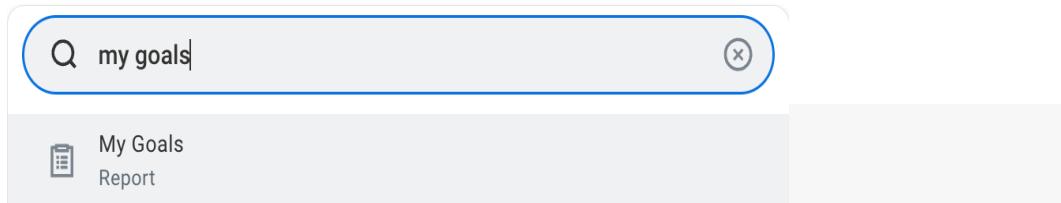


Creating and Assessing Goals in Workday

Creating Goals

1. Start by searching for **My Goals** in the Workday search bar.



A screenshot of a search bar with a magnifying glass icon. The text 'my goals' is typed into the search field. To the right of the search field is a small circular button with a close symbol (X). Below the search bar, a list of search results is shown. The first result is 'My Goals Report', which is preceded by a small icon of a document.

2. Make sure the Individual Goals tab is selected and click the **Edit Goal** button in the bottom left of each goal to edit current goals.



A screenshot of the 'My Goals' page in Workday. At the top, there are two tabs: 'Individual Goals' (which is selected, indicated by a blue underline) and 'Archived Goals'. Below the tabs, there is a list of goals. The first goal in the list has an 'Edit Goal' button highlighted in blue with a white border. The text 'Edit Goal' is also highlighted in blue.

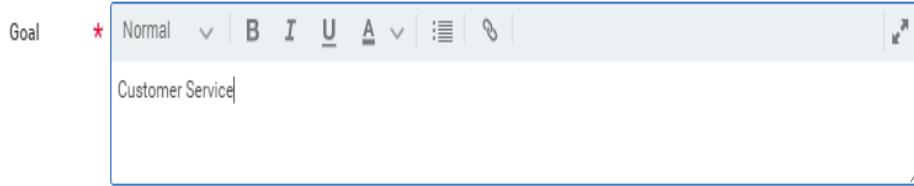
3. Select **Create Goal** button in the top left to add a goal.

My Goals

Create Goal

4. In the **Goal** text box enter a title for the goal you are adding.
(ex. Customer Service)

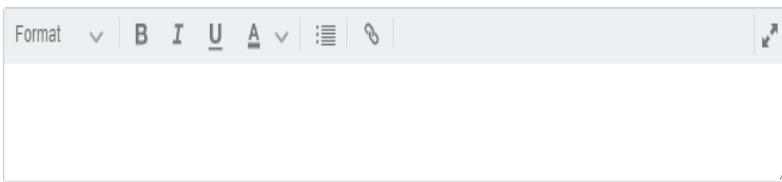
Add Goal



A screenshot of the 'Add Goal' dialog box. At the top left, it says 'Goal' with a red asterisk (*) indicating it is required. To the right of the text box are various formatting buttons: 'Normal' (dropdown), 'B' (bold), 'I' (italic), 'U' (underline), 'A' (dropdown), 'List' (dropdown), and 'Search' (magnifying glass icon). The main text area contains the text 'Customer Service'.

5. In the **Description** text box add the details about the goal.

Description



6. Now add a **Category** that applies to the current goal being entered. All KGI goal categories will begin with KGI.

Description

Search Results (3)

- KGI Departmental Goals
- KGI Individual Goals
- KGI Organizational Goals

Status

Category

kgi

7. Next select a **Status** for the goal.

Status

select one

Due Date

Associated Rev

Milestones 0



select one

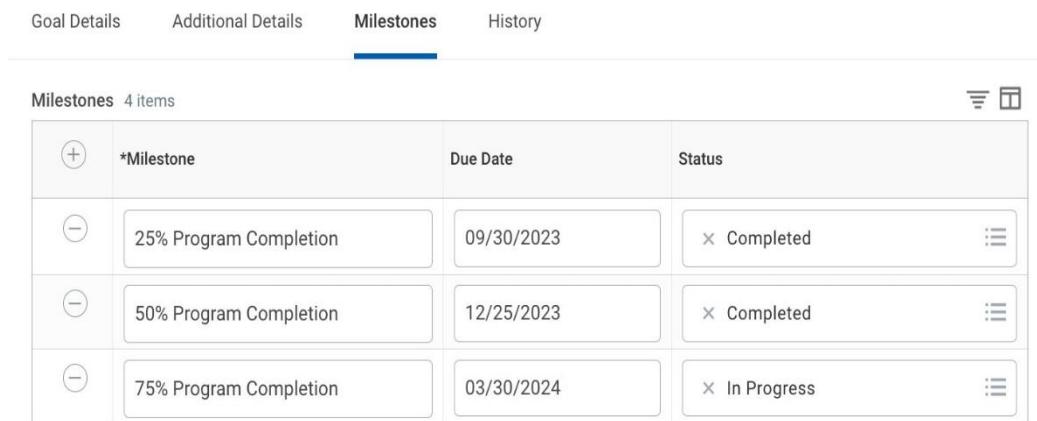
- Not Applicable
- Not Started
- In Progress
- Completed
- Incomplete

8. Now add the corresponding **Due Date** for the goal.

Due Date

MM / DD / YYYY 

9. Under the **Milestones** tab you can set milestones to help you track your progress on a goal over time.



Milestones 4 items			
	*Milestone	Due Date	Status
	25% Program Completion	09/30/2023	Completed
	50% Program Completion	12/25/2023	Completed
	75% Program Completion	03/30/2024	In Progress

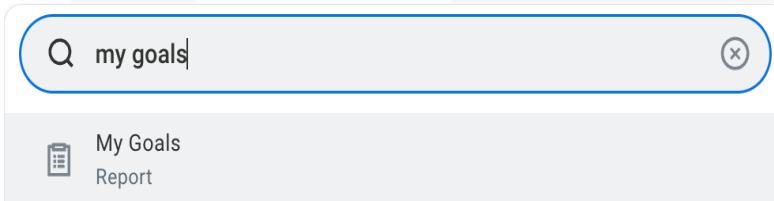
10. Finish the goal by clicking **Submit** to route it for manager approval and finalize.



Submit

Assessing Goals

1. Start by searching for **My Goals** in the Workday search bar.



2. Make sure the Individual Goals tab is selected and click the **Edit Goal** button in the bottom left of each goal to edit current goals.



3. Next update the **Status** for the goal.

Status	select one
Due Date	
Associated Rev	
Milestones 0	+

select one

- Not Applicable
- Not Started
- In Progress
- Completed
- Incomplete

4. If the goal is completed, enter the corresponding **Completion Date** for the goal.

Completed On 

5. Finish the goal by clicking **Submit** to route it for manager approval and finalize.

Submit