


# ACES Administrative Delegated Access Manual

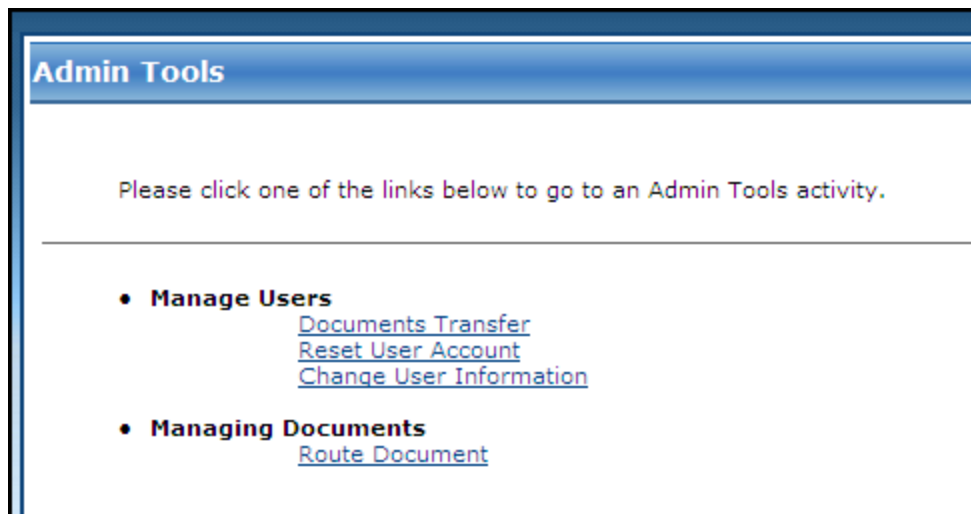
Authorized Access Required

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## **Important Note**

Prior to using Administrative functions to update email address and supervisor, be sure to first make updates in HRCMS.

Here is the complete menu you should see after clicking on **Admin Tools**  link:



## Documents Transfer – Changing Supervisors

**Documents Transfer** - This is the link you use to change someone's appraising manager between monthly uploads.

You'll need to know the employee IDs for the following:

- ✓ Reporting Manager
- ✓ Former Appraising Manager
- ✓ New Appraising Manager

### **Documents Transfer**

Use this page to transfer existing documents from reporting manager's previous appraising manager to new appraising manager.

Transfer Reporting Manager	<input type="text" value="111111"/>	<a href="#">Find User</a>
Transfer From Appraising Manager	<input type="text" value="222222"/>	<a href="#">Find User</a>
Transfer To Appraising Manager	<input type="text" value="333333"/>	<a href="#">Find User</a>
Update Reporting Manager's Appraising Manager Field	<input checked="" type="checkbox"/>	
Automatic Appraising Manager Transfer.	<input checked="" type="checkbox"/>	<i>Automatic insertion of new appraising manager as next document recipient if not already.</i>
	<input checked="" type="checkbox"/>	<i>Automatic Inbox Document Transfer To New Appraising Manager</i>
	<input checked="" type="checkbox"/>	<i>Automatic En Route Document Transfer To New Appraising Manager</i>
	<input checked="" type="checkbox"/>	<i>Automatic Completed Document Copy to New Appraising Manager</i>

### Instructions

1) Research the user via the **Directory** button. Create a 3-column list.

<u>Rep Mgr</u>	<u>Former app mgr</u>	<u>New app mgr</u>
Name	Name	Name
Emplid	Emplid	Emplid

2) Click on “Admin Tools” and “Document Transfer” link

3) **Transfer from Reporting Manager:** Type employee ID of the reporting manager who has new manager

4) **Transfer from Appraising Manager:** Type employee ID of former appraising manager

5) **Transfer to Appraising Manager:** Type employee ID of new appraising manager


6) For the rest of the boxes on the screen, click ALL the empty boxes, so that check marks appear in the boxes (see sample above).

7) Click on the **Transfer Reporting Manager's Document** button and a message will appear on the screen. **Document Transfer was successful and E-Mail notifications were sent.** This confirms the transaction was processed.

8) You will also receive an email notification confirming that the document has been routed to the new manager. The subject of the email will indicate **Notifications on auto-routing documents.**

## Reset User Accounts: Unlocking an Account

You will use this feature when an ACES account gets locked. This happens when a user enters the wrong password at least five times in a one-minute period. On the sixth attempt, he/she will receive the message below. Although HRD still processes these requests at [ACES Help](#), ACES Coordinators should let their employees know that they can also unlock the accounts.

 **You've reached the maximum number of login attempts. Your account is now locked. Contact your administrator for more details.**

**Username:**

**Password:**

[Forgot Your Password?](#)

### Instructions

- 1) Click on **Admin Tools** button and **Reset User Account**
- 2) Do a search by last name or username (employee ID) and click **Search Users** button (see sample above)
- 3) If the account is locked, there is a red “x”.

### Resetting User Accounts

Use this page to reset user accounts. Any locked user accounts will be re-activated.

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**Find:**

**Filtered by:**

**With:** **First Name**  and  
**Last Name**  and  
**Username**  and  
**Job Code**

**Using:**

<input type="checkbox"/> Select All	Status	Username	First Name	Last Name	Division	Department	Location	Job Code
<input type="checkbox"/>	X	aaaa1	Alex	Anderson1	N/A	4000	PRN	ChrgRN
<input type="button" value="Reset Selected Users"/>								

### Instructions for Unlocking Accounts (continued)

4) Click in box to left of **X**.

5) Click on **Reset Selected Users** button and you'll see a message that 1 user account has been reset.

<input type="checkbox"/> Select All	Status	Username	First Name	Last Name	Division	Department	Location	Job Code
<input checked="" type="checkbox"/>	X	aaaa1	Alex	Anderson1	N/A	4000	PRN	ChrgRN
<input type="button" value="Reset Selected Users"/>								

6) You can verify that the account is not locked by following steps 2 through 3 above. The user's account below is NOT locked, as there is a green check mark under the **Status** column.

<input type="checkbox"/> Select All	Status	Username	First Name	Last Name	Division	Department	Location	Job Code
<input type="checkbox"/>	✓	aaaa1	Alex	Anderson1	Train	TRN	PRN	ChrgRN
<input type="button" value="Reset Selected Users"/>								

### **How does user get their correct password?**

7) To send the user their password so they won't get locked again, ask the user to click on "forgot your password" link on the login screen. You as the ACES Coordinator could also complete this on behalf of the user.

<b>Username:</b>	<input type="text"/>
<b>Password:</b>	<input type="password"/>
<input type="button" value="Login"/>	
<a href="#">Forgot Your Password?</a>	

8) This brings you to another screen where you enter the username or employee ID. Click on "email me" and user should receive an email within a minute with their current login information.

<b>Username:</b>	<input type="text" value="106643"/>
<input type="button" value="Email Me"/>	

#### **Note:**

If the user does not receive an email within a minute, it usually means his/her email is invalid in HRCMS and ACES. Your payroll staff can update HRCMS. See next section [Change User Information: Change email address, departments or ACES Coordinator](#) for updating email address in ACES.

## **Change User Information: Change email address, departments or ACES Coordinator**

You use this feature to update a manager's email address, ACES Coordinator (HR Rep), Division, or Dept. between monthly uploads.

### Change user information.

Use this page to change the user information.

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**Find:**

**Filtered by:**

**With:** **First Name**   
**Last Name**   
**Username**   
**Job Code**

**Using:**

**Active Users Only:** ☒

**Active Users Only:** ☒

\* Required Fields

Use document transfer screen to change appraising manager information.

\* Username:

\* First Name:

\* Last Name:

Middle Name:

\* Gender: ☐ Male ☒ Female

\* Email:

\* Manager:

\* Human Resource:  [\(No HR\)](#)

\* Department:

Job Code:

Division:

Location:

\* Time Zone:

Hire Date:

Employee Id:

Title:

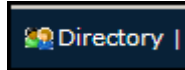
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Instructions:

- 1) Click on **Admin Tools** button and **Change User Information**
- 2) Type in the last name or username, and click the **Search Users** button.
- 3) Click in the radio button to access the manager's information, and click on **"Edit Information"**
- 4) Find the field you want to edit, such as **"Email"**
- 5) Type in the revised email address and click on **"Save Changes"** button. A message will appear confirming edits have been saved.

Your data has been saved.

- 6) You can verify the new email address is displaying in the directory button in upper right corner of the screen, by clicking on "Directory" button and entering **last name** or **user name** and the **"Search"** button.



**Inter-agency transfers (continue with next steps)**

- 7) If you have used the Documents Transfer screen and managers have transferred from one dept or one secretariat to another, you will want to update **Division, Department, and Human Resource** (username of ACES Coordinator) field, **Agency** and **Functional Title** (see instructions that follow).

A screenshot of a web form for updating user information. The form contains several input fields: Grade Level (M7), Agency (Human Resources Divi), Functional Job Code, Functional Title, Ethnic Origin, Appropriation Account, FTE, Job Number, HR/CMS Division, PayOrg, Home Unit, HR/CMS Job Location, Salary Plan, Functional Title (official form tester#1), Last Updated Date (24-Jan-07), Matrix Manager (No Manager), and Default Locale (English). Two callout boxes with arrows point to the 'Agency' and 'Functional Title' fields, labeled 'New Agency Name' and 'New Functional Title' respectively. At the bottom are 'Save Changes' and 'Reset' buttons.

- 8) **Human Resource.** Type in the username of the ACES Coordinator in the new agency. This is the employee ID of the ACES Coordinator. (see screen shot on [page 5](#))
- 9) To change **Division** or **Department**, use the drop-down menu next to those fields. Please note if you change Departments, the Division field does not automatically change to the correct division. You need to manually select both the Division and Department.

- 10) **Agency:** Type in the new Agency Name.
- 11) **Functional Title:** Enter new functional title; be sure to keep within 30 characters.
- 12) Click on **Save Changes** button. You can check new information via the **Directory** button.

### **Route Document**

Use this feature to move a form from one stage to another stage in planning, progress, final review and ACES coordinator stage. You would use this feature if a certain step has been completed, but the

appraising manager has not clicked on the **DONE**  button to close the stage.

<b>Important Note:</b>	Using Route Documents skips all the validation in the form (i.e., manager objectives adding up to 100%, between 2 and 4 Manager Objectives having been entered, at least one Career Growth Objective having been added, and progress and final ratings having been entered on the form). Therefore, prior to routing a document, please verify through reviewing the actual ACES form, that all required fields have been filled out as appropriate.
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You can find the form to route by **Form ID (also referred to as Document ID)**, by **form template**, by **Employee's folder**, or by **Subject User**. The steps below find forms by Form ID or Document ID.

- 1) Click on **Admin Tools** button and **Route Document**
- 2) Enter the **Form ID/Document ID** and click on **Search**.

<b>Note:</b>	To access Document IDs, see next section entitled <a href="#">Accessing Document ID Numbers</a>
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[Back to Admin Tools](#)

## Route Document

Search for Forms

Select Forms

Select An Action

Summary

*First, search for the forms.*

Search By:

- 3) The screen below will appear. Confirm it is the correct form by looking at **form title** and verifying that the correct parties (reporting manager and appraising manager) are listed before pressing any buttons.
- 4) If have accessed the wrong form, click on the “back” button to navigate back to the **Route Document** page.

**Form Title : 2012 ACES Form for James Bento** ( Doc Id: 34741 )

☐ Current step of selected forms 
 ☐ Iterative Step 
 ☐ Collaboration Step 
 ☐ Step Owner

Current State	End State
1. Planning James Bento Mark Lanc... Due Date: 03/02/2012 <b>1 forms</b>	

How do you want to route the form?

- ☐ Move the form one step forward
- ☐ Move the form one step back
- ☐ Move the form to a specific step
- ☐ Move the form to a new step

- 5) The current phase of the form is in green backfill. The name(s) of the process owner (whose inbox the form is in) will be listed in the box.
- 6) Determine which phase you want to send the form to and click on “**Move the form to a specific step**”.

**Form Title : 2012 ACES Form for James Bento** ( Doc Id: 34741 )

☐ Current step of selected forms 
 ☐ Target Step 
 ☐ Iterative Step 
 ☐ Collaboration Step 
 ☐ Step Owner

Current State	End State
1. Planning James Bento Mark Lanc... Due Date: 03/02/2012 <b>1 forms</b>	1. Planning James Bento Mark Lanc... Due Date: 03/02/2012
2. Progress ... James Bento Mark Lanc... Due Date: 05/07/2012	2. Progress ... James Bento Mark Lanc... Due Date: 05/07/2012

How do you want to route the form?

- ☐ Move the form one step forward
- ☐ Move the form one step back
- ☒ Move the form to a specific step

Move forms to the following step:

Select a step...

**Reason for changes:**

- ☒ Move form on behalf of James Bento, Mark Lancaster
- ☐ Skip step to continue the process

[Add comments](#) (optional)



- 7) At drop down menu **Move forms to the following step**:, select the step you want to move the form to.
- 8) Look at the screen to confirm that this is the stage you want to route the form to, which will be highlighted in blue.

Search for Forms > Select Forms > **Select An Action** > Summary

**Form Title : 2012 ACES Form for James Bento** ( Doc Id: 34741 )

☐ Current step of selected forms 
 ☐ Target Step 
 ☐ Iterative Step 
 ☐ Collaboration Step 
 ☐ Step Owner

Current State	End State
<b>1. Planning</b> James Bento Mark Lanc... Due Date: 03/02/2012 <b>1 forms</b>	<b>1. Planning</b> James Bento Mark Lanc... Due Date: 03/02/2012
<b>2. Progress ...</b> James Bento Mark Lanc... Due Date: 05/07/2012	<b>2. Progress ...</b> James Bento Mark Lanc... Due Date: 05/07/2012 <b>1 forms</b>
<b>3. Final Review</b>	<b>3. Final Review</b>

**How do you want to route the form?**

☐ Move the form one step forward  
☐ Move the form one step back  
☒ Move the form to a specific step

Move forms to the following step:

2. Progress Review

**Reason for changes:**

☒ Move form on behalf of James Bento, Mark Lancaster  
☐ Skip step to continue the process  
[Add comments](#) (optional)

☐ Move the form to a new step

- 9) At the bottom of the page, click on the **Next** button.
- 10) A message will appear confirming you have successfully routed the form (see sample below)

**Route Document**

Search for Forms > Select Forms > Select An Action > **Summary**

**You have successfully routed the forms. See the summary below**





**1 form(s) originally on step: "Planning" step**

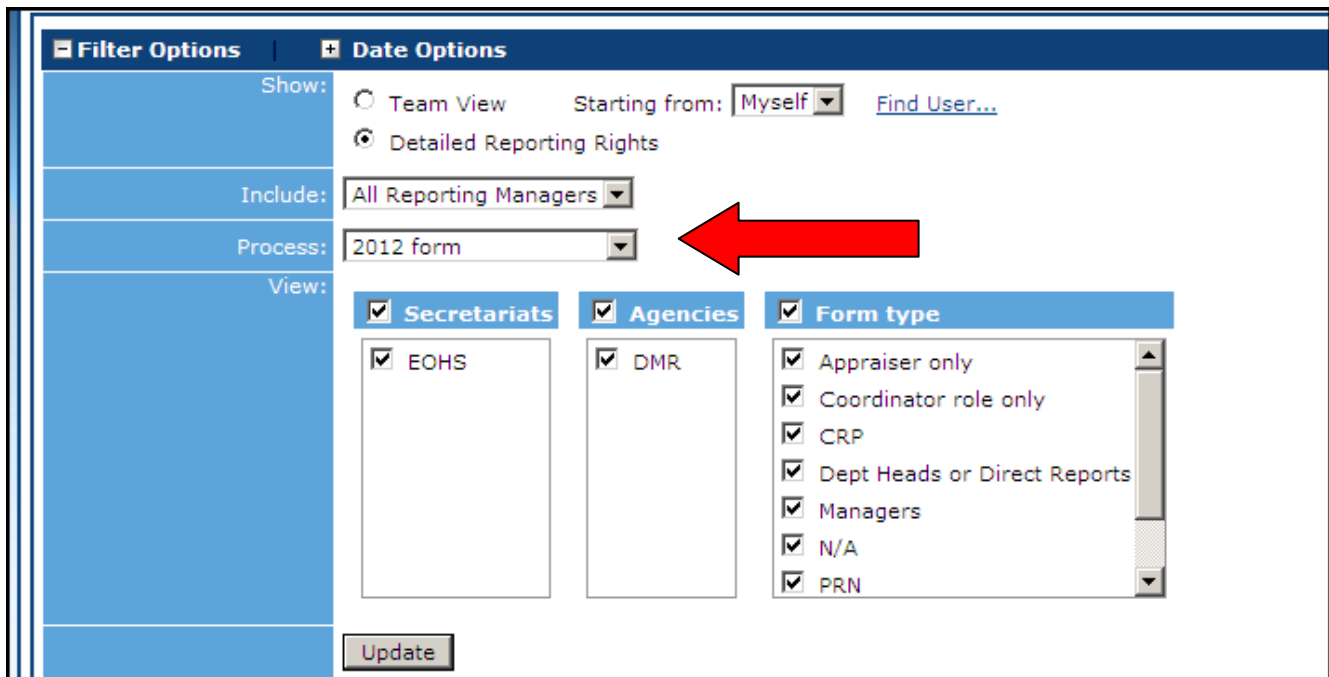
1 were moved to "Progress Review" step


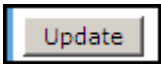

- 11) To route another document, click on **"Back to Search Forms"**.

## Accessing Document ID Numbers

A list of all current reporting manager Document IDs can be access through a Report entitled **List Views – Form List**.

- 1) Click on **Reports** 
- 2) Click on **List Views** 
- 3) Click on **Form List** 
- 4) Click + sign next to **Filter Options** , to open window. Ensure that the correct year's forms is selected under "Process"





- 5) Click + sign next to **Date Options** , to open window. Ensure that the correct year's form is selected under "Process". Ensure that **Current Year - Start Date** and **End Date** are accurate.
- 6) Click on **"Update button"**  to ensure you are getting the most updated information on forms.
- 7) Click + sign next to **Display Options** , to open window.


- 8) Select relative fields under **Display Options** window. Be sure to include **Document ID**. Below are some fields that you may find helpful in selecting.

The 'Display Options' window is divided into several sections. On the left is a 'Columns' list. To the right are five main categories, each with a sub-header and a list of fields with checkboxes:

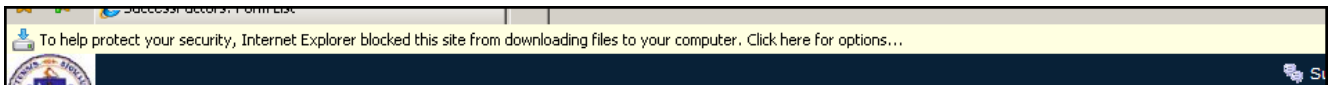
- Filter Info:**
  - ☒ Division
  - ☒ Department
  - ☐ Location
- Reporting Manager Info:**
  - ☐ Reporting Manager Name
  - ☒ Last Name
  - ☒ First Name
  - ☐ Middle Name
  - ☐ Username
  - ☒ Employee Id
  - ☐ Job Title
  - ☐ Email
  - ☒ Appraising Manager
  - ☐ HR Manager
  - ☐ Job Code
- Form Info:**
  - ☐ Source
  - ☒ Form Title
  - ☐ Form Template
  - ☒ Document Id
- Form Status:**
  - ☐ Current Stage
  - ☐ Currently With (name)
  - ☒ Current Step
  - ☐ Step Type
  - ☐ Completion Status
  - ☐ Due Date
  - ☐ Past Due/Not Yet Due
- Performance:**
  - ☒ Rating (Rounded)
  - ☐ Normalized Rating (Rounded)

- 9) Click on Generate Report  to run the report.

- 10) Under **Items per page**  be sure that you have chosen a number from the drop down to allow all of your reporting manager names to appear on the screen.

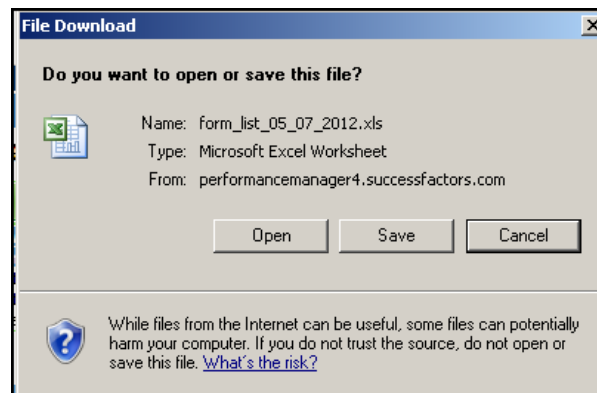
- 11) Select **Export to Excel**  to open Excel and export the reporting manager information into an Excel worksheet.

- 12) You may receive pop-up window at the top of your screen blocking you from downloading the file. Bring your cursor arrow so it is over the message, and right click with your mouse and click on "Download file".



- 13) Select again **Export to Excel** 

- 14) Click on "Open"



- 15) Once in Excel, be sure to save your worksheet after exporting it. Data in Excel can then be re-sorted as needed.