Goal Management for Managers: Manage Team and Employee Goals

Overview

- This job aid is intended for Managers to add a goal for their team, share a goal, assign a goal, align goals, or delete goals for a direct report.
- Although the focus is on Performance Goals, many of the steps are similar for Development Goals.
- Managing team performance goals are necessary when a manager wants to involve the entire team to achieve certain team objectives.
  - *Example: A Line Manager wants to manage or edit team goals to achieve better time management across their team.*
- At any time, Managers can track, edit, delete, or create team performance goals for their respective organization. This job aid will describe the process of performing these actions.

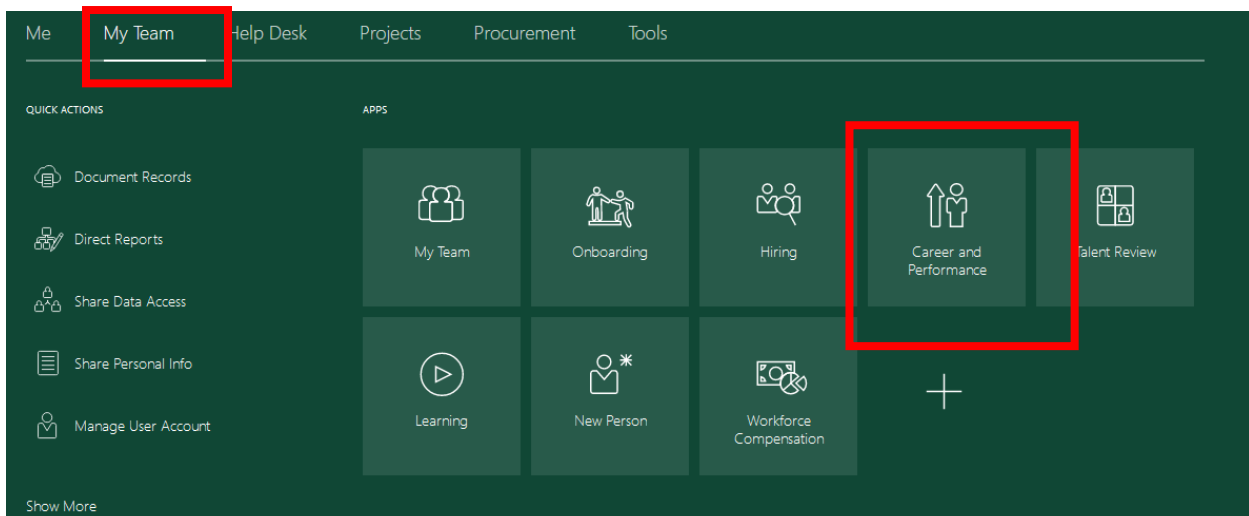## Contents

1. Navigating to the Self-Service Module

1. You can access the **Career and Performance** section in two ways:
   a. Click the **Navigator** icon in upper left-hand corner of the Ignite landing page.

   b. Under the **My Team** section, click the drop-down arrow, and select **Career and Performance** from the dropdown list.
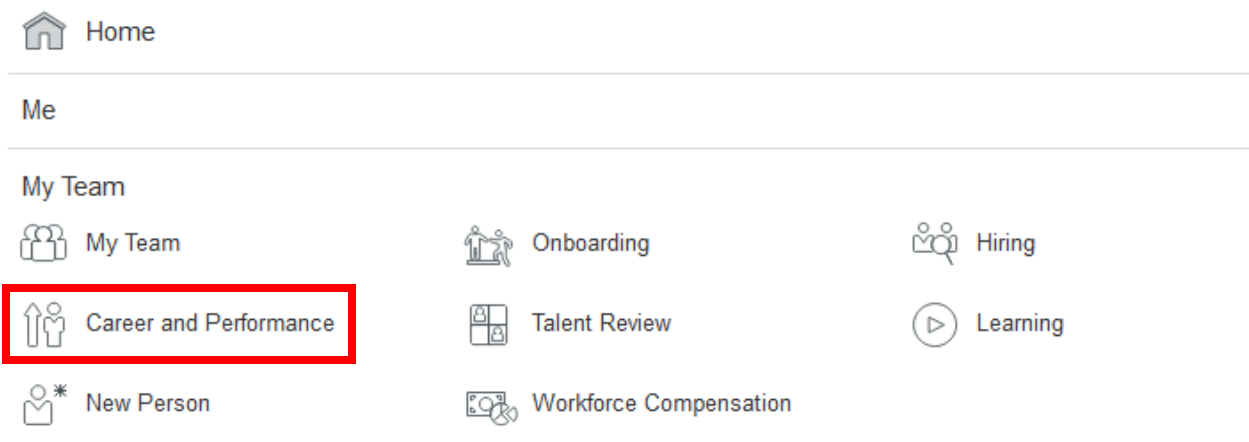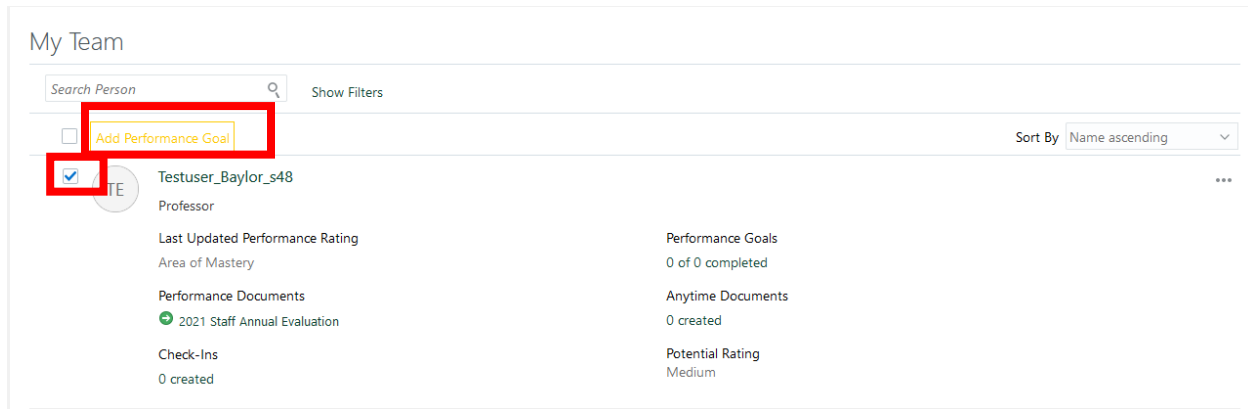
   c. (Option 2) Under the **My Team** heading on the home page, you can scroll down and click on the **Career and Performance** tile on the main page.

2. Add Goals for Team

1. On the **Goals and Performance** page, check the box by the employees you'd like to create a team goal for. Then select **Add Performance Goals.**
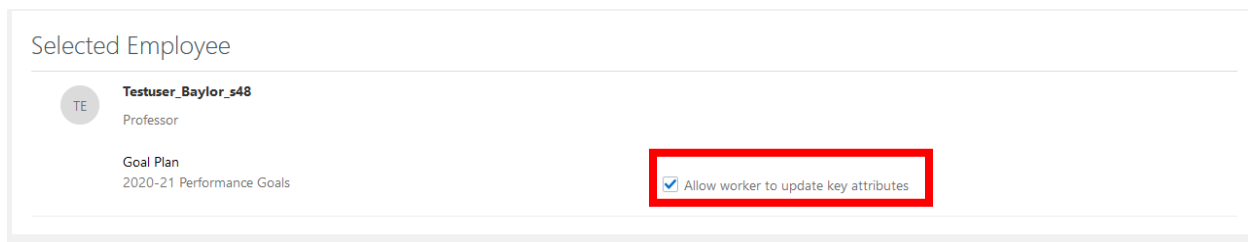

2. In the **Selected Employees** popup, ensure **Allow worker to update key attributes** is checked to allow your direct report to be able to edit or update the goal.

3. Scroll down to view the **Add Goal** page. In this step, you will add goal details. Complete the following optional and required fields:

Basic Info

Library Goal
Select a value

*Goal Name

Description

*Start Date
06/01/2020

Category
Select a value

Target Completion Date
05/07/2021

Status
Not started

Success Criteria

Font | 2 | **B** *I* U

a. <u>Library Goal</u>: optional, will allow you to select and edit a goal from the goal library. If you do not wish to use a library goal, leave this section blank

b. <u>Goal Name</u>: enter any goal name

c. <u>Start Date</u>: enter the start date of the goal

d. <u>Target Completion Date</u>: enter the target date the goal should be completed

e. <u>Description</u>: enter description of goal

f. <u>Status</u>: choose from Not Started, In Progress, or Complete

4. After inputting details about your goal, you can also add measurements by selecting the **Add** button by scrolling down from the **Basic Info** section.

Measurements   **+ Add**   ^

Measurements   There's nothing here so far.

5. Optionally, you can input the following fields to create a measurement to correspond with your goal. Click **Save** when finished inputting the fields below.

a. <u>Measurement Name</u>: this can be any name (i.e. Excel workbooks completed)
b. <u>Unit of Measure</u>: choose from none, currency, number, or percent
c. <u>Start Date:</u> choose a day which the measurement should take effect
d. <u>End Date:</u> choose a day the measurement should conclude

6. You can also add tasks to your goal. This is usually done when it will take multiple actions to complete a goal. To add a Task, click the **Add** icon.

7. Afterwards, input the following fields as necessary.

a. <u>Name</u>: enter a task name
b. <u>Type</u>: select the type of task from the drop-down menu
c. <u>Status</u>: choose from Not Started, In Progress, Completed, or Overdue
d. <u>Priority</u>: defaults to medium but can be adjusted as desired
e. <u>Completion Percentage</u>: may auto-populate depending on status. Can change as needed.
f. <u>Start Date:</u> choose a day which the task should take effect
g. <u>Target Completion Date:</u> enter the date the task should be completed
h. <u>Related Link</u>: copy and paste the desired link in box.

8. After completing all of the required fields, scroll to the top of the page and click **Save and Close** in the top right-hand corner to create the team goal.


9. The goal has been added.

3. Share Goals with Direct Reports

Sharing a Goal: An employee can share a goal with another employee as a suggestion. The recipient will find the shared goal in their Goals Shared with Me area, where they can choose whether or not to add it to their goal plan.
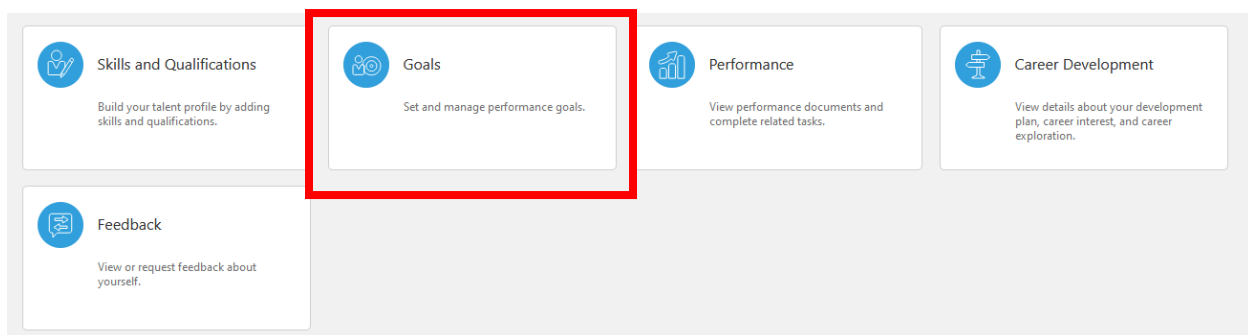
1. To share a goal with a direct report, navigate to the **Me** section.

2. Click the **Career and Performance** tab.
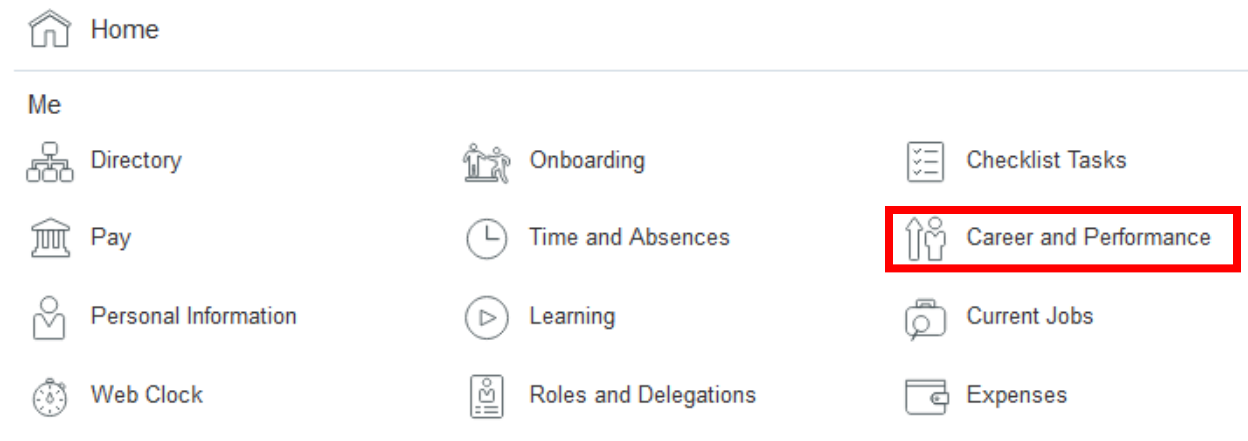
3. Click **Goals.** The **My Goals** page is displayed.

4. To share a goal, select the checkbox next to its name, and click the **Actions** drop-down. Click **Share.**
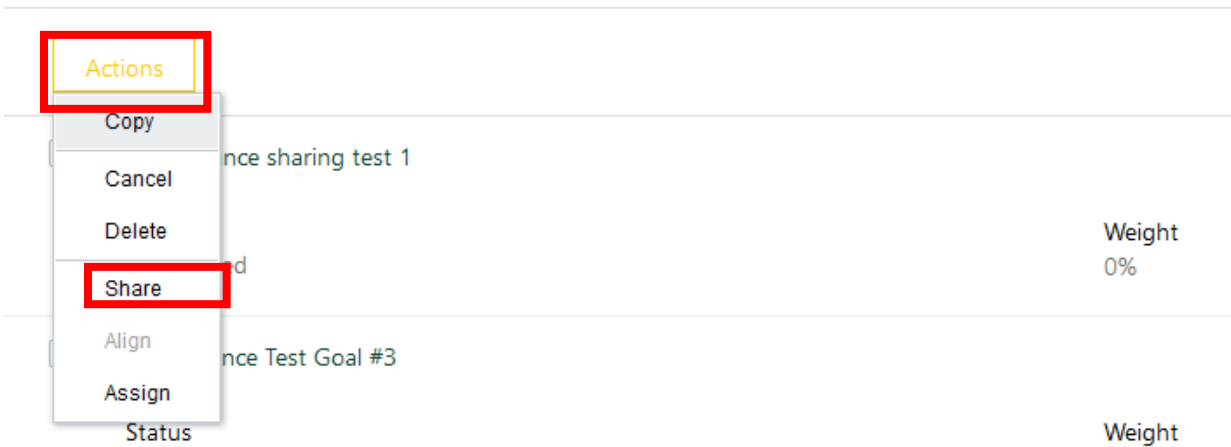
5. Your direct reports are automatically selected. Uncheck any employees you do not want to share the goal with.

6. If you want to share tasks, check the **Share Tasks** checkbox in the upper left corner.

7. Click **Save and Close** in the right-hand corner.
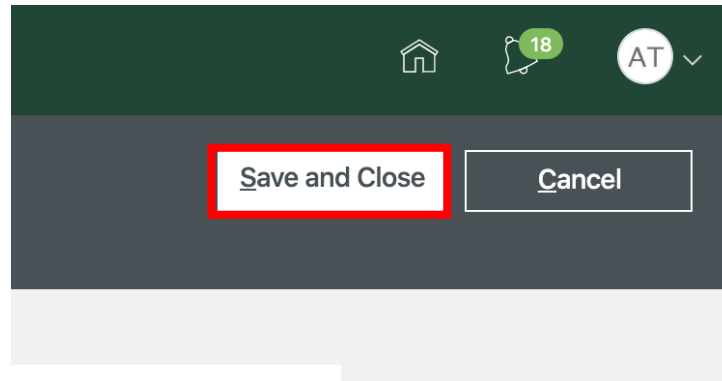
8. Then, click the **OK** in the popup window. The goal has been shared with your direct reports. They will have the option to use or ignore the shared goal. If they choose to use the goal, it will be submitted to you for approval.

4. Assign Manager Goals to Direct Reports

Assigning Goals: A manager can assign goals to members of their team, adding it to their employee's goal plan. Unlike sharing a goal, assigning a goal will add it directly to the recipient's goal plan. The process is the same as **Sharing Goals** above, except **Assign** is selected under **Actions**.

5. Align a Goal for a Direct Report

Aligning Goals: A manager can align an employee's goal to one of the Manger's, a Colleague's, or an Organizational goal. Aligning goals makes it easier for the manager to track multiple employees' goal progression as well as track an entire organization's progress towards a goal.

1. Navigate to the **Career and Performance** tab under **My Team**. This action is detailed in the first process of this document. Select the **Goals** tile.

2. On the **Goals and Performance Overview** page, click on the hyperlink under **Completed Goals**. This will take you to the employee's personal goal page.

3. The direct report's goals should populate. If they don't appear, make sure you are in the correct review period and goal plan.
4. To align a goal, select the checkbox next to its name, and click the **Actions** drop-down. Click **Align.**
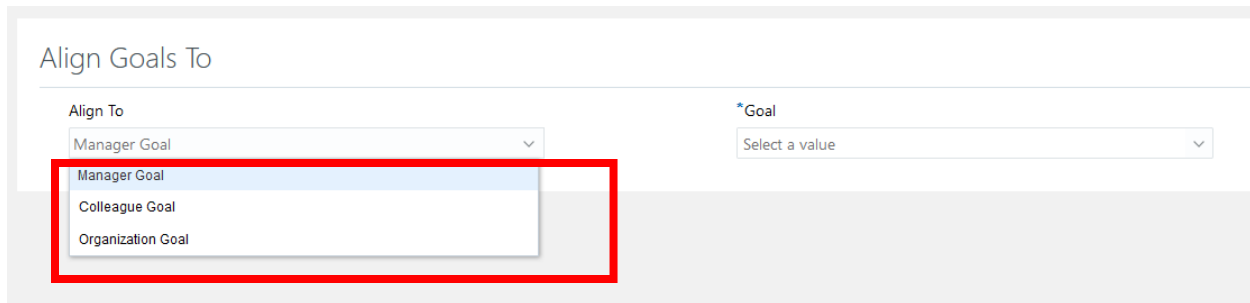
5. In the **Align Goal Page**, select whether it is being aligned to Manger, Colleague, or Organization goal and then the Goal name. Click **Save and Close**.

6. The employees' goal has successfully been aligned.

6. Manage/Edit Direct Reports' Goals

1. Navigate to the **Career and Performance** tab under **My Team**. This action is detailed in the first process of this document. Select the **Goals** tile.

2. On the **Goals and Performance Overview** page, click on the hyperlink under **Completed Goals**. This will take you to the employee's personal goal page.

3. On the Team page, click on the hyperlink under **Completed Goals**. This will take you to their employee's personal goal page.

My Team

Search Person 🔍	Show Filters

☐ Add Performance Goal   Sort By | Name ascending ▼

☐ **TE** Testuser_Baylor_s48   ...

Last Updated Performance Rating   Performance Goals
Area of Mastery   0 of 1 completed

Performance Documents   Anytime Documents
→ 2021 Staff Annual Evaluation   0 created

Check-Ins   Potential Rating
0 created   Medium

4. Click on the **goal name** you'd like to manage or edit. To manage a goal, you may edit anything on the goals detail page.

2020-21 Performance Goals

Actions

☐ Priority Management

Status   Weight
Not started   0%

ignite

5. To edit the goal, click the **Edit** button.

Basic Info

6. The goal details are displayed. You can edit any section of the form as well as add additional details. When you're finished managing the goal, click **Save.**

7. The goal has been successfully managed within the system.

7. Cancel or Delete Goals for a Direct Report

1. Navigate to the **Career and Performance** tab under **My Team**. This action is detailed in the first process of this document. Select the **Goals** tile.

2. On the **Goals and Performance Overview** page, click on the hyperlink under **Completed Goals**. This will take you to the employee's personal goal page.

3. On the Team page, click on the hyperlink under **Completed Goals**. This will take you to their employee's personal goal page.

My Team

Search Person 🔍	Show Filters

☐ Add Performance Goal   Sort By Name ascending ▾

☐ (TE) Testuser_Baylor_s48   ...

Last Updated Performance Rating   Performance Goals
Area of Mastery   0 of 1 completed

Performance Documents   Anytime Documents
➲ 2021 Staff Annual Evaluation   0 created

Check-Ins
0 created   Potential Rating
                                                                       Medium

4. Click on the **goal name** you'd like to manage or edit. To manage a goal, you may edit anything on the goals detail page.

2020-21 Performance Goals

Actions

☐ Priority Management

Status   Weight
Not started   0%

5. To cancel a goal, select the checkbox next to its name, and click the **Actions** button from the drop-down menu. Click **Cancel** or **Delete**. Note: Canceling goals leaves them visible on the goal plan, but they cannot be managed, edited, aligned, or assigned. Deleting will remove the goal from the goal plan, but once deleted it cannot be recovered from the system.

2020-21 Performance Goals

Actions

Priority Management

Status
Not started

Weight
0%

2020-21 Performance Goals

Actions

Copy

Cancel

Delete

Align

Management

ed

9. Copy a Goal for a Direct Report

1. Navigate to the **Career and Performance** tab under **My Team**. This action is detailed in the first process of this document. Select the **Goals** tile.

2. On the **Goals and Performance Overview** page, click on the hyperlink under **Completed Goals**. This will take you to the employee's personal goal page.

3. On the Team page, click on the hyperlink under **Completed Goals**. This will take you to their employee's personal goal page.

My Team

Search Person 🔍	Show Filters		
☐ Add Performance Goal		Sort By	Name ascending ▾

☐ (TE) Testuser_Baylor_s48   •••

Last Updated Performance Rating
Area of Mastery

Performance Goals
0 of 1 completed

Performance Documents
➤ 2021 Staff Annual Evaluation

Anytime Documents
0 created

Check-Ins
0 created

Potential Rating
Medium

4. Click on the **goal name** you'd like to manage or edit. To manage a goal, you may edit anything on the goals detail page.

2020-21 Performance Goals

Actions

☐ Priority Management

Status
Not started

Weight
0%

5. To copy a goal, select the check box next to its name and click the **Actions** drop-down menu. Click **Copy**.
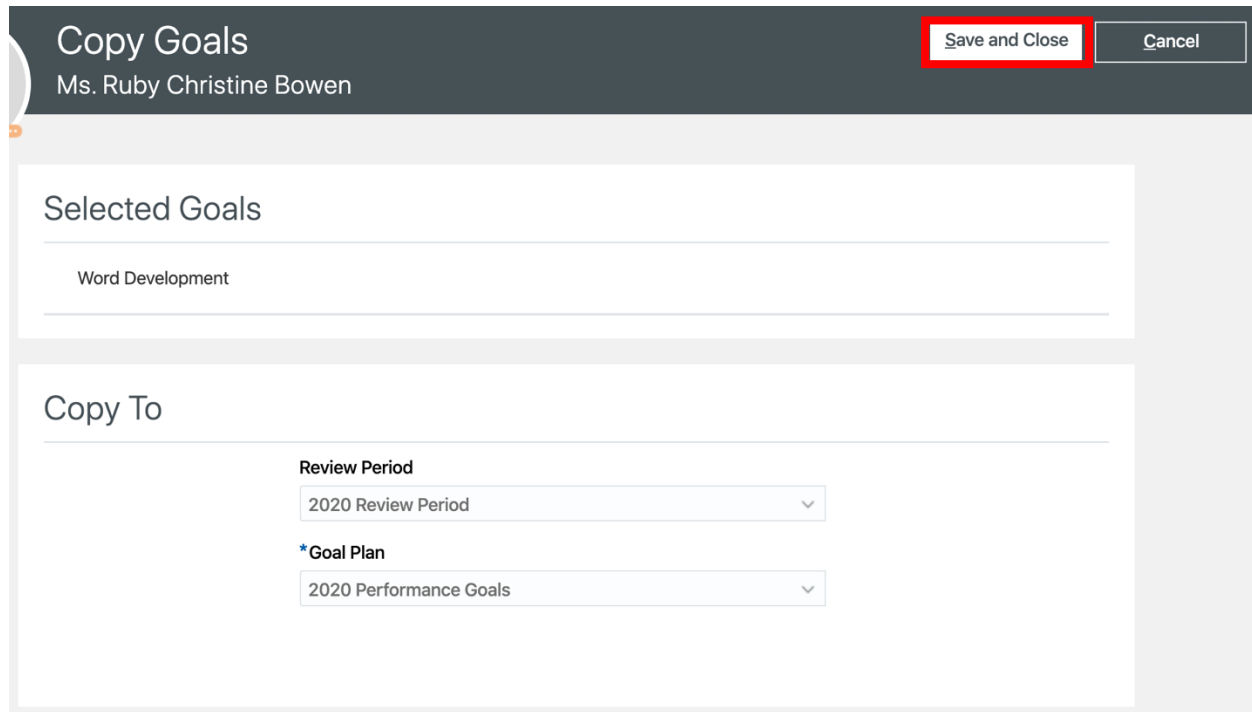
2020-21 Performance Goals

Actions

☐ Priority Management

Status
Not started

Weight
0%

2020-21 Performance Goals

Actions

Copy
Cancel
Delete
Align

Management

ed

ignite

6. Afterwards, choose the review period and goal plan that you would like to copy to. Click **Save and Close**. The goal has been copied to another review period and goal plan.

## 10. Approve Goals Submitted by Direct Reports

1. Click the **notification bell** in the upper right-hand corner of the screen to check for notifications.
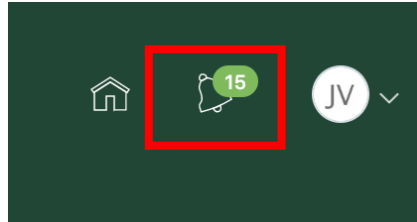
2. There are two ways to approve a goal plan. After clicking the notification bell, simply click the **Approve** button to approve the goal.
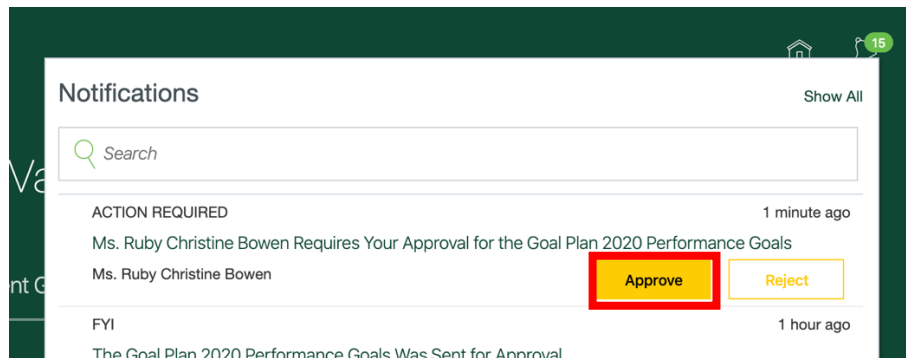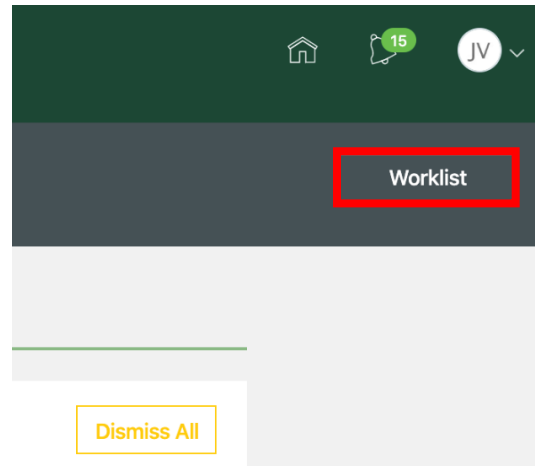

3. Alternatively, you may also navigate to the BPM worklist to view all goals submitted for approval. Click **Show All**. The notifications page is displayed.
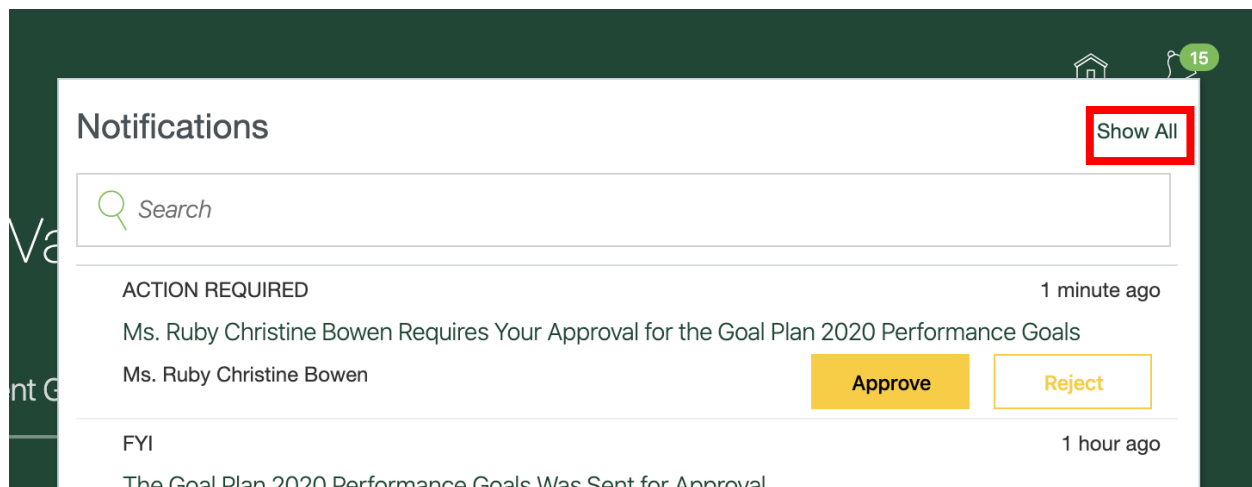
4. In the upper right-hand corner of the screen, click the **Worklist** button.

a. Note: Make sure that your pop-up blocker allows permissions for all pop-ups.

5. You should see [Employee Name] Requires Your Approval for the [Goal Plan Name]. Click on the **Goal name** to see its information.

6. The goal information should be displayed. To approve the goal, click the **Approve** button in the top right-hand corner of the pop-up. Alternatively, you can reject a goal and approve another by clicking **Reject.**

Ms. Ruby Christine Bowen Requires Your Approval for the Goal Plan 2020 Performance Goals   Edit   Actions ▾   **Approve**   Reject

Ms. Ruby Christine Bowen
Goal Plan Approval Request

Worker Ms. Ruby Christine Bowen has submitted 2020 Performance Goals for your approval

Review Period	2020 Review Period
Goal Plan	2020 Performance Goals

Added Goals

Automating Manual Processes

Goal Name	Automating Manual Processes
Description	TEST
Category	Financial
Status	In progress

7. You can add additional comments when approving the goal. If you decided to reject the goal, it is recommended you leave a comment explaining why. Click **Submit.**

Approve   **Submit**   Cancel

Comment

Drag files here or click to add attachment
˅

8. The goal has been approved and will be displayed in the employee's goals page.