

## Overview

Use this job aid as a resource to view and approve your team’s goals and to create goals to your team.

## Approve Team Goals

When a direct report enters goals, a leader receives a Workday inbox task to review and approve the goals.

1. Two options are available to view and approve a direct report’s goal.
  - a. **First Option:** From the **Home** screen/dashboard, click the Inbox icon found at the top right-hand corner of the page.



Locate and select the **Manage Goals** task

- b. **Second Option:** From the Home screen/dashboard, scroll down to the **Awaiting Your Action** inbox items list.

### Awaiting Your Action



2. Click on the awaiting task item for action.
3. Review the following details for the goal:
  - a. **Goal**
  - b. **Description**

- c. **Status**
- d. **Category**
- e. **Organizational Alignment**
- f. **Due Date**

4. Options after reviewing the details are:



- a. **Approve** – this will unlock the Goal card from Pending Approval to In Progress
- b. **Send Back** – this will return the goal back to the direct report with a comment describing the reason and/or instructions to update the goal

### Send Back

To \*

Reason \*



- Click Submit. This returns the goal to the direct report for action.
  - Direct report updates goal and submit.
  - Returns to leader for approval.
- c. **Deny** – will terminate the entire business process and requires a comment explaining the reason for terminating the business process.

**Deny**

**Errors and Alerts Found** ▾

Selecting Deny may terminate the entire business process. Please enter your reason for terminating the business process.

Reason \*

Error: The field Reason is required and must have a value.

Click Submit

- d. **Cancel** – will confirm your desire to discard changes or to continue

**Discard Changes?**

Are you sure you want to discard changes made on this page?

**Add a Goal to Employees (Direct Report)**

Follow these steps to add goals to **one or more** of your direct reports.

- 1. From a leader’s **Home** screen/dashboard, click on Menu found at the left side of the screen/dashboard.



- 2. Scroll down the applications menu list to Team Performance and Manage Team Goals\_updated 09/13/2023

click on the application.



- 3. On the right-side of the new screen, you have a box with options of Actions.

**Actions**

Add Goal to Employees

My Team's Goals

Archive Goals

More (6)

- Click Add Goal to Employees
- Option to Create New Goal or Copy Existing Goal

**Add Goal to Employees**

Create New Goal

Copy Existing Goal

**Assign To**

Employees

Organizations

- Assign to – type in employee name(s)
- Click OK.
- Enter relevant information into text field boxes. **Red**

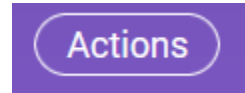
asterisk (\*) designates a required field to complete.

- Check Editable if allowing employee to edit OR remove the check so the employee is unable to edit
- Click Add to enter another goal, if needed.
- Otherwise, Click Submit.
- Confirmation of goal added.

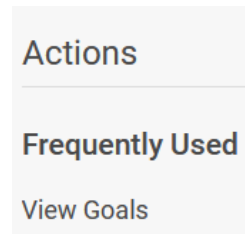
Use the following steps to enter goal(s) to one direct report.

1. Type employee name in the Workday search bar.

2. Select the name from the list of employees.
3. Use the Actions button from the left (purple) navigation pane of the employee's profile.



4. Select View Goals from the Actions list.



5. Click the Create Goal for Worker button.



6. Enter data into relevant text field boxes. Red asterisk (\*) designates a required field.

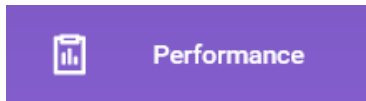
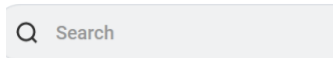
7. Click Submit.

8. Confirmation of goal submitted.

## View Individual Goals

Follow these steps to view an employee’s individual goals.

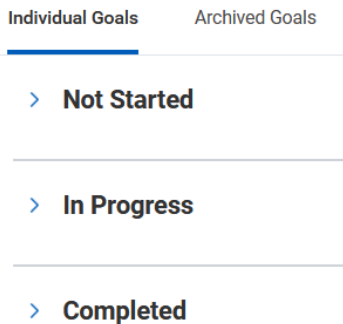
1. Navigate to the Employee’s Profile by using the Search bar.
2. Select the name from the list of employees.
3. Use the left (purple) navigation pane, and scroll down and Click on Performance.



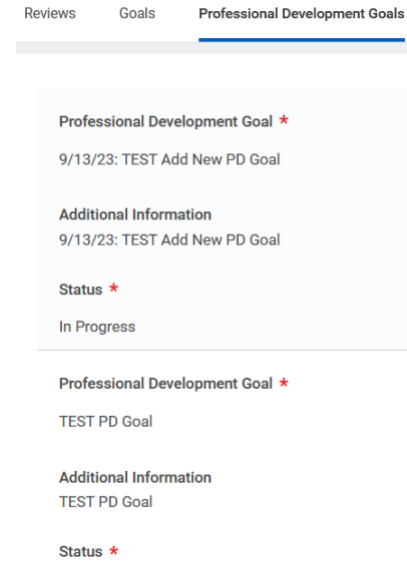
4. From the tabs across the top of the screen, click on one of the following goal options:

Reviews      Goals      Professional Development Goals

- a. **Individual Goals** – able to view goal cards in different steps of the process: Not Started, In Progress, Completed, Cancelled, Not Applicable.



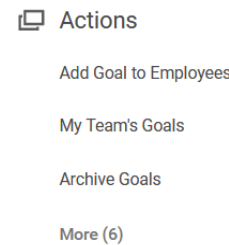
- b. **Professional Development Goals:** if goals were entered, a list of professional development goals



## View Team Goals

Follow these steps to view goals for the entire team.

1. Click the **Team Performance** application.
2. Click My Team’s Goals under the Actions list.



3. Enter your Supervisory Organization. View by = Worker

### My Team's Goals

Supervisory Organization \*

View By \*

**OK** Cancel

Click OK.

4. A table listing your employee and their goals.

By Worker 30 Items 📄 📄 📄

Worker	Goal Section	Goal	Description	Organization Alignment	Individual Goals	Status	Due Date
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- You can export this data to an excel spreadsheet OR use the 2-arrows to expand the table view.



- Exporting data may take some time. Able to download.
- Use the 2-arrows again to return the table to its original size.