

Add Goals to an Appraisal Via the Performance Workflow Quick Steps

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 ▾

🔄 👤

Main Dashboard

The high-level steps an Administrator takes to add a goal to an appraisal by creating a goal in the Goals Library and adding it to a Performance Workflow are shown in the menu on the left.

Navigation

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

Get More Widgets

✕

Kathryn Admin

12 Apr 2018

None

Begin

Re ne Admin

18 Apr 2018

None

+

Epe to

None

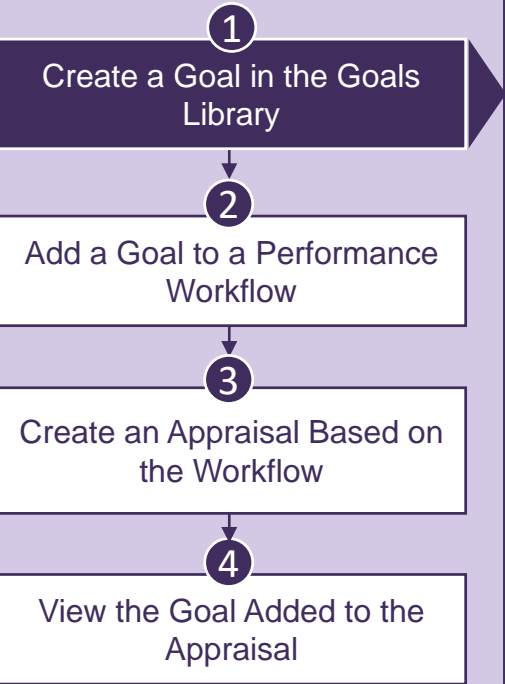
None

+

Adminstrator

Best viewed in IE or Adobe PDF Reader.

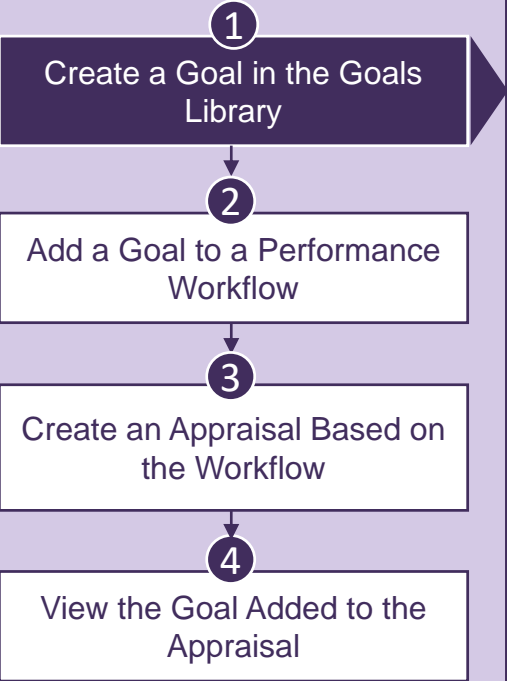
Add Goals to an Appraisal Via the Performance Workflow Quick Steps



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

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

Add Goals to an Appraisal
Via the Performance
Workflow Quick Steps



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

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Goals

Add a New Goal

Add a New Goal Category

« < 1 2 > »

g 1 - 25 of 30102550100 per 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	  

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.

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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 *

-- Select --

F

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

GOAL SCORE
TYPE *

-- Select --

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**      

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
limits.
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:

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step in each phase.

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through each step and sub-step.



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**.

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through each step and sub-step.

Manage Goals

Sales

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

View All Goals Categories

« < 1 > »

Displaying 1 - 1 of 1 10 25 50 100 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	✎ 🔒 ✕

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

- 1
Create a Goal in the Goals Library
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View the Goal Added to the Appraisal

Q

[Library Resources](#)

B Scroll to the Performance section.

Click **Workflows**.

Integrations Setup

Add Goals to an Appraisal
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Workflow Quick Steps

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Appraisal































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

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

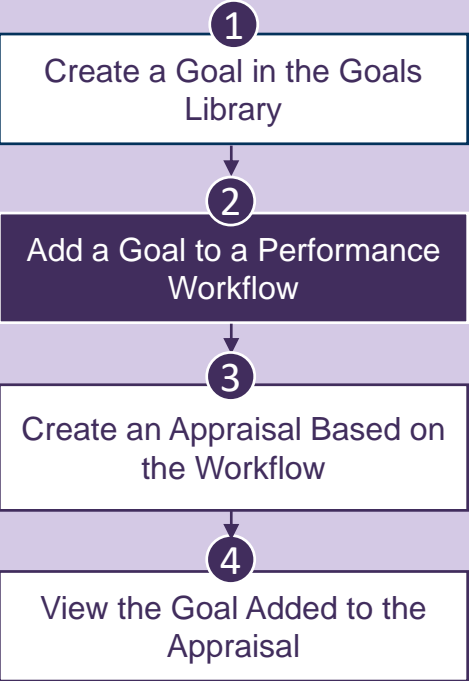
Create New Workflow

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.

Add Goals to an Appraisal Via the Performance Workflow Quick Steps



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

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

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

WORKFLOW NAME *

Reine's Workflow

WORKFLOW TYPE

Annual Appraisal

DESCRIPTION

B I U

☰

☷

☰☷

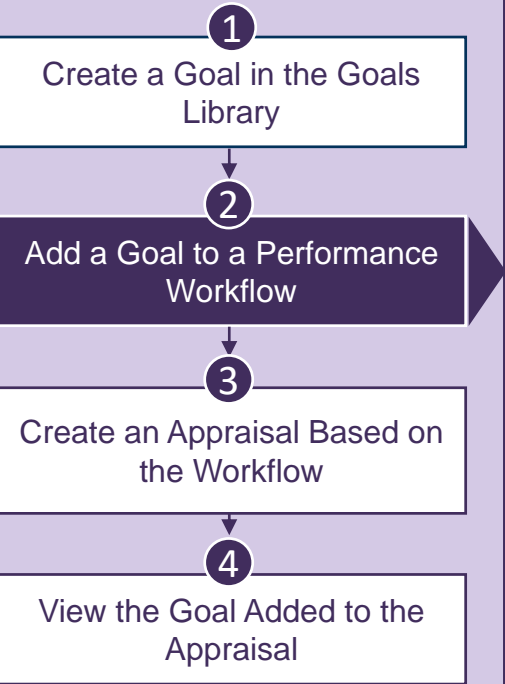
☷☰

🔗 🔗✕



E
Click the Categories step.

Add Goals to an Appraisal
Via the Performance
Workflow Quick Steps



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

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

Workflow
Reine's Workflow

Step 1

Step 2

Step 3

Step 4

Step 5

Step 6

Step 7

Step 8

Step 9

Step 10

Step 1

Identification

Categories

Content

Scale

Phases

Configuration

Appraisers

Approvals

Approval Order

Scheduling

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)	+

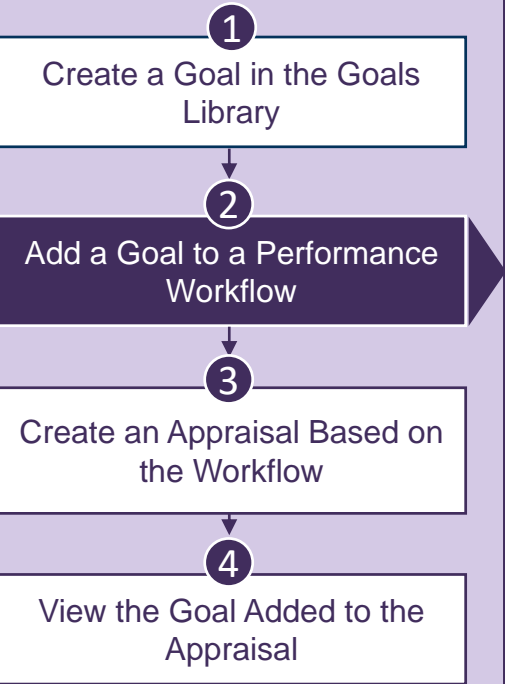
F In the Available Items list, locate the category for the goal you created in the Goals Library, and click the plus icon to add this to the workflow.

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
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Workflow Quick Steps



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

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

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)	+

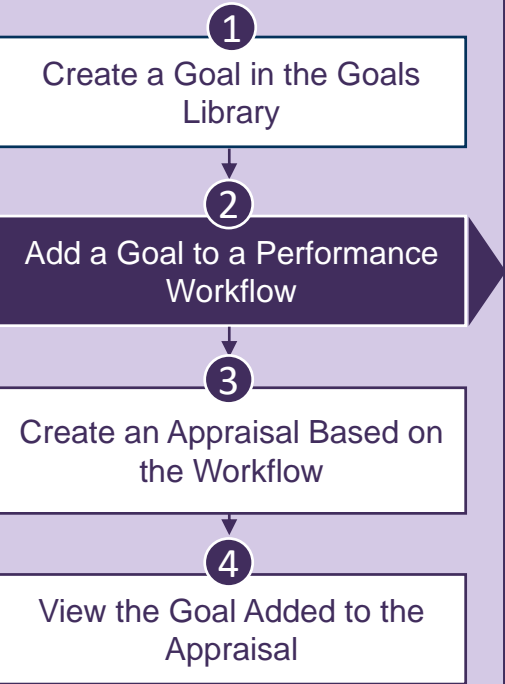
Selected Items			
Core Competencies (Competency)	Weight	33.34	% ✕
Job Competencies (Competency)	Weight	33.33	% ✕
Sales (Goal)	Weight	33.33	% ✕
Total Weight		100.00	

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 Quick Steps



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

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

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

Add Goals to an Appraisal
Via the Performance
Workflow Quick Steps

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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 ⓘ	Weight	100.00	%	✕
---	--------	--------	---	---

Total Weight	100.00
--------------	--------

◀ Previous

Save Changes

J

Click to **Save Changes**.

Add Goals to an Appraisal Via the Performance Workflow Quick Steps

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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; A[1. Create a Goal in the Goals Library] --> B[2. Add a Goal to a Performance Workflow]; B --> C[3. Create an Appraisal Based on the Workflow]; C --> D[4. View the Goal Added to the Appraisal];
```

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

The screenshot shows the Deltak Talent Management application interface. The top navigation bar includes the Deltak logo, the text "Application Development Testing Company", and a language dropdown set to "English". The left sidebar contains a "Main Menu" with options: "MY EMPLOYEES" (highlighted with a purple box and labeled 'A'), "My Employees" (highlighted with a purple box and labeled 'B'), "My Matrix Employees", "9 Box", "Project Teams", and "Certifications". The main content area is titled "My Employees" and features a search bar and a dropdown menu set to "Employees". Below this, there is a "Main Dashboard" section with a "Get More Widgets" button and a "Tasks" button. A red notification banner at the bottom of the dashboard contains the following items:

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

A "Show All" button is located at the bottom of the notification banner. Two callout boxes are present: one labeled 'A' pointing to the "MY EMPLOYEES" menu item with the text "Click MY EMPLOYEES.", and another labeled 'B' pointing to the "My Employees" menu item with the text "Click My Employees."

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Main Menu

MY EMPLOYEES

My Employees

My Matrix Employees

9 Box

Project Teams

Certifications

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
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Add Goals to an Appraisal Via the Performance Workflow Quick Steps

1

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2






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the Workflow

4

View the Goal Added to the
Appraisal

Deltak Talent Management 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

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.

E

Click **Next**.

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

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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)

F

Click **Choose Workflow**.

G

Click the down arrow to expand the selections.

H

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

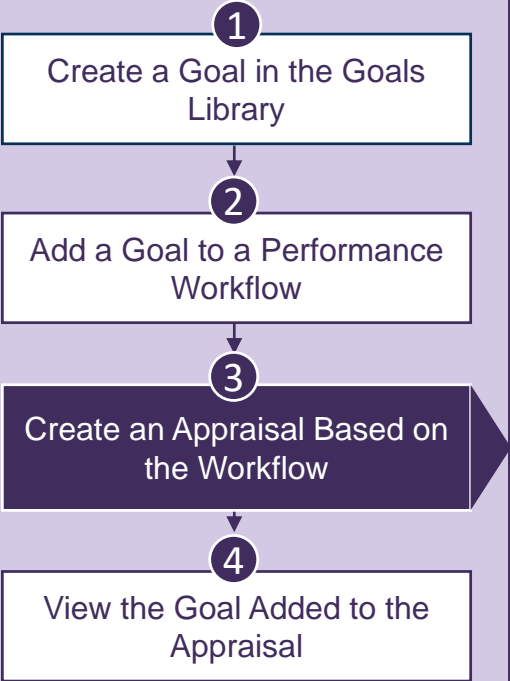
Next

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 Quick Steps



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

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

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

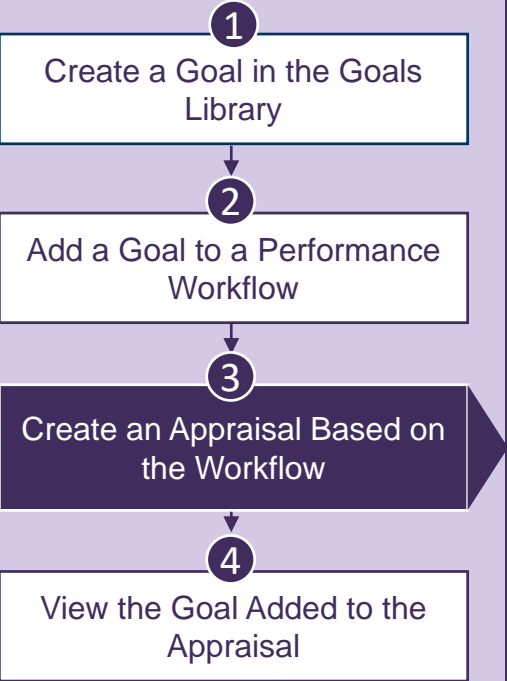
< Previous

Next >

Cancel

Click **Next**.

Add Goals to an Appraisal
Via the Performance
Workflow Quick Steps



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

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

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**.

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< Main Menu

My Employees

Employees

Search...

MY EMPLOYEES

My Employees

My Matrix Employees

9 Box

Project Teams

Certifications

A

Click MY EMPLOYEES.

B

Click My Employees.

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

<< < 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

C

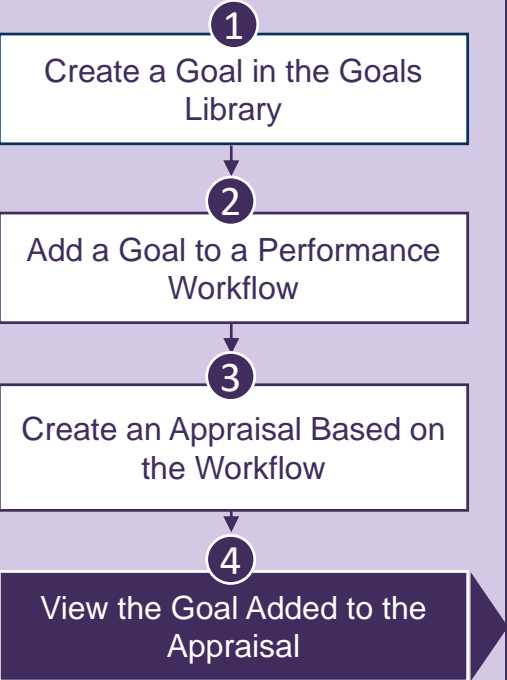
Click the appraisal we launched in step 3, **Reine's Workflow** appraisal.

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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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.

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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Create an Appraisal Based on the Workflow

4

View the Goal Added to the Appraisal

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.

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

Add Goals to an Appraisal Via the Performance Workflow Quick Steps

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

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.

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 quick steps.

General Appraisal Notes

Add Journal Entry