

# Bring an Employee Goal Into an Appraisal

1

View Employee Goals

2

Add the Employee Goal Category to a Performance Workflow

3

Create an Appraisal Based on the Workflow

4

Open the Appraisal and View the Employee Goal

Dashboard

MY EMPLOYEES

RECRUITING

PERFORMANCE

LEARNING

SUCCESSION

CAREER CENTER

REPORTS

Employees

## Main Dashboard

In this click-thru, you will learn how an Administrator can bring an Employee Goal into an appraisal.

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

Kathryn Admin

12 Apr 2018

None

Rene Admin

18 Apr 2018

None

Eped to

None

None

Administrator

# Bring an Employee Goal Into an Appraisal



**Deltek Talent Management** Application Development Testing Company English

Main Menu My Employees Employees Search...

**MY EMPLOYEES** A Click MY EMPLOYEES.

My Employees B Click My Employees.

9 Box

Displaying 1 - 7 of 7 10 25 50 100 per page

No appraisals for this employee.

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

If an Administrator decides it would be beneficial to include Employee Goals created outside the Appraisal process into an appraisal, the Administrator can do this by adding the Employee Goals category to a Performance Workflow, and selecting to **Include Active Employee Goals**.

First, let's view the goal that will be pulled into an appraisal in Step 3.

Expand

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

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1  
View Employee Goals

2  
Add the Employee Goal Category to a Performance Workflow

3  
Create an Appraisal Based on the Workflow

4  
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Main Menu

MY EMPLOYEES

My Employees

9 Box

My Employees

Employees Search...

My Employees / My Employees

My Employees

Performance

« < 1 > »

No appraisals for this employee.



Reine Hiring Manager  
RT - Hiring Manager

PB:  
Human Resources  
RT Hotel 5\*

Displaying 1 - 7 of 7 10 25 50 100 per page

ACTIONS

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

Expand

C  
Click to expand the Actions menu.

D  
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.

# Bring an Employee Goal Into an Appraisal



**Deltek Talent Management** English

Employees Search...

My Employees / My Employees

## Employee Goals

Reine Hiring Manager [Create Employee Goal](#)

Filter

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

GOAL NAME	PROGRESS	START DATE	TARGET DATE	COMPLETION DATE	STATUS	ACTIONS
Complete Certification	0	1/4/2019	1/6/2019	None	On Track	

This Employee has one active goal, which will be dynamically pulled into the appraisal we will demonstrate creating in Step 3. To do this, an Administrator must first add the Employee Goals category to a Performance Workflow. Let's demonstrate.

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

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# Bring an Employee Goal Into an Appraisal

1

View Employee Goals

2

Add the Employee Goal Category to a Performance Workflow

3

Create an Appraisal Based on the Workflow

4

Open the Appraisal and View the Employee Goal

Employees Search...

My Employees / My Employees

## Employee Goals

Reine Hiring Manager

Filter

1

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

GOAL NAME	PROGRESS	START DATE	TARGET DATE	COMPLETION DATE	STATUS	ACTIONS
Complete Certification	0	1/4/2019	1/6/2019	None	On Track	

A

Click the Administration icon.

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.

# Bring an Employee Goal Into an Appraisal

1  
View Employee Goals

2  
Add the Employee Goal Category to a Performance Workflow

3  
Create an Appraisal Based on the Workflow

4  
Open the Appraisal and View the Employee Goal

Employees

My Employees / My Employees

### Administration

- Performance**
  - Appraisals
  - Appraisal Administration
  - Workflows**
  - Continuous Feedback
  - Session Meeting Reasons
- Goals

B  
Scroll to the **Performance** section.

C  
Click **Workflows**.

#### System Settings

- Scales
- Skills
- Users
- View Off-Boarded Users

#### Support Tools

- User Tools
- Main Index
- Integrations Setup

### Learning

<b>Courses &amp; Classes</b>	<b>Logistics</b>
Classes	Buildings
Class Evaluations	Equipment
Courses	Rooms
Test Templates	<b>Library</b>
Tuition Assistance	Library Resources

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

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1

View Employee Goals

2

Add the Employee Goal Category to a Performance Workflow

3

Create an Appraisal Based on the Workflow

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

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WORKFLOW NAME	TYPE	DATE CREATED	LAST MODIFIED	MODIFIED BY	ASSOCIATIONS	AUTO SCHEDULED	
Reine's Workflow	Annual Appraisal	6/23/2009	7/30/2019	Admin HRsmart		No	
DEV - Default Appraisal	Annual Appraisal	3/15/2010	11/11/2015	None		No	
Reassign/Term Check	Annual Appraisal	6/25/2009	2/15/2013	None		No	
KC - Creative EPM Workflow	Annual Appraisal	1/4/2011	7/27/2016	None	Company/Division Kat's Creative Detective Agency	Yes	
HD - Complete Workflow	Annual Appraisal	1/24/2011	2/15/2013	None	Company/Division Hiba's Singers Production Company	No	
ZL - EPM Workflow 01	Annual Appraisal	10/14/2011	2/9/2016	None	Company/Division Zenmar's General Services Incorporated	No	
EM - EPM Workflow	Annual Appraisal	5/20/2011	1/16/2015	None	Company/Division	No	

D

Scroll to the existing workflows section and click the Edit icon for the workflow where you want to add the Employee Goal category.

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1  
View Employee Goals

2  
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3  
Create an Appraisal Based on the Workflow

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Open the Appraisal and View the Employee Goal

## Workflow

Reine's Workflow

Step 1 Identification | **Step 2 Categories** | Step 3 Content | Step 4 Scale | Step 5 Phases | Step 6 Configuration | Step 7 Appraisers | Step 8 Approvals | Step 9 Approval Order | Step 10 Scheduling | Step 11 Review

E  
Click the Categories step.

WORKFLOW NAME \*  
Reine's Workflow

WORKFLOW TYPE  
Annual Appraisal

DESCRIPTION

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



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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## Workflow

Reine's Workflow

Step 1 Identification | **Step 2 Categories** | Step 3 Content | Step 4 Scale | Step 5 Phases | Step 6 Configuration | Step 7 Appraisers | Step 8 Approvals | Step 9 Approval Order | Step 10 Scheduling | Step 11 Review

Available Items		Selected Items	
CZ - Goal Category (Goal)	+	Core Competencies (Competency)	Weight 33.34 % ✕
DC - Goal Category (Goal)	+	Job Competencies (Competency)	Weight 33.33 % ✕
Employee Goals (Goal)	<b>F</b> +	<b>Total Weight</b>	<b>100.00</b>
Goals (Goal)	+	<b>Equalize Weights</b>	<b>Normalize Weights to 100</b>
IN - Diplomacy Goals (Goal)	+		
JI - Goals (Goal)	+		
JJ Nordlings Goal (Goal)	+		
KL - Leadership and Management Competencies (Competency)	+		

F Locate the Employee Goals category in the Available Items list and click the plus icon to select it.

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

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1  
View Employee Goals

2  
Add the Employee Goal Category to a Performance Workflow

3  
Create an Appraisal Based on the Workflow

4  
Open the Appraisal and View the Employee Goal

## Workflow

Reine's Workflow

Step 1 Identification	Step 2 Categories	Step 3 Content	Step 4 Scale	Step 5 Phases	Step 6 Configuration	Step 7 Appraisers	Step 8 Approvals	Step 9 Approval Order	Step 10 Scheduling	Step 11 Review
--------------------------	----------------------	-------------------	-----------------	------------------	-------------------------	----------------------	---------------------	--------------------------	-----------------------	-------------------

G  
Click the Content step.

Available Items		Selected Items			
Achievements (Global Achievement)	+	Core Competencies (Competency)	Weight	33.34	% ✕
AB - Healthcare Competencies and Others (Competency)	+	Job Competencies (Competency)	Weight	33.33	% ✕
Active & Passive Communication (DEV) (Competency)	+	Employee Goals (Goal)	Weight	33.33	% ✕
ALG Competencies (Competency)	+	<b>Total Weight</b>		<b>100.00</b>	
AS - Magical (Competency)	+				
Athletic Category (DEV) (Competency)	+				
Basic Management (DEV) (Competency)	+				
CL - Leadership and Management Competencies (Competency)	+				

Equalize Weights

Normalize Weights to 100

If desired, modify the weight for the Employee Goals category. Equalize and normalize the weights across the categories, as needed.

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

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# Bring an Employee Goal Into an Appraisal

1

View Employee Goals

2

Add the Employee Goal Category to a Performance Workflow

3

Create an Appraisal Based on the Workflow

4

Open the Appraisal and View the Employee Goal

Systems Evaluation ⓘ	+
Technology Design ⓘ	+
Telecommunications ⓘ	+
Working with numbers and solving equations ⓘ	+
Writing ⓘ	+

## Employee Goals

Lock Category

### Available Items

Include Active Employee Goals

+

### Selected Items

Total Weight

0.00

H

Scroll to the Employee Goals section.

I

Click the plus icon for **Include Active Employee Goals**.

Adding **Include Active Employee Goals** to a workflow means that when an appraisal based on this workflow is launched for an Employee, all of the active Employee Goals for that Employee, like the one we viewed in Step 1, will be pulled into the appraisal.

← Previous

Save Changes

Next →

Cancel

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.

# Bring an Employee Goal Into an Appraisal

1

View Employee Goals

2

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3

Create an Appraisal Based on the Workflow

4

Open the Appraisal and View the Employee Goal

Systems Evaluation ⓘ	+
Technology Design ⓘ	+
Telecommunications ⓘ	+
Working with numbers and solving equations ⓘ	+
Writing ⓘ	+

## Employee Goals

Lock Category

Available Items

Selected Items

Include Active Employee Goals

Weight

100.00

%

✕

Total Weight

100.00

← Previous

Save Changes

Next →

Cancel

J

Click **Save Changes**.

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.

# Bring an Employee Goal Into an Appraisal

1  
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3  
Create an Appraisal Based on the Workflow

4  
Open the Appraisal and View the Employee Goal

## Workflows

✓ Success: The workflow was successfully saved. ✕

Create New Workflow

Reine's Workflow	Annual Appraisal	6/23/2009	6/9/2015	None		No							
DEV - Default Appraisal	Annual Appraisal	3/15/2010	<div data-bbox="1121 283 1943 516" data-label="Text"> <p>The workflow is saved with the trigger to include Active Employee Goals. Next we'll create an appraisal based on this workflow and demonstrate how the Employee Goal is pulled into the appraisal.</p> </div>										
Reassign/Term Check	Annual Appraisal	6/25/2009											
KC - Creative EPM Workflow	Annual Appraisal	1/4/2011	7/27/2016	None	Company/Division Kat's Creative Detective Agency	Yes							
HD - Complete Workflow	Annual Appraisal	1/24/2011	2/15/2013	None	Company/Division Hiba's Singers Production Company	No							
ZL - EPM Workflow 01	Annual Appraisal	10/14/2011	2/9/2016	None	Company/Division Zenmar's General Services	No							

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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1  
View Employee Goals

2  
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3  
Create an Appraisal Based on the Workflow

4  
Open the Appraisal and View the Employee Goal

Main Menu

My Employees

MY EMPLOYEES

A  
Click MY EMPLOYEES.

My Employees

B  
Click My Employees.

My Matrix Employee

Main Dashboard

Get More Widgets Tasks

9 Box

Project Teams

Certifications

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

Show All

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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1

View Employee Goals

2

Add the Employee Goal Category to a Performance Workflow

3

Create an Appraisal Based on the Workflow

4

Open the Appraisal and View the Employee 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.

← 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 10 25 50 100 per page



No appraisals for this employee.

Reine Hiring Manager  
RT - Hiring Manager

PB:  
Human Resources  
RT Hotel 5\*



C Click to expand the Actions menu.

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

D Click **Create New Appraisal**.

Expand ▾



No appraisals for this employee.



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1

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2

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3

Create an Appraisal Based on the Workflow

4

Open the Appraisal and View the Employee Goal

My Employees / My Employees

## Launch Appraisals

Step 1

Select Employees

Step 2

Select Performance Workflow

Step 3

Review

« < 1 > »

Displaying 1 - 4 of 4 10 25 50 100 per page

<input type="checkbox"/>	EMPLOYEE NAME ▾	EMPLOYEE ID ▾	MANAGER ▾	ORGANIZATIONAL UNIT ▾	JOB TITLE ▾	LOCATION ▾	APPRAISALS
<input checked="" type="checkbox"/>	Reine Hiring Manager		Reine Admin	Human Resources	RT - Hiring Manager (RT254)	RT Hotel 5*	No appraisals for this employee.

The Employee for whom we launched the appraisal is selected by default. Click **Next** to move to the next step and select the Performance Workflow from Step 2.

← Previous

Next →

E

Click **Next**.

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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1

View Employee Goals

2

Add the Employee Goal Category to a Performance Workflow

3

Create an Appraisal Based on the Workflow

4

Open the Appraisal and View the Employee Goal

Employees Search...

My Employees / My Employees

## Launch Appraisals

Step 1  
Select Employees

Step 2  
Select Performance Workflow

Step 3  
Review

### APPRAISAL SOURCE

Most Closely Associated Workflows

Choose Workflow

-- Select --

PBA - EPM Workflow

RC - EPM Workflow

RC - EPM Workflow 2

Reassign/Term Check

Reine's Workflow

RF - EPM Work Flow

RN-RA Multiple Appraiser

RN-RA Self Appraising

RN-RA WORKFLOW (Approval A)

RN-RA WORKFLOW (Complete/INC Goal RBNA)

RN-RA WORKFLOW (Goal only)

F

Click **Choose Workflow**.

G

Click the down arrow to expand the selections.

H

Select the workflow from Step 2, **Reine's Workflow**.

Next

Cancel

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.

v16.0.1  
Last sync

# Bring an Employee Goal Into an Appraisal

1

View Employee Goals

2

Add the Employee Goal Category to a Performance Workflow

3

Create an Appraisal Based on the Workflow

4

Open the Appraisal and View the Employee Goal

My Employees / My Employees

## Launch Appraisals

Step 1

Select Employees

Step 2

Select Performance Workflow

Step 3

Review

### APPRAISAL SOURCE

Most Closely Associated Workflow

Choose Workflow

Reine's Workflow

Copy Appraisal

-- Select --

Mark Appraisal as Primary

### Launch Appraisals from Workflow

APPRAISAL NAME \*

Reine Hiring Manager Appraisal

EMPLOYEE NAME	EMPLOYEE ID	MANAGER	ORGANIZATIONAL UNIT	JOB TITLE	LOCATION	APPRAISALS
Reine Hiring Manager		Reine Admin	Human Resources	RT - Hiring Manager (RT254)	RT Hotel 5*	No appraisals for this employee.

< Previous

> Next

Cancel

Click Next.

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.

# Bring an Employee Goal Into an Appraisal

1  
View Employee Goals

2  
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3  
Create an Appraisal Based on the Workflow

4  
Open the Appraisal and View the Employee Goal

## Launch Appraisals

Step 1  
Select Employees

Step 2  
Select Performance Workflow

Step 3  
Review

Workflow Edit

SOURCE WORKFLOW  
Reine's Workflow

APPRAISAL NAME  
Reine Hiring Manager Appraisal

Employees Edit

EMPLOYEE NAME	EMPLOYEE ID	MANAGER	ORGANIZATIONAL UNIT	JOB TITLE	LOCATION	APPRAISALS
<a href="#">Reine Hiring Manager</a>		Reine Admin	Human Resources	RT - Hiring Manager (RT254)	RT Hotel 5*	No appraisals for this employee.

Previous **Finish** Cancel

J  
Click Finish.

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

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# Bring an Employee Goal Into an Appraisal

1  
View Employee Goals

2  
Add the Employee Goal Category to a Performance Workflow

3  
Create an Appraisal Based on the Workflow

4  
Open the Appraisal and View the Employee Goal

Main Menu

My Employees Employees Search...

MY EMPLOYEES

A  
Click MY EMPLOYEES.

Now let's open the appraisal we launched in Step 3 to view the active Employee Goal pulled into the appraisal.

My Employees

B  
Click My Employees.

My Employees

My Matrix Employee

9 Box

Project Teams

Certifications

Development Learning

Displaying 1 - 6 of 6 10 25 50 100 per page



Reine Admin  
PB:  
Administration and General  
RT Hotel 5\*

APPRAISALS	CURRENT PHASE	SCORE	PHASE END DATE
★ Mars wf full 2 Approvals	Performance	Incomplete	
★ Reine Hiring Manager Appraisal	Planning	Incomplete	

C  
Click Reine Hiring Manager Appraisal.

Expand

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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1  
View Employee Goals

2  
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3  
Create an Appraisal Based on the Workflow

4  
Open the Appraisal and View the Employee Goal

## Reine Hiring Manager Appraisal

for Reine Hiring Manager (RT - Hiring Manager)

Print Appraisal

This appraisal is ready to move to the next phase.

Move to the Next Phase

APPRAISAL INFORMATION

CORE COMPETENCIES (33.34%)

JOB COMPETENCIES (33.33%)

**EMPLOYEE GOALS (33.33%)**

CONTINUOUS FEEDBACK

RECOGNITION

SUMMARY

Step 1

Planning

Step 2

Performance

Step 3

Assessment

Step 4

Review

D

Click the **Employee Goals** 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\_62270be815742523109679d3b2d62023@~ (No signatures are required)

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

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1

View Employee Goals

2

Add the Employee Goal Category to a Performance Workflow

3

Create an Appraisal Based on the Workflow

4

Open the Appraisal and View the Employee Goal

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

## Employee Goals (100.00%)

Collapse All Notes

Add Goal

Manage Weights

### Complete Certification (100.00%)

The Active Goal, Complete Certification, that we viewed for this Employee in Step 1 is dynamically included in the appraisal.

Complete certification before end of second quarter to meet promotion criteria.

GOAL SCORE TYPE No Score

PRIVATE No

START DATE 1/4/2019

TARGET DATE 1/6/2019

COMPLETION DATE

GOAL STATUS On Track

RELATED GOAL [Browse](#)

### General Appraisal Notes

Add Journal Entry

There are no journal entries.

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

## Employee Goals (100.00%)

Collapse All Notes

Add Goal

Manage Weights

### Complete Certification (100.00%)



Complete certification before end of second quarter to meet promotion criteria.

GOAL SCORE TYPE No Score

PRIVATE No

START DATE 1/1/2024

TARGET DATE 1/1/2025

COMPLETION DATE

GOAL STATUS On Track

RELATED GOAL [Browse](#)

This concludes the Bring an Employee Goal Into an Appraisal click-thru.

### General Appraisal Notes

Add Journal Entry

There are no journal entries.