

## REVIEWING MANAGER HIERARCHY REVIEW OF PERFORMANCE DOCUMENTS

Reviewing Managers or other leaders in an agency can view the performance document of employees down through their hierarchy using the View Only Documents function.

**Step 1: Reviewing Managers should go to Manager Self Service >> Performance Management >> View Only Document.**

**Step 2: Once at this screen, Reviewing Managers should select the effective date for determining their direct reports and click on Continue.**

**ORACLE** Home

**Menu**

- Job and Personal Information
- Compensation and Stock
- Learning and Development
- Performance Management
  - Performance Documents
    - Create Documents
    - Current Documents
    - Historical Documents
    - View-Only Documents**
    - Mass Approval
    - Approve Documents
    - View Approval Status
    - Manager Review Rating Report
    - Maintain Performance Notes

**View-Only Documents**  
View documents for one of your employees.

**Instructions**

Follow this 3-step process to view documents for one of your employees:

1. Enter the date used to find the employees that report to you. You will be able to view documents for only those employees that report to you as of this date.
2. Select the employee you would like to view documents for.
3. Select the document type hyperlink for the document you would like to view details for.

**Enter the as of date**

Enter the effective date for determining your employees.

**Step 3: The list of the Reviewing Manager's direct reports will display. To view people farther down in the hierarchy, the Reviewing Manager would click on the hierarchy icon next to the appropriate direct report.**

**ORACLE** Home

**Menu**

- My Favorites
- Self Service
- Manager Self Service
  - Time Management
  - Job and Personal Information
  - Compensation and Stock
  - Learning and Development
  - Performance Management
    - Performance Documents
      - Create Documents
      - Current Documents
      - Historical Documents
      - View-Only Documents**
      - Mass Approval
      - Approve Documents
      - View Approval Status
      - Manager Review Rating Report
      - Maintain Performance Notes
      - Review Transactions
    - Agency Security
    - Workforce Administration
    - Time and Labor
    - Workforce Development
    - Organizational Development
    - Set Up HRMS
    - Enterprise Components
    - Worklist
    - Reporting Tools
    - PeopleTools
      - Change My Password
      - My Personalizations
      - My System Profile
      - My Dictionary

**View-Only Documents**  
Select the employee to view documents for.

**Instructions**

Select the employee you would like to view documents for.

Once you have finished select **Continue** to enter the document details.

[Return to Previous Page](#)

**Select Employees**

Reports To:  As Of: 02/05/2013

| Select Employee |         |           |                                |                           |  |
|-----------------|---------|-----------|--------------------------------|---------------------------|--|
| Name            | Empl ID | HR Status | Job Code Description           | Department                |  |
|                 |         | Active    | MG2: Human Resources           | HRA - Policy & Compliance |  |
|                 |         | Active    | TS:Business Op Generalist (AL) | HRA - Administration      |  |
|                 |         | Active    | MG2: Business Operations       | HRA - Benefits            |  |
|                 |         | Active    | MG2: Business Operations       | HRA - Enterprise HR       |  |

**Step 4: The list of that manager's direct reports will display. To view people farther down in the hierarchy, the Reviewing Manager would again click on the hierarchy icon next to the appropriate direct report.**

**View-Only Documents**  
Select the employee to view documents for.

**Instructions**  
Select the employee you would like to view documents for.  
Once you have finished select *Continue* to enter the document details.

[Return to Previous Page](#)

**Select Employees**  
Reports To: [ ] As Of: 02/05/2013  
[Continue](#)

| Name                      | Empl ID | HR Status | Job Code Description     | Department          |     |
|---------------------------|---------|-----------|--------------------------|---------------------|-----|
| Empty Position (00092332) |         |           | MG1: Business Operations | HRA - Enterprise HR |     |
| [ ]                       |         | Active    | MG1:HR Program Manager   | HRA - Enterprise HR | [ ] |
| [ ]                       |         | Active    | MG1:HR Program Manager   | HRA - Enterprise HR | [ ] |

[Continue](#)

**Step 5: The list of that manager's direct reports will display. The Reviewing Manager can continue to drill down through the hierarchy as needed. When the Reviewing Manager sees the name of the performance document he wants to review, he should click next to that person's name and click continue.**

**View-Only Documents**  
Select the employee to view documents for.

**Instructions**  
Select the employee you would like to view documents for.  
Once you have finished select *Continue* to enter the document details.

[Return to Previous Page](#)

**Select Employees**  
Reports To: [ ] As Of: 02/05/2013  
[Continue](#)

| Name | Empl ID | HR Status | Job Code Description        | Department          |     |
|------|---------|-----------|-----------------------------|---------------------|-----|
| [ ]  |         | Active    | PS: Hum Res Specialist (AL) | HRA - Enterprise HR |     |
| [ ]  |         | Active    | PS: Hum Res Specialist (EL) | HRA - Enterprise HR | [ ] |

[Continue](#)

**Step 6: The list of all performance documents for that employee will display. The Reviewing Manager can click on the document of the cycle he wants to review.**

**Note:** Document may be viewed only. It may not be modified.

**View Performance Documents**

Listed below are all the performance documents for the direct report you selected.

| Employee | Mid Initial | Document Type                             | Begin Date | End Date   | Job Title                   | Status      | Manager | Middle Initial | Rating |
|----------|-------------|---|------------|------------|-----------------------------|-------------|---------|----------------|--------|
|          |             | <a href="#">Annual Performance Review</a> | 07/01/2014 | 06/30/2015 | PS: Hum Res Specialist (EL) | In Progress |         |                |        |
|          |             | <a href="#">Annual Performance Review</a> | 07/01/2012 | 06/30/2013 | PS: Hum Res Specialist (EL) | In Progress |         |                |        |
|          |             | <a href="#">Annual Performance Review</a> | 07/01/2011 | 06/30/2012 | PS: Hum Res Specialist (EL) | Completed   |         |                |        |
|          |             | <a href="#">Annual Performance Review</a> | 07/01/2010 | 06/30/2011 | PS: Hum Res Specialist (EL) | Completed   |         |                |        |
|          |             | <a href="#">Annual Performance Review</a> | 07/01/2009 | 06/30/2010 | PS: Hum Res Specialist (EL) | Completed   |         |                |        |
|          |             | <a href="#">Annual Performance Review</a> | 07/01/2008 | 06/30/2009 | PS: Hum Res Specialist (EL) | In Progress |         |                |        |
|          |             | <a href="#">Annual Performance Review</a> | 07/01/2008 | 06/30/2009 | SS: Clerk (EL)              | In Progress |         |                |        |

[Return to Select Employees](#)