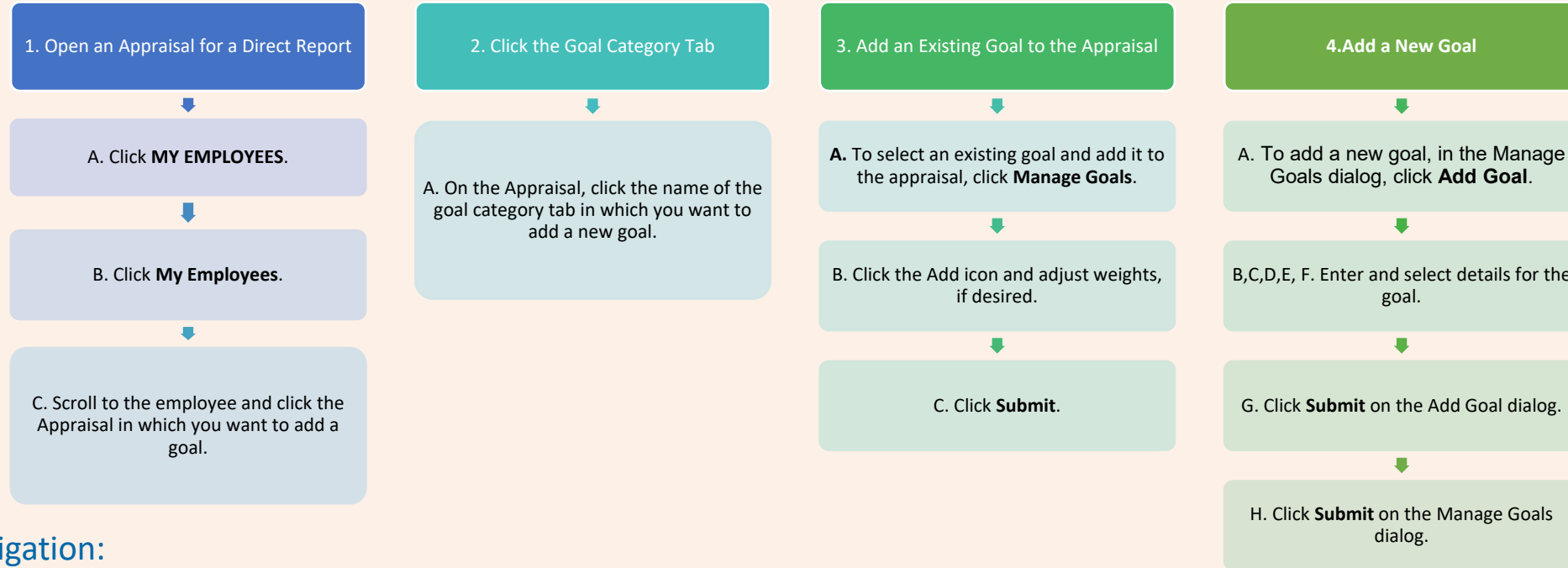


Add a Goal Within an Appraisal Quick Steps

The high-level steps required for a manager to add a goal within an appraisal are shown here. Each step includes sub-steps.



Navigation:

- Use the **Page Down** key to proceed through the quick steps.
- Use the **Page Up** key to return to a prior slide.

A

Click MY EMPLOYEES.

B

Click My Employees.



Kathryn Admin
KC - Site Administrator

PB:
Creative Front Office
KC - Creative Main Office

APPRAISALS

CURRENT PHASE

SCORE

PHASE END DATE



★ Annual Appraisal

Performance

Incomplete

Expand



APPRAISALS

CURRENT PHASE

SCORE

PHASE END DATE



★ Reine

Planning

Incomplete

5/18/2020

Workflow

Planning

Incomplete

5/18/2020

Kathryn Admin
KC - Site Administrator

PB:
Creative Front Office
KC - Creative Main Office

Expand ▼



Reine Admin

PB:
Accounting / Finance
RT Hotel 5*

APPRAISALS

CURRENT PHASE

SCORE

PHASE END DATE



★ Reine

Planning

Incomplete

5/18/2020

★ Reine's Workflow

C

Click **Reine's Workflow**.

Planning

Incomplete

5/18/2020

★ Mars wf full 2 Approvals

Incomplete

More...

Expand ▼



Epepito Administrator

PB:

APPRAISALS

CURRENT PHASE

SCORE

PHASE END DATE



★ Mars wf full really

Planning

Incomplete

★ EM - EPM Workflow

Planning

Incomplete

★ JMC Workflow I

Planning

Incomplete

Expand ▼

1. Open an Appraisal for a Direct Report > Step C

Reine's Workflow

for Reine Admin

This appraisal is ready to move to the next phase.

Move to the Next Phase

This demonstration shows a manager adding a goal to an employee's appraisal. Depending on permissions, Employees can also add a goal to their appraisal. Depending on how the **Require Employee Goal Approval** option is configured in System Settings (Administration » Global Settings » System Administration » System Settings » Appraisals), a Manager may need to approve goals added by an employee.

APPRAISAL INFORMATION

CORE COMPETENCIES (33.34%)

JOB COMPETENCIES (33.33%)

SALES (33.33%)

CONTINUOUS FEEDBACK

SUMMARY

SUPPORT INFORMATION (GLOBAL ADMIN ONLY)

Step 1

Planning

Step 2

Performance

Step 3

Assessment

Review

A

Click the tab for the goal category in which you want to add a goal. We'll click the **Sales** goal category.

Signature Log

Phase Signature Requirements

1. ~@epm_workflow_phase_06540b2b5a8712538a338983b2cb8218@~ (No signatures are required)
2. ~@epm_workflow_phase_188e60b3583102d056f986c879fef540@~ (No signatures are required)
3. ~@epm_workflow_phase_500b438667e2bbf2545516ac4055b60d@~ (No signatures are required)
4. ~@epm_workflow_phase_1679d3b2d62023@~ (No signatures are required)

2. Click the Goal Category tab > Step A

Reine's Workflow

for Reine Admin

This appraisal is ready to move to the next phase.

Move to the Next Phase

This tab displays details about goals previously added, either by an Administrator via the Performance Workflow, or by a Manager or an Employee, from within the appraisal.

APPRAISAL INFORMATION

CORE COMPETENCIES (33.34%)

JOB COMPETENCIES (33.33%)

SALES (33.33%)

CONTINUOUS FEEDBACK

SUMMARY

SUPPORT INFORMATION (GLOBAL ADMIN ONLY)

Sales (100.00%)

Collapse All Notes

Manage Goals

A
Click **Manage Goals**.

Secure 2 Verified Leads for your Pipeline (100.00%)

Add at least 2 qualified leads to your pipeline by the end of Q4.

GOAL SCORE TYPE	Percentage Complete
PRIVATE	No
START DATE	

Reine's Workflow

for Reine Admin

This appraisal is re

Move to the Next

APPRAISAL INFO

SUPPORT INFO

Sales (100.00

Secure 2 Verif

Add at least 2 qu

GOAL SCORE TY

PRIVATE

START DATE

Manage Goals

Add Goal

Available Items

Goal 1 (No Score) ⓘ



Goal 3 (Percentage Complete) ⓘ



Goal 5 (Complete/Incomplete) ⓘ



Selected Items

Goal 2 (Scale) ⓘ

Weight

50.00

%



Weight

50.00

%



Total Weight

100.00

Submit

Cancel

Close Window

To simply add additional goals within the category, click the add icon in the Available Items section.

B

Click the Add icon.

2. Add an Existing Goal to the Appraisal > Step B

This app

Move to

APPR

SUPPO

Sales (

Secur

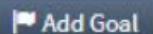
Add at

GOAL

PRIV

START

Manage Goals

 Add Goal

A

Click Add Goal.

Available Items

Goal 3 (Percentage Complete) 

+

Goal 5 (Complete/Incomplete) 

+

Selected Items



 Goal 2 (Scale) 

Weight

33.34

%

x



 Goal 4 (Numerical) 

Weight

33.33

%

x

 Goal 1 (No Score) 

Weight

33.33

%

x

Total Weight

100.00

Submit

Cancel

Close Window

If you were adding just the existing goal, Goal 1, you would click **Submit** below to complete the process. We will continue this demo by adding a new goal, first.

The goal is added to the Selected Items section and the weights of all goals are equally distributed to add to a total weight of 100. Modify the weights, if desired.

Add Goal

Add Goal

You can add a new goal by clicking one of the options in the IMPORT section to copy details from an existing goal, or by adding a goal from scratch. We will add a goal from scratch.

[Show Instructions](#)

IMPORT

[Browse Library](#)

[Browse Manager](#)

[Goals](#)

[Browse Manager's](#)

[Direct Reports](#)

[Browse Employee](#)

[Past Appraisals](#)

B

Enter a **Goal Name**.

GOAL NAME *

Complete Certification

GOAL SCORE TYPE *

-- Select --



SMART goals need to be **S**pecific. To make

goals specific, they must indicate exactly what is going to be accomplished, why it is important, and who is to be involved. A specific goal will usually answer the following questions:

- What: What do I want/need to accomplish? Include requirements and constraints.
- Why: Why is this goal beneficial and purposeful?
- Who: Who is involved?

Close Window

Add Goal

Add Goal

[Show Instructions](#)

IMPORT

[Browse Library](#)

[Browse Manager](#)

[Goals](#)

[Browse Manager's](#)

[Direct Reports](#)

[Browse Employee](#)

[Past Appraisals](#)

GOAL NAME *

Complete Certification

GOAL SCORE TYPE *

No Score



SMART goals need to be Specific. To make

goals specific, they must indicate exactly what is going to be accomplished, why it is important, and who is to be involved. A specific goal will usually answer the following questions:

- What: What do I want/need to accomplish? Include requirements and constraints.
- Why: Why is this goal beneficial and purposeful?
- Who: Who is involved?

C

Enter a **Goal Score Type**.

Close Window

Add Goal

Goals

Browse Manager's

Direct Reports

Browse Employee

Past Appraisals

GOAL NAME *

Complete Certification

GOAL SCORE TYPE *

No Score

DESCRIPTION *

B

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U

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🔗

🔗

Complete 6-week course before end of year.

D

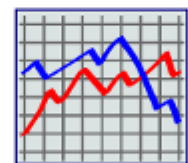
Enter a **Description**.



SMART goals need to be Specific. To make

goals specific, they must indicate exactly what is going to be accomplished, why it is important, and who is to be involved. A specific goal will usually answer the following questions:

- What: What do I want/need to accomplish? Include requirements and constraints.
- Why: Why is this goal beneficial and purposeful?
- Who: Who is involved?



A Measurable goal stresses the need for

concrete criteria for measuring progress toward the attainment of the goal. It also discusses what success looks like once the goal is completed. A measurable goal will usually answer questions such as:

Close Window

This app

Move to

APPRO

SUPPO

Sales (

Secur

Add at

GOAL

PRIVA

START

Add Goal



START DATE

TARGET DATE

Goals can be associated to one another, which can help employees see how their contributions affect larger, strategic objectives. Browse and choose another goal that this goal should be associated with. The new goal will be a part of any group the related goal was already a part of.

RELATED GOAL

as:

- What milestones will be set to keep my progress towards the goal on track?
- How will I know when it is accomplished?
- What will success look like (via measurement) once this goal is accomplished?



E

Select a **Start Date** for when the employee begins work on the goal, and a **Target Date** for when the goal is expected to be complete.

goals are difficult, yet not out of reach

performance. They should require the employee to develop new skills and competencies in order to achieve the goal. An attainable goal will usually answer

- Is this goal difficult yet realistic?
- What new skills or competencies will I need to acquire in order to achieve this goal?

Close Window

Add Goal



Goals can be associated to one another, which can help employees see how their contributions affect larger, strategic objectives. Browse and choose another goal that this goal should be associated with. The new goal will be a part of any group the related goal was already a part of.

RELATED GOAL

 Browse

Goals are public by default to encourage employees to relate goals and work together to meet organizational objectives. Scores and ratings are never publicly visible but other employees can see goals and descriptions. This is not always desirable, and you can choose to keep this goal private from others not directly involved with this appraisal by selecting the private option.

☐ Private

nor below standard performance. They should require the employee to stretch and develop new skills and competencies in order to achieve the goal. An attainable goal will usually answer the following questions:

- Is this goal difficult yet realistic?
- What new skills or competencies will I need to acquire in order to achieve this goal?



F

- **Related Goal:** Click **Browse** to link this goal to another goal, perhaps one with the same larger strategic objective.
- **Private:** Click to mark the goal private, which hides it from users who are not directly involved with any appraisal the goal may be linked with at a later date. Scores and ratings are always private, regardless of this option.

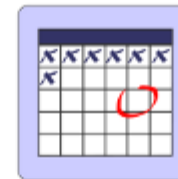
Close Window

Add Goal



department and individual?

- Is this the right time to pursue this goal?
- Does this goal align with our organization's key priorities/strategy?
- Am I the right individual to accomplish this goal?



Time-bound goals are set within a time frame,

giving them a target date. A commitment to a deadline helps focus efforts on completion of the goal on or before the due date. A time-bound goal will usually answer the question:

- When is this due, or when must this be completed/implemented?

Submit

Cancel

G

When finished adding a new goal, click **Submit**.

Close Window

Reine's Workflow

for Reine

This app

Move to

APPRO

SUPPO

Sales (

Secur


Add at

GOAL

PRIV

START

Manage Goals

 Add Goal

Available Items

Goal 3 (Percentage Complete) 

+

Goal 5 (Complete/Incomplete) 

+

Selected Items



 Goal 2 (Scale) 

Weight

25.00

%

×

 Goal 4 (Numerical) 

Weight

25.00

%

×

 Goal 1 (No Score) 

Weight

25.00

%

×

 Complete Certification 

Weight

25.00

%

×

Total Weight

100.00

H

When finished managing goals, click **Submit** on the Manage Goals dialog.

Submit

The goal is added to the Selected Items section of the Manage Goals dialog and the weights of all goals are equally distributed to add to a total weight of 100. Modify the weights, if desired.

General Appraisal Notes

There are no journal entries.

Complete Certification (25.00%)

Complete 6-week course before end of year.

GOAL SCORE TYPE No Score

PRIVATE No

START DATE 4/25/2020

TARGET DATE 12/31/2020

COMPLETION DATE

GOAL STATUS N/A

RELATED GOAL [Browse](#)

Details of the new goal display beneath any previously existing goals. Note that from this screen, depending on permissions, a Manager may have access to other Actions, such as **Add Journal Entry**, **Edit**, **Cascade**, **Retire Goal**, and **Delete** a goal.

If Talent Management is configured to **Require Employee Goal Approval**, after an Employee adds a goal, the Manager will see an option to accept or reject the goal on this screen.

[Add Journal Entry](#)



ACTIONS

[Add Journal Entry](#)

[Edit](#)

[Cascade](#)

[Retire Goal](#)


[Delete](#)

General Appraisal Notes

There are no journal entries.

[Add Journal Entry](#)

General Appraisal Notes

 Add Journal Entry

There are no journal entries.

Complete Certification (25.00%)



Complete 6-week course before end of year.

GOAL SCORE TYPE

No Score

PRIVATE

No


START DATE

TARGET DATE


COMPLETION DATE


GOAL STATUS


RELATED GOAL

 Browse

ACTIONS

 Add Journal Entry

 Edit


 Cascade

 Retire Goal

 Delete

This concludes the Add a Goal Within an Appraisal quick steps.

General Appraisal Notes

 Add Journal Entry

There are no journal entries.