

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

≡

Delttek Talent Management

Application Development Testing Company

English ▾

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👤

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

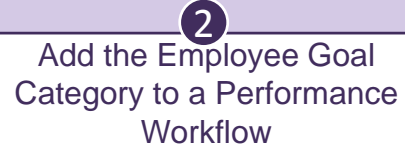
Kathryn Admin 12 Apr 2016

Reine Admin 18 Apr 2016

Epe to Administrator

Best viewed in IE or Adobe PDF Reader.

Bring an Employee Goal Into an Appraisal



Deltek Talent Management

Application Development Testing Company English

0

Main Menu

MY EMPLOYEES

My Employees

9 Box

My Employees

Employees

Search...

A

Click MY EMPLOYEES.

B

Click My Employees.

Displaying 1 - 7 of 7

10

25

50

100

per page

Reine Hiring Manager

RT - Hiring Manager

PB:

Human Resources

RT Hotel 5*

No appraisals for this employee.

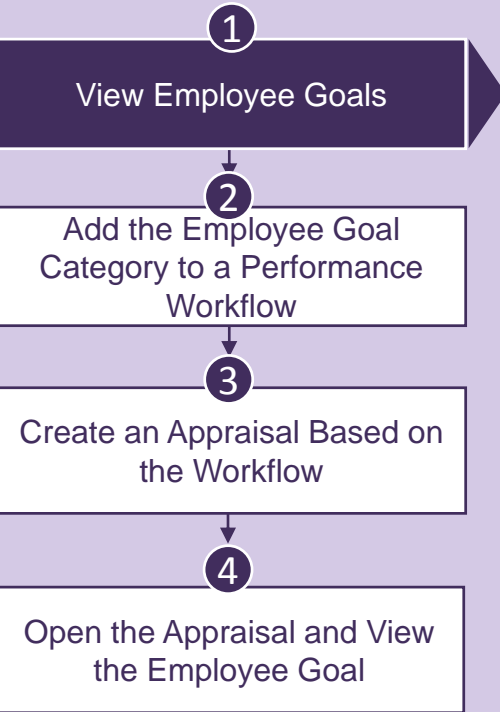
If an Administrator decides it would be beneficial to include Employee Goals created outside the Appraisal process into an appraisal, the Administrator can do this by adding the Employee Goals category to a Performance Workflow, and selecting to **Include Active Employee Goals**.

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

Expand

No appraisals for this employee.

Bring an Employee Goal Into an Appraisal



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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English

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Employees

Search...

My Employees / My Employees

Create Employee Goal

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	<div></div> <div></div> <div></div> <div></div>

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.

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

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Delttek Talent Management

English

0

Employees

Search...

My Employees / My Employees

Employee Goals

Reine Hiring Manager

Filter

<<1>>

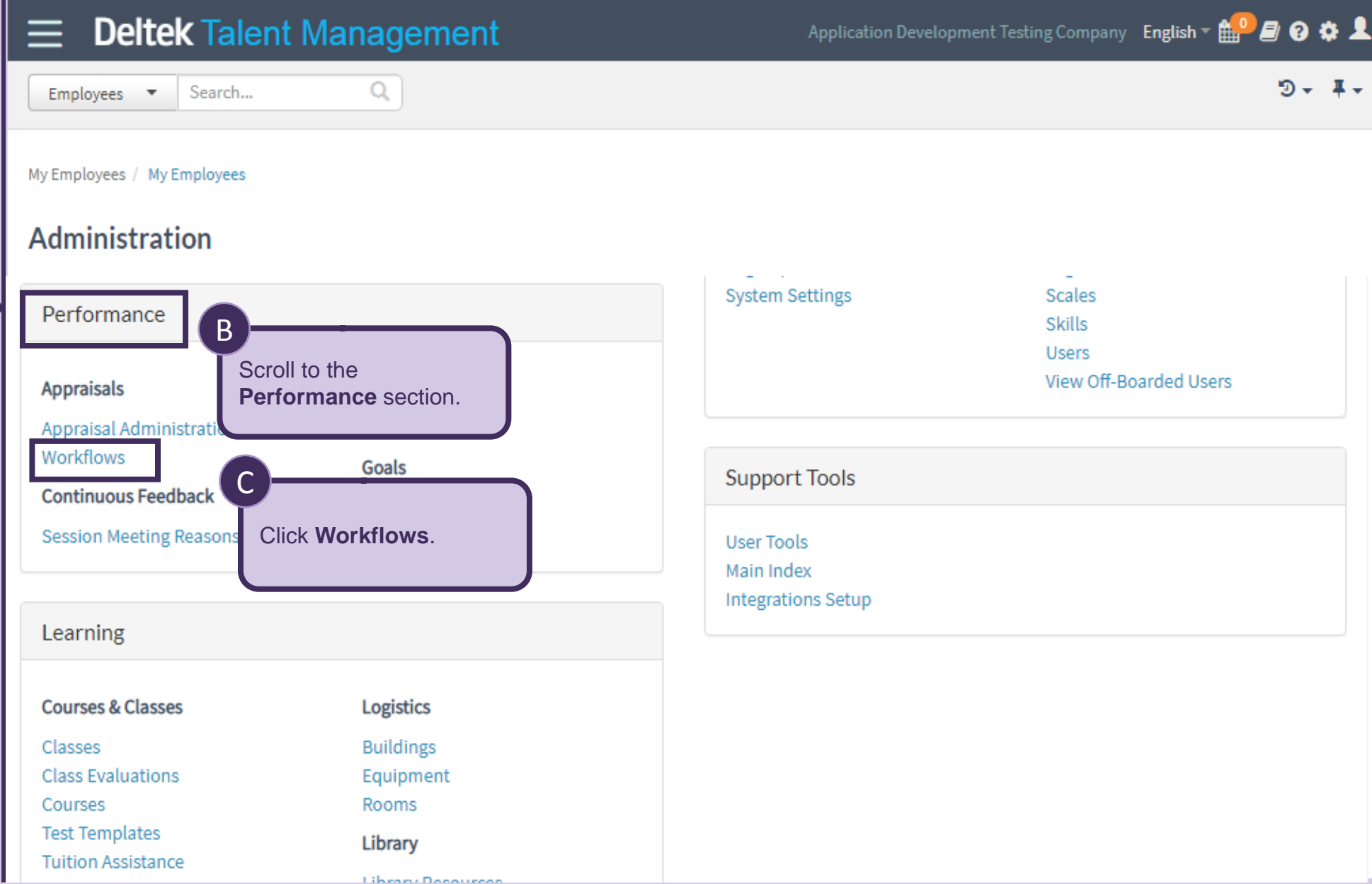
Displaying 1 - 1 of 1

102550100

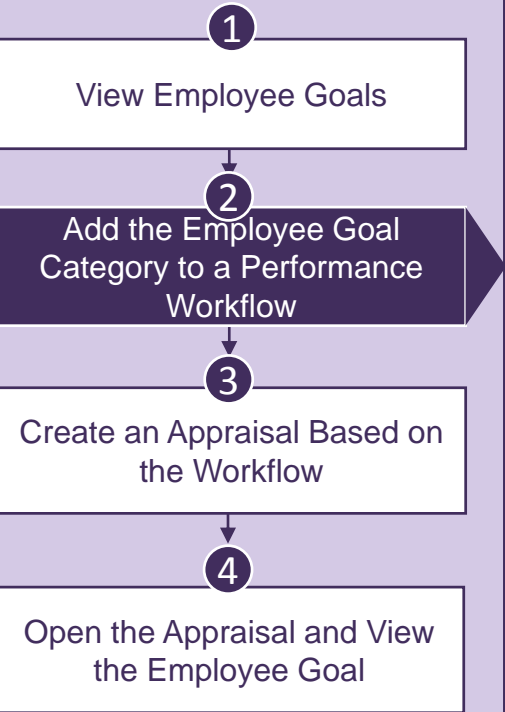
per page

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

A
Click the Administration icon.







Bring an Employee Goal Into an Appraisal



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

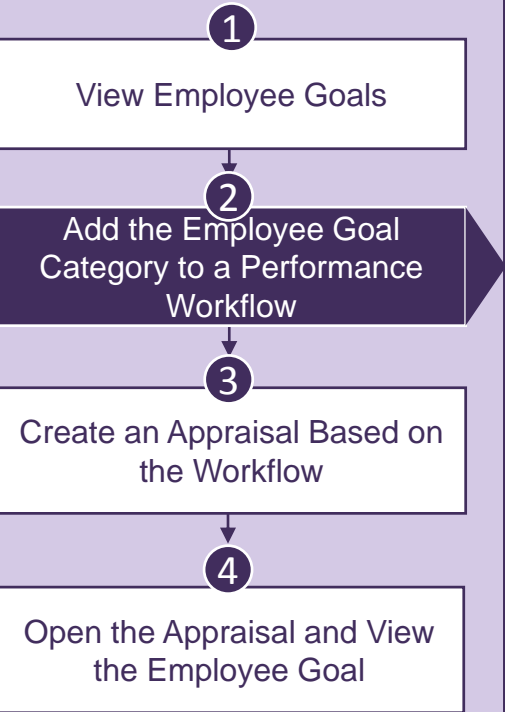
Use the arrow keys or PgUp/PgDn keys to move through each step and sub-step.

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.

Bring an Employee Goal Into an Appraisal



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.

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

1=

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± =

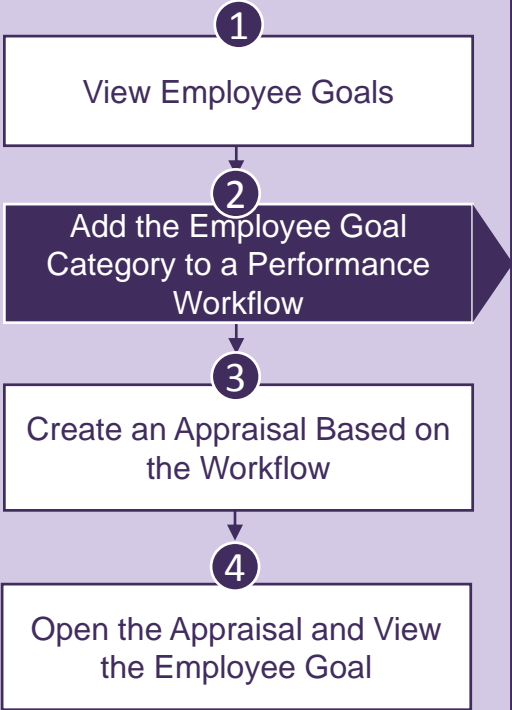
± =

⌂

✕

⚠

Bring an Employee Goal Into an Appraisal



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.

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	
CZ - Goal Category (Goal)	+
DC-Goal Category (Goal)	+
Employee Goals (Goal)	+
Goals (Goal)	+
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.

Selected Items			
Core Competencies (Competency)	Weight	33.34	%
Job Competencies (Competency)	Weight	33.33	%
Total Weight		100.00	

Equalize Weights

Normalize Weights to 100

Bring an Employee Goal Into an Appraisal



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.

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.

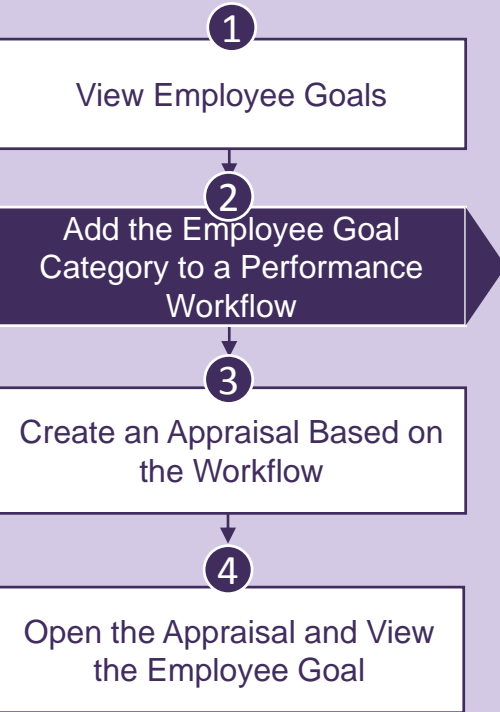
Available Items	
Achievements (Global Achievement)	+
AB - Healthcare Competencies and Others (Competency)	+
Active & Passive Communication (DEV) (Competency)	+
ALG Comptencies (Competency)	+
AS - Magical (Competency)	+
Athletic Category (DEV) (Competency)	+
Basic Management (DEV) (Competency)	+
CL - Leadership and Management Competencies (Competency)	+

Selected Items			
Core Competencies (Competency)	Weight	33.34	% ✕
Job Competencies (Competency)	Weight	33.33	% ✕
Employee Goals (Goal)	Weight	33.33	% ✕
Total Weight		100.00	

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.

Bring an Employee Goal Into an Appraisal



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.

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

Employee Goals

☐ Lock Category

Available Items

Include Active Employee Goals

H Scroll to the Employee Goals section.

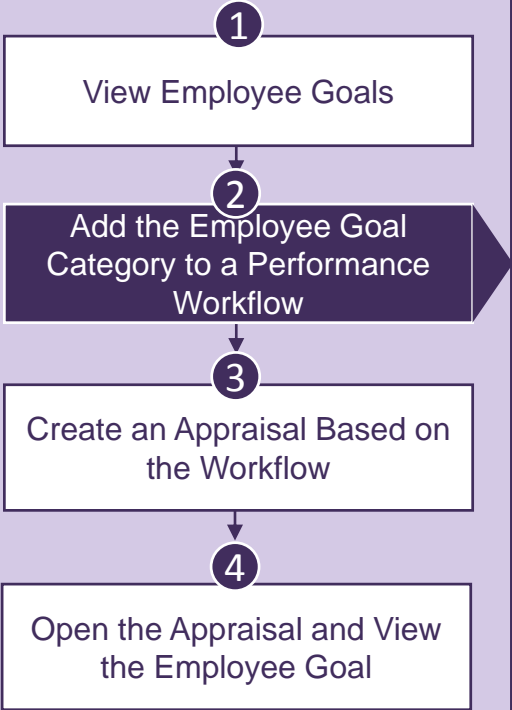
Selected Items

Total Weight	0.00
--------------	------

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.

Bring an Employee Goal Into an Appraisal



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.

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

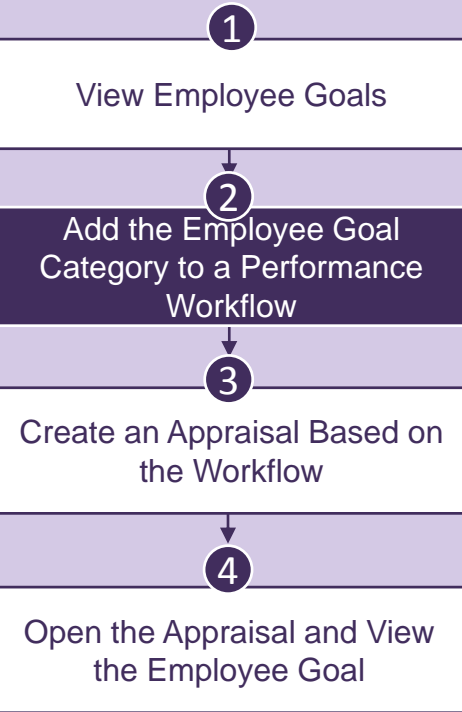
⏩ Next

Cancel

J

Click **Save Changes**.

Bring an Employee Goal Into an Appraisal



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.

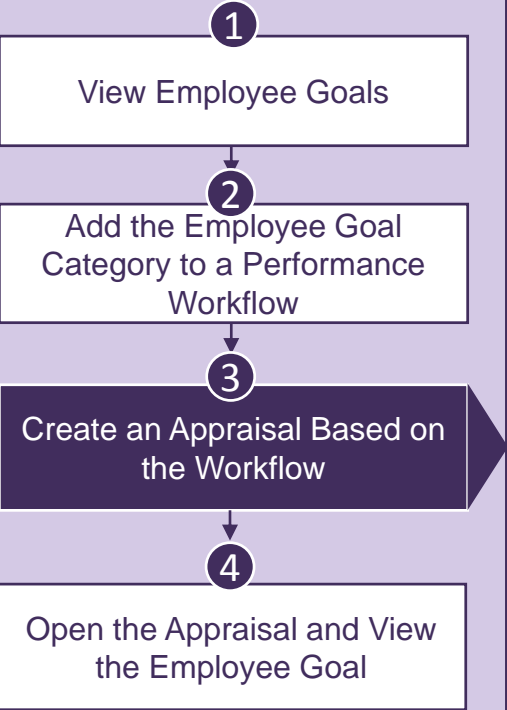
Workflows

✓ Success: The workflow was successfully saved.

Create New Workflow

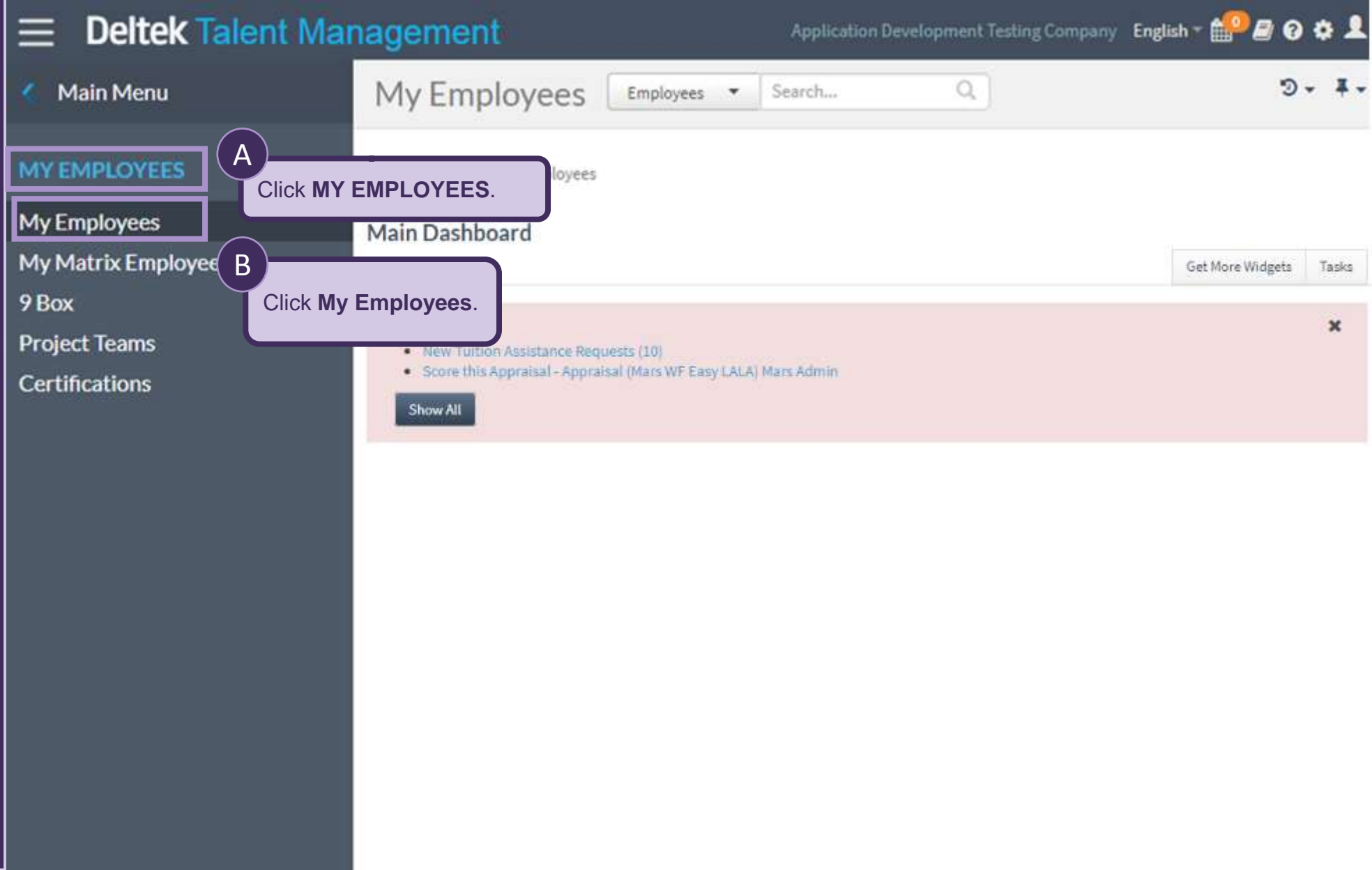
Reine's Workflow	Annual Appraisal	6/23/2009	6/9/2015	None		No						
DEV - Default Appraisal	Annual Appraisal	3/15/2010	The workflow is saved with the trigger to include Active Employee Goals. Next we'll create an appraisal based on this workflow and demonstrate how the Employee Goal is pulled into the appraisal.									
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						

Bring an Employee Goal Into an Appraisal

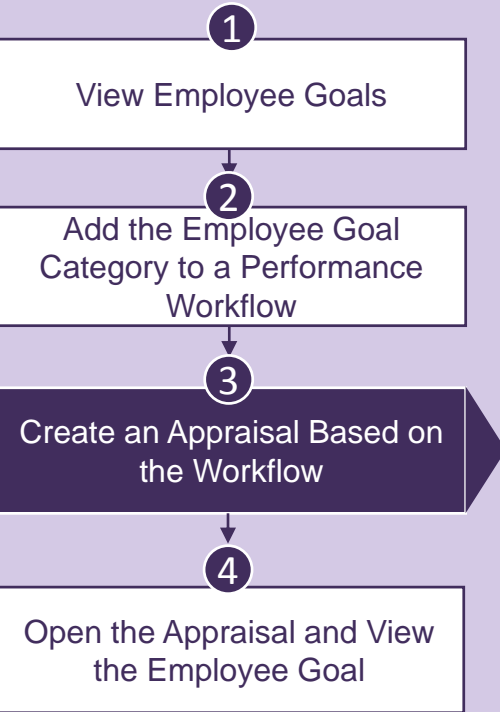


Click the numbered circles to move to the first step in each phase.

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



Bring an Employee Goal Into an Appraisal



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 0

Main Menu

MY EMPLOYEES

My Employees

9 Box

My Employees

Performance

« < 1 > »

No appraisals for this employee.

Reine Hiring Manager
RT - Hiring Manager

PB:
Human Resources
RT Hotel 5*

No appraisals for this employee.

Employees Search...

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

C Click to expand the Actions menu.

D Click Create New Appraisal.

ACTIONS

Continuous Feedback

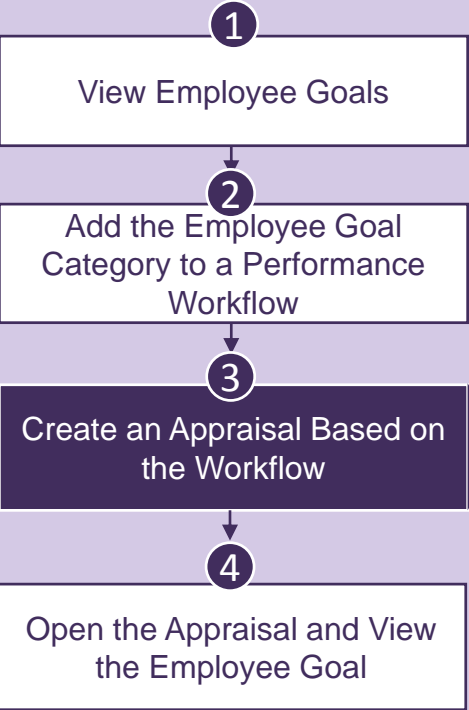
Goals

Create New Appraisal

View TTP

Expand

Bring an Employee Goal Into an Appraisal



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.

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.

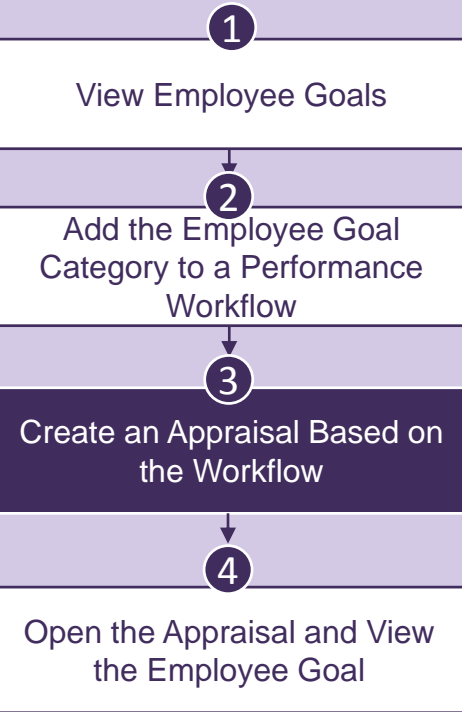
The Employee for whom we launched the appraisal is selected by default. Click **Next** to move to the next step and select the Performance Workflow from Step 2.

< Previous

> Next

Click **Next**.

Bring an Employee Goal Into an Appraisal



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...

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)

Next

Cancel

F

Click **Choose Workflow**.

G

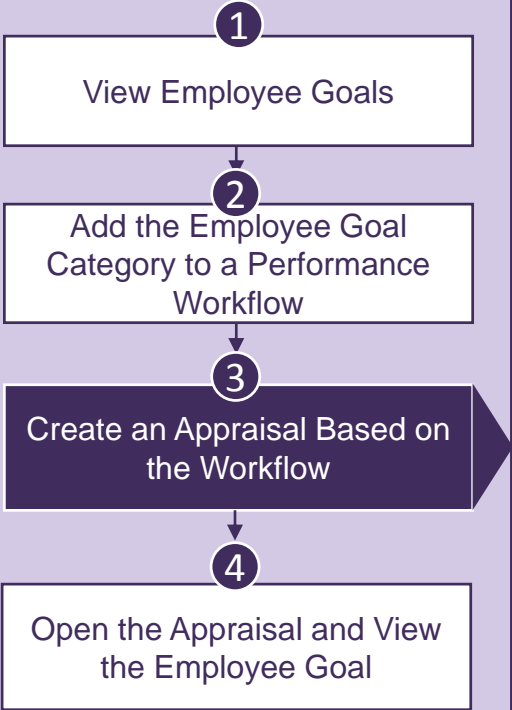
Click the down arrow to expand the selections.

H

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

v16.0.1
Last sync

Bring an Employee Goal Into an Appraisal



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

Launch Appraisals

Step 1
Select Employees

Step 2
Select Performance Workflow

Step 3
Review

APPRAISAL SOURCE

☐ Most Closely Associated Workflow

☒ Choose Workflow

☐ Copy Appraisal

Reine's Workflow

-- 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.

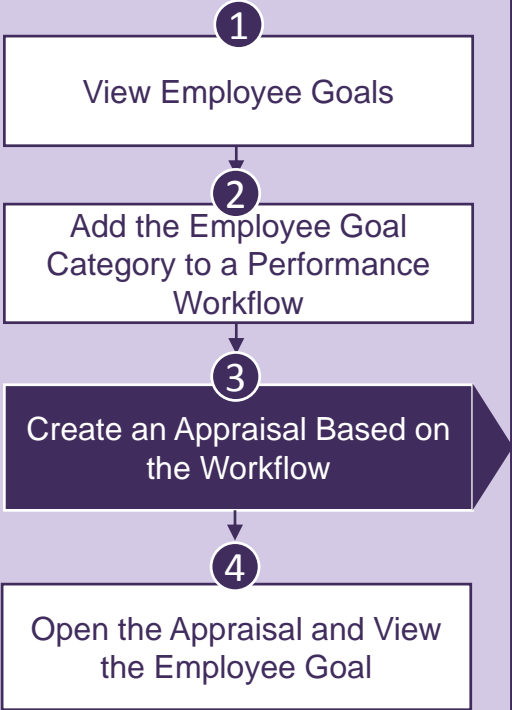
< Previous

> Next

Cancel

Click Next.

Bring an Employee Goal Into an Appraisal



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.

Launch Appraisals

Step 1
Select Employees

Step 2
Select Performance Workflow

Step 3
Review

Workflow

SOURCE WORKFLOW

Reine's Workflow

APPRAISAL NAME

Reine Hiring Manager Appraisal

Employees

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

> Finish

Cancel

J
Click Finish.

- 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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Main Menu

MY EMPLOYEES

My Employees

My Matrix Employee

9 Box

Project Teams

Certifications

My Employees

Employees Search...

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	

Expand

A Click MY EMPLOYEES.

B Click My Employees.

C Click Reine Hiring Manager Appraisal.

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

Bring an Employee Goal Into an Appraisal



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](#)

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

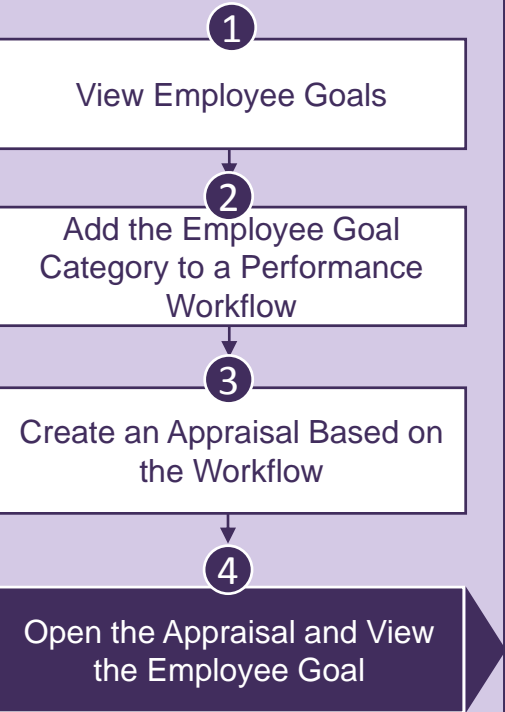
1. ~@epm_workflow_phase_06540b2b5a8712538a338983b2cb8218@~ (No signatures are required)

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)

Bring an Employee Goal Into an Appraisal



Employee Goals (100.00%)

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

Complete Certification (100.00%)

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

GOAL SCORE TYPE	No Score
PRIVATE	No
START DATE	1/4/2019
TARGET DATE	1/6/2019
COMPLETION DATE	
GOAL STATUS	On Track
RELATED GOAL	Browse

General Appraisal Notes

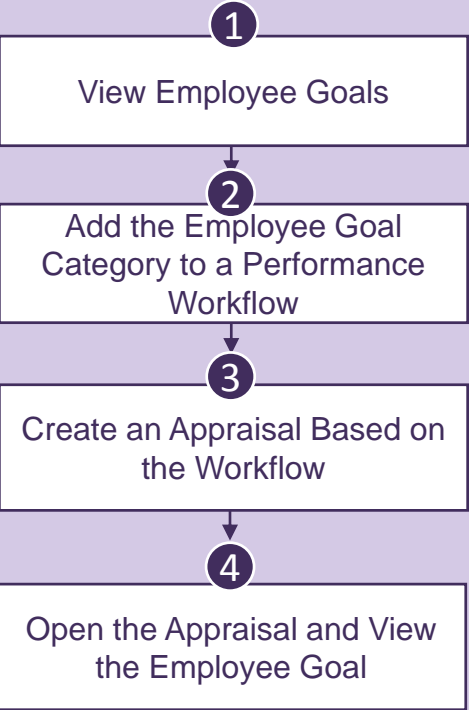
Add Journal Entry

There are no journal entries.

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



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 (100.00%)

Complete Certification (100.00%)



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

GOAL SCORE TYPENo Score

PRIVATENo

START DATE1/1/2024

TARGET DATE1/1/2025

COMPLETION DATE

GOAL STATUSOn Track

RELATED GOALQ Browse

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

General Appraisal Notes

Add Journal Entry

There are no journal entries.