

Add Goals to an Appraisal Via the Performance Workflow

1

Create a Goal in the Goals Library

2

Add a Goal to a Performance Workflow

3

Create an Appraisal Based on the Workflow

4

View the Goal Added to the Appraisal

Dashboard

MY EMPLOYEES

RECRUITING

PERFORMANCE

LEARNING

SUCCESSION

CAREER CENTER

REPORTS

Employees

Refresh, Logout

Main Dashboard

In this click-thru, you will learn how an Administrator adds a goal to an appraisal by creating a goal in the Goals Library and adding it to a Performance Workflow.

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

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

Get More Widgets

X

Begin

Kathryn Admin

12 Apr 2018

None

Rene Admin

18 Apr 2018

None

Eped to

None

None

Administrator

Best viewed in IE or Adobe PDF Reader.

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Employees

Search...



My Employees / My Employees

Administration

Performance

B

Scroll to the Performance section.

Appraisals

360s

Appraisal Administration Workflows

360 Workflows

Continuous Feedback

Goals

C

Click **Goals**.

Goals

Session Meeting Reasons

Learning

Courses & Classes

Logistics

Classes

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Courses

Rooms

Test Templates

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View Off-Boarded Users

Support Tools

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Click the Administration icon.

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Goals

Add a New Goal

Add a New Goal Category

« < 1 2 > »

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CATEGORY NAME ▾

AB - Healthcare Goals

5



COMPLETE/INC GOAL

3



CTY - Gundam Goals Category

2



CTY - Kamen Rider Goals Category

2



CZ - Goal Category

2



DC-Goal Category

1



Employee Goals

2



Goals

0



D

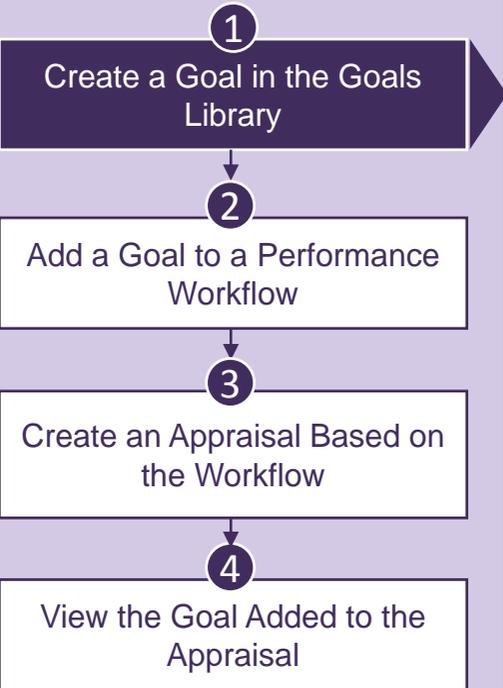
Click Add a New Goal.

Goal Categories available for use throughout Deltek Talent Management display in the grid. The value in the Number of Goals column indicates the number of goals in that category. On this screen Administrators can create new categories and new goals, as well as edit, activate/deactivate and delete existing goal categories. You cannot delete a category if it is already in use.

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

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Add Goals to an Appraisal Via the Performance Workflow



My Employees / My Employees

Goals

Add Goals

Options available when creating a goal in the Goals Library vary slightly from those available when adding goals within an appraisal or within the Continuous Employee Goal Management process.

[View All Goals Categories](#) [Back to Goals](#)

GOAL NAME *

E Enter a **Goal Name**.

GOAL CATEGORY NAME *

F Select a **Goal Category** to associate with the goal.

GOAL SCORE TYPE *

G Select a **Goal Score Type**, such as **Percentage Complete**. If you are not scoring the goal on the appraisal, select **No Score**.

GOAL DESCRIPTION *

B **I** **U** [List icons] [Link icon] [Unlink icon]

H Enter a short **Description** of the goal.



SMART goals need to be **Specific**. To make goals specific, exactly what is going to be accomplished, why it is to be involved. A specific goal will usually answer the following questions:

What do I want/need to accomplish? Include requirements and constraints.
Is this goal beneficial and purposeful?
Who is involved?

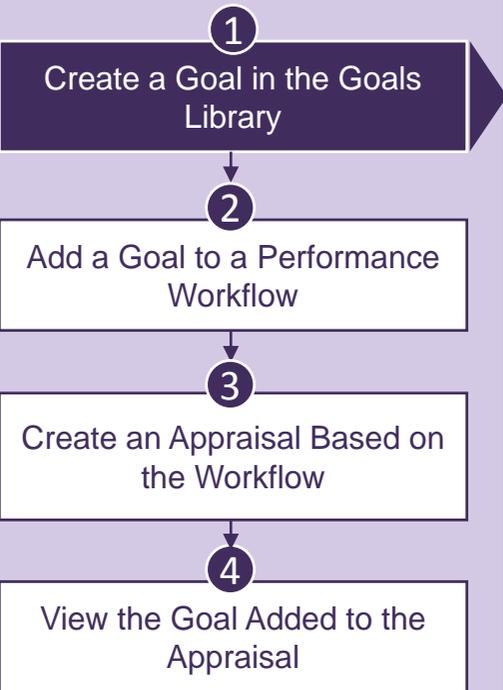
A **Measurable** goal stresses the need for concrete criteria

for measuring progress toward the attainment of the goal. It also discusses what success looks like once the goal is completed. A measurable goal will usually answer questions such as:

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

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

Add Goals to an Appraisal Via the Performance Workflow



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

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Creating Relevant goals means choosing goals

that are relevant and align to the organization, department and employee's success and development. A relevant goal can answer yes to these questions:

- Does this seem worthwhile/necessary to the organization, department and individual?
- Is this the right time to pursue this goal?
- Does this goal align with our organization's key priorities/strategy?
- Am I the right individual to accomplish this goal?



Time-bound goals are set within a time frame, giving

them a target date. A commitment to a deadline helps focus efforts on completion of the goal on or before the due date. A time-bound goal will usually answer the question:

- When is this due, or when must this be completed/implemented?

Submit

Cancel

Click **Submit**.

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Manage Goals

Sales

On the Manage Goals screen, the goal displays in the grid.

« < 1 > »

Displaying 1 - 1 of 1 per page

GOAL NAME ▾	GOAL DESCRIPTION	GOAL SCORE TYPE ▾	GOAL RATING TIPS	ACTIONS
Secure 2 Verified Leads for your Pipeline	Add at least 2 qualified leads to your pipeline by the end of Q4.	Percentage Complete	No	✕ ⋮

The Secure 2 Verified Leads for your Pipeline goal is now available to be added to a Performance Workflow.

On the Goals Library screen, the Number of Goals for this category increases by 1

CATEGORY NAME ▾	NUMBER OF GOALS	ACTIONS
Sales	1	✎ 🔒 ✕
SK - Time Goals	2	✎ 🔒 ✕
SK - Work Goals	0	✎ 🔒 ✕
SLIDER GOAL (NA)	3	✎ 🔒 ✕

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Employees

Search...



My Employees / My Employees

Administration

Performance

B

Scroll to the Performance section.

Appraisals

360s

Appraisal Administration

360 Workflows

Workflows

C

Click Workflows.

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Workflows

You can create a new workflow or add a goal to an existing workflow. We'll edit an existing Performance Workflow.

Create New Workflow

Reine's Workflow	Annual Appraisal	6/23/2009	6/9/2015	None		No					
DEV - Default Appraisal	Annual Appraisal	3/15/2010	11/11/2015	None							
Reassign/Term Check	Annual Appraisal	6/25/2009	2/15/2013	None							
KC - Creative EPM Workflow	Annual Appraisal	1/4/2011	7/27/2016	None	Company/Division Kat's Creative Detective Agency	Yes					
HD - Complete Workflow	Annual Appraisal	1/24/2011	2/15/2013	None	Company/Division Hiba's Singers Production Company	No					
ZL - EPM Workflow 01	Annual Appraisal	10/14/2011	2/9/2016	None	Company/Division Zenmar's General Services	No					

D

Scroll to the workflow you want to edit and click the Edit icon.

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

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Workflow

Reine's Workflow

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

E
Click the
Categories step.

WORKFLOW NAME *

Reine's Workflow

WORKFLOW TYPE

Annual Appraisal

DESCRIPTION

B *I* U | | | | | |

Empty text area for description.



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

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

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Workflow

Reine's Workflow

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

Available Items	
RF - Goals (Goal)	+
RN-Scale Goal (Slider scale with NA) (Goal)	+
Sales (Goal)	+
SK - Time Goals (Goal)	+
SK - Work Goals (Goal)	+
SLIDER GOAL (NA) (Goal)	+
SLIDER GOAL (W/O NA) (Goal)	+
CL - Leadership and Management Competencies (Competency)	+

F In the Available Items list, locate the category for the goal you created in the Goals Library, and click the plus icon to add this to the workflow.

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

[Equalize Weights](#) [Normalize Weights to 100](#)

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

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Workflow

Reine's Workflow

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

G

Click the Content step.

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

Selected Items			
Core Competencies (Competency)	Weight	<input type="text" value="33.34"/>	% <input type="checkbox"/>
Job Competencies (Competency)	Weight	<input type="text" value="33.33"/>	% <input type="checkbox"/>
Sales (Goal)	Weight	<input type="text" value="33.33"/>	% <input type="checkbox"/>
Total Weight		100.00	

Equalize Weights

Normalize Weights to 100

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

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

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Workflow

Reine's Workflow

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

Writing ⓘ +

Sales

H Scroll to the section for the new category.

Lock Category

Available Items

Secure 2 Verified Leads for your Pipeline ⓘ +

Selected Items

Total	0.00
-------	------

I In the Available Items list, locate the goal added in the Goals library and click the plus icon to select it.

← Previous | Save Changes | Next → | Cancel

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

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

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

Sales

Lock Category

Available Items

Selected Items

Secure 2 Verified Leads for your Pipeline ⓘ

Weight 100.00

%

×

Total Weight

100.00

← Previous

Save Changes

J

Click to Save Changes.

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

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

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

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

Workflows

Success: The workflow was successfully saved.

Create New Workflow

Reine's Workflow	Annual Appraisal	6/23/2009	6/9/2015	None		No						
DEV - Default Appraisal	Annual Appraisal	3/15/2010										
Reassign/Term Check	Annual Appraisal	6/25/2009										
KC - Creative EPM Workflow	Annual Appraisal	1/4/2011	7/27/2016	None	Company/Division Kat's Creative Detective Agency	Yes						
HD - Complete Workflow	Annual Appraisal	1/24/2011	2/15/2013	None	Company/Division Hiba's Singers Production Company	No						
ZL - EPM Workflow 01	Annual Appraisal	10/14/2011	2/9/2016	None	Company/Division Zenmar's General Services	No						

The goal has been added to the workflow. Now when a Manager creates an appraisal based on that workflow, the goal is added to the appraisal.

Next we'll create an appraisal based on Reine's Workflow to demonstrate.

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MY EMPLOYEES

A

Click MY EMPLOYEES.

My Employees

B

Click My Employees.

My Matrix Employees

Main Dashboard

Get More Widgets

Tasks

9 Box

Project Teams

Certifications

• [New Tuition Assistance Requests \(10\)](#)

• [Score this Appraisal - Appraisal \(Mars WF Easy LALA\) Mars Admin](#)

Show All

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

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

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My Employees

Employees

Search...

My Employees / My Employees

My Employees

Performance

Development

Learning

« < 1 > »

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



Reine Admin

PB:
Administration and General
RT Hotel 5*

APPRAISALS

CURRENT P

★ Mars wf full 2
Approvals

Performance *Incomplete*

ACTIONS

Continuous Feedback

Goals

+ Create New Appraisal

+ Create New 360 Assessment

Drill Down

View TTP

C Click the down arrow to expand the Actions menu.

D Click **Create New Appraisal**.

Expand

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

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

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English

Employees Search...

Launch Appraisals

Step 1: Select Employees

Step 2: Select Performance Workflow

Step 3: Review

<input checked="" type="checkbox"/>	Reine Admin	Admin HRsmart	Administration and General	RT Hotel 5*	Mars wf full 2 Approvals
<input type="checkbox"/>	Epepito Administrator	Admin HRsmart			Mars wf full really EM - EPM Workflow JMC Workflow I
<input type="checkbox"/>	Sammie Spam				Mars wf full 2 Approvals

← Previous **Next** → Cancel

E Click Next.

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

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

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

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Employees Search...

My Employees / My Employees

Launch Appraisals

Step 1 Select Employees

Step 2 Select Performance Workflow

Step 3 Review

APPRAISAL SOURCE

- Most Closely Associated Wo
- Choose Workflow

-- Select --

- PBA - EPM Workflow
- RC - EPM Workflow
- RC - EPM Workflow 2
- Reassign/Term Check
- Reine's Workflow**
- RF - EPM Work Flow
- RN-RA Multiple Appraiser
- RN-RA Self Appraising
- RN-RA WORKFLOW (Approval A)
- RN-RA WORKFLOW (Complete/INC Goal RBNA)
- RN-RA WORKFLOW (Goal only)

Next Cancel

F Click **Choose Workflow**.

G Click the down arrow to expand the selections.

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

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

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Launch Appraisals

Step 1
Select Employees

Step 2
Select Performance Workflow

Step 3
Review

APPRaisal SOURCE

Most Closely Associated Workflow

Choose Workflow

Reine's Workflow

Copy Appraisal

-- Select --

Mark Appraisal as Primary

Launch Appraisals from Workflow

APPRaisal NAME *

Reine's Workflow

EMPLOYEE NAME	EMPLOYEE ID	MANAGER	ORGANIZATIONAL UNIT	JOB TITLE	LOCATION	APPRAISALS
Reine Admin		Admin HRsmart	Administration and General		RT Hotel 5*	Mars wf full 2 Approvals Reine's Workflow

< Previous

Next >

Click Next.

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

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Launch Appraisals

Step 1
Select Employees

Step 2
Select Performance Workflow

Step 3
Review

Workflow [Edit](#)

SOURCE WORKFLOW
Reine's Workflow

APPRAISAL NAME
Reine's Workflow

Employees [Edit](#)

EMPLOYEE NAME	EMPLOYEE ID	MANAGER	ORGANIZATIONAL UNIT	JOB TITLE	LOCATION	APPRAISALS
Reine Admin		Admin HRsmart	Administration and General		RT Hotel 5*	Mars wf full 2 Approvals

[Previous](#) [Finish](#) [Cancel](#)

J

Click Finish.

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

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My Employees

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Search...

MY EMPLOYEES

A

Click MY EMPLOYEES.

My Employees

B

Click My Employees.

My Matrix Employees

My Employees

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Reine Admin

PB:
Administration and General
RT Hotel 5*

APPRAISALS

CURRENT PHASE

SCORE

PHASE END DATE

★ Mars wf full 2 Approvals

Performance

Incomplete

★ Reine's Workflow

Planning

Incomplete

C

Click the appraisal we launched in step 3, **Reine's Workflow** appraisal.

Expand

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

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

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Reine's Workflow

for Reine Admin

Print Appraisal

This appraisal is ready to move to the next phase.

Move to the Next Phase

APPRAISAL INFORMATION

CORE COMPETENCIES (33.34%)

JOB COMPETENCIES (33.33%)

SALES (33.33%)

CONTINUOUS FEEDBACK

SUMMARY

SUPPORT INFORMATION (GLOBAL ADMIN ONLY)

Step 1

Planning

Step 2

Performance

Step 3

Assessment

D

Click the category where we added the goal in Step 2, the **Sales** goal category.

Signature Log

Phase Signature Requirements

1. ~@epm_workflow_phase_06540b2b5a8712538a338983b2cb8218@~ (No signatures are required)
2. ~@epm_workflow_phase_188e60b3583102d056f986c879fef540@~ (No signatures are required)
3. ~@epm_workflow_phase_500b438667e2bbf2545516ac4055b60d@~ (No signatures are required)
4. ~@epm_workflow_phase_62270be815742523109679d3b2d62023@~ (No signatures are required)

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Sales (100.00%)

Collapse All Notes

Add Goal

Manage Weights

Secure 2 Verified Leads for your Pipeline (50.00%)

The goal we added in Step 2 displays under the Sales category.

Add at least 2 qualified leads to your pipeline by the end of Q4.

GOAL SCORE TYPE Percentage Complete

PRIVATE No

START DATE

TARGET DATE

COMPLETION DATE

GOAL STATUS N/A

EMPLOYEE % COMPLETE: 0%

MANAGER % COMPLETE: 0%

RELATED GOAL [Browse](#)

General Appraisal Notes

Add Journal Entry

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Sales (100.00%)

Collapse All Notes

Add Goal

Manage Weights

Secure 2 Verified Leads for your Pipeline (50.00%)



Add at least 2 qualified leads to your pipeline by the end of Q4.

GOAL SCORE TYPE

Percentage Complete

PRIVATE

START DATE

TARGET DATE

COMPLETION DATE

GOAL STATUS

N/A

EMPLOYEE % COMPLETE:

0%

MANAGER % COMPLETE:

0%

RELATED GOAL

Browse

This concludes the Add Goals to an Appraisal via the Performance Workflow click-thru.

General Appraisal Notes

Add Journal Entry

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

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