# ACES Administrative Delegated Access Manual

Authorized Access Required

**Table of Contents** **Page**

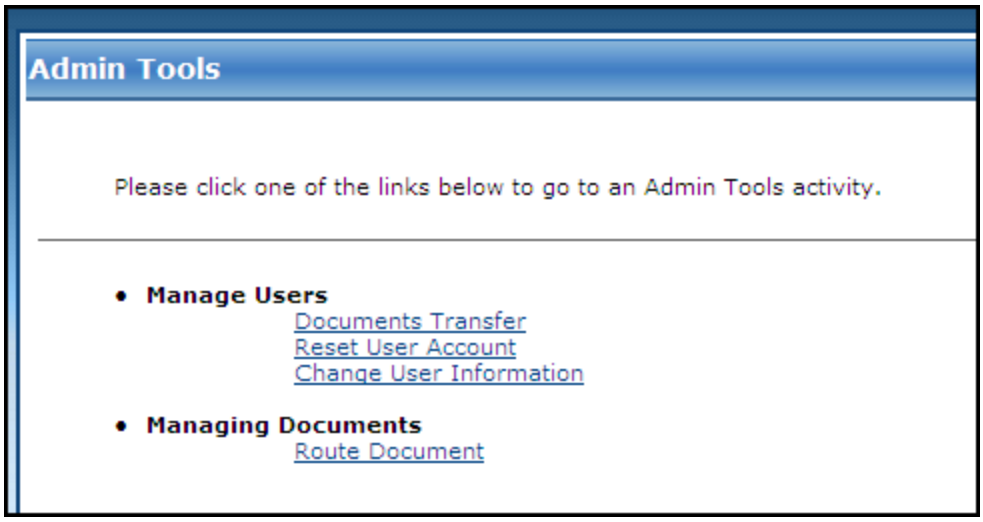

I. Documents Transfer: Changing Supervisors 2
II. Reset User Account: Unlocking an Account 3
III. Change User Information: Change email address, departments or ACES Coordinator 5
IV. Route document 7
V. Accessing Document ID Numbers 10


## 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:

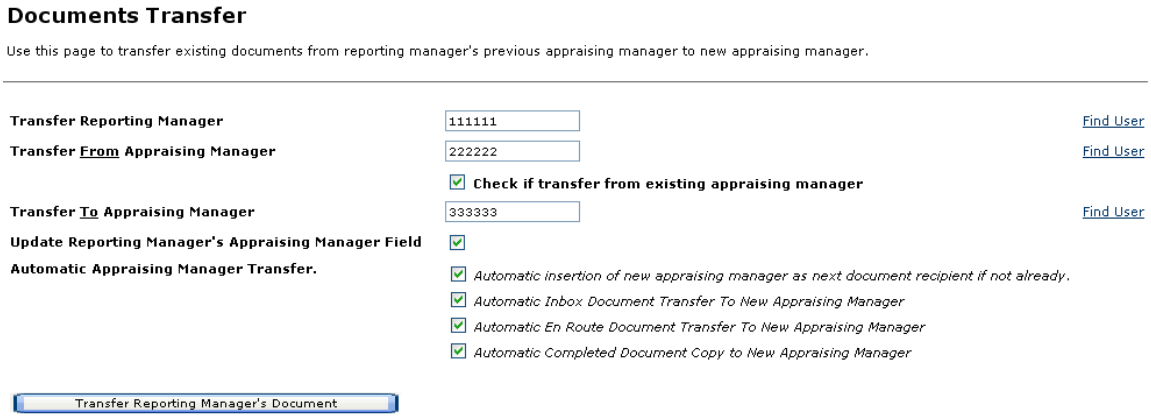


## Documents Transfer – Changing Supervisors

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




## Instructions

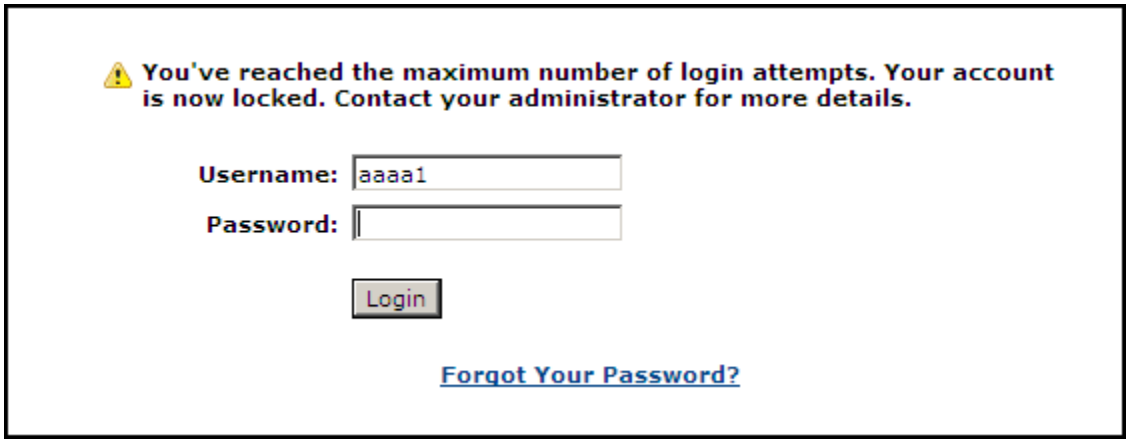
1) Research the user via the **Directory** button. Create a 3-column list.

| Rep Mgr | Former app mgr | New app mgr |
|---|---|---|
| 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.**

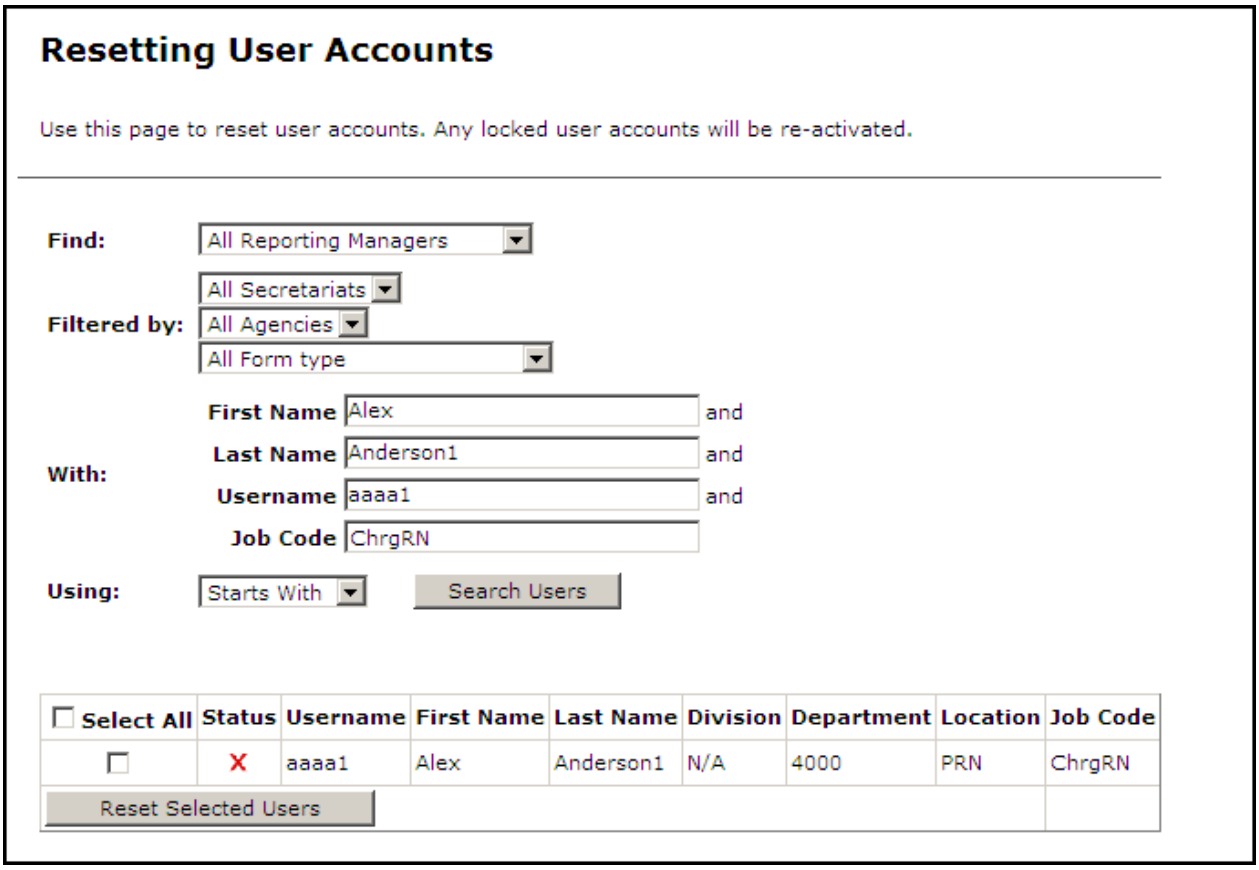
**Reset User Accounts: Unlocking an Account**

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.




Instructions

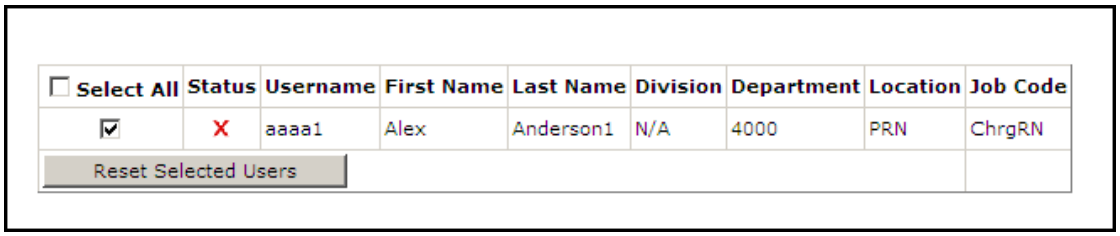
1) Click on **Admin Tools** button and **Reset User Account**
2) Do a search by last name or username (employee ID) and click **Search Users** button (see sample above)
3) If the account is locked, there is a red "x".



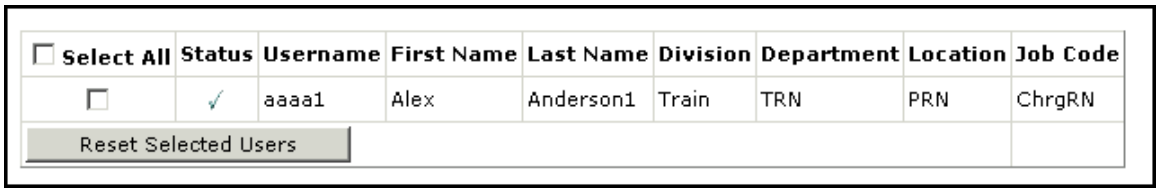
Instructions for Unlocking Accounts (continued)

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.

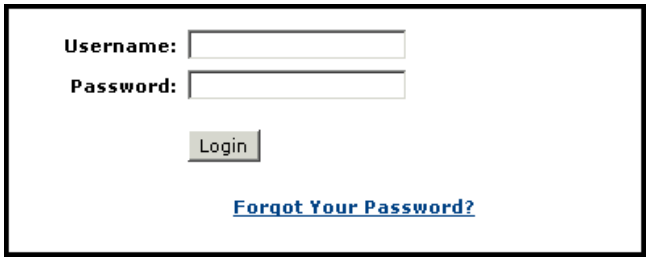



6) You can verify that the account is not locked by following steps 2 through 3 above. The user's account below is NOT locked, as there is a green check mark under the **Status** column.




## 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.

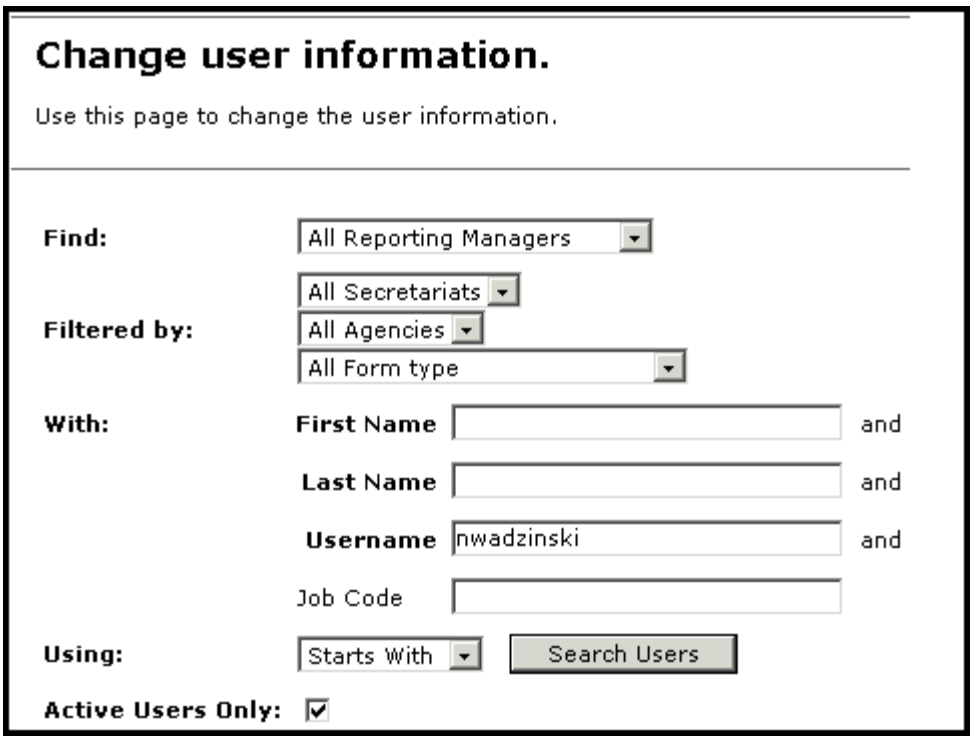


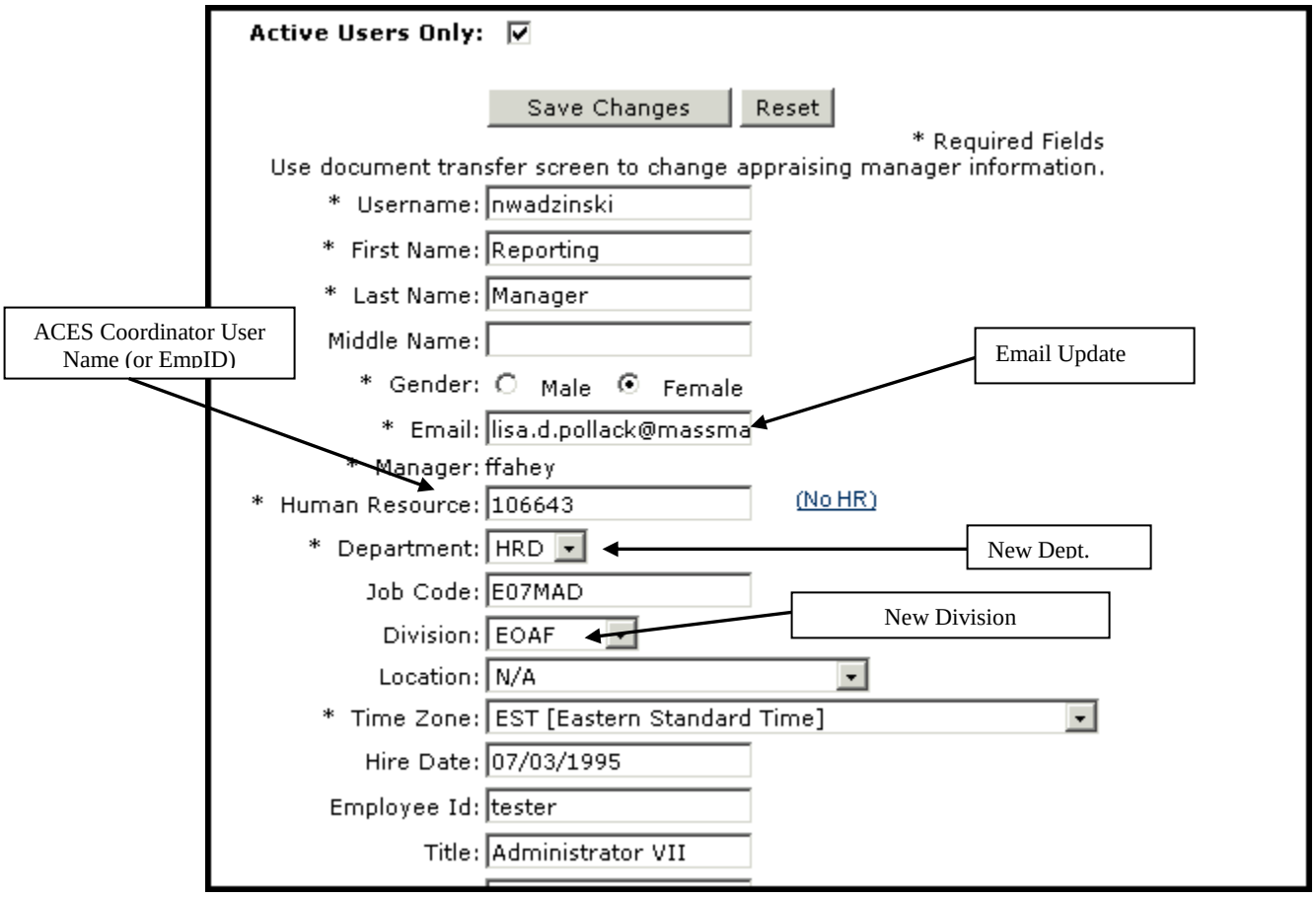

8) This brings you to another screen where you enter the username or employee ID. Click on "email me" and user should receive an email within a minute with their current login information.

| **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.



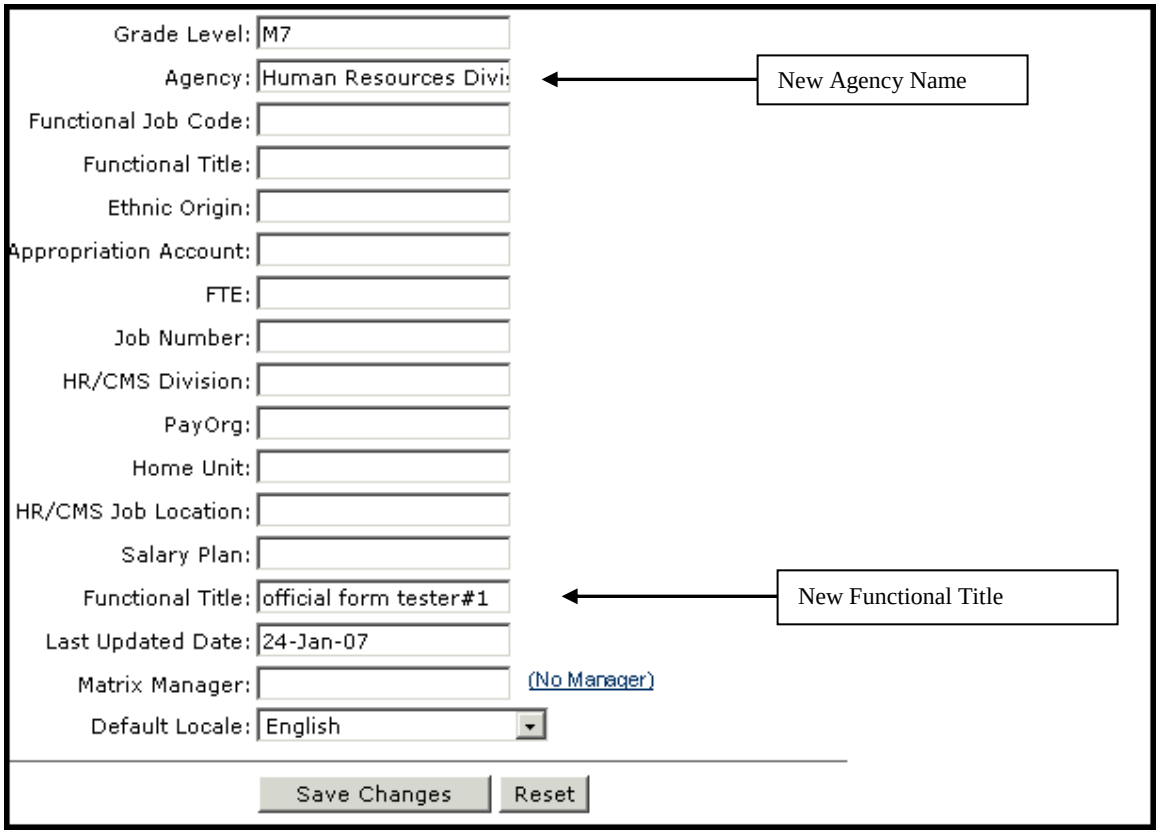
Instructions:

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.

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).




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.

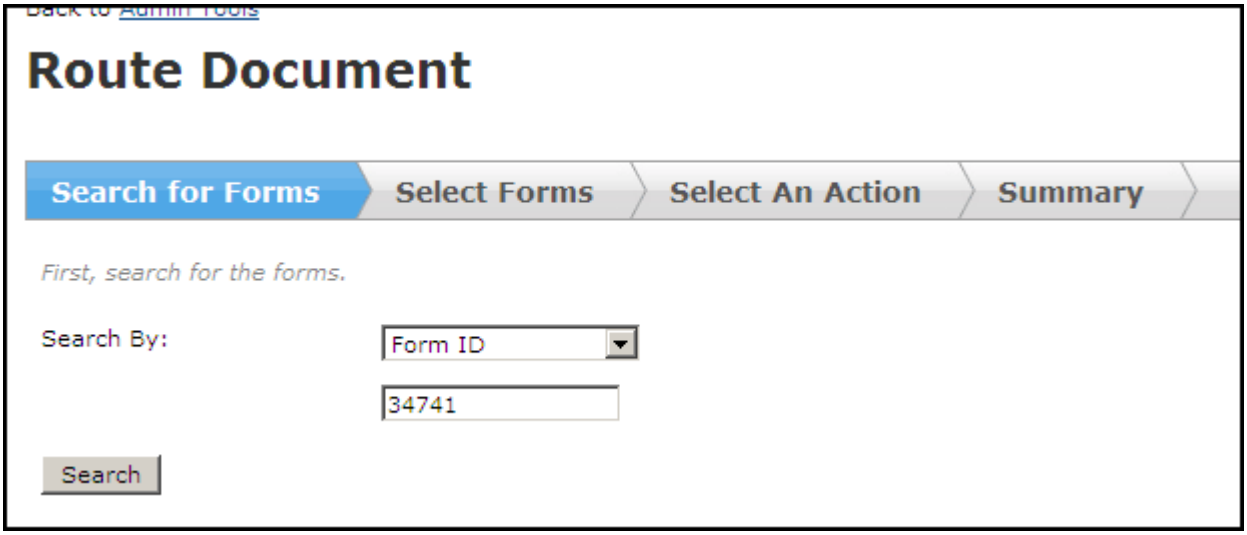
| | |
|---|---|
| **Important Note:** | Using Route Documents skips all the validation in the form (i.e., manager objectives adding up to 100%, between 2 and 4 Manager Objectives having been entered, at least one Career Growth Objective having been added, and progress and final ratings having been entered 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. |

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**

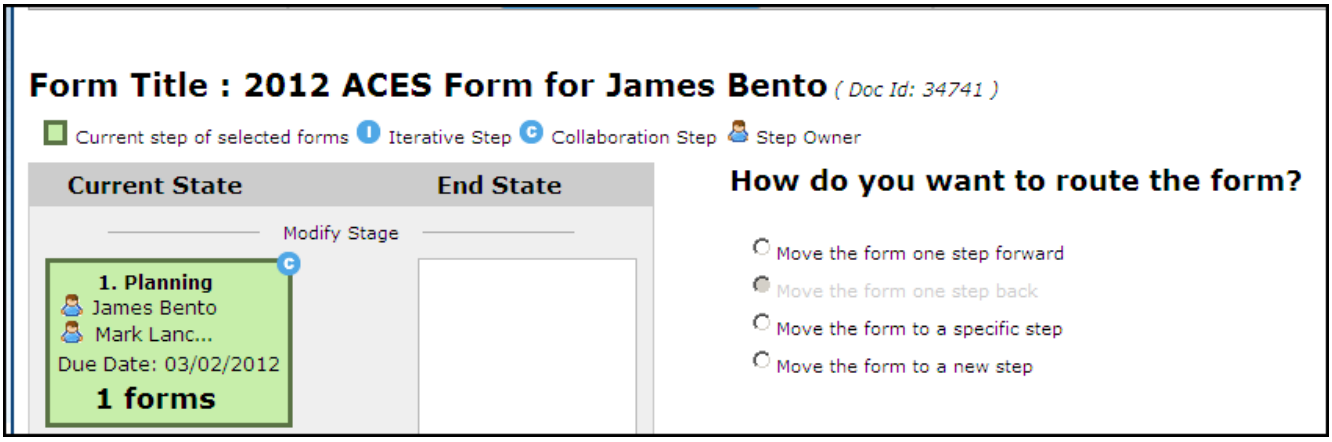
2) Enter the **Form ID/Document ID** and click on **Search.**

| | |
|---|---|
| **Note:** | To access Document IDs, see next section entitled Accessing Document ID Numbers |



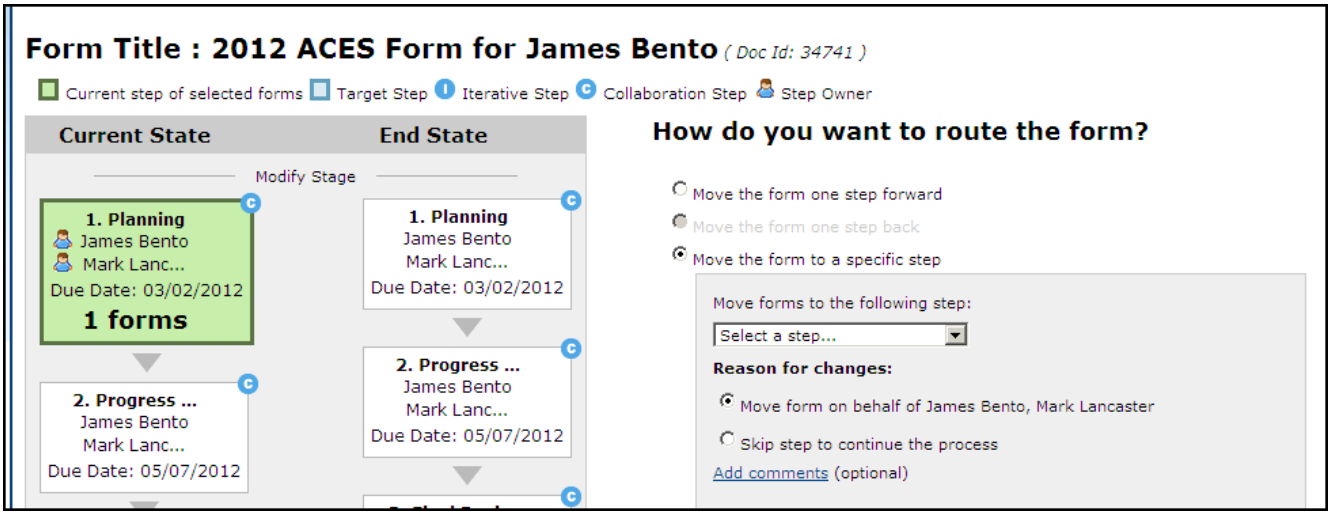
3) The screen below will appear. Confirm it is the correct form by looking at **form title** and verifying that the correct parties (reporting manager and appraising manager) are listed before pressing any buttons.

4) If have accessed the wrong form, click on the "back" button to navigate back to the **Route Document** page.




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".**



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.

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)

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.**

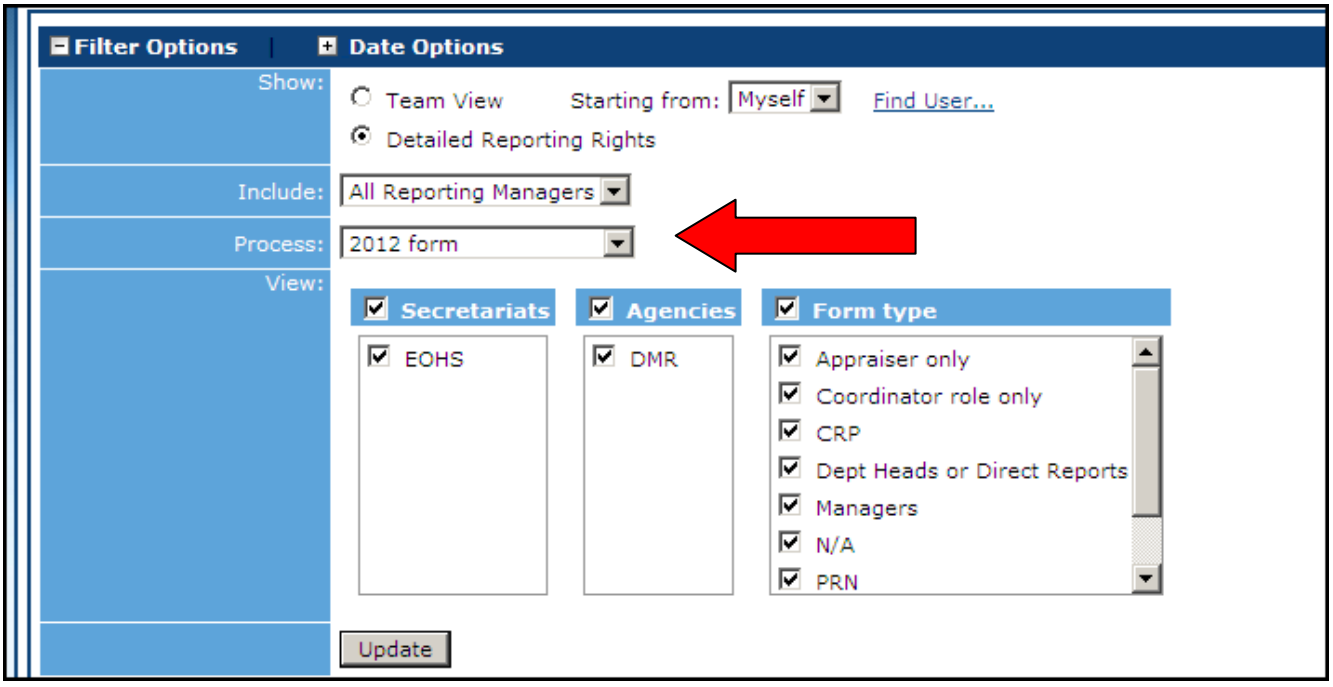
1) Click on **Reports**


2) Click on **List Views**


3) Click on **Form List**

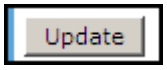

4) Click + sign next to **Filter Options**

, 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.

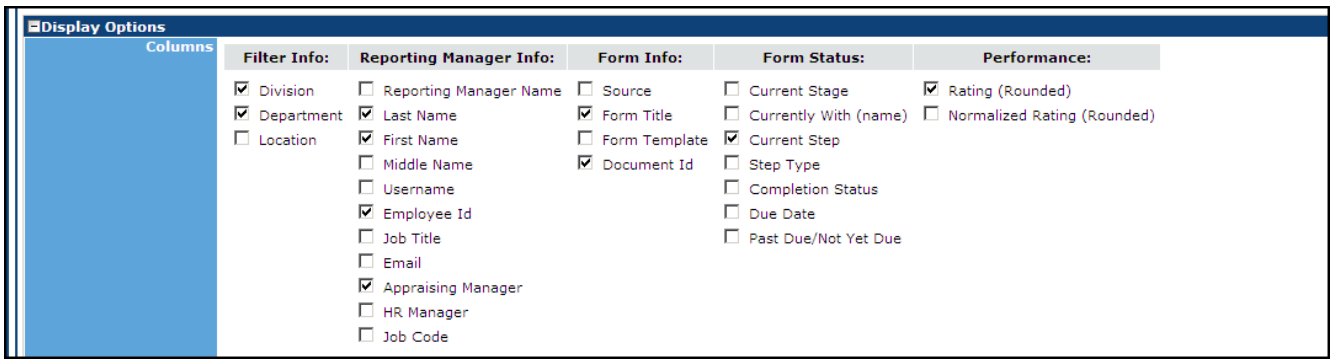
6) Click on **"Update button"** 

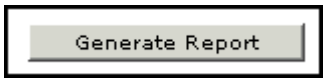
to ensure you are getting the most updated information on forms.

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.

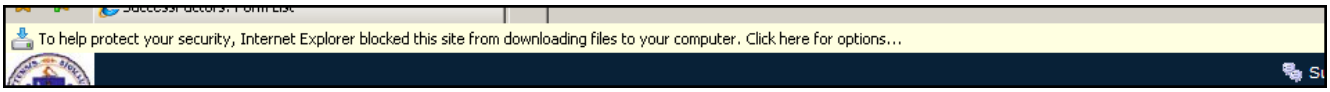



9) Click on Generate Report  to run the report.


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

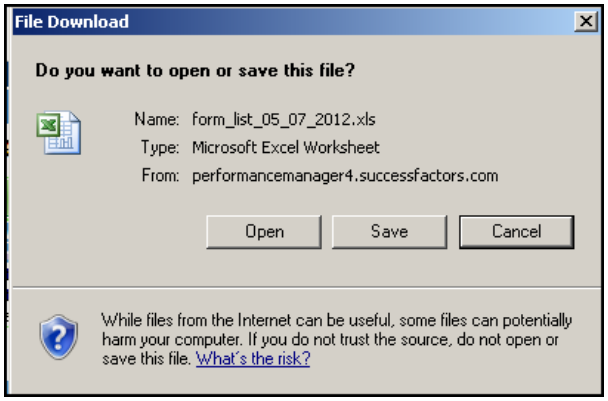

11) Select **Export to Excel** to open Excel and export the reporting manager information into an Excel worksheet.


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.