Quick Reference Guide: View and Edit Goals

**Keep in mind**
- All goals you set in Workday will route to your manager for approval.
- Both your manager and your manager’s manager will be able to view all of your goals.
- Your goals will be included in your annual performance review in Workday.

**Information Needed**
- A name for your goal
- A brief description of your goal

**Adding A Goal**

1. From your Workday home page, click on the Performance worklet.

2. Under **View** on the right-hand side of the screen, click on the button that says **Goals**.
3. Under the Individual Goals tab on the next page, you will see all of your existing goals. To add a new goal, click the Add button.

4. On the Edit Goals page, click the Add button again to enter a goal.

5. Under Goal, enter a short sentence or phrase that summarizes your goal.

6. Under Description, enter one or two sentences about your goal.

7. If you would like to tie your individual goal to one of your organization’s goals, please select the appropriate organizational goal in the Supports field. Please note, not all organizations will have goals available. If there are no fields to select, skip this step.

8. Milestones are concrete accomplishments that contribute to your goal. In order to add a milestone, check the Add Milestone check box and enter a name, due date, and status for the milestone.

9. You can add multiple milestones by clicking outside the Goals box once you are finished, then clicking on Add Milestone again.

10. When you are finished, click the green Submit button in the lower left-hand corner of the screen. Your goal will route to your manager for approval.
Editing Goals

1. From your Workday home page, click on the Performance worklet.

2. Under View on the right-hand side of the screen, click on the button that says Goals.

3. Under the Individual Goals tab, you will see all of your existing goals. To edit a goal, click on the Edit button above the goal you want to change.

4. On the Edit Goals screen, click on the Edit icon to edit your goal.

5. You can edit the Goal, Description, and Supports fields by clicking on them.

6. If you would like to view existing milestones, click on the number underneath View Milestones.

7. To add a milestone, check the Add Milestone check box and enter a name, due date, and status for the milestone. You can add multiple milestones by clicking outside the Goals box once you are finished, then clicking on Add Milestone again.

8. To edit or delete a milestone, select the milestone in the Edit Milestone field. This will allow you to change the milestone’s name, due date, or status, or select the Delete Milestone check box.

9. When you are finished, click the green Submit button in the lower left-hand corner of the screen. Your goal will route to your manager for approval.