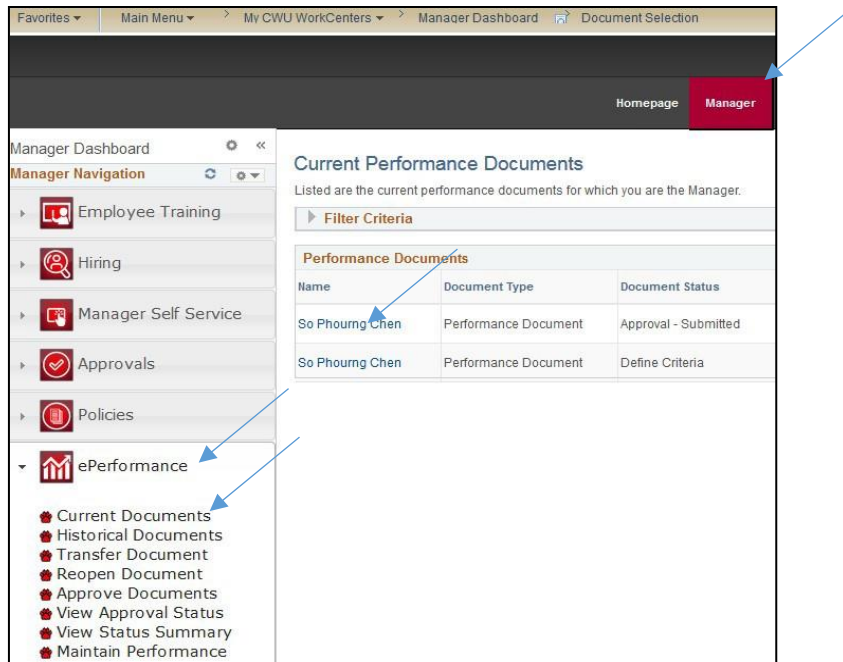


ePerformance – Copying a Goal from Another Team Member’s Document

1. Open the document you want to update.

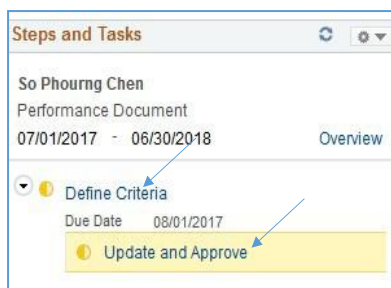
MyCWU > Manager tab > ePerformance folder > Current Documents > Click on the name of the employee



The screenshot shows the MyCWU Manager Dashboard. On the left is a 'Manager Navigation' sidebar with a tree view. The 'ePerformance' folder is expanded, showing sub-items: 'Current Documents', 'Historical Documents', 'Transfer Document', 'Reopen Document', 'Approve Documents', 'View Approval Status', 'View Status Summary', and 'Maintain Performance'. Blue arrows point from the 'Current Documents' item to the 'Current Performance Documents' table on the right. The table has columns for 'Name', 'Document Type', and 'Document Status'. Two rows are visible, both for 'So Phourng Chen'. The first row has a status of 'Approval - Submitted', and the second row has a status of 'Define Criteria'. Another blue arrow points to the 'Define Criteria' status in the second row.

| Name | Document Type | Document Status |
|-----------------|----------------------|----------------------|
| So Phourng Chen | Performance Document | Approval - Submitted |
| So Phourng Chen | Performance Document | Define Criteria |

2. Click on **Define Criteria** and then on **Update and Approve**:



The screenshot shows a 'Steps and Tasks' window for a performance document. The document is for 'So Phourng Chen' and covers the period '07/01/2017 - 06/30/2018'. There are two tasks listed: 'Define Criteria' with a due date of '08/01/2017' and 'Update and Approve'. Blue arrows point to the 'Define Criteria' task and the 'Update and Approve' button.

3. Click on the **Goals** tab and then on **Add Goal**.

The screenshot shows a navigation menu with tabs for 'Mission', 'Dept Objectives', 'Goals', 'Competencies', and 'Train'. The 'Goals' tab is active. Below the menu, there is a section titled 'Section 3 - Employee Goals' with the text 'Employee Goals will be evaluated by: Employee, Manager'. An 'Add Goal' button with a green plus icon is visible, and a blue arrow points to it. At the bottom, there is an 'Audit History' section.

4. Under Add Goal, click on **Copy Goal from My Team’s Documents**, and then click **Next**.

The screenshot shows the 'Add Goal' dialog box. It has a title 'Performance Document' and a subtitle 'Add Goal'. The instruction says 'Select an option to add the new goal.' There are four radio button options: 'Add pre-defined goal', 'Add your own goal', 'Copy goal from My Document', and 'Copy Goal from My Team's Documents'. The last option is selected. Below the options is a 'Next' button (highlighted with a blue arrow) and a 'Return' link.

5. Click on **Select** next to the document you want to copy *from*.

The screenshot shows the 'Select a Document' dialog box. It has a title 'Select a Document' and a subtitle 'Below is a list of documents you own. Select the document you want to copy items from.' There is a 'Filter Criteria' section with fields for 'First Name', 'Last Name', 'Document Type', 'Document Status', and 'Period Between'. Below the filter section are 'Filter' and 'Clear' buttons. At the bottom, there is a table of 'Performance Documents' with columns for 'Select', 'Name', 'Document Type', 'Document Status', 'Period Begin', and 'Period End'. The first row shows a document for 'So Phourng Chen' with a 'Select' button highlighted.

| Select | Name | Document Type | Document Status | Period Begin | Period End |
|--------|-----------------|----------------------|----------------------|--------------|------------|
| Select | So Phourng Chen | Performance Document | Approval - Submitted | 02/16/2018 | 06/30/2018 |

NOTE: You may need to enter criteria in the “Filter Criteria” section in order to select the document(s) you want to copy from. For example, if you want to copy from a Completed document from a previous performance cycle, you would enter the appropriate date information in the **Filter Criteria** section:

Period Between: 07/01/2019 – 10/31/2020
Document Status = blank
 and then click **Filter**.

The document(s) should be listed with a **Select** button.

6. Click the **Select** button next to the document you want to copy *from*.
7. Click the **checkbox** next to each goal you want to copy, and then click **Copy**.

| Employee Goals to be copied | | Status | Percent C |
|-------------------------------------|--------|--------|-----------|
| <input checked="" type="checkbox"/> | Goal 1 | | 5 |

8. You should see the goal you copied in your document.