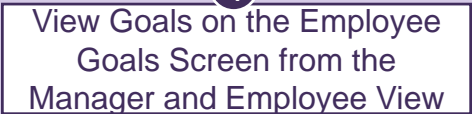


1 Overview

Overview



Add an Employee Goal for a Direct Report as a Manager



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

12/15/2016

None

Alone

Best viewed in IE or Adobe PDF Reader.

Overview of Employee Goals

1

Overview

2

Add an Employee Goal as an Employee

3

Add an Employee Goal for a Direct Report as a Manager

4

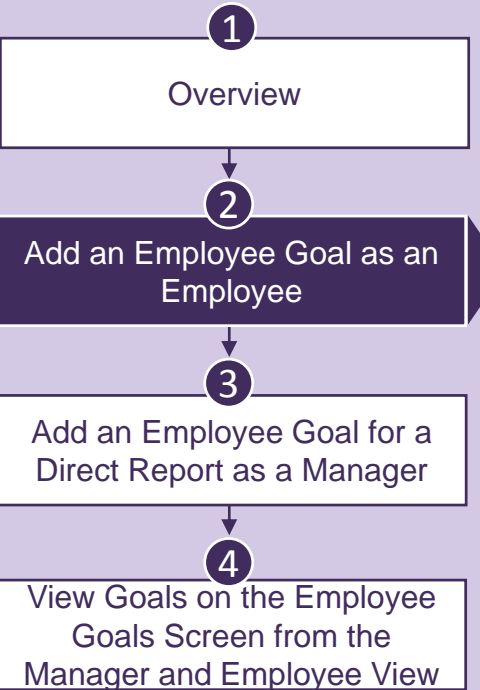
View Goals on the Employee Goals Screen from the Manager and Employee View

- » 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.

Create Employee Goals



The screenshot displays the Deltek Talent Management application interface. The left sidebar features a navigation menu with the following items: Dashboard, RECRUITING, PERFORMANCE (highlighted with a red box and callout A), Approvals, My Appraisals, My Goals (highlighted with a red box and callout B), Continuous Feedback, LEARNING, and CAREER CENTER. The main content area is titled 'Main Dashboard' and contains a 'Get More Widgets' button. The top header shows 'Application Development Testing Company', 'English', and user icons.

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

Reine Hiring Manager

Filter

No Employee Goal.

Create Employee Goal

C

Click **Create Employee Goal**.

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.

Employee Goals

Create New Employee Goal

IMPORT

EMPLOYEE

Reine Hiring Manager

GOAL NAME *

GOAL SCORE TYPE *

-- Select --

DESCRIPTION *

B **I** **U**

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**.

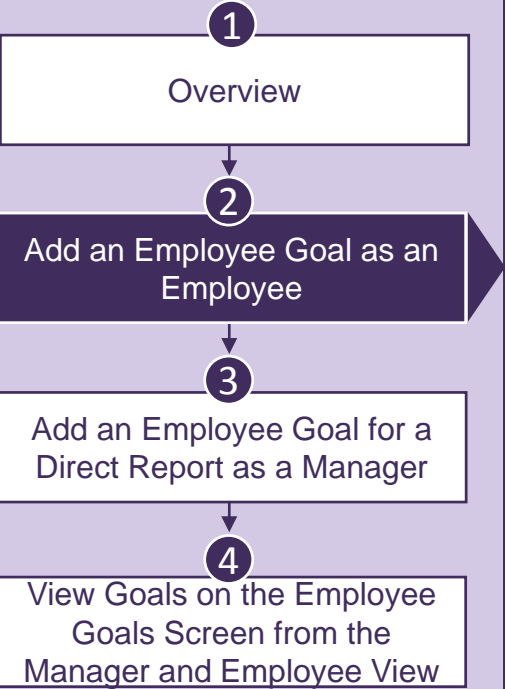
concrete criteria for measuring

F Enter a short **Description**.

attainment of the goal. It also discusses what success looks like once d. A measurable goal will usually answer questions such 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?

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

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?

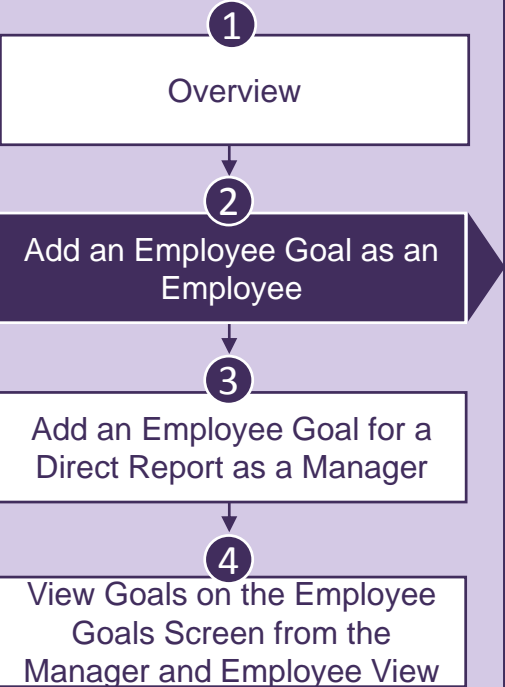


Time-bound goals are set within a time frame, giving them a target

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?

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
7/31/2019

TARGET DATE
12/31/2019

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:

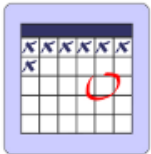
- Is this goal difficult yet realistic?
- What new skills or competencies will I need to acquire in order to achieve this goal?



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 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.

Submit

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.

Deltektalent Management

Development Testing Company

English

0

Jobs

Search...

View All

Edit

More Options

EMPLOYEE	START DATE
Reine Hiring Manager	7/31/2019

GOAL NAME	TARGET DATE
Complete Certification	12/31/2019

GOAL SCORE TYPE	PRIVATE
No Score	

DESCRIPTION
Complete online Leadership certification by end o

APPRAISALS
There is no data to display.

Change Status

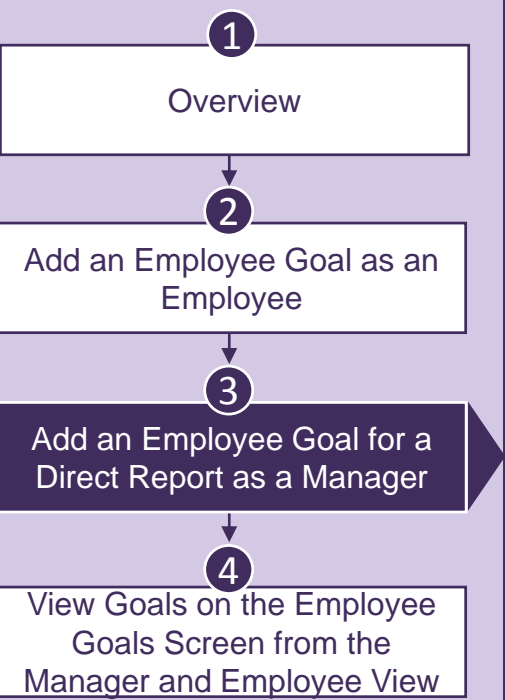
Retire Goal

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.

Create Employee Goals



The screenshot shows the Deltek Talent Management dashboard. The top navigation bar includes the Deltek logo, the text "Application Development Testing Company", and a language dropdown set to "English". The left sidebar contains a "Dashboard" link and a "MY EMPLOYEES" link, which is highlighted with a red box. Below this is a "My Employees" link and a "9 Box" link. The main content area has a search bar with "Employees" selected and a "Search..." input. A red callout box with a white 'A' and the text "Click MY EMPLOYEES." points to the "MY EMPLOYEES" link. Another red callout box with a white 'B' and the text "Click My Employees." points to the "My Employees" link. A large red callout box with white text states: "This screen demonstrates the Dashboard after the Manager has logged into Deltek Talent Management." The main content area also features a "Show All" button and a "Tasks" button.

Deltek Talent Management

Application Development Testing CompanyEnglish

Main Menu

MY EMPLOYEES

My Employees

9 Box

My Employees

Employees

Search...

My Employees / My Employees

My Employees

Performance

« < 1 > »

Displaying 1 - 7 of 7

102550

Reine Hiring Manager
RT - Hiring Manager
PB:
Human Resources
RT Hotel 5*

No appraisals for this employee.

ACTIONS

Continuous Feedback

Goals

Create New Appraisal

View TTP

Expand

No appraisals for this employee.

ACTIONS

Continuous Feedback

Goals

Create New Appraisal

View TTP

Expand

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.

Deltek Talent Management

Application Development Testing Company English

Employees

Search...

My Employees / My Employees

Employee Goals

Reine Hiring Manager

Create Employee Goal

Filter

<<

<

1

>

>>

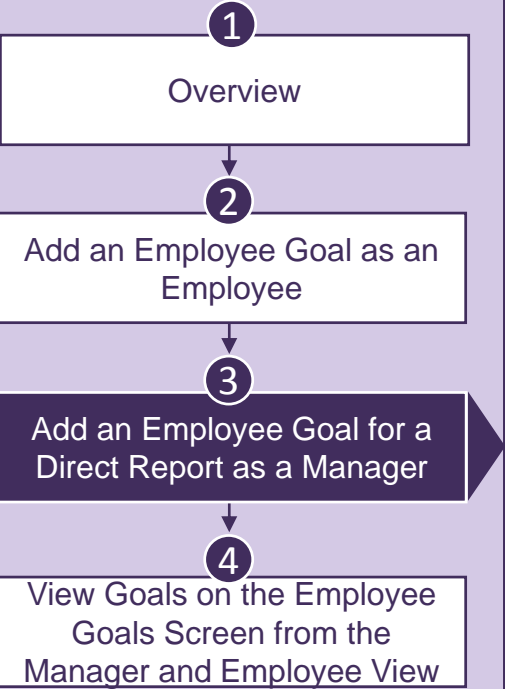
GOAL NAME	PROGRESS	START DATE	TARGET DATE	COMPLETION DATE	STATUS	ACTIONS
Complete Certification	0	31/7/2019	31/12/2019	None		<div></div>

E

Click Create Employee Goal.

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

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.

Employee Goals

Create New Employee Goal

IMPORT

Browse Library

Browse Manager Goals

Browse Manager's

Direct Reports

Browse Employee

Completed Goals

F

Click **Browse Library**.

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

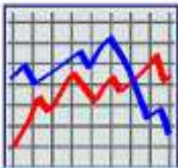
We'll demonstrate copying a goal from the Goals Library.



SMART goals need to be Specific. To make goals

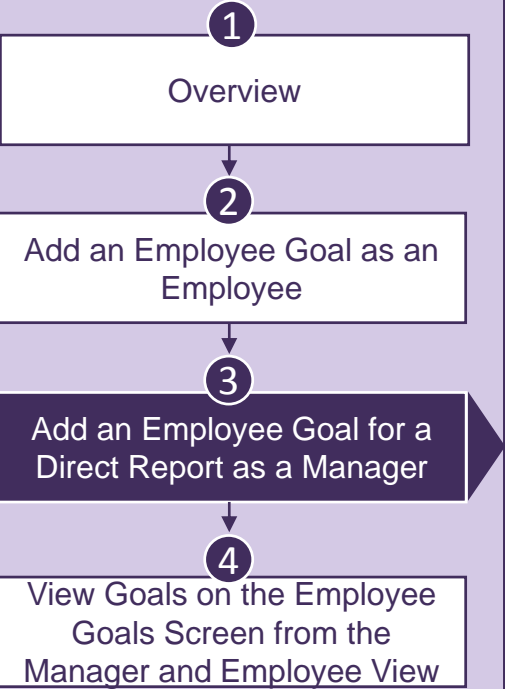
specific, they must indicate exactly what is going to be accomplished, why it is important, and who is to be involved. A specific goal will usually answer the following questions:

- 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



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.

Employees

Search...

Q

My Emp

Emp

Create

IMPO

Brows

Brows

Brows

Report

Brows

Comp

EMPL

Reine

GOAL

GOAL

-- Select --

DESCRIPTION

Close Window

Complete Continuing Education Course - Scale

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

Customer Driv

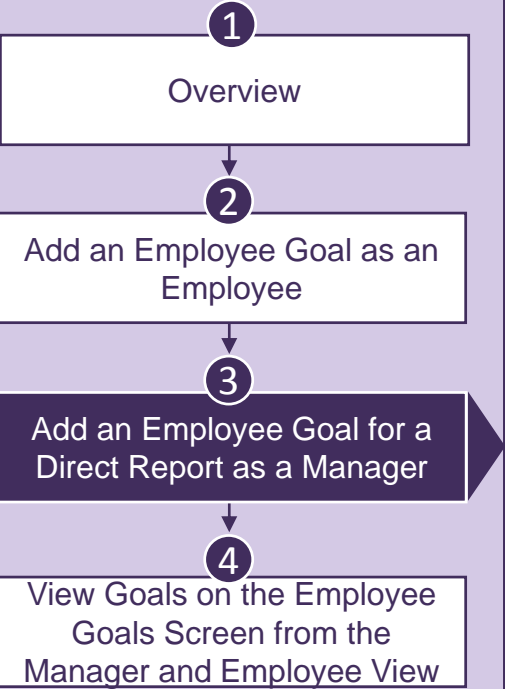
Support and con

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

Graph

A Measurable goal stresses the need for concrete criteria

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.

GOAL NAME *

Complete Continuing Education Course

GOAL SCORE TYPE *

Scale

DESCRIPTION *

B **I** **U** [List Icons] [Link Icon]

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

START DATE

TARGET DATE

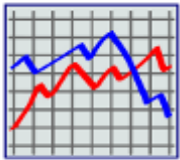
Goals can be assigned to employees as strategic objectives. They should be assigned to any

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

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

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 achieved?



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?

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.

group the related goal was already a part of.

RELATED GOAL

Browse

Goals are public by default and work together to achieve larger strategic 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

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

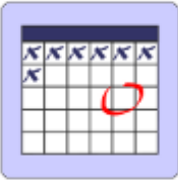
K If desired, check **Private** to hide it from users who are not directly involved with any appraisal the goal may be linked to at a later date. Scores and ratings are always private, regardless of this option.



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:

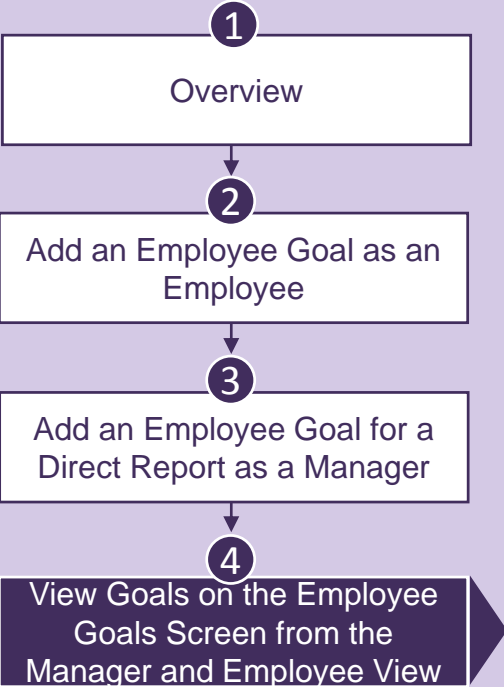
L Click **Submit** when finished.

Submit

Cancel

be completed/implemented?

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

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.

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.	

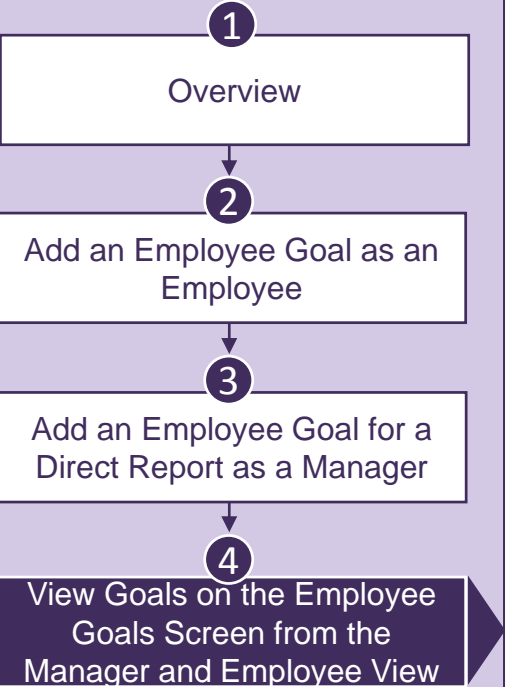
View All

Edit

More Options ▾

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

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.

Employee Goals

Reine Hiring Manager








Create Employee Goal

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

Filter

« < 1 > »

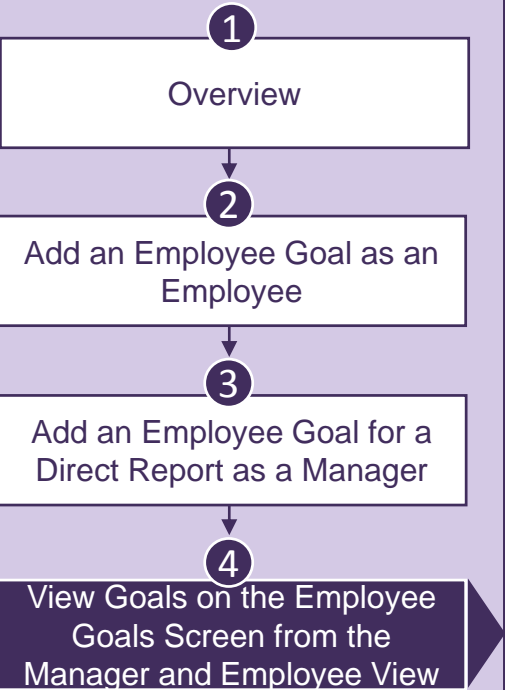
Displaying 1 - 2 of 2 10 25 50 100 per page

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.

Create Employee Goals



The screenshot shows the Deltek Talent Management interface. The top navigation bar includes the Deltek logo, the text 'Application Development Testing Company', and language settings ('English'). The left sidebar contains a menu with categories: 'RECRUITING', 'PERFORMANCE' (highlighted with a red box), 'LEARNING', and 'CAREER CENTER'. Under 'PERFORMANCE', there are links for 'Approvals', 'My Appraisals', 'My Goals' (highlighted with a red box), and 'Continuous Feedback'. The main content area is titled 'Main Dashboard' and features a search bar with a 'Jobs' dropdown and a 'Search...' input field. A purple callout box with the text 'This screen demonstrates the Dashboard after the user, Reine Hiring Manager, has logged into Deltek Talent Management.' is positioned above a large dashed rectangular area. A 'Get More Widgets' button is located in the top right corner of the main content area. Two annotations are present: 'B Click Performance.' with a red circle 'B' pointing to the 'PERFORMANCE' menu item, and 'C Click My Goals.' with a red circle 'C' pointing to the 'My Goals' menu item.

Dashboard

Jobs Search...

RECRUITING

PERFORMANCE

Approvals

My Appraisals

My Goals

Continuous Feedback

LEARNING

CAREER CENTER

Main Dashboard

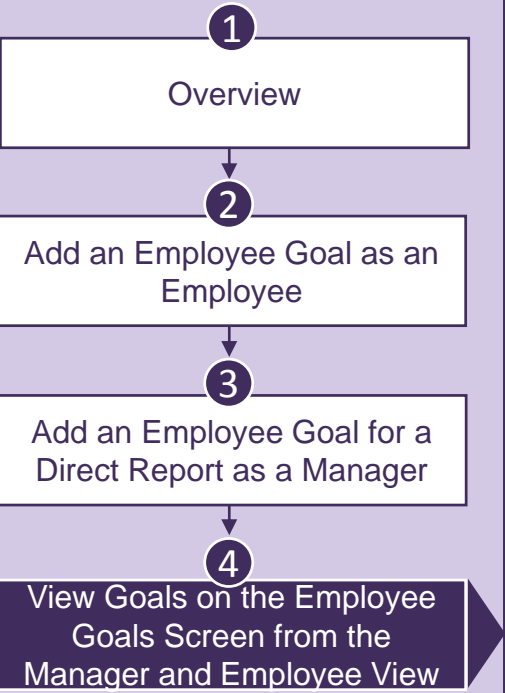
This screen demonstrates the Dashboard after the user, Reine Hiring Manager, has logged into Deltek Talent Management.

Get More Widgets

B Click Performance.

C Click My Goals.

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.

Main Menu

PERFORMANCE

Approvals

My Appraisals

My Goals

Continuous Feedback

Performance Jobs

Employee Goals

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

Create Employee Goal

Filter

« < 1 > »

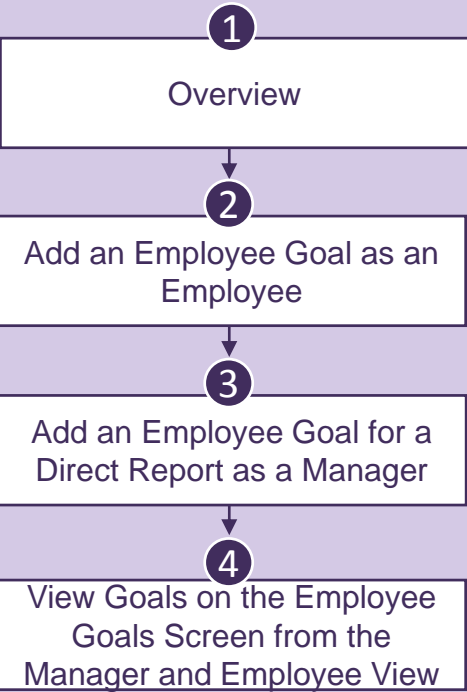
Displaying 1 - 2 of 2 10 25 50 100 per page

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

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

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.

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

◀ Main Menu

PERFORMANCE

Approvals

My Appraisals

My Goals

Continuous Feedback

Performance

Jobs

Search...



Employee Goals

Create Employee Goal

Filter

« < 1 > »

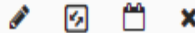
g 1 - 2 of 2 10 25 50 100 per page

GOAL NAME

STATUS

ACTIONS

Complete Certification



Complete Continuing Education Course

0

7/31/2019

12/31/2019

None



This concludes the Create Employee Goals click-thru.