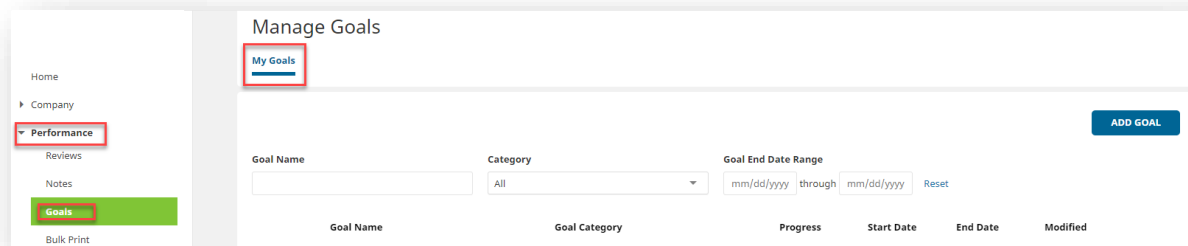


## Quick Guide - Adding Your Goals

### Navigation

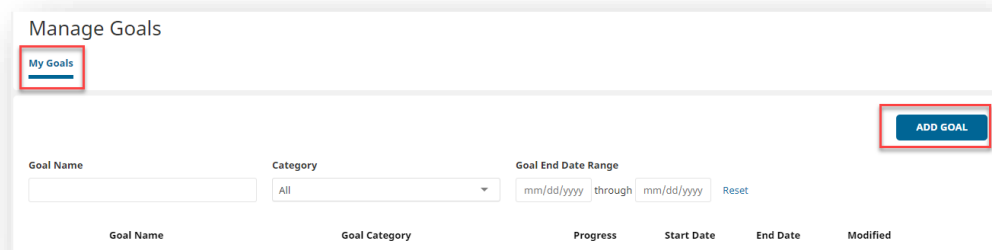
NOTE: To be used prior to annual review cycle. Go to **Performance** in the left hand menu and click on **Goals**. To access personal goals, click on **My Goals**. To add a goal to a review that is in progress, see Adding Goals to a Review that is in Progress.



The screenshot shows the 'Manage Goals' interface. On the left, a navigation menu includes 'Home', 'Company', 'Performance' (highlighted with a red box), 'Reviews', 'Notes', 'Goals' (highlighted with a green box), and 'Bulk Print'. The main content area is titled 'Manage Goals' and features a 'My Goals' link (highlighted with a red box) at the top left. Below this, there are three input fields: 'Goal Name' (text input), 'Category' (dropdown menu with 'All' selected), and 'Goal End Date Range' (two date inputs with 'through' in between and a 'Reset' link). An 'ADD GOAL' button is located in the top right corner. At the bottom, a table header is visible with columns: 'Goal Name', 'Goal Category', 'Progress', 'Start Date', 'End Date', and 'Modified'.

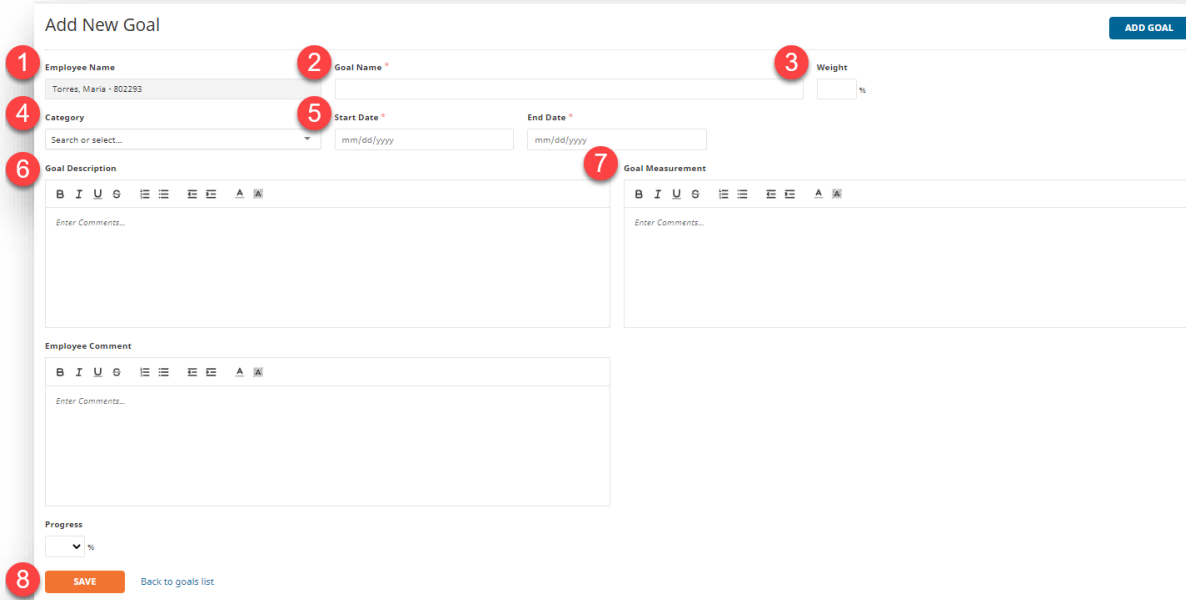
### Adding a Goal

To add a goal, click on the **Add Goal** button.



This is a close-up view of the 'Manage Goals' page. The 'My Goals' link is highlighted with a red box. The 'ADD GOAL' button is also highlighted with a red box. The form fields for 'Goal Name', 'Category', and 'Goal End Date Range' are visible below the button.

Enter the following Information:



The screenshot shows the 'Add New Goal' form with the following fields and callouts:

- 1** Employee Name: Pre-filled with 'Torres, Maria - 802293'.
- 2** Goal Name: An empty text input field.
- 3** Weight: A text input field followed by a '%' symbol.
- 4** Category: A dropdown menu with 'Search or select...' as the placeholder.
- 5** Start Date: A date input field with a 'mm/dd/yyyy' placeholder.
- 5** End Date: A date input field with a 'mm/dd/yyyy' placeholder.
- 6** Goal Description: A rich text editor with a toolbar and a placeholder 'Enter Comments...'.
- 7** Goal Measurement: A rich text editor with a toolbar and a placeholder 'Enter Comments...'.
- 8** Progress: A dropdown menu with a '%' symbol.

At the bottom of the form, there is a 'SAVE' button and a 'Back to goals list' link.

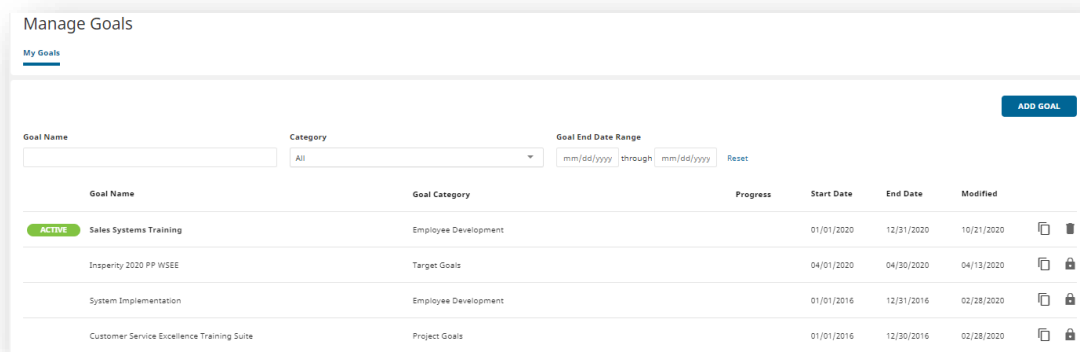
- 1** Your **Employee Name** will be populated automatically.
- 2** The **Goal Name** of the goal you would like to enter.
- 3** *Optional:* Choose a **Weight** you would like to assign to this specific goal to count towards your overall score. This is optional at this point of time; however each goal will need to be weighted in a performance review. You will have an opportunity to weigh the goal in the performance review at review time.
- 4** *Optional:* Select a **Category** for the goal.
- 5** Enter a **Start Date** and an **End Date** for the goal. The **End Date** will determine which goal(s) will be added to a performance review based on the performance review period.
- 6** Enter a **Goal Description**.
- 7** Enter a **Goal Measurement**.
- 8** **Save** the goal.

To help employees stay aware of when a goal is nearing its due date, a Home Page notification in addition to an email will be sent when a goal is 30 days from the due date.

## Managing Your Goals


NOTE: To be used prior to annual review cycle. Go to **Performance** in the left hand menu and click on **Goals**.

To access personal goals, click on the **My Goals**. You can use the filtering tools in the middle of your screen to find a goal that has already been entered.




Find the name of the goal you would like to edit and click on the name to enter the details of the goal.


The green **Active** button indicated that this goal is a current goal, not associated with a performance review.

Any goal with the **lock** icon  means that you are unable to edit the goal from the goals screen due to its association with a performance review either in-progress or closed.

To edit the goal in a review that is in-progress, edit the goal from within the performance review.

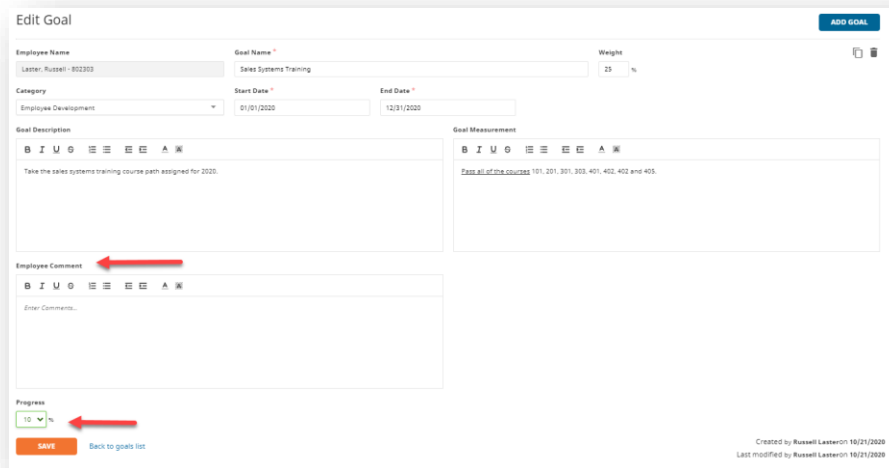
You may not edit any goal that is in a performance review that has been completed.

The **delete** icon  allows you to delete the goal. Please note that you are not able to recover this goal once deleted.

The **copy** goal icon  allows you to copy the contents of a goal to a new goal.

## Updating your goals

Once you have entered into an active goal, you can update any of the information including adding a process percentage to indicate how far you have progressed in that goal or any comments you would like to add for that goal.



**Edit Goal** ADD GOAL

Employee Name: Laster, Russell - 802203    Goal Name: Sales Systems Training    Weight: 25%

Category: Employee Development    Start Date: 01/01/2020    End Date: 12/31/2020

**Goal Description**  
Take the sales systems training course path assigned for 2020.

**Goal Measurement**  
Pass all of the courses 101, 201, 301, 303, 401, 402, 403 and 405.

**Employee Comment**  
Enter Comments...

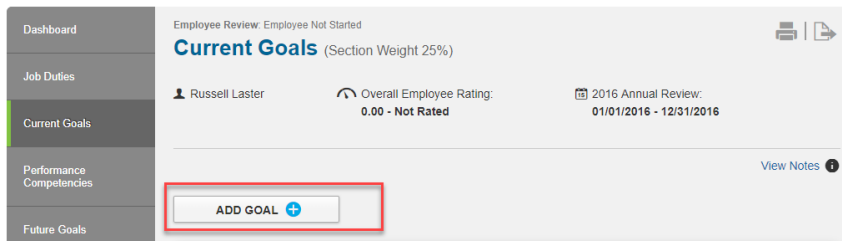
**Progress**  
10%

**SAVE**    [Back to goals list](#)

Created by Russell Laster on 10/21/2020  
Last Modified by Russell Laster on 10/21/2020

## Adding Goals to a Review that is in Progress

To add a goal to a review that is in progress, navigate to the **Current Goals** section in the Performance Review. Click **Add Goal** to create a current goal within the review.



Dashboard    Employee Review: Employee Not Started

**Current Goals** (Section Weight 25%)

Job Duties

Current Goals

Performance Competencies

Future Goals

Russell Laster    Overall Employee Rating: 0.00 - Not Rated    2016 Annual Review: 01/01/2016 - 12/31/2016

**ADD GOAL +**    [View Notes](#)