

Bring an Employee Goal Into an Appraisal Quick Steps

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

The high-level steps an Administrator takes to bring an Employee Goal into an appraisal are shown in the menu on the left.

Navigation

- Click the numbered circles on the left to move to the first step in each phase.
- Use the **Page Down** key to proceed through the quick steps. Use the **Page Up** key to return to a prior slide.

Get More Widgets

X

Kathryn Admin	12 Apr 2018	None	+
Reine Admin	18 Apr 2018	None	+
Eped to Administrator	None	None	+

Begin

Bring an Employee Goal Into an Appraisal Quick Steps



Main Menu

My Employees

Employees Search...

MY EMPLOYEES

My Employees

9 Box

My Employees

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

No appraisals for this 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.

A Click MY EMPLOYEES.

B Click My Employees.

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.

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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

C

Click to expand the Actions menu.



No appraisals for this employee.



ACTIONS

 Continuous Feedback

 **Goals**

 Create New Appraisal

 View TTP

D

Click **Goals**.

Reine Hiring Manager
RT - Hiring Manager

PB:
Human Resources
RT Hotel 5*

Expand



No appraisals for this employee.



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Employees

Search...



My Employees / My Employees

Employee Goals

Reine Hiring Manager

Create Employee Goal

Filter

< < 1 > >

Displaying 1 - 1 of 1 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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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.

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

Employees

Search...



My Employees / My Employees

Administration

Performance

B

Scroll to the **Performance** section.

Appraisals

Appraisal Administration

Workflows

Goals

Continuous Feedback

C

Click **Workflows**.

Session Meeting Reasons

Learning

Courses & Classes

Classes

Class Evaluations

Courses

Test Templates

Tuition Assistance

Logistics

Buildings

Equipment

Rooms

Library

Library Resources

System Settings

Scales

Skills

Users

View Off-Boarded Users

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User Tools

Main Index

Integrations Setup

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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.

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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 | [List Icons] | [Link] [Unlink]

[Empty text area]



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

Equalize Weights **Normalize Weights to 100**

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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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 Competencies (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.

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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

+

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.

Selected Items

Total Weight

0.00

← Previous

Save Changes

Next →

Cancel

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

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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.

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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							

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Main Menu

My Employees

Employees

Search...



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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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 > »

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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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Open the Appraisal and View the Employee Goal

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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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

Click **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)

Click the down arrow to expand the selections.

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

Next Cancel

v16.0.1
Last sync

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

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 Quick Steps

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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.

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

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Deltak Talent Management Application Development Testing Company English

Main Menu My Employees Employees Search...

MY EMPLOYEES Click MY EMPLOYEES. (A)

My Employees Click My Employees. (B)

My Matrix Employee Performance

9 Box

Project Teams

Certifications

Development Learning

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

Reine Admin
PB:
Administration and General
RT Hotel 5*

Click Reine Hiring Manager Appraisal. (C)

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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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)

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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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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 N

START DATE 1/

TARGET DATE 1/

COMPLETION DATE

GOAL STATUS On Track

RELATED GOAL [Browse](#)

This concludes the Bring an Employee Goal Into an Appraisal quick steps.

General Appraisal Notes

[Add Journal Entry](#)

There are no journal entries.