

# Goal Setting Job Aids

April 2024

Goal Setting Job Aids

These job aids provide step-by-step resources to managing your Goals in Workday.

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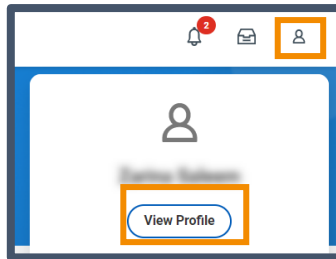
## Creating an Individual Goal in Workday

### Purpose

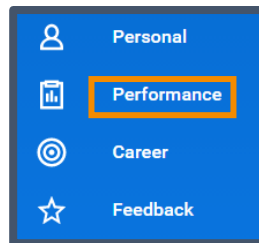
This job aid provides step-by-step instructions on how to create individual goals in Workday.

[Create and review an individual goal](#)

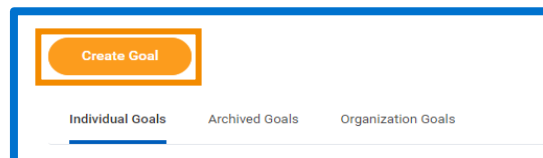
1. Select **'View Profile'** from the pop-up menu.



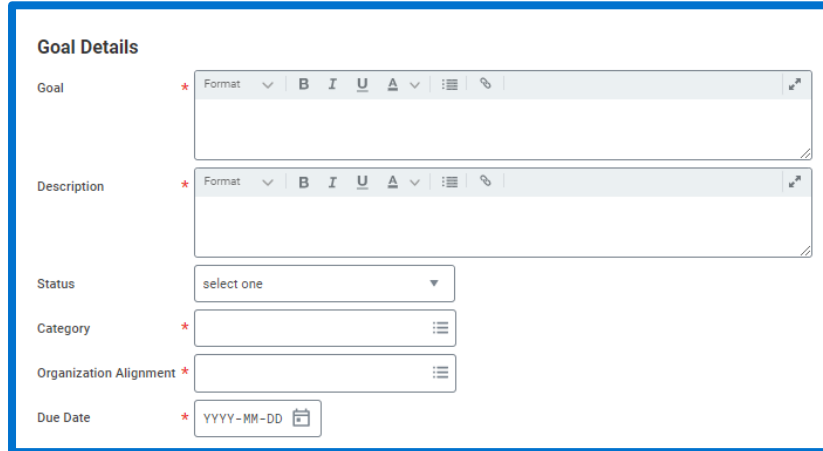
2. Select **'Performance'**



3. Select **'Create Goal'** from the top menu.



4. Enter the title of the goal and any subsequent information in fields. *All fields are mandatory.*



**Goal Details**

Goal \*

Description \*

Status

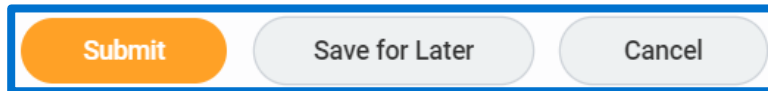
Category \*

Organization Alignment \*

Due Date \*

5. Once you complete the information you will have the following 3 options:

- 'Submit'**: This will submit your goal and generate a Workday notification to your manager that a goal has been submitted and requires their approval. You must **Submit** each goal individually.
- 'Save for Later'**: This will save your goal as a draft for further completion.
- 'Cancel'**



6. Once a goal has been approved by your Manager, you will receive a Workday notification of the approval.



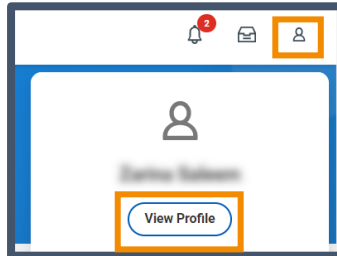
# Review and Edit Individual Goals - Employee

## PURPOSE

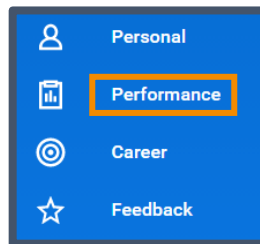
This job aid provides step-by-step instructions on how to review and edit individual goals in Workday

[Review and edit an individual goal](#)

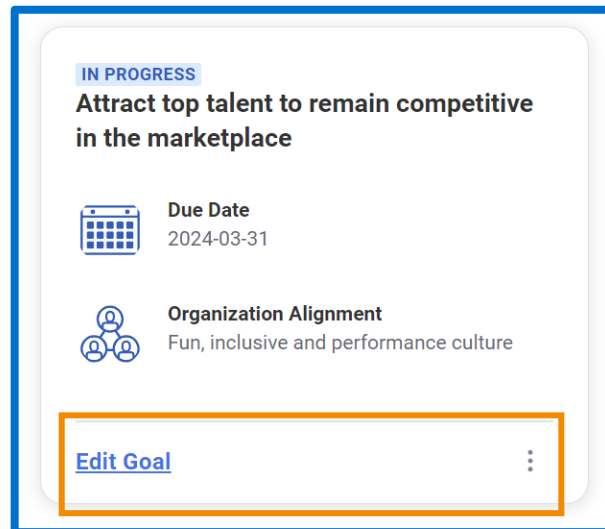
1. Select **'View Profile'** from the pop-up menu.



2. Select **'Performance'**

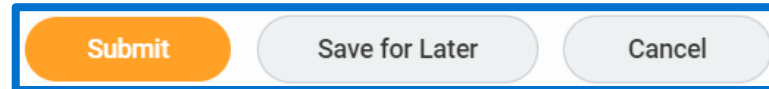


3. Select **'Edit Goal'** on the goal you would like to edit.



4. Once you have edited your goal, you will have the following 3 options:

- a. **'Submit'**: This will submit your goal and generate a Workday notification to your manager that a goal has been submitted and requires their approval. You must **Submit** each goal individually.
- b. **'Save for Later'**: This will save your goal as a draft for further completion.
- c. **'Cancel'**



5. Once a goal has been approved by your Manager, you will receive a Workday notification of the approval.



## Delete Individual Goals - Employee

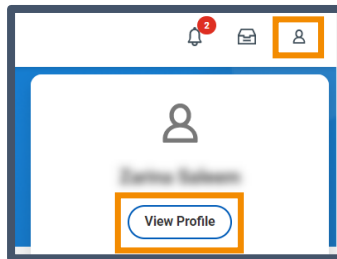
### PURPOSE

This job aid provides step-by-step instructions on how to **delete approved, saved for later** and **sent back** individual goals in Workday.

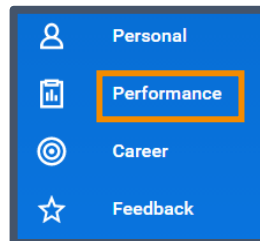
Delete an 'approved' individual goal

**Note:** Only an approved goal has the capability to be deleted.

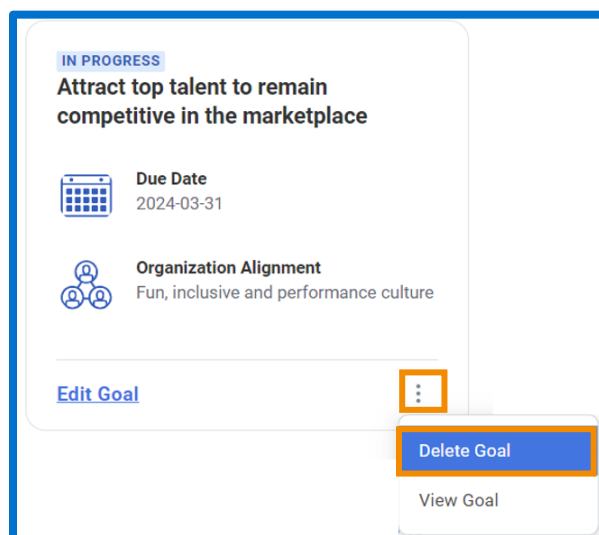
1. Select '**View Profile**' from the pop-up menu.



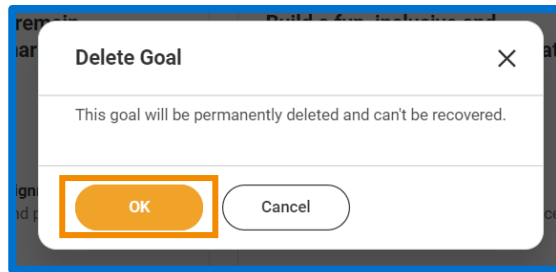
2. Select '**Performance**'



3. You will have a summary view of the approved, pending, saved and cascaded goals. Click on the three dots on the goal you want to delete. Select "**Delete Goal**"



4. A message will pop up. Select “OK”



All goals that are edited or deleted will go to your Manager for approval.



### Delete a 'saved for later' goal

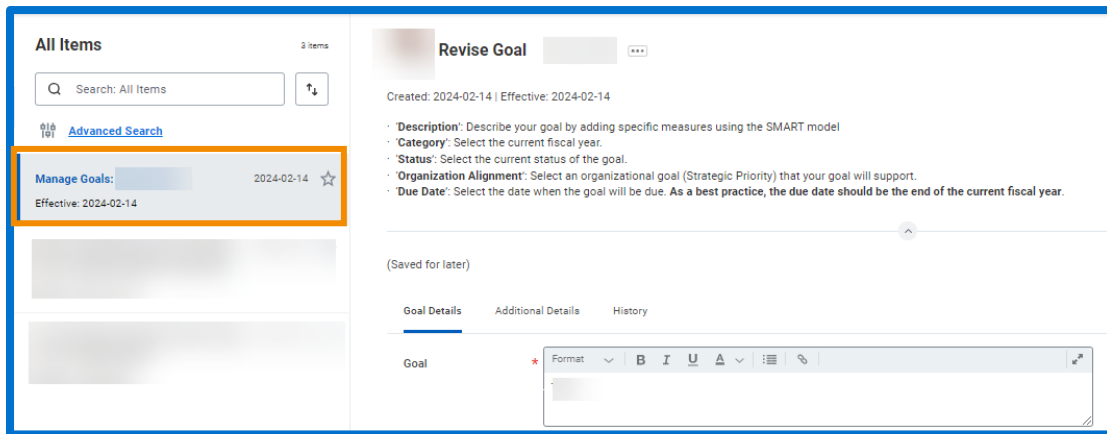
Completing the steps in this job aid will delete a 'saved for later' goal and the goal details will not be saved in Workday. If you need to reference any of your goal details in the future, it is highly recommended to copy the goal details into a Word document prior to completing the steps below.

1. From the Workday Homepage, select **'My Tasks'** located in the top-right corner.

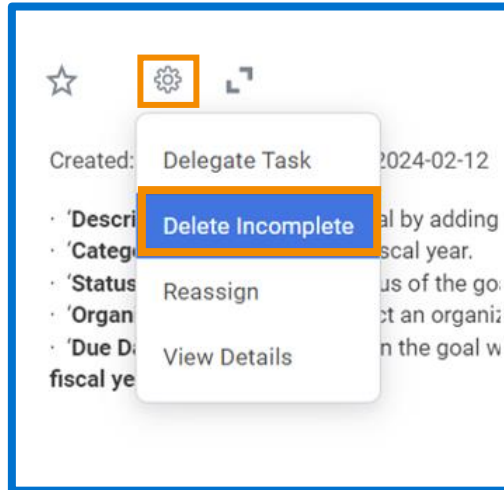


2. From **'My Tasks'** select **"Manage Goals"**

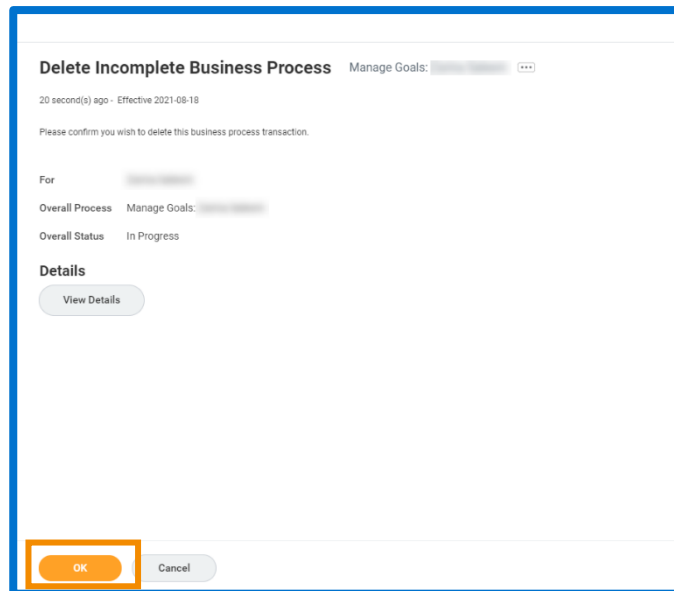
**Note:** All goals that are marked as **'Save for Later'** will be in **'My Tasks'** as **"Manage Goals: Employee Name"**.



3. Select the gear icon, then select **'Delete Incomplete'**



4. To complete the process, select **'OK'**.



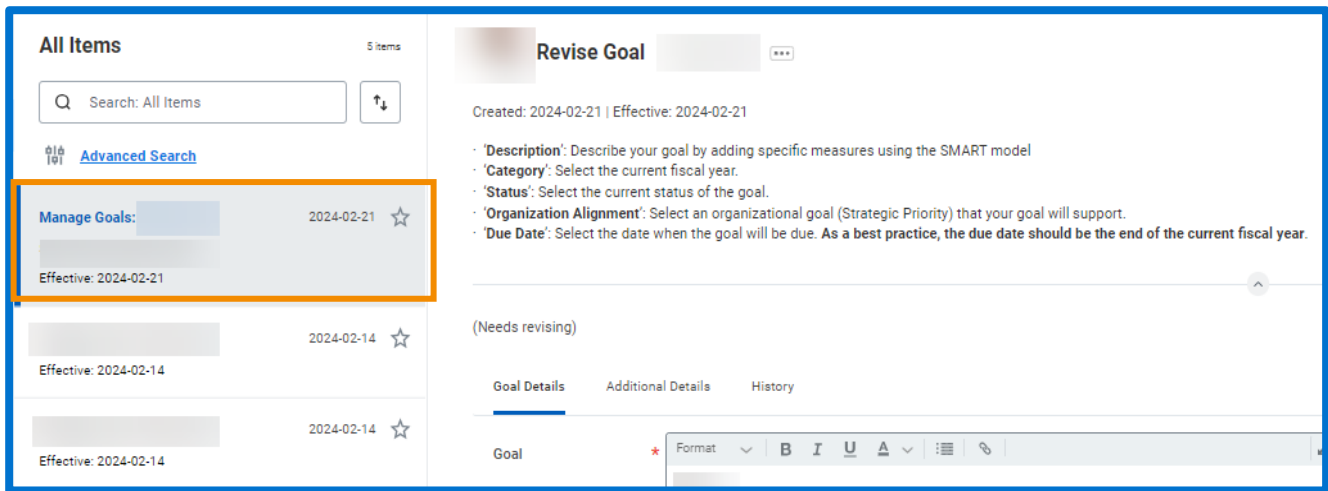
### Delete a 'sent back' goal

Completing the steps in this job aid will delete a sent back goal and the goal details will not be saved in Workday. If you need to reference any of your goal details in the future, it is highly recommended to copy the goal details into a Word document prior to completing the steps below.

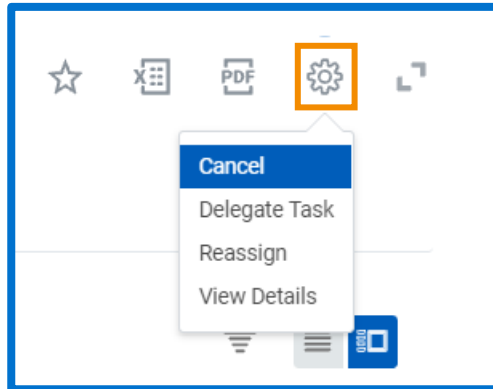
1. From the Workday Homepage, select **'My Tasks'** located in the top-right corner.



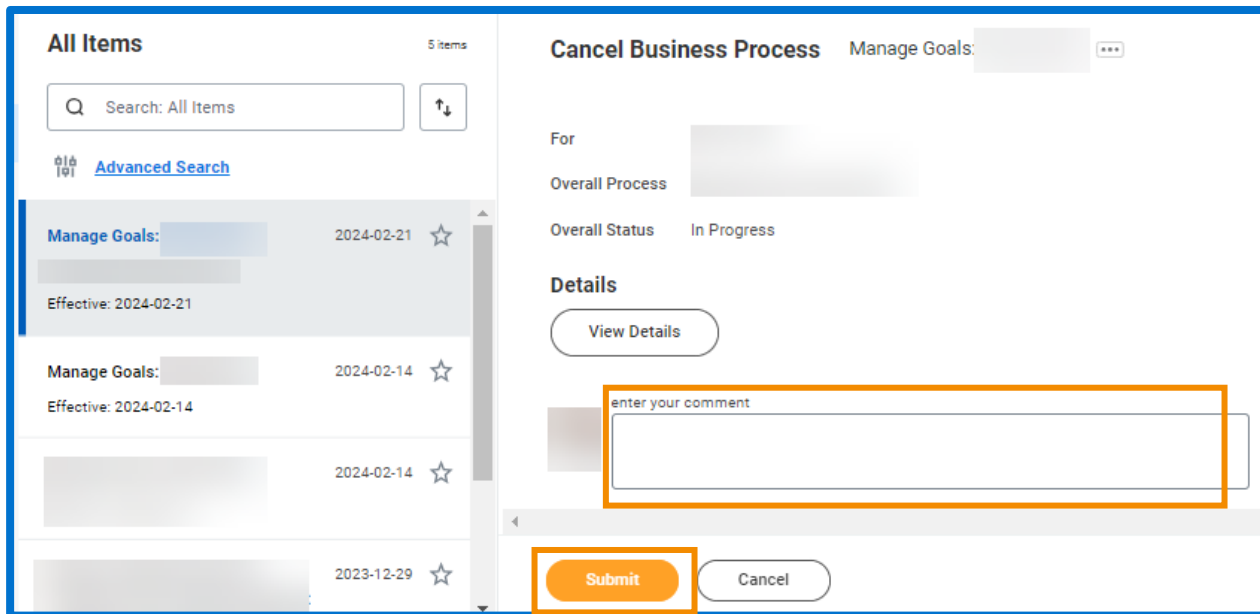
2. From your Workday Inbox, select the sent back goal.



3. Select the gear icon, then select '**Cancel**'.



4. Enter your comment and Select '**Submit**' to complete the cancellation process.



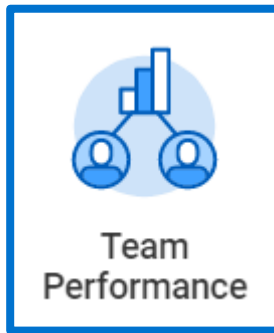
## Cascade a New Goal - Manager

### PURPOSE

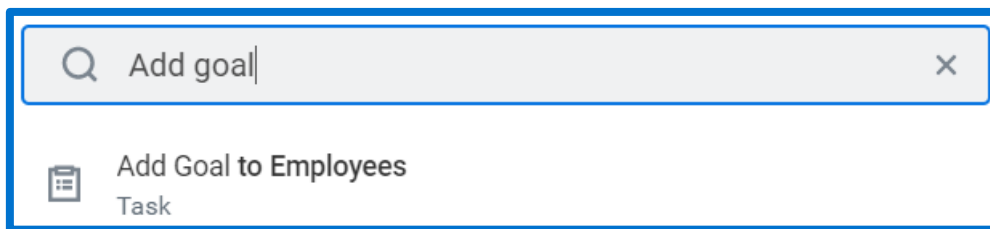
This job aid provides step-by-step instructions on how to cascade a new goal to employees within your team in Workday.

#### Cascade a new goal

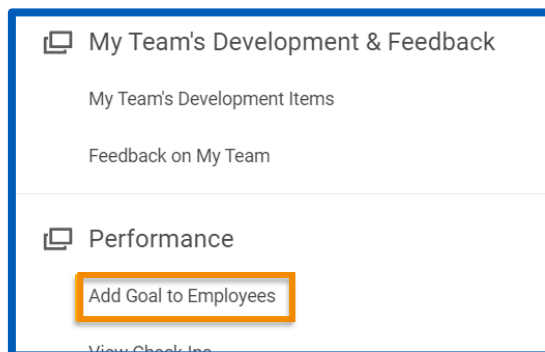
1. From the Workday Homepage, select the **'Team Performance'** App.



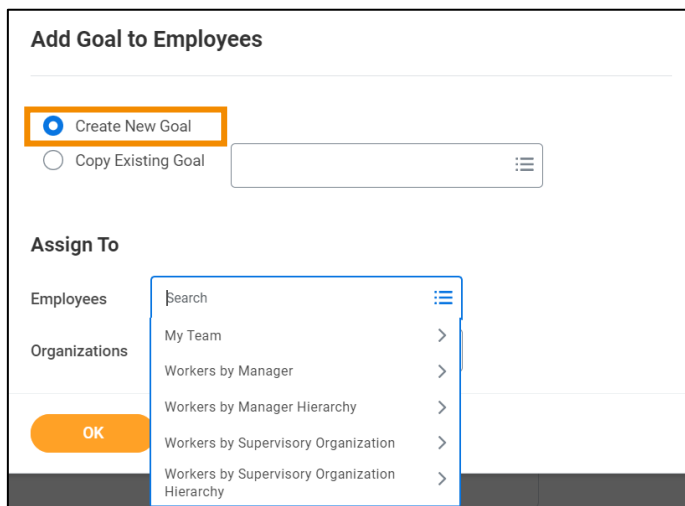
**Note:** You can also type **'Add goal to Employees'** into the search bar at the top of the screen to find the task.



2. If you had selected the **'Team Performance'** worklet, select **'Add Goal to Employees'**.

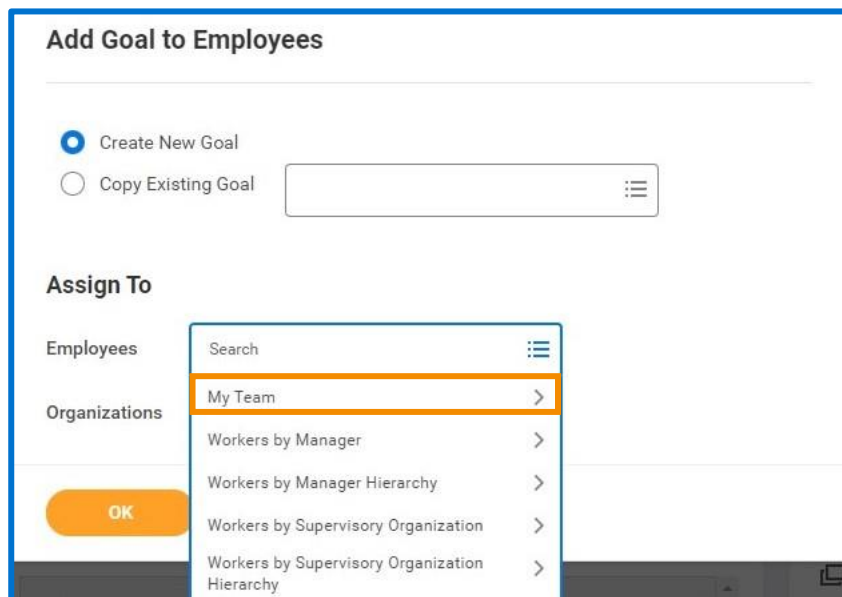


## 3. Select 'Create New Goal'.



The screenshot shows a web form titled "Add Goal to Employees". At the top, there are two radio buttons: "Create New Goal" (which is selected and highlighted with an orange box) and "Copy Existing Goal" (which is unselected). To the right of the "Copy Existing Goal" button is a search input field with a menu icon. Below this, there is a section titled "Assign To" with two categories: "Employees" and "Organizations". Under "Employees", there is a search input field with a menu icon. Under "Organizations", there is a list of options: "My Team", "Workers by Manager", "Workers by Manager Hierarchy", "Workers by Supervisory Organization", and "Workers by Supervisory Organization Hierarchy". Each option has a right-pointing arrow. At the bottom left of the form is an orange "OK" button.

## 4. To cascade the goal to your team, select the appropriate employee(s) from the drop-down list by selecting 'My Team' to which the goal should be applied.



This screenshot is similar to the previous one, but it shows the "Assign To" dropdown menu open. The "My Team" option is highlighted with an orange box, indicating it has been selected. The other options in the dropdown are "Workers by Manager", "Workers by Manager Hierarchy", "Workers by Supervisory Organization", and "Workers by Supervisory Organization Hierarchy". The "OK" button is still visible at the bottom left.

The screenshot shows the 'My Team' dropdown menu. The menu is titled 'My Team' and contains a list of team members, each with a checkbox and a cloud icon. The menu is highlighted with an orange border. The background shows the 'Add Goal' section with options for 'Create New' and 'Copy Existing', and the 'Assign To' section with 'Employees' and 'Organizations' search fields.

- a. To cascade the goal to your entire supervisory organization, select the appropriate organization from the drop-down list by selecting '**My Organization**'.

Select the Supervisory Organization to which the goal should be applied and check the '**Include Subordinate Organizations**' box.

The screenshot shows the 'Add Goal to Employees' form. The 'Assign To' section has 'Employees' and 'Organizations' search fields. The 'Organizations' dropdown menu is open, showing a list of organizations. The 'My Organizations' option is highlighted with an orange border. The form also includes an 'OK' button and a 'Rating - Current Norm' section.

5. Enter the goal and any subsequent information in the following fields. **All fields are required:**

- 'Description':** Describe the goal by adding specific measures e.g., focus areas, initiatives, activities, KPI's where applicable
- 'Category':** Select the current fiscal year.
- 'Organization Alignment':** Select an organizational goal (Strategic Priority) that your goal will support.
- 'Due Date':** Select the date when the goal will be due. **As a best practice, the due date should be the end of the current fiscal year.**
- 'Editable':** Select this checkbox to allow for this goal to be edited in the future.

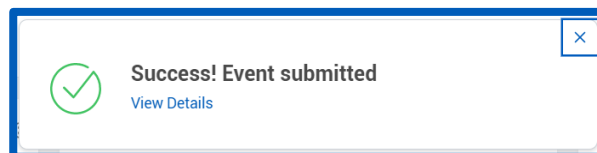
**Note:** The number besides the **'Assign To'** indicates the total number of employees to which the goal will be cascaded.

The screenshot shows a form titled 'Assign To' with a red box around the number '9'. The form contains the following fields:

- Goal:** A text area with a rich text editor toolbar (Format, Bold, Italic, Underline, Text Color, Background Color, Bulleted List, Numbered List, Link, Unlink).
- Description:** A text area with a rich text editor toolbar (Format, Bold, Italic, Underline, Text Color, Background Color, Bulleted List, Numbered List, Link, Unlink).
- Category:** A dropdown menu with a list icon.
- Organization Alignment:** A dropdown menu with a list icon.
- Due Date:** A date picker with the format 'YYYY-MM-DD' and a calendar icon.
- Editable:** A checkbox that is currently checked.

At the bottom of the form are three buttons: 'Remove', 'Add', and 'Submit'. Below the form are three buttons: 'Submit', 'Save for Later', and 'Cancel'.

6. Once the goal has been submitted, you will receive a prompt confirming the submission.



You as a Manager will need to provide direction to your employee(s) on reviewing/editing the cascaded goal.

**Note:** Any edits or deletions will trigger the approval business process.



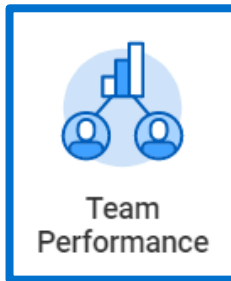
# Cascade an Existing Goal - Manager

## PURPOSE

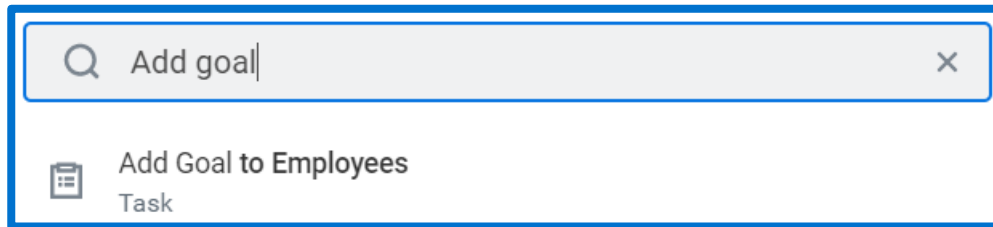
This job aid provides step-by-step instructions on how to cascade an existing goal to employees within your team in Workday.

### Cascade an existing goal

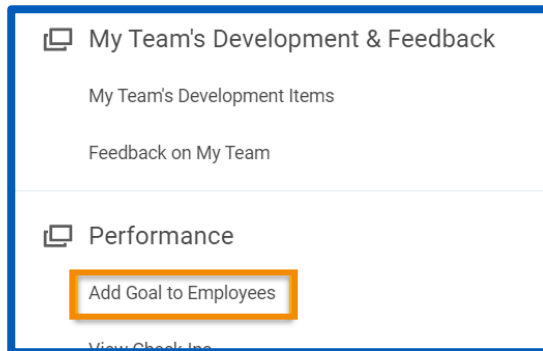
1. From the Workday Homepage, select the **'Team Performance'** worklet.



**Note:** You can also type **'Add goal to Employees'** into the search bar at the top of the screen to find the task.

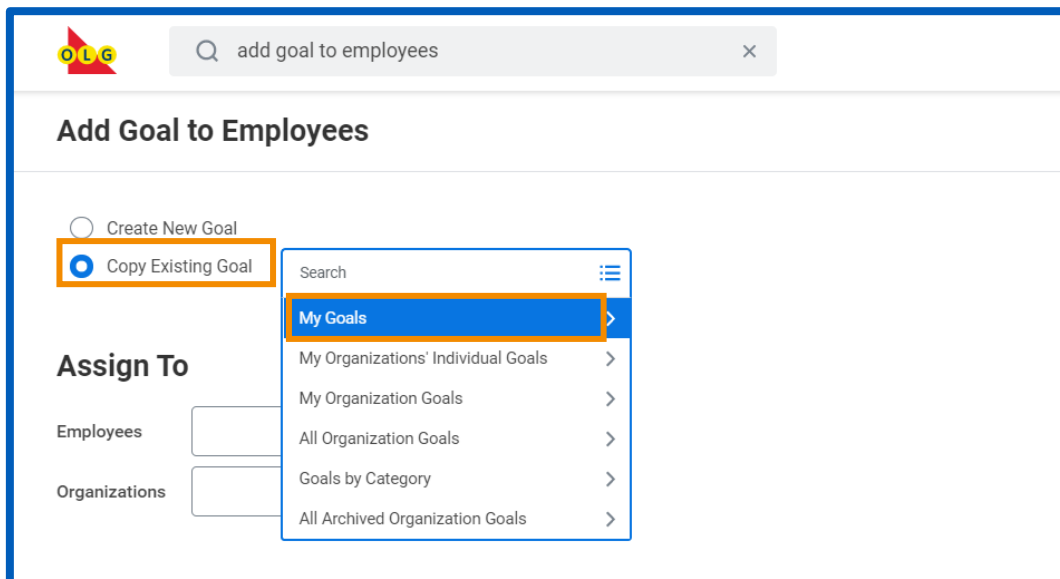


2. If you had selected the **'Team Performance'** worklet, select **'Add Goal to Employees'**.



## 3. Select 'Copy Existing Goal'.

a. Select 'My Goals' to which goal you would like to cascade.



OLG

add goal to employees

### Add Goal to Employees

☐ Create New Goal

☒ Copy Existing Goal

Assign To

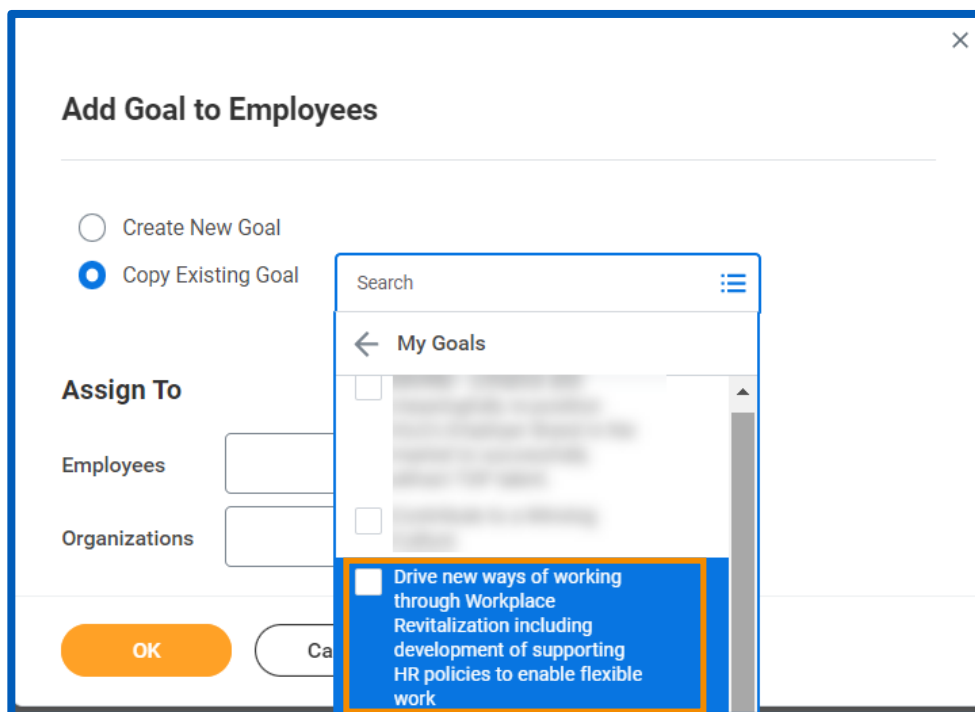
Employees

Organizations

Search

- My Goals
- My Organizations' Individual Goals
- My Organization Goals
- All Organization Goals
- Goals by Category
- All Archived Organization Goals

b. Select the appropriate goal from the drop-down list.



### Add Goal to Employees

☐ Create New Goal

☒ Copy Existing Goal

Assign To

Employees

Organizations

Search

My Goals

- ☐ Drive new ways of working through Workplace Revitalization including development of supporting HR policies to enable flexible work

OK

Cancel

- c. To cascade the goal to your team, select the appropriate employee(s) from the drop-down list by selecting **'My Team'** to which the goal should be applied.

**Add Goal to Employees**

☐ Create New Goal

☒ Copy Existing

**Assign To**

Employees

Organizations

My Team

Workers by Manager

Workers by Manager Hierarchy

Workers by Supervisory Organization

Workers by Supervisory Organization Hierarchy

Search

**Add Goal to Employees**

☐ Create New Goal

☒ Copy Existing

**Assign To**

Employees

Organizations

My Team

Workers by Manager

Workers by Manager Hierarchy

Workers by Supervisory Organization

Workers by Supervisory Organization Hierarchy

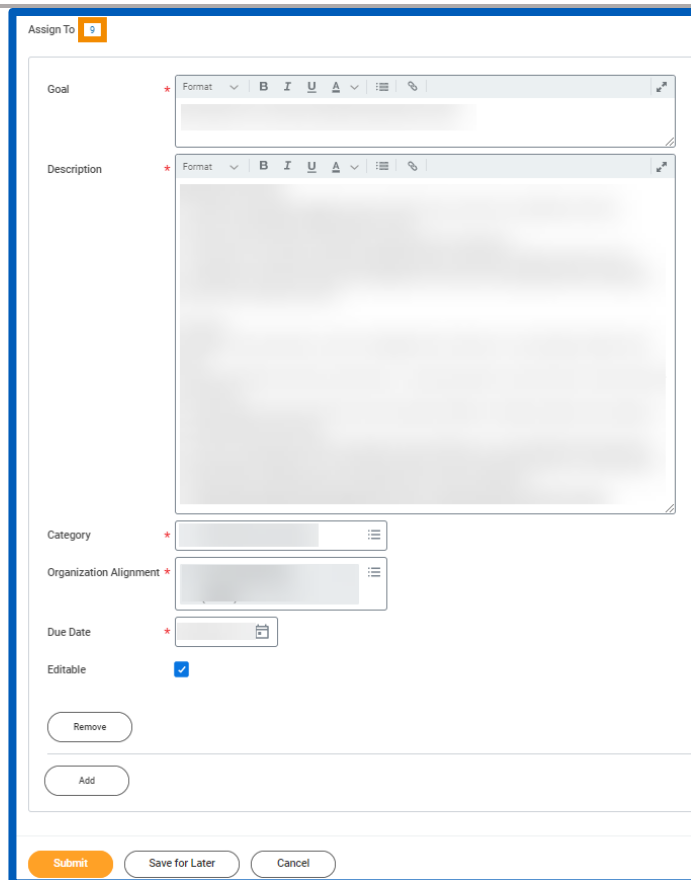
Search

- d. To cascade the goal to your entire supervisory organization, select the appropriate organization from the drop-down list by selecting **'My Organizations'**.

Select the Supervisory Organization to which the goal should be applied and check the **'Include Subordinate Organizations'** box.

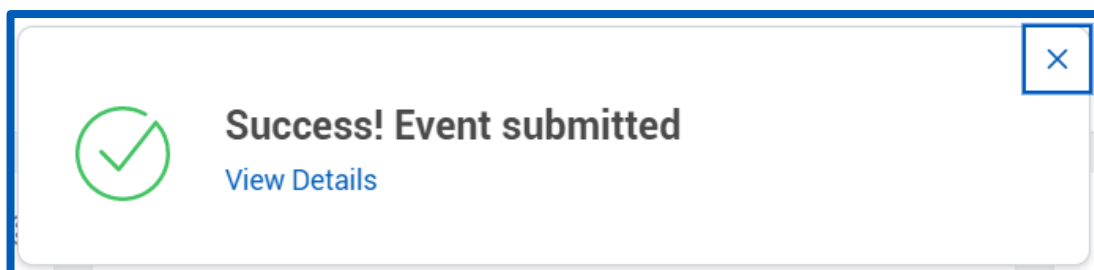
4. Review the goal and any subsequent information in the following fields. **All fields are required:**
- 'Description'**: Describe the goal by adding specific measures e.g., focus areas, initiatives, activities, KPI's where applicable
  - 'Category'**: Select the current fiscal year.
  - 'Organization Alignment'**: Select an organizational goal (Strategic Priority) that your goal will support.
  - 'Due Date'**: Select the date when the goal will be due. **As a best practice, the due date should be the end of the current fiscal year.**
  - 'Editable'**: Select this checkbox to allow for this goal to be edited in the future.

**Note:** The number besides the **'Assign To'** indicates the total number of employees to which the goal will be cascaded.



The screenshot shows a web form titled "Assign To" with a blue border. It contains several input fields: "Goal" and "Description" (both with rich text editors), "Category" (a dropdown menu), "Organization Alignment" (a dropdown menu), "Due Date" (a date picker), and "Editable" (a checked checkbox). At the bottom of the form are "Remove" and "Add" buttons. Below the form are three buttons: "Submit" (orange), "Save for Later", and "Cancel".

5. Once the goal has been submitted, you will receive a prompt confirming the submission.



You as a Manager will need to provide direction to your employee(s) on reviewing/editing the cascaded goal.

**Note:** Any edits or deletions will trigger the approval business process.