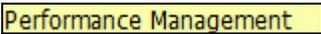




TM-01.1 CABQ - Create Performance Document

Step	Action
1.	Click the Main Menu item to begin navigation. 
2.	Click the Manager Self Service menu.
3.	Click the Manager Dashboard menu.
4.	Locate the employee that needs a performance documented in the Direct Line Reports pagelet. Click the Actions link. 
5.	Click the Performance Management menu. 
6.	Click the Create Performance Document menu. 
7.	Click in the Period Begin Date field. 
8.	Enter the desired information into the Period Begin Date field. This will be the employee's work anniversary date. For this training, enter " 07/25/2016 ".
9.	Click in the Period End Date field. 
10.	Enter the desired information into the Period End Date field. Enter " 07/24/2017 ".
11.	Click the Document Type list. 
12.	Choose the appropriate Document Type for the employee. Click the Basic Annual Review list item. 
13.	This is a new document and will not be a clone of a prior document.
14.	Choose the appropriate Template from the drop-down list. For this training, click the City-Wide Annual Review list item. 



Step	Action
15.	Click the Create Documents button. 
16.	The status of the process will be displayed. A successful process will display the following: Successful Creation? Yes Status - Document created successfully.
17.	To access the new performance document: Click the Current Documents link. 
18.	The Current Documents link will display a list of all direct reports Performance Documents . Click on the Name link to access the Performance Document.
19.	Congratulations! You have successfully completed the Create Performance Document course. End of Procedure.