configuration My Reporting								
	QUICK ACTIONS	APPS Click	My Client Groups							
	Hire an Employee	රීත් Hiring	New Person	Person		tīme,				
0000000	🖓 Change Assignment			Management		Management				
	한 Change Manager	Compensation	හිම _{Goals}	Performance	Workforce Structures	Payroll				
	♂ Transfer Checklist Templates	Data Eschange	Safety Incidents	+						
THE STATE	میں Act as Proxy Manager Show More									
	Things to Finish							P		

Next, click Performance

= vision	Q se	arch for people and actions					습 추 년 🍓 🔋
0.96	Good morning, I	HR Specialist	(Curtis Fe	itty)!			
	Me My Team My Client Groups Tools Configuration My Reporting						
	QUICK ACTIONS	APPS					
	Hire an Employee	ĥů	×	Nr∕r		Ē	
0 0 0 0 0		Hiring		Person Management		Time Management	
	🖅 Change Assignment						
0,0000	Change Manager	1 0%	Ŷ©	剞	Ba/		
	by Termination				Workforce Structures		
U 0 0	👷 Transfer				Click Pe	erformance	
	Checklist Templates			+	1/4	HIT WORK	
	Act as Proxy Manager	Data Dunange	salety incidents				
	This are to Finish						

Click Performance Document

≡ Vision < Performanc	e	く 🗅 🌣 Þ 🦆 🔋
	What do you want to do or manage?	
	Search for tasks Q	
	Administration	
	Performance Documents	
	Participant Feedback Click Performance Documents	
	Performance Document Eligibility	
	Process Mass Actions for Performance Documents	
	Setup Maintenance	
22 전 2 전	Review Periods	
	Questions	
	Questionnaire Templates	
·石中市市中市市市		

Search for the **Performance Document** by entering the **Review Period**, **Performance Document**, and **Employee**

Vision		Q 🏠 ☆ 🏳 💭
Search Performan	e Documents	
Test Sarah	X Q Hide Filters Review Period McA Annual Evaluation 2022-23 Assignment Status Active X	»
Saved Search	Sort By Last Name - A to Z	 V
×	Save TS McA Annual Performance FY2023 Test Sarah 1000009	
Filters F	set & Payroll Time Specialist Assimment Status Mananer	
	Active - Payroll Eligible Test Rachel	
 Review Period * McA Annual Evaluation 202 	Document Status Current Task In progress Manager Evaluation of Workers In Progress	
A Performance Document McA Annual Performance F	Clear V	
∽ Employee Test Sarab	Char	
^ Manager		
	v l	
∧ Department	- -	
✓ Assignment Status		

Select the **Performance Document**

= vision					익습☆ 두 🐢 🔋
< Performance Docu	iments			(Create Document Send Email Notification
	Search Performance Docu	ments			
	Test Sarah X Q	Hide Filters Review Period McA Annual Evaluation 2022	-23 Assignment Status Active ×	»	
	Saved Search	Actions V	Sort B	Last Name - A to Z V	
	√ Save	Select McA Annual Performance FY2023 TS Test Sarah Payroll Time Specialist	1000009		
	Select Document	Assignment Status Active - Payroll Eligible	Manager Test Rachel		
	~ Review Period * McA Annual Evaluation 2022 ~	Document Status In progress	Current Task Manager Evaluation of Workers In Pr	ogress	
	A Performance Document Clear McA Annual Performance FY				
	Employee Clear				
	∧ Manager				
	∽ Department				
	~ ·				
	Assignment Status				

Select Actions then Change Due Date

vision				<u>م</u> ۵	☆ Þ 🐢
Performance D	ocuments			Create Document	Send Email Notifica
	Search Performance Document	s			
	Find person from results Q Hide Filt	ers Review Period McA Annual Evaluation	2022-23 Assignment Status Active ×	»	
	Saved Search	Actions V	Sort By Last Name	- A to Z 🗸	
	✓ Save	Complete Select Action	1000000		
	Filters Reset O	Cancel	100005		
	Frend All College All	Restore	Manager		
	Expand All Conapse All	Delete	Test Rachel		
	A Review Period *	Transfer	Current Task		
	McA Annual Evaluation 2022 V	Change Due Date	Manager Evaluation of Workers In Progress		
	Derformance Document Class	Move Task Back Move Task Forward	ck Change Due Date		
	McA Annual Performance FY ~	Send Email for Overdue Task			
	Test Sarah				
	^ Manager				
	× .				
	 Department 				
					1.1.1.1
	V Assignment Status				

Enter the Tasks information and click Submit

= VISION		오 습 🌣 Þ 🏟 🔋
Change Due Dates		Submit Cancel
Selected Employees -	Click Submit	
Document Details	~	
Tasks	Enterthe/below/information	
Task Worker Self-Evaluation Role Worker	Due Date in Template Revised Due Date 2/31/23 00	
Task Manager Evaluation of Workers Role Manager	Due Date in Template Revised Due Date 2/31/23 %	
Task Manage Participant Feedback Role Manager	Due Date in Template Revised Due Date 2/31/23 %	
Task First Approval Role Manager	Due Date in Template Revised Due Date 3/31/23 %	
Task Confirm Review Meeting Held	Due Date in Template Revised Date	<u></u>

Cancel Performance Documents

Navigation: Home>My Client Groups>Performance>Performance Document> Search and Select Document>Actions>Cancel>Enter Details>Submit

From the home screen, click **My Client Groups**

= vision	Q Search	n for people and actions						ı 🏟 🔋
10 90 Mar	Good morning, H	R Specialist	(Curtis Fe	itty)!				200
0 0 0 0 0 0	Me My Team My Client G	roups Tools Co						
	QUICK ACTIONS	APPS Click	My Client Groups					
	Hire an Employee	ന്പ	&*	₽v⁄r		± the second se		
		Hiring		Person Management		Time Management		
0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0	🖅 Change Assignment							
	Change Manager	1 0%	Ŷ	60	67 /			
0000		Compensation		Performance	Workforce Structures			
0	2 Iranster	Ŕ	e,					
	Act as Proxy Manager		Safety Incidents	+ //				
towner of the second								
N. XEZMEL	Shaw Mare							
	Things to Finish							

Next, click **Performance**

= vision	Q 56	earch for people and actions					ት 🕁 🤹
	Good morning, T Me My Team My Clier Guick Actions	HR Specialist 11 Groups Tools Co 1995	(Curtis Fe	itty)! Reporting			
	හි" Hire an Employee බූ Change Working Hours හිදු Change Assignment	පීරි Hiring	New Person	Person Management		Time Management	
	हिं Change Manager छिंद्र Termination	Compensation	<u>පි</u> ම ංඝ	Performance	Workforce Structures	Payroll	
	्युत्र । Iransfer कि Checkist Templates क्रि/ Act as Proxy Manager	Data Exchange	Safety Incidents	+	Click Pe	erformance	
	Show More						

Click Performance Document

Verformance What do you want to do or manage? Sereth for tasks Administration Performance Documents Performance Document Eligibility Process Mass Actions for Performance Documents Setup Maintenance Setup Maintenance Opersionality Englates	ision		
What do you want to do or manage? Image: Contract of the transe Contract of the transe <th>Performance</th> <th></th> <th></th>	Performance		
What do you want to do or manage? Image: Contract of the ranker Image: Contract of		CHANNY NA MANANA MA T	
Secret for trans Administration Performance Documents Performance Document Eigibility Performance Documents Setup Maintenance Setup Maintenance Performance Documents		What do you want to do or manage?	
Sever for mass Administration Performance Documents Performance Documents Performance Documents Performance Documents Process Mass Actions for Performance Documents Setup Maintenance Pocess Mass Actions for Performance Documents Process Mass Actions for Performance Documents			
Administration @performance Documents @performance Document Eligibility @performance Document Eligibility @performance Documents Setup Maintenance @performance Decuments Setup Maintenance @performance Documents		Search for tasks Q	
Administration Image: Performance Documents Image: Performance Document Eligibility Image: Performance Documents Im			
Image: Construct of		Administration	
Image: Section state of the section stat			
Image: Terrormance Documents Image: Terrormance Documents <td< td=""><td></td><td></td><td></td></td<>			
Image: Section and Feedback Click Performance Documents Image: Section and Feedback Click Performance Documents Image: Section and Feedback Section for Performance Documents Image: Section and Feedback Section for Performance Documents Image: Section and Feedback Section for Performance Documents Image: Section and Feedback Section and Feedback		Performance Documents	
Image: Section			
Image: Section for Performance Documents		Participant Feedback Click Performance Documents	
Image: Setup Maintenance Image: Setup Ma			
Image: Setup Maintenance Setup Maintenance Image: Setup Maintenance Image: Setup Maintenance			
Setup Maintenance Setup Maintenance Image: Setup Maintenance Image: Setup Maintenance		Performance Document Eligibility	
Image: Setup Maintenance Image: Se			
Setup Maintenance		Brocase Mass Actions for Parformance Documents	
Setup Maintenance		Focus mas Actors for Ferromance Deciments	
Setup Maintenance Image: Setup Maintenance Image: Setup Maintenance Image: Setup Main			
Setup Maintenance			
Setup Mainter and Ce Image: Setup Mainter		Satur Maintonanco	
Image: Service Periods Image: Service Periods <t< td=""><td></td><td>Setup Maintenance</td><td></td></t<>		Setup Maintenance	
Image: Weight of the second			
Questions Questionnaire Templates		Review Periods	
Image: Comparison of the second descent desce			
Questions Questionnaire Templates			
(Westionnaire Templates		Coronalia	
Questionnaire Templates			
		Questionnaire Templates	
그는 것을 잘 했는 것 같아요. 이렇게 가지 않는 것이 같아요. 이렇게 나는 것이 같아요. 이렇게 가지 않는 것이 같아요. 이렇게 하는 것이 않는 것이 같아요. 이렇게 하는 것이 같아요. 이렇게 아니 않는 것이 같아요. 이렇게 하는 것이 같아요. 이렇게 하는 것이 같아요. 이렇게 아니 않는 것이 않는 것이 같아요. 이렇게 않는 것이 않는 것이 않는 것이 같아요. 이렇게 않는 것이 않 하는 것이 않는 것이 않 않는 것이 않는 것이 않는 것 않는 것이 않이 않 않는 것이 않는 것이 않는 것이 않는 것이 않. 이 않 않는 것이 않이 않는 것이 않는 것이 않는 않이 않는 않			

Search for the **Performance Document** by entering the **Review Period**, **Performance Document**, and **Employee**

■ VISION ✓ Performance Documents			Q 🗋 🏠 🏳 💭 🦉
Search Performance Doc	euments		
Test Sarah X Q	Hide Filters Review Period McA Annual Evaluation 2022-23	Assignment Status Active X	
Saved Search	□ Actions ∨	Sort By Last Name - A to Z	~
Save	TS McA Annual Performance FY2023 Test Sarah	1000009	
Filters Reset 🔅	Payroll Time Specialist		
Enter _s the below informati	Assignment Status Active - Payroll Eligible	Manager Test Rachel	
 ∧ Review Period * McA Annual Evaluation 2022 ∨ 	Document Status In progress	Current Task Manager Evaluation of Workers In Progress	
∽ Employee Clear Test Sarah ✓			
^ Manager			
> Department			
✓ Assignment Status			

Select the **Performance Document**

VISION Performance Docum	nents			오 습 ☆ 尸 샤
6.6.6				
	Search Performance Document	S		
	Test Sarah X Q Hide Filt	Review Period McA Annual Evaluation 20.	22-23 Assignment Status Active X	»
	Saved Search	Actions V	Sort By Last	Name - A to Z 🛛 🗸
	 ✓ Save 	Select McA Annual Performance FY2023 TS Test Sarah	1000009	
	Select Document	Assignment Status Active - Payroll Elicible	Manager Test Bachel	
	~ Review Period *	Document Status	Current Task Mananer Finalisation of Workers Lin Provines	
	McA Annual Evaluation 2022 V	mpogeo	manager endoarder er menters (ni hogress	
	A Performance Document Clear McA Annual Performance FY >			
	Clear Clear			
	~ Manager			
	~			
	∧ Department			
	V Assistment City			

Select Actions then Cancel

= vision			익 습 ☆ ᄇ 🕫 🧯
< Performance Documents			Create Document Send Email Notification
Search Performance Doc	uments		
Find person from results	Hide Filters Review Period McA Annual Evaluation 2022-23	Assignment Status Active × >>	
Saved Search	Actions V	Sort By Last Name - A to Z	
✓ Save	Complete Click Actions	. 1000009	•
Filters Reset 🌣	Cancel	Manager	
Expand All Conspise All	Delete Click Cancel	Test Rachel	
 Review Period * McA Annual Evaluation 2022 × 	Transfer Change Due Date	Current Task Manager Evaluation of Workers In Progress	
A Performance Document Clear	Move Task Back Move Task Forward		
McA Annual Performance FY 😒	Send Email for Overdue Task		
~ Employee Clear			
Test Sarah 🗸			
~ Manager			
Department			
Assignment Status			

Enter the Reason and click Submit

= vision		익 습 ☆ 戶 🐢 🔋
Cancel Perforn	nance Documents	Submit Cancel
	Selected Employees - 1	Click Submit
	Reason	
	Task owner request	
	홍수는 것은 것은 것을 수 있는 것을 것 같아. 것은 것을 수 없는 것을 수 없는 것을 것 같아.	생활 승규는 가슴을 물고 가슴을 들었다. 나는 나는 것이 같아요. 나는 나는 것이 같아요. 나는 것이 않 것이 같아요. 나는 것이 않 것이 같아요. 나는 것이 않 것이 같아요. 나는 것이 않 것이

Delete Performance Documents

Navigation: Home>My Client Groups>Performance>Performance Document> Search and Select Document>Actions>Delete>Enter Details>Submit

From the home screen, click **My Client Groups**

= vision	Q	Search for people and actions					습 추 년 🤹 [
	Good morning, Me My Team My Clia	HR Specialist	(Curtis Fe	itty)! Reporting			
	QUICK ACTIONS	APPS Click	My Client Groups				
	안 [#] Hire an Employee	රීත් Hiring	New Person	Person Management		Time Management	
	िंग Change Assignment हिंहे Change Manager	500 B	<u>8</u> 0	61	57/		
0 ⁰⁰ 0 0 0	⊗y Termination ⊗y Transfer		Goals		Workforce Structures		
	Checklist Templates	Data Exchange	Safety Incidents	+			
	Things to Finish						

Next, click **Performance**

= vision	Q se	arch for people and actions					습 추 년 🍓 🔋
0.96	Good morning, I	HR Specialist	(Curtis Fe	itty)!			
	Me My Team My Clien	t Groups Tools Co					
	QUICK ACTIONS	APPS					
	Hire an Employee	ĥů	×	Nr∕r		Ē	
0 0 0 0 0		Hiring		Person Management		Time Management	
	🖅 Change Assignment						
0,0000	Change Manager	1 0%	Ŷ©	剞	Ba/		
	by Termination				Workforce Structures		
U 0 0	👷 Transfer				Click Pe	erformance	
	Checklist Templates			+	1/4	HIT WORK	
	Act as Proxy Manager	Data Dunange	salety incidents				
	This as a right						

Click Performance Document

	Q () ☆ P 🕫 [
What do you want to do or manage?	
Search for tasks Q	
Administration	
B Performance Documents	
Barricipant Feedback Click Performance Documents	
B Performance Document Eligibility	
Process Mass Actions for Performance Documents	
Setup Maintenance	
Review Periods	
Questions	
Questionnaire Templates	

Search for the **Performance Document** by entering the **Review Period**, **Performance Document**, and **Employee**

vision		< ○ ☆ 口 🌣
Performance Documents		Create Document Send Email Not
Search Performance Doc	ments	
Test Sarah X Q	Hide Filters Review Period McA Annual Evaluation 2022-23 Assignment Status Active × >>	
Saved Search	Sort By Last Name - A to Z	×
Save	TS McA Annual Performance FY2023 Test Sarah 1000009	
Filters Reset 🔅	Payroll Time Specialist	
Enter the below informati	Assignment Status Manager Active - Payroll Eligible Test Rachel	
∧ Review Period * McA Annual Evaluation 2022 ∨	Document Status Current Task: In progress Manager Evaluation of Workers In Progress	
← Employee Clear Test Sarah ✓		
∧ Manager		
 Department 		
· · · · · · · · · · · · · · · · · · ·		

Select the **Performance Document**

= vision			م	습 & 면 🕫 🧯
< Performance Documents			Create Do	cument Send Email Notification
				6.6.0
Search Performance Docur	nents			
Test Sarah X Q H	ide Filters Review Period McA Annual Evaluation 2	2022-23 Assignment Status Active ×	»	
Saved Search	Actions V	Sort By	Last Name - A to Z V	
√ Save	Select McA Annual Performance FY2023 TS Test Sarah Pavroll Time Specialist	1000009		
Select Document	Assignment Status Active - Payroll Eligible	Manager Test Rachel		
	Document Status In progress	Current Task Manager Evaluation of Workers In Pro	ogress	
∽ Employee Clear Test Sarah ✓				
∽ Manager				
A Department				
✓ Assignment Status				-

Select **Actions** then **Delete.** As a note, if the **Delete** option is grayed out, the configurations do not support deleting a performance document; the configurations must be updated to allow a Performance Admin to delete a Performance Document

VISION	ocuments		
	ocuments		
	Search Performance Documents		
	Find person from results Q Hide Filters Review Period McA Annual Evaluation 2022	23 Assignment Status Active × >>>	
	Saved Search	Sort By Last Name - A to Z	
	Save Complete Click Actions		
	Filters Reset & Cancel	Manager	
	Expand All Collapse All Delete	Test Rachel	
	Review Period * Transfer Change Due Date Click Delete	Current Task Manager Evaluation of Workers In Progress	
	McA Annual Evaluation 2022 V Move Task Back		
	A Performance Document Clear Move Task Forward Move Task Forward Send Email for Overdue Task		
	Test Sarah		
	∧ Manager		
	∧ Department		
	v		
	✓ Assignment Status		

Enter the **Reason** and click **Submit**

= vision	익 🗅 ☆ 🏳 🔎 🔋
Cancel Performance Documents	Sub <u>m</u> it Cancel
Cick Submit	
Reason	
Task owner request	
Select Reason	

Delete Participant Feedback

Navigation: Home>My Client Groups>Performance>Participant Feedback>Actions>Delete>Yes>Submit

From the home screen, click My Client Groups

= vision	Q Search for people and actions								ı 🏟 🔋
10 90 Mar	Good morning, H			200					
0 0 0 0 0 0	Me My Team My Client G	roups Tools Co							
	QUICK ACTIONS	APPS Click	My Client Groups						
	Hire an Employee	ന്പ	&*	₽ø		± the second se			
		Hiring		Person Management		Time Management			
0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0	🖅 Change Assignment								
	Change Manager	1 0%	Ŷ	60	67 /				
0000		Compensation		Performance	Workforce Structures				
0	2 Iranster	Ŕ	e,						
	Act as Proxy Manager		Safety Incidents	+ //					
towner of the second									
N. XEZMEL	Shaw Mare								
	Things to Finish								

Next, click **Performance**

= vision	Q 56		ት 🕁 🤹					
	Good morning, HR Specialist (Curtis Feitty)! Me My Team My Client Groups Tools Configuration My Reporting							
	හි" Hire an Employee බූ Change Working Hours හිදු Change Assignment	පීරි Hiring	New Person	Person Management		Time Management		
	हिं Change Manager छिंद्र Termination	Compensation	<u>පි</u> ම ංඝ	Performance	Workforce Structures	Payroll		
0	्युत्र । Iransfer कि Checkist Templates क्रि/ Act as Proxy Manager	Data Exchange	Safety Incidents	+	Click Pe	erformance		
	Show More							

Click Participant Feedback

ision		< 스 쇼 뇬 📬
Performance		
	What do you want to do or manage?	
	Search for tasks Q	
	Administration	
	Administration	
	Click Participant Feedback	
	Barticipant Feedback	
	Reformance Document Eligibility	
	Process Mass Actions for Performance Documents	
	Setup Maintenance	
	Review Periods	
	Questions	
	Questionnaire Templates	
	moscom/hcmU/VisceVelcome? edictif-state=1bsins7nh 1	

Search for the Participant Feedback by entering the Filters information

Participant Foodbd	ak					
ratucipant reeuba						
No. or or	- Sedi er renkielpahit i zeabe					
	Find person from results	Hide Filter	Review Period 2021 Annual Cycle Document Statu	s In progress \times Assignment Status Active \times	*	
	Saved Search		Actions V	Sort By Participant	Last Name - A t $ \smallsetminus $	
	✓ Save		Participant	Feedback Status		
			Guy Mattran Associate	Awaiting reply		
	Filters Reset 🌣		2021 Annual 360 Evaluation	Flizabeth Mavery		
Friend Frieder	Evennd All Collapse All		Document Status In progress	577		
Ente	er the below informatio	n	Director of HR Service Desk			
	Review Period *		Assignment Status	Manager		
	2021 Annual Cycle		Active - Payroll Eligible	Robert Jackman		
	 Performance Document 		Participant	Feedback Status		
	×		Elizabeth Mavery Associate	Completed		
12 17 동안은 18			2021 Annual 360 Development Evaluation	Brian Joseph		
	 Participant 		Document Status In progress	100		
	×		Director of Payroll			
			Assignment Status	Manager		
	~ Employee		Active - Payroll Eligible	Robert Jackman		
	×					
			Participant	Feedback Status		
	^ Manager Manager		Elizabeth Mavery Associate	Completed		
	Robert Jackman 🗸		2021 Annual 360 Evaluation	Frank Pukta		
		1	Document Status In progress	576		
	 Department 		Director of Human Resources			
	×		Assignment Status	Manager		
			Active - Payroll Eligible	Robert Jackman		
	V Document Status					-1-11-11-

Select the Participant

r articipant recuback				
Find person from results	Hide Filters Review Period 2021 Annual Cycle D	ocument Status In progress × Assignment Status Active ×	»	
Council Council				
Saved Search	Select	Sort By Participan	t Last Name - A 1 V	
✓ Save	Participant	Feedback Status		
	Guy Mattran Associate	Awaiting reply		
Select Participant				
	2021 Annual 360 Evaluation	Elizabeth Mavery		
Expand Air Conapse Air	Document status in progress	517		
- Deview Devied t	Director of HR Service Desk			
A Review Period	Assignment Status	Manager		
2021 Annual Cycle V	Active - Payroll Eligible	Robert Jackman		
 Performance Document 	Participant	Feedback Status		
×	Elizabeth Mavery Associate	Completed		
	2021 Annual 360 Development Evaluati	ion Brian Joseph		
 Participant 	Document Status In progress	100		
×	Director of Payroll			
	Assignment Status	Manager		
 Employee 	Active - Payroll Eligible	Robert Jackman		
×				
	Participant	Feedback Status		
A Manager Clear	Elizabeth Mavery Associate	Completed		
Robert Jackman	2021 Annual 360 Evaluation	Frank Pukta		
	Document Status In progress	576		
 Department 	Director of Human Resources			
	Assignment Status	Manager		
	Assignment status	Dalaast laskesse		

Select Actions then Delete

ISION						
Participant Foodboo]r					
Farticipant Feedbac	K					
	MATTER ALLER A	10 78 R V			405 10 10	
S	earch Participant Feedba	ck				
	Find person from results	Hide Filter	rs Review Period 20 Click Actions	tatus In progress × Assignment Status Active ×	>	
	Saved Search		Actions	Sort By Participant Last Nam	e - A t 🗸	
	 ✓ Save 	✓	Reopen	Feedback Status		
	Filters Reset 🔅		Change Due Date	Elizabeth Mavery		
	Expand All Collapse All		Document Status In progress	577		
	A Review Period *		Assignment Status	Manager		
	2021 Annual Cycle 🗸		Active - Payroll Eligible	Robert Jackman		
	 Performance Document 		Participant Elizabeth Mavery Associate	Feedback Status Completed		
			2021 Annual 360 Development Evaluation	Brian Joseph		
	 Participant 		Document Status in progress Director of Payroll	100		
	Employee A Second Sec		Assignment Status	Manager Rohert Jackman		
	× *		Ficure 1 ayron angune			
	 Manager Clear 		Participant Elizabeth Mavery Associate	Feedback Status Completed		
	Robert Jackman 🗸		2021 Annual 360 Evaluation	Frank Pukta		
			Document status in progress	570		

Enter the Reason and click Submit

= vision		く 🗅 🌣 🛯 🔋
Delete Participan	t Feedback	Sub <u>m</u> it
	Selected Participants (1)	Click Submit
	Reason	
	Task owner request	
	Select Reason	
		—

Complete Performance Documents

Navigation: Home>My Client Groups>Performance>Performance Document> Search and Select Document>Actions>Complete>Enter Details>Submit

From the home screen, click My Client Groups

= vision	Q :						습 & 두 🗘 🏮
	Good morning, Me My Team My Clie	HR Specialist					
	QUICK ACTIONS	APPS Click	My Client Group	s			
	හි [™] Hire an Employee ඬූ Change Working Hours භී⁄/ Change Assignment	රිරි Hiring	New Person	Person Management		Time Management	
	Change Manager	Compensation	HO Goals	000 Performance	Workforce Structures	Payroll	
0 0 0 0	िंग Transfer 🏥 Checkiss Templates क्षेत्र' Act as Praxy Manager	Data Escharge	Safety Incidents	+			

Next, click Performance

= vision	Q se	Q Search for people and actions							
0.96	Good morning, I	HR Specialist	(Curtis Fe	itty)!					
	Me My Team My Clien	t Groups Tools Co							
	QUICK ACTIONS	APPS							
	Hire an Employee	ĥů	×	Nr∕r		Ē			
0 0 0 0 0		Hiring		Person Management		Time Management			
	🖅 Change Assignment								
0,0000	Change Manager	1 0%	Ŷ©	剞	Ba/				
	by Termination				Workforce Structures				
U 0 0	👷 Transfer				Click Pe	erformance			
	Checklist Templates			+	1/4	HIT WORK			
	Act as Proxy Manager	Data Dunange	salety incidents						
	This as a right								

Click Performance Document

	Q () ☆ P 🕫 [
What do you want to do or manage?	
Search for tasks Q	
Administration	
B Performance Documents	
Barricipant Feedback Click Performance Documents	
B Performance Document Eligibility	
Process Mass Actions for Performance Documents	
Setup Maintenance	
Review Periods	
Questions	
Questionnaire Templates	

Search for the **Performance Document** by entering the **Review Period**, **Performance Document**, and **Employee**

VISION Performance Documents			Q 🛆 ☆ Þ 💭
Search Performance	Documents		
Test Sarah >	Q Hide Filters Review Period McA Annual Evaluation 2022	-23 Assignment Status Active × >>	
Saved Search	□ Actions ∨	Sort By Last Name - A to Z	
∽ Sa	TS McA Annual Performance FY2023 Test Sarah	1000009	
Filters Reset	Payroll Time Specialist		
Enter the below inform	Assignment Status Active - Payroll Eligible	Manager Test Rachel	
	Document Status In progress	Current Task Manager Evaluation of Workers In Progress	
^ Performance Document C McA Annual Performance FY ∨	lear		
∽ Employee C Test Sarah ✓	lear		
~ Manager	_		
∧ Department			
V Assignment Status			

Select the **Performance Document**

= vision				옥습☆戸 🐢 🔋
Performance Documents				Create Document Send Email Notification
Search Performance Do	ocuments			
Test Sarah × Q	Hide Filters Review Period McA Annual Evaluation 2022-	23 Assignment Status Active ×	»	
Saved Search	Actions V	Sort By Las	t Name - A to Z $\qquad \lor$	
√ Save	Select McA Annual Performance FY2023	1000009		
Select Document	Payroll Time Specialist Assignment Status	Manager		
∧ Review Period *	Active - Payroll Eligible Document Status	Test Kachel Current Task		
McA Annual Evaluation 2022 V	In progress	Manager Evaluation of Workers in Progress		
A Performance Document Clear McA Annual Performance FY				
^ Employee Clear				
Test Sarah 🗸				
~ Manager				
∧ Department				
×				
✓ Assignment Status				

Select Actions then Complete

= vision			< 이 주 타 🍓 🚦
Performance Documents			Create Document Send Email Notification
Search Performance Doc	uments		
Find person from results Q	Hide Filters Review Period M Click Actions Ass	ignment Status Active X >>>	
Saved Search	□ Actions ∨	Sort By Last Name - A to Z	
Save	Complete Reopen	1000009	
Filters Reset 🌣 Expand All Collapse All	Cancel Click Complete	Manager Test Rachel	
∧ Review Period *	Transfer Change Due Date	Current Task Manager Evaluation of Workers in Progress	
Performance Document Clear	Move Task Back Move Task Forward		
McA Annual Performance FY 😒	Send Email for Overdue Task		
 ^ Employee Clear Test Sarah 			
^ Manager			
▲ Decartment			
✓ Assignment Status			

Enter the **Reason** then click **Submit**

= vision	< 스 슈 타 📬 🔋
Complete Performance Documents	Sub <u>m</u> it Cancel
Selected Employees - 1	Click Submit
Reason	
Reador Task owner request	
Enter Reason	
	—

Reopen Performance Documents

Navigation: Home>My Client Groups>Performance>Performance Document> Search and Select Document>Actions>Reopen>Enter Details>Submit

From the home screen, click **My Client Groups**

= vision	Q Search	for people and actions					습 추 년 诡 🔋
Lei de Stati	Good morning, HI						
0 0 0 0 0	Me My Team My Client Gro						
	QUICK ACTIONS	APPS Click	My Client Groups				
	Hire an Employee	്ന്	×0	₽v/		in the second s	
		Hiring		Person Management		Time Management	
0 0 0 0 0 0 0 0	Change Assignment						
	Change Manager	10% 10%	Ŷ	đ			
0000	∑y Termination	Compensation	Goals	Hertormance	Wondforce Structures	Раутон	
0	y iranster	段	5				
	ana Act as Proxy Manager	Data Exchange	Safety Incidents	Ť			
STATE OF STATE	Show Mare						
	Things to Finish				$m_{1}^{*} + m_{2}^{*} + m_{1}^{*} + m_{1$		

Next, click **Performance**

= vision	Q Sea	rch for people and actions					ſ	그 ☆ 🖆 🔋
	Good morning, HR Specialist (Curtis Feitty)! Me My Team My Client Groups Tools Configuration My Reporting							
	(Girk Ru Hons)	එන Ľරෝ Hiring	New Person	Person Management		Time Management		
	전 Change Manager 안 Termination	Compensation	20 Coais	Artormance	Workforce Structures	Payrol		
· · ·	Checkist Templates Act as Pray Manager	Data Exchange	Safety Incidents	+	Click Pe	rformance		
	Show Mare Things to Finish							

Click Performance Document

vision		く 🗅 🌣 🏳 🕫
Performance		
	What do you want to do or manage?	
	Search for tasks Q	
	Administration	
	Reformance Documents	
	Barticipant Feedback Click Performance Documents	
	Reformance Document Eligibility	
	B Process Mass Actions for Performance Documents	
	Setup Maintenance	
	Review Periods	
	Questions	
	Ouestionnaire Templates	
	Questionnaire reinpares	

Search for the **Performance Document** by entering the **Review Period**, **Performance Document**, and **Employee**. Click the carrot to view the filters applied to the search. Remove all filters except Review Period, Performance Document, and **Employee** by clicking the **X**

vision		오습☆ㄹ 🕫
Performance Documents		Create Document Send Email Notification
Search Performance Docu	uments	Click To View Filters Applied
Find person from results	Hide Filters Review Period McA Annual Evaluation 2022-23 Performance Document McA Annual Performance FY2023 ×	
Saved Search	Actions V	
∨ Save	KcA Annual Performance FY2023 Top Sample 1000009	
Filters Reset 🔅	Payroll Time Specialist	
Expand All Collapse All	Assignment Status Manager Active - Payroll Eligible Test Rachel	
 Review Period * 	Document Status	
McA Annual Evaluation 2022 V	Completed	
A Performance Document Clear		
McA Annual Performance FY \vee		
Employee Clear		
Test Sarah 🗸		
∧ Manager		
· · · · · · · · · · · · · · · · · · ·		
∧ Department		
Assignment Status		

Select the **Performance Document**

VISION Performance Docum	nents			오 습 ☆ 尸 샤
6.6.6				
	Search Performance Document	S		
	Test Sarah X Q Hide Filt	Review Period McA Annual Evaluation 20.	22-23 Assignment Status Active X	»
	Saved Search	Actions V	Sort By Last	Name - A to Z 🛛 🗸
	 ✓ Save 	Select McA Annual Performance FY2023 TS Test Sarah	1000009	
	Select Document	Assignment Status Active - Payroll Elicible	Manager Test Bachel	
	~ Review Period *	Document Status	Current Task Mananer Finalisation of Workers Lin Provines	
	McA Annual Evaluation 2022 V	mpogeo	manager endoarder er menters (ni hogress	
	A Performance Document Clear McA Annual Performance FY >			
	Clear Clear			
	~ Manager			
	~			
	∧ Department			
	V Assistment City			

Select Actions then Reopen

vision					오 습 ☆ ᄇ 🐢 [
Performance Documents					Create Document Send Email Notificatio
Search Perf	ormance Document	S			
Find person from	results Q Hide Filte	Review Period McA Annual Evaluation 2022-2	3 Performance Document McA Annual Performance FY2023 X	»	
Saved Search		Actions V	Sort By Last Name - A	to Z 🗸 🗸	
	✓ Save	Complete Click Actions	1000009		
Filters Expand All Coll	Reset 🔯	Cancel Click Reopen	Manager Tast Pachal		
∧ Review Period Mrå Annual Eval	ation 2022 V	Delete Transfer Change Due Date			
Performance D	icument Clear	Move Task Back Move Task Forward			
McA Annual Perf	Clear	Contra Lossen non Unicipales, (SUA)			
Test Sarah	~				
∧ Manager	Ý				
^ Department					
	~				
Assignment Sta	tus				

Enter the **Reason** then click **Submit**

= vision	오 습 ☆ Þ 👶 🔋
Reopen Performance Documents	Sub <u>m</u> it <u>C</u> ancel
Click Submit Selected Employees - 1	
Reason	
Task owner request	
Select Reason	
	💻 🔤 🛄 🛄

Move Task Forward

Navigation: Home>My Client Groups>Performance>Performance Document>Search and Select Document>Actions>Move Task Forward>Enter Details>Submit

From the home screen, click My Client Groups

= vision	Q Search						습 🌣 Þ 🛟 🔋
i de Maria	Good morning, H	R Specialist	(Curtis Feit	ty)!			
	Me My Team My Client Gr	oups Tools Co					
	QUICK ACTIONS	APPS Click	My Client Groups				
	Hire an Employee	ස්තු	Å*	M∕r		₽	
	Change Working Hours		New Person	Person Management		Time Management	
	Change Assignment	FOR	°@	₽n	<u>,</u>		
000		Compensation	Goals	Performance	Workforce Structures	Payroll	
	🖅 Transfer						
	Checklist Templates	Data Exchange	Safety Incidents	+			
Street Street Street	हिंगू Act as Proxy Manager						
	Things to Einish						

Next, click **Performance**

= vision	Q se	arch for people and actions					습 추 년 🍓 🔋
0.96	Good morning, I	HR Specialist	(Curtis Fe	itty)!			
	Me My Team My Clien	t Groups Tools Co					
	QUICK ACTIONS	APPS					
	Hire an Employee	ĥů	×	Nr∕r		Ē	
0 0 0 0 0		Hiring		Person Management		Time Management	
	🖅 Change Assignment						
0,0000	Change Manager	1 0%	Ŷ©	剞	Ba/		
	by Termination				Workforce Structures		
U 0 0	👷 Transfer				Click Pe	erformance	
	Checklist Templates			+	1/4	HIT WORK	
	Act as Proxy Manager	Data Dunange	salety incidents				
	This are to Finish						

Click Performance Document

	Q () ☆ P 🕫 [
What do you want to do or manage?	
Search for tasks Q	
Administration	
B Performance Documents	
Barricipant Feedback Click Performance Documents	
B Performance Document Eligibility	
Process Mass Actions for Performance Documents	
Setup Maintenance	
Review Periods	
Questions	
Questionnaire Templates	

Search for the **Performance Document** by entering the **Review Period**, **Performance Document**, and **Employee**

Vision		Q 🏠 ☆ 🏳 💭
Search Performan	e Documents	
Test Sarah	X Q Hide Filters Review Period McA Annual Evaluation 2022-23 Assignment Status Active X	»
Saved Search	Sort By Last Name - A to Z	 V
×	Save TS McA Annual Performance FY2023 Test Sarah 1000009	
Filters F	set & Payroll Time Specialist Assimment Status Mananer	
	Active - Payroll Eligible Test Rachel	
 Review Period * McA Annual Evaluation 202 	Document Status Current Task In progress Manager Evaluation of Workers In Progress	
A Performance Document McA Annual Performance F	Clear V	
∽ Employee Test Sarab	Char	
^ Manager		
	v l	
∧ Department	- -	
✓ Assignment Status		

Select the **Performance Document**

= vision				오 습 ☆ ᄆ 🐢 🔋
< Performance Documents			Cre	ate Document Send Email Notification
Search Performance Docu	uments			
Test Sarah × Q	Hide Filters Review Period McA Annual Evaluation 2022-	23 Assignment Status Active ×	»	
Saved Search	Actions V	Sort	By Last Name - A to Z V	
✓ Save	Select McA Annual Performance FY2023 TS Test Sarah Bayeel Time Spacialist	1000009		
Select Document	Assignment Status Active - Payroll Eligible	Manager Test Rachel		
∧ Review Period * McA Annual Evaluation 2022 ×	Document Status In progress	Current Task Manager Evaluation of Workers In F	Progress	
Performance Document Clear Me& Annual Performance FV				
 Employee Clear Ten Foreit 				
^ Manager				
✓ A Department				
✓ Assignment Status				

Select Actions then Move Task Forward

Performance Do	cuments			Create Document Send Email
	Search Performance Docume	nts	ne one constant and an	
	Find person from results Q Hide F	Filters Review Period McA Annual Evaluat	ion 2022-23 Performance Document McA Annual Performance FY23 \times	»
	Saved Search	Actions V	Sort By Last Name - A	i to Z 🗸 🗸
	Save	Complete Reopen Click Act	1000009	
	Expand All Collapse All	Cancer Restore Delete	Manager Test Rachel	
	∧ Review Period * McA Annual Evaluation 2022 ∨	Transfer Change Due Date	Current Task Employee Self-Evaluation In Progress	
	A Performance Document Clear McA Annual Performance FY	Move Task Back Move Task Forward Send Email for Overdue Task	k Move Task Forward	
	∧ Employee Clear Test Sarah ∨			
	∧ Manager			
	∧ Department			

Enter Reason and Move Forward to Task. Click Submit

	m 1		Q _ ☆ ⊨ 🖗 🔋
Update Performance	Tasks		Sub <u>mit</u>
	Selected Employees - 1		
	Document Details		
	Performance Document Name McA Annual Performance FY23	*Move Forward to Task Manager Evaluation of Employees	
	Reason		Select Move Forward to Task
		Select Reason	
			—

Move Task Back

Navigation: Home>My Client Groups>Performance>Performance Document>Search and Select Document>Actions>Move Task Back>Enter Details>Submit

From the home screen, click My Client Groups

= vision	Q Search	for people and actions					습 추 년 诡 🔋
Lei de Stati	Good morning, HI	R Specialist	(Curtis Fe	itty)!			
0 0 0 0 0	Me My Team My Client Gro	oups Tools Ci					
	QUICK ACTIONS	APPS Click	My Client Groups				
	Hire an Employee	്ന്	×0	₽v/		in the second s	
		Hiring		Person Management		Time Management	
0 0 0 0 0 0 0 0	Change Assignment						
	Change Manager	10% 10%	Ŷ	đ			
0000	∑y Termination	Compensation	Goals	Hertormance	Wondforce Structures	Раутон	
0	y iranster	段	5				
	ana Act as Proxy Manager	Data Exchange	Safety Incidents	Ť			
STATE OF STATE	Show Mare						
	Things to Finish				$m_{1}^{*} + m_{2}^{*} + m_{1}^{*} + m_{1$		

Next, click **Performance**

= vision	Q Sea	rch for people and actions					ſ	그 ☆ 🖆 🔋
	Good morning, F	IR Specialist	(Curtis Fe	itty)! Reporting				
	(Girk Ru Hons)	එන Ľරෝ Hiring	New Person	Person Management		Time Management		
	전 Change Manager 안 Termination 안 Transfer	Compensation	<u>ko</u> cosis	Artormance	Workforce Structures	Payrol		
· · ·	Checkist Templates Act as Pray Manager	Data Exchange	Safety Incidents	+	Click Pe	rformance		
	Show Mare Things to Finish							

Click Performance Document

Verformance What do you want to do or manage? Sereth for tasks Administration Performance Documents Performance Document Eligibility Process Mass Actions for Performance Documents Setup Maintenance Setup Maintenance Opersionality Englates	ision		
What do you want to do or manage? Image: Contract of the transe Contract of the transe <th>Performance</th> <th></th> <th></th>	Performance		
What do you want to do or manage? Image: Contract of the ranker Image: Contract of		CHANNY NA MANANA MA T	
Secret for trans Administration Performance Documents Performance Document Eigibility Performance Documents Setup Maintenance Setup Maintenance Performance Documents		What do you want to do or manage?	
Sever for mass Administration Performance Documents Performance Documents Performance Documents Performance Documents Process Mass Actions for Performance Documents Setup Maintenance Pocess Mass Actions for Performance Documents Process Mass Actions for Performance Documents			
Administration @performance Documents @performance Document Eligibility @performance Document Eligibility @performance Documents Setup Maintenance @performance Decuments Setup Maintenance @performance Documents		Search for tasks Q	
Administration Image: Performance Documents Image: Performance Document Eligibility Image: Performance Documents Im			
Image: Construct of		Administration	
Image: Section state of the section stat			
Image: Terrormance Documents Image: Terrormance Documents <td< td=""><td></td><td></td><td></td></td<>			
Image: Section and Feedback Click Performance Documents Image: Section and Feedback Click Performance Documents Image: Section and Feedback Section for Performance Documents Image: Section and Feedback Section for Performance Documents Image: Section and Feedback Section for Performance Documents Image: Section and Feedback Section and Feedback		Performance Documents	
Image: Section			
Image: Section for Performance Documents		Participant Feedback Click Performance Documents	
Image: Setup Maintenance Image: Setup Ma			
Image: Setup Maintenance Setup Maintenance Image: Setup Maintenance Image: Setup Maintenance			
Setup Maintenance Setup Maintenance Image: Setup Maintenance Image: Setup Maintenance		Performance Document Eligibility	
Image: Setup Maintenance Image: Se			
Setup Maintenance		Brocase Mass Actions for Parformance Documents	
Setup Maintenance		Focus mas Actors for Ferromance Deciments	
Setup Maintenance Image: Setup Maintenance Image: Setup Maintenance Image: Setup Main			
Setup Maintenance			
Setup Mainter and Ce Image: Setup Mainter		Satur Maintonanco	
Image: Service Periods Image: Service Periods <t< td=""><td></td><td>Setup Maintenance</td><td></td></t<>		Setup Maintenance	
Image: Weight of the second			
Questions Questionnaire Templates		Review Periods	
Image: Construction of the second			
Questions Questionnaire Templates			
(Westionnaire Templates		Coronalia	
Questionnaire Templates			
		Questionnaire Templates	

Search for the **Performance Document** by entering the **Review Period**, **Performance Document**, and **Employee**

= vision			익 습 ☆ 🐢 🔋
< Performance Documents			Create Document Send Email Notification
Search Performance Doc	uments		
Test Sarah × Q	Hide Filters Review Period McA Annual Evaluation 2022-2	3 Assignment Status Active × >>	
Saved Search	□ Actions ∨	Sort By Last Name - A to Z	
√ Save	TS McA Annual Performance FY2023 Test Sarah	1000009	
Filters Reset 🔅	Payroll Time Specialist		
Enter _* the/below/informati	Assignment Status Active - Payroll Eligible	Manager Test Rachel	
	Document Status	Current Task	
McA Annual Evaluation 2022 V	in progress	Manager Evaluation of Workers [In Progress	
A Performance Document Clear			
McA Annual Performance FY V			
~ Employee Clear			
Test Sarah V			
^ Manager			
×			
^ Department			
×			
✓ Assignment Status			· 코르인

Select the **Performance Document**

■ VISION < Performance Docum	ents			Q 🏠 ☆ 🟳 🖓
Se	earch Performance Documents			
	Test Sarah × Q Hide Filters	Review Period McA Annual Evaluation 2022	23 Assignment Status Active X	»
5	aved Search	Actions V	Sort By	ast Name - A to Z
	V Save Se	McA Annual Performance FY2023 Test Sarah	1000009	
	Select Document	Assignment Status Active - Payroll Eligible	Manager Test Rachel	
^ [Serview Period * McA Annual Evaluation 2022 ∨	Document Status In progress	Current Task Manager Evaluation of Workers In Progre	55
ĺ	Performance Document Clear McA Annual Performance FY			
^ [> Employee Clear Test Sarah			
^ 	∽ Manager			
^ _	> Department			
	 Assignment Status 			

Select Actions then Move Task Back

= vision		오 🌣 Þ 👶 🔋
Performance Documents		Create Document Send Email Notification
Search Performance Documents		
Find person from results Q Hide Filters	Review Period McA Annual Evaluation 2022-23 Performance Document McA Annual Performance FY23 x	
Saved Search	Actions V Last Name - A to Z	
Save	Complete Click Actions 1000009	
Filters Reset 🏟	Cancel Manager	
Expand Yor Compute Yor	Delete Test Rachel	
	Change Due Date Manager Evaluation of Employees Ready	
	Move Task Back	
McA Annual Performance FY V	Send Email for Overdue Task Click Move Task Back	
 Employee Clear 		
Test Sarah V		
Manager		
^ Department		
· · · · · · · · · · · · · · · · · · ·		
✓ Assignment Status		· 물로 친구로 등 소리를 ¹⁹⁹⁹ :

Enter Reason and Move Back to Task. Click Submit

vision			Q () ☆ 戶 🔎
pdate Perform	ance Tasks		Submit
	Selected Employees - 1		Click Submit
	Document Details		
	Performance Document Name McA Annual Performance FY23	*Move Back to Task Employee Self-Evaluation	
	Reason Task owner request		Select Move Back to Task
		Select Reason	

Process Mass Actions for Performance Documents

Navigation: Home>My Client Groups>Performance>Process Mass Actions for Performance Documents>Add>Select Task>Enter Information>Submit

From the home screen, click My Client Groups

= vision	Q s						Ş
Soi de Station	Good morning,	HR Specialist	(Curtis Fe	itty)!			
00000	Me My Team My Clier	nt Groups Tools Ci	onfiguration My	Reporting			
	QUICK ACTIONS	APPS Click	My Client Groups				ე 0 0
	Hire an Employee	දුරු	o*	M∕r		i∰.	
				Person Management		Time Management	000
	Change Assignment	FOR	°@	An	<u>₽</u> ,		P 0
000 0		Compensation	Goals	Performance	Workforce Structures	Payroll	00
	🕎 Transfer						
	Checklist Templates	Data Exchange	Safety Incidents	+			7
Second Street	Act as Proxy Manager						
ALL REPORTS							
	Things to Finish						•

Next, click **Performance**

= vision	Q Searc	h for people and actions							ı 🕼 [
-0.0.0.0	Good morning, H	R Specialist	(Curtis Fe	itty)!						0
0 0 0 0 0 0 0 0 ⁰ 0 0	Me My Team My Client Groups Tools Configuration My Reporting									0
	QUICK ACTIONS	APPS								ь 0 ₁ -
	Hire an Employee	දීග්	o*	M∕r		Ē				
				New Person Person Management	LJ CLEY Absences Time Management	Time Management			0 0	
0 0 0 0 0 0 0 0	👷 Change Assignment									0
	ମ୍ମି Change Manager	1 0%	<u>2</u> 0	ál	67				0	
00000	My Termination	Compensation	Goals	Hertormance	Workforce Structures	Payroll				¢
0	Checklist Templates	议	5		Click Pe	erformance				
	مراس مراس مراس مراس مراس مراس مراس مراس	Data Exchange	Data Exchange Safety Incidents							
STATE OF STATE	Show More									
	Things to Finish									

Click Process Mass Actions for Performance Documents

vision		
Performance		
D.	What do you want to do or manage?	
	Formate for starter	
	2401(1)/(10)/(10)/(10)/(10)/(10)/(10)/(10)	
	Administration	
	Administration	
	Desformance Desimante	
	Perdinance bocuments	
	Participant Feedback	
	Reformance Eligibility	
	Process Mass Actions for Performance Documents	
	Process mass actions for Performance Documents	
	Click Process Mass Actions for Performance Documents	
	Setup Maintenance	
	Review Periods	
	Questions	
	Questionnaire Templates	

Click Add

	Submitted Mass Action P	rocesses + Add	
Q	Search process name	Hide Filters Submission Date Today X Completion Date All X	
	Filters Reset 🔅	Refresh Sort By Submission Date - Latest to Oldest 🗸	
	Expand All Collapse All	~	
	Submission Date Clear	No results found.	
	All	Check your search criteria.	
	Today		
	Last 7 Days		
	Range (specify)		
	 Completion Date Clear 		
	All		
	Today		
	Last 30 Dave		
	Range (specify)		
	Range (specify)		

Select the ${\bf Task}$ we wish to mass process

Submitted Mass Action P	rocesses			+ Add Cancel Performance Documents
Search process name Q Filters Reset Expand All Collapse All	Hide Filters Submission Date Today ×	Completion Date All X	Sort By Submission Date - Latest t	Complete Performance Documents Create Performance Documents Delete Performance Documents Mass Print Performance Documents
Submission Date		No results found. Check your search orderia.	Select Task	Change Current Task Change Task Due Dates Update Model Profile Competency Sections
 ∧ Completion Date Clear All Today Last 7 Days Last 30 Days Range (specify) 				

Enter the **Details**

*Review Period Basiners Unit 2023 Annual Cycle *Performance Document Department 2023 Annual Subuation > Current Tak Select a value Worker Self Evaluation Select a value *Morger Self Evaluation Select a value *Morger Self Evaluation Select a value *Manager Self Evaluation Select a value	Packerw Packel Batiass Mit 2023 Annual Cycle *Performance Document Dapartment 2023 Annual Cycluston 2024 Annual Cycluston 2025 Annual Cycluston 2026 Annual Cycluston 2027 Annual Cycluston 2028 Annual Cycluston 2029 Annual Cycluston 2020 Annual Cycluston	Details	Enter the in	formation below	
2023 Annual Cycle Pedral US Business Unit *Performance Document Department 2023 Annual Evaluation Select a value Worker Self Evaluation Select a value *New Corrent Task Manager Manager Valuation Select a value *New Corrent Task Engloyee Manager Valuation Select a value Manager Valuation Select a value *New Corrent Task Select a value Manager Valuation Select a value *New Corrent Task Select a value	2023 Annual Cycle Federal US Bunioes Unith *Reformance Document Dapartment 2023 Annual Gvaluation Select a value Current Tak Manoger Select a value *New Current Tak Englope Manoger Folduation of Workers Select a value Action Select a value Tak conver request Select a value	*Review Period		Business Unit	
*Performance Document Department 2023 Annual Evaluation Select avalue Current Tak Manager Worker Self Evaluation Select avalue *New Current Tak Select avalue *New Current Tak Select avalue Manager Evaluation of Workers Select avalue Rean Select avalue Task conser request Select avalue	*Performance Document Department 2023 Annual Evaluation Image Worker Self Evaluation Image Worker Self Evaluation Select a value *New Current Task Imployee Manager Evaluation of Workers Select a value Reason Assignment Status Task conner request Select a value	2023 Annual Cycle	~	Federal US Business Unit 🗸	
Image: Self a value Image: Self a value	2023 Annual Evaluation 2023 Annual Evaluation Current Tak Select a value Worker Self Evaluation "New Current Tak Endoyee Manager Evaluation of Workers Descent Endoyee Etak owner request Select a value	*Performance Document		Denartment	
Manager Worker Sdif-Foshaation Manager *New Curren Task Select a value > *New Curren Task Employee Manager Evaluation of Workers Select a value > Reason Asagromert Sature Task owner request Select a value >	Current Task Manager Workers Soft-Evaluation Select a value > *New Current Task Employee Manager Evaluation of Workers Select a value > Reason Assignment Status Task coverser request Select a value >	2023 Annual Evaluation	~	Select a value	
Worker self textuation Select a value *New Current Task Engloyee Manager Evaluation of Workers Select a value Reacon Assignment Status Task owner request Select a value	Worker Self-Evaluation Select a value *New Curren Task Employee Manager Evaluation of Workers Select a value Reason Assignment Status Task conser request Select a value	Current Task		Manager	
*New Current Task Employee Manager Evaluation of Workers Select a value > Reason Assignment Status Task corner request Select a value >	*New Current Task Employee Manager Evaluation of Workers ✓ Select a value ✓ Resson Assignment Status Task corner request ✓ Select a value ✓	Worker Self-Evaluation	~	Select a value	
Interfact Look Enclose Manage Evaluation of Workers	Interference Constrained Manager Enaluation of Workers Select a value Reason Select a value Task owner request Select a value	Tallan Connet Tall			
Reason Assignment Status Task count request Select a value	Reson Assignment Status Task owner request Select a value	Manager Evaluation of Workers	~	Select a value	
Network Assignment Satury Task owner request V Select a value V	Keton Assignment Satus Task owner request v				
International subsets		Task owner request	~	Assignment status	
				JUNCL II FURDE	

Click Submit

cess Mass Change	Current Task		Preview Submit Cance
	Details		
	"Review Period	Business Unit	
6	2023 Annual Cycle V	Federal US Business Unit	×
	*Performance Document	Department	
	2023 Annual Evaluation V	Select a value	×
	Current Task	Manager	
	Worker Self-Evaluation V	Select a value	×
	*New Current Task	Employee	
	Manager Evaluation of Workers	Select a value	×
	Reason	Assignment Status	
	Task owner request	Select a value	 Image: A set of the set of the

ſ

Thank you for reviewing and using our guide; we hope you have found it helpful. If you have any questions on the content included in this guide, please contact our Training & Learning team at learn@camptratech.com

Version	Revision		
History	Date	Author	Changes
Version 1.0		Megan Ketter	Initial Version