

1.0 SCOPE

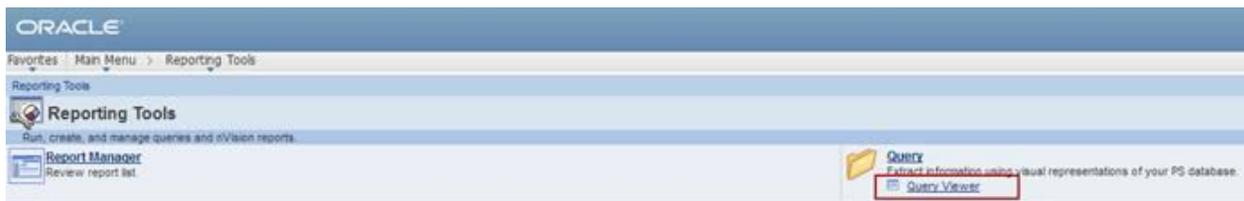
- 1.1 This document describes how to run the Performance Summary and Performance Detail reports (queries) in PeopleSoft.
- 1.2 The reports described herein should be run by the School Principal or Department Manager as they will show the status of the ePerformance documents desired for the entire department. 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

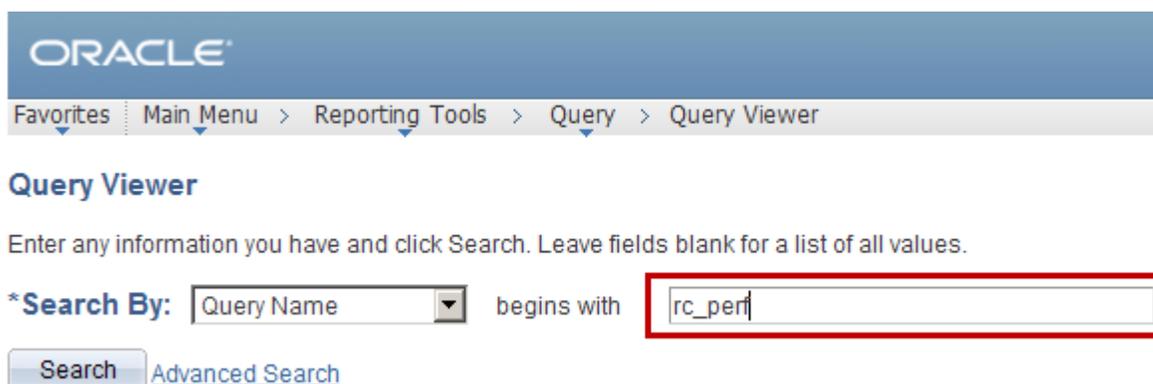
- 2.1 This job aid assumes that you are logged in to the PeopleSoft Human Resources system and are navigating from the Human Resources Main Menu (as shown below).



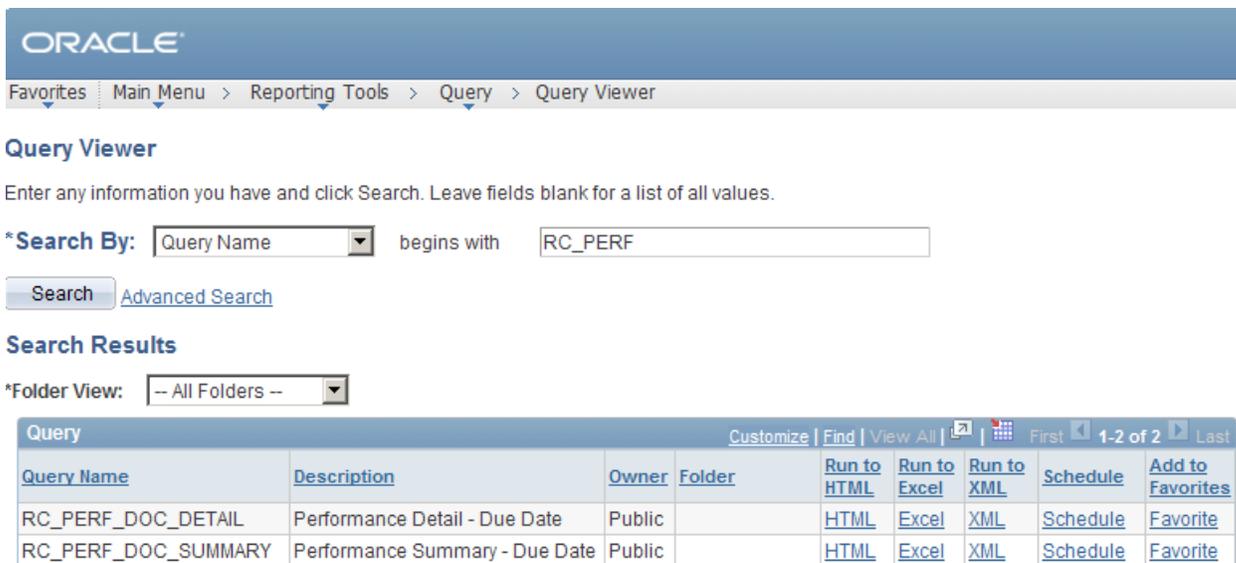
- 2.2 Click on the Reporting Tools menu option from the Human Resources main menu.



2.3 Click the [Query Viewer](#) link.



2.4 Enter “rc_perf” in the *begins with* text box in the *Search By* line and click on the **Search** button.



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!



2.7 We'll start with the **Performance Summary** report. Click on the [HTML](#) 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 [Excel Spreadsheet](#) 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:

[View Results](#)

	Performance Document Status	Count
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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):

- 1st 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 – 2nd 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 End Date:

[View Results](#)

Download results in : [Excel SpreadSheet](#) [CSV Text File](#) [XML File \(1 kb\)](#)

[View All](#) First 1-6 of 6 Last

	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

ROCHESTER CITY SCHOOL DISTRICT

Running the ePerformance Summary and Detail Status Reports Job Aid



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.

RC_PERF_DOC_DETAIL - Performance Detail - Due Date

Period End Date:

[View Results](#)

Download results in : [Excel SpreadSheet](#) [CSV Text File](#) [XML File](#) (2399 kb)

[View All](#)

First Last

	ID	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			In Progress
2				07/01/2012	06/30/2013	CVLSRVCE	BENTE			Completed
3				07/01/2012	06/30/2013	CVLSRVCE	BENTE			Available for Review
4				07/01/2012	06/30/2013	RTA_2012	RTA60			In Progress
5				07/01/2012	06/30/2013	RTA_2012	RTA60			In Progress
6				07/01/2012	06/30/2013	RTA_2012	RTA60			In Progress
7				07/01/2012	06/30/2013	RTA_2012	RTA60			Available for Review
8				07/01/2012	06/30/2013	RTA_2012	RTA60			Completed
9				07/01/2012	06/30/2013	RTA_2012	RTA60			Available for Review
10				07/01/2012	06/30/2013	RTA_2012	RTA60			Available for Review
11				07/01/2012	06/30/2013	RTA_2012	RTA60			In Progress
12				07/01/2012	06/30/2013	RTA_2012	RTA60			Available for Review
13				07/01/2012	06/30/2013	RTA_2012	RTA60			Available for Review
14				07/01/2012	06/30/2013	RTA_2012	RTA60			In Progress
15				07/01/2012	06/30/2013	RTA_2012	RTA60			In Progress
16				07/01/2012	06/30/2013	RTA_2012	RTA60			In Progress
17				07/01/2012	06/30/2013	RTA_2012	RTA60			In Progress
18				07/01/2012	06/30/2013	RTA_2012	RTA60			In Progress
19				07/01/2012	06/30/2013	RTA_2012	RTA60			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 ***