

ENTERING GOALS INTO WORKDAY

Adding goals in Workday is a great way to establish and track progress during the course of the review period. There are three types of goals you can add to your profile in Workday: Organization Goals, Performance Goals and Development Goals. All three kinds will be included for discussion between employee and supervisor in the next performance review.

Organization Goals are enterprise-wide goals that support the mission of the university, and will be **assigned by the president of the university**.

Performance Goals are objectives you will accomplish in the coming year in your specific role at Saint Leo University. **Supervisors assign these goals** to their direct reports.

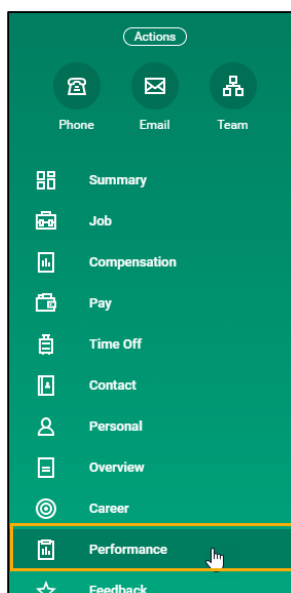
Development Goals are **individual goals** that describe the ways in which you would like to improve this next year. Consult first your previous performance review for direction with these goals.

Adding Goals to Your Profile

Employees are required to add one individual Development goal in Workday. Development goals are areas of performance to improve upon over the performance period. Development Goals will appear on Annual Performance Reviews.

Follow the steps below to add an individual Development Goal in Workday.

1. Log on to Workday.
2. Navigate to your profile by clicking your picture and selecting My Profile. Then **select** the **Performance** menu option.

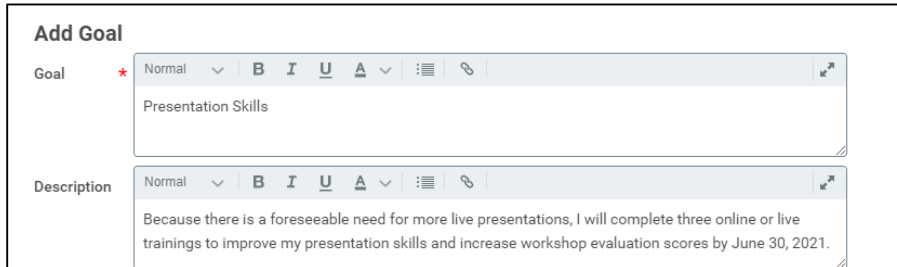


(Continued)

3. Click .

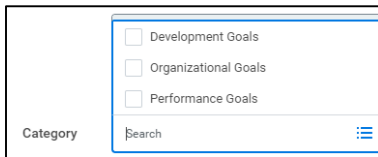
4. Click .

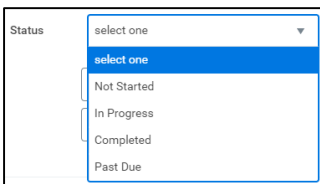
5. Enter goal details along with a description.

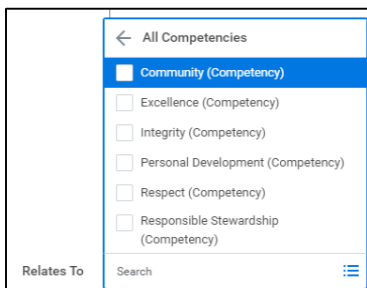


NOTE: The goal field is the title of the goal, while the **description** makes the goal “SMART” (Specific, Measurable, Attainable, Relevant, and Time-bound), as seen in the example above.

6. Using the dropdown menus, select the following:

a. **Category**  - choose Development Goals.

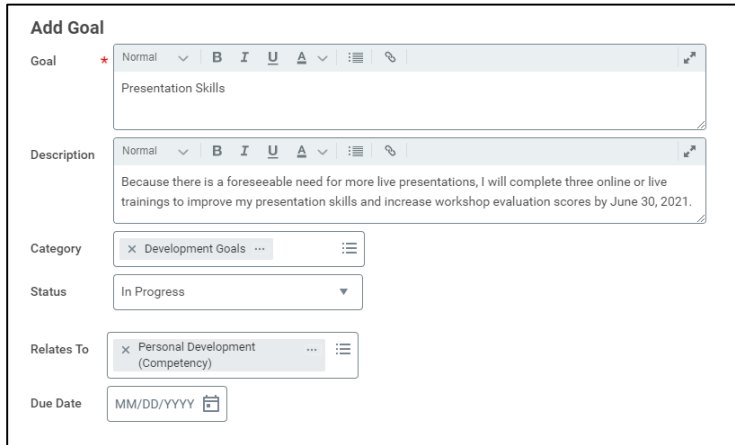
b. **Status**  - select the status of the goal.

c. **Relates To**  - you have the option to select the Core Value that most closely relates to your individual goals.

d. **Due Date** should be no later than the end of the performance period (6/30/21).

(Continued)

7. Click  when finished.



The 'Add Goal' form contains the following fields:

- Goal:** A text area with a rich text editor toolbar. The text 'Presentation Skills' is entered.
- Description:** A text area with a rich text editor toolbar. The text 'Because there is a foreseeable need for more live presentations, I will complete three online or live trainings to improve my presentation skills and increase workshop evaluation scores by June 30, 2021.' is entered.
- Category:** A dropdown menu with 'Development Goals' selected.
- Status:** A dropdown menu with 'In Progress' selected.
- Relates To:** A dropdown menu with 'Personal Development (Competency)' selected.
- Due Date:** A date picker showing 'MM/DD/YYYY'.

8. By clicking **Submit** your manager receives a **Manage Goals** notification.

ASSIGNING PERFORMANCE GOALS

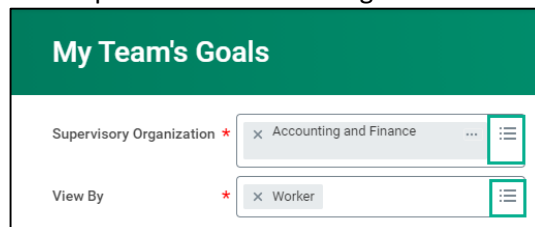


- It is each supervisor's responsibility to assign goals to their direct reports at the beginning of the performance period.

Supervisors can add goals to individual team members and/or their entire team at once. Follow the steps below to add goals to your entire team and/or several team members at once.

Manager assigns goals


- Log on to Workday.
- Type **My Team's Goals**.
- Workday will automatically populate the **Supervisory Organization** and the **View By** fields by default. Use the dropdown menus to change these selections if necessary.



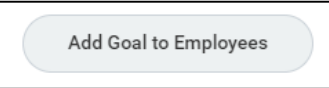
The 'My Team's Goals' form shows the following fields:

- Supervisory Organization:** A dropdown menu with 'Accounting and Finance' selected.
- View By:** A dropdown menu with 'Worker' selected.

(Continued)

4. Click  to view the My Team's Goals page where each of your employees, along with their goals will be listed.

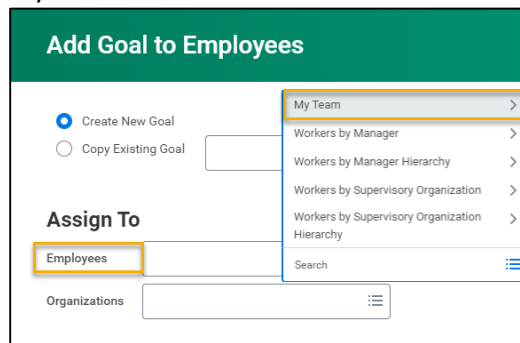
5. Click



6. From the Add Goal to Employees page, leave the **Create New Goal** default selection.

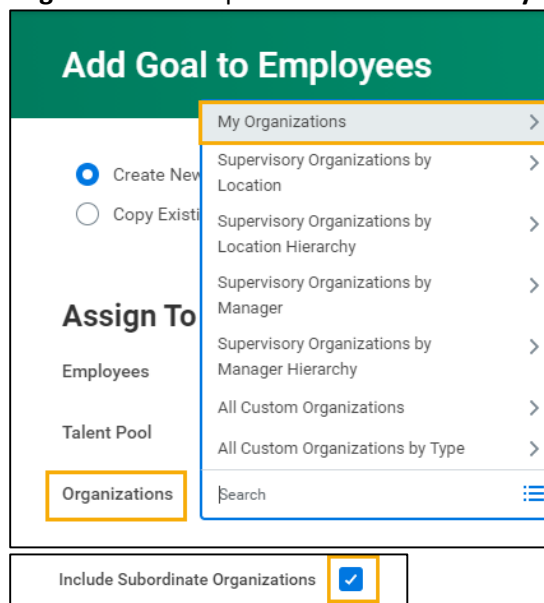
7. There are two ways to assigns goals to your team:

- a) Use the **Employees** dropdown menu and select **My Team**, and select employees individually.



The screenshot shows the 'Add Goal to Employees' page. The 'Create New Goal' radio button is selected. The 'Assign To' section has the 'Employees' dropdown menu open, showing a list of options: 'My Team', 'Workers by Manager', 'Workers by Manager Hierarchy', 'Workers by Supervisory Organization', and 'Workers by Supervisory Organization Hierarchy'. The 'My Team' option is highlighted. Below the dropdown is a search bar and a button with a list icon.

- b) Use the **Organizations** dropdown menu and **select your organizations**.

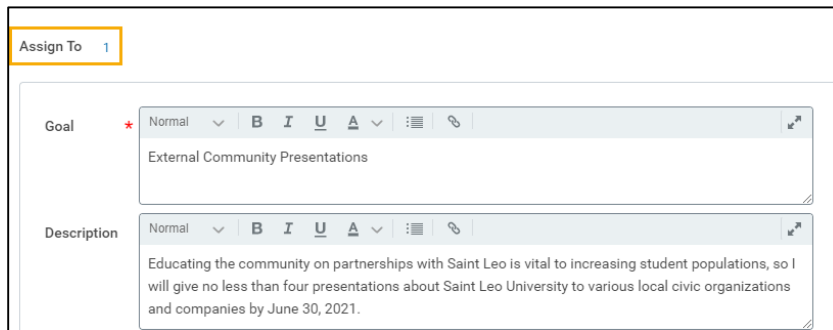


The screenshot shows the 'Add Goal to Employees' page. The 'Create New Goal' radio button is selected. The 'Assign To' section has the 'Organizations' dropdown menu open, showing a list of options: 'My Organizations', 'Supervisory Organizations by Location', 'Supervisory Organizations by Location Hierarchy', 'Supervisory Organizations by Manager', 'Supervisory Organizations by Manager Hierarchy', 'All Custom Organizations', and 'All Custom Organizations by Type'. The 'My Organizations' option is highlighted. Below the dropdown is a search bar and a button with a list icon. At the bottom of the page, there is a checkbox labeled 'Include Subordinate Organizations' which is checked.

- ! Be careful when selecting by Organizations because **Include Subordinate Organizations** is selected by default. Deselect this option if you only want your direct reports to be assigned this goal.

(Continued)

8. Add the **Goal** title and goal **Description** details. Be sure you are entering SMART (Specific, Measurable, Attainable, Relevant, and Time-bound) goals.

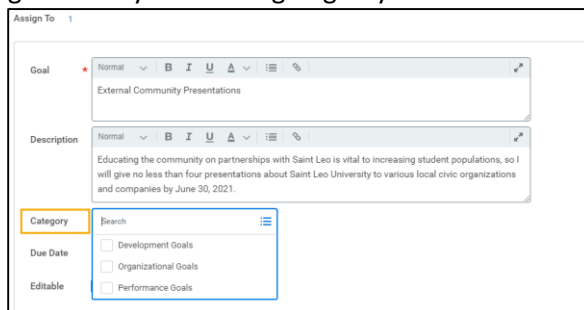


The screenshot shows a form with a top section labeled 'Assign To' containing the number '1'. Below this are two text input fields. The first field is labeled 'Goal' and contains the text 'External Community Presentations'. The second field is labeled 'Description' and contains the text 'Educating the community on partnerships with Saint Leo is vital to increasing student populations, so I will give no less than four presentations about Saint Leo University to various local civic organizations and companies by June 30, 2021.' Both fields have a rich text editor toolbar above them.



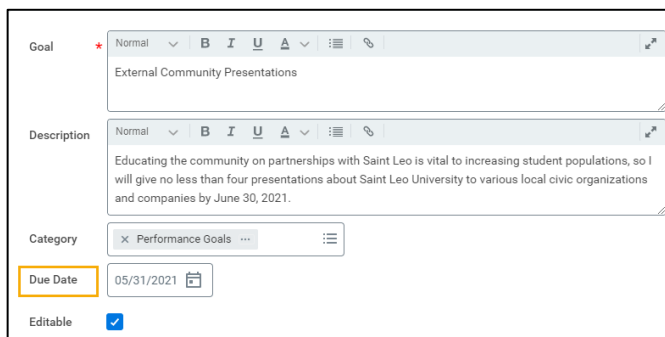
NOTE: The **Assign To** field located at the top of the page indicates the **number of users selected** to receive the goal. The number is also an active link, and when clicked, the list of users receiving the goal assignment will display.

9. Select the appropriate category for the goal assignment by clicking the **Category** dropdown menu. The goals that you are assigning to your team will be **Performance** goals.



The screenshot shows the same form as before, but with the 'Category' dropdown menu open. The menu has a search bar and three options: 'Development Goals', 'Organizational Goals', and 'Performance Goals'. The 'Performance Goals' option is highlighted with a blue border.

10. Enter the **Due Date**.



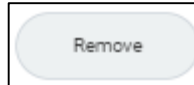
The screenshot shows the same form with the 'Category' dropdown set to 'Performance Goals'. The 'Due Date' field is highlighted with a yellow border and shows the date '05/31/2021' with a calendar icon. The 'Editable' checkbox is checked.

- The **Editable** checkbox is **checked by default**. Deselect this option if you do not want to allow edits.

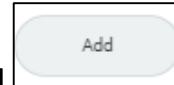
(Continued)



NOTE: You can **Remove**



and/or **Add**



goals from this page by using these buttons.

11. Use the navigational buttons at the bottom of the page to perform the following actions:

- a) **Submit** – Assigns the goal to selected employees
- b) **Save for Later** – Saves the goal in draft status only visible to you
- c) **Cancel** – Removes the goal from Workday

12. By clicking **Submit**, employees will receive a **Manage Goals** notification.

Employee Goal Notification

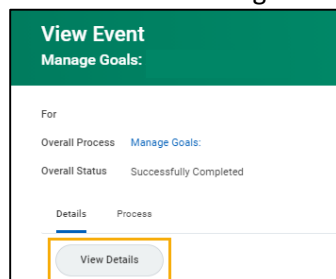
Once a goal is assigned, employees receive a Workday notification from which they can view the assignment.

1. Log on to Workday and click the notification  icon.

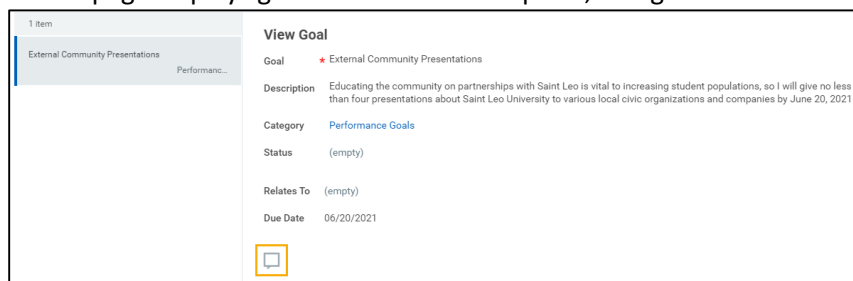
2. Click the **Manage Goals** link on the notification.

(Continued)

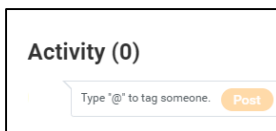
- Click **View Details** button to navigate to the View Goal page.



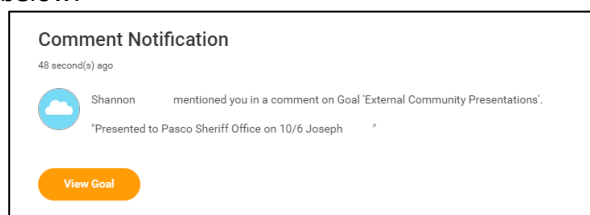
- The **View Goal** page displays goal details and description, along with due dates.



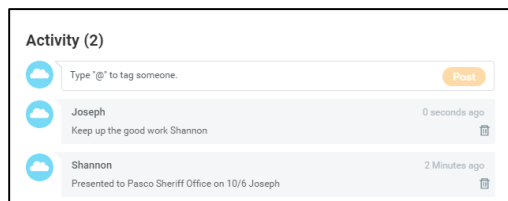
- Click the **Activity** icon  to **enter comments** and/or **goal progress** details.



- Once data is entered in the Activity box, use **@** to **tag** and **notify** your supervisor of goal progress. **Tagged** users will receive a **Comment Notification** like the one shown below:



- Upon receipt of the Comment Notification, tagged users can click the View Goal button to review goal details, along with the Activity stream details where they have the option to enter additional data.



- Once a comment has been added to the Activity box, the image changes to include



several lines in the middle of the icon indicating verbiage is available.

(Continued)

6. **Activity data** can be removed by clicking the Activity icon and selecting the **trash can** icon next to the comment.



NOTE: All goals whether assigned or otherwise are accessed on the **Performance** page on your **Workday Profile**. Like the example shown below, goals are listed by due date, and as allowable, they can be edited by selecting the Edit button.

