



Workday: Add, Edit, and Approve Goals for Performance Review (Manager/Talent Analyst)

Overview

This job aid outlines the steps for a Manager to add, edit, and approve goals as part of the performance review process in Workday.

Prerequisites:

- None

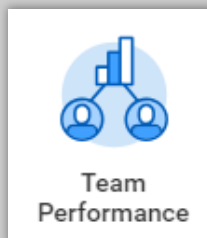
Important Information:

- For the goals to show in the evaluation:
 - The goal due date must be between 4/1/2018 and 3/31/2019
 - Goals added by Employees or Talent Analysts must be approved by the Manager
- Goals added by the Manager are automatically approved
- Managers can edit goals for their direct reports, Talent Analysts cannot edit or approve goals
- Goals must be approved by the Manager to be edited by the Employee

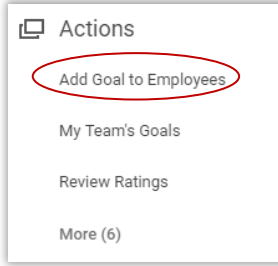
Add Goals (Manager):

1. From the Workday Home page, click the **Team Performance** Worklet.

The Team Performance dashboard may take a minute to load. A blue loading bar will display at the bottom of the screen until the page is fully loaded.



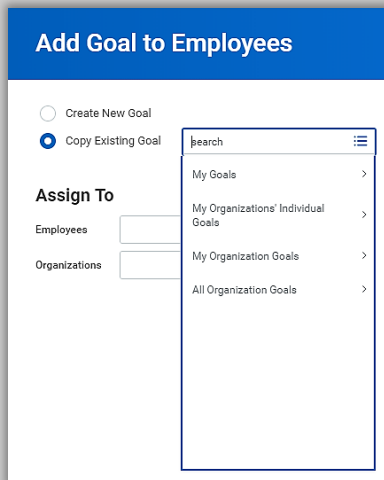
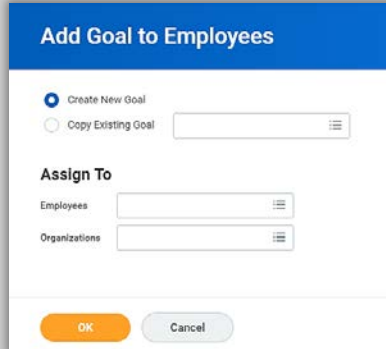
2. In the **Actions** menu, click **Add Goal to Employees**.



3. Decide if you are creating a new goal, or if you want to copy an existing goal.


Create New Goal will allow you to create a goal once you select the Employee(s) you are assigning the goal to

Copy Existing Goal will allow you to copy a goal from your own goals, or from someone who reports to you



4. Decide who to assign the goal(s) to: specific Employees or an entire Organization.

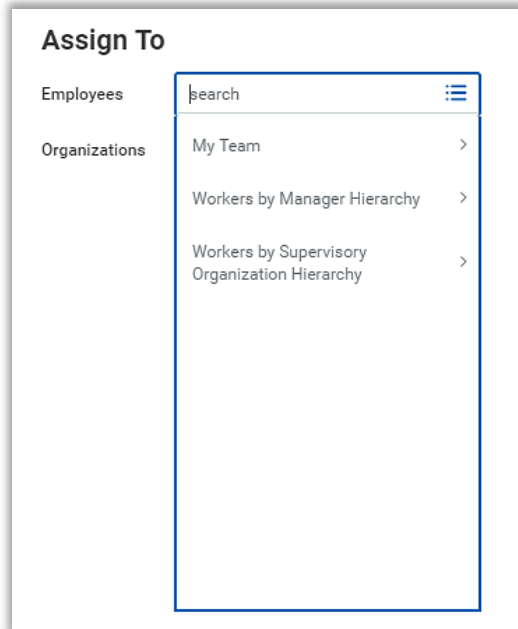
*Click in the **Employees** search box to search employees in your team, workers by a manager, workers by a manager hierarchy, or workers by supervisory organization hierarchy*



Assign To

Employees

Organizations



Assign To

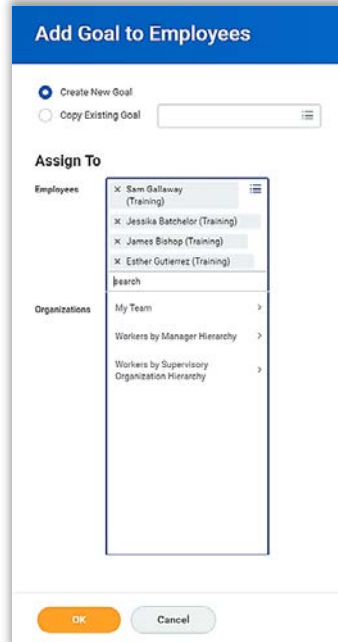
Employees

Organizations

- My Team >
- Workers by Manager Hierarchy >
- Workers by Supervisory Organization Hierarchy >

Tip: It may be faster to type an employee name or supervisory organization in the search bar rather than use the drop down menu.

5. After selecting the Employee(s) or Organization(s) to add goals, click **OK** in the bottom left corner.



6. Enter the Goal, Description and Due Date. Then determine whether or not you want to be able to edit the goal.

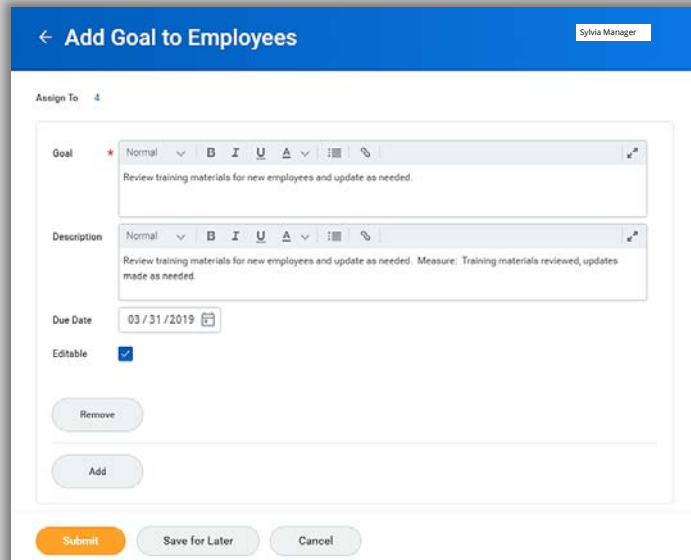
Assign To: number of employees you selected to assign the goal (this is a hyperlink you can click on to view the employees the goal will be assigned to)

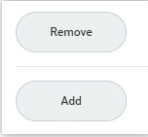
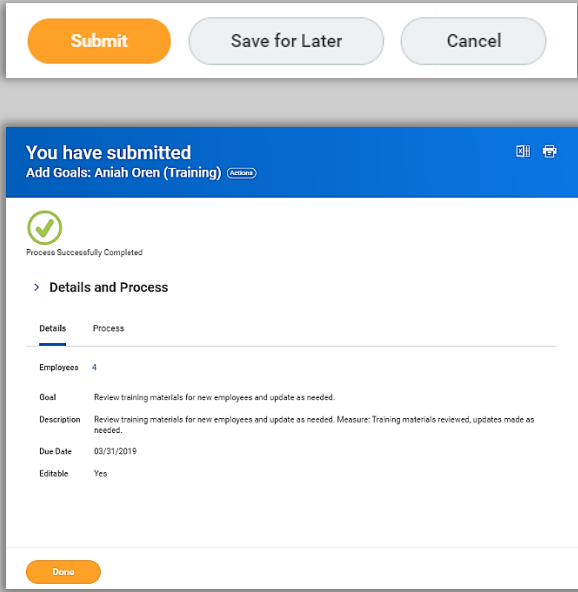
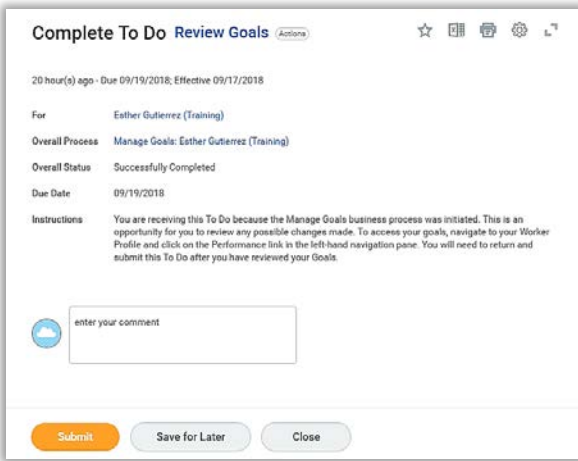
Goal: Enter the Goal

Description: Enter the Goal Description

Due Date: Enter the Due Date (the due date must be in the performance review period – typically April 1 through March 31 – to pull to the performance evaluation)

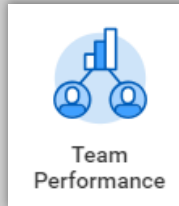
Editable: Check this box to be able to edit the goal. If the box is not checked, the goal can be deleted, but no edits are allowed once the goal is submitted



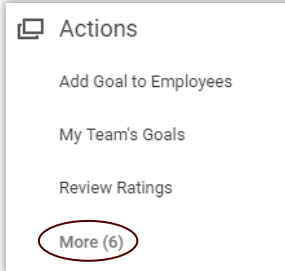
<p>7. Click Add to add another goal, or click Remove to delete a goal.</p>	
<p>8. When all desired goals are entered, click Submit in the bottom left corner.</p>	
<p>9. Employees will receive an Inbox item to review goals.</p> <p><i>This prompts employees to view the assigned goal(s). An employee can access their goal(s) by clicking on the Performance worklet on the Workday homepage, then clicking Goals in the View item list (See Add and Edit Goals Job Aid – Employee). Once the goal(s) have been reviewed, the employee can click Submit on the item in their Inbox.</i></p>	

Edit Goals (Manager):

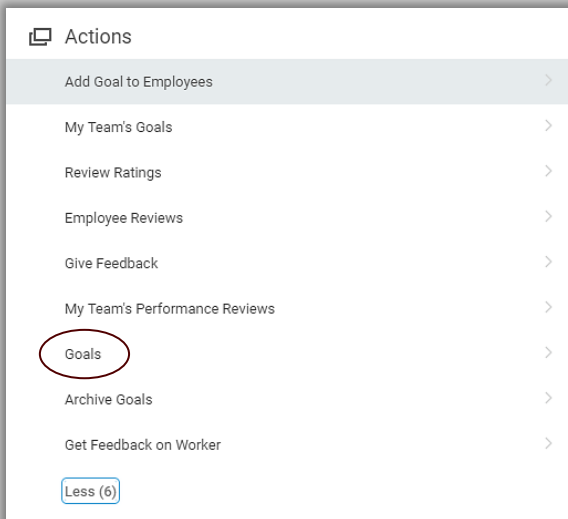
1. From the Workday Home page, click the **Team Performance** Worklet.



2. Click **More** in the Actions menu.



3. Click **Goals**.



4. The employees you manage in Workday will be listed with their goals.

You can view **By Worker** or **By Goal** using the tabs at the top of the list.

My Team's Goals



Add Goal to Employees

By Worker By Goal

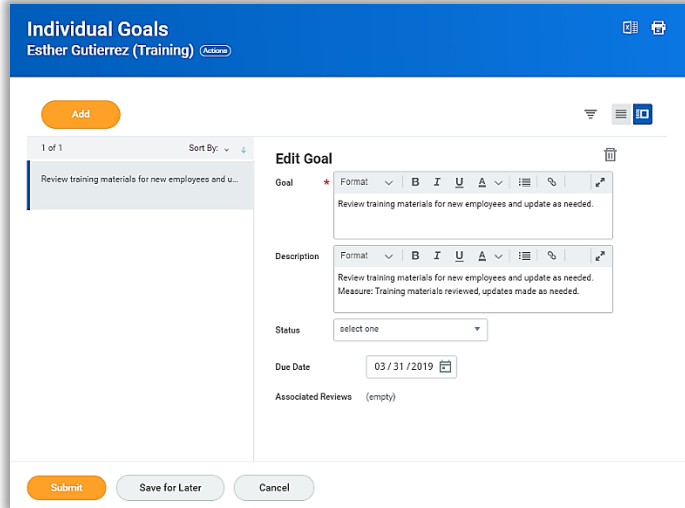
By Worker 3 items

Worker	Goal Section	Goal	Description	Status	Due Date	Completed On	Assigned Reviewer
Rafael Balderas (Training)	EDIT	Review training materials for new employees and update as needed.	Review training materials for new employees and update as needed. Measure: Training materials reviewed, updates made as needed.		03/31/2019		
James Bishop (Training)	EDIT	Review training materials for new employees and update as needed.	Review training materials for new employees and update as needed. Measure: Training materials reviewed, updates made as needed.		03/31/2019		
Jessica Gutcher (Training)	EDIT	Complete six hours of diversity training.	Complete six hours of diversity training. Measure: Diversity training completed.	In Progress	03/31/2019		

5. Click the **Edit** button next to a goal to open the editor.

Worker	Goal Section	Goal
 Esther Gutierrez (Training)		Complete safety training. - (Awaiting Approval)


6. Edit the goal as desired, and click **Submit** to save your changes.



7. Editing a goal for an Employee will generate an Inbox item for the Employee to review their goal(s).

You have submitted
 Manage Goals: Esther Gutierrez (Training) [Actions](#)

Up Next

 Esther Gutierrez (Training)

To Do: Review Goals
 Due Date: 09/20/2018

Do Another
[Archive Goals](#)

> **Details and Process**

Approve Goals (Manager):

1. Click the **Inbox** icon in the top right corner of Workday.



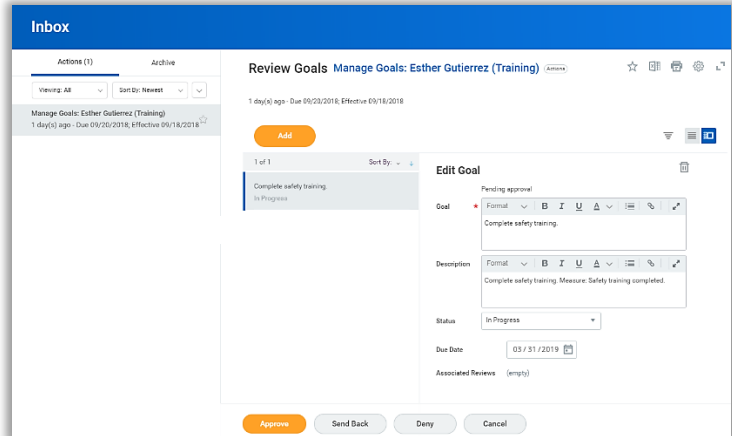
2. When an Employee adds a goal, it is routed to the Manager's Inbox for approval.

In the Inbox, you can edit the goal by clicking in the text box for Goal, Description, Status or Due Date

You can delete the goal by clicking on the waste bin icon in the top right corner

Actions available are:

- *Approve: Click to approve the goal*
- *Send Back: Click to send the goal back to the employee for changes*
- *Deny: Click to deny the goal*
- *Cancel: Click to leave the Inbox item and come back later*



3. **Approve** the goal to complete the Inbox item.

