Running the ePerformance Summary and Detail Status Reports Job Aid



## 1.0 SCOPE

- 1.1 This document describes how to run the Performance Summary and Performance Detail reports (queries) in PeopleSoft.
- 1.2 The reports described herein should be run by the School Principal or Department Manager as they will show the status of the ePerformance documents desired for the entire department. First line administrators, such as Assistant Principals, have other means of getting the reported data for themselves (their current documents will reflect their pending performance documents) and they will most likely not have the required system security to view anything other than their own data.

#### 2.0 PROCEDURE

2.1 This job aid assumes that you are logged in to the PeopleSoft Human Resources system and are navigating from the Human Resources Main Menu (as shown below).



2.2 Click on the Reporting Tools menu option from the Human Resources main menu.

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ORACLE	
Revortes Main Menu > Reporting Tools	
Reporting Tools	
Reporting Tools	
Run, create, and manage queries and nVision reports	
Reverw report list.	Stream Financial formation uning visual representations of your PS database.

2.3 Click the <u>Query Viewer</u> link.

ORACLE	
Favorites Main Menu > Reporting Tools > Query	> Query Viewer
Query Viewer	
Enter any information you have and click Search. Leave fie	elds blank for a list of all values.
*Search By: Query Name 💌 begins with	rc_perf
Search Advanced Search	

2.4 Enter "rc\_perf" in the *begins with* text box in the *Search By* line and click on the **Search** button.

ORACLE								
Favorites Main Menu > Reporting Tools > Query > Query Viewer								
Query Viewer								
Enter any information you have and click Search. Leave fields blank for a list of all values.								
*Search By: Query Name 💌 begins with RC_PERF								
Search Advanced Search								
Search Results								
*Folder View: All Folders								
Query Customize   Find   View All   🔤   🛗 First 🚺 1-2 of 2 🖸 Last								
Query Name	Description	<u>Owner</u>	Folder	<u>Run to</u> <u>HTML</u>	<u>Run to</u> Excel	<u>Run to</u> <u>XML</u>	Schedule	Add to Favorites
RC_PERF_DOC_DETAIL	Performance Detail - Due Date	Public		HTML	Excel	<u>XML</u>	Schedule	Favorite
RC_PERF_DOC_SUMMARY	Performance Summary - Due Date	Public		HTML	Excel	XML	Schedule	Favorite

- 2.5 The two ePerformance Performance Status reports summary and detail will appear, as shown above.
- 2.6 *Helpful Hint:* if you think these are reports that you will want to run on a regular basis, click on the Favorite link to add them to your favorites. Doing so will enable you to skip steps 2.4 and 2.5 and select the query right from your favorites. Then, you won't have to remember the name of the query or where you put this documentation!

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- 2.7 We'll start with the **Performance Summary** report. Click on the <u>HTML</u> link to run the report and have the results displayed on your screen. After viewing the results on the screen, you can click on the <u>Excel\_Spreadsheet</u> link if you need to download the results to an Excel spreadsheet. A couple of notes about your other choices:
  - If you want to run the report and have the results downloaded to an Excel spreadsheet, click on the Excel link. This is particularly useful if you want to sort or filter the reported data by some criteria other than the way this report is structured.
  - This report can be scheduled to run at a future time or on a regular basis and delivered to your e-mail upon completion. Scheduling a report is beyond the scope of this job aid.

RC_PERF_DOC_SUMMARY - Performance Summary - Due Date	_
Period End Date 06/30/2013	-
Performance Document Status	Count

- 2.8 **Note:** these queries are based upon the **ending date** of a particular performance document and can be used to monitor the status of Formal Observations or Annual Professional Performance Reviews (APPR's). For the 2012-2013 school year, the performance documents and their respective system end dates are as follows (note: these are system dates and they may not correlate exactly with the various bargaining unit contractual dates):
  - 1<sup>st</sup> Formal Observation for Non-Tenured Teachers 11/30/2012
  - RAP Non-Tenured TA Formal Observation 01/30/2013
  - Peer Evaluator Formal Observation 04/29/2013
  - Formal Observation (Tenured Teachers #1; Non-Tenured 2<sup>nd</sup> Formal) 04/30/2013
  - RAP Tenured TA Formal Observation 5/15/2013
  - Teachers, Teaching Assistants, Paraprofessionals, BENTE Civil Service, ASAR Civil Service Annual Evaluations 06/30/2013
- 2.9 Enter the ending date of the desired evaluation document. If you don't select the date from the calendar icon, the date will need to be entered as "06/30/2013" or "06302013" (for the 12-13 school year annual evaluations). Click the Enter key on your keyboard to run the report.

RC\_PERF\_DOC\_SUMMARY - Performance Summary - Due Date

Period E View F	nd Date: 06/30/2013 🛐 Results						
Download results in : Excel SpreadSheet CSV Text File XML File (1 kb)							
View All	View All First 4 1-6 of 6 Fi Li						
	Performance Document Status	Count					
1	1 - In Progress	4185					
2	2 - Available for Review	515					
3	3 - Review Held	82					
4	4 - Acknowledged	80					
5	5 - Complete	616					

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2.10 This example shows running the report to HTML, so a new window will open and the completed report will appear on your screen. The report will show all of the ePerformance Document progress statuses that are applicable (In Progress, Available for Review, Review Held, Acknowledged, Complete). If there are no performance document in a particular status, that line will be excluded from the report. For example, if all performance documents were complete, only the "5 – Complete" line would appear on the report. In the example above, the data shown is for the entire District. When the query is run by the principal or department manager, only the data for their school or department will be shown.

While the report was run to an Excel spreadsheet, it can be downloaded, if desired, by clicking on the Excel Spreadsheet link on the page.

2.11 **Running the Performance Detail report.** Click on the HTML link to run the report and have the results displayed on your screen. The same selection criteria (end date) as described above applies to the detail report. See step 2.8 for further reference.

Perio Vie	od End Date w Results	e: 06/30/2013	3							
Do	wnload re	esults in : <u>Ex</u>	cel SpreadSheet C	SV Text File	XML File (	2399 kb)			First	4 400 -55470 - 1
/iew		Last	First Name	Per Beg Dt	Per End Dt	Doc Type	Template ID	Manager ID	Name	Status
1				07/01/2012	06/30/2013	ASAR	2ASARCUR	100.000	Manageria - Barrison	In Progress
2	000100		Transition	07/01/2012	06/30/2013	CVLSRVCE	BENTE	101100	Winnakiline	Completed
3	-007786-1	Trends and		07/01/2012	06/30/2013	CVLSRVCE	BENTE	101100	Weiners & Weiner	Available for Revie
Ļ.	107300		(Frank)	07/01/2012	06/30/2013	RTA_2012	RTA60	101100	Weinersteinen	In Progress
5	100000		Transferrar Tolli	07/01/2012	06/30/2013	RTA_2012	RTA60	101100	Weinstein Weinstein	In Progress
	465688	Runnam		07/01/2012	06/30/2013	RTA_2012	RTA60	101180	Weinersteinen	In Progress
,	414474			07/01/2012	06/30/2013	RTA_2012	RTA60	101100	Weinig / Bring	Available for Revie
;	400404	ALC: NO.		07/01/2012	06/30/2013	RTA_2012	RTA60	101100	Winnigition	Completed
)	-0000851	ALCONG.	Tayline .	07/01/2012	06/30/2013	RTA_2012	RTA60	101100	Witness History	Available for Revie
0	-889148-7			07/01/2012	06/30/2013	RTA_2012	RTA60	101100	Winnightions	Available for Revie
1	-001400-1			07/01/2012	06/30/2013	RTA_2012	RTA60	101100	Winnig / Birms	In Progress
2	0000001			07/01/2012	06/30/2013	RTA_2012	RTA60	101100	Winnisition	Available for Revie
3	-808577	1100000000		07/01/2012	06/30/2013	RTA_2012	RTA60	101180	Witness Philippe	Available for Revie
4	-2008711	New York Company		07/01/2012	06/30/2013	RTA_2012	RTA60	101100	Winsia Mina	In Progress
15	110-10-	THE OWNER AND ADDRESS		07/01/2012	06/30/2013	RTA_2012	RTA60	461746-	Human Hann	In Progress
6	100710-1	10000100	Section 14	07/01/2012	06/30/2013	RTA_2012	RTA60	461146-	Human Trees	In Progress
17	-001100-1			07/01/2012	06/30/2013	RTA_2012	RTA60	444144	Human Hann	In Progress
8		in a grante	(Million)	07/01/2012	06/30/2013	RTA_2012	RTA60	101746-	Harris Trees	In Progress
19	-0003371	Taxat		07/01/2012	06/30/2013	RTA_2012	RTA60	444144	Harrison totall	In Progress

2.12 As with the summary report, the detail report can be downloaded if desired for further sorting and/or filtering. In the example detail report above, only the first 19 rows of data are shown and the individual names and employee ID's have been purposefully "blurred".

\*\*\* End of Job Aid \*\*\*

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