1) <u>Click</u> on **Reports**

2) <u>Click</u> on **Classic Reporting**

Classic Reporting	
These reports preserve the format of the original reports provided with	Reprint Ballis State Reprint Research State Second State State Spect Conjunct Company Company's New
this system. If you're already familiar with these reports, you can continue	
to use them as usual.	And publication of the second se
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3) Under Classic Reporting, click on Detailed Document Search

tab



- a) On **Detailed Document Search** page, <u>click</u> on **Detailed Search** radio button, ensure the following fields are selected:
 - o Under **Department** <u>select</u> departments
 - Under **Division** <u>select</u> your division
 - For Location: select
 - All Form types
- b) Ensure that Active Document Subjects Only is selected

Detailed Document Search				
Detailed Document Search Depending on the breadth of your query, the report may take several minutes to appear below. For document contents export process, it could ta documents in one report process is 999.				
Inbox for Reporting Mai Detailed Search: 'Detailed Search' is used to find d	der Search' is used to view the contents of a specific user's Inbox, En Route folder, or Completed folder.			
Department: Divisio Doc EOPS Active Document Subjects Only:	 ✓ Appraiser only ✓ Coordinator role only ✓ CRP ✓ Dept Heads or Direct Reports ✓ Managers ✓ N/A ✓ PRN 			

4) Under **Subject Username**, <u>enter</u> the **Employee ID** or if you don't know Employee ID, <u>click</u> on **Find User** to search the directory by last name and first name and <u>click</u> **Search** button, then <u>click</u> on **Select User**. This will input the employee ID number in **Subject Username** box as appears below.

Form creator Username:	Find User
Subject Username: 106643	Find User
Subject Job Code:	
Hire Date: From/On(MM/DD/YYY)); to(MM/DD/1111);

5) Under **Document Name**, <u>select</u> **All** to choose forms for all years or <u>select</u> **Other** and year form(s) that you are looking up. (Note: You can use Control key to select multiple year forms to access)

Document Name:	⊙ all		2004 ACES Review - Pilot 2005 ACES Executive Form 2005 ACES Form 2005 ACES Form (Final Review Mid Year Hire) 2006 ACES Executive Form
Document Name:	⊙ _{All}	O Other	2009 ACES Form

Document Name: All O Other 2009 ACES Form 2010 ACES Form 2011 ACES Form	
2011 ACES Form	
ZOTI ACES TOTI	
2012 ACES Form	
Confidential Survey for ACES Coordinators	

6) For Status, ensure that All is selected

Status:	All(Except Draft and Deleted)	
Document Ended:	From/On(MM/DD/1111): to	(MM/DD/1111):
Date Completed:	⊙ None	
	C Today	
	C From/On(MM/DD/YYYY):	to(MM/DD/1111):
	(When Date Completed is selected, results cont	tain only completed documents if any.)
Last Modified:	⊙ None	
	C Today	
	C From/On(MM/DD/YYYY):	to(MM/DD/1111);
Last Routed:	None	
	C Today	
	C From/On(MM/DD/YYYY):	to(MM/DD/1111):
Export File Format:	Microsoft's Excel	
	Open Export Options >>	
		Generate Report

7) Navigate to bottom of page and <u>click</u> on **Generate Report**

Generate Report button.

8) Form(s) will appear. <u>Click</u> on hyperlink to access the form.

Document Information Button

1) After generating a form, once accessing it in steps above, you can <u>click</u> on **Document Information** button to find out:

- the tracking history of a form
- what is the current stage of the form
- who form is currently with

The **Comments Section** also lists any email content that the person wrote before routing the form. If document was routed through administrative tools, it will also be listed here.

2) <u>Click</u> on X at top right hand top of screen to close the **Document Information** window.