

ePerformance – Copying a Goal from another team members’s document

1. Open the document you want to update.

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

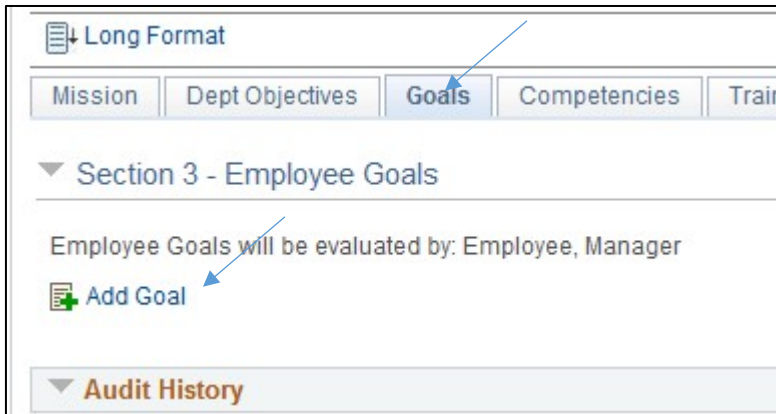
The screenshot shows the MyCWU Manager Dashboard. The top navigation bar includes 'Homepage' and 'Manager'. The left sidebar contains 'Manager Navigation' with categories like Employee Training, Hiring, Manager Self Service, Approvals, Policies, and ePerformance. The ePerformance section is expanded, showing options: Current Documents, Historical Documents, Transfer Document, Reopen Document, Approve Documents, View Approval Status, View Status Summary, and Maintain Performance. The main content area is titled 'Current Performance Documents' and lists documents for the manager. A table shows two documents for 'So Phourng Chen': one with status 'Approval - Submitted' and one with status 'Define Criteria'. Blue arrows point to the 'Manager' tab, the 'ePerformance' menu item, and the 'Define Criteria' document in the table.

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:

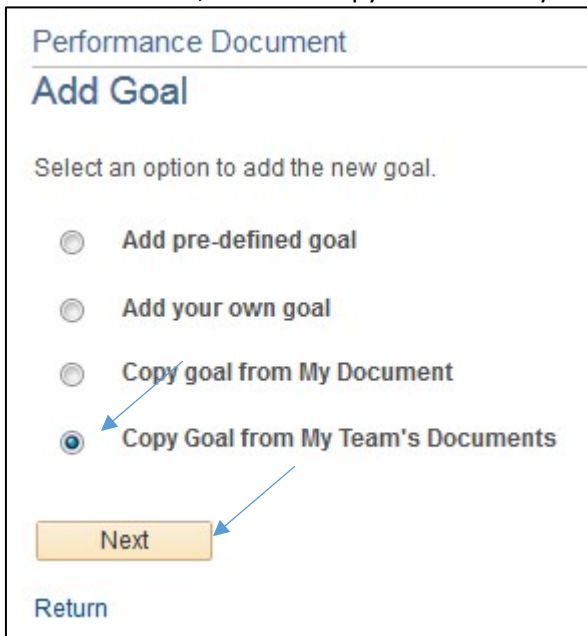
The screenshot shows a 'Steps and Tasks' window for a performance document. The document is for 'So Phourng Chen' and covers the period '07/01/2017 - 06/30/2018'. There is an 'Overview' link. Below this, a task 'Define Criteria' is listed with a due date of '08/01/2017'. A yellow button labeled 'Update and Approve' is highlighted. 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 web interface with a top navigation bar containing tabs for 'Mission', 'Dept Objectives', 'Goals', 'Competencies', and 'Train'. The 'Goals' tab is selected and highlighted in blue. Below the navigation bar, there is a section titled 'Section 3 - Employee Goals'. Under this section, it says 'Employee Goals will be evaluated by: Employee, Manager'. Below this text is a button labeled 'Add Goal' with a green plus icon. At the bottom of the section, there is a collapsed 'Audit History' section.

4. Under Add Goal, click on “Copy Goal from MyTeam’s Documents” and click Next.



The screenshot shows a dialog box titled 'Performance Document' with a sub-header 'Add Goal'. The main text says 'Select an option to add the new goal.' Below this text 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 'Copy Goal from My Team's Documents' option is selected, indicated by a filled radio button. Below the options is a yellow 'Next' button. At the bottom left, there is a 'Return' link.

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

Select a Document

Below is a list of documents you own. Select the document you want to copy items from.

Filter Criteria

First Name Last Name

Document Type Document Status

Period Between -

Performance Documents Personalize | Find | | First 1 of 1 Last

Select	Name	Document Type	Document Status	Period Begin	Period End
<input type="button" value="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 FY2017, you would enter the following in the Filter Criteria section: Period Between: 07/01/2016 – 06/30/2017

Document Status = blank

and then click Filter.

Performance Document

Select a Document

Below is a list of documents you own. Select the document you want to copy items from.

Filter Criteria

First Name Last Name

Document Type Document Status

Period Between -

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

- Click the Select button next to the document you want to copy from.

- Click the checkbox next to each goal you want to copy and click Copy.

Performance Document

Copy Goal from My Team's Documents

Select the check box next to each goal you want to add. When you are finished, select the Copy button to return to the you can save your entry.

Copy from Document

Name So Phourng Chen Document Type PERFORM

Section Goals Section Content Type GOAL

Begin Date 02/16/2018 End Date 06/30/2018

Employee Goals to be copied Personalize | Find | | First

Employee Goals	Status	Percent C
<input type="checkbox"/> Goal 1		5

Select All

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