

Creating A Goal In Sumtotal Performance

To view your Goal Plan or create a new goal, perform the following:

- Under the “Self” tab on the top left-hand side of the screen:
 - Navigate to Self -> Performance -> My Goals
- If you want to create a new personal goal for an employee, from that employee’s Goal Plan, click New Look at “Target Recipient” and verify your name.
- By default, the “Target Recipient” is the employee from whose Goal Plan you accessed the Goal Details page. If you want to assign the goal to another user, click the icon and use the Employee Selector to select the employee.
- Enter a name for the goal, as it will appear in the employee’s Goal Plan and any other Talent forms that use the goal (such as the Goals section of a Performance form).
- Enter a detailed description of the goal, including specific objectives and any metrics.
- As the goal period progresses, use the “Results Achieved” field to include any results that the employee has achieved toward completing the goal.
- By default, the current (most recent) Goal Period is selected. Goal periods help to differentiate between goal assessment periods. If you want to assign the goal to another goal period, select it from the drop-down.
- Enter a relative importance Weight for the goal, as it will be rated against other personal goals. A higher rating indicates a goal that is more important and will therefore weigh more greatly in the overall rating of the goal.
- Specify a Start Date and End Date for when you expect the goal to be completed.
- Select a Completion Status and Percent Complete for the goal.

When you are finished configuring the personal goal, perform one of the following:

- Click “Save.” The goal will remain in the approval status in which you accessed it, if you had created a new goal, the status will be marked as “In Draft.”
- Click “Submit.”

Read more about Creating A Goal by accessing the [Performance Management guidebook](#).

Still have questions? Reach out to the Performance Management Team at PerformanceMgmt@rivco.org.