Deltek

# Deltek Talent Management 16.3

## Performance Administrator Guide

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# Performance Administrator Overview

Employees use the Deltek Talent Management Performance module for tasks related to employee performance, appraisals, continuous feedback, and goal setting.

## Performance Administration Menu

The Performance Administration menu contains administrative functions dealing with performance. This includes employee performance appraisals and goal-setting options.

### Display the Performance Administration Menu

Steps to access the Performance Administration menu.

1. Click in the toolbar to display the Administration menu.
2. Performance functions are listed on the Performance section.

### Contents of the Performance Administration Menu

From the **Performance** section, you can select the following features.

**Performance Administration Options**

| Field | Description |
|---|---|
| **Appraisal Administration** | This screen displays which employees have appraisals and which do not. You can launch appraisals individually or in bulk, and close appraisals. |
| **Workflows** | This screen allows you to configure all aspects of the employee appraisal process including the appraisal form content, rescheduling scale used, and more. Create new workflows and manage existing ones. |
| **Session Meeting Reasons** | This screen lets you add, modify and manage canned continuous feedback session meeting reasons, which users can select when creating a session. |
| **Continuous Feedback Administration** | This screen allows administrators with proper access to create individual sessions between managers and employees, view a list of launched sessions, edit sessions, cancel sessions, and bulk create sessions. Users with permission to access this screen have access to all employees they have permission to manage (for example members of the Administrator group can access all employees, while members of the HRBP and Matrix Manager groups can access employees in their reporting structure). |
| **360s Workflows** | This screen allows you to configure several sections of the 360 assessment process. |
| **Goals** | This screen lets you create and manage goals used within an appraisal. |

# 360s Workflow Section

The 360s Workflow Section contains administrative functions that allow you to configure several sections of the 360 assessment process using templates.

## Hide 360 Comments

When allowing managers the ability to review peer feedback and present a single narrative to the employee is necessary, administrators can configure 360 comments to be visible to Managers and hidden from Employees.

The System Setting that allows administrators to configure 360 comments to be visible to Managers and hidden from Employees is a global setting, which applies to all 360 Comments.

Note: A best practice when using 360 assessment is to encourage open discussion between managers, employees, and other participants. Because of this, consider carefully before hiding comments from employees.

**To Hide 360 Comments from Employees:**

1. Click **Administration » Global Settings » System Administration » System Settings**.
2. On the System Settings screen, click to expand the **Performance** section.
3. Browse to the **Hide 360 Comments** option and select a Value of **Yes** or **No** to hide, or not hide the comments.
4. Click **Update.**

## 360 Workflows

360 assessments are typically used by a manager for direct reports to rate the performance of a fellow employee.

360 assessments are useful in obtaining feedback from individuals outside an organization (for example your company's vendors or clients.

### Display the 360 Workflows Templates Screen

Follow these steps to display the Templates screen of the 360 Workflows module.

**To display the Templates screen of 360 Workflows:**

1. Click to display the Administration screen.
2. In the **Performance** » **360s** section, click **360 Workflows**.

## Contents of the 360 Workflow Templates Screen

The 360 Workflow Templates screen allows you to configure several sections for a 360 assessment.

### Columns

| Column | Field Definition |
|---|---|
| **Workflow Name** | This is the name of the 360 workflow. |
| **Date Created** | This is the creation date of the workflow. |
| **Associations** | This lists the associations selected in the workflow. |
| **Actions** | This displays the action options for each workflow template. |

### Actions

From the Action column, you can perform the following functions.

| Icon | Action | Description |
|---|---|---|
| | **Create New 360 Workflow** | Create a new 360 workflow. |
| | **View** | View the workflow description. |
| | **Edit** | Edit the workflow record. Editing done to the templates will only affect future appraisals that are cloned or created from the edited workflow. |
| | **Copy** | Copy a workflow to quickly create a new one. The screen displays the first step of the copied workflow with none of the previously selected associations chosen.<br>As you proceed through the wizard, any options chosen on the original workflow are preselected in the copied workflow. However, no step in the wizard is linked until you have passed that step.<br>Associations are not selected on a duplicate workflow because no two performance workflows can have the exact same associations |
| | **Make 360 Default** | Select a default workflow to use if the chosen associations in Step 1: Identification do not match associations with any performance workflows. A warning will display on the screen until a default workflow is selected. Employees not defined by associations from the listed workflows are assigned the default workflow. |

| Icon | Action | Description |
|---|---|---|
| | **Deactivated/Activated** | Set the activation status of the workflow. Deactivating a workflow ensures that it is no longer available for selection when creating appraisals. This action will affect any historical data associated with appraisals that were previously created with the workflow. Historical data will remain intact. |
| | **Delete** | Delete the 360 Workflow. |

## Create New 360 Workflows

Follow these steps to create new 360 Workflows.

**To create new 360 workflow:**

1. On the Templates screen, click **Create New 360 Workflow**.
2. Perform the steps in the multi-step wizard for each of the following steps:
   - Step 1: Identification
   - Step 2: Categories
   - Step 3: Content
   - Step 4: Review
3. Click **Finish**.

### Step 1: Identification

This step is for naming the workflow, selecting a scale for assessing an individual, and choosing the associations.

Associations help the system identify which 360 workflow is implemented when a 360 assessment is launched. Workflows can be as specific (for example: job type, job title, or employee name) or as general (for example: first tier organizational level) as your organization needs.

If no associations are selected, then the 360 workflow is designated as a company-wide 360 assessment.

*Identify the Workflow*

Enter information to define the workflow, such as name, description, and associations that will help match the workflow to employees.

**To identify the workflow:**

1. Complete the following fields:

| Field | Description |
|---|---|
| **Name** | Enter the name of workflow. This is a required field for the Identification step. The name that you enter here is displayed to a manager when performance workflow options are shown.<br>Deltek recommends that you select a name that clearly identifies the workflow with the appraisal you are designing (for example, if the appraisal is designed specifically for accounting clerks, you might name the workflow, **Accounting Clerks Appraisal**).<br>Because performance workflows can be submitted to participants outside of an employee's working area or outside of the corporation, labeling the workflow appropriately assists the manager in knowing which workflow he or she should use. |
| **Scale** | Indicate the scale to use to assess the employee. |
| **Allow Employees to Nominate Participants** | Select this check box to allow employees to suggest other participants for the 360 assessment to their manager. The manager makes the final determination whether or not to include the nominated participant. |
| **Description** | Provide more information about the workflow and the employees for which it is intended in this field. As with DHTML editors throughout the application, style and editing options such as bold text and bullets, as well as copy and paste functions, are enabled once the user clicks this field. |
| **Associations** | Select from the organizational hierarchy. The selections you make here determine which employees are matched with which performance workflow. Associations include:<br>▪ **Company/Division**<br>▪ **Location Group**<br>▪ **Location**<br>▪ **Job Family**<br>▪ **Job Role**<br>▪ **Job Classification**<br>▪ **Salary Grade**<br>▪ **Job Title**<br>▪ **Employees** |

2. Click **Next**.

### Step 2: Categories

Categories determine which areas are assessed in the 360 workflow.

The categories in the **Available Items** table are made up of any competency categories created for your organization and of skills. Categories are grouped together until the third step of the 360 workflow.

*Select and Reorganize Categories*

Steps to select the categories to include on the 360 workflow

**To select and reorganize categories:**

1. Click next to an item in the **Available Items** table to move the item to the **Selected Items** table.

   After the item is added to the **Selected Items** table, a **Weight** field displays the weight attributed to that category and an option to delete it from the table.
2. To change the order of items, click next to the item that you want to move.

   The order of items in the **Selected Items** table is the order in which the categories will display to the individual completing the appraisal.
3. Drag the row to the new position and drop.

*Fixing Weights*

The **Weight** fields in the **Selected Items** table allow you to type percentage values for each category if you want to revise the values generated by the system as the system will always equalize weights.

The **Total Weight** value updates each time a weight value is revised in the fields.

If the **Total Weight** value is over **100**, you have the option to click the **Equalize Weights** to spread the weights equally among the items.

You can also click **Normalize Weights to 100** to normalize the weights to 100. In this case, the application splits the weights according to the percentage emphasis in the fields.

Achievements do not have a weight value because achievements are not scored for an employee.

For example, if a three-way split was **65-40-25** and you clicked **Normalize Weights to 100**, the weights would adjust to **50-30.77-19.23**. The weights would still maintain their varying distribution, but would add up to **100**.

### Step 3: Content

This step is where you further specify the categories chosen in Step 2: Categories.

Each category selected in the previous step is expanded and displays the content available for that category. Content items for competencies have an information icon, which displays the description of that competency when you hover your computer mouse over the icon.

*Select Content*

Select and organize content available for each category.

**To select and reorganize categories:**

1. Click ➕ next to an item in the **Available Items** table to move the content item to the **Selected Items** table.

   After the item is added to the Selected Items table, a **Weight** field displays the weight attributed to that item and an option to delete it from the table. The **Total Weight** value automatically updates after each item is selected.

   The order of items in the **Selected Items** table is the order in which the categories will display to the individual completing the appraisal.
2. To change the order of items, click next to the item that you want to move.
3. Drag the row to the new position and drop.

*Add Categories under a Main Skill Category*

Follow these steps to add categories under a Main Skill category.

**To view available options and add categories under a main skill category:**

1. In the Main Skill Category section, click to expand that category.
2. Click ➕ next to the category to add it to the **Selected Items** table.

### Step 4: Review

This is the last step in the 360 Workflows wizard in which you can review all your selections and make changes before finalizing the workflow template.

**To make changes before finalizing a 360 workflow:**

1. Click Edit in the upper right hand corner of a section you want to edit.
2. Make changes, as necessary.
3. Click **Finish** when you are satisfied with the 360 workflow template selections.

## Goals Section

Use up to 35 words to describe this conceptual topic. Write complete sentences.

This is the start of your concept.

# Goals Library

Administrators create and manage goals used within an appraisal from this screen.

A goal library provides administrators with the ability to add goal categories and goals, which are then added to a Performance Workflow on the Categories and Content steps of the Performance Workflow Wizard. The library allows a manager to add similar goals to his or her direct reports when creating appraisals. An administrator can create goal categories as general or as specific for use within an organization.

**Note:** When you edit metrics information: such as competencies, goals, or skills: in the metrics library, the edits are automatically reflected in the workflows that use those values. This eliminates the need to manually update labels and descriptions on the Workflow screen and makes it easier to fix typographical errors and accommodate changes in terminologies used in your company's performance appraisal forms. To preserve the historical integrity of past appraisals, any edits made to labels and descriptions affect only those that are launched after administrators save their changes. Past appraisals and appraisals that are pending at the time of the edit are not modified.

## Display the Goals Screen

Follow these steps to open the Goals Library screen in the Performance Administration area.

**To access the Goals screen:**

1. Click ⚙ to display the Administration screen.
2. In the**Performance** section, click **Goals**.

## Contents of the Goals Screen

The Goals screen or Goals library displays the name of each goal category, which is available for inclusion in an appraisal on the Categories step of the Performance Workflow screen.

Each goal category has a linked value indicating the number of goals within that category.
To view the goals available in a category, click on either the linked category name or the linked value on the category row. All goals in the category have a name, a description, and a scoring type.

**Columns**

| Field | Description |
| --- | --- |
| **Category Name** | This is the list of previously created goal categories. |
| **Number of Goals** | This is the number of goals associated with a category. |

### Actions

The buttons and icons on the Goals screen perform the following functions.

| Field | Description |
|---|---|
| **Add a new Goal** | Add a new goal to a goal category. After submission, the goal is available for inclusion on an appraisal. When adding a goal it is good practice to follow SMART guidelines<br>(**S**pecific, **M**easurable, **A**ttainable, **R**elevant, and **T**ime Bound). |
| **Add a New Goal Category** | Add a new goal category. After submission, the goal category is available for inclusion on an appraisal. |
| **Edit** | Edit the goal category name. |
| / **Deactivated/Activated** | Deactivate or activate a goal category. |
| **Delete** | Delete a goal category. |

## Edit a Goal Category

Administrators can edit goal categories.

**To edit goal categories:**

1. On the Administration screen, in the Performance area, click **Goals**.
2. On the Goals screen, click  for the goal category you want to edit.
3. Enter the new **Goal Category Name**.
4. Click **Submit**.
   The window closes and the goal category is updated in the list of goal categories. If you try to change a goal category name to an existing name, you will receive an error.

## Add a New Goal Category

Using the Goals screen, you can add a new goal category as well as edit the name of an existing category.

**To add a goal category:**

1. On the Goals screen, click **Add a New Goal Category**.
2. Enter the **Goal Category Name**.
3. Click **Submit**.

The window closes and the new goal category is added to the list of categories with action options to edit, deactivate, and delete. The number of goals shown for the new category will show “0” and the option to delete is active.

## Delete a Goal Category

If a goal category has no goals added to it, the delete option ( ✖ ) is enabled. But, if a goal category has goal associations or is tied to date in the system, then the delete option is disabled.

**To delete goal categories:**

1. Click ✖ for a category to delete it.
2. When ask to confirm the deletion, click **OK**.

Similar to deactivating a goal category, when a category is deleted from use, the category name will no longer display as an option when creating or editing data that utilizes goals.

## Add a Goal

Administrators add goals on the Goals screen or on the Manage Goals screen. When creating goals it is good practice to follow the SMART guidelines and make goals Specific, Measurable, Attainable, Relevant and Time-bound.

**To add a new goal:**

1. On the Administration Screen, in the Performance area, click **Goals**.
2. On the Goals screen click **Add a New Goal** or click a Category Name or Number of Goals to access the Manage Goals screen and click **Add Goal**.
3. On the Add Goals screen, enter the **Goal Name**.
4. Select the **Goal Category Name** from the drop-down list.
5. Select the **Goal Score Type** from the drop-down list.
6. Enter the **Goal Description**.
7. Click **Submit**.

> **Note:** To return to the Goals library, click **View All Goals Categories**. To view a list of all goals in a given category, click **Back to Goals**.

## Manage Goals Screen

Add, Edit, Deactivate, Cascade and Rate Goals on the Manage Goals Screen.

While the Goals library screen allows access to add, edit, deactivate and delete goal categories, On the Manage Goal screen, administrators can edit, deactivate, cascade, and rate goals.
Administrators can click the Add Goal button to create a goal on either screen.

### Display the Manage Goals Screen

Display the screen on the Administration Goals library screen.

**To display the Manage Goals Screen:**

1. Click the Administration icon.
2. On the Administration screen, under the Performance section, click **Goals**.
3. Click the goal name, or the number in the Number of Goals column for the goal you want to manage.

### Contents of the Manage Goals Screen

Use the Actions menu to edit, activate, deactivate, cascade, or manage rating tips for goals.

**Contents**

Rating Tips are automatically added to any goal that uses the "Scale" score type. Rating tips provide further explanation of measuring the completion of a goal. For example, a rating tip for a goal may help a manager determine the most fair scale value to attribute to an employee for a goal on an appraisal.

When adding a **Scale** score type to an appraisal, the goal will use the scale defined by the performance workflow.

| Field | Description |
|---|---|
| **Goal Name** | The goal name |
| **Goal Description** | A short description of the goal |
| **Goal Score Type** | The type of scoring assigned to this goal. For example No score or Scale. |
| **Goal Rating Tips** | Yes or No, to indicate whether or not the goal has rating tips saved. |
| **Actions** | Depending on permissions, you may have the following actions available:<br>▪ **Edit**: Click to edit the goal.<br>▪ **Deactivate/Activate**: Select this option to toggle the goal between a state of Active or Deactivated. When a goal is deactivated, it is no longer available for selection on appraisals. If the goal is already associated with an appraisal, the association is not removed when the goal is deactivated.<br>▪ **Cascade**: Select this to add goals directly to one or more appraisal. For an appraisal to be eligible for having goals |

| Field | Description |
|---|---|
| | cascaded, the same goal category as the selected goal must be associated with the appraisal and the appraisal must be in the Planning or Performance phase.<br>▪ **Rating Tips**: Select this to manage Rating Tips, which provide further explanation for measuring the completion of a goal. For example, a rating tip for a goal may help a manager determine the most fair scale value to attribute to an employee for a goal on an appraisal. |
| **Delete** | Click the delete icon to remove the goal. Only those goals that are not used anywhere in Talent Management can be deleted. |
| **Add Goal** | Click to Add a goal to the goal library for the selected category. |
| **View All Goal Categories** | Click to return to the Goals Library screen. |

### Edit a Goal

Administrators can modify details, such as name or description, for an existing goal in the Goal Library.

**To edit a goal in the Goal Library:**

1. On the Administration Screen, In the Performance area, click **Goals**.
2. On the Goals screen, click a goal name.
3. On the Manage Goals Screen, for the goal you want to edit, click the ⋮ Actions menu icon.
4. Click **Edit**.
5. On the Edit Goals screen, modify fields such as Goal Description.
6. When finished, click **Submit**.

### Display the Initiate Cascading Goal Screen

Steps to display the screen on the Manage Goals Screen

**To display the Initiate Cascading Goal screen:**

1. Click the Administration icon.
2. On the Administration screen, under the Performance section, click **Goals**.

3. Click the goal name, or the number in the Number of Goals column for the goal you want to manage.
4. On the Manage Goal screen, in the row for the goal you want to cascade (copy to an appraisal), click the Actions menu.
5. Select **Cascade**.
   The screen opens to the Select Employees step.

### Initiate Cascading Goal Select Employees Step

Select employees with appraisals eligible to receive a goal. Ensure the employees selected have appraisals that contain the same goal category as the goal to be cascaded.

**Contents**

| Field | Description |
|---|---|
| **Company/ Division** | Select an organizational unit to narrow the list of employee appraisals for goal cascading. |
| **Manager** | Administrators can select a manager to include appraisals for that manager's direct reports. |
| **Select Filtering Options** | You can select options such as Location Groups, Locations, and Job Family, to narrow results. There is no limit to number of associations allowed when filtering employees to whom a goal is cascaded. However, choosing more associations limits the number of employees who will match all filtering options. Options include:<br>▪ Locations<br>▪ Job Family<br>▪ Job Role<br>▪ Job Classification<br>▪ Job Title<br>▪ Salary Grade<br>▪ **Employees**: Managers can click the **Employees** button and select direct reports to use when filtering results. |
| **Next/Cancel** | Click Next to move to the next step in the Cascading Goal process. Click Cancel to exit the process. |

### Initiate Cascading Goal Select Appraisals Step

Select an appraisal to cascade.

**Contents**

A list displays here of employees with multiple appraisals that meet step 1 criteria and that include the same Goal Category as the goal selected for cascading.

| Field | Description |
|---|---|
| **Name of Employee** | Select the appraisal you want to cascade the goal to. If there are no employees who have multiple appraisals who would be eligible to receive this goal, then all eligible employees have only one appraisal, and there is no need to clarify which appraisal is the correct one. |
| **Previous/Next/ Cancel** | Click **Next** to move the Review step. Click **Previous** to return to the Select Employees step. Click **Cancel**to exit Cascading Goals. |

### Initiate Cascading Goal Review Step

View a list of employees who will receive the cascaded goal, and a list of those who will not.

**Contents**

| Field | Description |
|---|---|
| **Employees Who Will Receive the Cascaded Goal** | This table lists details of employees who will receive the goal, such as the employee name and appraisal name. Click the employee name to open the employee's profile. Click the appraisal link to open the appraisal. |
| **Employees Who Will Not Receive the Cascaded Goal** | This table lists details such as employee name, employee ID, and job title for all employees who will not receive the goal. |
| **Previous/Finish/Cancel** | Click **Finish** to finalize the process of cascading goals. Click **Previous** to return to the Select Appraisals step. Click **Cancel**to exit Cascading Goals. |

### Display the Goal Rating Tips Screen

Steps to display the screen on the Manage Goals screen.

**To display the Goal Rating Tips screen:**

1. Click the Administration icon.
2. On the Administration screen, under the Performance section, click **Goals**.

3. On the Manage Goal screen, in the row for the goal whose rating tips you want to manage, click the ⋮ Actions menu.

4. Select **Rating Tips**.

### Contents of the Goal Rating Tips Screen

Use the screen to add or edit tips to provide guidance for managers rating completion of a goal. Tips display for any goal that uses the **Scale** score type.

**Contents**

| Field | Description |
|---|---|
| **Column of Scales** | On the left side of the screen all available scales display. Click on a Scale to view scale values on the right. |

| Field | Description |
|---|---|
| **Scale Values** | For each scale value, click the Edit icon to enter or edit a tip that will guide a manager on when to select this value to rate an employee's progress in meeting this goal. |

| Field | Description |
|---|---|
| **View All Goals Categories** | Click to return to the Goals library, which lists all goal categories. |

| Field | Description |
|---|---|
| **Back to Goals** | Click to return to the Manage Goals screen, which lists all goals within the selected category. |

# Continuous Feedback Section

The Continuous Feedback section contains administrative functions to allow administrators to manage and launch feedback sessions, individually and in bulk, and to define default session meeting reasons.

## Session Meeting Reasons Screen

Administrators add, modify, and manage default continuous feedback session meeting reasons, which users can select when launching a session.

Deltek Talent Management ships with several session reasons, which display in a list on the Session Meeting Reasons screen, and which can be selected from the **Meeting Reason** field on the Create New Continuous Feedback Session screen.

Administrators can edit these reasons, add new reasons, select which reason will be the default selection that displays on the Create New Continuous Feedback screen, deactivate reasons so they no longer appear for selection in the Meeting Reason field, and delete session reasons.

Note that you cannot delete a session reason once it has been selected in a session.

## Display the Session Meeting Reasons Screen

Access the Session Meeting Reasons screen from the Performance Section on the Administration screen.

**To display the Session Meeting Reasons Screen:**

1. Click the Administration icon.
2. In the Performance section, beneath Continuous Feedback, click **Session Meeting Reasons**.

## Contents of the Session Meeting Reasons Screen

Use fields and actions to create pre-defined meeting reasons that managers and employees can select when creating continuous feedback sessions.

**Contents**

| Field | Description |
|---|---|
| **Meeting Reason** | The options that will display for selection from the Meeting Reason field on the Create New Continuous Feedback Session screen. |
| **Employee Discussion Points** | A check mark displays in this column if employee discussion points have been saved for this meeting reason. If no check mark displays, click the Edit icon to add discussion points that the employee can use to help facilitate the conversation. |
| **Manager Discussion Points** | A check mark display in this column if manager discussion points have been saved for this meeting reason. If no check mark displays, click the Edit icon to add discussion points that the manager can use to help facilitate the conversation. |
| **New Session Meeting Reason** | Click to create a new reason, which employees and managers can then select when creating a session. |
| **Edit** | Click to modify details of the session meeting reason. |
| **Default/Not Default** | A grey check mark indicates the option is not set as the default. A black check mark indicates the option is the default. The default meeting reason will display in the Meeting Reason drop-down on the Create New Continuous Feedback Session screen. |
| **Activated/ Deactivated** | The Activated icon, an unlocked icon, indicates the option is Active, which means it is available for selection from the **Meeting Reason** drop-down on the Create New Continuous Feedback Session screen. The Deactivated icon, a locked icon, indicates the option is deactivated, which |

| Field | Description |
|---|---|
| | means it will no longer be available for selection from the **Meeting Reason** drop-down. |
| **Delete** | Click to remove the reason from the list. |

## Contents of the View Continuous Feedback Meeting Reason Screen

View employee and manager discussion points defined for a saved meeting reason.

**Contents**

View the meeting reason name and a list of employee and manager discussion points defined for the meeting reason. Click **View All** to return to the Session Meeting Reasons screen.

## Create a New Session Meeting Reason

Add a session meeting reason to the pre-defined list of reasons shipped with Deltek Talent Management.

**To add a new session meeting reason:**

1. Click the Administration icon.
2. On the Administration screen, in the **Performance** section under **Continuous Feedback**, click **Session Meeting Reasons**.
3. On the Session Meeting Reasons screen, click **New Session Meeting Reason**.
4. Enter information in the fields on the form.
    - **Meeting reason:** Enter a name or phrase to describe this meeting reason. This text will display as an option from the **Meeting Reason** drop-down on the Create New Continuous Feedback Session screen.
    - **Employee Discussion Points:** Enter one or more suggestion for an employee to use to encourage a productive discussion related to the reason for this meeting. For example, a discussion point for a project retrospective meeting may include, "Ask what I can improve upon."
    - **Manager Discussion Points:** Enter one or more suggestion for a manager to use to encourage a productive discussion related to the reason for this meeting. For example, a discussion point for a project retrospective meeting may include, "What were the major roadblocks?"
5. Click **Submit**.

### Edit a Session Meeting Reason

Modify saved session meeting reasons.

**To edit a session meeting reason:**

1. Click the Administration icon.
2. On the Administration screen, in the **Performance** section under **Continuous Feedback**, click **Session Meeting Reasons**.
3. On the Session Meeting Reasons screen, click the edit icon in the Actions menu for the session meeting reason you want to edit.
4. Modify information in the fields on the form.
   - **Meeting reason:** Enter a name or phrase to describe this meeting reason. This text will display as an option from the **Meeting Reason** drop-down on the Create New Continuous Feedback Session screen.
   - **Employee Discussion Points:** Enter one or more suggestion for an employee to use to encourage a productive discussion related to the reason for this meeting. For example, a discussion point for a project retrospective meeting may include, "Ask what I can improve upon."
   - **Manager Discussion Points:** Enter one or more suggestion for a manager to use to encourage a productive discussion related to the reason for this meeting. For example, a discussion point for a project retrospective meeting may include, "What were the major roadblocks?"
5. Click **Submit**.

## Continuous Feedback Administration Screen

Administrators use the Continuous Feedback Administration screen to launch feedback sessions, individually or in bulk, and to edit or delete sessions.

Sometimes Administrators need access to launch feedback sessions, either individually, or in bulk. These functions, as well as other actions like editing or deleting session details, are available on the Continuous Feedback Administration screen.

### Display the Continuous Feedback Administration Screen

Administrators use the Continuous Feedback Administration screen to view a list of employees with scheduled feedback sessions, and to launch, edit, and cancel sessions.

To access this screen, an Administrator must first enable the Continuous Feedback Administration feature for the Global group, then for any specific user group, for example, **Administrator)** (**Administration » Global Settings » System Administration » Features. Performance » Continuous Feedback » Continuous Feedback Administration**.)

**To display the Continuous Feedback Administration screen:**

1. Click the Administration icon.
2. In the Performance section, beneath Continuous Feedback, click **Continuous Feedback Administration**.

## Contents of the Continuous Feedback Administration Screen

Administrators use the fields and options on the Continuous Feedback Administration screen to view launched feedback sessions, to launch individual sessions, or to access the Bulk Continuous Feedback Actions screen, where they can launch and manage sessions in bulk.

**Filter**

| Field | Description |
|---|---|
| **Filter Options** | Define filter options to narrow the list of employees displayed. Options include filtering by a date range, division, job details, session status, and more. When options are selected, click **Filter**. Click **Click Here** under Clear Filter to remove all filters and display the full list. |

**Employee List**

| Field | Description |
|---|---|
| **Employee Name** | The employee name. If an arrow displays to the left, click to expand a list of scheduled sessions. |
| **Employee ID** | A unique numeric identifier for a given employee. |
| **Manager** | The manager of the selected employee. |
| **Job Title** | An employee's title. |
| **Company/Division** | The company or division associated with an employee. |
| **Location** | This office location to which an employee is assigned. |

**Actions**

The following actions are available via buttons at the top of the screen, or under the Actions menu.

| Field | Description |
|---|---|
| **Bulk Continuous Feedback Actions button** | Click to display the Bulk Continuous Feedback Actions screen, where you view and manage requested bulk launch sessions, |

| Field | Description |
|---|---|
| | and where you launch the Bulk Launch Continuous Feedback wizard. |
| **Launch a new Continuous Feedback Session icon** | Click to open the Continuous Feedback screen where you can specify details of the selected employee's feedback session, such as the reason for the meeting and the participants. |
| **Edit icon** | Click to edit the continuous feedback session details. |
| **Cancel icon** | Click to cancel the session. |

### Bulk Continuous Feedback Actions Screen

Use the Bulk Continuous Feedback Actions screen to view a list of your bulk launch requests, and to bulk launch a new batch of sessions.

Administrators can manage their In Progress and Completed bulk launch sessions on this screen, and can click the Bulk Launch Continuous Feedback Session button to launch a new batch of sessions.

*Display the Bulk Continuous Feedback Actions Screen*

Access the Bulk Continuous Feedback Actions screen from the Continuous Feedback Administration screen.

**To display the Bulk Continuous Feedback Actions screen:**

1. Click the Administration icon.
2. In the Performance section, beneath Continuous Feedback, click **Continuous Feedback Administration**.
3. Click the **Bulk Continuous Feedback Actions** button.

*Contents of the Bulk Continuous Feedback Actions Screen*

Use the Bulk Continuous Feedback Actions screen to view a list of your bulk launch requests, and to bulk launch a new batch of sessions.

**Contents**

| Field | Description |
|---|---|
| **Date Created** | The date the bulk launch request was created. |

| Field | Description |
|---|---|
| **User** | The name of the user who created the bulk launch request. |
| **Recommended Date** | Set a recommended date for participants to complete the session information. Managers can edit the actual date and time they want to hold the session after the sessions are bulk launched. |
| **Status** | The state of the request for a bulk launch of continuous feedback sessions.<br>▪ **In Progress**: This indicates that the request has been sent, and the date for the launch has not yet arrived.<br>▪ **Pending Launch**: This indicates the bulk launch has begun processing.<br>▪ **Completed**: This indicates all sessions specified in the bulk launch request have been created. |
| **Associations** | The filters selected to determine which employees are included in the bulk launch of continuous feedback sessions. |

**Actions**

The following actions are available by clicking the buttons at the top of the screen, or the icons under the Actions menu.

| Field | Description |
|---|---|
| **Bulk Launch Continuous Feedback Session** | Click to launch the Bulk launch wizard, where you specify session details, such as the type of session, the recommended date by which the session should occur, and the participants, and where you select the employees for the bulk launch. |
| **Continuous Feedback Administration** | Click to return to the Continuous Feedback Administration screen. |
| **View icon** | Click to view and modify details of the bulk launch request. This option is disabled if the status is Pending Launch or Completed. |
| **Cancel icon** | Click to cancel the bulk launch request. |

## Bulk Launch a Continuous Feedback Session

Use the Bulk Launch Continuous Feedback Session wizard to specify session details, such as subject, meeting reason, session participants, and a recommended date, and to select employees to include in a bulk launch of feedback sessions.

To access the Bulk Launch Continuous Feedback Session screen, you must belong to a group with access to the Continuous Feedback Administration feature (**Administration » Global**

**Settings » System Administration » Features. Performance »Continuous Feedback » Continuous Feedback Administration**).

**To bulk launch a batch of continuous feedback sessions:**

1. Click **Administration » Performance » Continuous Feedback Administration**.
2. On the Continuous Feedback Administration screen, click the **Bulk Continuous Feedback Actions** button
3. Click the **Bulk Launch Continuous Feedback Session** button.
   Step 1 of the Bulk Launch Continuous Feedback Session wizard displays.
4. In the **Subject** field, enter the reason for the meeting.
5. In the **Recommended Date** field, set a recommended date for participants to complete the session information. Managers and Employees can edit the actual date and time they want to hold the session after the sessions are bulk launched.
6. In the **Meeting Reason** field, select from a list of default meeting reasons defined by an administrator, such as **General Check-in**.
7. In the **Upload Attachment** field, browse to a file or document to associate with the meeting.
8. In the **Scheduling** field, select to **Create Sessions Tonight** or **Schedule Launch for a Future Date**. If scheduling for a future date, enter the date in the **Scheduled Date** field.
9. In the **Select Participants by Name** field, click the **Select** button and select additional participants for all sessions in the bulk launch, searching by name.
10. In the **Select Participant by Relationship** field, select additional participants for all sessions in the bulk launch, by role.
11. Click **Next**.
12. On Step 2 of the wizard, use any of the fields on the screen (Company/Division, Job Title, Job Family, Job Role, Job Classification, Salary Grade, Exemption Type, Union) to filter the selection of employees for which you are launching a continuous feedback session.

    **Note:** The Union field uses the value from the user profile, not the job profile.

13. Click **Next**.
14. On Step 3 of the wizard, review session details, and return to previous screens to edit, if necessary.
15. When done, click**Finish**.

## Contents of the View Bulk Continuous Feedback Actions Screen

Administrators view a list of all sessions in a given bulk launch.

**Contents**

Administrators can view details for all sessions within the selected bulk launch. Click on the session name to view and manage the session details on the Continuous Feedback Sessions screen.

# Appraisals Section

The Appraisals section of Performance Administration contains administrative functions that allow administrators to manage and launch appraisals individually and in bulk, manage all aspects of the appraisal workflow, and configure default printing settings for appraisals.

The Appraisals section of Performance Administration contains three administrative functions, Appraisal Administration, Workflows, and Print Configuration, that allow administrators to manage and launch appraisals individually and in bulk, manage all aspects of the appraisal workflow, and configure default global printing settings for appraisals.

## Appraisal Administration Screen

The Appraisal Administration screen displays all the employees in the system and indicates who has appraisals and who does not.

The filters allows you to find employees who do not have an active appraisal, employees that have been terminated, closed appraisals, and more.

### Display the Appraisal Administration Screen

Follow these steps to display the Appraisal Administration screen.

**To access the Appraisal Administration screen:**

1. Click to display the Administration screen.
2. In the **Performance** » **Appraisals** section, click **Appraisal Administration**.
3. The Appraisal Administration screen displays the list of active employees.
   Click **Filter** to refine this listing.

### Contents of the Appraisal Administration Screen

Administrators view a list of all employees, identify those with or without appraisals, and perform actions such as launching a new appraisal.

**Contents**

The Appraisal Administration screen displays the following columns.

| Field | Description |
|---|---|
| **Employee Name** | This is the name of the employee to be appraised. |
| **Employee ID** | This is the employee ID. |
| **Manager** | This is the name of the employee manager. |

| Field | Description |
|---|---|
| **Job Title** | This is the employee job title. |
| **Job Family Name** | This is the employee job title. |
| **Company/Division** | This is the company/division the employee is under. |
| **Location** | This is the location of the employee. |
| **Job Type** | This is the employee job type. |

**Actions**

The buttons and icons on the Appraisal Administration screen perform the following functions.

| Field | Description |
|---|---|
| **+ Launch a New Appraisal** | Click this icon to launch a new appraisal. |
| **Bulk Appraisal Actions** | Click this button to launch appraisals for the entire organization or specific segment thereof all at once. |
| **Reassign Appraisals** | Click this button to access the Reassign Appraisals screen where you can bulk reassign appraisals. |
| **Send Employees a Letter** | Click this button to send a letter to employees with additional appraisal process information. |

## Components of an Appraisal

Typically, there are four parts to an employee's appraisal. The system is configurable, so you do not necessarily need to use the default parts.

### Planning

Planning is the first step of an effective performance management process.

It typically involves a meeting between the appraiser (manager) and the appraised (employee). The purpose of the Planning phase is to set expectations of, and goals for, the employee's performance for the review period.

During the planning meeting, the employee and manager should agree on the individual's key job responsibilities, develop the goals and objectives that need to be achieved, identify competencies the individual must display in doing the job, and create an appropriate individual development plan.

### Performance

The Performance phase is the second step in the appraisal process.

Once the planning has been completed, it is time to execute the plan. For the individual, the critical responsibility here is getting the job done, achieving the objectives, and making notations of these milestones in the journal.

The appraiser has two major responsibilities:

- Creating the conditions that motivate; and
- Confronting and correcting any performance problems.

In an effective performance appraisal system, performance execution also includes continuous communication and feedback, along with a midterm review to assure that performance is on track.

### Assessment

Assessment is the third step of an effective performance appraisal system.

Basically, the assessment phase involves evaluating just how well the individual has performed and filling out the appraisal form. The assessment phase could include input from an employee self-assessment, a direct manager, and secondary managers as well as matrix managers and peers.

### Review

The Review is the final step of the appraisal process.

It involves the individual and the manager discussing the appraisal in its entirety. This is also the perfect opportunity for HR to review the appraisal and make suggestions for improvement to help ensure that appraisals are appropriate. Most often, both manager and employee will digitally sign the review phase to indicate that it has completed.

## Launch a New Appraisal

Follow these steps to launch a new appraisal on the Appraisal Administration screen.

**To launch new appraisals:**

1. In the **Actions** column of the Appraisal Administration screen, click + to launch a new appraisal and enter the **Appraisal Name**.
2. From the **Appraisal Source**, select **Best Fit** to launch a workflow based on an association criteria, or select **Choose a Workflow** to manually select a workflow record.
3. Click **Submit**.

   This returns you to the Appraisal Administration screen where the employee now has an active appraisal listed.

If the employee does not already have a primary appraisal, the appraisal that you launched using steps 1–3 above is automatically marked as the primary appraisal.

For employees who already have active appraisals, click ▸ next to an employee's name to display the appraisal(s).

## Bulk Appraisal Actions Screen

Administrators use this screen to view details about bulk launches, bulk closures, and batch appraisal updates based on a workflow update.

### Display the Bulk Appraisal Actions Screen

Follow these steps to display the Bulk Appraisal Actions screen.

**To access the Bulk Appraisal Actions screen:**

1. Click ⚙ to display the Administration screen.
2. In the **Performance** » **Appraisals** section, click **Appraisal Administration**.
3. Click the **Bulk Appraisal Actions** button.

### Contents of the Bulk Appraisal Actions Screen

Depending on configuration, the Bulk Appraisal Actions screen contains up to three sections, Bulk Launch Appraisals, Bulk Close Appraisals, and Bulk Appraisals Workflow Update.

After an administrator creates a bulk launch or bulk closure, or edits a workflow associated with appraisals, the event is displayed in a table where you can view the details of each action.

**Bulk Launch Appraisals Columns**

| Column | Description |
|---|---|
| **Date Created** | The date the bulk launch appraisal action was created. |
| **User** | This indicates the user who initiated the bulk launch action. |
| **Launch Date** | This indicates the date the action has or will take place. |
| **Status** | This indicates whether the process is pending or completed. |
| **Workflow** | This indicates the workflow associated with the bulk launch appraisal action. |
| **Associations** | This indicates associations for which appraisals are being launched. |
| **Actions** | Click the View icon to view the details of a completed action. If you need to cancel a launch process that is still pending, click the ✖ Delete icon. |

#### Bulk Close Appraisals Columns

| Column | Description |
|---|---|
| **Date** | This is the date of the appraisal. |
| **User** | This indicates the user who initiated the bulk close action. |
| **Status** | This indicates whether the process is pending or completed. |
| **Workflow(s)** | This indicates the workflow associated with the bulk close appraisal action. |
| **Actions** | Click the View icon to view the details of a completed action. |

#### Batch Appraisal Workflow Update

| Column | Description |
|---|---|
| **Date** | This is the date the change was made to the workflow. |
| **User** | This indicates the user who made the change. |
| **Status** | This indicates whether the process of updating all appraisals associated with the workflow (including launched appraisals that have not yet reached the assessment phase) is pending or completed. |
| **Workflow(s)** | This indicates the name of the updated workflow. |
| **Actions** | Click the View icon to view the details of a completed action. If you need to cancel a process that is still pending, click the ✖ Delete icon. |

#### Actions

| Button | Description |
|---|---|
| **Bulk Launch Appraisals** | Click to access the Bulk Launch Appraisals screen. |
| **Bulk Close Appraisals** | Click to access the Bulk Close Appraisals screen. |
| **Appraisals Administration** | Click to access the Appraisal Administration screen. |

### Bulk Launch Appraisal

Follow these steps to bulk launch appraisals.

**To bulk launch appraisals:**

1. On the Bulk Appraisal Actions screen, click **Bulk Launch Appraisals**.
2. Perform the steps in the multi-step wizard for each of the following steps:

- Step 1: Select Performance Workflow
- Step 2: Select Employees
- Step 3: Review

3. Click **Finish**.

*Step 1: Select Performance Workflow (Bulk Launch)*

In this step, you select a performance workflow to use for the bulk launch. If no options are selected for either sections, the default is used.

**To select performance workflow:**

1. Select the following in the **Appraisal Source** section:

| Option | Description |
|---|---|
| **Best Fit Workflow** | Select this to use a workflow chosen by the system based on the options selected in Step 2: Select Employees. |
| **Choose Workflow** | Select this to choose a workflow from the drop-down list populated with available performance workflows. |

2. Choose the following in the **Scheduling** section:

| Option | Description |
|---|---|
| **Launch Appraisals Tonight** | Select this to launch appraisals over night. This gives large batches time to process without impacting performance. |
| **Schedule Launch for a Future Date** | Select this to set a date in the **Scheduled Date** field by either typing a date value in the field or choose using the date picker to select a date |

3. Click **Next** to proceed to the next step in the wizard.

*Step 2: Select Employees (Bulk Launch)*

In this step, you use filter criteria to select employees to include in the bulk launch. If no filter criteria is selected, all eligible employees are included in the bulk launch.

**To select employees:**

1. Enter any or all of the following filter criteria to limit the employees for the bulk launch.

| Criteria | Description |
|---|---|
| **Company/Division** | Click **Select Organization Unit** to select a company/ division. |
| **Manager** | Select the manager. |
| **Location Groups** | Select the location groups. |

| | |
|---|---|
| **Locations** | Select the locations. |
| **Job Family** | Select the job family. |
| **Job Role** | Select the job role. |
| **Job Classification** | Select the job classification. |
| **Job Title** | Select the job title. |
| **Salary Grade** | Select the salary grade. |
| **Date** | Select the Start Date or Hire Date. The Start Date is the date the employee started in the current position. The Hire Date is the date the employee was originally hired by the company. This field is used in conjunction with the next two fields. |
| **Date From** | Select the date when the employee started their current position. |
| **Date To** | Select the date when the employee was hired. If you use the Applicant Tracking System, this is the date when the **Status** of the employee was set to **Hired**. |
| **Exclude These Employees** | Click the **Search for Employees** button to search for employees who should not be included in the appraisal launch. |

2. Click **Preview** to view the list of employees who match the filter criteria that you have selected.
3. Click **Next** to proceed to the next step in the wizard.

*Step 3: Review (Bulk Launch)*

Each step in the wizard is linked to allow you to easily return to that step to make any changes.

The Review screen displays the configuration and choices for both the workflow selection and the employees who will receive the bulk launched appraisal.

**To review the bulk launch appraisals:**

1. Review the options that you have chosen for the bulk launch.
2. Click 

for any section you want to change.
3. Click **Finish** after you have reviewed the details of the bulk launch.

### Bulk Close Appraisals

Follow these steps to select what should be closed in the bulk close appraisal action, and what to do with incomplete appraisals.

**To bulk close appraisals:**

1. On the Bulk Appraisal Actions screen, click **Bulk Close Appraisals**.
2. Perform the steps in the multi-step wizard for each of the following steps:
   - Step 1: Select Performance Workflow
   - Step 2: Review
3. Click **Finish**.

*Step 1: Select Performance Workflow (Bulk Close)*

In this step, you select the appraisals to close and the action to take for incomplete appraisals.

**To select performance workflow:**

1. For the **For All Workflows** option, take one of the following actions:
   - Click **Yes** if you want to close the appraisals for all workflows.
   - Click **From Specific Workflow** to enable the **Select Workflows** field that list the workflows that you can select that you want to bulk close.
2. For incomplete appraisals, click **Do Nothing** to instruct Deltek Talent Management to take no action when it encounters an incomplete appraisal. Click **Cancel** to delete the appraisal.
3. Click **Next** to proceed to the next step in the wizard.

*Step 2: Review (Bulk Close)*

In this step, you can confirm what actions to take or make changes to the previous step.

**To review the bulk close actions, complete the following steps:**

1. Click Edit to enter any changes.
2. Click **Finish** to initiate the Bulk Close Appraisal process.
3. Click next to a bulk close appraisal action to view the details of the action.

## Reassign Appraisals Screen

Administrators use the Reassign Appraisals Screen to reassign appraisals in bulk.

### Display the Reassign Appraisals Screen

Follow these steps to display the Reassign Appraisals Screen.

**To access the Reassign Appraisals screen:**

1. Click ⚙ to display the Administration screen.
2. In the **Performance** » **Appraisals** section, click **Appraisal Administration**.
3. Click the **Reassign Appraisals** button.

### Contents of the Reassign Appraisals Screen

Administrators use the Reassign Appraisals screen to reassign a batch of appraisals to other appraisal managers.

**Step 1: Filter Section**

| Field | Description |
|---|---|
| **Managers** | Click **Select Manager** to narrow the list of appraisals based on appraisal manager. In the Search Manager dialog, enter keywords or select search parameters, then click **Search** to return a list of managers and make your selection(s). |
| **Workflow Name** | Select a workflow to use to filter appraisal results. Only appraisals based on the workflow you select display in the table. |

**Step 2: Select Employee(s) Section**

| Field | Description |
|---|---|
| **Search Employee** | Click **Search Employee** to select which appraisal managers to include as options for selection in the **Reassign To** field. Leave the dialog's filter fields blank and click **Search** to return a list of all of appraisal managers from all active appraisals. Enter search parameters in the fields to narrow the results returned. Make your selection from the list and click **Confirm Selection**. |

**Contents**

| Field | Description |
|---|---|
| **Employee Name** | The employee who is being appraised. Click to open the employee's profile. |
| **Appraisal Name** | The name of the appraisal. Click to open the appraisal. |

| Field | Description |
|---|---|
| **Appraisal Manager** | The name of the appraisal manager assigned to the employee. |
| **Current Phase** | The active phase for this appraisal (Planning, Performance, Assessment, Review). |
| **Appraisal Launch Date** | The date this appraisal is schedule to launch. |
| **Reassign To** | Select one of the options from the list. The managers available for selection are determined by the selection made in Step 2 on this screen. |
| **Reassign** | After you make all your selections in the **Reassign To** field, click this button at the bottom of the screen to reassign the appraisals. |

## Send Employees a Letter Screen

Occasionally you may need to send notifications that contain additional appraisal process information to employees.

This can be achieved via a two-step wizard.

### Display the Send Employees a Letter Screen

Follow these steps to display the Send Employees a Letter screen.

**To access the Send Employees a Letter screen:**

1. Click  to display the Administration screen.
2. In the **Performance** » **Appraisals** section, click **Appraisal Administration**.
3. Click the **Send Employees a Letter** button.

### Send Employees a Letter

Follow these steps to send employees notifications that contain additional appraisal process information.

**To send employees a letter:**

1. On the Appraisal Administration screen, click **Send Employees a Letter**.
2. Perform the following steps:
   - Step 1: Select Employees and Letter
   - Step 2: Review
3. Click **Finish**.

*Step 1: Select Employees and Letter*

In this step, select employees that you want to send the letter to.

**To select employees:**

1. Enter any or all of the following filter criteria to select the employees. If no filters are selected, all applicable employees will display in the results.

| Criteria | Description |
|---|---|
| **Company/Division** | Click **Select Organization Unit** to select a company/division. |
| **Manager** | Select the manager of the employees. |
| **Location Groups** | Select the location group of the employees. |
| **Locations Management** | Select the locations of the employees. |
| **Job Family** | Select the job family of the employees. |
| **Job Role** | Select the job role of the employees. |
| **Job Classification** | Select the job classification of the employees. |
| **Job Title** | Select the job title of the employees. |
| **Salary Grade** | Select the salary grade of the employees. |

2. In the Select a Letter Template drop-down list, select a letter to send. Letter templates already saved in your system will display in the drop-down list.

   **Note:** Click to see a preview of the selected letter template.

3. Click **Next** to proceed to the next step in the wizard.

*Step 2: Review (Send Letter)*

In this step, you can review the criteria used for selecting employees.

**To review:**

1. Review the recipient list, the subject, and the content of the notification. If necessary, return to any of the previous steps by clicking links to those steps on the wizard to make any required edits.
2. Click **Finish**.

   A progress bar displays to indicate the progress of the send process.

# Workflows

Administrators use Appraisal Workflows to create new workflows and manage existing ones.

Workflows determine and define the Who, What, When, and How of the appraisal process. On the Workflows screen, administrators configure all aspects of the employee appraisal process, including appraisal form content, scheduling, the scale used, and more.

## Display the Workflows Screen

Follow these steps to display the Workflows screen.

**To access the Workflows screen:**

1. Click to display the Administration screen.
2. In the **Performance** » **Appraisals** section, click **Workflows**.
3. Click **Filter** and select filter criteria to refine the list from all workflows to only those you wish to display.

## Contents of the Workflows Screen

The Workflows screen displays the following columns and actions.

**Columns**

| Column | Description |
|---|---|
| **Workflow Name** | This indicates the name of the appraisal workflow. |
| **Type** | This indicates the appraisal workflow type. |
| **Date Created** | This indicates the date when the workflow was created. |
| **Last Modified** | This indicates the date when the workflow was last edited. |
| **Modified by** | This indicates the user who last edited the workflow. |
| **Associations** | This lists the associations selected in the workflow. |
| **Auto Scheduled** | This indicates if the appraisal workflow is scheduled to run automatically. |
| **Action** | This shows the action options for each workflow template. |

**Actions**

The buttons and icons on the Workflows screen perform the following functions.

| Icon | Action | Description |
|---|---|---|
| | **Create New Workflow** | Create a new workflow. |

| Icon | Action | Description |
|---|---|---|
| | **View** | View the workflow description. |
| | **Edit** | Edit the workflow record. Editing done to the templates will only affect future appraisals that are cloned or created from the edited workflow. |
| | **Copy** | Copy a workflow to quickly create a new one. The screen displays the first step of the copied workflow with none of the previously selected associations chosen.<br>As you proceed through the wizard, any options chosen on the original workflow are preselected in the copied workflow. However, no step in the wizard is linked until you have passed that step.<br>Associations are not selected on a duplicate workflow because no two performance workflows can have the exact same associations |
| | **Default Workflow** | Select a default workflow to use if the chosen associations in the first step (Identification) do not match associations with any performance workflows. A warning will display on the screen until a default workflow is selected. Employees not defined by associations from the listed workflows are assigned the default workflow. |
| | **Deactivated/Activated** | Set the activation status of the workflow. Deactivating a workflow ensures that it is no longer available for selection when creating appraisals. This action will affect any historical data associated with appraisals that were previously created with the workflow. Historical data will remain intact.<br>Deactivated workflows are not shown by default on the Workflows page, but can still be accessed by using the option in the filter section. |
| | **Delete** | Delete the workflow. |

### Unfinished Workflows

Any workflows that you may have started and decided to finish later are displayed at the top of the screen.

Click the name of the workflow to complete it or continue working on it. You may also delete the workflow if you decide you no longer need it by clicking .

### Create/Edit a New Workflow

Follow these steps to create a new workflow, or to edit a workflow.

**To create new workflows:**

1. Click to display the Administration screen.
2. In the **Performance** » **Appraisals** section, click **Workflows**.
3. On the Workflows screen, click **Create New Workflow**.

   **Note:** You can edit a workflow at any time by clicking the Edit icon in the Actions menu for any workflow listed. All changes made will update any appraisals based on the workflow, including launched appraisals that have not yet reached the assessment phase. If an appraisal has multiple assessment phases, edits flow through to launched appraisals prior to the first assessment phase. All changes made are processed at the end of the day, when the associated Workflow is updated.

4. Perform the steps in the multi-step wizard for each of the following steps:
   - 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
5. When done, click **Finish.**

*Step 1: Identification*

This step is for naming the workflow, selecting the workflow type, and making the associations.

Associations help the system identify which performance workflow to implement when you launch an appraisal. Workflows can be as specific (for example: job type, job title, or employee name) or as general (for example: first tier organizational level) as your organization needs. If no associations are selected, the performance workflow is designated as company-wide.

Identify the Workflow

Enter details like name, workflow type and description.

**To identify the workflow:**

1. Complete the following fields:

| Field | Field Description |
|---|---|
| **Workflow Name** | Enter the name of workflow. This is a required field for the Identification step. The value that you enter here is displayed to a manager when performance workflow options are shown.<br>It is recommended that you select a name that clearly identifies the workflow with the appraisal you are designing: for example, if the appraisal is designed specifically for accounting clerks, you might name the workflow, **Accounting Clerks Appraisal**.<br>Because performance workflows can be submitted to participants outside of an employee's working area or outside of the corporation, labeling the workflow appropriately assists the manager in knowing which workflow he or she should use. |
| **Workflow Type** | Select the type of workflow being created. Typically there are three types of workflow: **90 Day Review**, **Annual Appraisal**, and **Goals**. However, the administrator has the ability to add more types through the drop-down and the multi-select lists. |
| **Description** | Provide more information about the workflow and the employees for which it is intended in this field. As with DHTML editors throughout the application, style and editing options such as bold text and bullets, as well as copy and paste functions are enabled once the user clicks this field. |
| **Associations** | Select from the organizational hierarchy. The selections you make here determine which employees are matched with which performance workflow. Associations include:<br>▪ **Company/Division**<br>▪ **Location Group**<br>▪ **Location**<br>▪ **Job Family**<br>▪ **Job Role**<br>▪ **Job Classification**<br>▪ **Salary Grade**<br>▪ **Job Title**<br>▪ **Employees** |

2. Go to the Associations section.

### Add Company/Division Associations

Follow these steps to add company/division associations to a workflow.

You add Company/Division associations on the Identification Step when creating a Performance Workflow.

**To add Company/Division associations:**

1. On the Identification step on the Workflow screen, in the **Associations** section, click **Select Organizational Unit**.

   A modal window opens with a hierarchy view of the organizational structure previously created by the administrator.
2. Expand the structure to reveal any additional divisions or departments.
3. Click the division name to select an organizational level, and click **Select**.

   The Company/Division will display the hierarchy view of your chosen division.
4. Select options in the Associations fields: Location Group, Location, Job Family, Job Role, Job Classification, Salary Grade, Job Title.
5. Continue to Add and Remove Employees.

### Add and Remove Employee Associations

Follow these steps to add or remove employee associations from a workflow.

**To add and remove Employee associations:**

1. On the Identification step on the Workflow screen in the **Associations** section, click **Select Employees**.

   A modal window opens to create filters to search for internal users.
2. Click **Search Filter** to expand the view for search filters, and click **Search** to display the results in a table.

   The available search filters include:

   - **Name**
   - **Organizational Unit**
   - **Job Family**
   - **Job Title**
   - **Location Group**
   - **Location**
   - **Job Role**
   - **Manager**
3. Click ✚ in the **Actions** column to add an individual employee.

You can also select multiple employees at once by selecting the check box next to each employee that you want to add.

4. Click **Add All Selected**. The names are added to the **Current Selection** table.
5. Click to remove employees from the table.
6. When done selecting employees, click **Confirm Selection**.
7. Click **Next** to move to Step 2 of the create workflow process.

Workflow Example

Workflow A is created with the **Location** set to **Dallas** and the **Organizational Entity** set to **Headquarters**.

When a manager begins an appraisal for John Smith from Dallas Headquarters, Deltek Talent Management first searches the database for a workflow that is specifically associated with John Smith. If no workflow is found, Deltek Talent Management then continues to look for John's job title, then the location: in this case, **Dallas**: and finally the organizational entity: in this case, **Headquarters**.

Because workflow A is associated with Dallas, it will be assigned to John Smith. Deltek Talent Management will not need to continue searching for the organizational entity. If no workflow is found, employees are automatically assigned to the workflow that is designated as the default.

When you create a workflow, clicking the **Finish Later** button saves the workflow in its current state to the **Unfinished Workflows** table.

When you edit a workflow, clicking the **Save Changes** button saves the revisions made to the workflow and displays the table of workflows.

*Step 2: Categories*

Categories determine which areas are rated in the appraisal.

The categories in the **Available Items** table are made up of any achievements, competency categories, goals, and skills created for your organization. Skills are grouped together until the third step of the performance workflow.

Select and Organize Categories

Select the categories of content to include on the appraisal.

**To select and reorganize categories:**

1. Click next to an item in the **Available Items** table to move the item to the **Selected Items** table.

   After the item is added to the **Selected Items** table, a **Weight** field displays the weight attributed to that category and an option to delete it from the table.
2. To change the order of items, click next to the item that you want to move.

   The order of items in the **Selected Items** table is the order in which the categories will display to the individual completing the appraisal.
3. Drag the row to the new position and drop.

### Fixing Weights

The **Weight** fields in the **Selected Items** table allow you to type percentage values for each category if you want to revise the values generated by the system as the system will always equalize weights.

The **Total Weight** value updates each time a weight value is revised in the fields.

If the **Total Weight** value is over **100**, you have the option to click the **Equalize Weights** to spread the weights equally among the items.

You can also click **Normalize Weights to 100** to normalize the weights to 100. In this case, the application splits the weights according to the percentage emphasis in the fields.

Achievements do not have a weight value because achievements are not scored for an employee.

For example, if a three-way split was **65-40-25** and you clicked **Normalize Weights to 100**, the weights would adjust to **50-30.77-19.23**. The weights would still maintain their varying distribution, but would add up to **100**.

### Dynamically Add Employee Goals to an Appraisal

Employee goals are created by employees or managers outside the Appraisal process, but when needed administrators can dynamically add active employee goals to appraisals. They do this on the Workflows screen.

**To dynamically add active employee goals to an appraisal:**

1. To dynamically add a goal to a completed workflow, click the Edit icon for the selected workflow. To dynamically add a goal to an unfinished workflow, click the workflow name.
2. On the Categories step, Click the add icon next to **Employee Goals**.
3. In the Selected Items list, equalize or normalize the weights of added items, as needed.
4. On the Content step, locate the Employee Goals Available Items list and click the add icon next to **Include Active Employee Goals**.
   By adding the **Include Active Employee Goals** item, all active goals saved for an employee in Continuous Goal Management (Employee Goals screen) will be added to the appraisal.
5. Any goals added to the Employee Goals category on the Goals library screen can also be added to the appraisal. Click the add icon next to any other Employee Goals.
6. In the Selected Items list, add weights for each goal, as needed.
7. Click **Next** when finished.
8. On the Content step, locate Employee Goals in the list of Available Items and click the add icon.
9. Enter information on the remaining steps, if desired.
10. When finished, review details on the Review step and click **Finish**.

*Step 3: Content*

This step is where you further specify the categories chosen in Step 2: Categories.

Each category selected in the previous step is expanded and displays the content available for that category. Content items for competencies have an information icon, which displays the description of that competency when you hover over the icon with your mouse.

**Add Employee Goals from Continuous Goal Management and Competencies and Skills from Job Profiles**

If Employee Goals was selected in Step 2, select the **Include Active Employee Goals** option in this step to dynamically pull an employee's active goals into an appraisal.

If **Job Competencies (Competency)** and **Main Skill (Skill)** categories were selected in Step 2, you can select the competencies/skills from the job profile. In doing this, the competencies and skills listed in the job profile for the individual being evaluated are automatically added to the appraisal.

Select Content

Select and organize content available for each category.

**To select and reorganize categories:**

1. Click next to an item in the **Available Items** table to move the content item to the **Selected Items** table.

   After the item is added to the Selected Items table, a **Weight** field displays the weight attributed to that item and an option to delete it from the table. The **Total Weight** value automatically updates after each item is selected.

   The order of items in the **Selected Items** table is the order in which the categories will display to the individual completing the appraisal.
2. To change the order of items, click next to the item that you want to move.
3. Drag the row to the new position and drop.

Add Categories under a Main Skill Category

Follow these steps to add categories under a Main Skill category.

**To view available options and add categories under a main skill category:**

1. In the Main Skill Category section, click to expand that category.
2. Click next to the category to add it to the **Selected Items** table.

Locking Categories

Administrators have the ability to lock a category for competencies, skills, and goals.

Locking a category prevents a manager from revising the items selected by the workflow or altering the weights for those items on an appraisal.

If a competency, skill, or goal does not have its category choices locked, the manager can exclude or add other items in a category on an appraisal.

Lock a Category

Steps to lock a category.

**To lock a category:**

On the Content step of the Performance Workflow, select the **Lock Category** check box next to a competency, skill, or goal that you want to lock.

Managing Weights

The **Weight** fields in the **Selected Items** table allow you to enter percentage values for each content item if you want to revise the values generated by the system as the system will always equalize weights.

The **Total Weight** value updates each time a weight value is revised in the fields.

Revise Weight Values

Change default weight values.

**To revise the weight values generated by DTM:**

Enter a value in the Weight field for each item in the Selected Items table.

In this step of the workflow, the **Total Weight** values are not required to have a sum of 100 percent for any category. If an administrator saves the total weight value as less than 100, then that workflow category provides a manager who is creating an appraisal with the ability to add other items in that category, even if that category is "locked". For example, if the administrator locks the **Job Competencies** category with the **Total Weight** value equaling **75**, then a manager creating an appraisal for a direct report can add other competencies on that appraisal for the other **25** percent.

Note that on an appraisal, each category is required to have a sum of **100** percent.

*Step 4: Scale*

In this step, you select which scale is associated with the performance workflow.

If a default scale was chosen when the scales were created, then that scale name is shown in the drop-down list and the scale details are displayed on the screen. You must choose a value for the **Scale** drop-down because the workflow must contain a means of rating the performance of the individual.

Select the Scale for a Workflow

Steps to associate the scale, which will be used to rate performance, with a workflow.

**To select the scale to associate with the performance workflow:**

1. Select a scale from the **Scale** drop-down list.
   The details of the selected scale display on the screen. Details may include:
   - **Levels** available in that scale
   - **Range** value for each level
   - **Comments** required for a level
   - **Description** of the rating
     Viewing the details for the scale provides administrators the opportunity to select the scale that best fits the performance workflow.
2. Click **Next**.

*Step 5: Phases*

This step enables you to configure which performance phase types are included in the workflow.

A workflow must have at least one phase where scoring is performed. Scoring can be done in assessment or review phases. You cannot have a workflow which only contains a Planning phase. However, a phase type can be repeated more than once in a workflow.

Review the definition of a phase type by hovering over the information icon.

Add or Modify Phase Type

Add, rename, delete, and reorganize phase type.

**To add, rename, delete, and reorganize phase type:**

1. Click to add a phase type to the Workflow Phases table.
   Continue adding phase types to the workflow until you have included all the types necessary for the workflow. Adding a phase type does not remove that type from the Phase Types table since you can add a phase type to a workflow more than once. For example, if your organization wants to include a mid-year performance phase and an end of the year performance phase, the workflow will accommodate that process.
2. In the text box next in the **Phase Name** column, enter a new name to rename the phase if you want it to more closely match the terminology used in your organization. This is particularly useful in distinguishing repeat phases.
3. Click to delete a phase type from the workflow.
4. To change the order of items, click the left corner of the row that
   The order of phases in the Workflow Phases table is the order in which the phases will display in the appraisal.
5. Drag the row to the new position and drop.
6. Click **Next**.

*Step 6: Configuration*

Follow these steps to select which actions are available in each phase.

**To select which actions are available in each phase:**

1. Check the actions you want to include from the following sections:
   - Achievements
   - Competencies and Skills
   - Goals
   - Performance Journal
   - Scoring: You can configure appraisals based on the current workflow without a scoring phase by unchecking the **Allow Scoring** option in the Assessment and Review phases.

   > **Note:** Each section (Achievements, Competencies and Skills, etc.) displays on the Configuration step even if it was not selected in a previous step. Within each section are columns associated with the phases selected in Step 5: Phases. The column headers display the name given to each phase.
   >
   > Check boxes indicate that more than one option can be selected. Radio buttons indicate that only one option can be selected for that item.
   >
   > When a section applies to the manager and the employee, the same actions to **Add**, **Edit**, or **Delete** display for both user groups.
   >
   > If you select an action check box for a user, the cell is highlighted green. If an action check box is not selected for a user, the cell is highlighted red. If an action is not available for a phase or category, **N/A** displays in a white cell.

2. Click **Next**.

Achievements

The Achievements section allows revisions during any phase.

This is primarily because achievements include kudos, milestones, and accomplishments of an individual which are earned throughout the year. These entries are a good supplement to the other activities that may be directly related to other content within the appraisal (for example, an entry in the journal for a goal). Achievements are not scored in an appraisal.

Competencies and Skills, and Goals

The Competencies and Skills section and the Goals section items are rated within an appraisal.

No tasks are available during an assessment or review type phase. Similarly, tasks are not listed for the Scoring section and the Approvals/Signatures section during a planning or performance type phase because scoring is not necessary until after the Performance phase has occurred. Signatures can be added to any phase.

### Performance Journal

The Performance Journal section items are comparable to the Achievements section.

Entries in the journal are not scored. These entries are included in the appraisal for the purposes of noting events throughout the appraisal year. It provides a means for employees to make notations of achievements or occurrences during the year that they might otherwise forget. Journal entries are also useful as a method of documenting communication and feedback between the manager and the employee. Performance Journal entries have different permission settings to allow different users from adding, editing, or deleting the entries.

### Scoring

The Scoring section has two task options.

These options are:

- **Allow Scoring:** If selected, this permits the scoring of an appraisal during an assessment type phase and a review type phase. If unselected, scoring is not required on the appraisal and all information related to appraisers, scale and viewing scores will be hidden.
- **Manually Release Score to Employee:** If selected, this indicates that the manager will manually trigger the release of the score for the employee to view. If not selected, the application will automatically release the score to the employee as soon as the appraisal score is calculated and the appraisal is moved to the Review phase.

### Approvals and Signatures

In this section, selecting the option to **Require Approval** states that an appraisal cannot move to the next phase until those individuals selected in Step 8: Approvals have approved the appraisal.

There are three signature options for each phase type in the workflow:

- **No Signatures Required**: This is the default. If you select this option, then the manager can move the appraisal to the next phase without a direct report seeing the appraisal.
- **Manager Signs First**: This indicates that the appraisal cannot move to its next phase until both the manager and employee have signed off on the appraisal. With this option, the manager must be the first to sign the appraisal.
- **Employee Signs First**: This indicates that the appraisal cannot move to its next phase until both the manager and employee have signed off on the appraisal. With this option, the employee must be the first to sign the appraisal.

*Step 7: Appraisers*

This step gives administrators the ability to add other user groups as an appraiser to a performance workflow.

Only the **Assessment and Review** phase types allow scoring. If only one phase has scoring enabled, that phase must have a **Phase Weight** of **100** percent. If more than one phase has the option for appraisers, then the combined weight of all the phases must be **100**.

A phase can be included in this step in the workflow and have a **Phase Weight** of **0** as long as there is another phase with a **Phase Weight** of **100**.

### Add or Delete Appraiser Types

Steps to add or delete appraiser types.

**To add and delete appraiser types:**

1. Click ➕ in the Available Items table to move an appraiser type to the Selected Items table.

   After the appraiser type is added to the Selected Items table, a text field displays the weight attributed to that item and an option to delete it from the table. The participants may be weighted differently each time. The **Total Weight** value automatically updates after each item is selected.
2. Click ✖ in the **Action** column to delete an appraiser from the Selected Items table.

### Appraiser Types

The available appraiser types are as follows:

- **Self Assessment**: This is the individual for whom the appraisal was created.
- **Matrix Manager Assessment**: This is the manager to whom the employee indirectly reports, or also commonly referred to as a dotted-line manager.
- **Peer Assessment**: This typically includes those individuals who are on the same level within the organization as the employee, but other hierarchy levels may be added as appraisers.
- **360 Assessment**: This may include users within the organization and individuals outside of the company.
- **Level 1 Manager Assessment**: This is the manager to whom the employee directly reports.
- **Level 2 Manager Assessment**: This is the supervisor of the manager to whom the employee directly reports.
- **Level 3 Manager Assessment**: This is the supervisor of the Level 2 Manager.

### Select Appraisal Order

Follow these steps to select the appraisal order.

**To select appraisal order:**

1. Check one of the following appraisal order options:
   - **Appraise in Serial Order**: Appraisers will score the appraisal one at a time and in a specific order determined by the order in which the appraisers are listed in the Selected Items table.

- **Appraise Parallel (No Order)**: Appraisers will score the appraisal concurrently and in no particular order.

2. If you selected **Appraise in Serial order**, you can rearrange the order by clicking in the row that you want to move, dragging that appraiser to the new position and dropping.

### *Step 8: Approvals*

This step allows administrators to select approval chains and approvers for the performance workflow.

Individuals selected in this step are tasked with approving an appraisal after scoring has been completed by users who were chosen in Step 7: Appraisers. Typically the act of approving an appraisal is between the Assessment phase and the Review phase because scoring is usually done in the Assessment phase.

#### Select Approval Chains

If your organization created approval chains, follow these steps to select an approval chain:

**To select an approval chain:**

1. Select one or more options from the Select Approval Chain options.
2. Click **Select**.

#### Select Approvers

Follow these steps to select an approver.

**To select an approver:**

1. Select an option from the **Approval Chain Type** field.
   - **Serial**: This approval chain type requires that those in the chain to approve or reject the action in a specific order. If an individual in the chain rejected the action, then the succeeding individuals will not receive the request to approve or reject the action.
   - **Parallel:** This approval chain type has no approval order restrictions, unlike Serial approval chain types. All selected individuals receive the request simultaneously. However, if at least one individual on the approval chain rejects the action, then the action is rejected.
2. Select one of the following:
   - **Internal Approvers**: These approvers are current employees and users of your application. Click Internal Approvers to open the Internal Approvers window. You can search by Employee Name to find individuals who directly report to another manager, or display all the internal users in the application by clicking the Search button.
   - **External Approvers**: These are individuals who are either not employed by your organization or not users of the application. In the Enter External Approvers field, type the email address of the external approver for the performance workflow. To add

more than one external approver, either type each email address on a separate line or use a comma to separate each address.

- **Managerial Level**: This type of approver is selected based on his or her manager level within the organizational hierarchy and how that relates to the appraisal being approved. To select a manager level, click to select the desired **Manager Level**.

> **Note:** To select more than one manager level, hold down the **Ctrl** key (Windows) or the ⌘ key (Mac) and click on the manager level you want to select. If an employee has the option checked on his or her User Profile to be skipped if added as an approver, that employee will not receive an approval request even if employed in that manager level.

3. Click **Next**.

*Step 9: Approval Order*

This step is necessary if you selected **Serial** for the **Approval Chain Type** in Step 8: Approvals.

Each approver for the serial approval chain is shown in a box, regardless of approver type. If **Parallel** was chosen for the **Approval Chain Type**, then an appropriate message is displayed and the administrator can continue to the next step in the wizard.

There is no limit to the number of times you can revise the order of the approvers. The order of the approvers on this step indicates in which sequence the approvers will receive his or her notification to approve an appraisal after it is scored by the appraisers.

Reorder Approvers

Steps to change order of approvers in a workflow

**To change the order of the approvers:**

1. Click of the row that you want to move.
2. Drag the row to the new position and drop.

*Step 10: Scheduling*

This is an optional step that allows administrators to configure the scheduling of the different phases selected for the workflow.

In this step you can select advance notifications addressed to the manager and/or employee at the end of each phase and/or notifications addressed to the manager and/or employee when a phase change occurs

Select Notification Options and Template

Set the schedule for appraisals following this workflow and specify options for notifications related to an appraisal.

**To select the following notification options and what template to use:**

Select one of the following options:

- **No Schedule**: Selecting this type disables the available actions in the table. Any appraisal following this performance workflow will require the manager to manually move the appraisal from phase to phase until its completion.
- **Calendar**: Selecting this type enables the **Manual Phase** radio button in the **Scheduled** column of the table. Clicking the **Scheduled Phase** radio button for any phase enables the following options for that row:
  - Drop-down lists for month and day values in the **End Date** column
  - Check boxes to enable notifications for **Manager** and **Employee**
  - Text box in the **Advance Notifications** column to indicate the number of days before an advanced notification is sent. This field must contain a positive integer if either Employee or Manager is selected to receive an advanced notification.
- **Original Date of Hire (Anniversary)**: Selecting this type sets the employee's date of hire as the basis for the assessment schedule. The **End Date** column displays a text field to type a positive integer for the **Days after Hire** field. This allows administrators to select how many days after the employee's hire date a specific phase ends and changes to the next phase.
- **Date of Hire for Current Position (Anniversary)**: Selecting this type sets the employee's date of hire in his or her current position as the basis for the assessment schedule. The **End Date** column displays a text field to type a positive integer for the **Days after Hire** field. This allows the administrator to select how many days after the employee's hire date to his or her current position that a specific phase ends and changes to the next phase.

Notifications

The functionality available in the Advance Notifications and the Notifications areas are similar for each schedule type.

Selecting the **Employee** check box enables the drop-down list of custom templates that are available for use on the appraisal. Selecting the **Manager** check box enables the drop-down list of custom templates that are available for use on the appraisal. This allows you to set different notifications for the two different user types.

For each template you select, you can perform the following functions.

| Icon | Action | Description |
|---|---|---|
| | **View** | Click this to view the template. This launches a modal window showing the letter template details, tabs for each available language in which the template is translated |
| | **Edit** | Click this to edit the template. |

Edit Letter Templates

Follow these steps to edit letter templates.

**To edit letter templates:**

1. Click for the selected template. This opens the letter in the Edit window.
2. Enter your changes to the letter template, and click **Submit** to submit the changes to the performance workflow.

   The edits are applied only to the version sent to the employee or the manager selected for the appraisal. The edits are not saved to the original version in the application.

*Step 11: Review*

This is the last step in the performance workflow wizard in which you can review all your selections and make changes before finalizing the workflow.

**To make changes before finalizing a workflow:**

1. Click Edit in the upper right hand corner of a section you want to edit.
2. Make changes, as necessary.
3. Click **Finish** when you are satisfied with the workflow selections.

*Multi-Function Workflow Scenario*

If you wanted to create a workflow for an entity called “West Coast Sales” but you had an East Coast salesman that for some reason should be appraised along with West Coast Sales, you can specify that the workflow pertains to the organizational entity and the employee.

This way you would need only to create one workflow for every person who needs the workflow parameters.

## Print Configuration Screen

Administrators use the Print Configuration screen to configure default appraisal print options for their organization, which determines how all phases of the appraisal display in Print View, and how they will look when printed.

The feature must be enabled before it is available from the Appraisals section. Administrators can configure the options to lock appraisal users from modifying the default printer settings, or to allow appraisal users to override the default options in Step 1 of the Appraisals Print workflow.

### Enable the Appraisal Global Print View Configuration Feature

When you enable the Appraisal Global Print View Configuration feature, Performance administrators can configure default appraisal print options for the organization, which determine how all phases of the appraisal display in Print View, and how they look when printed to PDF or hard copy. This feature can be configured to allow an appraisal user to override the default options selected, or to lock all appraisal users from making changes to default print settings.

Before enabling the Global Print Configuration feature for an administrator, it must be enabled for the Global group, to turn it on in Talent Management. To do this, follow the steps below, but select the Global group from the Select a Group field in step 2.

**To enable the Global Print Configuration feature:**

1. Click **Administration » Global Settings » System Administration » Features**.
2. On the Features screen, select the **Administrator** group from the **Select a Group** field, or the whatever group you want to enable this feature for.
3. Expand **Performance » Appraisal**.
4. Click **Global Print View Configuration**.
5. Select one or more of the following options. You must select **Print Configuration Screen** to enable the ability to set global print options:

| Option | Description |
|---|---|
| **Lock Configuration** | When selected, Step 1 of the Print Appraisal Workflow is read-only. Appraisal users cannot change print options set by an administrator. When **Lock Configuration** is unchecked, appraisal users can edit the default print options in Step 1 of the process.<br><br>**Note:** If the **Lock Configuration** option is unchecked and if the **User Print View Configuration** feature is enabled, the settings selected by the appraisal user are saved for all future appraisals. Users can also restore options to the default set by the administrator by clicking the **Restore Default View** button on Step 1 of the Print Appraisal screen. |
| **Print Configuration Screen** | Click this option to enable the **Print Configuration** option in the **Performance » Appraisals** section of the Administration screen (**Administration » Performance » Appraisals » Print Configuration**). From the Print Configuration screen, administrators define global print options for appraisals. |

6. Click **Update Features**.

## Display the Print Configuration Screen

Follow these steps to access the Print Configuration Screen.

**To display the Print Configuration screen:**

1. Click to display the Administration screen.
2. In the **Performance** » **Appraisals** section, click **Print Configuration**.

## Contents of the Print Configuration Screen

Administrators select options on the Print Configuration Screen to define default printing settings for appraisals.

**Contents**

| Field | Description |
|---|---|
| **Check All** | Check to include every available section. |
| **Phases** | Select the sections to include for each phase - Planning, Performance, Assessment, and Review. If a section is not relevant for a particular phase, **N/A** displays. To include every available section in a particular phase, select the check box in the column heading for that phase. |
| **Information/ Content/Summary Sections** | Select or de-select the options to include. If a section or sub-section has a blue arrow, you can click the arrow to display all options and select or de-select, as desired. |
| **General Appraisal Notes/Journal Entries/Appraisal Review Comments** | If you select **General Appraisal Notes**, **Journal Entries**, or **Appraisal Review Comments**, you can choose to include comments based on the **Comment can be viewed by** setting selected by the person who entered the comment:<br>▪ **All**: The entry can be viewed by administrators, managers, appraisers, and the employee.<br>▪ **Employee**: The entry can be viewed by administrators and the employee.<br>▪ **Managers**: The entry can be viewed by administrators and managers only.<br>▪ **Other Raters**: The entry can be viewed by administrators, managers, and other raters.<br>▪ **Private**: The administrator and the person entering the note are the only ones who can view a private entry. |
| **Submit Button** | Click to save default print settings. |

## Configure Global Appraisal Print View Options

When configuring default appraisal print options for your organization, administrators determine how all phases of the appraisal display on the Print View screen (Step 2), in PDF Format, and in print to hard copy.

To use this feature, it must be enabled. For more information, see Enable Global Appraisal Print View Configuration.

**To configure global appraisal print options:**

1. Click **Administration » Performance » Appraisals » Print Configuration**.
2. On the Print Configuration screen, select what you want to include when printing:
   - To include every available section, select **Check All**.
   - To include every available section in a particular phase, select the check box in the column heading for that phase.
   - If a section or sub-section has a blue arrow, you can click the arrow to display all options and select or de-select, as desired.
   - If you select **General Appraisal Notes**, **Journal Entries**, or **Appraisal Review Comments**, you can choose to include comments based on the **Comment can be viewed by** setting selected by the person who entered the comment:
     - **All**: The entry can be viewed by administrators, managers, appraisers, and the employee.
     - **Employee**: The entry can be viewed by administrators and the employee.
     - **Managers**: The entry can be viewed by administrators and managers only.
     - **Other Raters**: The entry can be viewed by administrators, managers, and other raters.
     - **Private**: The administrator and the person entering the note are the only ones who can view a private entry.
3. Click **Submit**.

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