



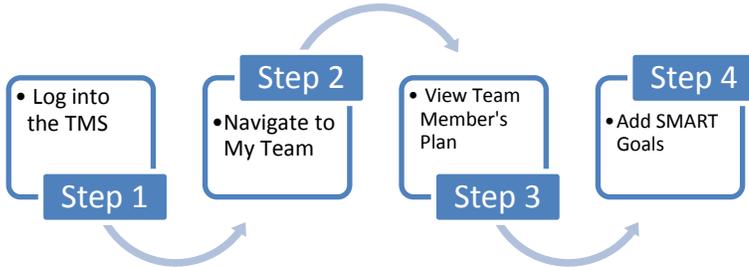
Add SMART Goal to Plan

ROLE: MANAGER

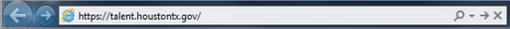
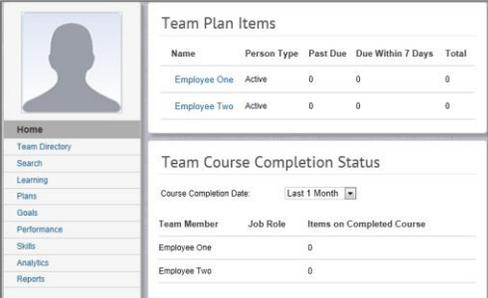
Purpose

This job aid is to guide managers through the step-by-step process of how to add SMART Goals to a plan.

Process Flow



Procedure

Step	Action
<p>1. Log into the Talent Management System (TMS)</p> <div data-bbox="232 1161 534 1339" style="border: 1px solid blue; border-radius: 15px; padding: 5px; margin: 10px 0;"> <p>1. Type your Username and Password</p> <p>2. Click Sign In</p> </div>	<ul style="list-style-type: none"> From any browser, type in https://talent.houstontx.gov.  <ul style="list-style-type: none"> The Talent Management System log in screen displays. Type in your Username and Password then click Sign In.  <ul style="list-style-type: none"> The homepage displays.
<p>2. Navigate to My Team</p> <div data-bbox="347 1745 542 1822" style="border: 1px solid blue; border-radius: 15px; padding: 5px; margin: 10px 0;"> <p>Click Plans</p> </div>	<ul style="list-style-type: none"> Click the My Team icon in the top main header. The Team Dashboard page displays.  <ul style="list-style-type: none"> In the left navigation pane, click Plans. The Plans page displays. 

Step	Action																																										
<p>3. View Team Member's Plan</p> <div data-bbox="326 390 496 516" style="border: 1px solid blue; border-radius: 10px; padding: 5px; display: inline-block; margin: 10px;"> Click the number 1 link </div> <div data-bbox="289 699 548 793" style="border: 1px solid blue; border-radius: 10px; padding: 5px; display: inline-block; margin: 10px;"> Click Plan Name </div>	<ul style="list-style-type: none"> In the Direct Team Plans, under the Draft column, click on the number 1 link next to the desired employee. <div data-bbox="639 342 1511 592" style="border: 1px solid gray; padding: 5px;"> <p>Direct Team Plans</p> <table border="1"> <thead> <tr> <th>Person Name</th> <th>Person Type</th> <th>Draft</th> <th>Pending App...</th> <th>Pending Ack...</th> <th>Activated</th> <th>Completed</th> <th>Cancelled</th> <th>Revision Requested</th> <th>Actions</th> </tr> </thead> <tbody> <tr> <td>Employee One</td> <td>Active</td> <td style="border: 2px solid red;">1</td> <td>0</td> <td>0</td> <td>0</td> <td>0</td> <td>0</td> <td>0</td> <td>Actions</td> </tr> <tr> <td>Employee Two</td> <td>Active</td> <td>0</td> <td>0</td> <td>0</td> <td>0</td> <td>0</td> <td>0</td> <td>0</td> <td></td> </tr> </tbody> </table> <p style="text-align: right;"> <input type="button" value="Activate Plan"/> <input type="button" value="Create Plan"/> <input type="button" value="Add Activity"/> <input type="button" value="Reset"/> </p> </div> <ul style="list-style-type: none"> Under the Plan Name column, click the Plan Name that is in Draft status to view the plan details. <div data-bbox="639 695 1511 842" style="border: 1px solid gray; padding: 5px;"> <table border="1"> <thead> <tr> <th>Plan Name</th> <th>Status</th> <th>Start Date</th> <th>End Date</th> <th>Plan Type</th> <th>Actions</th> </tr> </thead> <tbody> <tr> <td>2014-15 HEAR Performance Plan</td> <td style="border: 2px solid red;">Draft</td> <td>07/01/2014</td> <td>06/30/2015</td> <td>Employee</td> <td>Actions</td> </tr> </tbody> </table> <p style="text-align: right;"> <input type="button" value="Add Activity to Plan"/> <input type="button" value="Activate Plan"/> <input type="button" value="Back to Team View"/> <input type="button" value="Reset"/> </p> </div>	Person Name	Person Type	Draft	Pending App...	Pending Ack...	Activated	Completed	Cancelled	Revision Requested	Actions	Employee One	Active	1	0	0	0	0	0	0	Actions	Employee Two	Active	0	0	0	0	0	0	0		Plan Name	Status	Start Date	End Date	Plan Type	Actions	2014-15 HEAR Performance Plan	Draft	07/01/2014	06/30/2015	Employee	Actions
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<p>4. Add SMART Goals</p>	<ul style="list-style-type: none"> The Plan Details page displays. In the 1-SMART Goals section, click Add Activity then Add Goal. <div data-bbox="639 978 1305 1226" style="border: 1px solid gray; padding: 5px;"> <p>Course Request</p> <p>No items found</p> <p>Priority: Medium</p> <p>1 - SMART Goals</p> <table border="1"> <thead> <tr> <th>Name</th> <th>Version</th> <th>Type</th> <th>Due Date</th> <th>Completed On</th> <th>Priority</th> <th>Status</th> <th>Source</th> <th>Mandatory</th> <th>Actions</th> </tr> </thead> <tbody> <tr> <td>SMART Goal 1</td> <td>Goal</td> <td>30-JUN-2015</td> <td></td> <td>Medium</td> <td>New: 0% Completed</td> <td>Reviewer One</td> <td></td> <td></td> <td>Actions</td> </tr> <tr> <td>SMART Goal 2</td> <td>Goal</td> <td>30-JUN-2015</td> <td></td> <td>Medium</td> <td>New: 0% Completed</td> <td>Reviewer One</td> <td></td> <td></td> <td>Actions</td> </tr> </tbody> </table> </div> <div data-bbox="1354 995 1531 1129" style="border: 1px solid blue; border-radius: 10px; padding: 5px; display: inline-block; margin: 10px;"> Click Add Activity > Add Goal </div> <ul style="list-style-type: none"> The Create Goal window displays. Enter the Title of the SMART goal in the Title field, select the goal Category that aligns with the Mayor's Pillar then choose the Start Date and Due Date. Next, click the Add Detail button to advance to the next screen. <div data-bbox="639 1455 1313 1654" style="border: 1px solid gray; padding: 5px;"> <p>Create Goal</p> <p>Title* form different duties, as scheduled Type* SMART Goals Category* Job & Sustainable Development Start Date* 07/01/2014 Due Date* 06/30/2015</p> <p style="text-align: right;">** = required</p> <p style="text-align: right;"> <input type="button" value="Add"/> <input type="button" value="Add Detail"/> </p> <p>Goal Default Values</p> <p style="text-align: right;"><input type="button" value="Close"/></p> </div>	Name	Version	Type	Due Date	Completed On	Priority	Status	Source	Mandatory	Actions	SMART Goal 1	Goal	30-JUN-2015		Medium	New: 0% Completed	Reviewer One			Actions	SMART Goal 2	Goal	30-JUN-2015		Medium	New: 0% Completed	Reviewer One			Actions												
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