Deltek

Deltek Talent Management 16.3

Performance User Guide

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Contents

Performance User Overview

Use the Performance module to perform all tasks related to appraisals, approvals, employee goal management, employee recognition, and continuous feedback sessions. The options available to you depend on the modules and features in use by your organization.

Managers and employees use the Performance module to monitor and analyze job performance with tools such as goal management, employee recognition, continuous feedback sessions, approval monitoring, and appraisals.

The Employee appraisal process typically has four phases: Planning, Performance, Assessment, and Review. Your firm may decide not to use all of these phases or to have multiples of the same phase at different points in the appraisal process.

Phase 1: Planning

Performance planning is a discussion.

It is the first step in an effective performance management process. It typically involves a meeting between the manager and the employee. During the planning meeting, the employee and manager 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 performing the job, and create an appropriate individual development plan.

Phase 2: Performance

Once planning is completed, it's 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 continual communication and feedback, along with a midterm review to assure that performance is on track.

Phase 3: Assessment

The Assessment phase involves evaluating just how well the individual has performed and filling out the appraisal form.

This phase can include input from the employee’s self-assessment, and assessments by the employee’s direct manager, secondary managers, matrix managers, and peers.

Phase 4: Review

The Review phase is the final step of the appraisal process.

The employee and manager discuss the appraisal in its entirety. Usually both the employee and manager digitally sign the review, showing that it has been completed.

Performance Menu Choices

Access performance functions from employee recognition to appraisals and goal management.

Menu Choices

Menu Choice	Description
Employee Recognition	Recognize an employee for making contributions. Create a recognition entry that explains why the employee is being recognized, references the skill(s) and/or competencies used, and pushes a notification about the recognition to the employee and their manager of the recognition.
Approvals	If you are a designated approver for appraisals, see a list of appraisals that are pending your review and then approve or reject the appraisals.
My Appraisals	Review and perform outstanding appraisal tasks for your own appraisal and those of your direct reports. You can also review your past appraisals and scores.
My 360s	Participate in 360 degree reviews, in which raters from inside and outside of an employee's organization contribute to a performance appraisal. These raters may be peers, superiors, direct reports, customers, or others.
My Goals	Review and create employee goals, which can be managed outside appraisals, as part of a Continuous Goal Management process.
Browse Organizational Goals	Review employees' goals for the current appraisal period.
Continuous Feedback	View scheduled feedback sessions and create new sessions.

Definition of Terms

Certain terms are used throughout the Deltek Talent Performance module.

Terms

Term	Definition
Competencies	Competencies are demonstrable skills that one possesses inherently. Competencies include abilities and behaviors, as well as knowledge of the fundamental use of a skill. Competencies can be added at any time. Generally, a core competency is an ability that everyone in an organization is expected to have and on which they are rated. A job competency is relevant to a specific job title or role.
Goals	Goals are specific actions that an employee is expected to accomplish or participate in during the appraisal period (for example, increase sales by 40% or attend communication boot camp).

Term	Definition
360	In a 360 degree assessment, raters from inside and outside of an employee's organization contribute to the employee's performance appraisal. These raters may be peers, superiors, direct reports, customers, or others.
Rating Scales	For each goal or competency that is being assessed, your administrator can choose the appropriate rating scale. For example, for some goals and competencies, you might use a scale of 1 – 5, in which 1 means Seldom Meets Expectations and 5 means Greatly Exceeds Expectations. For others, you might use a complete/incomplete rating or a percentage of completion rating.

Multiple Ways to Launch a Performance Appraisal

Learn multiple ways to launch a performance appraisal.

How you launch a performance appraisal may depend on your role within your organization, your permissions, and your preferences.

When you launch an appraisal from My Employees or Project Teams, you complete three steps to finalize the process: Step 1: Select Employees, Step 2: Select Performance Workflow, Step 3: Review.

Three Ways to Launch a Performance Appraisal:

On the My Employees Screen: Managers can launch appraisals for direct reports by selecting **Create New Appraisal** on the Actions menu on the My Employees screen.

Through Project Teams: Managers with Project Teams can launch appraisals for their team members on the Performance Tab of the Project Team screen.

As an Administrator:: Administrators can launch appraisals on the Appraisal Administration screen. To do this click the plus icon at the end of a row for a selected employee. Administrators can launch an appraisal this way even if a primary appraisal has been launched by a manager. This can be helpful when hiring a new employee because you can create an appraisal for a 90-day review and start the regular appraisal simultaneously. If the employee does not already have a primary appraisal, this appraisal launched by the administrator is automatically marked as the primary appraisal.

Launch Appraisals Select Employees Step

Select the employees for whom you want to launch an appraisal.

Contents

The employee(s) selected when the Launch Appraisal wizard was launched, either from Project Teams Performance tab or My Employees, are already selected for you. You can also include your other employees and launch all of their appraisals simultaneously.

Field	Description
Employee Name	The employee name. Click this link to open the employee profile.

Field	Description
Employee ID	A unique identifier for this employee.
Manager	The name of the employee's manager.
Organization Unit	The organization to which the employee belongs.
Job Title	The employee's job title.
Location	The name of the employee's company location.
Appraisals	A list of appraisals for the employee. Click a link to open the appraisal.
Next/Cancel	Click **Next** to move to the Select Performance Workflow step. Click **Cancel** to exit the Launch appraisal process.

Launch Appraisals Select Performance Workflow Step

Specify the performance workflow on which to base the appraisal.

Contents

Field	Description
Appraisal Source	Depending upon your permissions, this step gives you options for selecting a workflow: ▪ **Most Closely Associated Workflow**: If you select this option, multiple tables may display at the bottom of the tab for each of your selected employees. Employees are grouped based on which appraisal will be launched for them, which is the one that most closely matches the employee based on the associations selected at the workflow level (such as Organizational Level, Location, Job, Salary Grade or Employee). ▪ **Choose a Workflow**: If you select **Choose a Workflow**, you must then select one workflow from a list of all available workflows. When this option is selected all employees are listed in one table. ▪ **Copy an Appraisal**: If you **Copy an Appraisal**, you then must select from a list of all the current active appraisals for your reports as well as their closed appraisals for the last three years. When this option is selected all employees are listed in one table, as they are all using the same workflow.

Field	Description
Mark Appraisal as Primary	Check **Mark Appraisal as Primary** to use it for reporting and in any other areas of Talent Management where performance scores are referenced.
Appraisal Name	Enter a new name for the appraisal. The workflow name populates this field by default.
Previous/Next/ Cancel	Click **Previous** to return to the Select Employees step. Click **Next** to move to the Review step. Click **Cancel** to exit the launch appraisal process.

Launch Appraisals Review Step

Review your selections before launching the appraisal.

Contents

Field	Description
Workflow	Review the details of the selected workflow, such as appraisal name and source workflow. Click the Edit icon to return to the Performance Workflow step and make corrections.
Employees	View a list of employees for which appraisals will be launched when you click the **Finish** button. Click the Edit icon to return to the Select Employees step and make corrections.
Previous/Finish/ Cancel	Click **Previous** to return to Step 2. Click **Finish** to launch the appraisal.

Employee Recognition Screen

Use the Employee Recognition screen to view or create entries to recognize one or more employee for contributions, and to edit entries created by the currently logged in user.

After a user adds or edits an Employee Recognition entry, a notification is sent to the employee, his or her manager and the user who entered the recognition.

Display the Employee Recognition Screen

You can display the Employee Recognition screen on the Performance menu.

For the Employee Recognition menu option to display, it must be enabled by an administrator for your user group. The feature is enabled on the Features screen (**Administration** » **Global Settings** » **System Administration** » **Features**). This feature is enabled by default, but can be disabled by an Administrator.

To display the Employee Recognition Screen:

Click **Performance** » **Employee Recogntion**.

Contents of the Employee Recognition Screen

View recognitions created by you or for you, and create recognitions for employees who have performed outstanding work.

Contents

The Employee Recognition screen contains a Recognitions Received and Recognitions Given grid, which contain the columns and actions described here. A user can also click the **Create Employee Recognition** button on this screen to recognize one or more employees for work well done.

> **Note:** After a user adds or edits an Employee Recognition entry, a notification is sent to the employee, his or her manager and the user who entered the recognition.

Recognition Received

Field	Description
Employee Recognition Title	This is the description of the recognition given to the currently logged in user.
Creator	This is the name of the individual who created the recognition entry.
Date	This is the date the entry was created.

Recognition Given

Field	Description
Employee Recognition Title	This is the description of the recognition you created for another employee.
Employee	This is the name of the individual whose work you recognized with this entry.
Date	This is the date the entry was created.
Action menu	The following actions are available from the menu for the user who created the entry: ▪ : Click the edit icon to open a page where you can modify details of the recognition.

Field	Description
	▪ ✖: Click the delete icon to remove the recognition.

Create Employee Recognition Entry

You can recognize the work of any employee at any time on the Employee Recognition screen.

This global feature must be enabled before it displays on the Performance menu.

To create an employee recognition entry:

1. Click **Performance** » **Employee Recognition**.
2. On the Employee Recognition screen, click the **Create Employee Recognition** button.
3. In the**Employee** field, click **Select** and enter or select the following search criteria:

Option	Description
Search	Enter a first name, last name or email address.
Manager	Select a manager from the drop-down.

4. Click **Search**.
5. To select an individual in the search results list, click the add icon➕.
6. When all appropriate selections are added, click **Confirm Selection**.
7. In the **Employee Recognition Title** field, enter a name for the entry .
8. In the **Employee Recognition Date** field, verify the date. It should pre-populate with today's date.
9. In the **Employee Recognition Description** field, enter a short description of why you are recognizing the selected employees.
10. In the**Skill Categories** drop-down list, select a category.

    In the **Skills Gained** field use the arrows to select the skills demonstrated by the selected employees.
11. In the **Competency Types** drop-down list, select a type.
12. In the **Competencies Gained** field, use the arrows to select the competencies demonstrated by the selected employees.
13. Click **Submit**.

    After adding the Recognition, a notification is sent to the employee, his or her manager, and the user who entered the Recognition.

Edit Employee Recognition

Use the Edit Employee Recognition screen to update a Recognition that you created.

You must be the creator of the recognition to edit a Recognition.

To edit a Recognition:

1. Click **Performance** » **Employee Recognition**.
2. On the Employee Recognition screen, in the Recognitions Given grid, locate the recognition you want to edit and click the Edit icon from the Actions menu.

   Note: You can also edit a recognition by viewing a given recognition (clicking the link for a given recognition you have created, in the Employee Recognition Title column), then clicking the Edit button in the top right of the view screen.

3. Modify details of the recognition, such as the title, date, description, skills gained or competencies gained.
4. When finished, click **Submit**.

View Details of an Employee Recognition

View details of a particular recognition, such as the employee name, description of recognition, and any skills or competencies the recognized event highlighted.

To view details of a specific Employee Recognition:

On the Employee Recognition screen, click the linked name in the Employee Recognition Title column.
A new screen displays the details of the recognition. Click the View All button to return to the Employee Recognition screen, which lists all recognitions. If you are the creator of the recognition, you can click the **Edit** button and make changes to the details of the recognition.

My Pending Approvals Screen

View and manage approvals that are awaiting your attention, including those associated with appraisals, offers, requisitions, and changes made by your direct reports to their Total Talent Profile.

If You Reject an Appraisal

You can approve or reject an appraisal on this screen. If you reject an appraisal, it automatically moves back to the Assessment phase. When this happens, all appraisers must re-enter their appraisals and all signers must re-enter their signatures.

Display the My Pending Approvals Screen

You can display the My Pending Approvals screen from the Performance menu or from the My Employees menu.

To display the My Pending Approvals screen:

Select one of the following actions:

- On the Approval History or All Pending Approvals screen, click **Performance** » **Approvals** or click the **Pending Approvals** button.
- From the My Employees menu, click **My Employees** » **Approvals**.

Contents of the My Pending Approvals Screen

Depending on the modules that you are using, you can view and approve requisitions, offers, appraisals, and self-service items that direct reports have updated on their Total Talent Profiles.

Requisitions

Requisitions display if you are using the Recruiting module.

Field	Description
Division	This field displays the business unit to which the requisition belongs.
Job Code	This field displays the job code associated with the requisition.
Req #	This field displays the requisition number.
Requisition	Click the link to view details about the requisition.
Date Created	This field displays the date on which the requisition was created.
Recruiter	This field displays the name of the recruiter who manages the requisition.
HM	This field displays the name of the hiring manager.
Attachments	This field displays the number of documents attached to the requisition.
Members	This field displays the number of members connected to the requisition approval process, and lists each member's name.
Actions	Use this field to approve or reject the requisition and, depending on your privileges, to do the following:

Field	Description
	▪ **Add/view Attachments**: Click this to view any attachments for the requisition. ▪ **Edit Requisition**: Click this to modify the requisition. ▪ **Add/View Notes & Transactions**: Click this to see other information related to the requisition.

Offers

Offers display if you are using the Recruiting module.

Field	Description
Candidate	Click the name of the individual being offered a position to view that candidate's résumé.
Offer Date	This field displays the date on which the offer was made official.
Division	This field displays the business unit offering employment.
Job Code	This field displays the job code that signifies the job being offered.
Req #	This field displays the requisition number.
Requisition	Click the link to view details about the requisition.
On behalf of	This field displays the name of the employee’s manager.
Initiated by	This field displays the name of the individual who began the offer process.
Members	This field displays the number of members connected to the approval process, and lists each member's name.
Actions	Use this field to approve, reject, or view the offer.

Appraisals

Appraisals display if you are using the Performance module.

Field	Description
Division	This field displays the business unit to which the employee belongs.
Employee	This field displays the employee’s name. Click the name to display the employee’s Total Talent Profile.

Field	Description
Job Title	This field displays the name of the employee’s job.
Appraisal	This field displays the name of the appraisal (for example, Copywriter or Project Manager) that is being used to evaluate this employee.
System Calculated Rating	This field displays the Overall Rating, which is calculated based on the scores entered by the raters for all competencies, skills, and goals in the appraisal.
Manager Override Rating	Depending on your organization’s settings, a manager may be able to override the automatically calculated Overall Rating. The manager can then enter a different value on the Summary tab of the appraisal during the Review phase.
Manager	This field displays the name of the employee’s manager.
Members	This field displays the number of members connected to the approval process, and lists each member's name.
Actions	Use this field to approve or reject the appraisal.

Self-Service

The Self-Service section displays items that a direct report has edited in the Total Talent Profile, for Core HR Administrators using the Core HR module.

Field	Description
Employee	This field displays the name of the employee who made the change. Click the name to display the employee’s Total Talent Profile.
Attribute	This field displays the name of the field or attribute that was changed.
Previous Value	This field displays the value that was entered for the attribute prior to the change.
New Value	This field displays the change that the employee made to this attribute, which requires your approval.
Effective	This field displays the date on which the change will become effective.
Reason for change	This field displays the reason that the employee gave for the change.
User	This field displays the name of the employee’s manager.
Members	This field displays the number of members connected to the approval process, and lists each member's name.

Field	Description
Actions	Use this field to approve or reject the changes to the Total Talent Profile fields.

Bulk Actions and Buttons

The following bulk actions and button actions are available on this screen.

Field	Description
Bulk Actions	Select each requisition, offer, and appraisal that you want to approve or reject and select the appropriate radio button: ▪ **Approve all selected**: Select each requisition, offer, appraisal, and self-service item that you want to approve and click this button to approve all of them at once. ▪ **Reject all selected**: Select each requisition, offer, appraisal, and self-service item that you want to reject and click this button to reject all of them at once.
View All Pending Approvals	Click this button to see a list of any approvals that are awaiting your attention, including those associated with appraisals. The screen also displays approvals associated with requisitions and offers.
Approval History	Click this button to display a list of all approvals in which you have participated.

Filter Pending Approvals

Follow these steps to filter the pending approvals that display on the My Pending Approvals screen.

To refine the displayed pending approvals:

1. Click **Filter**.
2. Enter values in the following fields, as applicable.

Field	Description
Section to search	In this field, select from the following. You can make more than one selection: ▪ **Requisitions** ▪ **Offers** ▪ **Appraisals** ▪ **All**

Field	Description
	Selecting **Requisitions** or **Offers** in this filter criteria brings up the following subfilters: ▪ **Requisition Title** ▪ **Req #** ▪ **Candidate Name** Selecting **Appraisals** in this filter criteria brings up the following subfilters: ▪ **Employee** ▪ **Job Title** ▪ **Manager** ▪ **Show only Appraisals Assigned to me**
Include History	Select this check box if you want to include the timestamp of all previous approvals.
Organizational Unit	In this field, select the specific organization unit, if necessary.
Approvers	In this field, click **Add** to select specific individuals to include the list of approvers, if necessary.

3. Click **Clear Filter** to reset your view to the default listing.

Approval History Screen

If the Recruiting module is enabled, view approval history for requisitions and offers. If the Performance module is enabled, view approval history for appraisals.

Depending on how you accessed the screen, the corresponding section expands by default and the other sections remain collapsed. For example, if you come to the page via Recruiting > Requisitions > Approvals, the Requisitions section is expanded.

Display the Approval History Screen

How you display the Approval History Screen depends on whether you are accessing Recruiting approval history or Performance approval history.

If Recruiting is enabled, you can view requisition and offer history, and if Performance is enabled, you can view appraisal history on this screen. You can access the screen from either module on the Navigation pane. , if you come to the page via Recruiting > Requisitions > Approvals, the Requisitions section is expanded.

To display the Approval History Screen::

1. Click **Performance** » **Approvals**, or click **Recruiting** » **Requisitions** » **Approvals**, or click **Recruiting** » **Offers** » **Approvals**

2. On the Approvals screen that displays for you, click the **Approval History** button.

Contents of the Approval History Screen

View all approvals in which you have been involved in the process. Depending on the modules you use, this may include Requisitions, Offers, Appraisals, and Self-Service items.

Requisitions

Requisitions display to those using the Recruiting module.

Column	Description
Job Title	Click this link to view details about the selected requisition.
Date Created	The date the requisition was created
Approval Status	A status to indicate where the approval is in the process, such as In Progress, Approved, or Declined
Final Approval Date	The date the requisition has been approved by all members in the workflow.
My Action	The last action taken by the logged in user, such as Approved
Comments	Additional information or notes associated with the requisition

Offers

Offers display to those using the Recruiting module.

Column	Description
Candidate	Click on the name of the individual being offered a position to view the résumé.
Req #	The date the offer was made official
Offer Details	Click to view offer details, such as salary and offer letter.
Date Created	The date the job offer was initiated
Approval Status	A status to indicate where the approval is in the process, such as In Progress, Approved, or Declined
Final Approval Date	The date the job offer was approved by all members of the workflow
My Action	The last action taken by the logged in user, such as Approved.
My Approval Date	The date the currently logged in user approved the offer
Comments	Additional information or notes associated with the offer

Appraisals

Details of all appraisals in which you have participated as an approver display in this grid. Appraisals display to those using the Performance module.

Self-Service

Details of all self-service changes in which you have participated as an approver display in this grid. Self-Service items display to those using the Core HR module.

Column	Description
Employee	The name of the employee who made the change. Click the name to display the employee's Total Talent Profile.
Attribute	The name of the field or attribute that was changed.
Previous Value	The value that was entered for the attribute prior to the change.
New Value	The change the employee made to this attribute that required your approval.
Effective	The date the change will become effective.
Reason for change	The reason the employee gave for the change.
User	The name of the employee's manager.
Final Approval Date	The date the change was approved by all members of the workflow
My Action	The last action taken by the logged in user, such as Approved
My Approval Date	The date the currently logged in user approved the offer

Buttons

The following bulk actions and button actions are available on this screen.

Action	Description
Pending Approvals	Click this button to see a list of any approvals that are awaiting your attention, including those associated with appraisals. The screen also displays approvals associated with requisitions and offers.
View All Pending Approvals	Click this button to display a listing of all pending approvals you have permission to review.

All Pending Approvals Screen

View all pending approvals you have permission to review.

This screen displays all the approvals for requisitions, offers, and performance appraisals that you have permission to review, either as an approver, or otherwise.

If you are an approver, you can approve and reject appraisals on this screen.

Display the All Pending Approvals Screen

You can display the All Pending Approvals screen on the My Pending Approvals or Approval History screen.

To display the All Pending Approvals screen:

1. Click **Performance** » **Approvals**.
2. On the My Pending Approvals or Approval History screen, click the **View All Pending Approvals** button.

Contents of the All Pending Approvals Screen

View details on all pending approvals you have permission to review.

Requisitions

Requisitions display to those using the Recruiting module.

Column	Description
Division	The business unit to which the requisition belongs
Job Code	The job code associated with the requisition
Req #	Requisition number
Requisition	Click the link to view details about the requisition.
Date Created	The date the requisition was created
Recruiter	The name of the recruiter managing the requisition
HM	The hiring manager
Attachments	The number of documents attached to the requisition
Members	This field displays the number of members of the requisition approval process, and lists each member's name.
Actions	Use this field to approve or reject the requisition.

Offers

Offers display to those using the Recruiting module.

Column	Description
Candidate	Click on the name of the individual being offered a position to view the résumé.
Offer Date	The date the offer was made official
Division	The business unit offering employment
Job Code	The job code signifying the job being offered

Column	Description
Req #	Requisition number
Requisition	Click the link to view details of the requisition tied to this job
On behalf of	This field displays the name of the employee’s manager.
Initiated by	The name of the individual who began the offer process
Members	This field displays the number of members of the approval process, and lists each member's name.
Actions	Use this field to approve, reject, or view the offer.

Appraisals

Appraisals display to those using the Performance module.

Column	Description
Division	This field displays the business unit to which the employee belongs.
Employee	This field displays the employee’s name. Click the name to display the employee’s Total Talent Profile.
Job Title	This field displays the name of the employee’s job.
Appraisal	This field displays the name of the appraisal (for example, Copywriter or Project Manager) that is being used to evaluate this employee.
System Calculated Rating	This field displays the Overall Rating, which is calculated based on the scores entered by the raters for all competencies, skills and goals in the appraisal.
Manager Override Rating	Depending on your organization’s settings, a manager may be able to override the automatically calculated Overall Rating. The manager enters a different value on the Summary tab of the appraisal during the Review phase.
Manager	This field displays the name of the employee’s manager.
Members	This field displays the number of members of the approval process, and lists each member's name.
Actions	Use this field to approve or reject the appraisal.

Self-Service

The Self-Service section displays items that a direct report has edited in the Total Talent Profile, for Core HR Administrators using the Core HR module.

Column	Description
Employee	The name of the employee who made the change. Click the name to display the employee’s Total Talent Profile.

Column	Description
Attribute	The name of the field or attribute that was changed.
Previous Value	The value that was entered for the attribute prior to the change.
New Value	The change the employee made to this attribute that requires your approval.
Effective	The date the change will become effective.
Reason for change	The reason the employee gave for the change.
User	This field displays the name of the employee's manager.
Members	This field displays the number of members of the approval process, and lists each member's name.
Actions	Use this field to approve or reject the changes to the Total Talent Profile fields.

Bulk Actions and Buttons

The following bulk actions and button actions are available on this screen.

Action	Description
Bulk Actions	Check each requisition, offer and appraisal you want to approve or reject and select the appropriate radio button: ▪ **Approve all selected:**Check each requisition, offer, appraisal, and self-service item you want to approve and click this button to approve all at once. ▪ **Reject all selected:**Check each requisition, offer, appraisal, or self-service item you want to reject and click this button to reject all at once.
Pending Approvals	Click this button to see a list of any approvals that are awaiting your attention, including those associated with appraisals. The screen also displays approvals associated with requisitions and offers.
Approval History	Click this button to display a listing of all of the approvals in which you have participated.
Submit	Select the requisitions, offers, and appraisals to approve and click **Submit**.

My Appraisals Screen

Use the My Appraisals screen to see all of your current appraisal activities as well as a history of your past appraisals.

Display the My Appraisals Screen

Follow these steps to display the My Appraisals Screen.

To display the My Appraisals screen:

Click **Performance** » **My Appraisals**.

Contents of the My Appraisals Screen

View all of your current appraisal activities, as well as a history of your past appraisals.

Sections

Field	Description
Appraisal Tasks	This section lists any appraisal-related tasks that are awaiting your attention. Click any hyperlink (for example, **Sign this Appraisal**) to complete the task.
Active Appraisals	This section lists all of your appraisals that are in one of the four active phases: Planning, Performance, Assessment, or Review. Click on the appraisal name or select **View Appraisal**on the Action menu to display the appraisal. For each appraisal, you can see: ▪ **Appraisal Launch Date**: This is the date that the appraisal was created. ▪ **Scale**: This is the name of the rating scale used in the appraisal. ▪ **Phase**: This is the current phase of the appraisal: Planning, Performance, Assessment, or Review. If you have more than one current appraisal, a star displays next to the one designated as the primary appraisal.
Finished Appraisals	This section lists all of your past completed appraisals. It does not include any cancelled appraisals. The score of the most recently completed appraisal is used to position an employee in the 9-box. It displays wherever an appraisal is referenced elsewhere in Deltek Talent Management. Click the appraisal name or select **View Appraisal**on the Action menu to display the appraisal. For each appraisal, you can see: ▪ **Closed Date**: This is the date that the appraisal was completely closed.

Field	Description
	▪ **Scale**: This is the name of the rating scale used in the appraisal. ▪ **Overall Scale Score**: This is the final performance rating for the employee, calculated using the individual competencies, goals, and skills in the appraisal.

Performance Appraisal Screen

During the Assessment phase, employees and managers at all levels rate employees.

Participants in an appraisal process follow a workflow set up by the administrator. This workflow may include multiple stages, including additional assessments from peers, second level managers, matrix managers, and outside sources. As part of setting up the appraisal workflow, the administrator selects the competencies and goals on which the appraisal will be based.

At the top of the Appraisal Information tab, you can see the appraisal's current stage. A message in a colored ribbon at the top of the screen tells you what action is required to move the appraisal to the next phase.

When managing performance appraisals from this screen, the details of the appraisal are organized on tabs. All performance appraisals have an Appraisal Information tab and a Summary tab. Some have additional tabs, depending on your role within the company.

Display the Performance Appraisal Screen

Display the Performance Appraisal screen for a particular appraisal by clicking an appraisal link anywhere within Deltek Talent Management, for example, as an employee you may access the screen on the My Appraisals screen. As an administrator you may access it on the Appraisals Administration screen.

To display a performance appraisal do one of the following:

1. Click **Performance** » **My Appraisals**.
2. On the My Appraisals screen, click a linked appraisal name.

or

3. Click the Administration icon.
4. In the Performance section under Appraisals, click **Appraisal Administration**.
5. Click any blue triangle icon next to an employee name to view appraisals for that employee.
6. Click a linked appraisal name.

Tabs of the Performance Appraisal Screen

The contents of each appraisal is organized into various tabs.

Appraisal Information Tab

View appraisal information organized into sections such as Signature Log, General Appraisal Notes, and Appraisers, and complete actions such as printing or adding journal entries.

Sections

Section	Description
Steps 1 through…	A gray ribbon shows all the steps in the appraisal process. The current step, or phase, is shaded blue. Notes in the blue ribbon at the top of the screen indicate the next appraisal action, such as moving to the next phase or signing.
Signature Log	The Signature Log shows who is required to sign the appraisal and during which phase they must sign it. The log also shows any additional requirements for the signatures, such as who needs to sign first.
General Appraisal Notes	Use the General Appraisal Notes area to view and enter general comments about the appraisal. These comments do not have to be associated with a specific item in the appraisal.
Appraisers	The Appraisers section shows who is providing input into the appraisal and in what order they are providing it. Depending on your permissions, you may also be able to see the weight given to each appraiser's input.
Scale	The Scale section provides appraisers with information about the scale used to evaluate this employee. For example, you might have a scale of 1 -5 in which 1 means Seldom Meets Expectations and 5 means Greatly Exceeds Expectations. Depending on your permissions, you may also see phases requiring approval and a list of names of the employees in the approval chain.

Buttons

The buttons on the Appraisal Information tab perform the following functions.

Button	Description
Print Appraisal	Click this button to open the Print Appraisal screen, which lets you select the sections that you want to include in the printed appraisal. See the "Print Appraisal Screen" section.
Add Journal Entry	Click this button to add a comment to the General Appraisal Notes. Enter a subject line and a comment and select the people who can see the comment in addition to yourself: ▪ **All**: The entry can be viewed by administrators, managers, appraisers, and the employee. ▪ **Employee**: The entry can be viewed by administrators and the employee.

Button	Description
	▪ **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.

Achievements Tab

Record achievements throughout the appraisal cycle.

Contents

An Achievements tab displays on the appraisal If the workflow associated with the appraisal includes the Achievements category. The **Achievements** category allows you to record achievements throughout the appraisal cycle. Achievements are not weighted and are not scored.

Field	Description
Achievement Name	Achievement names display in shaded rows.
Description	The short description entered at time of creation displays beneath the name.
General Appraisal Notes	Journal entries display in this section.
Add Journal Entry	Click to open a modal window and enter details such as name, description and who can view the entry.
Add Achievement	Click to enter a name and description for a new achievement.
Actions Menu	▪ Select Edit to modify details of an achievement. ▪ Select Delete to remove the achievement.

Core Competencies Tab and Job Competencies Tabs

The appraisal administrator determines which competencies are evaluated in an employee appraisal.

All employees in an organization may be evaluated based on the same competencies, or competencies may differ by role, department, and so on.

An employee is evaluated based on how well he or she demonstrates these competencies during the evaluation period.

Deltek Talent Management distinguishes between two types of competencies and displays them on separate tabs in the employee appraisal.

- **Core Competencies**: These are general abilities that everyone in an organization is expected to have and on which they are rated.
- **Job Competencies**: These are abilities that are relevant to a specific job title or role.

  Your organization can add its own competency categories, which will be treated in the same way as Core Competencies. Each category added will have its own tab.

  Different competencies and goals may have different weights so that, for example, Decision Making is weighted more heavily than Teamwork in an employee's Overall Rating.

Sections

The Core Competency and Job Competency tabs have the following parts.

Section	Description
Core Competencies	This section displays the name and description of each competency on which the employee is being appraised.
Summary Notes	If your organization enabled the Appraisal Category Summary Notes feature, a Summary Notes section displays beneath the Category name. Click the **Add Journal Entry** button to add or edit notes that apply to all competencies in this category.
General Appraisal Notes	Use the General Appraisal Notes area to view and enter general comments about the competency above.

Actions

The actions available from the Actions menu and buttons on the Core Competency and Job Competency tabs perform the following functions.

Button/Icon/	Action	Description
	**Add to Development Plan**	Click this option to add the competency to a Development Plan. Define options for the plan, such as the Plan Name and Start Date and click **Save** when finished.
	**Collapse All Notes/ Expand All Notes**	Click this button to display and hide the General Appraisal and Summary Notes.
	**Manage Competencies**	Click this button to display the Manage Competencies dialog. Add available competencies from the list, and manage weights from this dialog. Click **Submit** when done. Depending on permissions and how the appraisal's workflow is configured to allow additions to this category, the Manage Competencies button may not be available.
	**Add Journal Entry**	Click this option or button to add a comment to the General Appraisal Notes. Enter a subject line

Button/Icon/	Action	Description
		and a comment, and select the people who can see 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.
	**Organizational Score Trends**	Click this option to display a bar chart that shows how your score on this competency compares to the scores of other employees: ▪ With the same job title ▪ In the same job family ▪ Across the organization as a whole
	**My Historical Scores**	This option displays when the employee has a past appraisal that includes appraisals, and when the logged in user belongs to a group with the Historical Scores feature enabled. Click this option to display a line graph that shows how the score on this competency has changed over the course of multiple appraisals. The graph includes scores from all completed appraisals that included this competency.

Competencies

An overview of Competencies and how to use, add and manage them.

Competencies are demonstrable skills that one possesses inherently. Competencies include abilities and behaviors, as well as knowledge of the fundamental use of a skill.

For Administrators

Administrators configure Competency categories **(Administration icon >> Global Settings >> Your Organization >> Competencies)** that employees and managers will chose from when selecting competencies. Administrators can edit categories, activate/deactivate categories, add new categories, and add new competencies within categories (On the Competencies Category screen >> Click **Add a New Competency**).

For Employees and Managers

Competencies can either be self-nominated by an employee, or earned through a job position, an appraisal, or a project team.

About Self-nominated Competencies

You self-nominate a competency by adding it to your Total Talent Profile (On the Overview tab, Competencies section). After self-nominating, the competencies display on the Total Talent Profile with an **Approval Date** of **Awaiting Approval**, and are immediately added to the **Competencies Gained** table on the Competency Profile screen. Your manager must approve each competency on the Competencies screen.

About Earned Competencies

Managers can acknowledge an employee's competencies by adding competencies via a job position, an appraisal, or a project team. For example, on the Project Team screen for a particular project team (Employees>>My Employees>>Project Teams>>Select Edit from the Actions menu for a particular project team), a manager can select **Competency Types** and **Competencies Gained** for the Project Team members.

Display the Competencies Screen

You can display the Competencies screen on the New Skills and Categories widget, on the Main Dashboard.

You must have the New Skills and Competencies widget installed on the Main Dashboard before accessing the Competencies screen.

To display the Competencies screen:

On the New Skills and Competencies widget, on the Main Dashboard, click the number link in the Competencies column for the direct report whose Competencies you want to manage.
The Competencies screen displays competencies awaiting your approval, as well as all competencies earned for the selected employee.

Contents of the Competencies Screen

As a manager, view a list of a direct report's competencies accessible from the New Skills and Competencies widget. The list includes competencies earned and those awaiting your approval.

Contents

Field	Description
Competencies to Approve	This section lists any competencies that have been added by a direct report and are awaiting your approval. Click ✔ in the Actions column to approve a competency. Click the Delete icon to delete the competency.

Field	Description
[Specific Competency Name]	This section lists all Competencies earned to date for the selected employee. Under each Competency name is a description, the source of the competency, the score, and the date the competency was approved, or a status, **Awaiting approval**.

Display the Competency Profile Screen

You can display the Competency Profile Screen on the Total Talent Profile.

To display the Competency Profile Screen:

1. On the Total Talent Profile for you or one of your direct reports, click the Overview tab.
2. Scroll to the Competencies and Skills section.
3. Click the edit icon in the Action column of a competency, or click **Manage Competencies**.

Contents of the Competency Profile Screen

View, add, score, and delete competencies gained for the selected employee.

Contents

Section	Description
Competency Types	This section lists all available competency types or categories. Click on a competency type to score and add competencies for the selected employee.
Competencies	When you click a competency type, the specific competencies associated with this type display in this area. Select a value from the **Score** field for each competency and click **Submit** .
Competencies Gained	This section lists all Competencies earned to date for the selected employee including details such as the name, the category or type, and the score for the competency. You can delete the competency by clicking in the Actions column.

Goals Tab

Goals associated with an appraisal are specific actions that an employee is expected to accomplish or participate in during the appraisal period (for example, increase sales by 40% or attend communication boot camp).

The appraisal administrator determines which goals are evaluated in an employee appraisal. Depending on permissions, administrators can add goals from the Goal library, add goals directly within the appraisal, or pull Employee Goals into an appraisal. All employees in an organization may be evaluated based on the same goals, or different groups within your organization may have different goals.

Employees with the appropriate permissions can add goals within their own appraisal, however the appraisal manager must approve these goals before they are added to the appraisal.

The employee is evaluated based on how well he or she accomplishes these goals during the evaluation period.

Contents

The Goals tab displays the following fields.

Field	Description
Goal Name	The name of the goal, and depending on permissions, the weight associated with the goal.
Goal Description	The description of the goal.
Goal Score Type	This field displays the way in which the employee will be evaluated on this goal: ▪ **No Score**: The goal is used only for tracking purposes and has no effect on appraisal scoring. ▪ **Scale**: The goal is measured based on the scale used in the appraisal. ▪ **Percentage Complete**: The goal is measured based on progress toward 100% completion**.** ▪ **Numerical**: The goal is measured based on a numerical target, such as a sales quota. ▪ **Complete/Incomplete**: The goal is either completed in its entirety or not at all. This type of scoring is suited to a task-based activity.
Private	This field displays whether the goal is **Public** or **Private**. Only public goals display in the organization-wide list of goals that can be searched and associated with an appraisal.
Start Date	This field displays the expected start date for work on the goal.
Target Date	This field displays the expected end date for work on the goal.
Completion Date	This field displays the date the goal is actually completed.
Goal Status	This field displays a description of the employee's progress in completing the goal, as evaluated by the employee, manager, or administrator. Possible values are: **Not Started**, **At Risk**, **On Track**, **Ahead of Schedule**, **Past Due**, **Completed Late**, and **Completed**.
Numeric Progress	This field is used only with the Numerical Score type. It is the value that represents the employee's actual performance, entered by the employee or manager.

Field	Description
	For example, if an employee has a goal to sell 12,500 units but only sells 11,000, the **Numeric Progress** value is 11,000. The **Numeric Progress** value cannot be greater than the **Numeric Target** value.
Numeric Target	This field is used only with the Numerical Score type. It is the target value set when the goal is first entered. For example, if an employee has a goal to sell 12,500 units but only sells 11,000, the **Numeric Target** value is 12,500. The **Numeric Progress** value cannot be greater than the **Numeric Target** value.
Related Goal	Goals can be associated with 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 of the related goal's groups.
General Appraisal Notes	Use the General Appraisal Notes area to view and enter general comments about the competency above.
Actions	Click  for a list of actions. See the Actions section for details.

Actions

The buttons and icons on the Goals tab perform the following functions. The actions you see depend on permissions, as well as the type of goal.

Button/Icon	Action	Description
	**Collapse All Notes/Expand All Notes**	Click this button to display and hide the General Appraisal Notes
	**Add Journal Entry**	Click this icon to add a comment to the General Appraisal Notes. Enter a subject line and a comment and select the people who can see 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.

Button/Icon	Action	Description
		▪ **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.
	Edit	Click this icon to modify details, such as **Goal Name**,**Description**,**Start Date**, **Target Date**, **Completion Date**, **Goal Status**, **Numeric Progress**, **Numeric Target** value, **Manager % Complete**,**Private**.
	Cascade	Click this icon to apply this goal to additional employees. Search for individual employees or select employees that belong to a specific business unit, report to a specific manager, or meet other selection criteria. See the “Cascade a Goal” section.
	Retire Goal	Click this icon to Retire goal.
	Delete	Click this icon to delete the goal.

Add a Goal Within an Appraisal

Depending on permissions and the configuration of the workflow on which an appraisal is based, managers and/or employees can add goals within an appraisal.

To allow a manager to create and assign goals to his/her employees or to cascade goals, or to allow employees to create goals and have the ability to track their progress on these goals during the appraisal cycle, an administrator must first configure these permissions in a workflow. Then, this workflow must be associated with the appraisal when it is launched. If the workflow does not allow goal additions, the employee and manager cannot add goals.

To add a goal within an appraisal:

1. On an appraisal where you want to add a goal, at the top of the Appraisal screen, click the Goal Category link that corresponds to the type of goal you want to add.
2. On the Goal Category tab, click **Manage Goals**.
3. To simply add additional goals within the category, click the add icon in the Available Items section.

The goal is added to the Selected Items section and the weights of all goals are equally distributed to add to a total weight of 100.

4. To add a new goal, click **Add Goal**.
   The Add Goal dialog displays.
5. Do one of the following to add a goal by importing another goal and tailoring details, or adding a goal from scratch:
   - **To import a goal:** In the Import section, click one of the options to import goals. Options available depend on your role and your permissions (**Browse Library**, **Browse Manager**, **Browse Manager's Direct Reports**, or **Browse Employee Past Appraisals**).
   - **To create a new goal from scratch:** Fill in the fields on the form to create a new goal from scratch.
   - **Goal Name**: Enter a name for the goal.
   - **Goal Score**: Select how the appraisal will be assessed. For example, No Score or Percentage Complete.
   - **Description**: Enter a short description of the goal.
   - **Start Date**: Select the date work will begin on completing the goal.
   - **Target Date**: Select the date of expected goal completion.
   - **Related Goal**: Goals can be associated with 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 of the related goal's groups.
   - **Private**
   - **Public**: : Check to mark the goal **Private**. Leave unchecked to mark the goal **Public**.Only public goals display in the organization-wide list of goals that can be searched and associated with an appraisal. Scores and ratings are never public, regardless of this setting.
6. Click **Submit**.
   The goal is added to the Selected Items section and the weights of all goals are equally distributed to add to a total weight of 100.

Browse Goals Screen

Use the Browse Goals screen to review a list of employees in your organization and, if you have the necessary security permissions, see employees' goals for the current appraisal period.

Goals can have a **Public** or **Private** setting, with the default being **Public**. Only public goals display on the Browse Goals screen.

The employees are listed in alphabetical order by last name then first name.

- If an employee name has + next to it, this means that the employee has direct reports. Click + to see the names of the direct reports.

- If an employee name has an asterisk next to it, this means that the employee has goals set for the current appraisal period. Click on the employee name to see information about each goal, including the goal description, how the goal was assigned to the employee, the goal score type, the start date for the goal, and the target completion date for the goal

Goal Score Types

The Goal Score Type has five values from which to choose.

- **No Score**: The goal is used only for tracking purposes and has no effect on appraisal scoring.
- **Scale**: The goal is measured based on the scale used in the appraisal.
- **Percentage Complete**: The goal is measured based on progress toward 100% completion.
- **Numerical**: The goal is measured based on a numerical target, such as a sales quota.
- **Complete/Incomplete**: The goal is either completed in its entirety or not at all. This type of scoring is suited to a task-based activity.

Skills Tab

View and manage a list of skills that are part of the appraisal.

Contents

The Appraisal Administrator determines which skills are evaluated in an employee appraisal and adds those skills either at the Workflow level, so they display on the Skills tab, or using the **Manage Skills** button to add skills directly from the Skills tab.

The employee is evaluated based on how well he or she has demonstrated mastery of these skills during the evaluation period. If an appraisal is based on a Workflow configured with a scoring option, skills are scored according to scoring protocol, similar to the way Competencies are scored. When the appraisal is closed some information, such as Skill Name and Skill Category, pass directly to the Overview tab of the employee's Total Talent Profile. For new skills the Date Added field is populated with the current date. For skills that were updated, the Date Updated field is populated with the current date. The Is Endorsed field value is also set to **Y**, and does not require additional approval from a Manager.

Skill Sections

Under the Skill Category heading at the top of the screen is a list of skills, each with the following fields and options. If your organization enabled the Appraisal Category Summary Notes feature, a Summary Notes section also displays beneath the Category name. Click the **Add Journal Entry** button to add or edit notes that apply to all competencies in this category.

Field	Description
Skill Name	The skill name. Depending on permissions you may see a weight as a percentage next to the name.

Field	Description
General Appraisal Notes	Notes added as journal entries for this skill. Click **Add Journal Entry** to add a note for this skill.

Actions

The buttons on Skills tabs perform the following functions.

Field	Description
Collapse All/ Expand All Notes	Click this button to display and hide the General Appraisal and Summary Notes.
Manage Skills	Click this button to open the Manage Skills dialog, where you can select skills to add to the appraisal. Depending on permissions and how the appraisal's workflow is configured to allow additions to this category, the Manage Skills button may not be available.

Add a Skill to an Appraisal

Depending on permissions and the configuration of the workflow on which an appraisal is based, managers and/or employees can add skills within an appraisal.

To allow a manager to create and assign skills, an administrator must first configure these permissions in a workflow, and this workflow must be associated with the appraisal when it is launched. If the workflow does not allow the addition of skills, the Manage Skills button does not display.

- To add skills, click **Manage Skills**. This opens a modal window.
- Click on the **Skill Category** name to view all the skills included in it.
- Click the **Add** next to the skill that you want to add. You may also be required to enter or adjust weights for the skills. Skills must add up to a total of 100%. A running total is kept for you.
- Once all of your selections are made, click the "Submit" button.

To add a skill within an appraisal:

1. On an appraisal where you want to add a skill, click a skill category link at the top of the screen. For example, Main Skill Category.
2. Click **Manage Skills**.
3. On the Manage Skills modal, click a skill category name in the Available Items list.
4. In the list of skills that displays, click the ➕plus icon for the skill(s) you want to add.
5. If required, in the Selected Items list, enter or adjust weights for the skills. Skills must add up to a total of 100%. A running total is kept for you.
6. When finished, click **Submit**.

Recognition Tab

The Recognition tab displays all Recognitions created for this employee between the appraisal launch date and the appraisal close date.

With Employee Recognition enabled, administrators, employees, managers, and approvers with access to the appraisal can access the Recognition tab. The information on the tab is read-only.

Action

The button on the Recognition tab performs the following function.

Action	Description
Print Appraisal	Click this button to open the Print Appraisal screen and select the sections to include in the printed appraisal.

Continuous Feedback Tab

The Continuous Feedback tab lists any sessions which have been scheduled between the appraisal launch date and the appraisal end date.

Administrators, employees, managers, and approvers can access the Continuous Feedback tab. The information displayed on the tab is read- only.

Action

The button on the Continuous Feedback tab performs the following function.

Action	Description
Print Appraisal	Click this button to open the Print Appraisal screen and select the sections to include in the printed appraisal.

Summary Tab

The Summary tab displays all of the competencies and goals in the appraisal, and all ratings to date.

Managers and administrators can see all of the ratings from all appraisers. Depending on your organization’s settings, employees may be able to see all ratings, too.

The bottom section displays the Overall Rating, which is calculated based on the scores entered by the raters for all competencies, skills and goals in the appraisal.

Action

The button on the Summary tab performs the following function.

Action	Description
Print Appraisal	Click this button to open the Print Appraisal screen, which lets you select the sections that you want to include in the printed appraisal.

Print an Appraisal

If you have access to edit appraisal print options, you can choose the sections that are included on the Print View screen (Step 2), in PDF Format, and when printed to hard copy.

Appraisal users must have certain features enabled before they can create and/or modify default print settings for the organization, or define and save their own default print settings in Step 1 of the Print Appraisal Workflow:

- **Global Print View Configuration**: This feature must be enabled for a group to have access to configure a default print configuration for the organization (**Administration » Features » Performance » Appraisals » Global Print View Configuration**). If the sub-feature, **Lock Configuration** is enabled (**Administration » Features » Performance » Appraisals » Appraisal Administration » Lock Configuration**), then users in the group will not be able to override the default print configuration.
- **Users Print View Configuration:** This feature (**Administration » Features » Performance » Appraisals » Users Print View Configuration**) must be enabled.

> **Note:** When setting print options, be aware that for each phase of the appraisal process – Planning, Performance, Assessment, and Review – the Print Appraisal screen lists all of the sections that are available for inclusion. If a section is not relevant for a particular phase, **N/A** displays.

To print a performance appraisal:

1. Open an appraisal from Performance » My Appraisals, from My Employees, or from Appraisal Administration.
2. On the Appraisal screen, click the **Print Appraisal** button, which displays on several tabs, including the Appraisal Information and Summary tabs.
3. On the Print Appraisal screen, select the sections that you want to include in the printed copy:
   - 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**, **Appraisal Review Comments**, or **Journal Entries**, 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.

4. To restore the default print settings configured by an administrator, click **Restore Default View**. You can return to this step to restore defaults at any time.
5. Click **Next** to display the appraisal as it will appear when printed.
6. Generate the printed copy:
   - Click **Download as PDF** to generate a PDF file of the appraisal, which you can open or save.
   - Click **Print** to print a hard copy of the appraisal.

Appraisal Signatures Screen

Use the Appraisals Signatures screen to see who has already signed an appraisal or to sign it yourself.

Display the Appraisal Signatures Screen

Follow these steps to display the Appraisal Signautres screen.

To display the Appraisal Signatures screen:

1. Click **Performance** » **My Appraisals**.
2. On the My Appraisals screen, in the Appraisal Tasks section, click **Sign this Appraisal** next to an appraisal name.

Contents of the Appraisal Signatures Screen

The Appraisals Signatures screen has the following sections.

Section

Section	Description
Core Competencies/Job Competencies/Goals	These sections display all of the competencies and goals on which the employee is being evaluated. Managers and administrators see a table for each section of the appraisal, with the competencies/goals/skills listed along with each rater’s scores. Depending on your organization’s settings, employees may see the same information. For each item, you can see the employee’s **Overall Score**.
Overall Scores	This section displays the employee’s overall scores for the entire appraisal. Depending on your organization’s settings, this score can be expressed in up to three different ways:

Section	Description
	▪ **Raw Scale Score**: This is the detailed score based on the appraisal scale. It is a decimal value and is not rounded to the nearest scale value. For example, you may see a score of 3.63 for a 5 point scale rating. ▪ **Overall Scale Score**: This is the raw scale score rounded to the nearest scale value. For example, a 3.63 score on a 5 point scale would be rounded to 4. ▪ **Raw Percentage Score**: This is the raw scale score divided by the scale's upper limit. For example, for a 3.63 score on a 5 point scale, 3.63 would be divided by 5 for a final score of 72.6%.
Signature	Use this section to provide an electronic signature, confirming that you approve of the appraisal ratings.

Sign an Appraisal

Steps to sign off on an appraisal.

To sign an appraisal:

1. Click **Performance** » **My Appraisals**.
2. On the My Appraisals screen, in the **Appraisal Tasks** section, click **Sign this Appraisal** next to an appraisal name.
3. Review the appraisal scores and make sure that you are satisfied with them.
4. Select the **Please confirm your signature** check box.
5. In the **Username** and **Password** fields, enter the same credentials that you use to log into Deltek Talent Management.
6. Optional: In the **Comment** field, enter a comment to accompany your signature.
7. Click **Submit**.

Score this Appraisal Screen

Use the Score this Appraisal screen to perform your self-appraisal or score another employee's appraisal.

> **Note:** After you finish entering and saving scores, you still have the opportunity to edit scores and comments. You can change your ratings even after you click **Finish**, provided that the appraisal is still in the Assessment phase.

Once all scores are submitted by all appraisers, the appraisal is ready to move to the next phase. This may happen automatically, based on a schedule set up by the administrator, or the manager may need to move it manually, in the section above the tabs.

Display the Score this Appraisal Screen

Display the Score this Appraisal screen on the My Appraisals screen.

To display the Score this Appraisal screen:

1. Click **Performance** » **My Appraisals**.
2. On the My Appraisals screen, in the Appraisal Tasks section, click **Score this Appraisal** next to an appraisal name. This link displays only if the appraisal is in the Scoring phase of the workflow.

Contents of the Score this Appraisal Screen

View details about what is being evaluated on an appraisal.

Sections

Section	Description
Core Competencies/Job Competencies/Skills	These sections display all of the competencies and skills on which the employee is being evaluated, with a description of each one. For each competency and goal, a graph displays, showing the score entered by each appraiser. Use the **Your Rating** area to enter scores. Depending on how the appraisal is set up, you may enter a scale rating, select a rating from a drop-down list, or enter scores in another way. Entering a comment may be mandatory or optional. Select a score to see a rating tip, which can help you determine if the rating is appropriate. In the **Comment** field, enter a description of the employee's performance that explains the score that you chose. In the **Comment can be viewed by** field, select one of the following: ▪ **All**: The entry can be viewed by administrators, managers, appraisers, and the employee. ▪ **Managers**: The entry can be viewed by administrators and managers only. ▪ **Employee**: The entry can be viewed by administrators, managers, and the employee. ▪ **Other Raters**: The entry can be viewed by administrators, managers, and other raters. ▪ **Private**: The administrator and the person entering the comment are the only ones who can view a private entry.
Goals	This section displays all of the goals on which the employee is being evaluated, with a description of each one.

Section	Description
	The way in which you enter scores depends on the **Goal Score Type**: ▪ **Complete/Incomplete**: Select the **Goal Complete** check box if the goal is complete. ▪ **Percent Complete**: Enter a number to represent the percentage of the goal that is complete. ▪ **Numeric Target**: Enter a number to represent the actual progress toward the target goal. ▪ **Scale**: Select a value from the scale. The **Comment** and **Comment can be viewed by** fields work the same way for goals as they do for competencies.

Buttons

The buttons on the Score this Appraisal screen perform the following functions.

Button	Description
Expand All Notes/ Collapse All Notes	Click **Expand All Notes** to display: ▪ Any journal entries that the employee or others have created to describe the employee's performance in relation to this competency or goal. ▪ Any comments that appraisers have already entered into the appraisal. Click **Collapse All Notes** to hide the journal entries and comments. You can also click **Expand** and **Collapse** next to a competency or goal to control the notes for that individual item.
Finish Later	Click this button to save your work and complete the appraisal later.
Next	Click this button to review your scores, then click: ▪ **Previous** to return to the appraisal screen and make changes. ▪ **Finish Later** to save your work and complete the appraisal later. ▪ **Finish** if you are satisfied with your scores and have no more changes to make. You can change your ratings even after you click **Finish**, provided that the appraisal is still in the Assessment phase.
Save	Click this button to save your work and continue working on the appraisal form.
Cancel	Click this button to clear all unsaved entries. Clicking this button does not clear any previously saved entries.

Score an Appraisal

Steps to score an appraisal.

An appraisal must be in the Scoring phase of a workflow before the **Score this Appraisal** link displays in the **Appraisal Tasks** section.

To score an appraisal:

1. Click **Performance** » **My Appraisals**.
2. On the My Appraisals screen, in the **Appraisal Tasks** section, click **Score this Appraisal** next to an appraisal name.
3. Click **Expand All Notes** to see any journal entries and progress notes.
4. For each competency and goal, enter a rating and a comment and select a value from the **Comment can be viewed by** drop-down list.
5. Click **Finish Later** and complete the assessment at another time, or click **Next** to review all of the ratings that you entered.
6. When you are satisfied with your ratings, click **Finish** to submit your assessment.

   You can change your ratings even after you click **Finish**, provided that the appraisal is still in the Assessment phase.

Reassign an Appraisal

You can assign a direct report's appraisal to another manager if you feel that someone else is better suited to rate the employee.

You make the reassignment in the My Employees area, not in the Performance area.

> **Note: Reassigning an appraisal in the Review phase does not change appraisal scores. For example, if Laura Lopez enters ratings, then the appraisal is reassigned to Jason Marcus, Jason does not need to rate the employee. Laura's scores remain in place and are identified as belonging to her.**

To reassign an appraisal to another manager:

1. Click **My Employees** » **My Employees**.
2. On the My Employees screen, find the appraisal.
3. Click » **Reassign** in the Actions column next to the appraisal.
4. Search for and select a new manager.
5. Enter a note explaining the change.
6. Click **Submit**.

Employee Goals Screen

Employees can add goals outside the Appraisal process as part of Continuous Goal Management.

The Employee Goals screen is available if an administrator has enabled Employee Goals for your role. Depending on configuration, users may have rights to copy goals from the Goals library, or from other users such as managers, your manager's direct reports, and your past goals. Users may also have rights to add goals from scratch, to delete goals, and/or to retire goals. Goals added on the Employee Goals screen are tracked separate from appraisals, as part of a Continuous Goal Management process. However, administrators with the proper rights can associate an employee goal with an appraisal by selecting the Employee Goals category when configuring the Performance Workflow, then adding the desired goals on the Content step.

Display the Employee Goals Screen

Employees access goals they created or those created for them on the Performance menu. Managers access the Employee Goal screen for a specific direct report on the My Employees screen.

To Display the Employee Goal Screen:

As an employee, click **Performance** » **My Goals** or as a manager, click **My Employees** » **My Employees**, and then for the employee whose goals you want to review, click **Goals**.

Contents of the Employee Goals Screen

View details related to employee goals created outside the appraisal process, such as name and completion date, and perform actions, such as editing, changing status, retiring and deleting.

Contents

Field	Description
Goal Name	Click the goal name to view details about the goal.
Progress	A numeric score indicating the employee's progress on the goal.
Start Date	The date the goal was set.
Target Date	The date of anticipated goal completion.
Completion Date	The actual date the goal was completed.
Status	Status of the goal from a set of pre-defined values such as Not Started or At Risk.

Field	Description
Actions	Employees can edit goals, change the status of the goal, retire or delete a goal.

Add an Employee Goal

Employees and managers can add goals for themselves or their direct reports by clicking **Create Employee Goal** on the Employee Goals screen.

Instructions vary slightly depending on whether you are adding a goal as an employee or as a manager for a direct report.

Add an Employee Goal for Yourself

Employees can add goals for themselves, which they manage outside the appraisal process.

Depending on configuration, users may have rights to add employee goals by importing goals from the Goals library, or from other users such as managers, your manager's direct reports, and your past goals. Users may also have rights to enter information in the fields on the screen, to create a goal from scratch.

To add a goal for yourself:

1. Click **Performance** » **My Goals**.
2. Click **Create Employee Goal**.
3. Click on a link in the Import section to use an existing goal as a template for your goal, or skip to step 4 to create a goal from scratch. If you import a goal, you can edit any of the details you import in the next step.
4. Enter information in the following fields:

Option	Description
Goal Name	Enter a name for your goal.
Goal Score Type	Select a score type, such as **No Score** or **Percentage Complete**.
Description	Enter a short description of the goal.
Start Date	Select the date you will begin progress toward meeting this goal.
Target Date	Select the date you expect to complete the goal.
Related Goal	Click **Browse** to link this goal to another goal, perhaps one with the same larger strategic objective.

Option	Description
Private	Click to mark the goal private, which hides it from users who are not directly involved with any appraisal the goal may be linked with at a later date. Scores and ratings are always private, regardless of this option.

5. Click **Submit** to save the goal.

Add an Employee Goal for a Direct Report

Managers can add goals for direct reports, which they and their employee manage outside the appraisal process.

Depending on configuration, managers may have rights to add employee goals by importing goals from the Goals library, or from other users such as managers, your manager's direct reports, and your past goals. Managers may also have rights to enter information in the fields on the screen, to create a goal from scratch.

To add a goal for a direct report:

1. Click **My Employees** » **My Employees**.
2. For the employee whose goal you want to add, select **Goals** from the Action menu.
3. Click **Create Employee Goal**.
4. Click on a link in the Import section to use an existing goal as a template for your goal, or skip to step 5 to create a goal from scratch. If you import a goal, you can edit any of the details you import in the next step.
5. Enter information in the following fields:

Option	Description
Goal Name	Enter a name for the goal.
Goal Score Type	Select a score type, such as **No Score** or **Percentage Complete**.
Description	Enter a short description of the goal.
Start Date	Select the date you want the employee to begin progress toward meeting this goal.
Target Date	Select the date you expect the employee to complete the goal.
Related Goal	Click **Browse** to link this goal to another goal, perhaps one with the same larger strategic objective.
Private	Click to mark the goal private, which hides it from users who are not directly involved with any appraisal the goal may be linked with at a

Option	Description
	later date. Scores and ratings are always private, regardless of this option.

6. Click **Submit** to save the goal.

Edit an Employee Goal

Depending on permissions, managers and administrators can modify details of an existing goal.

Only managers and administrators have access to edit a goal. Managers can edit goals for their direct reports, but not goals they created themselves. Administrators can edit any goal.

To edit an employee goal:

1. Click **My Employees** » **My Employees**.
2. On the My Employees page, for the employee whose goal you want to edit, click **Goals**.
3. Click the **Edit** icon in the Action column.
4. Update information in the following fields:

Option	Description
Goal Name	Edit the goal name.
Description	Modify the description.
Start Date	Select a new start date.
Target Date	Select a date for the goal to be accomplished.
Private	Change the privacy setting for the goal. 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.

5. Click **Submit** to save changes.
6. Click the **View All** button to return to the Goal screen, click one of the **More Options** to change the status, retire the goal or delete th goal, or click **Edit** and return to step 4 to make additional changes to the goal.

Goal Score Types

The Goal Score Type has five values from which to choose.

- **No Score**: The goal is used only for tracking purposes and has no effect on appraisal scoring.
- **Scale**: The goal is measured based on the scale used in the appraisal.
- **Percentage Complete**: The goal is measured based on progress toward 100% completion.
- **Numerical**: The goal is measured based on a numerical target, such as a sales quota.
- **Complete/Incomplete**: The goal is either completed in its entirety or not at all. This type of scoring is suited to a task-based activity.

Employee Goals Notifications

There are five types of notifications associated with the Continuous Goal Management feature.

This section describes the following notifications and the triggers which initiate the notifications:

- **Goal Created Notification**: Sent when a goal is created. The link within the notification opens the goal on the Employee Goals screen.
- **Goal Status Update Notification**: Sent when a goal's status changes. The link in the email opens the goal in Employee Goals.
- **Goal Edited Notification**: Sent when changes have been made to a goal. The link within the notification opens the goal on the Employee Goals screen.
- **Goal Deleted Notification**: Sent when a goal is deleted.
- **Retired Goal Restored Notification**: Sent when a retired goal is restored.

View Employee Goal Screen

View the details of an employee goal, such as the goal name, the score type and description.

Contents

Field	Description
Employee	The name of the employee associated with the goal.
Goal Name	A name that clearly identifies the goal.
Goal Score Type	An indication of how goal completion will be measured. Examples include No score and Percentage Complete.
Description	A short description of the goal.

Field	Description
Appraisals	If the goal is linked to an appraisal, the appraisal name displays. Click the name to open the appraisal.
Start Date	The date progress toward goal completion begins.
Target Date	The anticipated date of goal completion.
Related Goal	If a goal has been linked to this goal, the goal name displays. You can click the goal name and select a different goal, or click Browse to select a goal to link.
Private	**Yes** indicates the goal is visible only to the employee and, if the goal is attached to an appraisal, all parties involved in the appraisal process. **No** indicates the goal and description is visible to all employees with access to goals. Scores and ratings, however are always private.
View All	Click this button at the top of the screen to return to the Employee Goals screen. Note that if you were directed to this screen from a Continuous Feedback session, clicking **View All** returns you to the Goals tab within the session, where you can view all goals related to the session.
Edit	Click this button at the top of the screen to modify details of the goal.
More Options	Click this button at the top of the screen to do one of the following: **Change the Status**, **Retire the Goal**, or **Delete the Goal**.

Browse Goals Screen

Use the Browse Goals screen to review a list of employees in your organization and, if you have the necessary security permissions, see employees' goals for the current appraisal period.

Goals can have a **Public** or **Private** setting, with the default being **Public**. Only public goals display on the Browse Goals screen.

The employees are listed in alphabetical order by last name then first name.

- If an employee name has + next to it, this means that the employee has direct reports. Click + to see the names of the direct reports.
- If an employee name has an asterisk next to it, this means that the employee has goals set for the current appraisal period. Click on the employee name to see information about each goal, including the goal description, how the goal was assigned to the employee, the goal score type, the start date for the goal, and the target completion date for the goal

My 360s Screen

Use the My 360s screen to participate in a 360 degree assessment of an employee, in which raters from inside and outside of an employee's organization contribute to a performance appraisal.

These raters may be peers, superiors, direct reports, customers, or others.

A manager or administrator sets up the workflow for a 360 degree appraisal, and selects:

- The employee groups or individual employees who will be appraised.
- The raters who will participate.
- The employee competencies and skills that raters will be asked to evaluate.

Raters receive an email asking them to participate.

Depending on how the appraisal workflow is set up, you may enter a scale rating or a percentage, select a rating from a drop-down list, or enter scores in another way. Entering a comment may be mandatory or optional.

Display the My 360s Screen

Access the My 360s Screen on the Performance menu.

To display the My 360s screen:

Click **Performance** » **My 360s**.

Contents of the My 360s Screen

The My 360s screen has the following parts.

Sections

Section	Description
Appraisal Tasks	This section lists any 360 degree appraisal-related tasks that are awaiting your attention. Click any blue hyperlink (for example, **Score this Appraisal**) to go to the corresponding task and complete it.
Active Appraisals	This section lists all 360 degree appraisals that have not been completed and closed. These are appraisals that rate you, not your direct reports.
Finished Appraisals	This section lists all 360 degree appraisals of you that have ever been done.

Rate a 360 Appraisal

Follow these steps to rate a 360 Appraisal.

To rate a 360 degree appraisal:

1. Click **Performance** » **My 360s**.
2. On the My 360s screen, in the **Appraisal Tasks** section, click **Score this Appraisal** next to an appraisal name.
3. Select a rating and enter a comment for each item.

   > **Note:** Select a score to see a rating tip, which can help you determine if the rating is appropriate.

4. Click **Submit**.

Create 360s Screen

Create a 360 assessment for employees.

Display the Create 360s Screen

Access the Create 360s screen on the My Employees screen.

To display the Create 360s screen:

1. Click **My Employees** » **My Employees**.
2. Find the employee for whom you want to create a 360 assessment and on the Actions menu , click **Create New 360 Assessment**.

Contents of the Create 360s Screen

Enter information in the fields and columns on each step of the 360 assessment creation process.

Contents

The process for creating a 360 assessment is a multi-step "wizard" process. The number of steps to be taken is defined by which source option you selected: Best Fit Workflow, Choose Workflow, or Start From Scratch.

Create 360s Identification Step

Managers enter general details of the 360 assessment, such as the name of the assessment.

Identification Step

Field	Description
Name	Enter a descriptive name, which will be displayed to an employee and to any participants when the 360 assessment is created. 360s can be submitted to participants outside of the organization, so you may want to avoid company-specific terminology.
Scale	Select the scale to use to assess the employee.
Allow Employees to Nominate Participants	Select this option to enable employees to suggest other participants for the 360 assessment. The manager will make the final determination on which nominated participants are included.
Buttons	Click one of the following buttons to move through the wizard ▪ **Previous**: Return to the previous step. ▪ **Next**: Move to the next step. ▪ **Cancel**: Cancel the creation of the 360 assessment.

Create 360s Categories Step

Select categories to determine what competency and skill content items are displayed on the Content step.

Note: The process for creating a 360 assessment is a multi-step "wizard" process. Your process may not include this step. The number of steps to be taken is defined by which source option you selected: Best Fit Workflow, Choose Workflow, or Start From Scratch.

Categories Step

A 360 assessment can have unlimited categories. The categories selected determine what competency and skill content items are displayed on the Content step.

Column	Description
Available Items	A list of all categories that can be added to the assessment. To select a category, click the ✚ add icon.
Selected Items	When you have selected a category, it displays in this column. To remove it from the list of selected categories, click the ✖ delete icon. After you have removed a category, you will need to adjust the weights for the 360 assessment so they add up to "100".

Column	Description
Selected Items Column Buttons	Use the buttons in the Selected Items to equalize the weight of the categories selected, or normalize the weight to 100. ▪ **Equalize Weights**: Click to evenly distribute the weight value amongst the selected categories, to bring the total of the weights to "100.00". For example, if you have four categories in the table for the 360 assessment, each category will have a weight of "25.00". ▪ **Normalize Weights to 100**: Click to normalize the weights to 100. The numeric weight values for those categories will bring the total weight to "100.00", but maintain the weight ratio you chose. For example, if you have four categories and typed "15", "40", "30", and "50" for the weights, the weights will update to "11.11", "29.63", "22.22", and "37.04" after you clicked the button to normalize the weights.
Screen Buttons	Click one of the following buttons to move through the wizard ▪ **Next**: Move to the next step. ▪ **Cancel**: Cancel the creation of the 360 assessment.

Create 360s Content Step

Select items to include based on categories selected in the prior step.

Content

The process for creating a 360 assessment is a multi-step "wizard" process. The number of steps to be taken is defined by which source option you selected: Best Fit Workflow, Choose Workflow, or Start From Scratch.

Create 360s Select Employees Step

Select employees to participate in the 360 assessment.

Select Employees Step

Column	Description
Employee Name	Click on an employee name to open their total talent profile.
Employee ID	A code ti identify the employee.
Manager	Enables employees to suggest other participants for the 360 assessment to their manager. The manager will make the final determination on which nominated participants are included.
Organizational Unit	This is a required field for Identification and its value is displayed to an employee and to any participants when the 360 assessment is created. 360s can be submitted to participants outside of the organization, so a

Column	Description
	descriptive name for the 360 may assist those individuals who are not familiar with company terminology.
Job Title	This is a required field for Identification and its value is displayed to an employee and to any participants when the 360 assessment is created. 360s can be submitted to participants outside of the organization, so a descriptive name for the 360 may assist those individuals who are not familiar with company terminology.
Location	This is a required field for Identification and its value is displayed to an employee and to any participants when the 360 assessment is created. 360s can be submitted to participants outside of the organization, so a descriptive name for the 360 may assist those individuals who are not familiar with company terminology.
Buttons	Click one of the following buttons to move through the wizard ▪ **Next**: Move to the next step. ▪ **Cancel**: Cancel the creation of the 360 assessment.

Create 360s Select 360 Participants Step

Select individuals outside your company who will participate in the 360 assessment.

Create 360s Review Step

Review the selections for the 360 degree assessment of an employee.

Continuous Feedback Screen

Managers and employees use the Continuous Feedback screen to view and create continuous feedback sessions.

Users view sessions they created when accessing the screen from the Performance menu, and managers view sessions created for their direct reports when accessing the Continuous Feedback screen via My Employees.

> **Note:** Administrators can manage sessions from the Continuous Feedback Administration screen, if the feature is enabled.

Display the Continuous Feedback Screen

Employees and managers can access Continuous Feedback sessions they created, or that were created for them on the Performance menu. Managers can also access the Continuous Feedback screen for a specific direct report on the My Employees screen.

To display the Continuous Feedback screen:

Click **Performance** » **Continuous Feedback** or click **My Employees** » **My Employees**, and then for the employee whose feedback session you want to review, click  **Continuous Feedback**.

Contents of the Continuous Feedback Screen

Use the Continuous Feedback screen to view details on scheduled feedback sessions, such as session reason and time, and to perform actions, such as adding, accepting, signing, and editing session details.

Contents

Field	Description
Subject	The reason for the feedback session. Click this link to open the Continuous Feedback Sessions screen. Managers and an employee who is the creator of a session have access to edit the session from the Continuous Feedback Sessions screen.
Manager	The manager of the selected employee.
Employee	The employee name.
Status	The state of the session request. ▪ **Pending**: This indicates the session was created but not yet accepted by the other party. ▪ **Accepted**: This indicates the other party has accepted the session. ▪ **Completed**: This indicates both parties have signed off to end the session.
Date/Time	The date and time for the session.
Progress	An indication of the progress of the task or goal that came from the session. For example, On Track or At Risk.

Actions

Options available depend on whether you are an employee accessing your Continuous Feedback sessions from the Performance menu, or a manager accessing your direct report's Continuous

Feedback sessions from the My Employees menu, or on whether you are the creator of the session.

At any time before the session is marked **Completed**, employees and managers both can write messages to the other party within a feedback session by clicking the link to a session in the Subject column and scrolling to the Notes area. Click **Reply** to respond to an existing message thread, or click **New Message** to begin a new thread.

Field	Description
Accept	: If a session has been created by another party, an **Accept** option displays in the Action menu for that session. Clicking Accept changes the Status, displayed on this screen from **Pending** to **Accepted**.
Signature	: Click this icon to sign off on this session. When both parties have signed off, the Status of the session moves to **Completed**.
Edit Session	: Click this icon to make changes to details about the session.
Delete	: If you are a manager or the creator of the session, you can click the **Delete** icon to delete the session.

Buttons

The buttons on the Continuous Feedback screen perform the following functions.

Field	Description
Create New Session	Employees and managers have access to the **Create New Session** button.

About Editing an Existing Continuous Feedback Session

The steps a user takes to edit Continuous Feedback sessions differ depending on role.

Managers, administrators, and the creator of a session have access to edit a feedback session, as do Project Team Leads and team members who created a session.

- **Administrators**: On the Continuous Feedback Administration screen, Administrators can edit sessions created by employees or managers.
- **Managers**: On the My Employees screen, Managers can edit sessions created by direct reports.
- **Employees**: On the Continuous Feedback screen accessible from the Performance menu, all employees can edit sessions that they created.
- **Project Team Leads and Team members**: On the Continuous Feedback tab of the Project Team screen for a particular project, Project Team Leads can edit sessions for team members, and team members can edit sessions they created for themselves and their Project Team Lead. .

Edit an Existing Continuous Feedback Session as a Manager or Administrator

Managers can edit an existing feedback session on the My Employees screen.

On the My Employees screen, Managers can edit sessions for their direct reports.

To edit an existing continuous feedback session as a manager:

1. Click **My Employees** » **My Employees**.
2. On the My Employees page, for the employee whose feedback session you want to edit, click **Continuous Feedback**.
3. Click the **Edit Session** icon in the Action column.
4. Modify the session details, as desired. For example, propose a new date or time, change the reason for the meeting, or upload a relevant document.
5. Enter a message to the participants in the Notes field, if desired.
6. Click **Submit** to save changes.
7. Click the **View All** button to return to the Continuous Feedback screen.

Edit a Continuous Feedback Session as the Creator

An employee can edit any feedback session he or she created on the Continuous Feedback screen, accessible from Performance.

On their Continuous Feedback screen, any employee can edit a session that he or she created.

To edit one of your feedback sessions:

1. Click **Performance** » **Continuous Feedback**.
2. Click the icon in the Action column.
3. Modify the session details, as desired. For example, propose a new date or time, change the reason for the meeting, or upload a relevant document.
4. Enter a message to the participants in the Notes field, if desired.
5. When finished with changes, click **Submit** to save changes.
6. Click the **View All** button to return to the Continuous Feedback screen.

Edit an Existing Continuous Feedback Session as a Project Team Lead/Owner/Admin

Project Team Leads, Team Owners, and Administrators can edit an existing feedback session on the Continuous Feedback tab of the Project Team screen.

On the Continuous Feedback tab of the Project Team screen, Project Team members can edit sessions they created for themselves, Project Team Leads and Team Owners can edit sessions for any team member. Administrators can edit any session.

To edit an existing continuous feedback session as a Project Team Lead/Owner/Admin:

1. Click **My Employees** » **Project Teams** or **Career Center** » **Career Development** » **Project Teams**.
2. On the Project Teams screen, in the Project Name column, click the project whose team members you want to access.
3. Click the Continuous Feedback tab.
4. Click the drop-down arrow next to the member whose session you want to edit.
5. Click the  icon in the Action column for the session you want to edit.
6. Modify the session details, as desired. For example, propose a new date or time, change the reason for the meeting, or upload a relevant document.
7. Enter a message to the participants in the Notes field, if desired.
8. Click **Submit** to save changes.
9. Click the **View All** button to return to the My Project Teams screen.

Edit a Continuous Feedback Session as a Project Team Member

Project Team members can edit sessions they created on the Continuous Feedback tab of the Project Team screen.

On the Continuous Feedback tab of the Project Team screen, Project Team members can edit sessions they created for themselves, Project Team Leads and Team Owners can edit sessions for any team member. Administrators can edit any session.

To edit an existing continuous feedback session created on a Project Team as a team member:

1. Click **Career Center** » **Career Center** » **Career Development** » **Project Teams**.
2. Click the name of the project for which you want to create a session.
3. Click the **Continuous Feedback** tab.
4. Click the  icon in the Action column.

5. Modify the session details, as desired. For example, propose a new date or time, change the reason for the meeting, or upload a relevant document.
6. Enter a message to the participants in the Notes field, if desired.
7. Click **Submit** to save changes.
8. Click the **View All** button to return to the My Project Teams screen.

Accept a Continuous Feedback Session as an Employee

When a manager initiates a continuous feedback session, the employee must accept it to move it from a status of **Pending** to **Accepted**.

Before you accept a session as an employee, a manager must initiate the session, or an administrator must initiate the session from Continuous Feedback Administration.

To accept a continuous feedback session as an employee:

1. Click **Performance** » **Continuous Feedback**.
2. On the Continuous Feedback screen, verify the details of the session and when satisfied, click the ✔**Accept** icon in the Action column to mark the session as **Accepted**.

Accept a Continuous Feedback Session as a Manager

When an employee or an administrator initiates a continuous feedback session, the manager must accept it to move it from a status of **Pending** to **Accepted**.

Before you accept a session as a manager, an employee must initiate the session, or an administrator must initiate the session from Continuous Feedback Administration.

To accept a continuous feedback session as a manager:

1. Click **My Employees** » **My Employees**.
2. On the My Employees screen, click the Performance tab.
3. For the employee whose feedback session you want to accept, click ⚙▾ **Continuous Feedback**.
4. On the Continuous Feedback screen, verify the details of the session and when satisfied, click the ✔**Accept** icon in the Action column to mark the session as **Accepted**.

Sign-off on a Continuous Feedback Session

Both an employee and a manager must sign-off on a session to mark it as **Completed**.

Note that when an employee or manager initiates a continuous feedback session, the other party must also sign off to move it from a status of **Accepted** to **Completed**.

Note that any signatures entered by a manager or employee display at the bottom of Continuous Feedback Sessions screen, in the **Signatures** section.

To sign off on a continuous feedback session:

1. Do one of the following:
   - As a manager, click **My Employees** » **My Employees**.
     On the My Employees screen, for the employee whose feedback session you want to edit, click **Continuous Feedback**.
   - As an employee, click **Performance** » **Continuous Feedback**.
2. Click the **Signature** icon in the Action column.
3. In the **Username** field, enter your username.
4. In the **Password** field, enter your password.
5. In the **Notes** field, enter a message for the other party.
6. Check the **Please confirm your signature by checking the check box provided** field.
7. Click **Submit** to sign off on this session.
   If you are the first person to sign-off, a notification is sent to you and the other party, and the other party must also sign-off. If you are the second party to sign off, the session is marked as **Completed**.

Continuous Feedback Notifications

There are five types of notifications associated with the Continuous Feedback feature.

This section describes the following notifications and the triggers which initiate the notifications:

- Session Notification
- New Message Notification
- Session Updated Notification
- Signature Notification
- Delinquent Manager Notification

The Continuous Feedback Session Notification

This notification is sent to both the employee and the manager when a session is created and when a session requires a signature.

When a Session is Created

When a manager or employee creates a session, both parties receive a Continuous Feedback Session Notification. The party who did not initiate the session must access their Continuous Feedback screen (**Performance » Continuous Feedback**) and click the **Accept** icon to accept the session and move the status of the session from Pending to Accepted. The notice is added to the DTM calendar and the notification sent includes an .ics calendar attachment, to allow employees to add the event to other calendars.

When a Session Requires a Signature

The Continuous Feedback Session Notification is also sent to both the employee and the manager when a signature is required to end a session. The party who did not initiate the signing off of the session must access their Continuous Feedback screen after they receive this notification and click the **Signature** icon to mark the session as Completed.

Sample Continuous Feedback Session Notification

This email notification contains the following details, by default:

Dear [recipient_first_name],

Please review the details of a Continuous Feedback Session for which you have been invited to participate.

[action_url]

Session Details:

Employee: [employee_full_name]

Status: [ContinuousFeedback_status]

Subject: [ContinuousFeedback_purpose]

Proposed Time: [ContinuousFeedback_date]

Notes: [ContinuousFeedback_note]

Thank you.

The Continuous Feedback Session Updated Notification

This notification is sent to both the employee and the manager when a session is updated with new information (for example when the employee adds a comment).

When a Session is Updated with New Information

When a manager or employee updates information in a session, for example by adding a comment, both that party and the other party receive a Continuous Feedback Session Updated Notification. The notice is added to the DTM calendar and the notification sent includes an .ics calendar attachment, to allow employees to add the event to other calendars.

Sample Continuous Feedback Session Updated Notification

This email notification contains the following details, by default:

Dear [recipient_first_name],

Please review the updated details and/or comments for the following Continuous Feedback session.

[action_url]

Session Details:

Employee: [employee_full_name]

Subject: [ContinuousFeedback_purpose]

Thank you.

New Continuous Feedback Message Notification

Employees and managers will receive a notification each time the other party creates a new message, modifies a message, or replies to a message saved in a session.

Continuous Feedback Signature Notification

When an employee signs-off on a session, the Continuous Feedback Signature Notification is sent to only the manager.

Sample Continuous Feedback Signature Notification

This email notification contains the following details, by default:

Dear [recipient_first_name],

A continuous feedback session has been signed. Please click on the following action link to view:

[action_url]

Session Details:

Employee: [employee_full_name]

Status: [ContinuousFeedback_status]

Subject: [ContinuousFeedback_purpose]

Proposed Time: [ContinuousFeedback_date]

Thank you.

Continuous Feedback Delinquent Manager Notification

Feedback Sessions created by a manager should be set up on a schedule determined by administrative settings.

For example, your company or department may specify that managers should schedule feedback sessions to occur with their direct reports every three months.

Based on this schedule specified in administration, a manager will receive a notification to remind him or her that a session has not yet been scheduled for a given employee within that specified time frame.

Sample Failure to Create a Feedback Session Notification

"Your continuous feedback session for (employee name) is overdue. Your last entry was completed on (mm/dd/yy)."

Create a New Continuous Feedback Session

Administrators, managers or employees can initiate a continuous feedback session for themselves or their direct reports. Administrators can also launch a session from the Continuous Feedback Administration screen.

Instructions vary slightly depending on whether you initiate the session from the Performance menu as an employee, or from the My Employee screen as a manager. Administrators can also launch a session from the Continuous Feedback Administration screen **(Administration » Performance » Continuous Feedback » Continuous Feedback Administration).**

Create a New Continuous Feedback Session for Yourself

When you create a new Continuous Feedback Session for you and your manager, you set details such as the time and date and the reason for the meeting, and attach any documents or notes relevant to the meeting.

To create a new continuous feedback session for yourself, between you and your manager:

1. Click **Performance** » **Continuous Feedback**.
2. Click **Create New Session**.
3. In the **Subject** field, enter the purpose of the session.
4. In the **Date** and **Time** fields, enter the proposed date and time for the meeting.
5. In the **Meeting Reason** field, if desired, select a reason for the feedback session from a list pre-defined by an administrator.
6. In the **Manager Discussion Points** field, view a list of possible discussion points created by an administrator.
7. In the **Notes** field, enter a message for the employee. Click **New Message** to create a one-time note, or to begin a conversation between you and the employee. All conversations and notes are saved within the session.
8. In the **Upload Attachments** field, upload documents you will use before, during, or after the session, to ensure the goals of the session are met.
9. In the **Participants** section, view the employee and manager assigned to the session.
10. In the **Select Participants by Name** section, click the **Select** button and enter key words to search for others to participate in the session, in addition to the manager and employee.
11. In the **Select Participants by Relationship** field, select additional participants for a session by their role (Level 2 Manager, Level 3 Manager, HR Business Partner, Matrix Manager), rather than individually, by name.
12. Click **Submit** to save the session and set the status to **Pending** and send a message to your manager with the details of the session.

    Your manager must accept the session from their Continuous Feedback screen to move the session to **Accepted**.

Create a New Continuous Feedback Session for Your Employee

When you create a new Continuous Feedback Session for your employee, you set details such as the time and date and the reason for the meeting, and attach any documents or notes relevant to the meeting.

To create a new continuous feedback session as a manager for your employee:

1. Click **My Employees** » **My Employees**.
2. On the My Employees page, for the employee whose feedback session you want to create, click **Continuous Feedback**.
3. Click **Create New Session**.
4. In the **Subject** field, enter the purpose of the session.
5. In the **Date** and **Time** fields, enter the proposed date and time for the meeting.
6. In the **Meeting Reason** field, if desired, select a reason for the feedback session from a list pre-defined by an administrator.
7. In the **Manager Discussion Points** field, view a list of possible discussion points created by an administrator.
8. In the **Notes** field, enter a message for the employee. Click **New Message** to create a one-time note, or to begin a conversation between you and the employee. All conversations and notes are saved within the session.
9. In the **Upload Attachments** field, upload documents you will use before, during, or after the session, to ensure the goals of the session are met.
10. In the **Participants** section, view the employee and manager assigned to the session.
11. In the **Select Participants by Name** section, click the **Select** button and enter key words to search for others to participate in the session, in addition to the manager and employee.
12. In the **Select Participants by Relationship** field, select additional participants for a session by their role (Level 2 Manager, Level 3 Manager, HR Business Partner, Matrix Manager), rather than individually, by name.
13. Click **Submit** to save the session and set the status to **Pending** and send a message to the employee with the details of the session.

    The employee must accept the session from their Continuous Feedback screen to move the session to **Accepted**.

View Continuous Feedback Session Screen

Use the View Continuous Feedback Screen to scan and review details, such as the reason for the meeting. Depending on configuration, when viewing a session in the Performance module, you may also have access to a set of post-session tabs, such as Goals and Competencies, and to actions such as Edit and Accept.

Depending on your role as the creator, manager or administrator, and whether your acceptance is required for the session, you may see an **Edit** or **Accept** button at the top of the screen. Click the **View All** button to return to the Continuous Feedback screen, or if you are an administrator accessing the tab from Continuous Feedback Administration, to return to the Continuous Feedback Administration screen.

Display the View Continuous Feedback Session Screen

Access the View Continuous Feedback Session screen on the Continuous Feedback screen or the Continuous Feedback Administration screen.

To view the Continuous Feedback Session Screen:

1. As an employee viewing your own sessions, click **Performance » Continuous Feedback**. As a manager viewing direct reports' sessions, click **My Employees » My Employees**, click the Performance tab, and select Continuous Feedback from the Action menu. As an administrator managing all employee sessions, click **Administration » Performance » Continuous Feedback » Continuous Feedback Administration**.
2. Click the name of the session in the **Subject** column, or on the session row on the Continuous Feedback Administration screen.
   View and edit session details on the Continuous Feedback Session screen.

Contents of the View Continuous Feedback Session Screen

Use the View Continuous Feedback Screen to scan and review details, such as the reason for the meeting.

After a Continuous Feedback session has been created, users associated with the session can view the details.

Information such as meeting reason, date/time, and participants display on the screen. Depending on configuration, when viewing a session from the Performance module, one or more of the following tabs may also display:

- Goals
- Development
- Career Path
- Competencies
- Skills
- Recognition

An administrator configures which tabs are visible on the Features screen, by enabling the Continuous Feedback Tab Topics feature (Performance » Continuous Feedback » Continuous Feedback Tap Topics), for a given group, such as Managers, and selecting the tabs to display. These tabs do not display when viewing a session created for a Project Team.

Contents of the Continuous Feedback Session Career Path Tab

Managers use this tab to add a new Career Path, or to update jobs on the employee's Career Path, based on Continuous Feedback discussions. Employees, depending on permissions, can request a job be added to their Career Path, view pending Career Path jobs, or add a position to their Career Development Plan.

Available actions depend on the logged in user's permissions.

Contents

Field	Description
Career Path	This is the Active Career Path for the employee participating in the session. Hover on the link to view details such as Job Code and Career Level. Click on the link to view additional details on the Career Path detail screen.
Manage Career Paths	This button displays on the Career Path tab of a Continuous Feedback Session. When an employee participating in the session clicks this button, the My Career Path screen displays. When the manager participating in a session clicks this button, the Career Path screen for the employee participating in the session displays.
View/Hide Details	Click to expand or hide details about jobs on the Career Path, such as the position name, potential, number of months in the position, purpose, skills or training required to develop the employee's performance in the position. Actions available for this position may include Gap Analysis, Edit and Delete.

Actions ⋮

Field	Description
+Add [Jobs] to Career Path	Click this option to open the Career Path Search screen where you select options to search for jobs to add to a career path. If you are an employee, your manager must approve any additions that you make before they become a part of your Career Path.
Add to Development Plan	Managers and employees with the Add Development Plan for Self option configured can click this option to open the Development Plan Items dialog. The Development Plan associated with the Career Path is filled in by default. Enter information in the dialog, such as training course or other activity you want to add to the plan to address any deficiencies in your Competencies or Skill level that would prevent you from moving to the next job on your Career Path. When finished, click **Save**.
View Gap Analysis for Ultimate Job	Click this icon to see a gap analysis comparing the current skills and competencies of the employee participating in the Continuous Feedback Session to the skills and competencies required to do the job.

Field	Description
View Pending Career Path Jobs	Click this icon to see all of the jobs that the employee has requested to be added to a Career Path, but that have not yet been approved by the manager.
Delete (Career Path)	A Manager clicks this option to delete the Career Path for the selected employee.

Contents of the Continuous Feedback Session Competencies Tab

Managers and employees with proper permissions can score and add competencies on the Competencies tab of a Continuous Feedback session.

Contents

When an employee adds a competency, it must be approved by a Manager before displaying in the table on this tab.

Field	Description
Competency Name	This column lists the name of all competencies gained by the employee, or added but awaiting approval. For example, Accountability.
Category	This is the name of the competency category to which the competency belongs.
Source	This indicates how the competency was earned. For example, a competency may be earned via an Appraisal, by passing a Course, or through a manager's approval of a Competency self-nominated through the employee's Total Talent Profile.
Score	This is a ratio that indicates the rating earned for this Competency (for example, 5/5 for the Decision Making Competency indicates the highest rating: Identifies and considers all workable alternatives before making decisions).
Approved Date	This is the date the Competency was approved (for example, through the Appraisal process or as part of passing a Course).
View/Hide Details	Click View Details to expand the text description defined for the Score. For example the Decision Making Competency's rating description for a score of 5/5 might be, "Identifies and considers all workable alternatives before making decisions." Click Hide Details to hide the short description.

Actions

Actions available depend on permissions.

Field	Description
Manage Competencies	Click to display the Competency Profile screen. Depending on your permissions, on this screen you can view, add, score, and delete

Field	Description
	competencies gained for the employee participating in the Continuous Feedback session.
Edit	Click this icon to edit the competency name, category and description.
Approve	If the Approved Date has a status of Awaiting approval, you can click **Approve** here to approve the Competency.
Reject	If the Approved Date has a status of Awaiting approval, a Manager can click **Reject** here to reject the Competency.
Withdraw	Click this option to withdraw the approval for a competency.

Contents of the Continuous Feedback Session Development Tab

Managers and employees use this tab to add a new Development Plan for the employee associated with the session. The creator of any development plans displayed on the tab also has access to other Actions, such as editing, copying and deleting the plan.

Contents

Field	Description
Created By	This is the name of the user who created the development plan.
Plan Name	This is the name that the plan creator gave the plan (for example, Observation and Feedback Skills). Click this name to see details about the plan, including all of the courses and other activities in the plan.
Completion	This is a percentage representing how much of the plan you have completed to date, as determined by the number of plan items that you have completed. If you add a new item to the development plan, the overall completion percentage may change.
Plan Type	This is the reason for the development plan: ▪ **Gap Fill**: This type of plan addresses the need of an employee who requires additional development to fulfill his or her potential within an organization. The development plan will fill gaps in the employee's knowledge. ▪ **Growth:** This type of plan addresses the need of an employee who is ready to move into another position, but lacks certain abilities or knowledge. The development plan will expand the employee's knowledge base.
Start Date	This is the date on which you are supposed to begin performing the tasks in the development plan.

Field	Description
Target Date	This is the date on which you are supposed to finish performing the tasks in the development plan.
Status	This is your progress in accomplishing the plan: Not Started, Started, In Progress, Overdue, or Completed.

Action

Field	Description
Add Development Plan	Click this button to create a new development plan for yourself if you are the employee associated with the session, or for your direct report, if you are the manager associated with the session.
Activate/ Deactivate/Cannot Update Own Plan	Click this icon to activate or deactivate a development plan. An open lock means that the development plan is active and the employee is expected to complete it. A closed lock means that it is inactive and the employee is not expected to complete it. You cannot add new items to an inactive plan. Employee's can only deactivate plans created by the employee. Only an employee's manager can deactivate an employee's plan. No plan with a **Status** of **Completed** can be deactivated.
Print	Click this icon to print a copy of the development plan.
New Plan Item	Click this icon to add a training course or other activity to the development plan to address any deficiencies in the employee's competencies or skill level that would prevent the employee from moving to the next job in the active career path.
Edit	Managers and the employee who created the plan can click this icon to edit the Plan Name, Plan Type, Start Date, or End Date for the plan.
Copy	Click this icon to apply this development plan to any of your direct reports. You can also choose to apply only some elements of the plan to your direct reports. This option is not available for your own plan.
Delete	Managers and the employee who created the plan can click this icon to delete the development plan.

Contents of the Continuous Feedback Session Goals Tab

Managers and employees use this tab to create employee goals. Managers can also edit goals, change the status of a goal, retire a goal and delete a goal. Employees can also change a goal's status on this tab.

Contents

Field	Description
Goal Name	Click the goal name to view details about the goal.
Progress	A numeric score indicating the employee's progress on the goal.
Start Date	The date the goal was set.
Target Date	The date of anticipated goal completion.
Completion Date	The actual date the goal was completed.
Status	Status of the goal from a set of pre-defined values such as Not Started or At Risk.

Actions

Field	Description
Create Employee Goal	Employees and managers can add goals for themselves or their direct reports by clicking the Create Employee Goal button.
Edit icon	Managers and the employee who created the goal can click the Edit icon to open the Edit Employee Goal screen, where they can modify goal details.
Change Status icon	Employees and managers can change the status of a goal. On the Actions menu, click the Change Status icon to open the Change Status dialog. Modify the values in the Start Date, Target Date, Completion Date and Goal Status field, as desired. The Goal Status drop-down contains a set of pre-defined values to choose from, such as Not Started or At Risk. When finished, click **Submit**.
Retire Goal icon	Managers and the employee who created the goal can click the Retire Goal icon to retire the goal. You must confirm this action by clicking **OK**.
Delete icon	Managers and the employee who created the goal can click the Delete icon to delete the goal. You must confirm the deletion by clicking **OK**.

Contents of the Continuous Feedback Session Skills Tab

Managers and employees use this tab to add and edit skills based on discussions that come from the session.

Contents

When an employee adds a skill, it must be approved by a Manager before displaying in the table.

Field	Description
Skill Name	This column lists the names of skills earned by or pending endorsement for the employee participating in the Continuous Feedback Session.
Skill Category	This is the category to which the skill belongs. For example, Information Technology.
Skill Level	This indicates the degree of experience the employee has with this skill. For example, Intermediate or Advanced.
Skill Usage	This indicates how long the skill was used. For example 5-6 Years.
Skill Last Used	This indicates a range of time, in years, when the skill was last used. For example 0-1 years ago.
Date Added	This date indicates when the skill was earned or approved for this employee.
Date Updated	If the skill has been edited, this field indicates the date the change(s) was made.
Is Endorsed	This indicates whether or not the skill has been endorsed by the employee's manager.

Actions

Field	Description
Manage Skills	Click to display the Skills Profile screen, which displays details about the employee's earned skills, such as the level of experience, how long the skill has been in use, and the date the skill was last used by the employee. On this screen employees can submit skills to be endorsed by a manager, edit skills, and delete skills from their list. Managers can edit skills and endorse or remove endorsement of skills.
Edit	Employees can click this option on the Actions menu to edit the Skill Level, Skill Usage, and Skill Last Used fields.
Endorse	Managers can click Endorse on the Actions menu to endorse a skill that is waiting to be approved.
Reject	Managers can click Reject on the Actions menu to remove a skill from the list. The skill must have its endorsement removed before it can be rejected.

Field	Description
Remove endorsement	Managers can click Remove endorsement on the Actions menu to remove endorsement for a skill. This unapproved skill will remain in the list. To remove the skill, click Reject.

Contents of the Continuous Feedback Session Recognition Tab

Managers and employees use this tab to view details about employee recognitions received by the employee. Details include the title, the creator, and the date the recognition was created.

Contents

To see this tab, the user viewing the session must belong to a group with the Employee Recognition feature enabled.

Field	Description
Employee Recognition Title	This is the description of the recognition received by the employee. Click the title to view additional details.
Creator	This is the name of the individual who created the recognition entry.
Date	This is the date the entry was created.

Actions

Field	Description
Create Employee Recognition	Click this button to open the Create Employee Recognition screen, where you can enter information to recognize one or more employees for work well done.
Edit	The user who created the recognition can click this icon in the Action menu to edit details of the entry. Click **Submit** when finished.
Delete	The user who created the recognition can click this icon in the Action menu to remove the entry from the list.

View a Continuous Feedback Session as a Manager or Employee

View the details of a Continuous feedback session, such as the reason for the meeting.

To view details of a Continuous Feedback session as a manager or the creator of a session in the Performance module:

1. Click **Performance » Continuous Feedback**.
2. In the Subject column, click the link to the session you want to view.

View a Continuous Feedback Session from Project Teams

View the details of a feedback session created for a Project Team, such as the reason for the meeting.

To view a Continuous Feedback Session as a Project Team Lead or a team member who has created the session on the Continuous Feedback tab of the Project Teams screen:

1. Click **My Employees » Project Teams** or **Career Center » Project Teams**.
2. On the My Project Teams screen, in the **Project Name** field, click the name.
3. Click the Continuous Feedback tab.
4. Click the down arrow next to a Member name.
5. Click the link to the session you want to view.

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