

# Approving and Managing Employee and Team Goals

## Overview

- This job aid is intended for managers to approve or manage goals for their direct reports.
- Goals submitted or edited by employees will require manager approval in Ignite. **Please note, it is strongly recommended to discuss and give verbal approval for a goal before the employee enters it in the system or makes updates or edits.**

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# Approving and Managing Employee and Team Goals

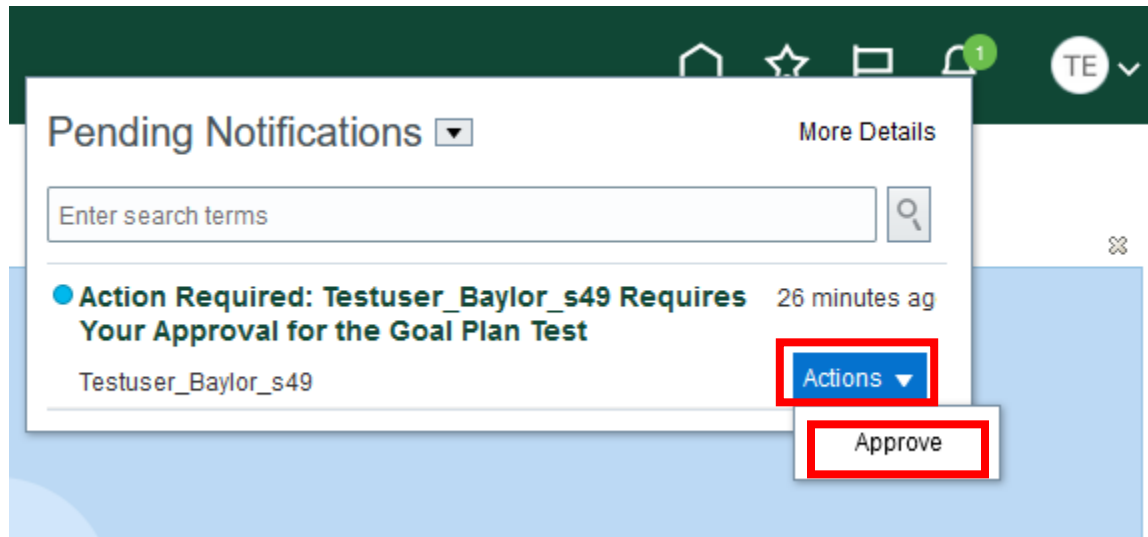
## I. Approve Goals Using the Bell Notification

When an employee submits a new, edited, or updated goal, the manager can view and approve either using the **Bell notification** or the **Career and Performance Page** under **My Teams**. The Bell notification is the easiest method.

1. To use the **Notification Bell**, click the bell icon in the upper right-hand corner of the screen to check for notifications.

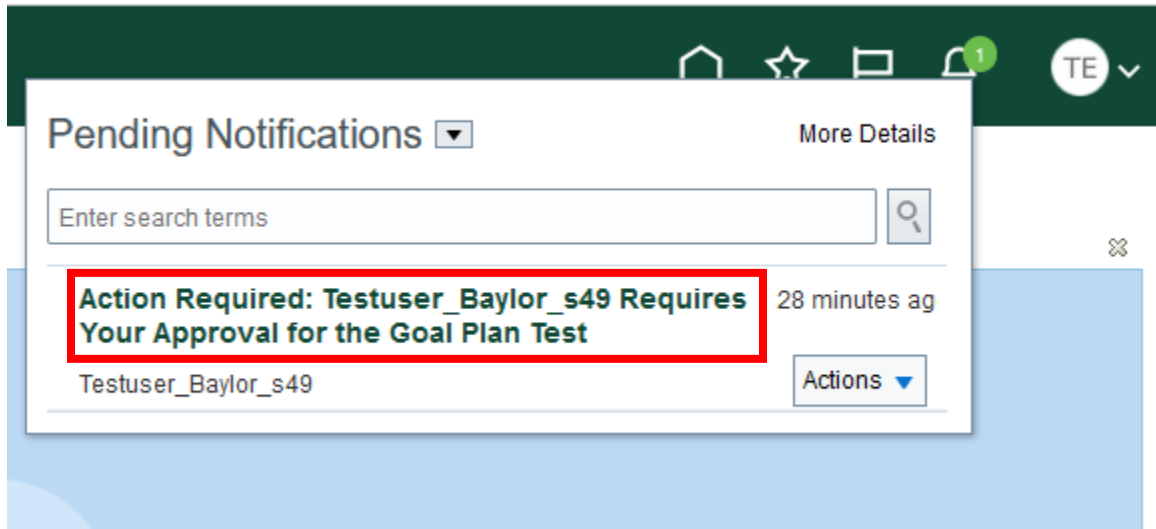


2. After clicking the notification bell, simply click **Actions** dropdown, then the **Approve** button to approve the goal.



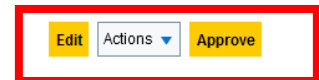
3. Alternatively, you can click on the name of the alert to see more details.

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- From here you can **Edit** or **Approve** the goal. Note: if multiple goals were submitted at once, they will all be approved at the same time. Additionally, if you want the employee to make changes to the goal before approving, you can either edit it yourself or ask the employee to withdraw the goal, edit, and resubmit.

Testuser\_Baylor\_s49 Requires Your Approval for the Goal Plan Test



## Testuser\_Baylor\_s49 Goal Plan Approval Request

Worker Testuser\_Baylor\_s49 has submitted Test for your approval

Review Period Disclosure Review Period

Goal Plan Test

### Added Goals test

Goal Name	test
Status	Not started
Start Date	2021-08-15
Target Completion Date	

### Approval History

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5. Click **Submit**. Note: although you can add additional comments when approving the goal, it is not recommended as the employee may not see them. If you need to communication with the employee regarding the goal, it is better to use email or do so in person.

Approve

Submit

Cancel

Comment



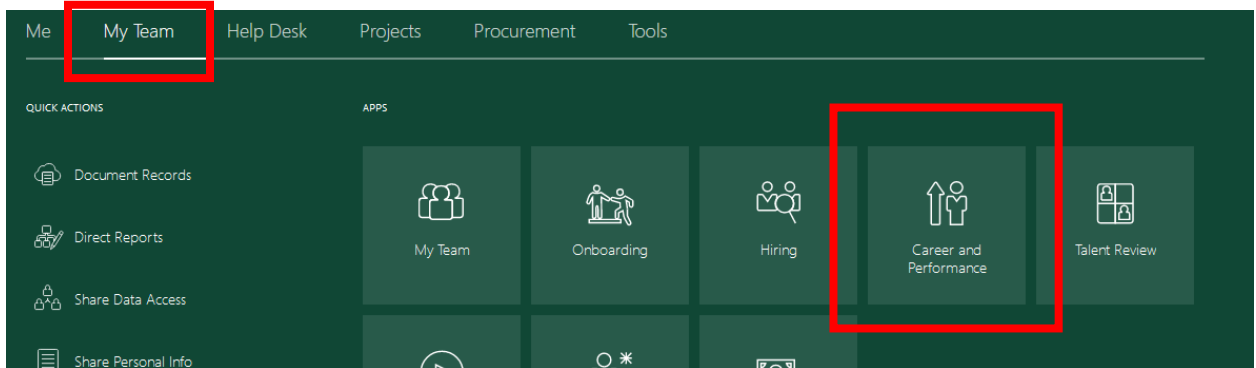
Drag files here  
or click to add  
attachment



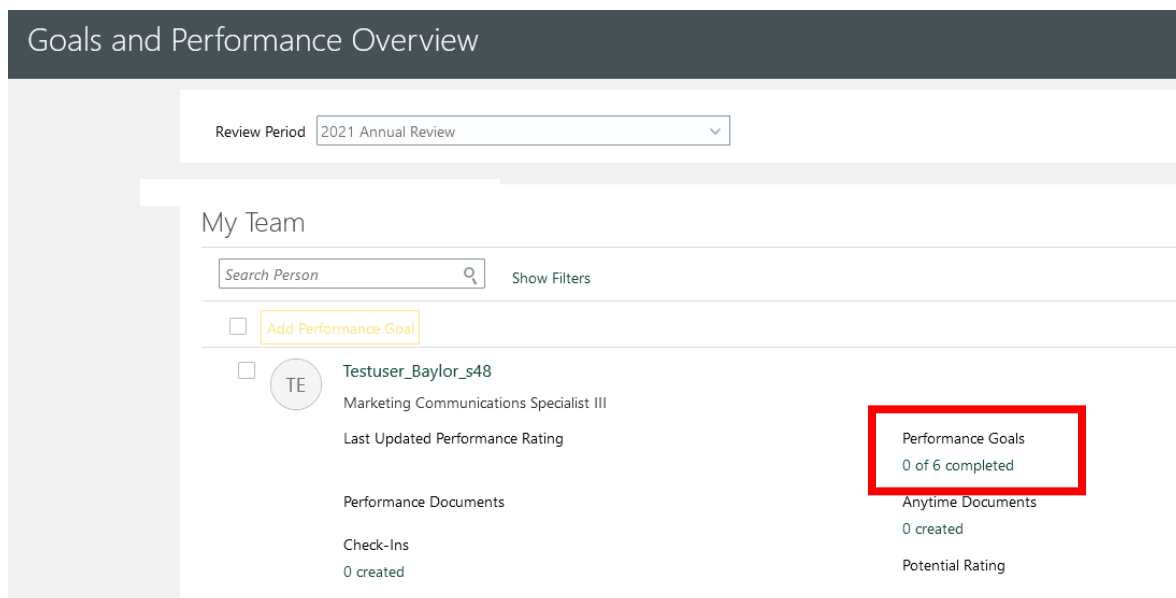
# Approving and Managing Employee and Team Goals

## 2. Approve Goals Through Career and Performance in My Teams

1. You can access the **Career and Performance** tile under the **My Team** heading on the home page.



2. On the **Goals and Performance Overview** page there will be a list of direct reports. In the section for the specific employee, click on the hyperlink under **Performance Goals** indicating the number of goals completed. This will take you to the employee's personal goal page.

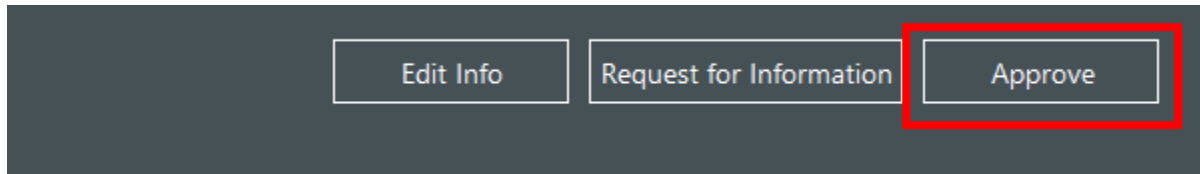


# Approving and Managing Employee and Team Goals

3. Click **See details**.



4. On this screen you will be able to see details about the goal. In the upper right of the screen, click **Approve**.



# Approving and Managing Employee and Team Goals

## 3. Declining New or Updated Goals

No employee goal can be entered or updated without the manager's approval. However, there isn't a direct way to decline a goal or return it to the employee for editing. That's why it's highly recommended for the employee to discuss the goal with you in advance and receive verbal approval prior to entering into Ignite.

That said, there are at least three options for the manager ensure the goal is written or updated correctly:

1. Manager asks employee to withdraw goal, edit, and resubmit. The employee can withdraw any unapproved goal and delete it or edit and resubmit.
2. Manager makes edits to the goal prior to approving. See Section 4 for instructions.
3. Manager approves the goal and then make edits after approving. See Section 4 for instructions.

# Approving and Managing Employee and Team Goals

## 4. View/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.
2. On the **Goals and Performance Overview** page there will be a list of direct reports. In the section for the specific employee, click on the hyperlink indicating the number of goals completed under **Performance Goals**. This will take you to the specific employee's goal page.

Goals and Performance Overview

Review Period: 2021 Annual Review

My Team

Search Person  Show Filters

Add Performance Goal Sort By: Name ascending

<input type="checkbox"/>	<b>TE</b> Testuser_Baylor_s48 Marketing Communications Specialist III Last Updated Performance Rating	<b>Performance Goals</b> 0 of 6 completed
	Performance Documents	Anytime Documents 0 created
	Check-Ins 0 created	Potential Rating

3. 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%



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

Basic Info



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

5. 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



\*Goal Name

Priority Management

Allow worker to update key attributes

Description

Empty text area for description.

\*Start Date

06/01/2020

Status

Not started

Target Completion Date

05/07/2021

Weight

0

Category

Select a value

Success Criteria

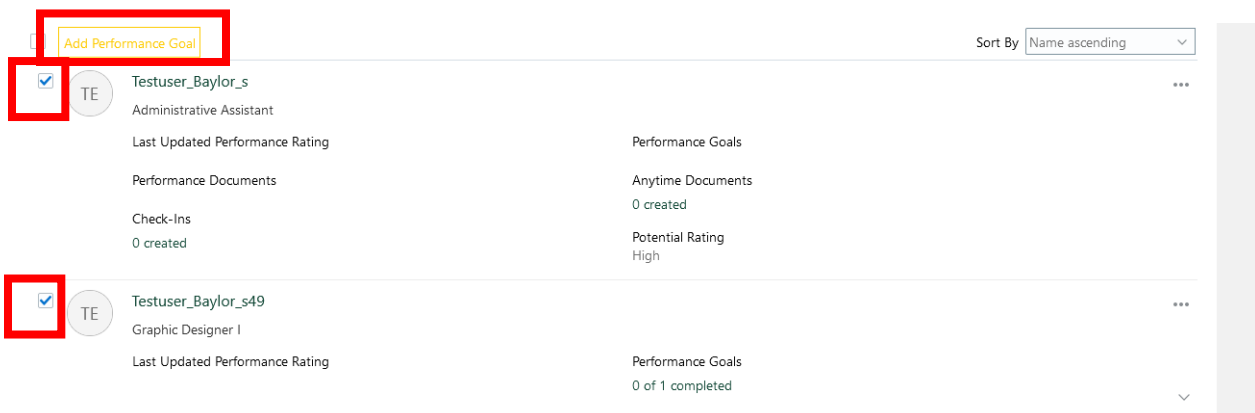
Rich text editor toolbar with options for font, size, bold, italic, underline, list, link, unlink, undo, redo, and insert.

# Approving and Managing Employee and Team Goals

## 5. Create Goals for Individual or Multiple Employees

You can create and add a goal for one or more of your employees.

1. Navigate to the **Goals and Performance Overview Page** under **My Team** as previously described. Check the box by the employee(s) you'd like to create a goal for. Then select **Add Performance Goal**.

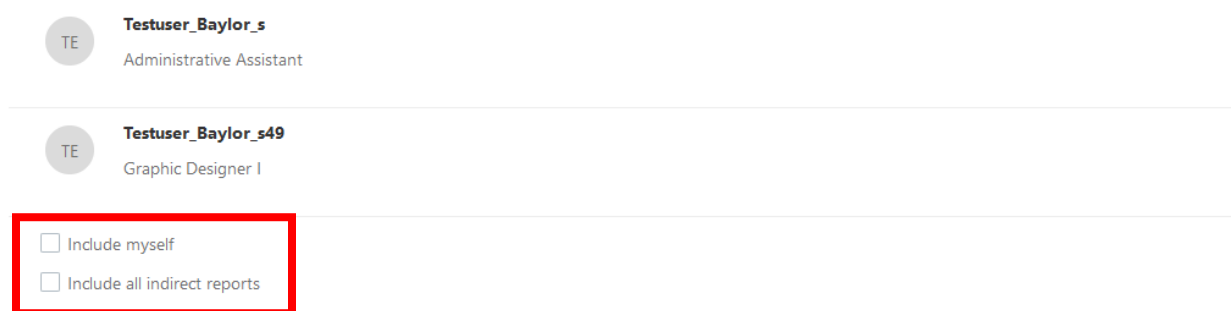


The screenshot shows a table of employees with the following columns: Employee Name, Last Updated Performance Rating, Performance Documents, Check-Ins, Performance Goals, Anytime Documents, and Potential Rating. The 'Add Performance Goal' button is highlighted in red. Two employees are selected with checkboxes: Testuser\_Baylor\_s (Administrative Assistant) and Testuser\_Baylor\_s49 (Graphic Designer I).

Employee	Last Updated Performance Rating	Performance Documents	Check-Ins	Performance Goals	Anytime Documents	Potential Rating
<input checked="" type="checkbox"/> Testuser_Baylor_s Administrative Assistant			0 created		0 created	High
<input checked="" type="checkbox"/> Testuser_Baylor_s49 Graphic Designer I				0 of 1 completed		

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. You can also assign the goal to yourself or indirect reports at the same time.

### Selected Employee



The screenshot shows the 'Selected Employee' popup with two employees listed: Testuser\_Baylor\_s (Administrative Assistant) and Testuser\_Baylor\_s49 (Graphic Designer I). Below the list are two checkboxes: 'Include myself' and 'Include all indirect reports', both highlighted in red.

### Basic Info



The screenshot shows the 'Basic Info' section with a 'Goal Name' input field and a checked checkbox for 'Allow worker to update key attributes', both highlighted in red.

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3. Scroll down to view Basic Info. In this step, you will add goal details. Complete the following optional and required fields:

## Basic Info

\*Goal Name   Allow worker to update key attributes

Description

\*Start Date  Status

Target Completion Date

Success Criteria

Font  **B** *I* U

4. 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

Save and Close

Cancel

# Approving and Managing Employee and Team Goals

## 6. Share Manager Goals with Direct Reports

*Sharing a Goal:* A manager 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. If they choose to add it to their goal plan, it will be submitted back to you for approval.

1. On the main page, select **Career and Performance** under the **Me** tab and then select the **Goals** tile. When the **Goals and Performance** page opens, share a goal by selecting the checkbox next to the goal name of the goal you wish to share.

2019 Performance Goals + Add

Actions Sort By Display Sequence

<input checked="" type="checkbox"/>	Time Management Improve ability to manage priorities and meet deadlines.	Status Not started	Weight 0%
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2. Select **Share** from the **Actions** drop down. Note: You can also **Cancel** or **Delete** goals from this screen.

Actions

- Copy
- Cancel
- Delete
- Share
- Align

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3. Decide who to share the goal with. 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



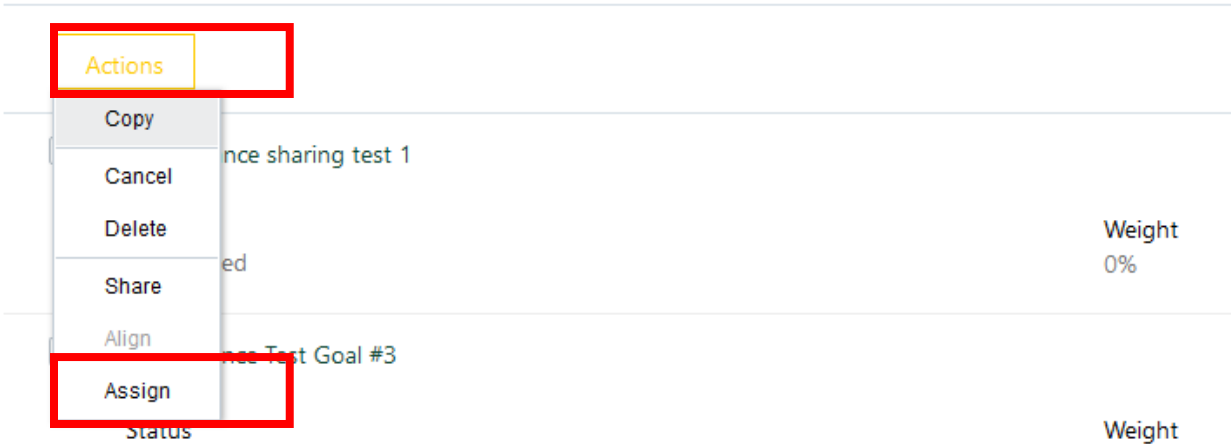
Ms. Zoe Nagle  
Manager, Compliance

4. Click the **Submit** button.

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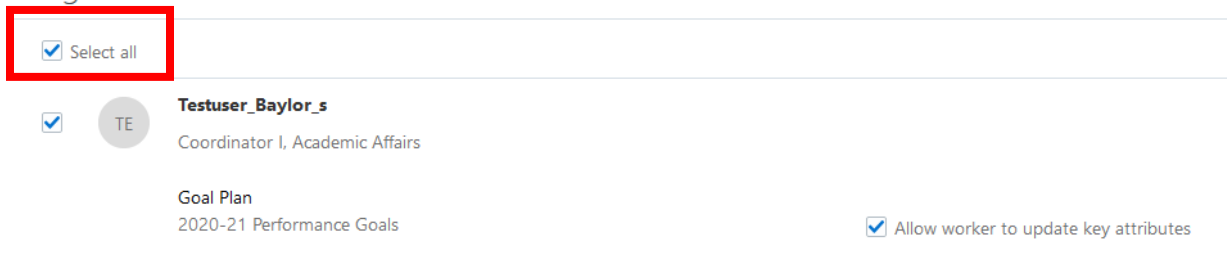
## 7. Assign Manager Goals to Direct Reports

*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**.



Also, a manager can assign a goal to their entire team by checking the **Select All** box or to specific employees by selecting them individually.

### Assign To



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## 8. Cancel or Delete a Direct Report's Goals


As manager, you can cancel or delete goals on your employee's goal plan. 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. Note: that you will only be able to delete goals you have added. The employee will have to delete goals he or she has added.

1. Navigate to the **Career and Performance** tab under **My Team**. This action is detailed in the first process of this document.
2. On the **Goals and Performance Overview** page, find the employee and click on the hyperlink under **Completed Goals**. This will take you to the specific employee's goal page.

My Team

Search Person  Show Filters

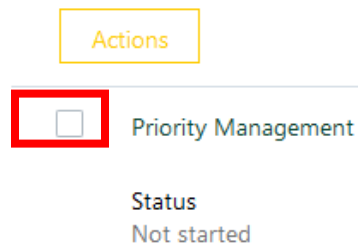
Add Performance Goal Sort By Name ascending

<input type="checkbox"/>	 Testuser_Baylor_s48 <span style="float: right;">...</span>
Last Updated Performance Rating Area of Mastery	<b>Performance Goals</b> 0 of 1 completed
Performance Documents 2021 Staff Annual Evaluation	Anytime Documents 0 created
Check-Ins 0 created	Potential Rating Medium

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3. Select the checkbox next to the goal name, and click the **Actions** button from the drop-down menu. Then click **Cancel** or **Delete**.

## 2020-21 Performance Goals

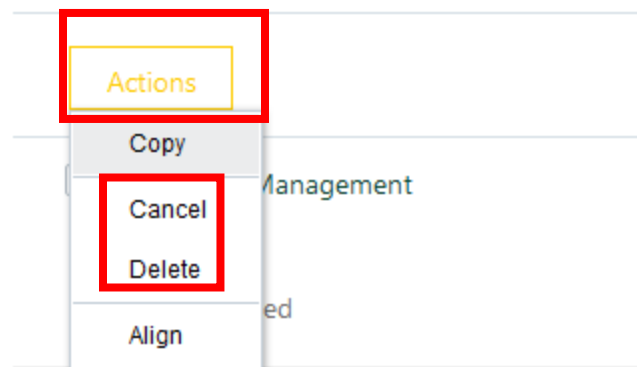


Actions

Priority Management

Status  
Not started

## 2020-21 Performance Goals



Actions

Copy

Cancel

Delete

Align

Management

ed

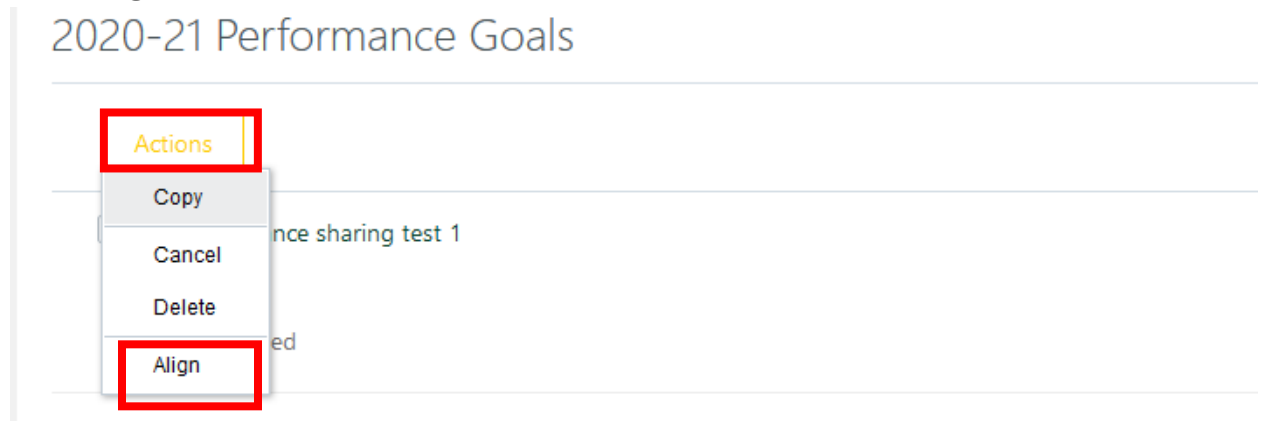


# Approving and Managing Employee and Team Goals

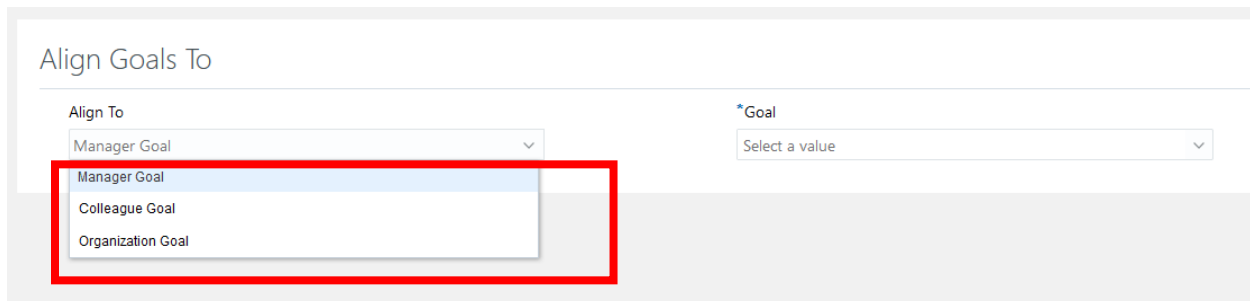
## 9. Align a Goal for a Direct Report

*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. Follow the steps in the previous section.
2. To align a goal, select the checkbox next to its name, and click the **Actions** drop-down. Click **Align**.



3. 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**.



4. The employees' goal has successfully been aligned.