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](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.
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.

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.
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.
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.

   ![Image of a webpage showing how to advance a goal](image1.png)

   ![Image of a webpage showing how to request supervisor approval](image2.png)

   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”.

   ![Image of a webpage showing how to request supervisor approval](image3.png)
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.
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.

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

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.
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.

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

### Goal Details:

#### HR Communications

**Goal Owner:** Coulomb, Audrey  
**Goal Statement:** Build a credible HR brand through marketing and clear communications.

<table>
<thead>
<tr>
<th>Status</th>
<th>Start Date</th>
<th>Due Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>In Progress</td>
<td>6/1/2015</td>
<td>5/31/2016</td>
</tr>
</tbody>
</table>

**Tasks:**
- Plan and execute communications for major HR initiatives: - Open enrolment - Annual performance management processes - Employees services awards - Wellness programs
  - Start Date: 6/1/2015  
  - Due Date: 5/31/2016

- Use all available channels to communicate why UPR is a great place to work: - Publish employee feature stories - Launch an employee newsletter - Market benefits and events - Leverage TV's as marketing channels
  - Start Date: 6/1/2015  
  - Due Date: 5/31/2016

- Redesign and launch the HR website: - Work with University Communications to build the architecture and design - Partner with HR staff to move, update, and enable 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

- Communicate the results of the Great Colleges to Work survey
  - Start Date: 6/1/2015  
  - Due Date: 12/31/2015

- Build a recognized external employment brand
  - Start Date: 6/1/2015  
  - Due Date: 5/31/2016

#### Learning and Talent Development

**Goal Owner:** Coulomb, Audrey  
**Goal Statement:** Deliver valuable learning and development programs and solutions.

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<td>In Progress</td>
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</table>

**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 - Courses success measured by participant evaluations
  - Start Date: 6/1/2015  
  - Due Date: 5/31/2016

- Deliver Compliance Training: - Train employees at Title (I) and harassment as recommended by OCR - Track and report Title (I) and IIPVA participation - Ensures United States compliance training into UK Talent Web-market offerings
  - Start Date: 6/1/2015  
  - Due Date: 5/31/2016

- Enhance revised New Employees Onboarding program: - Launch a new employee partner program - Make program updates based on feedback
  - Start Date: 6/1/2015  
  - Due Date: 5/31/2016
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”.

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**GOALS FOR YOUR EMPLOYEES**

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![Image showing the process of viewing team and employee goals](image-url)
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.

<table>
<thead>
<tr>
<th>Name</th>
<th>Position</th>
</tr>
</thead>
<tbody>
<tr>
<td>Allison Norden</td>
<td>HR - Floater</td>
</tr>
<tr>
<td>Ann Vazquez</td>
<td>HR - Floater</td>
</tr>
<tr>
<td>Aubrey Pettaway</td>
<td>Learning &amp; Dev Specialist III</td>
</tr>
<tr>
<td>Britney Rusch</td>
<td>HR - Floater</td>
</tr>
</tbody>
</table>

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.
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.

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

![Image of team goals page with instructions for printing employee's goals]
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.

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

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”.