

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.

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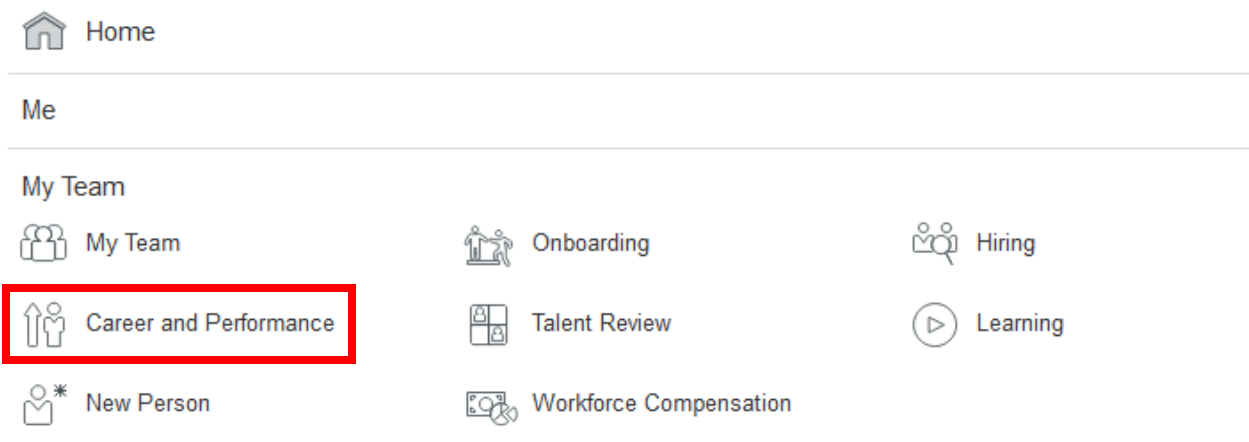
Goal Management for Managers: Manage Team and Employee Goals

I. Navigating to the Self-Service Module

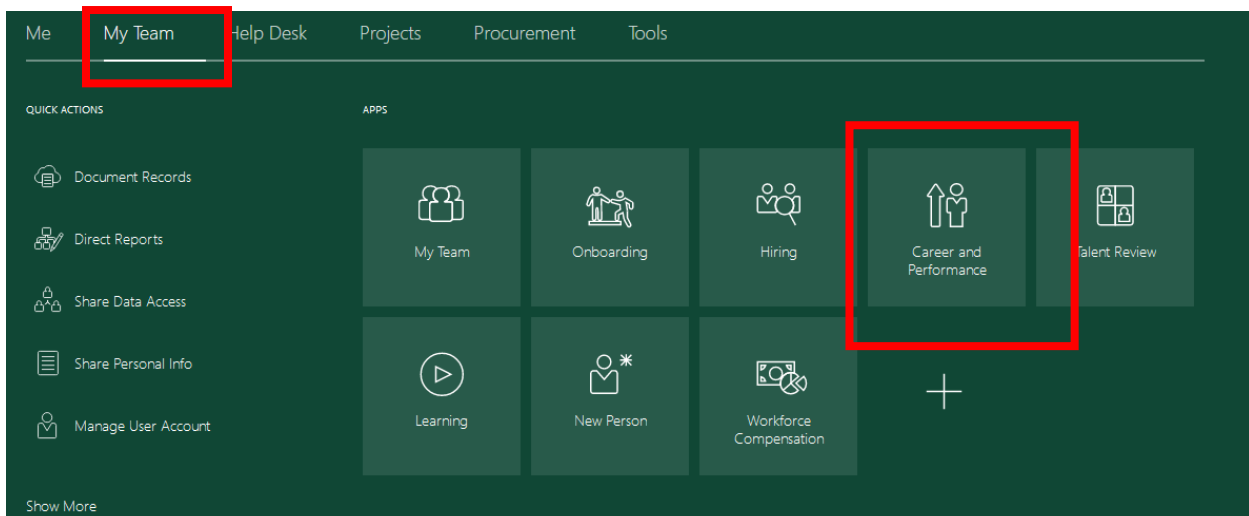
- I. You can access the **Career and Performance** section in two ways:
 - a. Click the **Navigator** icon in upper left-hand corner of the Ignite landing page.



- b. Under the **My Team** section, click the drop-down arrow, and select **Career and Performance** from the dropdown list.



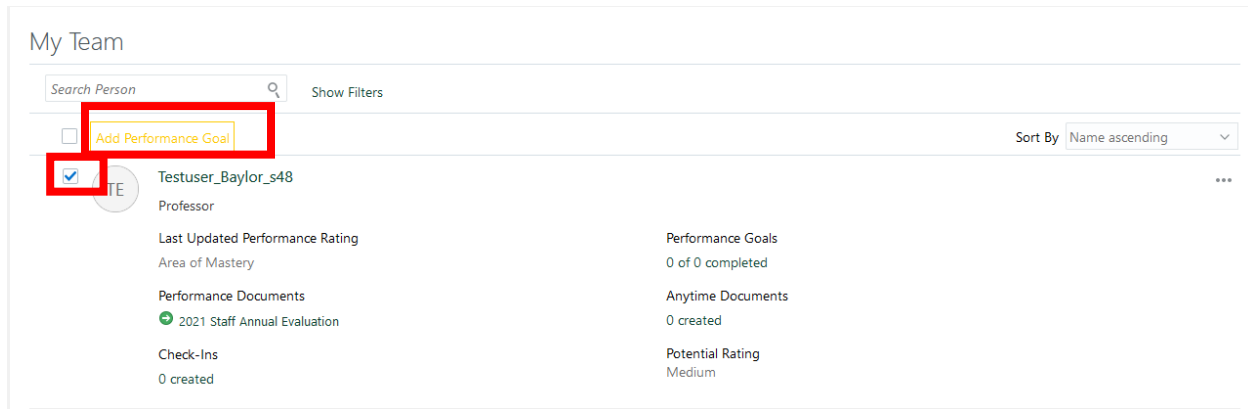
- c. (Option 2) Under the **My Team** heading on the home page, you can scroll down and click on the **Career and Performance** tile on the main page.



Goal Management for Managers: Manage Team and Employee Goals

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**.



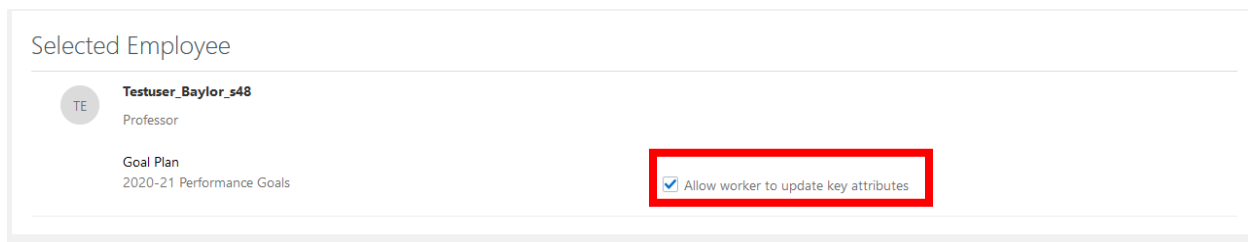
My Team

Search Person Show Filters


☐ Add Performance Goal Sort By Name ascending

<input checked="" type="checkbox"/>	 Testuser_Baylor_s48 Professor	...
	Last Updated Performance Rating	Performance Goals
	Area of Mastery	0 of 0 completed
	Performance Documents	Anytime Documents
	2021 Staff Annual Evaluation	0 created
	Check-Ins	Potential Rating
	0 created	Medium

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.



Selected Employee

 **Testuser_Baylor_s48**
Professor

Goal Plan
2020-21 Performance Goals

☒ Allow worker to update key attributes

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

Goal Management for Managers: Manage Team and Employee Goals

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	

- Library Goal: 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
 - Goal Name: enter any goal name
 - Start Date: enter the start date of the goal
 - Target Completion Date: enter the target date the goal should be completed
 - Description: enter description of goal
 - Status: 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.








Measurements

* Measurement Name

Unit of Measure

None

Comments

Font 2 **B** *I* U       

Start Date

mm/dd/yyyy

End Date

mm/dd/yyyy

Save

Cancel

- [illegible]



Goal Management for Managers: Manage Team and Employee Goals

Tasks

*Name	Completion Percentage
<input type="text"/>	<input type="text" value="0"/>
*Type	Start Date
Coaching	<input type="text" value="mm/dd/yyyy"/>
Status	Target Completion Date
Not started	<input type="text" value="mm/dd/yyyy"/>
Priority	Related Link
Medium	<input type="text"/>

Comments

Font 2 B I U

- Name: enter a task name
 - Type: select the type of task from the drop-down menu
 - Status: choose from Not Started, In Progress, Completed, or Overdue
 - Priority: defaults to medium but can be adjusted as desired
 - Completion Percentage: may auto-populate depending on status. Can change as needed.
 - Start Date: choose a day which the task should take effect
 - Target Completion Date: enter the date the task should be completed
 - Related Link: 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.

Add Performance Goal

9. The goal has been added.

Goal Management for Managers: Manage Team and Employee Goals

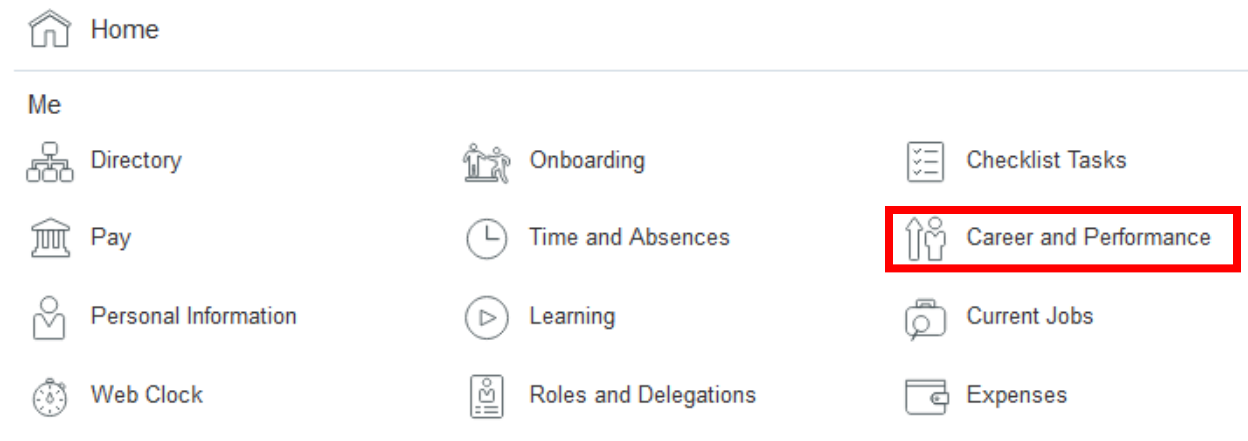
3. Share Goals with Direct Reports

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.

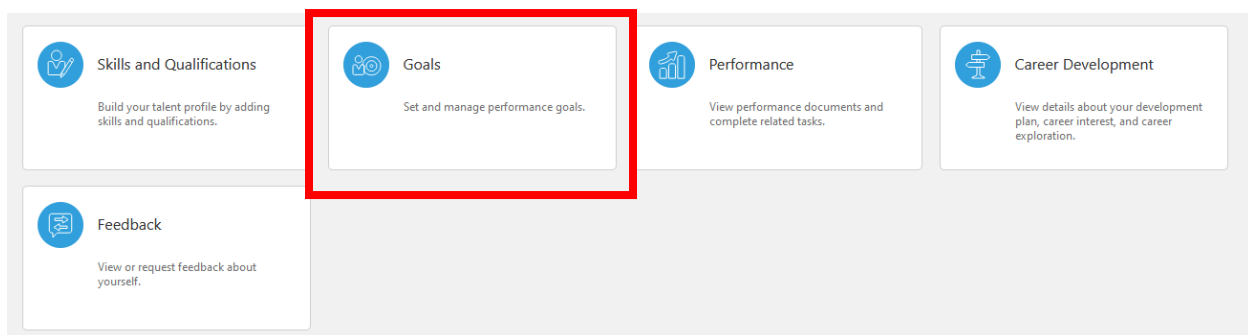
1. To share a goal with a direct report, navigate to the **Me** section.



2. Click the **Career and Performance** tab.

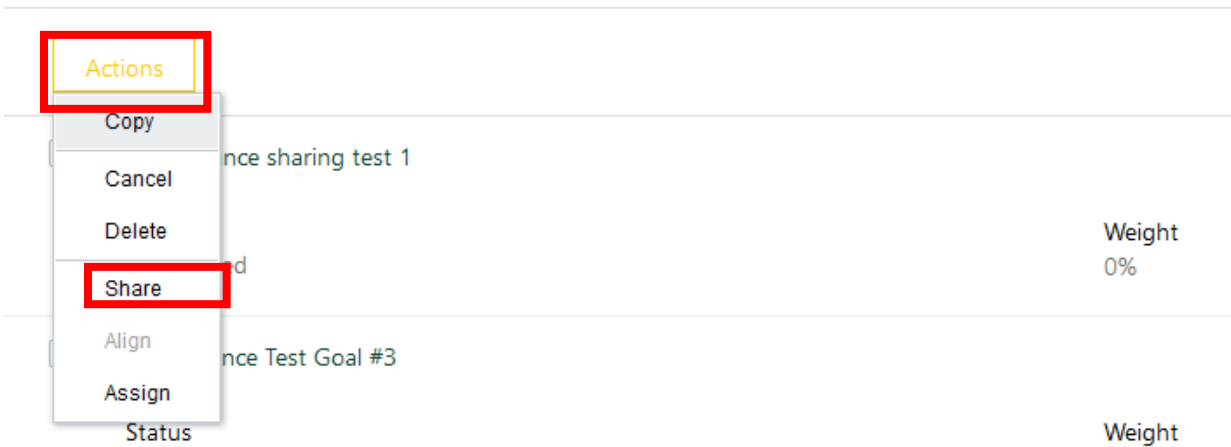


3. Click **Goals**. The **My Goals** page is displayed.



Goal Management for Managers: Manage Team and Employee Goals

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.


Selected Goals

performance sharing test 1

☒ Share tasks

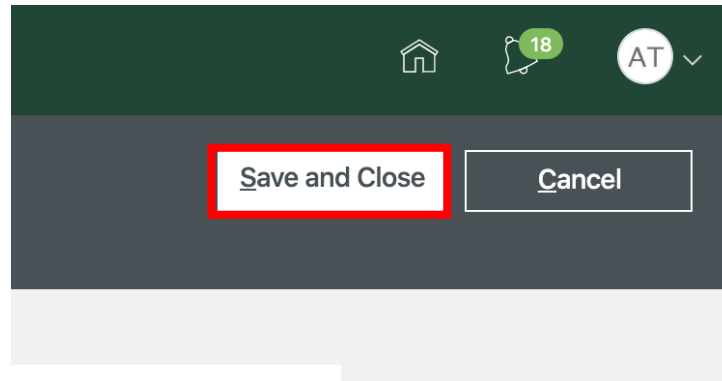
Share Goals With

☒ Add Worker

☒  Testuser_Baylor_s48
Professor

Goal Management for Managers: Manage Team and Employee Goals

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.

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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**.

Actions	
Copy	
Cancel	nce sharing test 1
Delete	
Share	ed
Align	Test Goal #3
Assign	
Status	Weight

Goal Management for Managers: Manage Team and Employee Goals

5. Align a Goal for a Direct Report

Aligning Goals: A manager can align an employee's goal to one of the Manager'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.

My Team

Search Person Show Filters

☐ Add Performance Goal Sort By Name ascending

<input type="checkbox"/>	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

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**.

2020-21 Performance Goals

<input type="checkbox"/>	Performance sharing test 1	Weight
		0%

Actions

Copy

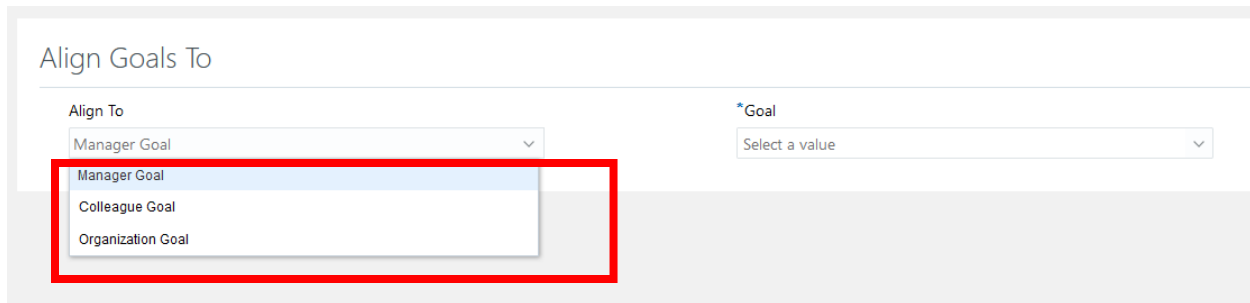
Cancel

Delete

Align

Goal Management for Managers: Manage Team and Employee Goals

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**.



Align Goals To

Align To

Manager Goal

Manager Goal

Colleague Goal

Organization Goal

*Goal

Select a value

6. The employees' goal has successfully been aligned.

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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

☐ [Add Performance Goal](#)

Sort By Name ascending

<input type="checkbox"/>	<div>TE</div> <div>Testuser_Baylor_s48</div> <div>...</div>	<div>Performance Goals</div> <div>0 of 1 completed</div> <div>Anytime Documents</div> <div>0 created</div> <div>Potential Rating</div> <div>Medium</div>
	<div>Last Updated Performance Rating</div> <div>Area of Mastery</div> <div>Performance Documents</div> <div>2021 Staff Annual Evaluation</div> <div>Check-Ins</div> <div>0 created</div>	

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

<input type="checkbox"/>	<div>Priority Management</div>	
	<div>Status</div> <div>Not started</div>	<div>Weight</div> <div>0%</div>

Goal Management for Managers: Manage Team and Employee Goals

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

Basic Info

 Edit

Goal Name
Priority Management

Status
Not started

Start Date
06/01/2020

Weight
0%

Target Completion Date
05/07/2021

Source
Manager

Last Update
Testuser_Baylor_s47 07/11/2020

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**.

Basic Info

Save

Cancel

*Goal Name

Priority Management

☒ Allow worker to update key attributes

Description

*Start Date

06/01/2020



Status

Not started



Target Completion Date

05/07/2021



Weight


0

Category

Select a value



Success Criteria

Font 2 B I U      

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

Goal Management for Managers: Manage Team and Employee Goals

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

☐ Add Performance Goal

Sort By Name ascending

☐ TE Testuser_Baylor_s48

Last Updated Performance Rating

Area of Mastery

Performance Documents

2021 Staff Annual Evaluation

Check-Ins

0 created

Performance Goals

0 of 1 completed

Anytime Documents

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%

Goal Management for Managers: Manage Team and Employee Goals

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		
<input type="checkbox"/>	Priority Management	
Status		Weight
Not started		0%

2020-21 Performance Goals

Actions		
<input type="checkbox"/>	Copy	
	Priority Management	
	Cancel	
	Delete	
	Align	

Goal Management for Managers: Manage Team and Employee Goals

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

☐ Add Performance Goal

Sort By | Name ascending

<input type="checkbox"/>	TE	Testuser_Baylor_s48	...
		Last Updated Performance Rating	
		Area of Mastery	
		Performance Documents	
		2021 Staff Annual Evaluation	
		Check-Ins	
		0 created	
		Performance Goals	
		0 of 1 completed	
		Anytime Documents	
		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

<input type="checkbox"/>	Priority Management	
	Status	Weight
	Not started	0%

Goal Management for Managers: Manage Team and Employee Goals

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

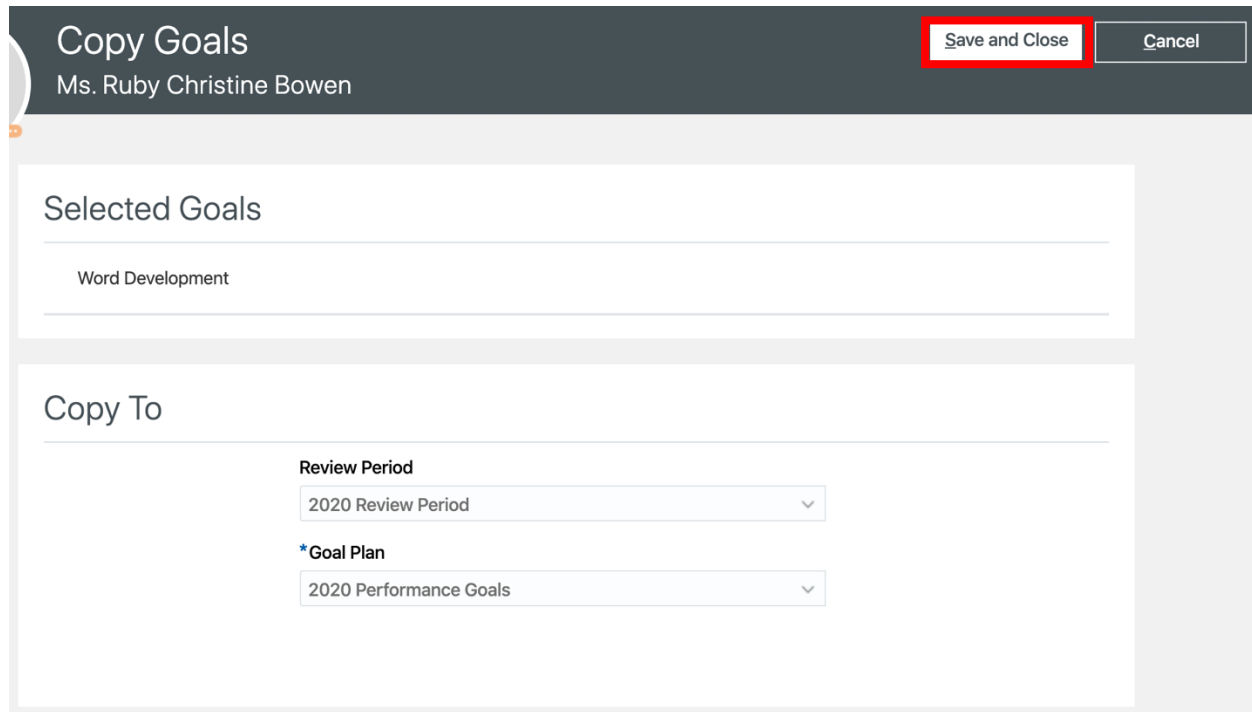
Actions		
<input type="checkbox"/>	Priority Management	
Status	Not started	Weight
		0%

2020-21 Performance Goals

Actions		
<input type="checkbox"/>	Priority Management	
Copy	Cancel	Delete
Align		

Goal Management for Managers: Manage Team and Employee Goals

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.



The screenshot shows a 'Copy Goals' dialog box for Ms. Ruby Christine Bowen. It features a dark header bar with the title 'Copy Goals' and the user's name. In the top right corner, there are two buttons: 'Save and Close' (highlighted with a red rectangle) and 'Cancel'. The main area is divided into two sections: 'Selected Goals' and 'Copy To'. The 'Selected Goals' section contains a single entry, 'Word Development'. The 'Copy To' section contains two dropdown menus: 'Review Period' (set to '2020 Review Period') and '*Goal Plan' (set to '2020 Performance Goals').

Copy Goals
Ms. Ruby Christine Bowen

Save and Close Cancel

Selected Goals

Word Development

Copy To

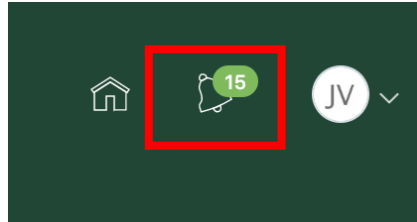
Review Period
2020 Review Period

*Goal Plan
2020 Performance Goals

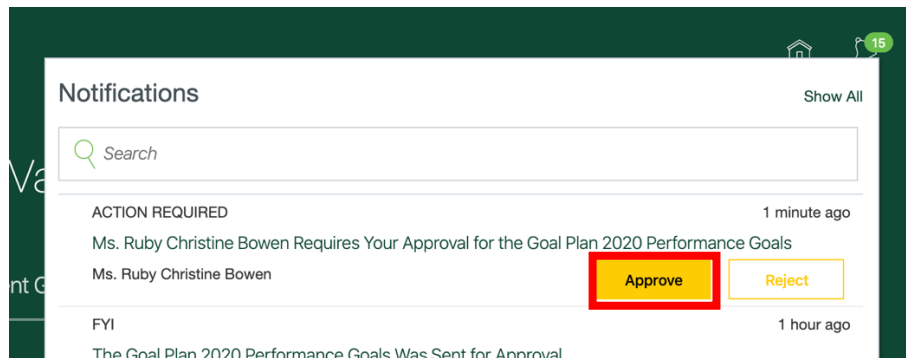
Goal Management for Managers: Manage Team and Employee Goals

10. Approve Goals Submitted by Direct Reports

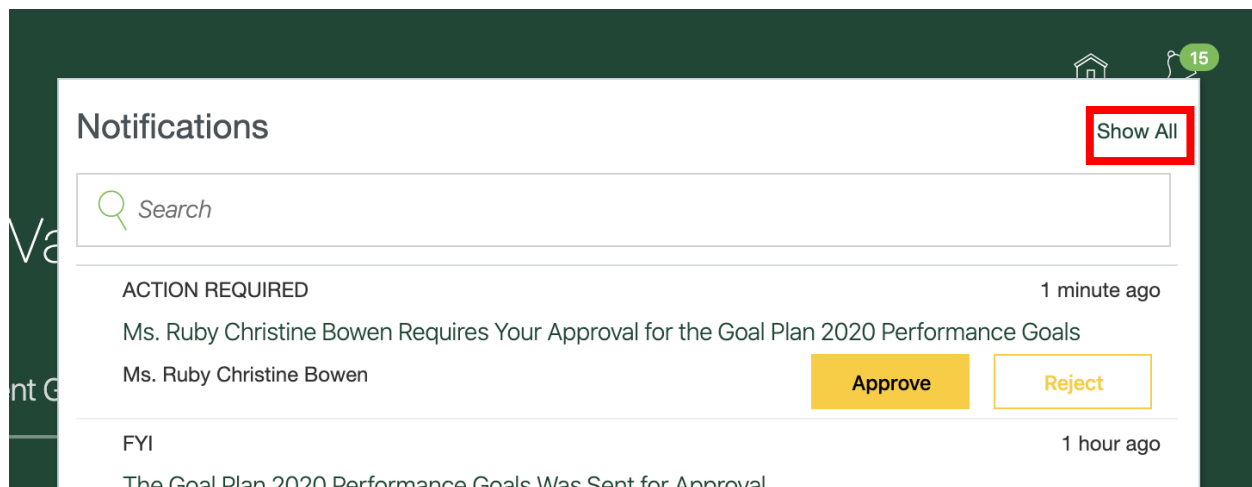
1. Click the **notification bell** in the upper right-hand corner of the screen to check for notifications.



2. There are two ways to approve a goal plan. After clicking the notification bell, simply click the **Approve** button to approve the goal.

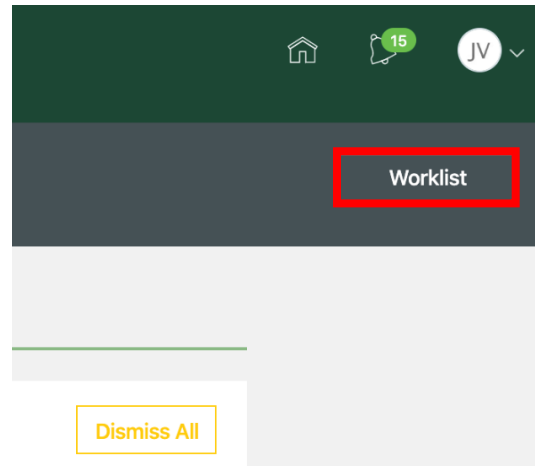


3. Alternatively, you may also navigate to the BPM worklist to view all goals submitted for approval. Click **Show All**. The notifications page is displayed.



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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.

A screenshot of the 'My Tasks' view in a web application. The view shows a list of tasks with columns for Title, Number, Creator, Assigned, and Priority. The first task, 'Ms. Ruby Christine Bowen Requires Your Approval for the Goal Pla', is highlighted with a red box. The task is assigned to 'Bowen' and has a priority of 3. The other tasks in the list are related to performance goals and ratings.

Views	Actions	Title	Number	Creator	Assigned	Priority
Inbox		Ms. Ruby Christine Bowen Requires Your Approval for the Goal Pla	201458	Bowen	1/30/20 3:27 PM	3
My Tasks (15)		The Goal Plan 2020 Performance Goals Was Sent for Approval	201424	Van Zee	1/30/20 1:38 PM	3
Initiated Tasks		Performance Rating Removed from Profile Ms. Bowen, Ruby by Cc	201039	Config_Emp2	1/29/20 10:06 AM	3
Administrative Tasks		Performance Rating Added to Profile Ms. Fenty, Stephanie by Conf	201037	Config_Emp2	1/29/20 10:06 AM	3
		Career Potential Added to Profile Ms. Bowen, Ruby by Config_Emp	200988	Config_Emp2	1/29/20 10:06 AM	3

Goal Management for Managers: Manage Team and Employee Goals

- 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

- 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



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