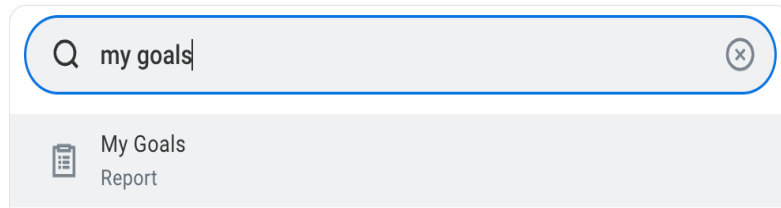


Creating and Assessing Goals in Workday

Creating Goals

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



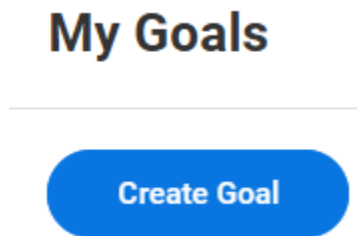
A screenshot of the Workday search bar. The search bar contains the text "my goals". Below the search bar, a dropdown menu is visible, showing a result "My Goals Report" with a document icon.

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.



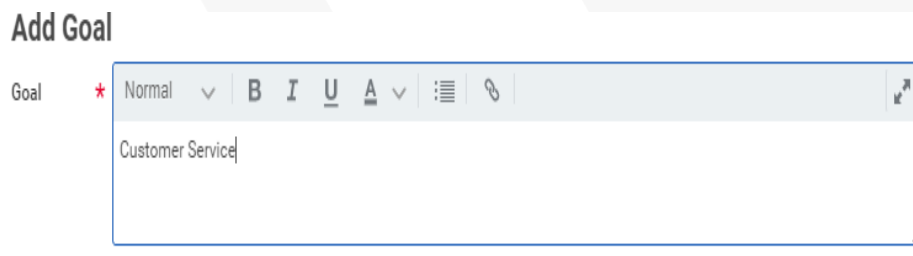
A screenshot of the "My Goals" page. At the top, there are two tabs: "Individual Goals" and "Archived Goals". The "Individual Goals" tab is selected, indicated by a blue underline. Below the tabs, there is a list of goals. One goal is visible, and the "Edit Goal" button is highlighted in blue.

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



A screenshot of the "My Goals" page. The title "My Goals" is at the top. Below the title, there is a blue button labeled "Create Goal".

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



A screenshot of the "Add Goal" form. The form has a title "Add Goal". Below the title, there is a text box labeled "Goal" with a red asterisk. The text box contains the text "Customer Service". Above the text box, there is a toolbar with various formatting options: Normal, Bold (B), Italic (I), Underline (U), Text Color (A), Bulleted List, and Link.

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

Description

Format

B

I

U

A

:

⌵

🔗

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

Description

Status

Category

Search Results (3)

☐ KGI Departmental Goals

☐ KGI Individual Goals

☐ KGI Organizational Goals

kgi

✕

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

Status

Due Date

Associated Review

Milestones 0

select one

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.

Goal Details Additional Details **Milestones** History

Milestones 4 items ⌵ ⌲

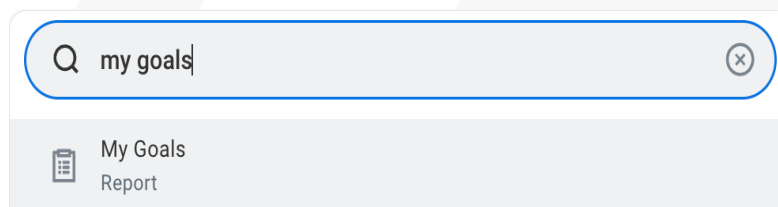
	*Milestone	Due Date	Status
⊖	25% Program Completion	09/30/2023	× Completed ⋮
⊖	50% Program Completion	12/25/2023	× Completed ⋮
⊖	75% Program Completion	03/30/2024	× In Progress ⋮

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

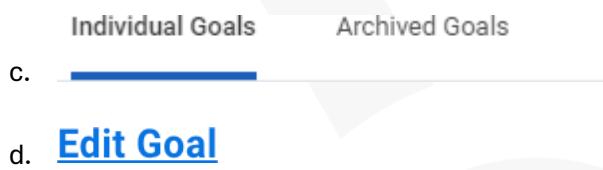


Assessing Goals

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.





KECK GRADUATE INSTITUTE

A Member of The Claremont Colleges

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

Status	<div>select one ▼</div> <div>select one</div> <div>Not Applicable</div> <div>Not Started</div> <div>In Progress</div> <div>Completed</div> <div>Incomplete</div>
Due Date	
Associated Review	
Milestones 0	
<div>+</div>	

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

Completed On

MM/DD/YYYY



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

Submit