

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

1. Open the document you want to update.

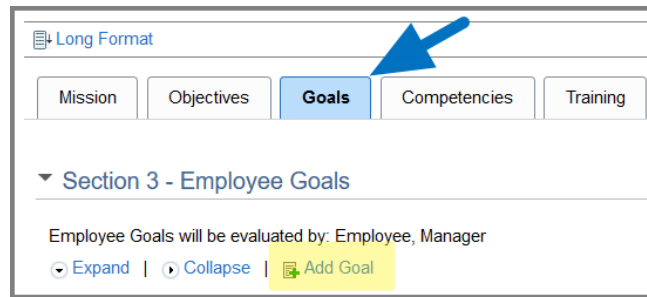
MyCWU > |Manager| tab > ePerformance folder > Current Documents > Click on the name of the employee

The screenshot shows the MyCWU Manager Dashboard. The top navigation bar includes 'Homepage', 'Manager', 'Student', 'Employee', 'Analytics', 'Faculty', and 'Time & Attendance'. The 'Manager' tab is selected. On the left, the 'ePerformance' folder is expanded, and 'Current Documents' is highlighted. A blue arrow points to the 'ePerformance' folder, and another points to 'Current Documents'. The main content area shows a table of employees with columns for Name, Job Title, and Position in Salary Range. The table lists several 'Empty Position' entries and 'Admin Six' and 'Cservice Five' entries. Below the table, there are sections for 'View My Organization', 'Headcount Analytics', 'Scheduled Training', and 'FMS Approvals'.

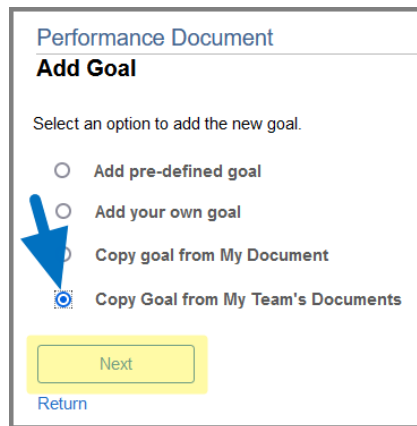
2. Click on **Define Criteria** and then on **Update and Approve**:

The screenshot shows the 'Performance Process' 'Steps and Tasks' for 'Admin Six'. The 'Performance Document' is for the period 11/01/2022 - 10/31/2023. The 'Define Criteria' step is selected, and its 'Due Date' is 01/31/2023. The 'Update and Approve' step is highlighted with a red box and a blue arrow points to it.

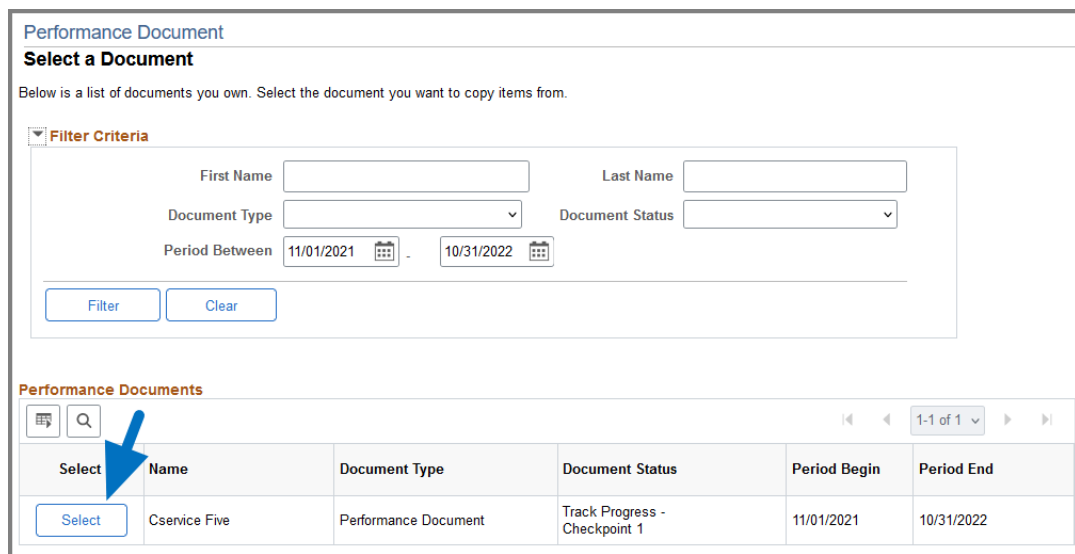
- Click on the **|Goals|** tab and then on **Add Goal**.



- Under Add Goal, click the radio button to **Copy Goal from My Team's Documents**, and then click **Next**.



- Click on **Select** next to the document you want to copy *from*. (See **** NOTE **** on next page.)



**** 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, as highlighted in the screen shot below.

Period Between: 11/01/2021 – 10/31/2022
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 11/01/2021 - 10/31/2022

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

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

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 11/01/2021 - 10/31/2022

Performance Documents

Select	Name	Document Type	Document Status	Period Begin	Period End
<input type="button" value="Select"/>	Cservice Five	Performance Document	Track Progress - Checkpoint 1	11/01/2021	10/31/2022

7. Click the **checkbox** next to each goal you want to copy, and then 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 document where you can save your entry.


Copy from Document

Name	Cservice Five	Document Type	PERFORM
Section	Goals Section	Content Type	GOAL
Begin Date	11/01/2021	End Date	10/31/2022

Employee Goals to be copied

Employee Goals	Status	Percent Complete
<input checked="" type="checkbox"/> EMCC Expansion and CWU Goal Alignment and Support		0
<input checked="" type="checkbox"/> Professional Development Goal		0

Select All Deselect All



8. You should see the goal(s) you copied in your document. If you need to edit any details about the goal (i.e. Due Date, etc.), click the *pencil icon* to the right of the goal.

Goal 2: EMCC Expansion and CWU Goal Alignment and Support

Description : Provide oversight of EMCC and develop efforts to support university-wide goals pertaining to student recruitment and retention efforts.
 *Recruitment - (Add efforts here)
 *Retention - (Add efforts here)

- Due Date : 11/30/2022
- Status: In Progress
- Percent Complete: 0

Manager Comments

Employee Comments

Created By Supervisor Two 12/06/2022 9:35AM
 Last Modified By Supervisor Two 12/14/2021 3:40PM

Goal 3: Professional Development Goal

Description : Identify and complete a personal and/or professional goal.
 *Complete Administrative Professional Certificate by 12/31/21.

- Due Date : 11/30/2022
- Status: In Progress
- Percent Complete: 0

