

Create Employee Goals

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View Goals on the Employee Goals Screen from the Manager and Employee View

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In this click-thru, you will learn how to create Employee Goals as an Employee and a Manager via Continuous Employee Goal Management.

Click the numbered circles on the left to move to the first step in each phase.

Use the arrow keys or PgUp/PgDn keys to move through each step and sub-step.

Begin

Best viewed in IE or Adobe PDF Reader.

Overview of Employee Goals



- » Employees and Managers can add goals outside of the Appraisal Workflow Process on the Employee Goals screen, as part of Continuous Employee Goal Management:
 - » Employees can create goals (**Performance >> My Goals**)
 - » Managers can create and manage goals for direct reports (**My Employees >> My Employees >> Click Goals from an employee's Action menu**)

Click the numbered circles to move to the first step in each phase.

Use the arrow keys or PgUp/PgDn keys to move through each step and sub-step.

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Main Dashboard

Get More Widgets

A
Click Performance.

B
Click My Goals.

Click the numbered circles to move to the first step in each phase.

Use the arrow keys or PgUp/PgDn keys to move through each step and sub-step.

Create Employee Goals

My Employees / My Employees

Employee Goals

Reine Hiring Manager

Filter

No Employee Goal.

Create Employee Goal

C

Click **Create Employee Goal**.

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Employee Goals

Create New Employee Goal

IMPORT

EMPLOYEE

Reine Hiring Manager

GOAL NAME *

GOAL SCORE TYPE *

-- Select --

DESCRIPTION *

B I U [List Icons] [Link Icon]

[Text Area]

Depending on configuration and access rights, you may have options for creating goals from existing goals. These options would display in the Import section. Regardless of the method you choose, follow the tips provided to create goals that meet the SMART (Specific, Measurable, Attainable, Relevant, Time-bound) standard.

This user does not have access to import goals. We'll demonstrate adding a goal from scratch.

View All



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:

D Enter a **Goal Name**.
What: What do I want/need to accomplish? Include requirements and constraints.
Why: Why is this goal beneficial and purposeful?
Who: Who is involved?

E Click the **Goal Score Type** drop-down and select a score type, such as **Percentage Complete** or **No Score**.
How: How will I know when it is accomplished?
When: When will I accomplish this goal?
Where: Where will I accomplish this goal?
What: What are the concrete criteria for measuring progress?

F Enter a short **Description**.
What: What does the attainment of the goal look like once it is accomplished?
Why: Why is this goal important?
Who: Who is involved?
When: When will I accomplish this goal?
Where: Where will I accomplish this goal?
What: What will success look like (via measurement) once this goal is accomplished?
How: How will I know when it is accomplished?
When: When will I accomplish this goal?
Where: Where will I accomplish this goal?

Create Employee Goals



START DATE

TARGET DATE

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

I If desired, check **Private** to hide the goal from users who are not directly involved with any appraisal the goal may be linked to at a later date. Scores and ratings are always private, regardless of this option.

G Enter a date to begin work on the goal in the **Start Date** field.

H Enter the date you anticipate completing the goal in the **Target Date** field.



Creating Relevant goals means choosing goals that are relevant

and align to the organization, department and employee's success and development. A relevant goal can answer yes to these questions:

- Does this seem worthwhile/necessary to the organization, 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?

Click the numbered circles to move to the first step in each phase.

Use the arrow keys or PgUp/PgDn keys to move through each step and sub-step.

Create Employee Goals



Click the numbered circles to move to the first step in each phase.

Use the arrow keys or PgUp/PgDn keys to move through each step and sub-step.

START DATE

TARGET DATE

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

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?



Creating **Relevant** goals means choosing goals that are relevant

and align to the organization, department and employee's success and development. A relevant goal can answer yes to these questions:

- Does this seem worthwhile/necessary to the organization, 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:

Can I complete this goal by the due date?

J Click **Submit** when finished.

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Use the arrow keys or PgUp/PgDn keys to move through each step and sub-step.

Jobs Search...

View Employee Goal

View All Edit More Options

EMPLOYEE
Reine Hiring Manager

START DATE
7/31/2019

GOAL NAME
Complete Certification

TARGET DATE
12/31/2019

GOAL SCORE TYPE
No Score

PRIVATE

DESCRIPTION
Complete online Leadership certification by end of

APPRAISALS

There is no data to display.

- Change Status
- Retire Goal
- Delete

The Employee Goal is added. You can click **View All** to return to the Employee Goals screen. You can also click **Edit** to make changes, or click **More Options** to **Change Status**, **Retire Goal** or **Delete** the goal. If your Manager created the goal for you, you would not have access to **Edit**, **Retire Goal**, or **Delete**.

Next we'll demonstrate how a Manager adds an Employee Goal for a direct report. We'll be logged in as the Manager of the Employee we used in Step 2.

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Dashboard

Employees Search...

MY EMPLOYEES

My Employees

9 Box

A
Click MY EMPLOYEES.

B
Click My Employees.

This screen demonstrates the Dashboard after the Manager has logged into Deltek Talent Management.

Alerts

- Position Assistance Requests (10)
- Score this Appraisal - Appraisal (Mars WF Easy LALA) Mars Admin

Show All

Empty widget area with dashed border

Click the numbered circles to move to the first step in each phase.

Use the arrow keys or PgUp/PgDn keys to move through each step and sub-step.

Create Employee Goals



Main Menu

My Employees Employees Search...

MY EMPLOYEES

My Employees

9 Box

My Employees

Performance

Displaying 1 - 7 of 7 10 25 50



No appraisals for this employee.

Reine Hiring Manager
RT - Hiring Manager

PB:
Human Resources
RT Hotel 5*

- ACTIONS
 - Continuous Feedback
 - Goals
 - Create New Appraisal
 - View TTP

Locate the direct report and click the Actions drop-down menu to expand options.

Click Goals.

Click the numbered circles to move to the first step in each phase.

Use the arrow keys or PgUp/PgDn keys to move through each step and sub-step.

Create Employee Goals



Deltek Talent Management

Application Development Testing Company English

Employees Search...

My Employees / My Employees

Employee Goals

Reine Hiring Manager

Create Employee Goal

Filter

« < 1 > »

GOAL NAME	PROGRESS	START DATE	TARGET DATE	COMPLETION DATE	STATUS	ACTIONS
Complete Certification	0	31/7/2019	31/12/2019	None		

E Click Create Employee Goal.

Note that the Employee Goal that the Employee added in Step 2 displays in the grid.

Click the numbered circles to move to the first step in each phase.

Use the arrow keys or PgUp/PgDn keys to move through each step and sub-step.

Create Employee Goals



Click the numbered circles to move to the first step in each phase.

Use the arrow keys or PgUp/PgDn keys to move through each step and sub-step.

My Employees / My Employees

Employee Goals

Create New Employee Goal

IMPORT

Browse Library

Browse Manager Goals

Browse Manager's Direct Reports

Browse Employee Completed Goals

EMPLOYEE

Kathryn Admin

GOAL NAME *

GOAL SCORE TYPE *

-- Select --

DESCRIPTION *

Depending on configuration and access rights, a Manager may have options for creating goals from existing goals. Options can include copying goals from the Goals Library, from your Manager, from a Manager's direct reports, or from your past completed goals. Regardless of the method you choose, follow the tips provide to create goals that meet the SMART (Specific, Measurable, Attainable, Relevant, Time-bound) standard.

View All

We'll demonstrate copying a goal from the Goals Library.

F

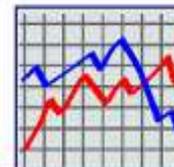
Click **Browse Library**.



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

Create Employee Goals



Employees Search...

Browse Library

- Complete Continuing Education Course - Scale
Enroll and complete a continuing education course related to your field.
- Customer Driv
Support and con

Click a goal to copy all the goal's details to the Create New Employee Goal screen.

Close Window

Click the numbered circles to move to the first step in each phase.

Use the arrow keys or PgUp/PgDn keys to move through each step and sub-step.



A Measurable goal stresses the need for concrete criteria

Create Employee Goals



GOAL NAME *

GOAL SCORE TYPE *

Scale

DESCRIPTION *

B *I* U [List] [Bulleted] [Table] [Table] [Link] [Unlink]

Enroll and complete a continuing education course related to your field.

All details except dates are copied to the new goal. Add dates and make additional changes, as desired.

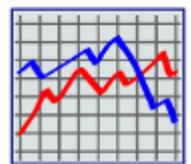
START DATE

H Enter a **Start Date** for the goal.

TARGET DATE

I Enter a **Target Date** for when the goal should be complete.

- 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:

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



Attainable goals are difficult, yet not out of reach 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?

Click the numbered circles to move to the first step in each phase.

Use the arrow keys or PgUp/PgDn keys to move through each step and sub-step.

Create Employee Goals



group the related goal was already a part of.

RELATED GOAL

Browse

Goals are public by default and work together to... 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

J

If desired, click **Browse** to link this goal to another goal, perhaps one with the same larger strategic objective.

K

If desired, check **Private** to hide it from users who are not directly involved with any appraisal the goal may be linked to at a later date. Scores and ratings are always private, regardless of this option.



Creating Relevant goals means choosing goals

that are relevant and align to the organization, department and employee's success and development. A relevant goal can answer yes to these questions:

- Does this seem worthwhile/necessary to the organization, 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:

L

Click **Submit** when finished.

Submit

Cancel

...be completed/implemented?

Click the numbered circles to move to the first step in each phase.

Use the arrow keys or PgUp/PgDn keys to move through each step and sub-step.

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My Employees / My Employees

View Employee Goal

The Employee Goal is added for the direct report, Reine Hiring Manager. You can click **View All** to return to the Employee Goals screen, click **Edit** to make changes, or click **More Options** to **Change Status, Retire Goal** or **Delete** the goal.

[View All](#) [Edit](#) [More Options](#)

A
Click **View All** to view this goal and the one created in Step 2.

EMPLOYEE	START DATE
Reine Hiring Manager	7/30/2019
GOAL NAME	TARGET DATE
Complete Continuing Education Course	12/31/2019
GOAL SCORE TYPE	RELATED GOAL
Scale	Browse
DESCRIPTION	PRIVATE
Enroll and complete a continuing education course related to your field.	No
APPRAISALS	

There is no data to display.

Click the numbered circles to move to the first step in each phase.

Use the arrow keys or PgUp/PgDn keys to move through each step and sub-step.

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My Employees / My Employees

Employee Goals

Reine Hiring Manager

Create Employee Goal

Both goals created in Step 2 and Step 3 display in the grid.

Filter

« < 1 > »

Displaying 1 - 2 of 2 10 25 50 100 per page

GOAL NAME ▾	PROGRESS ▾	START DATE ▾	TARGET DATE ▾	COMPLETION DATE ▾	STATUS ▾	ACTIONS
Complete Certification	0	31/7/2019	31/12/2019	None		   
Complete Continuing Education Course	0	31/7/2019	31/12/2019	None		   

Note that the Manager has access to all Actions, such as **Edit**, **Change Status**, **Retire Goal** and **Delete**. Manager access to these Actions is determined by the code and cannot be modified by an Administrator.

Let's log in as the Employee and jump to the Employee view of this screen (**Performance >> My Goals**) to view Actions available for the Employee.

Click the numbered circles to move to the first step in each phase.

Use the arrow keys or PgUp/PgDn keys to move through each step and sub-step.

Create Employee Goals



Dashboard

Jobs ▾ Search... 🔍



RECRUITING

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My Goals

Continuous Feedback

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CAREER CENTER

Main Dashboard

This screen demonstrates the Dashboard after the user, Reine Hiring Manager, has logged into Deltek Talent Management.

Get More Widgets

B Click Performance.

C Click My Goals.

Click the numbered circles to move to the first step in each phase.

Use the arrow keys or PgUp/PgDn keys to move through each step and sub-step.

Create Employee Goals



Click the numbered circles to move to the first step in each phase.

Use the arrow keys or PgUp/PgDn keys to move through each step and sub-step.

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Employee Goals

Both goals created in Step 2 and Step 3 display in the grid.

Create Employee Goal

Filter

« < 1 > »

Note that for the goal created by the Employee, all Actions are available.

Displaying 1 - 2 of 2 10 25 50 100 per page

GOAL NAME	PROGRESS	START DATE	TARGET DATE	COMPLETION DATE	STATUS	ACTIONS
Complete Certification	0	7/31/2019	12/31/2019	None		
Complete Continuing Education Course	0	7/31/2019	12/31/2019	None		

For the goal created by the Manager, the Employee has access to **Change Status** only.

Create Employee Goals



Click the numbered circles to move to the first step in each phase.

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GOAL NAME

STATUS

ACTIONS

Complete Certificati

✎ 📅 ✖

Complete Continuing Education Course

0

7/31/2019

12/31/2019

None

📄

This concludes the Create Employee Goals click-thru.