

View and Manage Goals

PURPOSE

The purpose of this job aid is to assist employees in managing his/her goals in Workday. Once manager adds or cascades goal(s) to employee(s), employee(s) receive a notification in Workday and in their outlook inbox to view and manage assigned goals. Follow steps listed below to view and manage goals.

For detailed information, access [Broward College Managing Organizational Goals Manual](#) and contact [Employee Relations](#) for assistance.

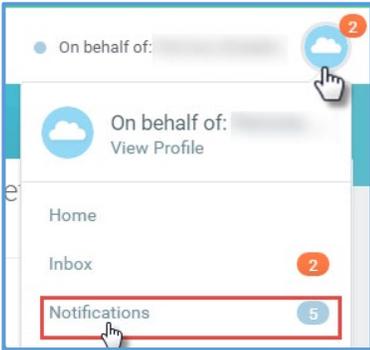
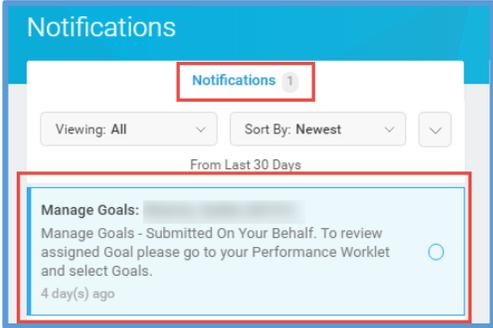
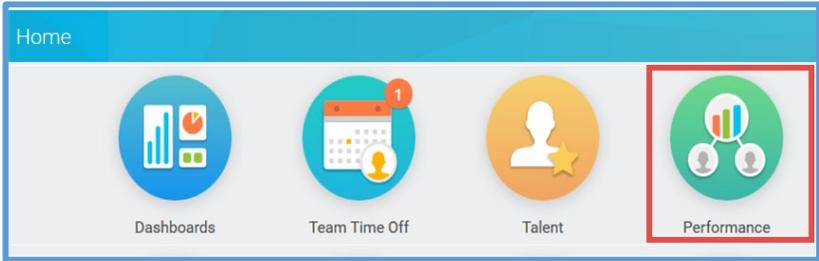
TASKS IN THIS JOB AID

[View and Manage Goals](#)

[View My Goal Alignment](#)

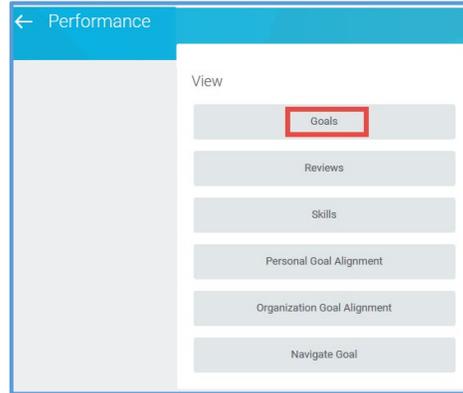
[FAQs](#)

PROCEDURE

Step 1	Login to Workday
Step 2	<p>Notifications can be viewed by clicking on My Account > Notification</p> <div style="display: flex; justify-content: space-around;">   </div> <p>Once notification is received, follow the steps listed below to manage organizational goals to map your organizational goals to hierarchy level</p>
Step 3	<p>From the homepage, click on the Performance Worklet</p> 

Step 4

Under *View*, click on **Goals**

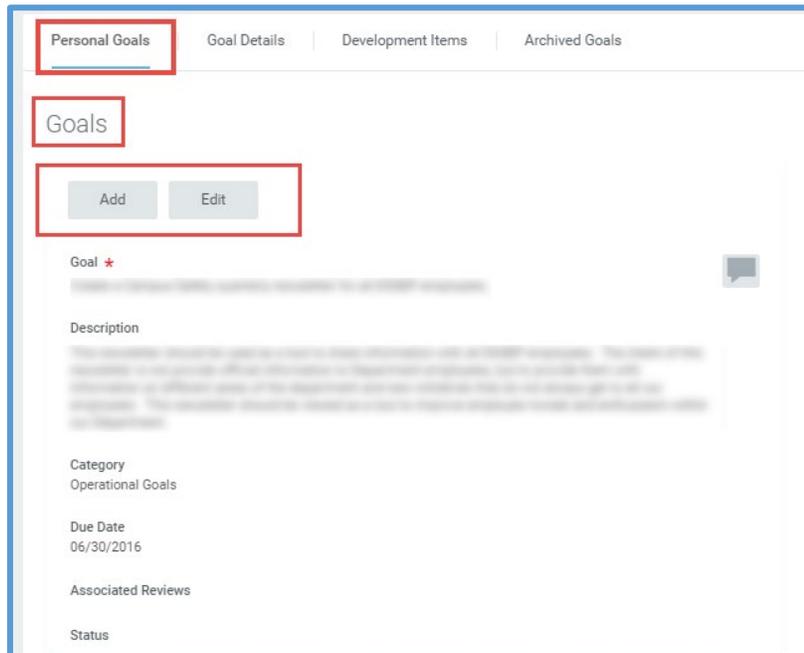


Step 5

The newly assigned goal will be placed in the **Goals** section under *Personal Goals* tab and can be edited from this section. If no goals are added, the fields will be empty.

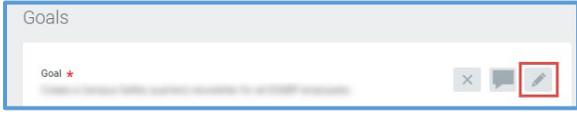
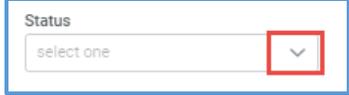
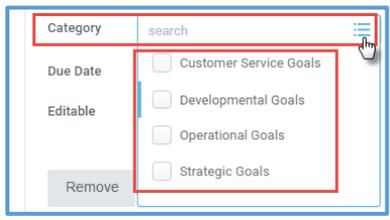
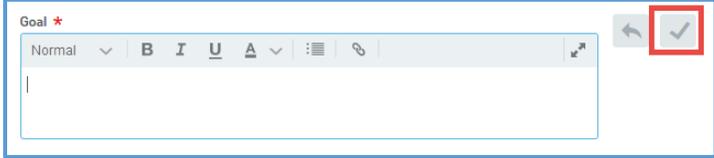
To add a personal goal, click **Add**
To update the status of a goal, click **Edit**

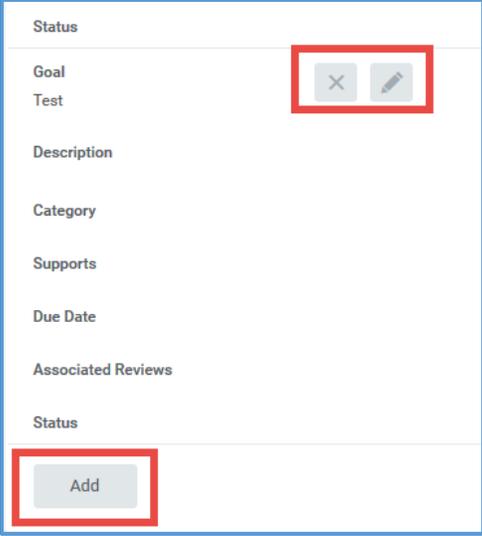
Note: The newly assigned goal will always show up under Goals section once sent from a supervisor. Goals listed here indicate that a status has not been selected by the employee(s). Once a status has been updated, the goal will move from the **Goals** section to the applicable section.

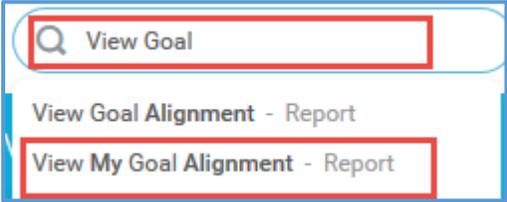
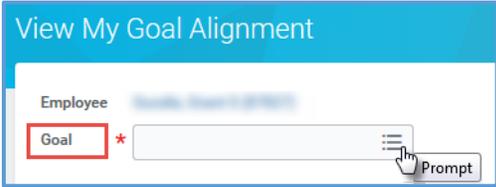
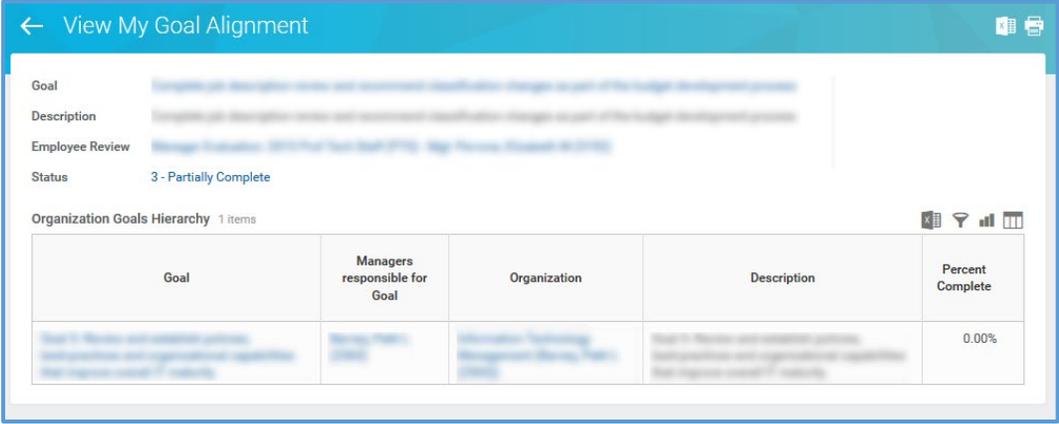


Step 6

Edit Goal screen appears:

Select	To												
<p>Edit</p>	<p>Edit the status of a goal (Note: As you work towards completing the assigned/personal goal(s), you can periodically return to edit the status to show the completion rate of a specific goal)</p> <ol style="list-style-type: none"> 1. Click the pencil   <ol style="list-style-type: none"> 2. Scroll down to Status and click the drop down prompt  and select a status  <ol style="list-style-type: none"> 3. Click Submit 												
<p>Add</p>	<p>Add a Personal Goal</p> <ol style="list-style-type: none"> 1. Complete fields as follows: <table border="1"> <thead> <tr> <th>Field</th> <th>Description</th> </tr> </thead> <tbody> <tr> <td>Goal (required)</td> <td>Add a goal</td> </tr> <tr> <td>Description</td> <td>This is an optional field, you may enter a description in the field or leave blank</td> </tr> <tr> <td>Category</td> <td>Click the prompt  and select <i>either</i> one or multiple categories</td> </tr> <tr> <td>Due Date</td> <td>Enter a due date</td> </tr> <tr> <td>Status</td> <td>Click the drop down prompt  and select a status</td> </tr> </tbody> </table>  <ol style="list-style-type: none"> 2. Click the  to save your personal goal  <ol style="list-style-type: none"> 3. Click Submit 	Field	Description	Goal (required)	Add a goal	Description	This is an optional field, you may enter a description in the field or leave blank	Category	Click the prompt  and select <i>either</i> one or multiple categories	Due Date	Enter a due date	Status	Click the drop down prompt  and select a status
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<p>Step 7</p>	<p>To add another goal, click Add To Remove a goal, click  To Edit a goal, click </p>	
<p>Step 8</p>	<p>Once all goals are added (if applicable) and status has been modified, click Submit</p> <p>Note: If a personal goal is added by the employee, it will route to manager for approval. As you work towards completing the assigned/personal goal(s), you can periodically return to edit the status to show the completion rate of a specific goal.</p>	

View My Goal Alignment											
View how an organization goal aligns with other organization goals in the same supervisory hierarchy. You can also drill down to see who is aligned with a specific goal.											
Step 1	<p>Type View My Goal Alignment in the search field and select View My Goal Alignment - Report</p> 										
Step 2	<p>View My Goal screen appears, click the prompt  in the Goal field to select a goal</p> 										
Step 3	Click OK										
Step 4	<p>The next screen appears with the Organization Goal Hierarchy</p>  <table border="1" data-bbox="380 1297 1377 1451"> <thead> <tr> <th>Goal</th> <th>Managers responsible for Goal</th> <th>Organization</th> <th>Description</th> <th>Percent Complete</th> </tr> </thead> <tbody> <tr> <td>[blurred]</td> <td>[blurred]</td> <td>[blurred]</td> <td>[blurred]</td> <td>0.00%</td> </tr> </tbody> </table>	Goal	Managers responsible for Goal	Organization	Description	Percent Complete	[blurred]	[blurred]	[blurred]	[blurred]	0.00%
Goal	Managers responsible for Goal	Organization	Description	Percent Complete							
[blurred]	[blurred]	[blurred]	[blurred]	0.00%							
Step 5	<p>Click on Workday to return to the home page</p> 										



FREQUENTLY ASKED QUESTIONS

How do I know or get notified that my supervisor has set a goal for me?

Managers should discuss goal setting prior to inputting employee goals into the Workday Manage Goals Program. There are four categories of goals that managers should use when discussing and developing goals (Customer Service, Developmental, Operational and Strategic Goals). Once a manager has **added** a goal using either the **Add Employee** or **Cascading** goal feature a notification will be sent to the employee notifying them that a goal was established.

Where do I find the "notification" that a goal has been sent to me from my manager?

See [step 2](#)

Maintain Goal Status

Set statuses of goals. Goals will appear in this section once they have been **Added to Employees** or **Cascaded to Employees**. Note: Goals listed here indicate that a status has not been selected by the employee(s). Once a status has been updated, the goal will move from the **Goals** section to the applicable section.

There are four categories available to maintain goal statuses.

- Not Applicable – May apply if a goal was *added* or *cascaded* to an employee and is not required by the employee to take action on. If this status is selected the goal will move from the **Goals** section to the **Completed** category.
- Not Started – Once an employee receives a goal, the employee can set a **Not Started** status of that goal. If this status is selected the goal will move from the **Goals** section to the **Not Started** category.
- Partially Complete – This status should be selected once a goal has been started by an employee(s). If this status is selected the goal will move from the **Goals** section to the **In-Process Goals** category.
- Successfully Completed – This status should be selected once a goal has been completed by an employee(s). If this status is selected the goal will move from a current status (I.e. not started or in-process) to the **Completed Goals** category

What are Personal or Employee Goal?

Personal or employee goals are goals assigned to individual employees.