

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

☰

Deltak Talent Management

Application Development Testing CompanyEnglish📅📄❓⚙️👤

Dashboard

MY EMPLOYEES ▾

RECRUITING ▾

PERFORMANCE ▾

LEARNING ▾

SUCCESSION ▾

CAREER CENTER ▾

REPORTS ▾

Employees ▾

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.

Begin

Kathryn Admin12 Apr 2018None

Re ne Admin18 Apr 2018None

Eped to AdministratorNoneNone

Get More Widgets

✕

Best viewed in IE or Adobe PDF Reader.

View the Goal Added to the Appraisal

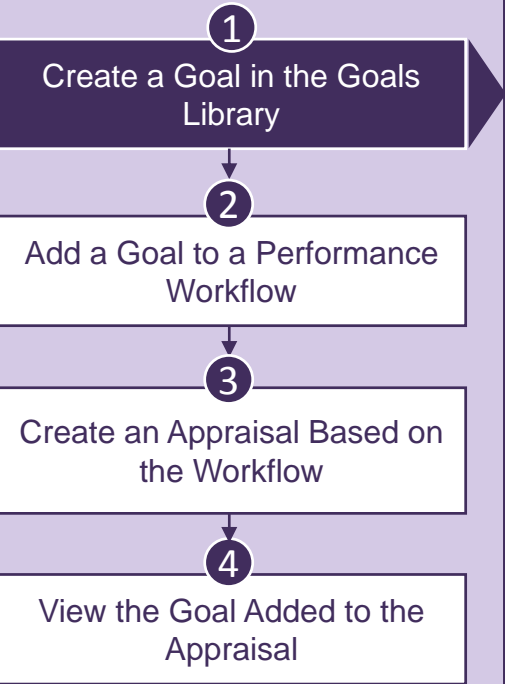
[Library Resources](#)

Click Goals.

Click the Administration icon.

Integrations Setup

Add Goals to an Appraisal
Via the Performance
Workflow



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.

























Goals

Add a New Goal

Add a New Goal Category

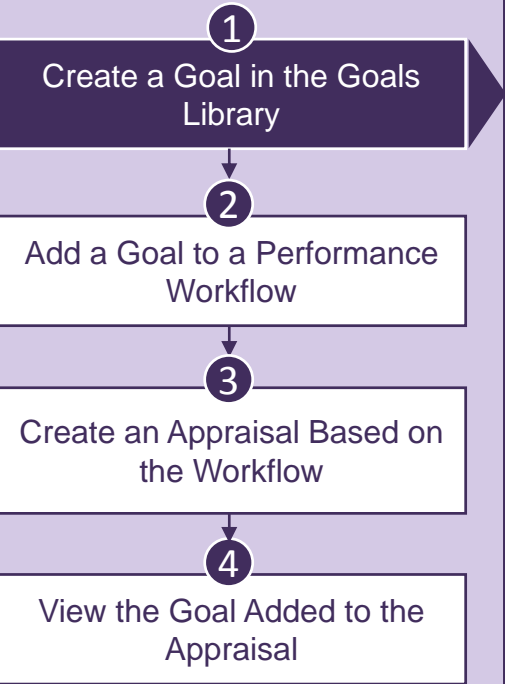
« < 1 2 > »

g 1 - 25 of 30102550100per page

CATEGORY NAME	NUMBER OF GOALS	ACTIONS
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	  

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.

Add Goals to an Appraisal Via the Performance Workflow



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

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

My Employees / My Employees

Goals

Add Goals

View All Goals Categories

Back to Goals

GOAL NAME *

GOAL CATEGORY NAME *

GOAL SCORE TYPE *

GOAL DESCRIPTION *

E

F

G

H

Enter a Goal Name.

Select a Goal Category to associate with the goal.

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

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:

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:

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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?

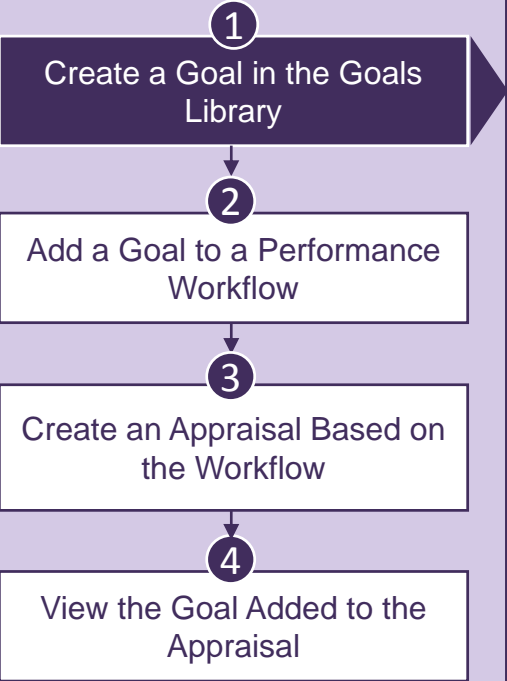
Submit

Cancel

1

Click **Submit**.

Add Goals to an Appraisal
Via the Performance
Workflow



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.

Manage Goals

Sales

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

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	✎ 🔒 ✕

Add a Goal to a Performance Workflow

View the Goal Added to the Appraisal

Q

[Library Resources](#)

Scroll to the Performance section.

Click Workflows.

Click the Administration icon.

Integrations Setup

Add Goals to an Appraisal
Via the Performance
Workflow

1

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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.

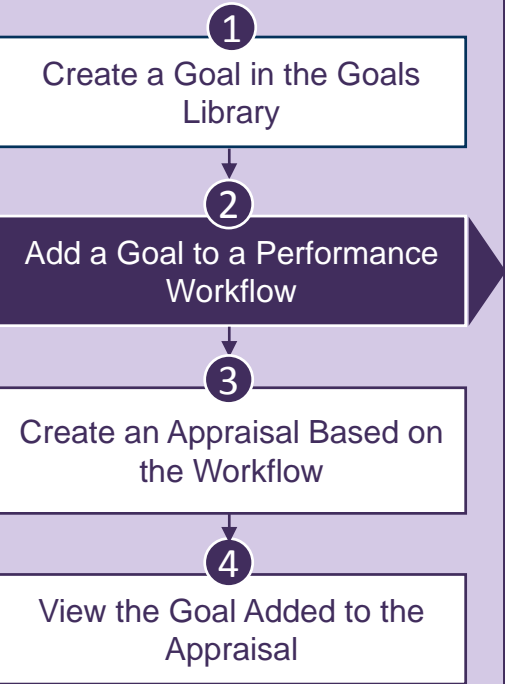
Create New Workflow

D

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

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					

Add Goals to an Appraisal Via the Performance Workflow



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

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

Workflow

Reine's Workflow

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

E
Click the Categories step.

WORKFLOW NAME *

Reine's Workflow

WORKFLOW TYPE

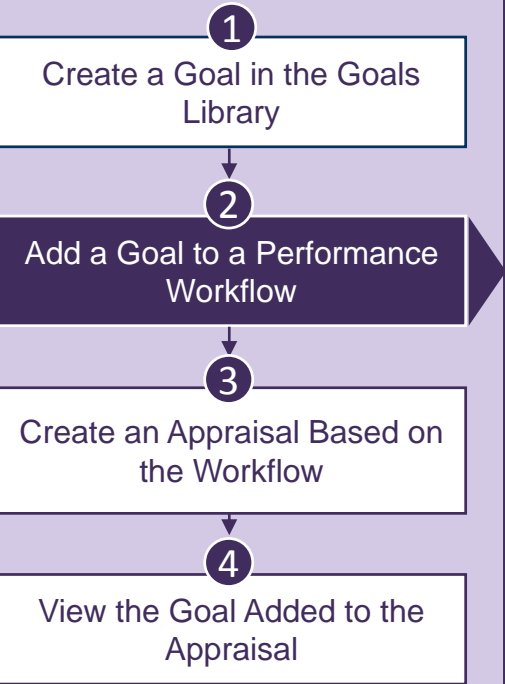
Annual Appraisal ▼

DESCRIPTION

B *I* U



Add Goals to an Appraisal
Via the Performance
Workflow



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

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

Workflow
Reine's Workflow

Step 1

Identification

Step 2

Categories

Step 3

Content

Step 4

Scale

Step 5

Phases

Step 6

Configuration

Step 7

Appraisers

Step 8

Approvals

Step 9

Approval Order

Step 10

Scheduling

Step 1

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)	+
SL - Leadership and Management Competencies (Competency)	+

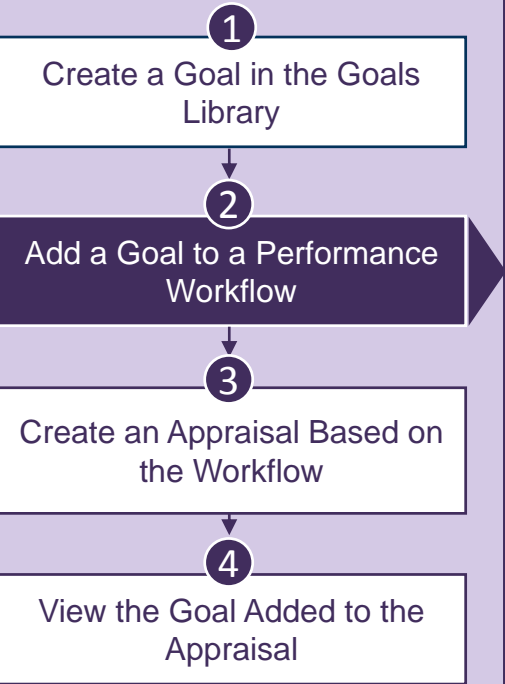
F In the Available Items list, locate the category for the goal you created in the Goals Library, and click the plus icon to add this to the workflow.

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

Equalize Weights

Normalize Weights to 100

Add Goals to an Appraisal
Via the Performance
Workflow



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

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

Workflow

Reine's Workflow

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

G Click the Content step.

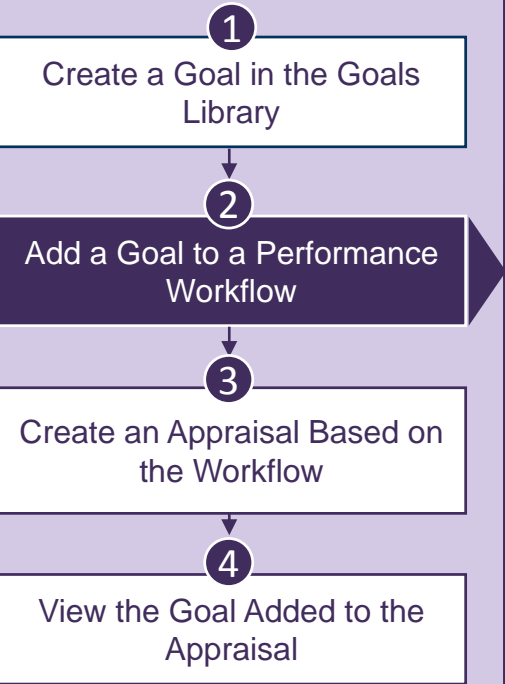
Available Items	
Achievements (Global Achievement)	+
AB - Healthcare Competencies and Others (Competency)	+
Active & Passive Communication (DEV) (Competency)	+
ALG Comptencies (Competency)	+
AS - Magical (Competency)	+
Athletic Category (DEV) (Competency)	+
Basic Management (DEV) (Competency)	+
CL -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

Selected Items			
Core Competencies (Competency)	Weight	33.34	% ✕
Job Competencies (Competency)	Weight	33.33	% ✕
Sales (Goal)	Weight	33.33	% ✕
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.

Add Goals to an Appraisal
Via the Performance
Workflow



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 1 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
-------	------

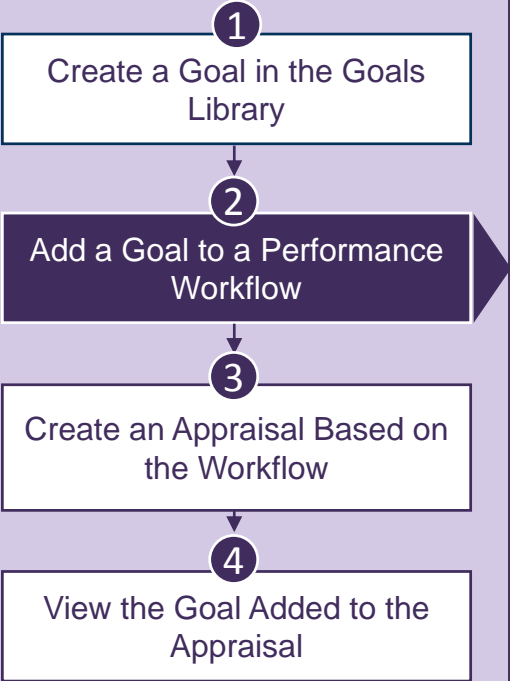
I In the Available Items list, locate the goal added in the Goals library and click the plus icon to select it.

◀ 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.

Add Goals to an Appraisal Via the Performance Workflow



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

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

Systems Evaluation ⓘ

Technology Design ⓘ

Telecommunications ⓘ

Working with numbers and solving equations ⓘ

Writing ⓘ

Sales

☐ Lock Category

Available Items

Selected Items

Secure 2 Verified Leads for your Pipeline ⓘ

Weight100.00%

×

Total Weight

100.00

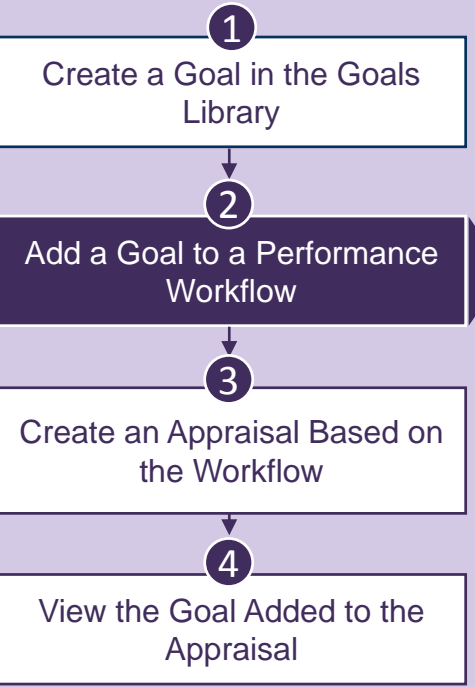
Previous

Save Changes

Next

JClick to Save Changes.

Add Goals to an Appraisal Via the Performance Workflow



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

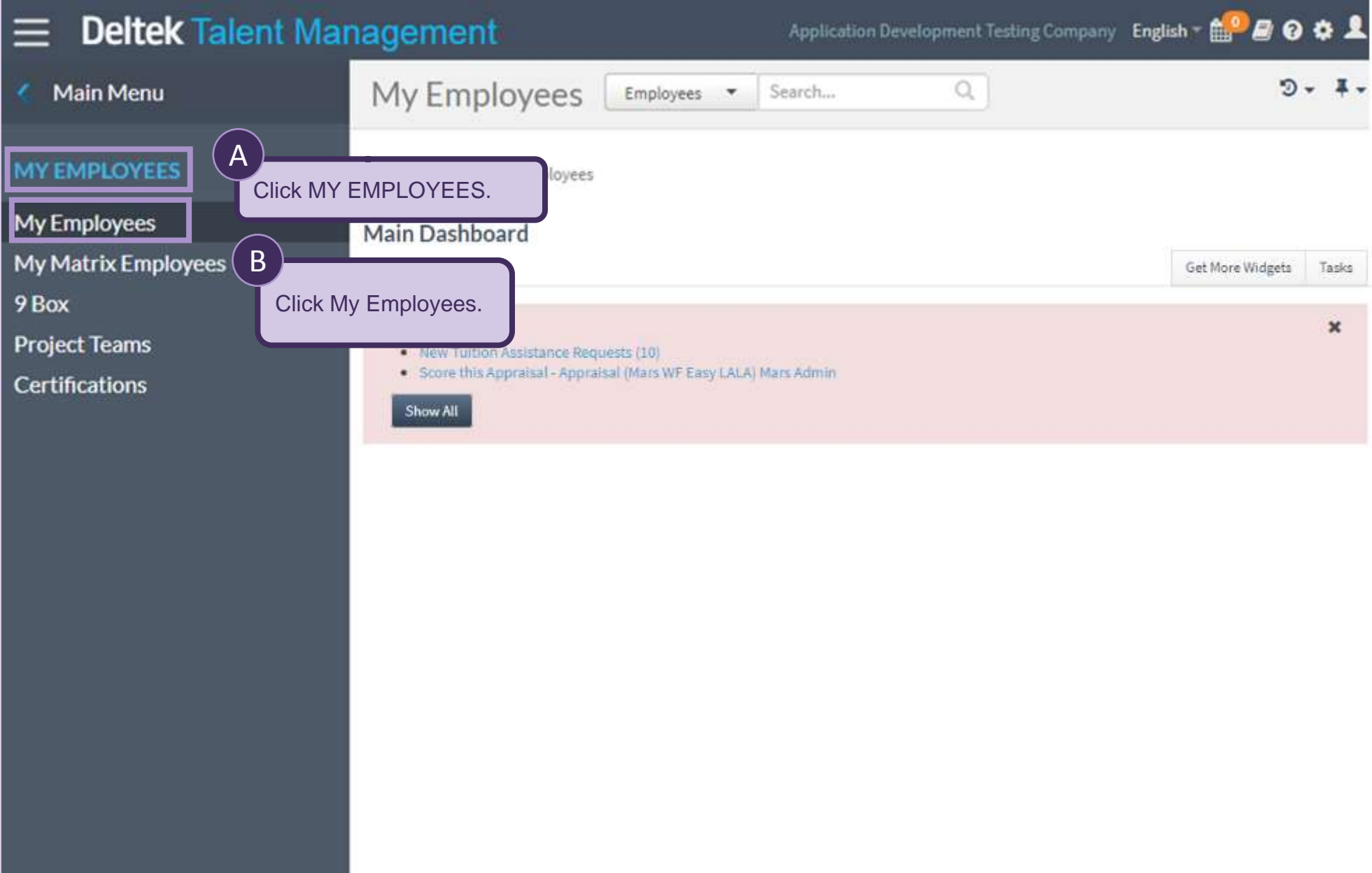
Reine's Workflow	Annual Appraisal	6/23/2009	6/9/2015	None		No						
DEV - Default Appraisal	Annual Appraisal	3/15/2010										
Reassign/Term Check	Annual Appraisal	6/25/2009										
KC - Creative EPM Workflow	Annual Appraisal	1/4/2011	7/27/2016	None	Company/Division Kat's Creative Detective Agency	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.

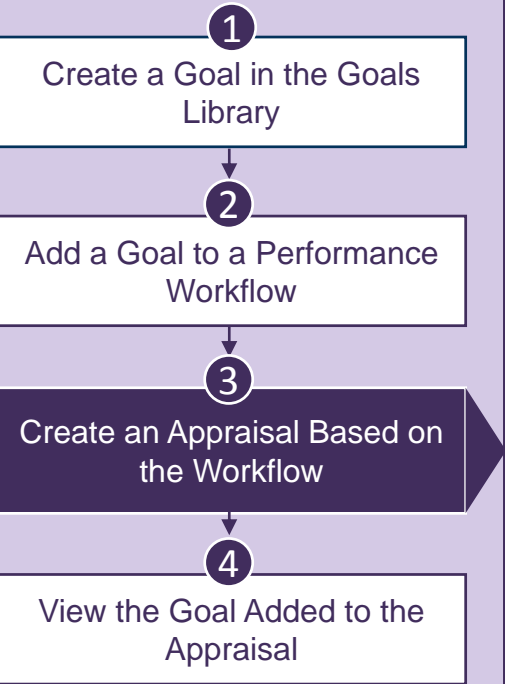
Next we'll create an appraisal based on Reine's Workflow to demonstrate.

```
graph TD; 1((1)) --> 2((2)); 2 --> 3((3)); 3 --> 4((4));
```

- 1
Create a Goal in the Goals Library
- 2
Add a Goal to a Performance Workflow
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- 4
View the Goal Added to the Appraisal



Add Goals to an Appraisal
Via the Performance
Workflow



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.

Deltektalent Management

English

Employees

Search...

Launch Appraisals

Step 1

Select Employees

Step 2

Select Performance Workflow

Step 3

Review

☒

Reine Admin

Admin
HRsmart

Administration and
General

RT Hotel 5*

Mars wf full 2
Approvals

☐

Epepito
Administrator

Admin
HRsmart

Mars wf full really
EM - EPM Workflow
JMC Workflow I

☐

Sammie Spam

Mars wf full 2
Approvals

Previous

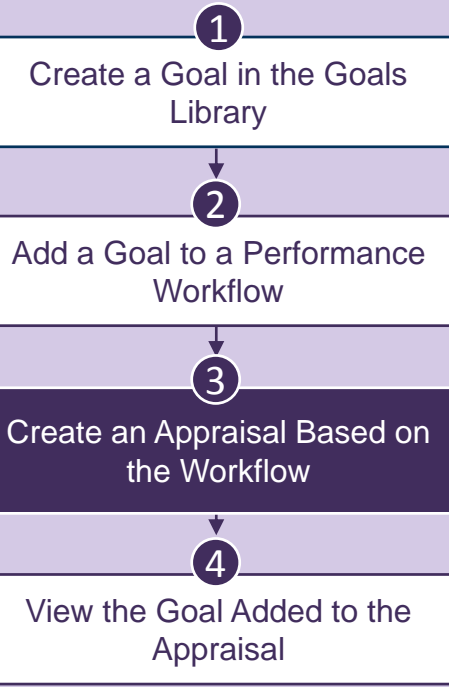
Next

Cancel

E

Click Next.

Add Goals to an Appraisal Via the Performance Workflow



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

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

Employees

Search...

My Employees / My Employees

Launch Appraisals

Step 1
Select Employees

Step 2
Select Performance Workflow

Step 3
Review

APPRAISAL SOURCE

☐ Most Closely Associated 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)

Click **Choose Workflow**.

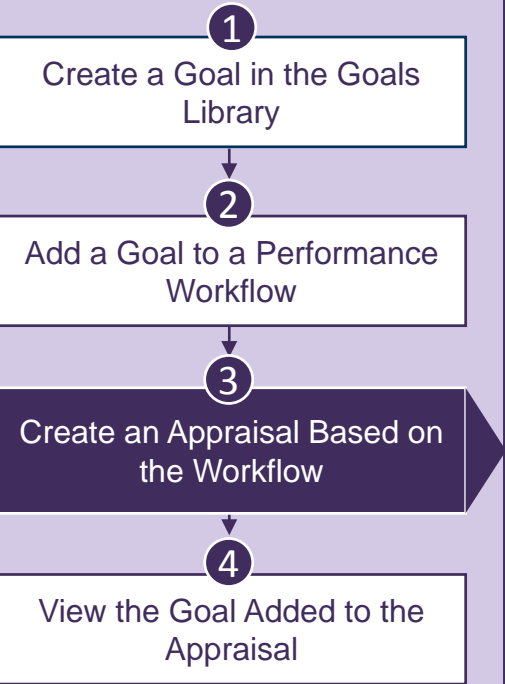
Click the down arrow to expand the selections.

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

Next

Cancel

Add Goals to an Appraisal
Via the Performance
Workflow



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

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

Launch Appraisals

Step 1
Select Employees

Step 2
Select Performance Workflow

Step 3
Review

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

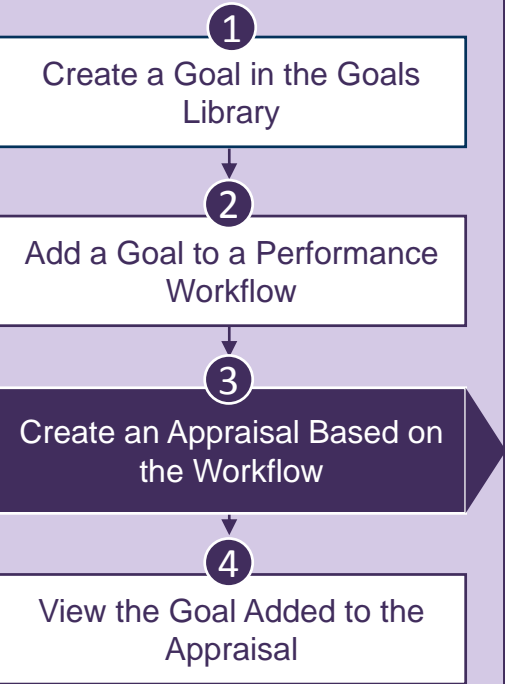
> Next

Cancel



Click **Next**.

Add Goals to an Appraisal
Via the Performance
Workflow



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

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

Launch Appraisals

Step 1
Select Employees

Step 2
Select Performance Workflow

Step 3
Review

Workflow

SOURCE WORKFLOW
Reine's Workflow

APPRAISAL NAME
Reine's Workflow

Edit

Employees

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

Edit

Previous

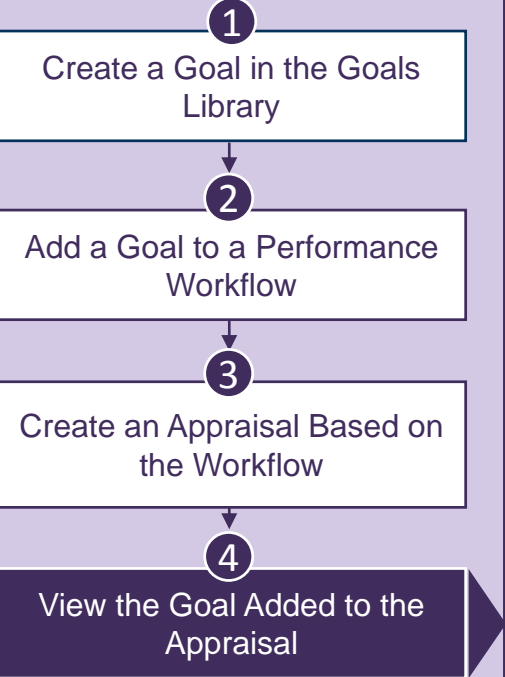
Finish

Cancel

J

Click **Finish**.

Add Goals to an Appraisal Via the Performance Workflow



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Deltek Talent Management

Application Development Testing Company English

Main Menu

MY EMPLOYEES

My Employees

My Matrix Employees

9 Box

Project Teams

Certifications

My Employees

Employees

Search...

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 PHASE	SCORE	PHASE END DATE
★ Mars wf full 2 Approvals	Performance	Incomplete	
★ Reine's Workflow	Planning	Incomplete	

Expand

A

Click MY EMPLOYEES.

B

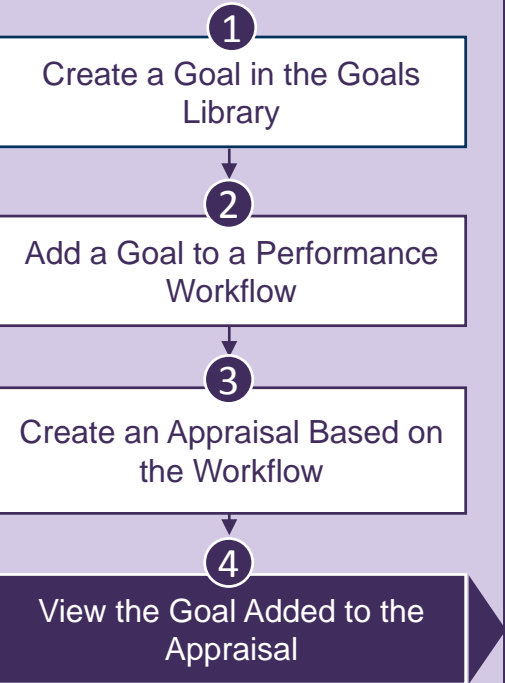
Click My Employees.

C

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

Now let's open the appraisal we launched in Step 3 and view the goal within the appraisal.

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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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%)

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	<div>Q Browse</div>

General Appraisal Notes

Add Journal Entry

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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	<div>Q Browse</div>

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

General Appraisal Notes

Add Journal Entry