Add a Goal Within an Appraisal

1 Open an Appraisal for a Direct Report

2 Click the Goal Category Tab

3 Click the Add Goal Button

4 Add Details For the New Goal

5 Manage Weights, If Necessary

☰ **Deltek** Talent Management

Application Development Testing Company English ▾

Dashboard

Employees ▾

MY EMPLOYEES ▾

RECRUITING ▾

PERFORMANCE ▾

LEARNING ▾

SUCCESSION ▾

CAREER CENTER ▾

REPORTS ▾

Main Dashboard

Get More Widgets

In this click-thru, you will learn how a Manager adds a goal within an Appraisal.

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

Best viewed in IE or Adobe PDF Reader.

Add a Goal Within an Appraisal

1

Open an Appraisal for a Direct Report

↓

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Click the Goal Category Tab

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Click the Add Goal Button

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Add Details For the New Goal

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Manage Weights, If Necessary

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

☰ **Deltek** Talent Management

Application Development Testing Company   English ▾   🗓 0   📕 ❓ ⚙ 👤

‹ Main Menu

My Employees   [Employees ▾]   [Search...   🔍]   🕘▾ 📌▾

MY EMPLOYEES

A Click **MY EMPLOYEES**.

My Employees

My Matrix Employees

B Click **My Employees**.

My Employees

9 Box

Project Teams

Certifications

[Development | Learning]

« ‹ **1** › »

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

	APPRAISALS	CURRENT PHASE	SCORE	PHASE END DATE	⚙▾
	⭐ Mars wf full 2 Approvals	Performance	*Incomplete*		
Reine Admin	⭐ Reine's Workflow	Planning	*Incomplete*		
PB: Administration and General RT Hotel 5*	(360)				
	More...				

C Locate the direct report, then click the link for the appraisal to which you want to add a goal.

Expand ▾

Add a Goal Within an Appraisal

①
Open an Appraisal for a Direct Report

②
Click the Goal Category Tab

③
Click the Add Goal Button

④
Add Details For the New Goal

⑤
Manage Weights, If Necessary

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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)

A Click the goal category where you want to add a goal.

Step 1	Step 2	Step 3	Step 4
Planning	Performance	Assessment	Review

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)

① **Open an Appraisal for a Direct Report**

↓

② **Click the Goal Category Tab**

↓

③ **Click the Add Goal Button** ▶

↓

④ **Add Details For the New Goal**

↓

⑤ **Manage Weights, If Necessary**

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

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)

Sales (100.00%)

This tab displays details about goals previously added, either by an Administrator via the Performance Workflow, or by a Manager, from within the appraisal.

⊟ Collapse All Notes   ⚑ Add Goal   ✏ Manage Weights

Ⓐ

Click **Add Goal**.

Secure 2 Verified Leads for your Pipeline (100.00%)   ⚙▾

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

Add a Goal Within an Appraisal

①

Open an Appraisal for a Direct Report

↓

②

Click the Goal Category Tab

↓

③

Click the Add Goal Button

↓

④

Add Details For the New Goal

↓

⑤

Manage Weights, If Necessary

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

Add Goal

IMPORT

Browse Library
Browse Manager Goals
Browse Manager's Direct Reports
Browse Employee Past Appraisals

A

Click **Browse Manager Goals**.

GOAL NAME *

[   ]

GOAL SCORE TYPE *

-- Select --

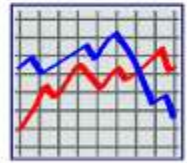DESCRIPTION *

B *I* U | 1≡ ≔ | ⇥ ⇤ | 🔗 ⌫

Managers can create goals from scratch, or depending on configuration and access rights, Managers may have options for creating goals from existing goals. Options can include copying goals from the Goals Library, from your Manager, from your Manager's direct reports, or from goals in past appraisals.

SMART goals need to be **S**pecific. To make goals specific, they must indicate exactly what is going to be accomplished, why it is important, and who is to be involved. A specific goal will usually answer the following questions:

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

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

- What milestones will be set to keep my progress towards the goal on track?

Add a Goal Within an Appraisal

1

Open an Appraisal for a Direct Report

2

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Click the Add Goal Button

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Add Details For the New Goal

5

Manage Weights, If Necessary

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

Add Goal

IMPORT

Browse Library
Browse Manager Goals
Browse Manager's Direct Reports
Browse Employee Past Appraisals

GOAL NAME *

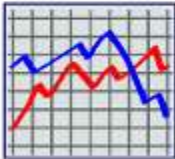GOAL SCORE TYPE *

-- Select --

DESCRIPTION *

B **B** **I** **U**

Browse Manager Goals

Browse Manager Goals

☑ **Reine Admin** · Complete Corporate Leadership Training
Complete 6-week course before end of year.

B

Click a goal to copy all the goal's details to the Add Goal screen.

Close Window

goals need to be **S**pecific. To make goals specific,

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ved?

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

- What milestones will be set to keep my progress towards the goal on track?

Add a Goal Within an Appraisal

① Open an Appraisal for a Direct Report

↓

② Click the Goal Category Tab

↓

③ Click the Add Goal Button

↓

④ Add Details For the New Goal

↓

⑤ Manage Weights, If Necessary

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.

Complete Corporate Leadership Training

GOAL SCORE TYPE *

Scale ▼

DESCRIPTION *

B I U   ☰ ☷   ☰ ☷   ☍ ☍

Complete 6-week course before end of year.

⊘

All details except dates are copied to the new goal. Add dates and make additional changes, as desired.

START DATE

📅

C Enter a **Start Date**.

TARGET DATE

📅

D Enter a **Target Date**.

Goals can be associated employees see how their contributions affect larger, strategic objectives. Browse and choose another goal that this goal should be associated with. The new goal will be a part of any group the
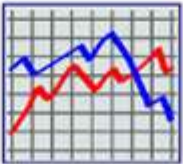

- What: What do I want/need to accomplish? Include requirements and constraints.
- Why: Why is this goal beneficial and purposeful?
- Who: Who is involved?

A **Measurable** goal stresses the need for concrete criteria for measuring progress toward the attainment of the goal. It also discusses what this looks like once the goal is completed. A measurable goal will answer questions such as:

- What milestones will be set to keep my progress towards the goal on track?
- How will I know when it is accomplished?
- What will success look like (via measurement) once this goal is accomplished?

Attainable goals are difficult, yet not out of reach nor below standard performance. They should require the employee to stretch and develop new skills and competencies in order to achieve the goal. An attainable goal will usually answer the following questions:

Add a Goal Within an Appraisal

START DATE

📅 4/25/2019

TARGET DATE

📅 12/31/2019

Goals can be associated to one another, which can help employees see how their contributions affect larger, strategic objectives. Browse and choose another goal that this goal should be associated with. The new goal will be a part of any group the related goal was already a part of.

RELATED GOAL

🔍 **Browse**

Goals are public by default to encourage employees to relate goals and work together to meet organizational objectives. Scores and ratings are never publicly visible, but other employees can see goals and descriptions. This is not always desirable, and you can choose to keep this goal private from others not directly involved with this appraisal by selecting the private option.

☐ Private

Creating **R**elevant 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 this due, or when must this be completed/implemented?

Submit   Cancel

E When finished, click **Submit**.

① Open an Appraisal for a Direct Report

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③ Click the Add Goal Button

④ Add Details For the New Goal

⑤ Manage Weights, If Necessary

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

Complete Corporate Leadership Training (0.00%) ⚙ ▾

Complete 6-week course before end of year.

GOAL SCORE TYPE	Scale
PRIVATE	No
START DATE	4/25/2019
TARGET DATE	12/31/2019
COMPLETION DATE	
GOAL STATUS	N/A
RELATED GOAL	🔍 Browse

Details of the new goal display beneath any previously existing goals. In this example the appraisal has a scoring component. Notice the goal's weight is 0%. We'll scroll to the top of the screen and click **Manage Weights** to adjust the weight of this goal on the total appraisal score.

General Appraisal Notes

☑ Add Journal Entry

There are no journal entries.

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

Sales (100.00%)

⚑ Add Goal   ✏ Manage Weights

A Scroll to the top of the screen and click **Manage Weights**.

Secure 2 Verified Leads for your Pipeline (100.00%)

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

Add a Goal Within an Appraisal

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3 — Click the Add Goal Button

4 — Add Details For the New Goal

5 — Manage Weights, if Necessary

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 Weights

×

SECURE 2 VERIFIED LEADS FOR YOUR PIPELINE

100

B — Enter a weight in each field so the total equals 100.

COMPLETE CORPORATE LEADERSHIP TRAINING

0

Submit   Cancel

Sales

Sec...

Add...

GOA...

PRI...

STA...

TAR...

CO...

GOA...

EMP...

MANAGER % COMPLETE: 0%

RELATED GOAL

Close Window

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APPRAISAL INFORMATION   CORE COMPETENCIES (33.34%)   JOB COMPETENCIES (33.33%)   SALES (33.33%)   CONTINUOUS FEEDBACK   SUMMARY

SUP

Sales

Sec

Manage Weights   ✕

SECURE 2 VERIFIED LEADS FOR YOUR PIPELINE

50

COMPLETE CORPORATE LEADERSHIP TRAINING

50

Submit   Cancel

C Click **Submit** when finished.

Add

GOA

PRI

STA

TAR

CO

GOA

EM

MANAGER % COMPLETE: 0%

RELATED GOAL

Close Window

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Manage Weights, if Necessary

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General Appraisal Notes

✔ Success: Goal weights updated ✕

There are no journal entries.

Complete Corporate Leadership Training (50.00%)

⚙

Complete 6-week course before end of year.

GOAL SCORE TYPE	Scale
PRIVATE	No
START DATE	4/25/2019
TARGET DATE	12/31/2019
COMPLETION DATE	
GOAL STATUS	N/A
RELATED GOAL	🔍 Browse

The goal has been added to the appraisal, and the weights are adjusted. Note that from this screen, depending on permissions, a Manager may have access to other Actions, such as **Add Journal Entry**, **Edit**, **Cascade**, **Retire Goal**, and **Delete** a goal.

ACTIONS

☑ Add Journal Entry

✏ Edit

⇄ Cascade

📅 Retire Goal

✖ Delete

General Appraisal Notes

☑ Add Journal Entry

There are no journal entries.

☑ Add Journal Entry

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General Appraisal Notes

✔ Success: Goal weights updated ✕

There are no journal entries.

☑ Add Journal Entry

Complete Corporate Leadership Training (50.00%)

⚙ ▾

Complete 6-week course before end of year.

ACTIONS

☑ Add Journal Entry

✎ Edit

⇄ Cascade

📅 Retire Goal

✖ Delete

GOAL SCORE TYPE	
PRIVATE	
START DATE	
TARGET DATE	12/31/2019
COMPLETION DATE	
GOAL STATUS	N/A
RELATED GOAL	🔍 Browse

This concludes the
Add a Goal Within an Appraisal
click-thru.

General Appraisal Notes

☑ Add Journal Entry

There are no journal entries.