

Goals: Entering, Updating, & Sharing Goals

Overview

IMPORTANT: It is highly recommended that employees thoroughly discuss new goals with their manager and receive verbal approval for a goal before entering it in Ignite.

- This document guides staff through the steps to properly create, edit and update individual goals. Goals can be created or updated at any time throughout the year.
- In addition to being created by the employee, goals can be added or assigned by the employee’s manager or shared with them by their manager or another employee. Employees have the option whether to submit shared goals.
- New, edited, or updated goals are submitted for manager approval.
- If changes need to be made to a goal during the approval process, staff can withdraw submitted goals to make edits. Managers can edit their employee’s goal before or after approving.

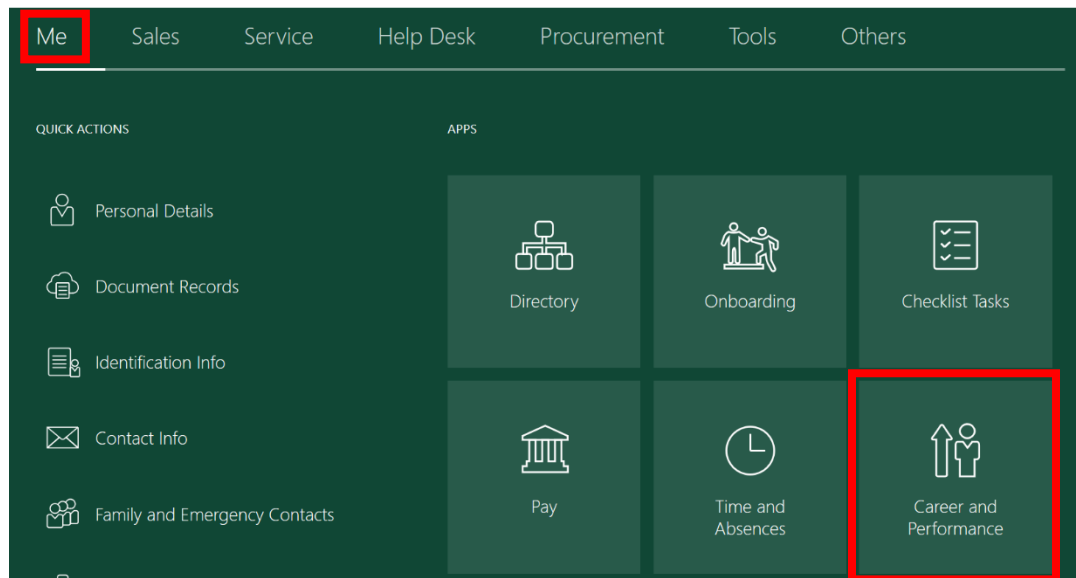
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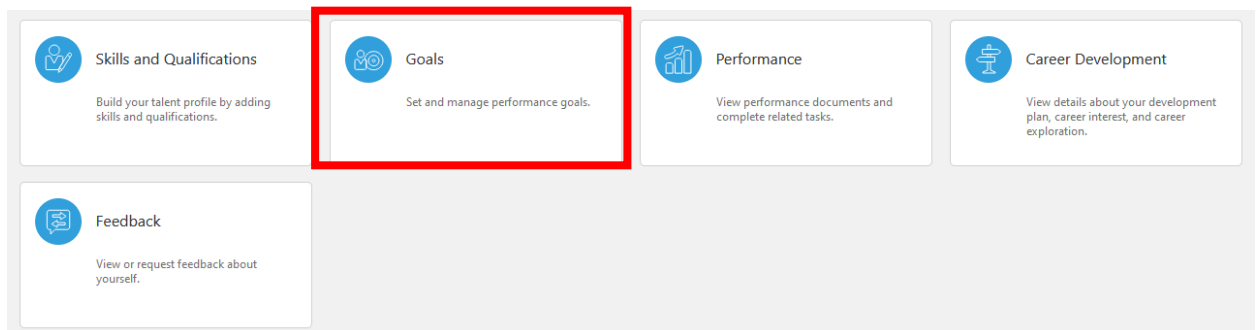
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I. Navigating to the Self-Service Module for Goals

1. **Goals** are in the **Career and Performance** section. Under the **Me** heading on the home page, you can scroll down and click on the **Career and Performance** tile on the main page.



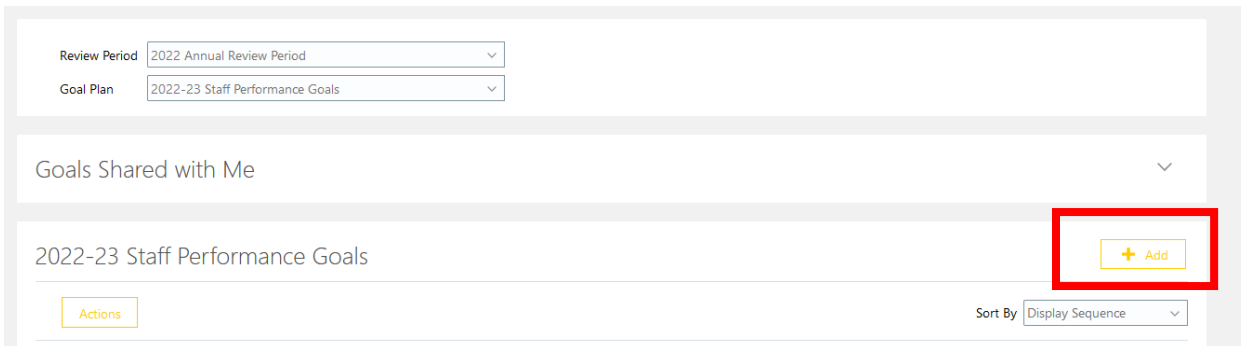
2. Upon entering the **Career and Performance** tile, click on the **Goals** button.



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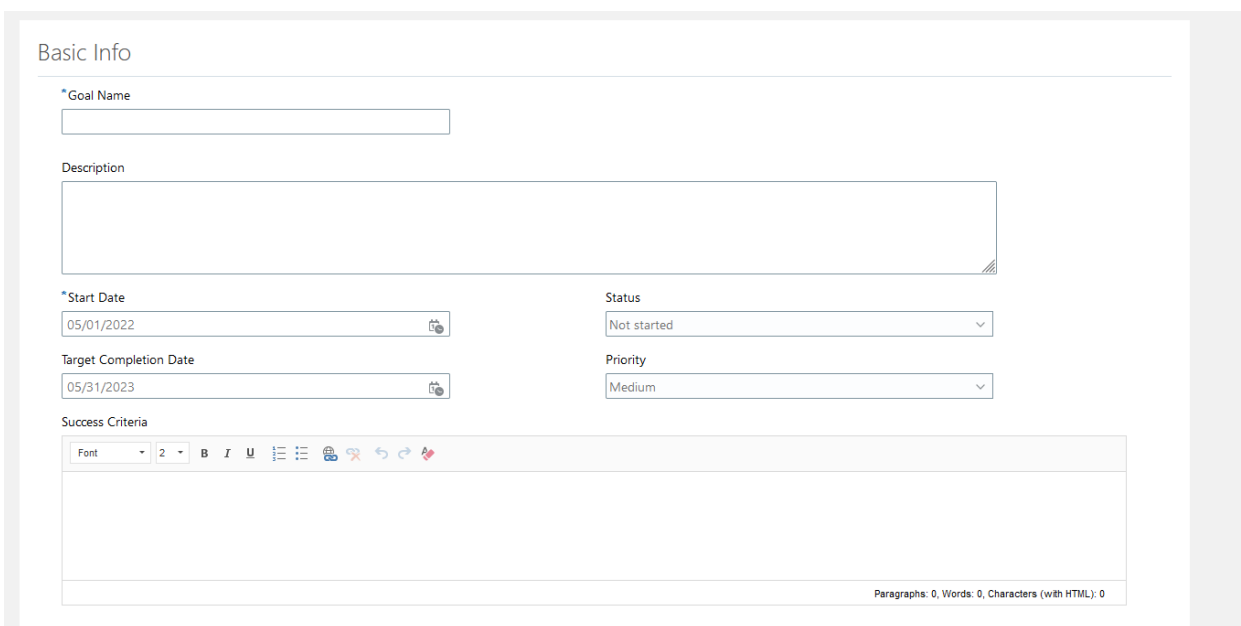
2. Creating Goals

1. On the goals page, click **Add** to create a performance goal.



The screenshot shows the top section of a web interface. At the top, there are two dropdown menus: 'Review Period' set to '2022 Annual Review Period' and 'Goal Plan' set to '2022-23 Staff Performance Goals'. Below these is a section titled 'Goals Shared with Me' with a downward arrow. Underneath, there's a header for '2022-23 Staff Performance Goals'. On the right side of this header, a yellow button with a plus sign and the word 'Add' is highlighted with a red rectangular box. At the bottom left of the header area is a yellow 'Actions' button, and at the bottom right is a 'Sort By' dropdown menu set to 'Display Sequence'.

2. After clicking **Add** to create a performance goal, as described in the previous section, you will see the **Basic Info** screen for the goal. First, type a goal in the **Goal Name** field and complete the remaining fields as appropriate. The only required fields are the Goal Name and Start Date, but it's highly recommended you add a detailed description, success criteria, and change the Start and Target Completion dates, as needed.



The screenshot shows the 'Basic Info' form for creating a goal. It includes the following fields and options:

- Goal Name:** A required text input field.
- Description:** A large text area for entering details.
- Start Date:** A date picker set to 05/01/2022.
- Target Completion Date:** A date picker set to 05/31/2023.
- Status:** A dropdown menu set to 'Not started'.
- Priority:** A dropdown menu set to 'Medium'.
- Success Criteria:** A rich text editor with a toolbar (font, size, bold, italic, underline, list, link, unlink, undo, redo) and a text area. At the bottom right of the editor, it says 'Paragraphs: 0, Words: 0, Characters (with HTML): 0'.

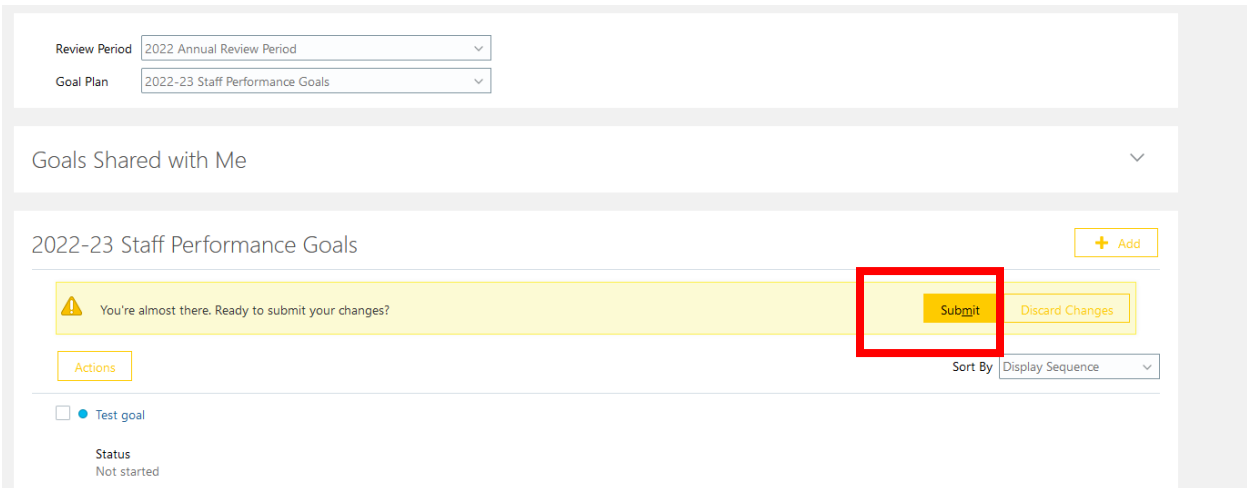
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3. After completing the fields, scroll to the top of the page and click **Save and Close** in the top right-hand corner to create the team goal.



4. In the **Goals** section, select the **Submit** button to send the goal to your manager for approval. It is *highly* recommended that you discuss the goal with your manager and receive verbal approval on the goal *before* submitting it in the system.

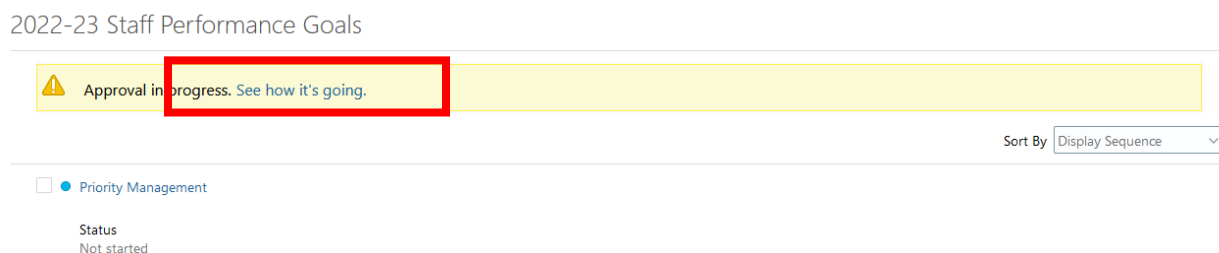
Note: Upon a goal's submission for approval, additional goals cannot be added or changed until the submitted goal has been approved. In order to submit multiple goals at once, enter all other goals as described in previous steps without clicking **Submit**. Once all are entered, select **Submit**. Goals that have not yet been submitted, or have been submitted but not yet approved, are indicated by a blue dot by their name.



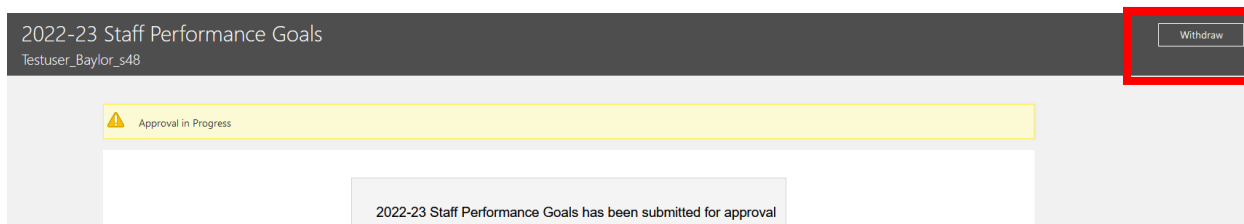
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3. Withdrawing Unapproved Goals to Edit or Delete

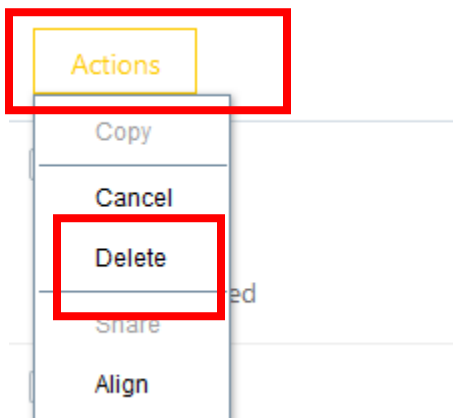
1. If any goal is submitted but not yet approved, it cannot be edited the goal unless first withdrawn. To withdraw, navigate to the **Goals** page as described previously and then click on **See how it's going**.



2. Then, click **Withdraw**. This will withdraw the submission for approval and let you make changes.



3. This will take you back to the **Goals** page. Exit and re-enter the page to refresh it and you will be able to open the goal to edit it following the instructions below. Alternatively, if you want to delete the goal, click the check box next to the goal's name and then select **Delete** from the **Actions** menu.



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4. Updating or Editing Approved Goals

1. If you would like to update the status or make edits to an approved goal, navigate to the **Goals** page as described previously and then click on the name of the goal. This will open the goal.

Actions

Priority Management

Status	Weight
Not started	

2. When the Basic Info page opens, select the **Edit** button.

Basic Info

Edit

Goal Name

3. Make changes to the appropriate fields and click **Save**.

Basic Info

Save

Cancel

*Goal Name

Priority Management

Description

*Start Date

08/15/2021

Status

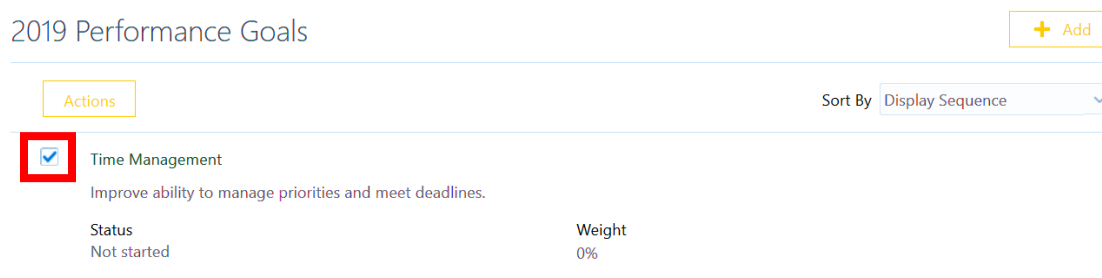
Not started

4. **Submit** the updated goal for approval as described previously.

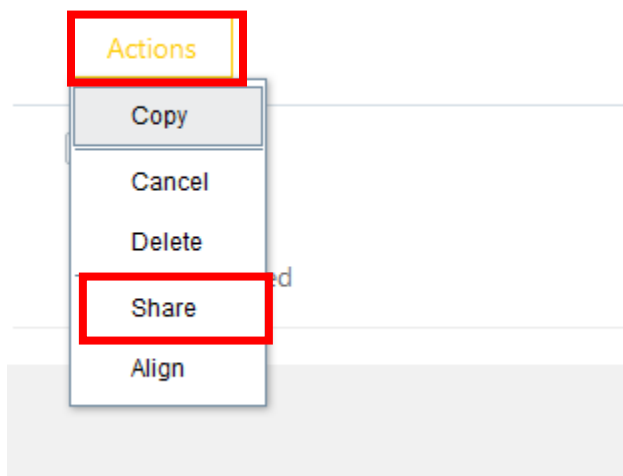
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5. Sharing Goals

- I. It is possible to share one or more of your goals with others as a suggestion or a way to save them time. For example, if you have a goal that would also apply to a co-worker in the same role, you can share it with them. Then they can simply accept it and submit it for approval rather than entering the goal themselves. You can also receive shared goals from co-workers or your manager. As with any performance goal, shared goals still require manager approval. The following steps detail how to share and receive a goal.
 - a. Share a goal by selecting the checkbox next to the goal name of the goal you wish to share.



- b. Select **Share** from the **Actions** drop down. Note: You can also **Cancel** or **Delete** goals from this screen.



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- c. Decide who to share the goal with, such as, direct reports who will auto populate, however, you can share with anyone. Select a worker from the dropdown or type the name in manually. Then check the task box and the worker box.

Selected Goals

Time Management

Share tasks

Share Goals With

Add Worker



Ms. Zoe Nagle
Manager, Compliance

- d. Click the **Submit** button.

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6. Receiving Shared Goals

1. Shared **Goals** will show up in the **Goals Shared With Me** section of the Goals tile. Receive a goal by checking the box next to the goal name and selecting the **Add as My Goal** button under the **Goals Shared with Me** tab.

Goals Shared with Me

Add as My Goal

Manager Goals

<input checked="" type="checkbox"/>	TE Time Management Improve ability to manage priorities and meet deadlines.	Shared By Mr. Testuser_BAYLOR_s39	Shared Date 12/09/2019
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2. Select which **Goal Plan** you wish to add this shared goal to from the dropdown (use the default or current year goal plan). Then select **Save and Close**.

TE Add Shared Goals

Save and Close Cancel

Selected Goals

TE Time Management Improve ability to manage priorities and meet deadlines.	Shared By Mr. Testuser_BAYLOR_s39	Shared Date 12/09/2019
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Add Goals To

*Goal Plan

2019 Performance Goals

3. Complete the submission steps and the goal will be submitted to your manager for approval.