

Create Employee Goals Quick Steps

1

Overview

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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

Dashboard

MY EMPLOYEES

RECRUITING

PERFORMANCE

LEARNING

SUCCESSION

CAREER CENTER

REPORTS

Employees

Main Dashboard

The high level steps required to create Employee Goals as an Employee and a Manager via Continuous Employee Goal Management are shown 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.

Begin

Create Employee Goals Quick Steps



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.

Create Employee Goals Quick Steps



Dashboard

Jobs ▾ Search... 🔍



RECRUITING

PERFORMANCE

- Approvals
- My Appraisals
- My Goals**
- Continuous Feedback

LEARNING

CAREER CENTER

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.

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[My Employees](#) / [My Employees](#)

Employee Goals

Reine Hiring Manager

 Filter

No Employee Goal.

Create Employee Goal

C

Click **Create 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.

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Employee Goals

Create New Employee Goal

View All

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.

IMPORT

EMPLOYEE

Reine Hiring Manager

GOAL NAME *

GOAL SCORE TYPE *

-- Select --

DESCRIPTION *

B I U [List Icons] [Link Icon]

[Text Area]



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.
- How? How 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?

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 Quick Steps



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.

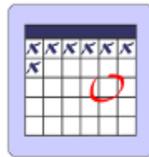
H Enter the date you anticipate completing the goal in the **Target Date** field.



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?

Submit

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.

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

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 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:

J

Click **Submit** when finished.

Submit

Ca

d/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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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.

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

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.

et More Widgets Tasks

Alerts

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

Show All

Empty content 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 Quick Steps



Main Menu

My Employees

Employees

Search...

MY EMPLOYEES

My Employees

9 Box

My Employees / My Employees

My Employees

Performance

« < 1 > »

Displaying 1 - 7 of 7

10 25 50

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



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

D Click Goals.

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.

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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.

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Employee Goals

Create New Employee Goal

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.

IMPORT

Browse Library

Browse Manager Goals

Browse Manager's Direct Reports

Browse Employee Completed Goals

F

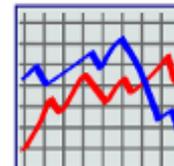
Click **Browse Library**.



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

EMPLOYEE

Kathryn Admin

GOAL NAME *

GOAL SCORE TYPE *

-- Select --

DESCRIPTION *

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.

Employees Search...

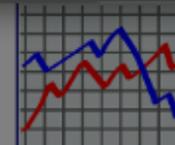
Browse Library

- ✔ 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

My Emp
Emp
Create
IMPOR
Brows
Brows
Brows
Report
Brows
Comp
EMPL
Reine
GOAL
GOAL
DESCRIPTION *



A Measurable goal stresses the need for concrete criteria

Create Employee Goals Quick Steps



GOAL NAME *

GOAL SCORE TYPE *

DESCRIPTION *

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

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

START DATE

TARGET DATE

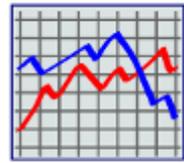
Goals can be assigned to employees as strategic objectives. They should be assigned to any

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 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 Quick Steps



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... 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?

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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

Reine Hiring Manager

START DATE

7/30/2019

GOAL NAME

Complete Continuing Education Course

TARGET DATE

12/31/2019

GOAL SCORE TYPE

Scale

RELATED GOAL

Q Browse

DESCRIPTION

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

PRIVATE

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 Quick Steps



Dashboard Jobs

- 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.

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 Quick Steps



- < Main Menu
- PERFORMANCE
- Approvals
- My Appraisals
- My Goals
- Continuous Feedback

Employee Goals

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

Filter

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 | | [Edit] [Change Status] [Archive] [Delete] |
| Complete Continuing Education Course | 0 | 7/31/2019 | 12/31/2019 | None | | [Change Status] |

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.

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 Quick Steps



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 > »

Showing 1 - 2 of 2 items per page

10

25

50

100

per page

GOAL NAME

STATUS

ACTIONS

Complete Certificati



Complete Continuing Education Course

0

7/31/2019

12/31/2019

None



This concludes the Create Employee Goals quick steps.