

## Overview

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

## Approve Team Goals


When a direct report enters goals, you receive a Workday Inbox task to review and approve the goals.

- From the **Home** screen, click the **Inbox** icon.



- Locate and select the **Manage Goals** task.
- Review the following details for each goal:
  - Goal:** Review the goal.
  - Description:** Review the description of the goal.
  - Category:** Review the category to ensure it aligns with the goal.
  - Status:** Review the status.
  - Supports:** If needed, review the supporting organizational goal to ensure it aligns with the goal.
  - Due Date:** Review the due date.
  - (If applicable) **Associated Reviews:** If an associated review displays, review the information to ensure it aligns with the goal.

- Use the following table to determine your next step:

If...	Then...
You would like to leave a note for the employee	<ul style="list-style-type: none"> <li>Click the dialogue icon near bottom of page. </li> <li>Type “@” and the employee’s name to tag them (A separate box opens to type in employee name).</li> <li>Type the note.</li> <li>Click <b>Post</b>.</li> </ul>
You approve the goal(s)	<ul style="list-style-type: none"> <li>Click <b>Approve</b>.</li> </ul> <p><b>Note:</b> The goal(s) display on the employee profile.</p>
You would like the employee to edit the goal(s)	<ul style="list-style-type: none"> <li>Click <b>Send Back</b>.</li> <li>Enter a <b>Comment</b> to describe what information the employee needs to add or edit.</li> <li>You will see a confirmation message with a Pop-up box that the event is sent back to the Employee.</li> </ul>

You do not approve the goal(s)	<ul style="list-style-type: none"> <li>Click <b>Deny</b>.</li> <li>A new window opens to enter the <b>Reason</b> for the denial.</li> <li>Click <b>Submit</b>.</li> </ul>
You would like to save the task for a later time	<ul style="list-style-type: none"> <li>Click <b>Cancel</b>.</li> </ul> <p><b>Note:</b> The task remains in your Workday Inbox until you select an action.</p>

### Add Goal to Employee(s)

Follow these steps to add goals to one or more of your direct reports, including cascading organizational goals. You also have the ability to create organizational goals.

1. Click the **Team Performance** application.



2. From the **Actions** menu, click **Add Goal to Employees**.
3. Select one of the following actions:
  - **Create New Goal:** Select this option to create a goal that you will assign to one or more of your direct reports.
  - **Copy Existing Goal:** Select this option to copy (cascade) an existing goal to one or more of your direct reports.

4. Select one of the following methods to assign the goal:
  - **Employees:** Select this option to add the goal to one or more of your direct reports. To select more than one Employee, click the box to the left of each Employee's name you would like to add. If you are adding all Employees listed, click the box on the top left of the chart.
  - **Organizations:** Select this option to add the goal to all employees within an organization you manage.

5. Click **OK**.

6. Use the following table to determine your next action:

If...	Then...
You are copying an existing goal	<ul style="list-style-type: none"> <li>The goal details auto-populate.</li> <li>Review the goal details.</li> <li>If applicable, enter any missing details.</li> <li>Click <b>Submit</b>.</li> </ul>
You are creating a new goal	<ul style="list-style-type: none"> <li>Type the <b>Goal</b>.</li> <li>Type the <b>Description</b>.</li> <li>If applicable, select the <b>Category</b>.</li> <li>If applicable, select the <b>Supports</b>.</li> <li>If applicable, enter the <b>Due Date</b>.</li> <li>If the goal should be editable by the employee, click the <b>Editable</b> checkbox. Otherwise, leave the box blank.</li> </ul> <p><b>Note:</b> To add additional goals, click <b>Add</b> and repeat the steps above.</p>

7. Click **Submit**.

**Note:** The goal displays on the selected employee's profiles.

## View Individual Goals

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

1. Navigate to the **Employee's Profile**.

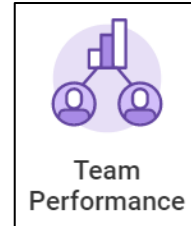
**Note:** Use the Search Bar or your Org Chart to locate the employee and click their name.

2. From the left sidebar, click **Performance**.
3. From the tabs across the top of the screen, click one of the following goal options:
  - **Individual Goals:** View the employee's approved individual goal(s).
  - **Professional Development Goals:** View the employee's professional development goals.
  - **Archived Goals:** View previous goals the employee has archived.

## View Team Goals

Follow these steps to view goals for your entire team.

1. Click the **Team Performance** application.



2. From the **Actions** menu, click **Goals**.
3. From the **Supervisory Organization** field, select the Supervisory Organization that you would like to view goals for.
4. From the **View By** field, select to view by **Worker** or by **Goal**.
5. Click **OK**.
6. A report of goals for the selected Supervisory Organization displays.