Evaluation Alert System (EASY)
Operation & User Manual

Los Angeles Community College District

Evaluation Alert System (EASY)
Operation & User Manual

Manager Services
Manage your team data and manage your budget. View all data associated with the employees in your team and perform services on behalf of these employees. Approve team time sheet data, write performance appraisals, monitor employee assets and equipment, initiate personnel change requests and view and print reports.

Quick Links
- Time Sheet Approval (New**)
- Team Absence Calendar (New**)
- Employee Review
- PCH
- Evaluation Alert System

Attendance Detail
Manager Desktop
Reporting
My Budget Reports

Prepared by:
Revision 4.0 Andy Duran
9/5/17
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1.0 Business Objectives

Performance Evaluation Alert System (EASY) is a web application with workflow to remind Managers to complete the evaluation documents for their direct reports. The EASY application includes reminders for Classified, Faculty and Executive Staff with the ability to attach digital performance evaluations via a Managers Performance Appraisal Workbench for processing, and includes management reporting for completion and aging status.

Note: This does not include Student Workers, Unclassified or Elected Members of the Board of Trustees.

The evaluation for an employee is due based upon Collective Bargaining agreements and Board Rules as follows:

<table>
<thead>
<tr>
<th>EMPLOYEE GROUP</th>
<th>BARGAINING UNIT</th>
<th>PSA’S:</th>
<th>TIMELINE</th>
</tr>
</thead>
<tbody>
<tr>
<td>Academic Vice Presidents</td>
<td>AM</td>
<td>Annually (May 1 - June 30), comprehensive every three years</td>
<td></td>
</tr>
<tr>
<td>Classified Management</td>
<td>CM</td>
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<td>Annually (July 1)</td>
</tr>
<tr>
<td>Classified Vice Presidents</td>
<td>CM</td>
<td>Annually (May 1 - June 30)</td>
<td></td>
</tr>
<tr>
<td>Clerical/Technical</td>
<td>AFST Staff Guild Unit 1 Local 1321A</td>
<td>CP / CT</td>
<td>Annually (birth month)</td>
</tr>
<tr>
<td>Confidential and Unclaimed</td>
<td>CN / CU</td>
<td>Annually (May 1 - June 30)</td>
<td></td>
</tr>
<tr>
<td>Crafts</td>
<td>Building and Construction Trades Council – Unit 3</td>
<td>CR</td>
<td>Annually (birth month)</td>
</tr>
<tr>
<td>Academic Supervisors</td>
<td>Teamsters Local 911</td>
<td>AS</td>
<td>Annually (anniversary date)</td>
</tr>
<tr>
<td>Faculty</td>
<td>Faculty Guild Local 1521</td>
<td>FR / FA</td>
<td>Probability Faculty: Every fall semester until Probation is completed. Tenured Faculty: Every 3 academic years in the fall or spring semester, alternating between basic and comprehensive evaluation. Adjunct and Temporary Faculty: Before the completion of the second semester and every six semesters thereafter.</td>
</tr>
<tr>
<td>Maintenance &amp; Operations</td>
<td>Schools Employees Union Local 99</td>
<td>OP</td>
<td>Annually (birth month)</td>
</tr>
</tbody>
</table>

1 The term “Manager” refers to the person in the organizational structure to whom an employee reports as identified in the LACCD SAP HR system. In some cases, the manager may want the “Supervisor”, to whom the employee directly reports, to complete the appraisal. Changes to the routing of evaluations are maintained within Organizational Management. Contact your College HR Department for changes. For Faculty, the workflow for adjuncts and temporary faculty will be sent to the Dept. Chair. The workflow for Probationary and Tenured faculty will be sent to the Dean or next higher manager.

2 The due dates for Classified Management, Confidential, Unclaimed and Classified Vice Presidents was corrected to be May 1 - June 30 based upon Personnel Commission Rule 702.
2.0 OVERVIEW

The system is designed with the following major features.

➢ Managers are identified for all employees (except Student & Unclassified workers, and the elected members of the Board).

➢ Managers are reminded of the appraisal due dates starting 60 and 30 days before the evaluation due date and twice after the evaluation is due. Automatic reminders to Managers are sent via outlook to inform them that performance evaluations are due.

➢ Appraisal (evaluation) Workbench Completion Process.

➢ Managers updating the Status of the Performance Evaluation document as completed and attaching a digital copy of the evaluation to the SAP HR system eliminating the need to mail hard copies of the documents to HR.

➢ Ability to search and view previous digital copies by department, business area (college) and employee by year.

➢ Analytical reports identifying Business Area (College), Department, Managers performance evaluation completion rates, aging, and overall status.

➢ Work Item for processing in Outlook/ UWL (Portal)/ Inbox (SAP GUI)

➢ Workflows with actionable work items for direct access to the Appraisal workbench and for notifying the local HR representative of any organizational changes that affect the identification of the appropriate performance evaluation manager.

➢ HR Review and Quality Assurance Audit built in to notify the performance evaluation manager that the evaluation has been reviewed by HR for appropriate attachment and for HR to monitor and track status and completion rates.

➢ Ability for evaluation mangers to send ESC HR message and comments directly within the Evaluation Appraisal Workbench.

➢ Ability for ESC HR to send the performance evaluation managers messages directly within the HR Quality Assurance Performance Evaluation Workbench.

➢ Access for Managers to view and download evaluation form templates from Manager Self Services.

➢ Ability to set-up departmental delegates who can upload the documents for a manager.
3.0 **EMAIL ALERTS, UWL (PORTAL) / INBOX (SAP GUI)**

The notification program runs every day to generate alerts for performance evaluation reminders. Work items & emails are sent to the SAP ERP Business Workplace (Inbox) of the Manager and to the Inbox of Outlook. The same work items can also be accessed via the Work/Inbox of the LACCD Portal and the Manager Self Service Appraisal (evaluation) workbench.

**EMAIL ALERT**

Typical reminder email note:

From: HR : Workflow Agent [mailto:do-not-respond@laccd.edu]
Sent: Monday, February 20, 2017 9:57 AM
To: Duran, Andrew <DuranA@email.laccd.edu>
Subject: Reminder: Performance evaluation is due for -002 E

Reminder: Performance Evaluation is due for the following Employee

Employee Name:  Mr. Walt Disney
Employee No.: 00000000
Department:  IT - SAP/ERP
Title:     Chairman of the Board and Chief Executive Officer

You may use the following link to complete the Evaluation form
http://www.laccd.edu/FacultyStaff/forms/Documents/FORM-PE_CM.PDF
https://sapprd.laccd.edu:8080/sap/bc/nwbc/Z1_EVAL_ALERT_HELP

Please select the attached link (url to the Appraisal Workbench) and attach the completed performance evaluation
HTTPS://PORTAL.LACCD.EDU:50001/irj/portal/easy

If you feel that you have received this e-mail in error, please log on to the portal and select [Forward to SPOC] through your Universal Work List (Work tab).

**EVALUATION SYSTEM (EASY)**

The workflow sends the email at intervals of 60 and 30 days before due date; 14 and 28 days after due date.

For Faculty, a single email will be sent at each interval reminding managers that appraisals are due.
INBOX SAP GUI
In the SAP GUI ERP Business Workplace, the performance evaluation alerts appear as shown below:

UWL PORTAL
In the LACCD SAP Portal, the performance evaluation work item looks like the following located in the Universal Work List (aka UWL). As in SAP ERP Business Workplace, the manager must click the work item to open the web application and update the status of the evaluation form.
4.0 WORKFLOW

The workflow follows the current HR Organizational structure. The employees with “hats” are recognized as Managers and the alerts are sent to them. If however, the Manager feels that the appraisal alert is not relevant to him/her, it can be forwarded to the designated HR Representative at his/her location. The alert could then be forwarded to the appropriate Manager. All the Managers are expected to have valid portal access and active email addresses (in SAP).

For Faculty, the workflow for adjuncts and temporary faculty will be sent to the Department Chair. The workflow for Probationary and Tenured faculty will be sent to the Dean or next higher manager.

If you believe there is a problem with workflow, please speak with your campus SPOC to check the organizational structure.
5.0 Accessing Performance Evaluations and the Performance Evaluation Workbench

When the Manager receives the work item via email (outlook) and clicks the URL – link to the Evaluation Workbench and after signing in, it will access the LACCD SAP Portal and display the page as shown below. After selecting the execute icon, the performance evaluation workbench is displayed.

Note: Once the evaluation form is uploaded, the workflow closes and stops sending the reminder email.

The Performance Evaluation workbench can be accessed using several methods.

The easiest method is identified above via the alert reminder email.

If the Manager thinks that the employee forms are not under his purview, he/she may click the button “Forward to Campus HR Representative”. The Manager must add some comments to the work item giving reasons for forwarding.

Once a work item is forwarded to the HR Representative, the Representative can forward this to the right Manager. The comments from the earlier Manager may help determine the next Manager.

When the Manager clicks on “Forward to Campus HR Representative”, the Manager can search a person to be forwarded by entering Last or First Name and clicking on “Search for User Name”.

From the list searched, select the person to whom you want to forward and click on “Forward to”.
INBOX SAP GUI

In the SAP GUI ERP Business Workplace, the performance evaluation alerts appear as shown below:

You can double click on a work item. When the screen below appears, click on “URL to Appraisal Workbench”.

Please update the status of Performance Evaluation Form for the following employee. If the employee does not report to you, please click the button “Forward to SPOC” to send to the SPOC at your location.

Please log into Portal to access Appraisal Workbench and attach the completed performance evaluations.

Name
Department Name
PSA/EG/ESG
Designation

Note: Comments more than 250 characters would be truncated automatically if

URL to Appraisal Workbench  Forward to College HR Representative
**UWL PORTAL**

Another way to access the Evaluation Workbench is via the LACCD SAP Portal Manager Self Service link.

In the LACCD SAP Portal, the performance evaluation work item looks like the following located in the Universal Work List (AKA UWL). As in SAP ERP Business Workplace, the manager must click the work item to open the web application and update the status of the evaluation form.

Access via the LACCD SAP Portal Manager Self Services (MSS) – Evaluation Alert System or via Managers Desktop

Appraisal Workbench with full view and access to reports
6.0 MANAGER APPRAISAL WORKBENCH

The Appraisal Workbench is used to load evaluation documents and mark it as completed. The Workbench will also show you an overall view of completed appraisals and appraisals which are due. You can use this workbench to upload evaluation documents. A manager can choose to include only their direct reports or also indirect reports by clicking on the button at the bottom of the selection screen. (To access organizational units which are not under your area of responsibility, you will need to be set-up as a delegate.)

The selection screen and the output for the Workbench looks as follows. Enter the evaluation year and click execute.

Appraisals which are due will appear. Click on the attach icon to upload a PDF version of your appraisal. You can use the icon to load additional attachments too. A date will then appear in the “Last Appraisal Date” column and a check mark will show in the Appraisal Completed column.

Note: Always load PDF versions of the evaluation and other documentation.
**Steps to Attach Evaluations from Appraisal Workbench:**

- Click on “Attach” button to proceed with document attachments
- Select Year
- Select the document from Desktop (PDF Format)
- Confirmation message “Attachment successfully attached for the selected Employee”

A message will appear when you have successfully uploaded an appraisal document.

You may use the other icons to view or delete the document prior to HR review. Once HR reviews and approves the attachment the “QA done by HR” will be checked.

**Note:** Once HR has reviewed the document, the evaluation document can no longer be deleted, and a check mark will appear in the “QA done by HR” column. See graphic above.
ICON Legend

<table>
<thead>
<tr>
<th>ICON</th>
<th>LABEL</th>
<th>FUNCTION</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="image" alt="Attach Icon" /></td>
<td>Attach</td>
<td>Click to upload an evaluation document. The document must be a PDF file.</td>
</tr>
<tr>
<td><img src="image" alt="View Icon" /></td>
<td>View</td>
<td>Click to view the document which has been attached. This icon indicates that one document was attached.</td>
</tr>
<tr>
<td><img src="image" alt="Delete Icon" /></td>
<td>Delete</td>
<td>Click to delete an attachment. Please note, once the form has been reviewed by HR, it can no longer be deleted.</td>
</tr>
<tr>
<td><img src="image" alt="View Icon" /></td>
<td>View</td>
<td>Click to view the documents which have been attached. This icon indicates that multiple documents have been attached.</td>
</tr>
<tr>
<td><img src="image" alt="Mail Icon" /></td>
<td>Mail</td>
<td>Click on this icon to send an email to the College HR department or your manager.</td>
</tr>
</tbody>
</table>

_Note:_ Employee names will remain on the workbench up to 60 days after separation so that the manager has time to upload the appraisal. If an employee has been separated from that assignment for more than 60 days, the manager will need to forward the evaluation document to HR in order to upload the attachment.
7.0 APPRAISAL WORKBENCH SPECIAL CIRCUMSTANCES

**Separated Employees** – An employee name will remain on the workbench up to 60 days after separation so that the manager has time to upload the appraisal. If an employee has been separated from that assignment for more than 60 days, the manager will need to forward the evaluation document to HR in order to upload the attachment. Separated employee assignments will be highlighted on any of the workbenches.

**Org Change** – An employee who moves from one location to another in the same job code will appear on the workbench of both the old and new manager (and will appear twice on the HR Workbench as shown below.). This will give the previous manager time to upload an evaluation. Once an evaluation is added, it will appear on the new managers workbench and be marked as completed. After 60 days, the assignment will no longer appear on the former managers workbench.

**Employees on Leave** – For employees who are on a leave and cannot be evaluated because they are not available, click on the “Not Applicable” check box.

**Employees on Leave to Higher** – For employees who are on a leave to higher (a temporary transfer) both managers will receive the evaluation notification. The manager of the position from which they are on leave should click on the “Not Applicable” check box. The manager from the newest position for that employee should complete the evaluation.

**Z Basis Assignments** -- Some employees may appear on your workbench because they have an active assignment, however, an evaluation may not be required. This would include faculty who work a ‘Z’ basis (summer or winter intercession) assignment.

The letters ‘ENR’ will display in the Appraisal Date column.
**Special Assignments** -- For academic employees in an elected position (such as Bargaining Unit Representative or Academic Senate Officer) the assignment will not display on the workbench. The following job codes are not included in EASY:

<table>
<thead>
<tr>
<th>Object abbr.</th>
<th>Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>A0710</td>
<td>Counselor, Coll Barg Replacement</td>
</tr>
<tr>
<td>A0744</td>
<td>Instructor, Coll Barg Replacement</td>
</tr>
<tr>
<td>A0755</td>
<td>Bargaining Unit Representative</td>
</tr>
<tr>
<td>A0756</td>
<td>Academic Senate Officer</td>
</tr>
<tr>
<td>A0888</td>
<td>Bargaining Unit Representative Adjunct</td>
</tr>
<tr>
<td>A0831</td>
<td>Counselor, Adjunct, Collective Bargaining</td>
</tr>
<tr>
<td>A0910</td>
<td>Ancillary Adjunct Service (60% exempt)</td>
</tr>
<tr>
<td>A0754</td>
<td>Academic Senate President</td>
</tr>
<tr>
<td>A0988</td>
<td>Bargaining Unit Rep Adjunct (60% exempt)</td>
</tr>
</tbody>
</table>

For any of the Special Circumstances, you can add a note which will mark the evaluation as “Not Applicable”.

**Steps to enter a Note** to have the status change to ‘Not Applicable’:

Click on the box on the line for the employee.

A pop-up text box will appear. Click on the appropriate link.
The text box will turn white. Type in your comments about why this evaluation is not required. Click execute.

Depending upon the link clicked, a pop-up message will appear. Click the ✔ icon to confirm the message.

Regular Comments

Employee N/A Comments
Note: comments must begin in the upper left corner, otherwise this message will appear:

![Image](comments-empty.png)

**Undo Appraisal Status** – clicking this icon will remove the Appraisal Completed icon and the appraisal will appear on your report as due.

![Image](undo-status.png)
8.0 APPRAISAL WORKBENCH DOCUMENT TYPES

Several different document types can be added to the workbench so that the documents are stored within SAP. Valid Document types can be as follows:

E: Evaluation
S: Supplement
C: Certificates
O: Others

Click on ‘View” to see the documentation.

The document type will display under ‘Title”. Click to the left of the document type to view the attachment.
9.0 APPRAISAL WORKBENCH VIEWS

In the appraisal workbench, you can choose your view. There are two places to do this.

On the selection screen. You can enter the year you want to view.

![Evaluation Work Bench by Due date](image)

In most cases, you will choose the current year. However, you can click on one of the other buttons to see a previous year, next year or click on change year if you want to go several years back of in the future.
10.0 APPRAISAL WORKBENCH - COMMENTS

When a Manager marks the evaluation as “Not Applicable”, they must add comments to why the evaluation is not being completed. In most cases, it is because the person is on a long-term leave.

Note: Once comments are saved, they cannot be deleted. Review your comments before pressing ‘save’. (Comments can be viewed by anyone who has access to the evaluations within your department; delegates, HR staff, etc.…)

Once comments are added in the “Not Applicable” section, the icon will change to .

To undo “Appraisal Completed” status for the employees marked ‘Not Applicable’, please follow steps 1-3 as depicted in the picture below:
11.0 **APPRaisal Workbench – Review and Attachment Delete**

**Steps to Delete Attachments from Workbench:**

- Click on “Delete” button to proceed with document deletion
- Select Year
- Select the document to be deleted from the list
- Confirm Deletion of the document

**Access EASY Manual right from the Workbench:**
### 12.0 Assigning a Departmental Delegate to Upload Documents

The Manager of the Department may decide to assign a campus delegate who will upload the evaluation documents. This delegate will be assigned to upload the documents for that department only. To assign a delegate request the access by contacting Andy Duran at: Durana@email.lacdd.edu. You will be given access within the Portal. To create delegates for your department, click on the “EASY Delegate Setup” link in the Portal.

1. Enter information into all required fields.

#### EASY Delegate Workbench

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
<th>Required?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Campus</td>
<td>4 digit alpha-numeric field to indicate the location.</td>
<td>Yes</td>
</tr>
<tr>
<td>Manager Org. Unit</td>
<td>8 digit number of the organization. Can be obtained from the drop-down. May list more than one.</td>
<td>Yes</td>
</tr>
<tr>
<td>Manager Assignment</td>
<td>Personnel number of the person who will be the delegate.</td>
<td>No</td>
</tr>
<tr>
<td>Delegate User Id</td>
<td>Alpha-numeric value of the delegate. Usually the same as the first characters of their email address.</td>
<td>Yes</td>
</tr>
<tr>
<td>Start Date</td>
<td>Effective date of the change.</td>
<td>No</td>
</tr>
<tr>
<td>End Date</td>
<td>Ending date of the delegation. It will default to 12/31/9999.</td>
<td>No</td>
</tr>
</tbody>
</table>
To set up Delegate for more than one Department within your location, click on the more icon.

A box will appear where you can list the organizational unit numbers.

Press execute which will take you back to the original screen.

Press Execute

Note: Delegate / Proxy should be from the same College.

Delegate Workbench – View Authorized Org Units
13.0 **DEPARTMENTAL DELEGATE STEPS TO UPLOADING EVALUATION DOCUMENTS**

The Departmental Delegate can upload evaluation documents for anyone within the department(s) to which they are a delegate.

**Delegate Workbench – Appraisal Review Process:**
12.0 Delegate Workbench Access from Portal:

To upload the appraisal documents click on the “EASY Delegate Workbench” link in the Portal:

Delegate Evaluation Selection Screen:
Enter information into all required fields. (At a minimum, enter the Reporting Period, Year, and Organizational Unit number).

a. If you are the delegate for a large organizational unit with multiple managers, you can enter the Manager ID (Person ID Number) to reduce the number of entries displayed.

b. You can enter either the Org Unit ID, the Manager ID or both.

c. Load All/Clear All Orgunits to load the Orgunits delegate is Authorized to and Clear them all if needed

---

**Steps to Add Attachments from Delegate Workbench:**

- Click on “Attach” button to proceed with document attachments
- Select Year
- Select the document from Desktop (PDF Format)
Confirmation message that “Attachment successfully attached for the selected Employee”

Notes:
Always load PDF versions of the evaluation and other documentation.

A message will appear when you have successfully uploaded an appraisal document.

A date will then appear in the “Last Appraisal Date” column and a check mark will show in the Appraisal Completed column.

You may use the other icons to view or delete the document. A member of the HR staff should then review and approve the attachment so the “QA done by HR” will be checked.

If you enter a Manager Organization Unit number for which you are not the Delegate, you will see this error message:

Steps to View / Delete Attachments from Delegate Workbench:
- Click on “Delete” button to proceed with document deletion
- Select Year
- Select the document to be deleted from the list
- Confirm Deletion of the document
13.0 **MASS UPLOAD FUNCTIONALITY**

Anyone with Easy workbench access also has access to upload evaluations en masse. The Manager, Delegate or member of the HR team will access the MASS Upload functionality via their appraisal workbench.

**Steps for Mass Upload:**

1. Prepare your files. Each appraisal should be saved into a folder on your computer or shared drive with the following naming convention (no other documents should be saved in this folder).

<table>
<thead>
<tr>
<th>Emp #</th>
<th>Assignment #</th>
<th>Evaluation Yr.</th>
<th>Document Type</th>
<th>Document #</th>
</tr>
</thead>
<tbody>
<tr>
<td>12345678</td>
<td>12345678</td>
<td>2017</td>
<td>E</td>
<td>1</td>
</tr>
</tbody>
</table>

2. Access your Appraisal Workbench

3. Click on the icon ![Mass Upload](attachment:mass_upload_icon.png)

4. This screen will appear. Review the information.
5. Click on Test Run; if all goes well, click on Execute.
6. A message will appear:

Files will take you to the a similar screen as shown below:

Directory will take you to a similar screen as below:
7. Double click on the Folder in your directory and then click ‘OK’.

A message will appear:

ERROR messages – make the corrections in the error messages to the file format (all employee numbers must be 8 digits and all years 4 digits.)

Successful Uploads – when you go back to the workbench you should see the evaluation icon.

Cancelled Upload Process – start over when you are ready.
Information

Mass Attachment process canceled by the User!!
14.0 MASS DOWNLOAD FUNCTIONALITY

Anyone with Easy workbench access also has access to download evaluations en masse. This functionality can be used to download the documents onto a zip or flash drive for back-up or to print documents for a large group of employees at once.

Steps for Mass Download:

1. Click on Mass Upload.

2. The ‘Browse for Folder’ will pop up. Choose the folder where you want to store the documents. Press ‘ok’. (Or click on Make New Folder).
3. A pop-up message will appear. Click “Remember My Decision” and then ‘Allow’.

4. An informational message will appear:
15.0 **DEPARTMENTAL / CAMPUS EVALUATION STATUS REPORTS**

Most campus and management reports are available in the Portal. Access to reports is based upon your roles and responsibilities. See your Campus Personnel department for assistance.

Reports which are available to you will be shown in the Manager’s Desktop.

Click on Managers Desktop → Performance Appraisal → Appraisal Workbench to view all reports available to you. Samples of the reports are shown below.

![Manager's Desktop - Appraisal Workbench](image)

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**EASY Work Bench For All Easy Reports**

Manager Evaluation Work Bench

- **Appraisal Workbench**
- **Own Data**
- **College Wide**
- **Summary**
- **Detail**
- **Detail All**
- **Future Due**
- **Summary/Detail Status**
- **Reserved For Education Service Center HR**

### Appraisal Workbench
- **Evaluation Form Status Report** displays Employee Name, Due Date, ETC
- **Report** displays Evaluation Data for your department only. Data whether evaluation items are completed.
- **Report** displays EASY Details for all campus-wide.
- **Report** displays summary for all evaluation items in your dept. Shows how many items where on time ETC.
- **Report** displays details of all evaluation items in your dept with employee name and if it was done on time.
- **Report** displays details for campus/dept. you have selected.
- **Report** displays evaluation all future due.
- **EASY Summary/Detail Status Complete. Report** displays current employee completion status.

---

**EASY Evaluation Document Finder**
- **Report** displays evaluation by manager id selected. Used by HR for acknowledgement.

---

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- **Report** displays details for campus/dept. you have selected.
- **Report** displays evaluation all future due.
- **EASY Summary/Detail Status Complete. Report** displays current employee completion status.

---

**EASY Evaluation Document Finder**
- **Report** displays evaluation by manager id selected. Used by HR for acknowledgement.
Own Data Report

This report displays evaluation data for your department only. The selection screen and the output for this report looks as follows:

<table>
<thead>
<tr>
<th>FIELD</th>
<th>REQUIRED – “R”</th>
<th>OPTIONAL – “O”</th>
<th>IMPACT</th>
</tr>
</thead>
<tbody>
<tr>
<td>Employee Personnel Number</td>
<td>O</td>
<td>O</td>
<td>If added, the report will only show the numbers requested.</td>
</tr>
<tr>
<td>Due Date</td>
<td>O</td>
<td>O</td>
<td>Will narrow the report for a specific period of time due.</td>
</tr>
<tr>
<td>Manager Personnel Number</td>
<td>O</td>
<td>O</td>
<td>Will narrow the report by manager.</td>
</tr>
<tr>
<td>Year</td>
<td>R</td>
<td>O</td>
<td>Will default to the current year; can be changed as needed.</td>
</tr>
<tr>
<td>Include Hierarchy Supervisors</td>
<td>O</td>
<td>O</td>
<td>Will include the supervisors as well as the managers for an org. unit.</td>
</tr>
<tr>
<td>Include data 50 days in the past</td>
<td>O</td>
<td>O</td>
<td>Will include employees who have separated or left your organizational unit within the past 50 days.</td>
</tr>
<tr>
<td>Include Employee Not Applicable</td>
<td>O</td>
<td>O</td>
<td>Will include employees who have not been evaluated since they are not available (such as on a long-term leave.)</td>
</tr>
</tbody>
</table>

Steps from the EASY Work Bench:

1. Click on Own Data
2. Enter the Required fields for the report.
3. Enter any optional selection criteria.
4. Click “Execute”.

The red box indicates that the evaluation is over due. The Status box will turn green when the evaluation is completed.
College Wide Report

This report displays evaluation data for your department only. The selection screen and the output for this report looks as follows (you can choose to include none, one, two or all three of the additional values in the Selection Parameters section.

<table>
<thead>
<tr>
<th>FIELD</th>
<th>REQUIRED – “R”</th>
<th>OPTIONAL – “O”</th>
<th>IMPACT</th>
</tr>
</thead>
<tbody>
<tr>
<td>Employee Personnel Number</td>
<td>O</td>
<td>O</td>
<td>If added, the report will only show the numbers requested.</td>
</tr>
<tr>
<td>Due Date</td>
<td>O</td>
<td>O</td>
<td>Will narrow the report for a specific period of time due.</td>
</tr>
<tr>
<td>Manager Personnel Number</td>
<td>O</td>
<td>O</td>
<td>Will narrow the report by manager.</td>
</tr>
<tr>
<td>Year</td>
<td>R</td>
<td></td>
<td>Will default to the current year; can be changed as needed.</td>
</tr>
<tr>
<td>Include Hierarchy Supervisors</td>
<td>O</td>
<td></td>
<td>Will include the supervisors as well as the managers for an org. unit.</td>
</tr>
<tr>
<td>Include data 60 days in the past</td>
<td>O</td>
<td></td>
<td>Will include employees who have separated or left your organizational unit within the past 60 days.</td>
</tr>
<tr>
<td>Include Employee Not Applicable</td>
<td>O</td>
<td></td>
<td>Will include employees who have not been evaluated since they are not available (such as on a long-term leave.)</td>
</tr>
</tbody>
</table>

Steps from the EASY Work Bench:

1. Click on Own Data
2. Enter the Required fields for the report.
3. Enter any optional selection criteria.
4. Click “Execute”.

![Evaluation Alert System (EASY) Report]

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Summary Report

The Summary Report displays a summary for all evaluation items in your Department. It shows how many items were on time vs. past due and how by long they were overdue. Enter the year and click one or more of the radial buttons. The selection screen and the output for this report looks as follows:

<table>
<thead>
<tr>
<th>FIELD</th>
<th>REQUIRED – “R”</th>
<th>IMPACT</th>
</tr>
</thead>
<tbody>
<tr>
<td>Year</td>
<td>R</td>
<td>Will default to the current year; can be changed as needed.</td>
</tr>
<tr>
<td>Include data 60 days in the past</td>
<td>O</td>
<td>Will include employees who have separated or left your organizational unit within the past 60 days.</td>
</tr>
<tr>
<td>Campus – Report display campus list</td>
<td>O</td>
<td>Will include all departments for the location.</td>
</tr>
<tr>
<td>Aging – If Aging is checked / unchecked report displays uncompleted items</td>
<td>O</td>
<td>Displays how many days past due</td>
</tr>
<tr>
<td>Year – If Year is checked report will include data from the past 365 days</td>
<td>O</td>
<td>This option is based upon evaluations completed / past due within the past 365 days.</td>
</tr>
<tr>
<td>Include Employee Not Applicable</td>
<td>O</td>
<td>Includes a summary of Employee Not Applicable.</td>
</tr>
</tbody>
</table>

Steps from the EASY Work Bench:

1. Click on Own Data
2. Enter the Required fields for the report.
3. Enter any optional selection criteria.
4. Click “Execute”.

![Evaluation Alert System Summary Report](image)

![Evaluation Alert System Completed Summary report](image)
Detail Report

The Detail Report displays details of all evaluation items in your Department with employee name and if it was done on-time. The selection screen and the output for this report looks as follows:

<table>
<thead>
<tr>
<th>FIELD</th>
<th>REQUIRED – “R”</th>
<th>OPTIONAL – “O”</th>
<th>IMPACT</th>
</tr>
</thead>
<tbody>
<tr>
<td>Year</td>
<td>R</td>
<td>O</td>
<td>Will default to the current year; can be changed as needed.</td>
</tr>
<tr>
<td>Include data 60 days in the past</td>
<td>O</td>
<td>Will include employees who have separated or left your organizational unit within the past 60 days.</td>
<td></td>
</tr>
<tr>
<td>Aging – if Aging is checked / unchecked report displays uncompleted items</td>
<td>O</td>
<td>Displays how many days past due</td>
<td></td>
</tr>
<tr>
<td>Include Employee Not Applicable</td>
<td>O</td>
<td>Includes a summary of Employee Not Applicable.</td>
<td></td>
</tr>
</tbody>
</table>

Steps from the EASY Work Bench:

1. Click on Own Data
2. Enter the Required fields for the report.
3. Enter any optional selection criteria.
4. Click “Execute”.

![Evaluation Alert System Detail Report](image)
Detail All Report

The Detail All Report displays details for the Campus/Department you have selected. The selection screen and the output for this report looks as follows:

<table>
<thead>
<tr>
<th>FIELD</th>
<th>REQUIRED – “R”</th>
<th>OPTIONAL – “O”</th>
<th>IMPACT</th>
</tr>
</thead>
<tbody>
<tr>
<td>Campus</td>
<td>R</td>
<td></td>
<td>Enter the location or campus. This is a 4 digit alpha numeric value (ex. C000, D000)</td>
</tr>
<tr>
<td>Department</td>
<td>O</td>
<td></td>
<td>Choose from the drop down list to find the 8 digit numeric code for each department. You must enter the campus first.</td>
</tr>
<tr>
<td>Year</td>
<td>O</td>
<td></td>
<td>If the year field is left blank, the report will display data for the past 365 days.</td>
</tr>
<tr>
<td>Aging</td>
<td>O</td>
<td></td>
<td>If aging is checked, the report will display uncompleted items. If this box is unchecked it will display completed evaluations.</td>
</tr>
<tr>
<td>Current Date</td>
<td>O</td>
<td></td>
<td>Include data for 60 days in the past.</td>
</tr>
<tr>
<td>Absence Employee</td>
<td>O</td>
<td></td>
<td>Include Employee Not Applicable.</td>
</tr>
</tbody>
</table>

Steps from the EASY Work Bench:
1. Click on Own Data
2. Enter the Required fields for the report.
3. Enter any optional selection criteria.
4. Click “Execute”.

![EASY Detail report by campus/Dept.](image-url)
Future Due Report

The Future Due Report displays details for the Campus/Department you have selected on performance evaluation due in the future (for the Evaluation Year indicated). The selection screen and the output for this report looks as follows:

<table>
<thead>
<tr>
<th>FIELD</th>
<th>REQUIRED – “R”</th>
<th>OPTIONAL – “O”</th>
<th>IMPACT</th>
</tr>
</thead>
<tbody>
<tr>
<td>Reporting Period</td>
<td>R</td>
<td>Optional – “O”</td>
<td>Use Today most of the time. Can change to another reporting period such as a range of date by clicking to the right to change the selection values.</td>
</tr>
<tr>
<td>Personnel Number</td>
<td>O</td>
<td>Optional – “O”</td>
<td>The personnel number of the employees you want to see. If you leave this blank, it will display all employees who meet the other criteria filtered in the report.</td>
</tr>
<tr>
<td>Employment Status</td>
<td>O</td>
<td>Optional – “O”</td>
<td>Can change to view only active or only withdrawn employees. 3 – Active, 0 - Withdrawn</td>
</tr>
<tr>
<td>Personnel Area</td>
<td>O</td>
<td>Optional – “O”</td>
<td>Enter the location or campus. This is a 4 digit alpha numeric value (ex. C000, D000)</td>
</tr>
<tr>
<td>Personnel Subarea</td>
<td>O</td>
<td>Optional – “O”</td>
<td>Can restrict the report by bargaining unit. Use the drop down to choose options. Or you can type the letters. To see all faculty for example, you can enter F*. All Classified - C* and O*.</td>
</tr>
<tr>
<td>Employee Group</td>
<td>R</td>
<td>Optional – “O”</td>
<td>Leave defaulted to ‘X’</td>
</tr>
<tr>
<td>Employee Subgroup</td>
<td>O</td>
<td>Optional – “O”</td>
<td>Can pull a report for all regular employees by entering S*. Salaried adjuncts P*.</td>
</tr>
<tr>
<td>Evaluation Year</td>
<td>O</td>
<td>Optional – “O”</td>
<td>The year will default to the current year.</td>
</tr>
<tr>
<td>Due Date (Future Due Days)</td>
<td>O</td>
<td>Optional – “O”</td>
<td>Can be used to capture evaluations due for any given date or semester. (Can add a number up to 999 days in the future.)</td>
</tr>
<tr>
<td>Include Past Due Evaluations</td>
<td>O</td>
<td>Optional – “O”</td>
<td>Includes those evaluations which are past due.</td>
</tr>
</tbody>
</table>
Steps from the EASY Work Bench:

1. Click on Own Data
2. Enter the Required fields for the report.
3. Enter any optional selection criteria.
4. Click “Execute”.
Summary / Detail Status Report
The Summary / Detail Status Report displays completion details for the Campus/Department you have selected for the period of time indicated on the top line. The selection screen and the output for this report looks as follows:

<table>
<thead>
<tr>
<th>FIELD</th>
<th>REQUIRED – “R”</th>
<th>OPTIONAL – “O”</th>
<th>IMPACT</th>
</tr>
</thead>
<tbody>
<tr>
<td>Reporting Period</td>
<td>R</td>
<td></td>
<td>Use “Today” most of the time. Can change to another reporting period such as a range of dates by clicking to the right to change the selection values.</td>
</tr>
<tr>
<td>Personnel Number</td>
<td>O</td>
<td></td>
<td>The personnel number of the employees you want to see. If you leave this blank, it will display all employees who meet the other criteria filtered in the report.</td>
</tr>
<tr>
<td>Employment Status</td>
<td>R</td>
<td></td>
<td>Can be used to view only active or only withdrawn employees. 3 – Active, 0 – Withdrawn. In most cases, leave the defaults.</td>
</tr>
<tr>
<td>Personnel Subarea</td>
<td>O</td>
<td></td>
<td>Can restrict the report by bargaining unit. Use the drop down to choose options. Or you can type the letters. To see all faculty for example, you can enter F*. All Classified – C* and O*.</td>
</tr>
<tr>
<td>Employee Group</td>
<td>O</td>
<td></td>
<td>Enter a value only if you want to restrict the report to Salaried “S”, Hourly “H” or Salaried Adjunct “P”.</td>
</tr>
<tr>
<td>Employee Subgroup</td>
<td>O</td>
<td></td>
<td>Can pull a report for all regular employees by entering S*. Salaried adjuncts P*. A more specific report can be pulled by entering the two digit values such as: 5M – Salaried Monthly, 52 – Salaried Semi Monthly.</td>
</tr>
<tr>
<td>College / Business Area</td>
<td>R</td>
<td></td>
<td>Enter the location or campus. This is a 4 digit alpha numeric value (ex. C000, D000)</td>
</tr>
<tr>
<td>List All</td>
<td>O</td>
<td></td>
<td>The report will display all evaluations during that time period. You can sort and filter the excel file.</td>
</tr>
<tr>
<td>QA Done</td>
<td>O</td>
<td></td>
<td>The report will only display those evaluations which have been marked as “QA Completed” by HR.</td>
</tr>
<tr>
<td>Ready for QA</td>
<td>O</td>
<td></td>
<td>This report will display all evaluations which have an attachment or have been marked as “NA” but is still waiting for QA review by HR.</td>
</tr>
<tr>
<td>Evaluation Complete</td>
<td>O</td>
<td></td>
<td>This report will display all employees, both with an attachment and those marked as “NA” which are completed.</td>
</tr>
<tr>
<td>Evaluation Not Complete</td>
<td>O</td>
<td></td>
<td>This report includes employees who require an evaluation (which is not marked as “NA”).</td>
</tr>
<tr>
<td>Year</td>
<td>O</td>
<td></td>
<td>The year will default to the current year. Can be changed if you want a report for a different year.</td>
</tr>
<tr>
<td>Manager ID</td>
<td>O</td>
<td></td>
<td>Enter the 8 digit personnel number of the manager if you want a report of a certain manager only.</td>
</tr>
</tbody>
</table>
Steps from the EASY Work Bench:

1. Click on Own Data
2. Enter the Required fields for the report.
3. Enter any optional selection criteria.
4. Click “Execute”.

**EASY Summary/Detail Completion Report**

Period
- Reporting Period: Other Period
  - Start Date: 06/16/2017
  - End Date: 12/31/9999

Selection Criteria
- Personnel Number
- Employment Status: 1
- Personnel subarea
- Employee group
- Employee subgroup

More Selection Criteria
- College/Business Area
- List All
- QA done
- Ready for QA
- Evaluation Complete
- Evaluation Not Complete

Year and Manager ID
- Year: 2017
- Manager ID: Blank
16.0  HR WORKBENCH – THE APPRAISAL QUALITY ASSURANCE REVIEW

The Human Resources Division will review each evaluation which is uploaded into the system. If there is a problem with the evaluation, they will notify the manager who completed the form.

Human Resources staff (who are not managers) will access the HR Quality Assurance Workbench to view data using the SAP ERP GUI. There are two transaction codes which will give them Quality Assurance Workbench access: ZEASY_HR or ZEASYWB.

Transaction Code: ZEASY_HR

This transaction code takes you directly to the Quality Assurance Work Bench selection screen. The selection screen for this report looks as follows:
Transaction Code: **ZEASYWB**

Transaction code ZEASYWB takes you to the EASY Workbench, which includes multiple selection screens. The Workbench looks as follows:

Click on HR Report to access the selection screen for the Quality Assurance Workbench. This HR Report is used to perform a quality assurance check of the evaluations which have been completed by each manager. HR staff will enter data into one or more of the boxes to restrict the number of evaluations which appear. The selection screen and the output for this report looks as follows:
After reviewing the attachment, click the box “QA done by HR”. This will complete the evaluation process.

<table>
<thead>
<tr>
<th>Emp. perr</th>
<th>First Name</th>
<th>Last Name</th>
<th>Birth Month</th>
<th>Birth Day</th>
<th>Entry Date</th>
<th>Appr. Done</th>
<th>View</th>
<th>QA done by HR</th>
</tr>
</thead>
<tbody>
<tr>
<td>714487</td>
<td>Mr. Jerold</td>
<td>Eric</td>
<td>4</td>
<td>28</td>
<td>06/11/2013</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>771026</td>
<td>Ms. Sandra</td>
<td>Soledad</td>
<td>2</td>
<td>11</td>
<td>02/02/2015</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>773010</td>
<td>Ms. Letitia</td>
<td>Jade</td>
<td>7</td>
<td>18</td>
<td>06/11/2013</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>775039</td>
<td>Ms. Loretta</td>
<td>Fern</td>
<td>1</td>
<td>7</td>
<td>06/11/2013</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>785228</td>
<td>Ms. Charlene</td>
<td>Lora</td>
<td>10</td>
<td>16</td>
<td>06/11/2013</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>799026</td>
<td>Ms. Selena</td>
<td>Deloris</td>
<td>4</td>
<td>16</td>
<td>06/11/2013</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>801153</td>
<td>Ms. Barb</td>
<td>Margaret</td>
<td>6</td>
<td>23</td>
<td>09/12/2016</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Please note, once you click on the “QA done by HR” approval button, the evaluation document can no longer be deleted.
17.0 **THE APPRAISAL QUALITY ASSURANCE REVIEW BY HR MANAGERS**

The Human Resources Division Management may also review each evaluation which is uploaded into the system. If there is a problem with the evaluation, they will notify the manager who completed the form.

Human Resources Managers will access the HR Quality Assurance Workbench to view data through the Portal.

- HR Personnel logs in thru Portal and access “HR Report” thru Manager Desktop-> Appraisal Workbench’
- HR Personnel keys in “Year”, “Manager Pernr” and other selection criteria like “Personnel Subarea”, Employee group and subgroup” to run the Report
- HR Person can View Attachment(s)/Attach a Appraisal Document and/or Delete attachment for the Employees that manager wants HR to perform the task
- HR Person reviews the Attachments done by Manager(s) and click on “QA Done by HR” to complete the Appraisal Review process

**HR Workbench – Appraisal Quality Assurance Review Process:**

- [HR Personnel logs in thru the Portal to access Workbench]
- [Access “HR Report” thru Manager Desktop]
- [HR Person keys in Year and “Manager Perm” to run the Report]
- [Review Attachments and Click on “QA Done by HR”]
- [View/Attach/Delete Attachments for the Employees]

This completes the Appraisal review process for Employees
HR Quality Assurance Access from Portal:

To review the appraisal documents click on the “Managers Desktop” tab in the Portal. Click on “HR Report”:
Enter information into all required fields. (At a minimum, enter the Year and Manager ID.)

a. The more you restrict the selection criteria, the quicker the report will run.
b. You can enter data in any of the other selection fields to restrict the output.

The appraisals meeting the criteria entered will be displayed.
HR Workbench– Appraisal Deletion Process

HR staff may be asked to delete an appraisal document by a campus or may remove a document if it is not an appraisal document.

Steps to Delete Attachments from Workbench:
- Click on “Delete” button to proceed with document deletion
- Select Year
- Select the document to be deleted from the list
- Confirm Deletion of the document
18.0  HR PROCESSING – UPLOADING EVALUATION DOCUMENTS

HR Evaluation Upload Access from SAP Gui:

Human Resources staff will have access to loading Evaluation documents for a department or campus.

Transaction Code: ZEASY_HR

Tip: If you have one evaluation to upload, enter the Personnel Number. If you have many for one department, enter the Manager ID.

Click execute.
Appraisals which are due will appear. Click on the attach icon to upload a PDF version of the appraisal. You can use the icon to load additional attachments too. A date will then appear in the “Last Appraisal Date” column and a check mark will show in the Appraisal Completed column.

Note: Always load PDF versions of the evaluation and other documentation.

A message will appear when you have successfully uploaded an appraisal document.

You may use the other icons to view or delete the document. A member of the HR staff should then review and approve the attachment so the “QA done by HR” will be checked.

Note: Once HR has reviewed the document, the evaluation document can no longer be deleted and a check mark will appear in the “QA done by HR” column.
HR Evaluation Upload Access from HR Workbench

In certain circumstances, HR staff may be asked to upload the appraisal documents for a department or manager.

**Steps to Attach Documentation from HR Workbench:**

- Click on “Attach” button to proceed with document attachments
- Select Year
- Select the document from Desktop (PDF Format)
- Confirmation message that “Attachment successfully attached for the selected Employee”

### Appraisal Review Attachment Process

- Click here to view the Attachments
- Click here to delete existing Attachments
- Click here to select an attachment from the desktop and Attach
- Click here to save attachments
**Steps to Delete Documentation from HR Workbench:**

- Click on “Delete” button to proceed.
- Select Year.
- Highlight the appraisal which should be deleted.
- Click delete again.
- Warning message “Delete link? Caution: Last link!” Press ‘Yes” to continue.
- Confirmation message that “Number of deleted documents and links”.

**Appraisal Review Deletion Process**

This message will appear. Click on Yes if you want to delete the document.

The document will open which will give you a review of what is being deleted. After closing that window, a message will appear to confirm that the document has been deleted.
19.0 HR PROCESSING – THE DIGITAL EVALUATION SEARCH FEATURE

Human Resources staff will access the Digital Evaluation Search Feature to search for employees in the EASY Workbench. This feature is available in the SAP ERP GUI. The transaction code is: ZEASYWB.

Click on Evaluation Document Finder to launch the search tool.

Click on the start search button. A Key Field Entry screen will appear. Enter the employee number and then execute.
A hit list will appear which indicates how many documents have been attached.

Click on the Appraisal folder and a listing of appraisals will be displayed. The last four digits in the numeric sequence indicates year.

Double click on one of the lines to open the document.
Human Resources staff will access the EASY District-wide reports using the SAP ERP GUI. The transaction code is: ZEASYSUMMARY.

Transaction Code: **ZEASYSUMMARY** - easy summary report

This transaction code is used to check how many evaluations have been completed by each college on-time or past-due. Enter data into one or more of the boxes to restrict the number of colleges which appear. The selection screen and the output for this report looks as follows:

<table>
<thead>
<tr>
<th>FIELD</th>
<th>REQUIRED – “R”</th>
<th>IMPACT</th>
</tr>
</thead>
<tbody>
<tr>
<td>Year</td>
<td>R</td>
<td>Will default to the current year; can be changed as needed.</td>
</tr>
<tr>
<td>Report by Campus</td>
<td>O</td>
<td>Can filter by location.</td>
</tr>
<tr>
<td>Aging – if Aging is checked / unchecked report displays uncompleted items</td>
<td>O</td>
<td>Displays how many days past due</td>
</tr>
<tr>
<td>Past 365 Days</td>
<td>O</td>
<td>Includes a summary of all Employee for the past 365 days.</td>
</tr>
</tbody>
</table>
21.0 Roles and Authorizations

Access to view various reports and to upload appraisal documents is based upon a role which grants authorizations. The following table shows the roles for EASY:

<table>
<thead>
<tr>
<th>Position / Location</th>
<th>Role</th>
<th>Access Includes</th>
</tr>
</thead>
<tbody>
<tr>
<td>District IT</td>
<td>Z1_D_IT_EASY_MGR</td>
<td>Ability to view reports campus-wide.</td>
</tr>
<tr>
<td>District Manager</td>
<td>Z1_D_EASY_MGR</td>
<td>Ability to view reports for their department within the ESC and to upload evaluation documents for employees within those org units.</td>
</tr>
<tr>
<td>District HR</td>
<td>Z1_D_HR_EASY</td>
<td>Ability to view reports district-wide and provide quality assurance.</td>
</tr>
<tr>
<td>Campus Manager</td>
<td>Z1_CAMPUS_EASY_MGR and Z1_CAMPUS_EASY_MGR_MASTER</td>
<td>Ability to view reports for their department(s) at the campus and to upload evaluation documents for employees within those org units.</td>
</tr>
<tr>
<td>Campus HR Manager</td>
<td>Z1_CAMPUS_HR_MGR_EASY</td>
<td>Ability to view reports campus-wide.</td>
</tr>
<tr>
<td>Delegate</td>
<td>Z1_ZEASY_DELEGATE_SETUP</td>
<td>Ability to view reports within the Org Units as a Delegate and to upload evaluation documents for employees within those org units.</td>
</tr>
</tbody>
</table>

Note that a person may be given more than one role. For example, a campus manager who is also a delegate for other departments could have three roles: Z1_CAMPUS_EASY_MGR, Z1_CAMPUS_EASY_MGR_MASTER and Z1_ZEASY_DELEGATE_SETUP. A manager within the ESC Human Resources Division may have both Z1_D_HR_EASY and Z1_D_EASY_MGR.
22.0 FREQUENTLY ASKED QUESTIONS (FAQ’s)

1. Why doesn’t EASY send me a reminder every week? The Human Resources Division determined that 60/30 days before and 14/28 days after was the best reminder schedule.

2. How can I see which evaluations are due for my department? You can review which evaluations are due anytime by going to the Portal → Manager Services → Evaluation Alert System

3. Can someone else upload documents besides the manager? Each manager can assign a departmental delegate to upload the evaluation documents. The access will be controlled by the organizational unit.

4. Which reports are available to me? EASY reports vary based upon your role. You can tell which reports are available to you by looking at the menu under Appraisal Workbench in the Portal. Not all reports are available to everyone.

5. Can I delete an evaluation form? Yes. Prior to HR review, you can click on the ‘delete’ icon to remove an evaluation form. The ‘view’ icon will change depending upon how many attachments remain after you remove the first document. If no documents remain attached, the ‘view’ field will be blank.

6. What happens when the organization structure is changed? Am I still responsible for completing the evaluation form for the employee? If the evaluation was due under your management, you are still responsible for completing the evaluation form. If the previous manager no longer works for LACCD, the new manager will complete the due evaluation form.

7. Is there someone on the campus who can obtain completion rates for each department? Each College will have one HR Representative who can pull reports which list completion rates by department.

8. Is there someone I can speak with if I have a question? Yes, if you have a question about the workflow, contact your campus SPOC. If you have any other questions, send an email to: SAP HR DO HELP.

9. Where can I find the most recent copy of this document? When viewing any workbench (Manager, Delegate or HR) click on the ‘Help’ icon. By pressing ‘Help’ the most current EASY Manual can be downloaded.