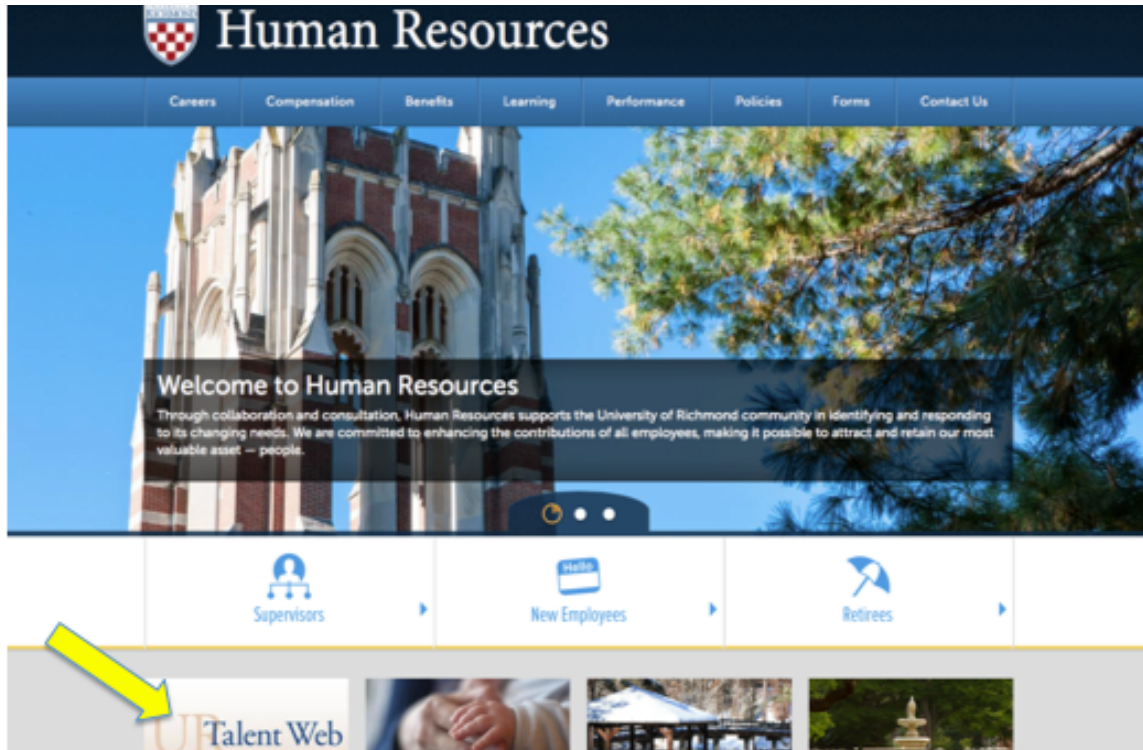




UR Talent Web - Goals



LOG IN

1. Sign in to UR Talent Web from the HR homepage (for PC users, the recommended browser is Internet Explorer) <https://richmond.csod.com/samldefault.aspx>
2. User ID is your NetID – the ID you use to log on to the University of Richmond network (i.e. sjones5)
3. Your initial password is Richmond1. After you log on the first time, you will be prompted to change your password
4. If you forget, or have forgotten your password, click on “Forgot Password?” -- you will receive an email with instructions for resetting your password
5. Please be aware if you try to logon unsuccessfully 3 times, you will be locked out of the system for 1 hour, and HR will not be able to assist you during this time.

VIEW AND CREATE GOALS FOR YOURSELF

1. How can I view goals that are already in Talent Web?

When you login to Talent Web, you will be taken directly to your "Actions" page. If you have any goals, they will be listed here along with any training events you've registered for. If you'd like to only view goals, click on the upside down triangle next to "Show All" and select "Goals" from the drop down menu.

The screenshot shows the 'Actions' page for Audrey Coulbourn. The page header includes the University of Richmond logo, a search bar, and navigation links: Home, My Team, Performance, Training, Apply for Jobs, Admin, Recruit, Connect. The user's profile is visible on the left. The main content area is titled 'Actions' and features a 'Goals' dropdown menu and a 'By Due Date' dropdown. Below these are four goal entries under the 'Due Later' filter:

- Goals: People Leadership (Due: 5/31/2016, Status: In Progress)
- Goals: Live the Values (Due: 5/31/2016, Status: In Progress)
- Goals: Talent Acquisition (Due: 5/31/2016, Status: In Progress)
- Goals: HR Communications (Due: 5/31/2016, Status: In Progress)

An orange callout bubble points to the 'Goals' dropdown menu with the text: "Click the triangle and choose 'Goals' from the drop down menu to view goals only".

2. How do I create my goals?

Talk to your supervisor to gain agreement on your performance expectations for the next year. Click on "Create Goals" in the drop down box under "Options" in the upper right hand corner of the Actions page. **This will take you directly to the page to create a new goal.**

This screenshot is similar to the first one, but the 'Options' dropdown menu is open, showing two options: "Create Goals" and "View All Goals". An orange callout bubble points to the 'Options' dropdown with the text: "Click the triangle and choose 'Create Goals' from the drop down menu".

Write a SMART Goal:

1. Write the title of the goal, for example “Customer Service”
2. In the Goal Statement section, write the specific measurable goal. For example, “Provide outstanding customer service to all students, parents, and colleagues”.
3. You can update the dates by clicking on the calendar icon next to the start date and due dates.
4. Add specific measurable tasks by clicking on the “Add Tasks” button. For example, “Receive 98% satisfaction ratings on customer surveys” or “Respond to all customer requests within 48 hours”. If you add tasks, be sure to include the due dates using the calendar icon and click “Done”.
5. If you would like to add an attachment, click on the “Choose File” button under the word “Attachments” and follow the prompts to upload a document from your files.
6. When you have finished writing the goal, click “Submit”.
7. **Your new goals will not appear in your Actions list until your Supervisor has approved them.**

The screenshot shows a web form for creating a SMART goal. It includes a title field, a rich text editor for the goal statement, date pickers for start and due dates, a task list, an attachment section, and a submit button. Three callout boxes provide instructions: one for updating dates, one for adding tasks, and one for uploading attachments. The submit button is circled in red.

Title *
Be a great people manager.

Goal Statement
Uphold UR policies and employment laws.
Develop and coach employees.
Build a high performing team.

Start Date 6/1/2016 **Due Date *** 5/31/2017

Tasks
Description: Attend Supervisor Essentials training
Start Date: 6/8/2016 Due Date: 6/9/2016

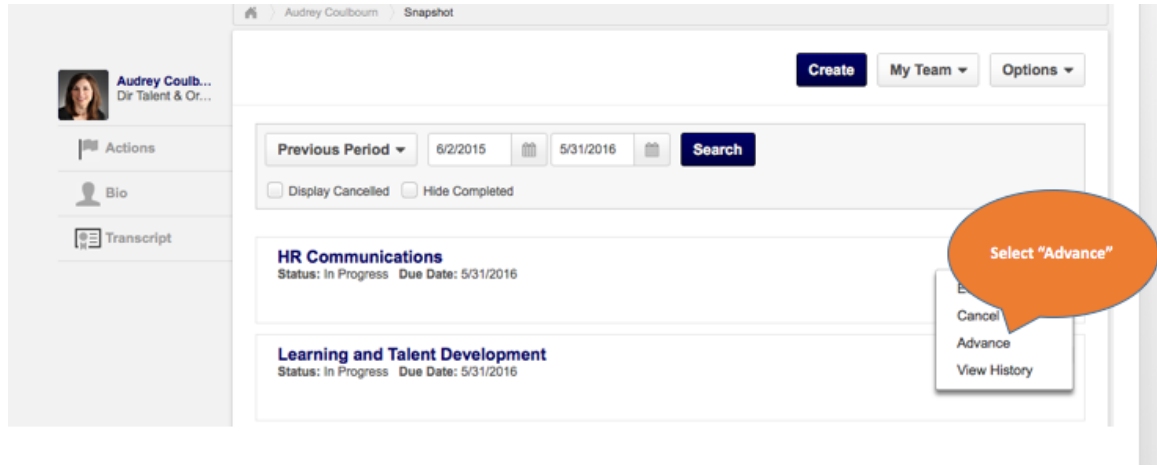
Attachments
URTW_Self Evaluation.docx 723.34 KB

Buttons: Cancel, Save as Draft, **Submit**

Callouts:
- Update goal dates by clicking on the calendar icon and selecting new dates
- Add specific tasks, choose due dates, and click "Done" when finished
- Click "Choose File" to upload an attachment from your files

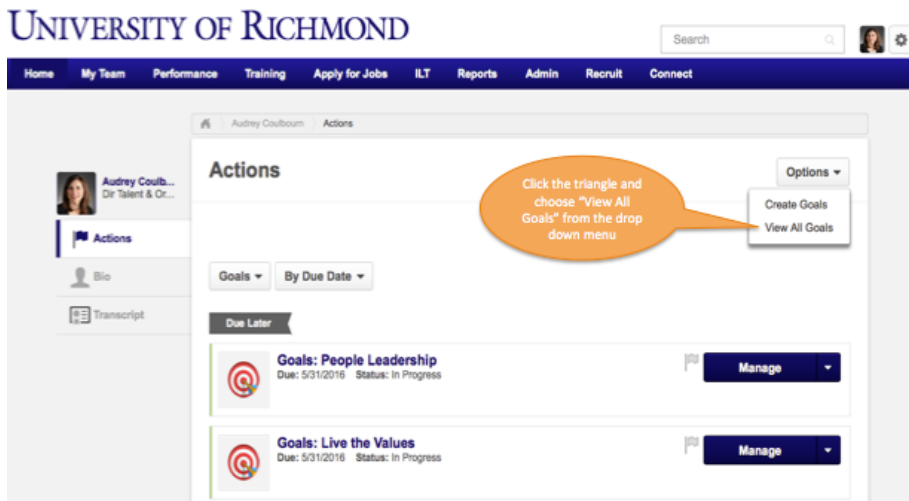
3. How can I advance a goal from last year?

From your Actions page, click on “Options” in the upper right hand corner. Select “View All Goals”. Click on “Current Period” in the left hand corner. Select “Previous Period”. Find the goal you would like to advance to this year. Click on the upside down triangle to the right and select “Advance”. The goal will display on the next screen and you can edit from that page.



4. How can I request that my supervisor approve my goals?

Once the goal has been submitted, you will immediately be taken back to your “Actions” page. Click on the “Options” triangle and choose “View All Goals” from the drop down menu.



You will be taken to a page that lists all your goals. Any new goals that have not been approved will show as “Pending Approval”. Click “Send Approval Request”, which will send an automated email to your supervisor so that the goals can be approved. Once approved, the goal will show as “Approved”.

My Goals

Create

Options ▾

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Experts assert that goals assigned to employees should be directly aligned with the goals from the strategic and business plans of the organization. Many organizations further refine those goals by doing various task and job analysis to identify what competencies (knowledge, skills and abilities) are needed by the employee to achieve the goals. The results of those activities often are itemized in job descriptions.

My Goals Team Goals Hierarchy

Current Period ▾

6/1/2015

5/31/2016

Search

Display Cancelled

Hide

Your new goal will show "pending approval" until your supervisor approves the goal

Click "Send Approval Request" to send an email to your supervisor to approve goals

Send Approval Request

My Goals

Customer Service

Status: Pending Approval Due Date: 5/31/2016



HR Communications

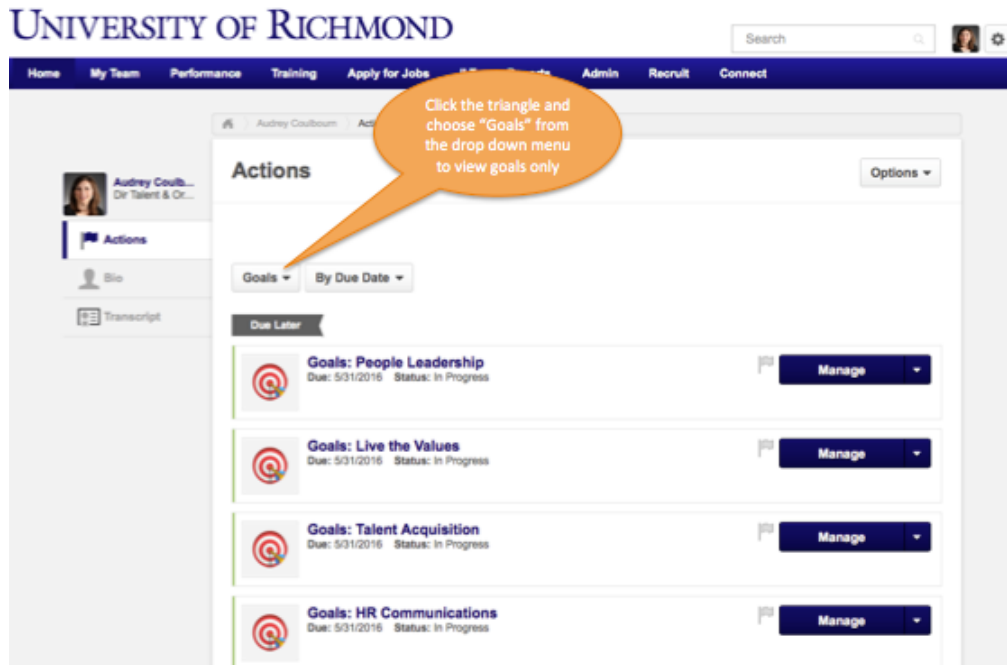
Status: In Progress Due Date: 5/31/2016



CHANGE, ADD COMMENTS, AND PRINT GOALS

1. How can I make changes to a goal?

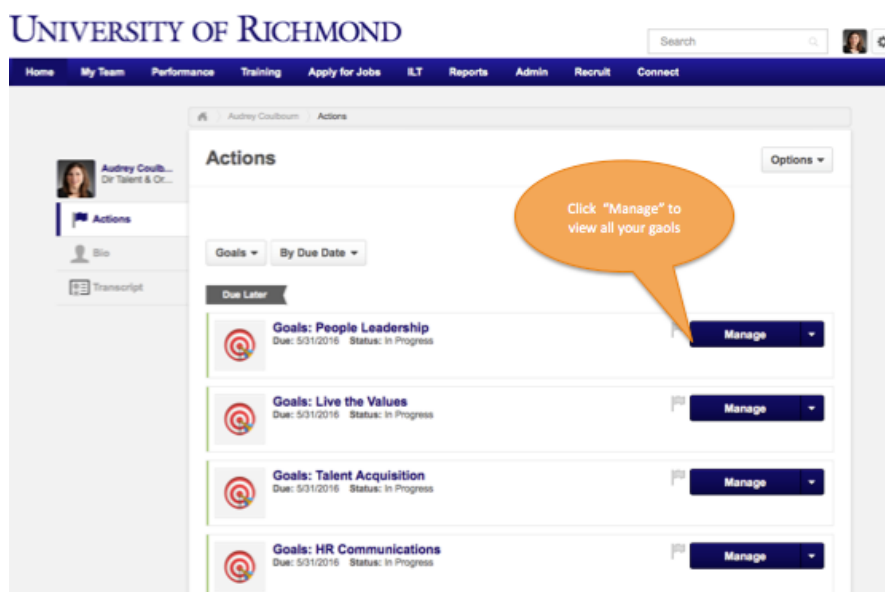
Once you login, you will be taken directly to your “Actions” page. If you have any goals, they will be listed here along with any training events you’ve registered for. If you’d like to only view goals, click on the upside down triangle next to “Show All” and select “Goals” from the drop down menu.



The screenshot shows the University of Richmond's Actions page. The user is Audrey Coulbourn. The page has a navigation bar with links: Home, My Team, Performance, Training, Apply for Jobs, Reports, Admin, Recruit, Connect. The main content area is titled "Actions" and includes a search bar and a user profile picture. Below the title, there are two dropdown menus: "Goals" and "By Due Date". A callout bubble points to the "Goals" dropdown menu with the text: "Click the triangle and choose 'Goals' from the drop down menu to view goals only". Below the dropdowns, there is a "Due Later" filter. The main list contains four goal entries, each with a target icon, title, due date, status, and a "Manage" button:

Goal Title	Due Date	Status
Goals: People Leadership	5/31/2016	In Progress
Goals: Live the Values	5/31/2016	In Progress
Goals: Talent Acquisition	5/31/2016	In Progress
Goals: HR Communications	5/31/2016	In Progress

Find the goal you’d like to update, and click on “Manage”. You will be taken to your “Goals” page and the specific goal you would like to update.



This screenshot is identical to the previous one, but with a callout bubble pointing to the "Manage" button of the first goal entry. The callout bubble contains the text: "Click 'Manage' to view all your goals".

Click on the inverted triangle and choose "Edit" from the drop down menu.

My Goals Create Options ▾

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My Goals Team Goals Hierarchy

Current Period ▾ 6/1/2015 5/31/2016 Search

Display Cancelled Hide Completed

Send Approval Request

My Goals

Customer Service
Status: Pending Approval Due Date: 5/31/2016

HR Communications
Status: In Progress Due Date: 5/31/2016

Learning and Talent Development
Status: In Progress Due Date: 5/31/2016

Click the triangle and choose "Edit" from the drop down menu

- Edit
- Copy
- Cancel
- View History

From this page, you can change the title of the goal, change the description in the text box, change start and due dates, edit or delete a task, add a task, add an attachment, and add comments.

Title *
HR Communications

Goal Statement

B I S U [Icons]

Build a credible HR brand through marketing and clear communications.

Start Date: 6/1/2015 Due Date *: 5/31/2016

Update goal start and due dates by clicking on the calendar icon and selecting new dates

Tasks

Description: Plan and execute communications for major HR initiatives - Open enrollment - Annual performance management processes - Employee service awards - Wellness programs Start Date: 6/1/2015 Due Date: 5/31/2016

Click "Choose File" to upload an attachment from your files

Add Tasks

Attachments

Choose File

Upload up to 3 attachments. Maximum upload 1mb

Comments

Add Comment

Add a new task, choose due dates, and click "Done" when finished

Cancel Submit

Once you've made all your changes, be sure to click "Submit" at the bottom of the page. Your supervisor will need to approve the updated goal in order for you to see it on your "Actions" list when you login (see question #3 above for instructions on how to send an approval request).

2. How can I delete a goal?

When you login to Talent Web, you will be taken directly to your "Actions" page. If you have any goals, they will be listed here along with any training events you've registered for. If you'd like to only view goals, click on the upside down triangle and select "Goals" from the drop down menu. Click on "Create Goals" in the drop down box under "Options" in the upper right hand corner of the Actions page. This will take you directly to your "Goals" page.

From your goals page, find the goal you'd like to delete. Click on the inverted triangle and choose "Cancel" from the drop down menu.

My Goals Create Options ▾

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My Goals Team Goals Hierarchy

Current Period ▾ 6/1/2015 5/31/2016 Search

Display Cancelled Hide Completed

Send Approval Request

My Goals

Customer Service Status: Pending Approval Due Date: 5/31/2016	▾ >
HR Communications Status: In Progress Due Date: 5/31/2016	▾
Learning and Talent Development Status: In Progress Due Date: 5/31/2016	

Click the triangle and choose "Cancel" from the drop down menu

- Edit
- Copy
- Cancel
- View History

3. How can I print a copy of my goals?

Click on "Options" in the upper right hand corner of your "Goals" page. Choose "Download PDF-My Goals" from the drop down menu.

My Goals

Create

Options ▾

Download PDF - My Goals

Organizations try to manage the performance of each employee, team and process and even of the organization itself. The performance management process is very similar, regardless of where it is applied. Information in this module describes the general performance management process starting with using performance goals. Experts assert that goals assigned to employees should be directly aligned with the goals from the strategic and business plans of the organization. Many organizations further refine those goals by doing various task and job analysis to identify what competencies (knowledge, skills and abilities) are needed by the employee to achieve the goals. The results of those activities often are itemized in job descriptions.

My Goals Team Goals Hierarchy

Current Period ▾ 6/1/2015 5/31/2016 Search

Display Cancelled Hide Completed



My Goals

- HR Communications**
Status: In Progress Due Date: 5/31/2016
- Learning and Talent Development**
Status: In Progress Due Date: 5/31/2016

A PDF document of your goals will display. Click "File" then "Print" in your computer toolbar.

Goal Details:

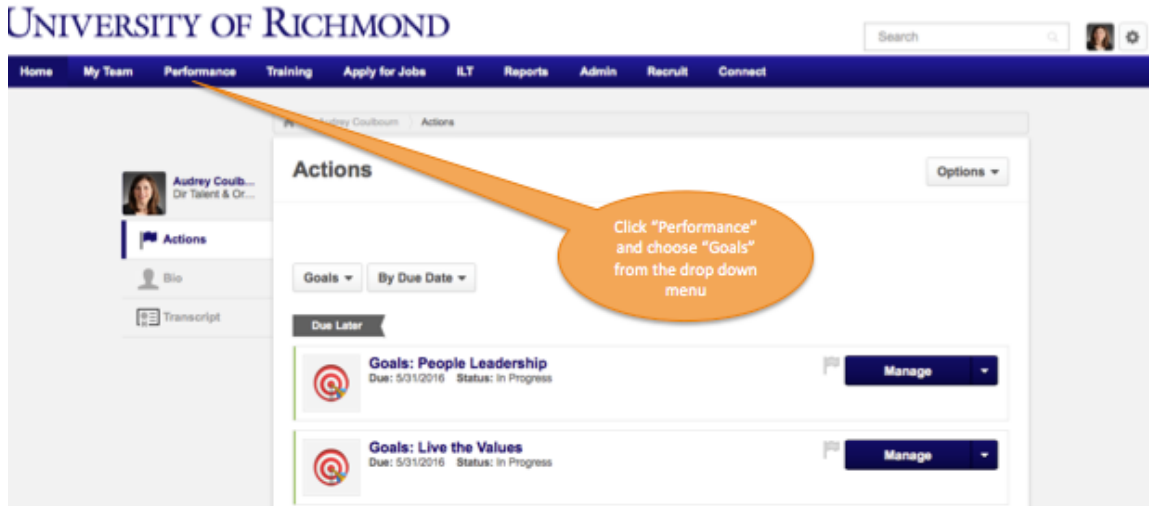
HR Communications	
Goal Owner:	Coulbourn, Audrey
Goal Statement	Build a credible HR brand through marketing and clear communications.
Status:	In Progress
Start Date:	6/1/2015
Due Date:	5/31/2016
Tasks:	Plan and execute communications for major HR initiatives: - Open enrollment - Annual performance management processes - Employee service awards - Wellness programs Start Date: 6/1/2015 Due Date: 5/31/2016
Tasks:	Use all available channels to communicate why UR is a great place to work: - Publish employee feature stories - Launch an employee "newsletter" - Market benefits and events - Leverage TVs as marketing channels Start Date: 6/1/2015 Due Date: 5/31/2016
Tasks:	Redesign and launch the HR website: - Work with University Communications to build the architecture and design - Partner with HR staff to move, update, and create content in the new design - Create a communications plan to help people navigate the new site - Use the site to help build and external and internal employment brand Start Date: 6/1/2015 Due Date: 10/1/2015
Tasks:	Communicate the results of the Great Colleges to Work for survey Start Date: 6/1/2015 Due Date: 12/31/2015
Tasks:	Build a recognized external employment brand Start Date: 6/1/2015 Due Date: 5/31/2016

Learning and Talent Development	
Goal Owner:	Coulbourn, Audrey
Goal Statement	Deliver valuable learning and development programs and solutions.
Status:	In Progress
Start Date:	6/1/2015
Due Date:	5/31/2016
Tasks:	Offer ongoing professional development for employees: - Gather employee training needs through a formal assessment - Launch and market bundled courses based on relevant needs/topics - Course success measured by participant evaluations Start Date: 6/1/2015 Due Date: 5/31/2016
Tasks:	Deliver Compliance Training: - Train employees on Title IX and Harassment as recommended by OCR - Track and report Title IX and FERPA participation - Integrate United Educators compliance training into UR Talent Web-market offerings Start Date: 6/1/2015 Due Date: 5/31/2016
Tasks:	Enhance revised New Employee Onboarding program: - Launch a new employee partner program - Make program updates based on feedback Start Date: 6/1/2015 Due Date: 5/31/2016

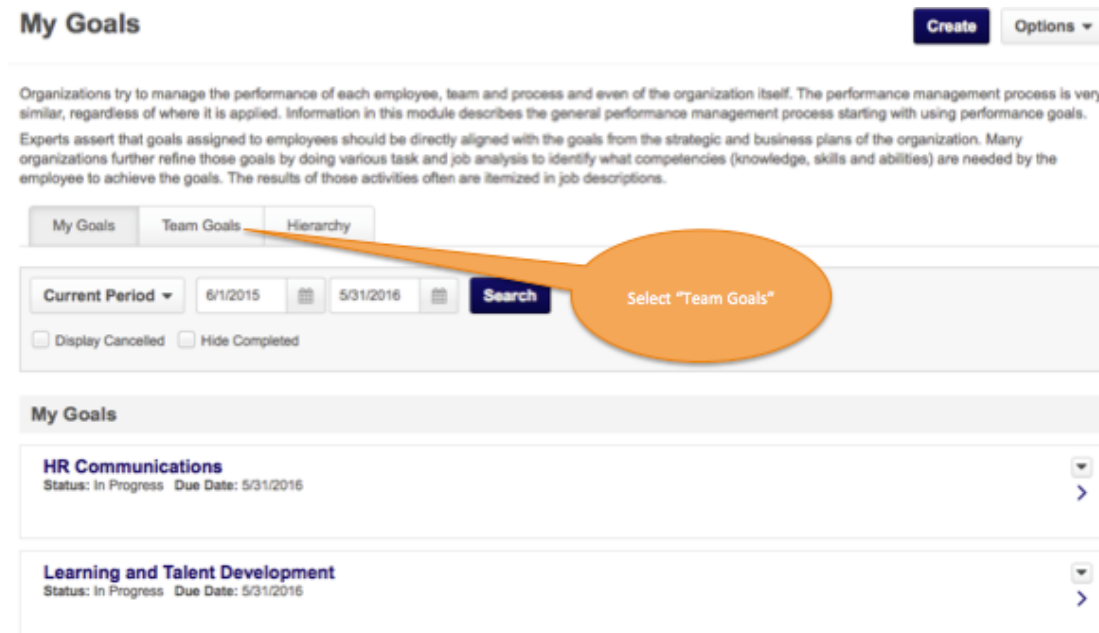
GOALS FOR YOUR EMPLOYEES

1. How can I view my team's and an employee's goals?

When you login, you will be on your "Actions" page. Click "Performance" in the menu across the top of the page. Select "Goals" from the drop down menu.



Click "Team Goals".



A list of your direct reports will be displayed. If an employee has goals in the system, there will be a triangle on the right side of the screen. Click the triangle.

Team Goals

Create

Options ▾

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Experts assert that goals assigned to employees should be directly aligned with the goals from the strategic and business plans of the organization. Many organizations further refine those goals by doing various task and job analysis to identify what competencies (knowledge, skills and abilities) are needed by the employee to achieve the goals. The results of those activities often are itemized in job descriptions.

My Goals Team Goals Hierarchy

Current Period ▾ 6/1/2015 5/31/2016 Search

Display Cancelled Hide Completed

All Statuses ▾

Allison Norden
HR - Floater

Ann Vazquez
HR - Floater

Aubrey Pettaway
Learning & Dev Specialist III

Brittney Rusch
HR - Floater

Click the triangle to view the employee's goals

A list of the employee's goals will be displayed. Click on each goal to view the comments, tasks, and/or attachments. If you'd like to edit a goal (add a task, attachment or comment), click on the inverted triangle, and choose "Edit" from the drop down menu.

My Goals Team Goals Hierarchy

Current Period ▾ 6/1/2015 5/31/2016 Search

Display Cancelled Hide Completed

All Statuses ▾

Allison Norden
HR - Floater

Ann Vazquez
HR - Floater

Aubrey Pettaway
Learning & Dev Specialist III

Development: u
Status: Approved Due Date: 5/31/2016

Learning Services Expectations: u
Status: Approved Due Date: 5/31/2016

Onboarding & Supervisor Training Expectations: u

Status: Approved Due Date: 5/31/2016

Click the triangle to edit, copy, delete, or view the goal history.

- Edit
- Copy
- Cancel
- View History

2. How can I print an employee's goals?

Choose an employee from your team goals page. Click on the triangle to the right of the page (as above). Click "Options" in the upper right hand corner of the page and choose "Download PDF" from the drop down menu.

Team Goals Create Options ▾

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My Goals **Team Goals** Hierarchy

Current Period: 6/1/2015 - 5/31/2016 Search

Display Cancelled Hide Completed

All Statuses ▾

Allison Norden
HR - Floater

Ann Vazquez
HR - Floater

Aubrey Pettaway
Learning & Dev Specialist III

Development:
Status: Approved Due Date: 5/31/2016

Learning Services Expectations:
Status: Approved Due Date: 5/31/2016

Click "Options" and choose "Download PDF-My Goals"

The PDF document will display. Go to your computer menu bar and choose "File", then "Print".

Goal Details:

Development:	
Goal Owner:	Pettaway, Aubrey
Goal Statement	<p>A. Maintain SHRM SPHR certification.</p> <p>B. Facilitate sessions of the Spring 2016 Osher Lifelong Learning Institute's "Great Decisions" discussions</p> <p>C. Attend appropriate Center for Teaching, Learning and Technology instructional sessions as well as take advantage of other options to improve technology skills.</p>
Status:	Approved
Start Date:	6/1/2015
Due Date:	5/31/2016

Learning Services Expectations:	
Goal Owner:	Pettaway, Aubrey
Goal Statement	<p>A. Deliver current course catalog and newly introduced courses which should achieve overall course participant ratings of at least 3.5 on a 4.0 scale across their first three offerings. Use UR Talent Web to manage course rosters, course completions, approvals, marketing etc.</p> <p>B. Customize, design and/or redesign courses/ facilitations which should achieve overall participant ratings of at least 3.5 on a 4.0 scale for a) relevance to the learner's needs and b) preparing learners to deal with issues they face at work.</p> <p>C. Support increases in course registration/ attendance and follow-through as well as incorporation of online training into course delivery and collaborations with subject matter experts. Work with HR Communications Specialist and HRIS Analyst, respectively, to develop marketing approaches (e.g., learning certificate programs) and appropriate metrics and reports.</p>
Status:	Approved
Start Date:	6/1/2015
Due Date:	5/31/2016

3. How can I assign a goal to an employee or to my team?

Go to your “Goals” page. Click “Create” in the upper right hand corner of the screen.

My Goals Create Options ▾

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My Goals Team Goals Hierarchy

Current Period ▾ 6/1/2015 5/31/2016 Search

Display Cancelled Hide Completed

My Goals

HR Communications
Status: In Progress Due Date: 5/31/2016

Learning and Talent Development
Status: In Progress Due Date: 5/31/2016

Write the title of the new goal and include information in the “goal statement” that describes the goal. Click the assign to “Your Team” radio button at the bottom of the page.

Create Goals

Enter details or import using the SMART Wizard or copy goal from previous goal period. Adjust dates to the current goal period.

Title *
My Team Goal

Goal Statement
Achieve 98% customer satisfaction ratings.

Start Date 6/1/2015 Due Date * 5/31/2016

Tasks
Add Tasks

Attachments
Choose File







Assignment *
Select which employee should be assigned this goal.
 Yourself Your team Custom Assignment

Cancel Save as Draft Submit

Write the title and goal statements.

Click assign to "Your Team"

Place a checkmark next to each employee whom you'd like to assign the goal. Click "submit" at the bottom of the page.


<input checked="" type="checkbox"/>	 Aubrey Pettaway	Learning & Dev Specialist III
<input checked="" type="checkbox"/>	 Cheryl Poston	Talent Acquisition Specialist
<input checked="" type="checkbox"/>	 Judy Price	HR - Floater
<input type="checkbox"/>	 Linda Pugh	HR - Floater
<input type="checkbox"/>	 Britzney Rusch	HR - Floater
<input type="checkbox"/>	 Ann Vasquez	HR - Floater

Options

Create a separate goal for each user.

Dynamic Assignment

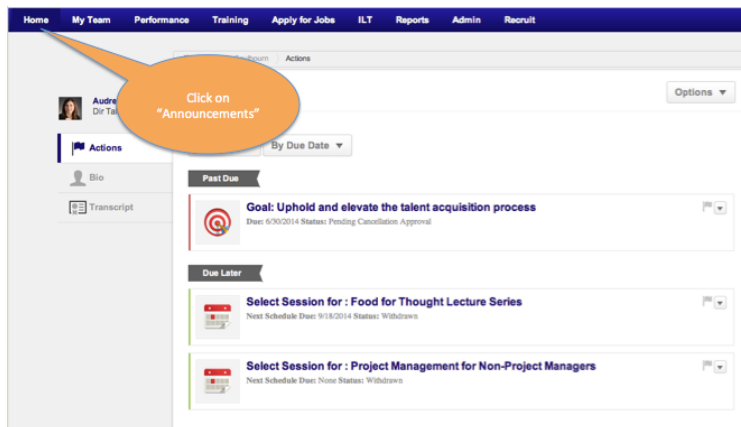
Cancel Save as Draft **Submit**



Click the box to assign the goal to each employee

4. How do I approve goals?

Click on "Home" in the upper left hand corner of the screen. Select "Announcements" from the drop down menu. If you have goals to approve, you will have a message in your "inbox" to approve the goals. Click "Approve Goals".



Home My Team Performance Training Apply for Jobs ILT Reports Admin Recruit

Click on "Announcements"

Options

By Due Date

Past Due

Goal: Uphold and elevate the talent acquisition process
Due: 6/30/2014 Status: Pending Cancellation Approval

Due Later

Select Session for : Food for Thought Lecture Series
Next Schedule Date: 9/18/2014 Status: Withdrawn

Select Session for : Project Management for Non-Project Managers
Next Schedule Date: None Status: Withdrawn