Overview

This job guide outlines the steps for a Talent Analyst to Add Goals for Employees or Supervisory Organizations (Sup Org) in Workday.

Prerequisites:

- None

Important Information:

- For the goals to show in the evaluation, the goal due date must be between 04/1/2019 and 03/31/2020
- Goals added by the Employee or Talent Analyst must be approved by the Manager
- Talent Analyst can add goals for all employees in the Supervisory Organization(s) they have permission to access.
- Talent Analysts cannot edit or approve goals.
- Goals added by the Manager are automatically approved.
- Screen Images are representational only. The actual screen image may appear differently.
### Add Goals (Talent Analyst)

<table>
<thead>
<tr>
<th>Step</th>
<th>Screenshot</th>
</tr>
</thead>
</table>
| 1. From the Workday Home page, click the **Team Performance** Worklet.  
**Note:** The Team Performance dashboard may take a minute to load. The blue loading bar at the bottom of the screen indicates when the page is fully loaded. | ![Screenshot](image1.png) |
| 2. The Team Performance page will display. | ![Screenshot](image2.png) |
| 3. On the Actions menu, click **Add Goal to Employees.** | ![Screenshot](image3.png) |
**Job Guide: Talent Analyst Add Goals**

<table>
<thead>
<tr>
<th>Step:</th>
<th>Screenshot:</th>
</tr>
</thead>
<tbody>
<tr>
<td>4. The Add Goal to Employees page will display.</td>
<td><img src="image" alt="Add Goal to Employees" /></td>
</tr>
</tbody>
</table>

**Add Goal to Employees**

- Create New Goal
- Copy Existing Goal

**Assign To**

- Employees
- Organizations

**Add Goal to Employees**

- Create New Goal
- Copy Existing Goal

**Assign To**

- Employees
- Organizations

5. To enter a new goal, select **Create New Goal**.

To duplicate a goal, select **Copy Existing Goal**. Then select the location of the goal to copy.
6. Goals may be assigned to individual employees or the entire Sup Org.

   A. To assign to an individual employee, in the Employees search box, type the Employee Name. Hit Enter. If assigning to multiple employees type each name individually and hit Enter.

   B. To assign to the entire Sup Org in the Organizations search box type the Managers Name and hit Enter.

   C. When assigning goals using the Sup Org, the Include Subordinate Organizations box will appear. Select this box to assign the same goal all Sup Orgs under that Manager.

7. After selecting the Employee(s) or the Sup Org, click OK.

   Note: This job guide will show assigning goals to individual employees.
**Step:**

8. Enter the Goal, Description and Due Date. Determine if the goal should be editable in the future.

A. **Assign To:** Number of employees selected to assign the goal (this is a hyperlink that allows viewing the employee(s) receiving the goal.

B. **Goal:** Enter the name of the goal.

C. **Goal Description:** Enter the detailed description of the goal.

D. **Due Date:** Enter the date the goal should be completed. The due date must be in the performance review period April 1 through March 31.

E. **Editable:** Check this box to be able to edit the goal. If the box is not checked, the goal cannot be edited after approval. The goal may be deleted and reentered.

**Note:** The Supports field is not currently used.
9. **Remove**: Deletes the displayed goal.

**Add**: Allows additional goals to be entered for the same employee(s) or Sup Org as the previously entered goal.

Click **Submit** when all goals are entered.

10. After submitting, the Process Successfully Completed screen will display.

To see the detail of the process, click **Details and Process**. Open the **Process** tab. Process History displays the status of each step in the business process.

To check the process status at a later date, use the Inbox Archive tab and select the process email. Open the **Process** tab to view the status of each step in the process.

Click **Done**.
### Step:

11. The Manager(s) will receive an Inbox **To Do** to review and approve the goal(s).

Goals entered using the Supervisor Organization may route to multiple Managers.

**Note:** Talent Analysts cannot Approve goals.

12. After the Manager approves the goal, the Employee(s) will receive an Inbox **To Do** to review and submit the goal(s).

**Note:** Talent Analysts cannot Edit goals.

**Once the goal(s) is approved by the Manager and submitted by the Employee, the Add Goal by Talent Analyst business process will be complete.**