

Quick Reference Guide: *View and Edit Goals***Keep in mind**

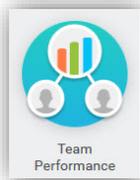
- Your direct reports will be able to see any changes that you make to their goals.
- Your manager will be able to view all goals for your direct reports.
- Any goals you set for your employees will be included in their annual performance reviews.

Information Needed

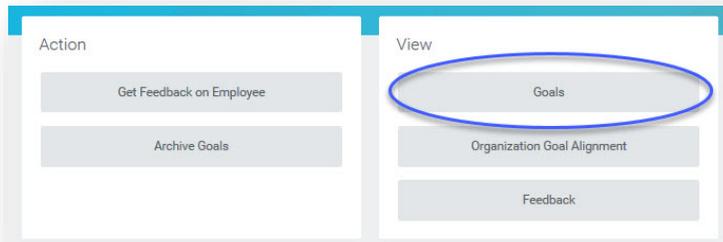
- The employee whose goals you are viewing or editing
- A name for the goal
- A brief description of the goal

Adding Goals for Direct Reports

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



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



3. This will display the report **My Team's Goals**. You can either view your team's goals broken down by employee:

By Employee

Current Goals 7 items

Photo	Employee	Goal Section	Goals			
				Individual Goals	Supports	Milestones
	Eleanor Roosevelt	Goals	Edit			
	Harry Truman	Goals	Edit		Sample goal #1	2
					Sample goal #2	
	John Adams	Goals	Edit		Sample goal #1	1
	Mary Todd	Goals	Edit			
	Woodrow Wilson	Goals	Edit		Sample goal #1	

Or scroll down to see them by goal:

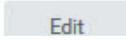
By Goal 5 items

Goal	Individual Goals				
	Assigned To		Goal	Supports	Milestones
Sample goal #2	Woodrow Wilson		Sample goal #2		3
Sample goal #1	Woodrow Wilson		Sample goal #1		
Sample goal #2	Harry Truman		Sample goal #2		
Sample goal #1	Harry Truman		Sample goal #1		2
Sample goal #1	John Adams		Sample goal #1		1

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4. To add or edit goals for an employee, click on the **Edit** button in their row.

Current Goals 7 items

Photo	Employee	Goal Section	Goals	
				Indivi
				Goal
	Eleanor Roosevelt	Goals		
	Harry Truman	Goals		Sample goal #1

5. To add a goal, click on the **Add** button



Goals

Goal *

Format B I U A

Description

Format B I U A

Supports

Associated Reviews
(empty)

Milestones
(empty)

View Milestones
0

Add Milestone

Edit Milestone

6. Under **Goal**, enter a short sentence or phrase that summarizes the goal.

7. Under **Description**, enter one or two sentences about the goal.

8. If you would like to tie this individual goal to one of your organization's goals, please select the appropriate organizational goal in the **Supports** field.

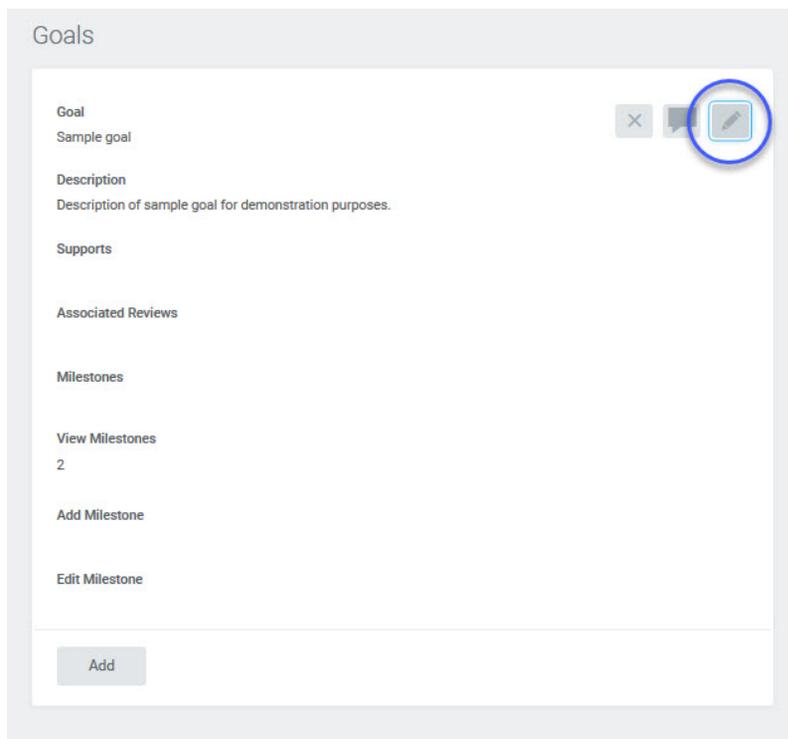
9. **Milestones** are concrete accomplishments that contribute to a goal. In order to add a milestone, check the **Add Milestone** check box and enter a name, due date, and status for the milestone.

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

11. When you are finished, click the green **Submit** button  in the lower left-hand corner of the screen.

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.



Goals

Goal
Sample goal

Description
Description of sample goal for demonstration purposes.

Supports

Associated Reviews

Milestones

View Milestones
2

Add Milestone

Edit Milestone

Add

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.