

GroSum

Quick Guide

Goal Setting by Employee

1. Employee logs into PMS & goes to dashboard

Sign In

You have successfully signed out.

5

•

Where do you want to start from today?

My Tasks

? Forgot Password

Login



Login into PMS

Go to Dashboard

Review 2017-18 ▾

Change Review Cycle

Dashboard

My Tasks

All Reviews

My Reports

Home

Ron Weasley ▾

Review for the period: 01 Apr 2017 - 31 Mar 2018

Goals

I need to set my goals

Go

My Manager is waiting for my signoff

Done

Appraisal (Due by 01 Mar 2017)

★★★★☆

My Review

Awaiting Goals Sign Off

Links

2. Under Goal Settings, Employee sees a red link – I need to set my goals – GO
3. Employee clicks the link to set goals.


Clicks link
to set goals

Review 2017-18 ▼ Ron Weasley ▼

Dashboard

Review for the period: 01 Apr 2017 - 31 Mar 2018

Goal Settings (Due by 31 Mar 2018)



My Goals

I need to set my goals **Go**

My Manager is waiting for my signoff

Done

Appraisal (Due by 01 Mar 2017)

★★★★☆ My Review

Awaiting Goals Sign Off

Links

- Target icon
- Calendar icon
- Document icon
- File icon
- First aid kit icon

4. In the Goal Setting screen, if no goals are set yet, a window automatically opens and shows a list of goals that employee can choose from.
5. Employee can select a goal & set a weightage for each goal and click SAVE.

Select a goal &
set a weightage

Review 2017-18 ▾ Set My goals for Reviewer: Mary ▾ View History Ron Weasley ▾

0.0 % - Competencies (0.0 %)

Instructions Choose Add New

Choose Goals

Library | Current goals ✕

For Reviewer: Mary ▾

Goal	Competencies	
Financial (1 Assessment Areas Checked)		
50%		
✓ Support marketing team in efforts towards brand creation	50	%
Internal Process (1 Assessment Areas Checked)		
50%		
✓ Review meeting with all stakeholders	50	%
✓ Organise SI Testing Review meeting with all stakeholders	0	%
✓ Maintaining Hand-over documents up-to-date	0	%
✓ Adhere to company policies	0	%
✓ Face Internal and External Quality Audits	0	%
✓ Provide technical inputs to Documentation team for revision of manuals	0	%

Save

Save Sign Off Click Sign Off to finalize Performance Measures for the Review

Click on SAVE

6. The screen refreshes and shows the goals with weightages that employee has added from goal library
7. The employee can add details in the text boxes for the goals and SAVE

Add details in the
text boxes

The screenshot shows a performance review interface for the 2017-18 review period. The reviewer is Mary, and the reviewee is Ron Weasley. The interface displays two goals with their respective weightages and objective measure text boxes. The first goal is 'Support marketing team in efforts towards brand creation' with a weightage of 50.0% and a category of Financial. The second goal is 'Review meeting with all stakeholders' with a weightage of 50.0% and a category of Internal Process. Both goals have an 'Objective Measure' text box. A red box highlights the 'Objective Measure' text box for the first goal, and a red arrow points to it from the text 'Add details in the text boxes'. At the bottom of the interface, there is a 'Save' button, which is also highlighted by a red box and a red arrow from the text 'Click on SAVE'.

Review 2017-18 ▼ Set My goals for Reviewer: Mary View History Ron Weasley ▼

Showing Goal (50.0 %) - Competencies (50.0 %) Instructions Choose Add New

Support marketing team in efforts towards brand creation Financial 50.0 %

Objective Measure:

Review meeting with all stakeholders Internal Process Target 50.0 50.0 %

Objective Measure:

Save Sign Off Click Sign Off to finalize Performance Measures for the Review

Click on SAVE

8. If an employee wants to create a new goal, not currently available in library, the button ADD NEW can be clicked that will open a new window to create a goal.

Click on
Add New

The screenshot displays a performance review interface for 'Review 2017-18'. The header includes the reviewer's name 'Mary' and a 'View History' link. Below the header, there are tabs for 'Goal (50.0 %)' and 'Competencies (50.0 %)', along with buttons for 'Instructions', 'Choose', 'Add New' (highlighted with a red box and an arrow), and a download icon. The main content area lists two goals:

- Support marketing team in efforts towards brand creation**: Categorized as 'Financial' with a value of '50.0 %'. It includes an 'Objective Measure' text input field.
- Review meeting with all stakeholders**: Categorized as 'Internal Process' with a 'Target' of '50.0' and a value of '50.0 %'. It also includes an 'Objective Measure' text input field.

At the bottom, there are 'Save' and 'Sign Off' buttons, with a note: 'Click Sign Off to finalize Performance Measures for the Review'. A vertical sidebar on the right contains icons for 'Links', a target, a calendar, a list, a document, and a first aid kit.

9. Employee can add the goal & if there is a similar goal present in the library, the tool provides auto suggestions to select one of those rather than create a new goal.
10. If employee selects a suggestion, then that goal is added for the employee & shown on the screen after the screen is refreshed.
11. If employee chooses to create a new goal, then the goal is created and also added for the employee & shown on the screen after the screen is refreshed. Further this goal can be edited to make further changes by the employee.

Add the
New goal

Add targets for
measurable

Review 2017-18 ▾ Set My goals for Reviewer: Mary ▾ View History Ron Weasley ▾

Showing Goal (50.0%) - Competencies

Support marketing team in efforts to

Objective Measure:

Review meeting with all stakeholders

Objective Measure:

Add/Edit New Goals

Goal | Competencies

Can't find goals from the library? Create your specific goals here.

Type: Measurable 100

Perspective: Customer

Goal: Revenue Management

Objective Measure:

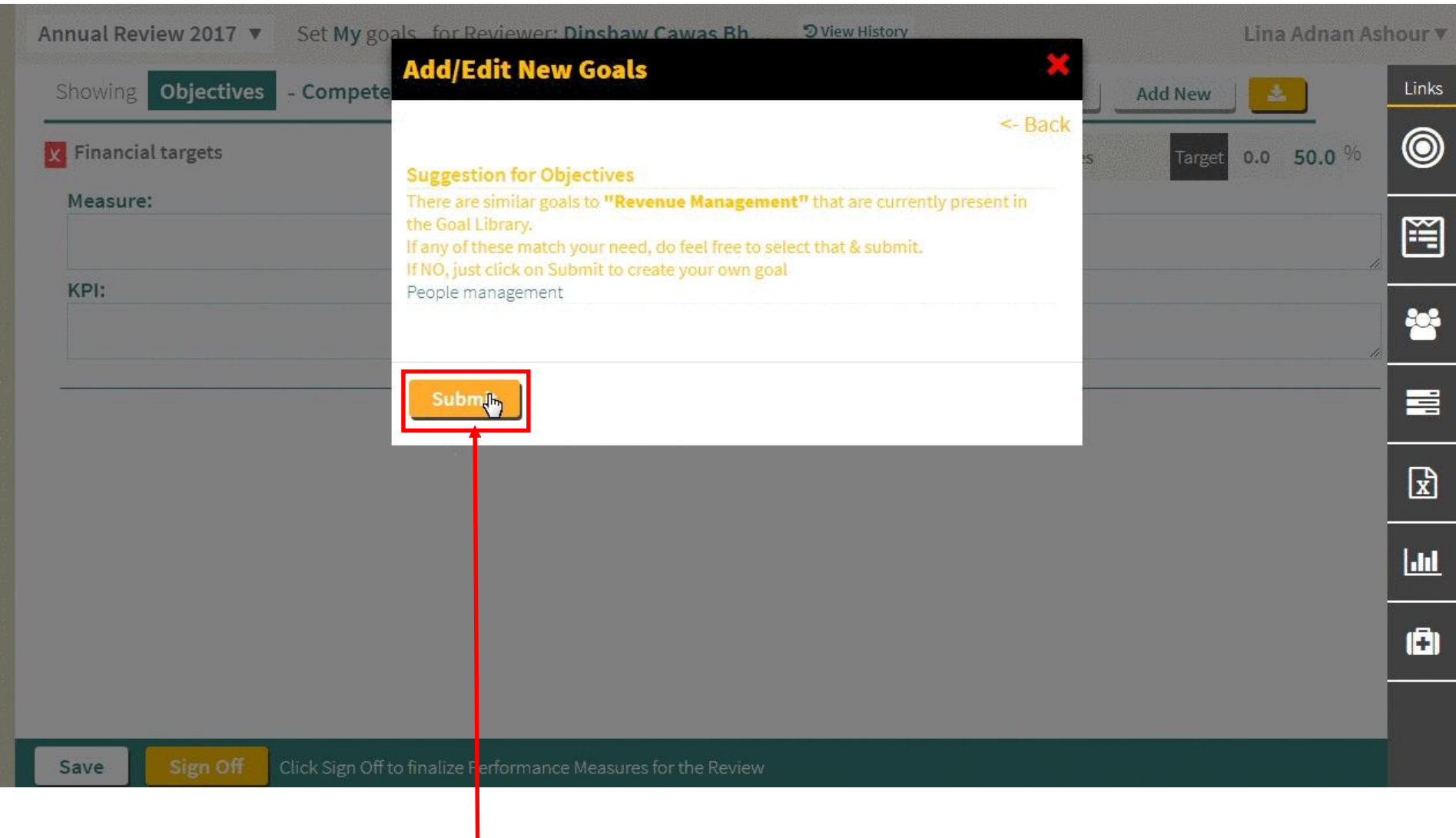
☒ For ☒ Mary

Next

Save Sign Off Click Sign Off to finalize Performance Measures for the Review

Click on NEXT

12. Once done, the employee can click SUBMIT to complete the goal setting process. No further changes can be done by the employee.



Click on SUBMIT

13. Email alert is sent to Reviewer that employee has submitted the goals and now, Appraiser can review.

Review 2017-18 ▾

Set My goals for Reviewer: Mary

View History

Ron Weasley ▾

Showing Goal (50.0 %) - Competencies (50.0 %)

InstructionsChooseAdd New

✕

Revenue Management

Customer

25 %

Objective Measure:

✕

Support marketing team in efforts towards brand creation

Financial

25.0 %

Objective Measure:

✕

Review meeting with all stakeholders

Internal Process

Target

50.0

50.0 %

Objective Measure:

Save

Sign Off

Click Sign Off to finalize Performance Measures for the Review

Click on Sing Off

GroSum

You are an Expert Now

