Manage Team Goals
Workday Job Aid for Leaders

Overview

Use this job aid as a resource to view and approve your team's goals and to create goals for your team.

Approve Team Goals

When a direct report enters goals, a leader receives a task under **My Tasks** to review and approve them.

1. Two options are available to view and approve a direct report's goal.
   a. **First Option**: From the **Home** screen/dashboard, click My Tasks icon found at the top right-hand corner of the page

   Locate and select the **Manage Goals** task.

   b. **Second Option**: From the Home screen/dashboard, scroll down to the **Awaiting Your Action** my tasks items list.

   Awaiting Your Action

   Manage Goals: Elaine Doong
   Inbox - 20 second(s) ago

2. Click on the awaiting task item for action.
3. Review the following details for the goal:
   a. **Goal**
   b. **Description**
   c. **Status**
   d. **Category**
   e. **Organizational Alignment**
   f. **Due Date**
4. Options after reviewing the details are:

   Send Back
   Cancel

   •••   Deny   Approve

   a. **Approve** – this will unlock the Goal card from Pending Approval to In Progress
   b. **Send Back** – this will return the goal back to the direct report with a comment describing the reason and/or instructions to update the goal.

   Send Back

   To   * × Elaine Doong – Revise Goals

   Reason * TEST

   Submit   Cancel

- Click Submit. This returns the goal to the direct report for action.
- Direct report updates goal and submit.
- Returns to leader for approval.

c. **Deny** – This option will terminate the entire business process and requires a comment explaining the reason.

Deny

Selecting Deny may terminate the entire business process. Please enter your reason for terminating the business process below.

Reason * |

(Submit) (Cancel)

d. Click **Submit**
e. **Cancel** – will confirm your desire to discard changes or to continue

Discard Changes?

Are you sure you want to discard changes made on this page?

(**Discard**) (Continue)

Add a Goal to Employees (Direct Report)

Follow these steps to add goals to **one or more** of your direct reports.

1. From a leader's **Home** screen/dashboard, click on Menu found at the left side of the screen/dashboard.
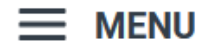
≡ **MENU**

2. Scroll down the applications menu list to Team Performance and click on the application.

Team Performance

3. On the right-side of the new screen, you have a box with options of Actions.

▢ Actions

Add Goal to Employees

My Team's Goals

Archive Goals

More (6)

- Click Add Goal to Employees
- Option to Create New Goal or Copy Existing Goal

Add Goal to Employees

- ○ Create New Goal
- ○ Copy Existing Goal [☰]

Assign To

Employees [☰]

Organizations [☰]

[OK]   (Cancel)

- Assign to – type in employee name(s)
- Click OK.
- Enter relevant information into text field boxes. Red asterisk (*) designates a required field to complete.

Add Goal to Employees

Assign To   1

Goal	*	Format ∨ B I U A ∨ ☰ ✎
Description	*	Format ∨ B I U A ∨ ☰ ✎
Category		[☰]
Organization Alignment	*	[☰]
Due Date		[MM/DD/YYYY 📅]
Editable		☑
Track By		select one ▾

(Remove)

(Add)

- Check Editable if allowing employee to edit OR remove the check so the employee is unable to edit.
- Click Add to enter another goal, if needed.
- Otherwise, Click Submit.
- Confirmation that the goal has been added.

Or you can use the following steps to enter goal(s) for one direct report.

1. Type employee name in the Workday search bar.

[🔍 Search]

2. Select the name from the list of employees.
3. Use the Actions button from the left (purple) navigation pane of the employee's profile.

[Actions]

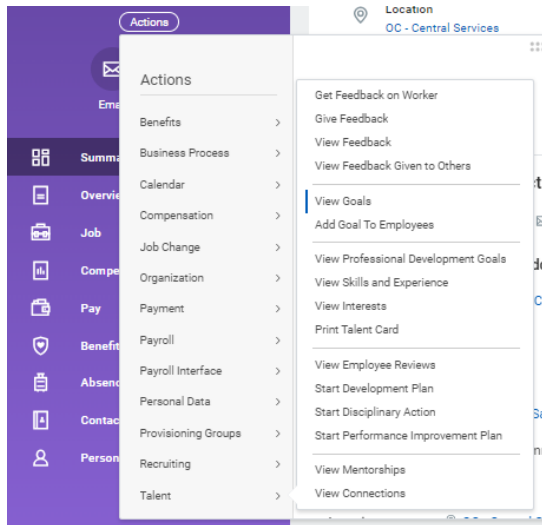4. Select View Goals from the Actions list.

Actions

Frequently Used

View Goals

OR

5. If you are a first-time user, from Actions, place your cursor

on the Talent, a right menu expands and from there you can click on view goals.

6. Click the Create Goal for Worker button.

Create Goal for Worker

7. Enter data into relevant text field boxes. Red asterisk (*) designates a required field.

8. Click Submit.
9. Confirmation of goal submitted.
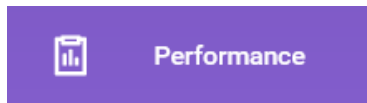
View Individual Goals

Follow these steps to view an employee's individual goals.

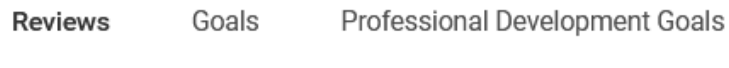1. Navigate to the Employee's Profile by using the Search bar.

2. Select the name from the list of employees.
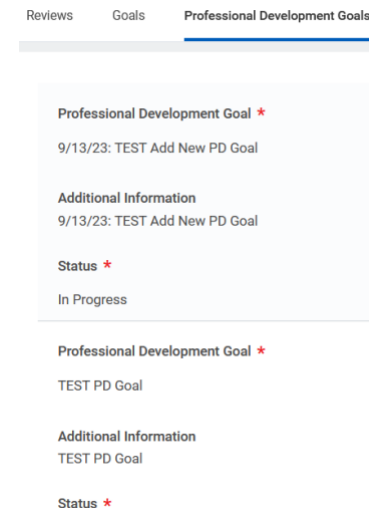3. Use the left (purple) navigation pane, scroll down, and Click

on Performance.

Performance

4. From the tabs across the top of the screen, click on one of the following goal options:

Reviews   Goals   Professional Development Goals

a. **Individual Goals** – You can view goal cards in different steps of the process: Not Started, In Progress, Completed, Cancelled, Not Applicable.

Individual Goals   Archived Goals

> **Not Started**

> **In Progress**

> **Completed**
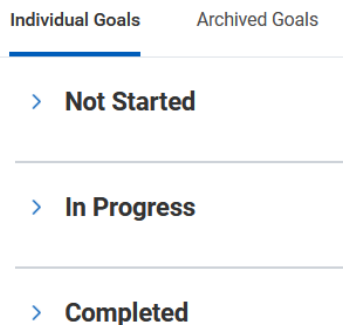
b. **Professional Development Goals**: if goals were entered, a list of professional development goals will be listed.

Reviews   Goals   **Professional Development Goals**

Professional Development Goal *

9/13/23: TEST Add New PD Goal

Additional Information
9/13/23: TEST Add New PD Goal

Status *

In Progress

Professional Development Goal *

TEST PD Goal

Additional Information
TEST PD Goal

Status *

View Team Goals

Follow these steps to view goals for the entire team.

1. From a leader's **Home** screen/dashboard, click on the Menu found at the left side of the screen/dashboard.
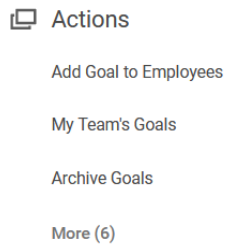
☰ **MENU**

2. Click the **Team Performance** application.

3. Click My Team's Goals under the Actions list.

Actions

Add Goal to Employees

My Team's Goals

Archive Goals

More (6)

4. Enter your Supervisory Organization and select View by = Worker.

My Team's Goals   ✕

Supervisory Organization * [   ]

View By   * [✕ Worker   ]

                              Cancel   OK

5. Click OK.
6. A table listing your employee and their goals will appear.

Worker	Goal Section	Goal	Description	Organization Alignment	Category	Status	Due Date

- You can export this data to an Excel spreadsheet OR use the 2-arrows to expand the table view.

- Exporting data may take some time.
- Use the 2-arrows again to return the table to its original size.