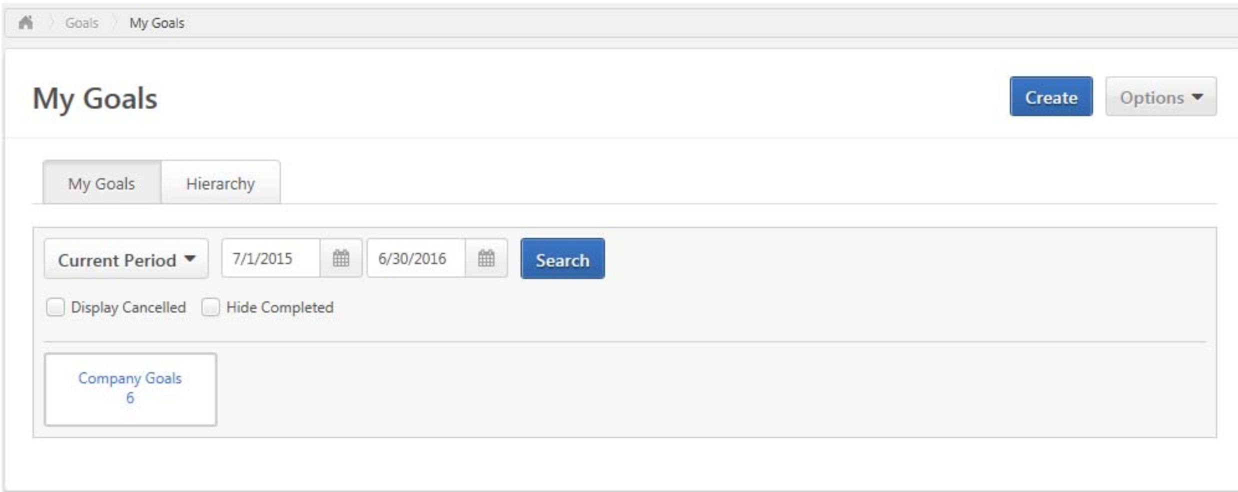
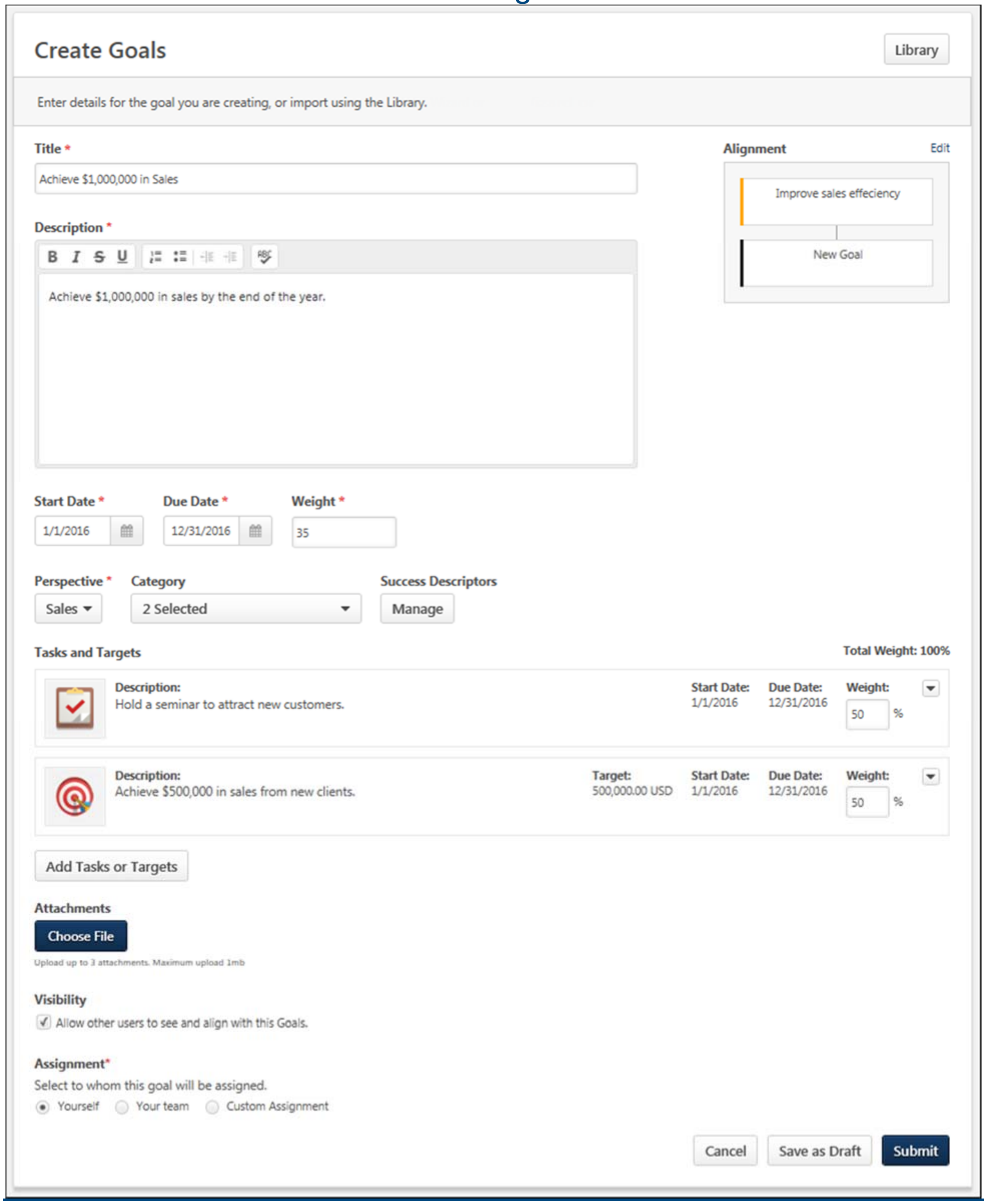
New Look for the My Goals Page



New Look for the Create Goals Page



How to Create or Edit a Goal

To create a goal, go to PERFORMANCE > GOALS. Then click the **CREATE** button.

To edit a goal, go to PERFORMANCE > GOALS. Click the Actions menu icon to the right of the appropriate goal and select Edit.

To align your goal with another goal, click the **ALIGN GOAL** button within the Alignment widget.

To edit the goal alignment, click the **Edit** link above the Alignment widget. This opens the Alignment pop-up.

Note: *Any modifications to a goal's alignment are not saved until the goal is saved.*

Enter the following general information for the goal:

- **Title** - Enter the title for your goal that will appear on the My Goals page as well as anywhere else your goal is visible. This field is limited to 1,000 characters.
- **Description** - Enter an overview of the goal, including any objectives or parameters. This field can be formatted using the text formatting buttons and is limited to 10,000 characters.
- **Start Date and Due Date** - Click the Calendar icon to select the date on which the goal should be started and the date by which the goal should be completed. The Start Date must be before the goal Due Date. If this goal is being aligned to another goal, these dates must be within the Start and Due Date of the parent goal. When you view your goals or run goal related reports, the Start Date and Due Date are used to determine which goals are included. If any part of a goal falls within the specified time frame, the goal will display.
- **Weight** - Enter a weight for your goal between 0 and 100. Weighting allows you to place a greater value on certain goals. For example, if you have four goals for a review period and they are valued equally, you should assign them each a weight of 25%. Similarly, if one goal is more important than the others, you may give that goal a weight of 40% and assign the other three a weight of 20%. The heavier weighted goal will count more towards your overall goal progress than the other three. The weight percentage field can accept up to two decimal places.
- **Success Descriptors** - Success descriptors allow you to define how you deem success in relation to the goal. Click the **MANAGE** button to customize the success descriptors for the goal.

How to Add Tasks and Targets to a Goal

Tasks and targets enable users to break down the different steps that are needed to accomplish the goal and to make the goal more clear to the user's performance manager.

To add a task or target to the goal, click the **ADD TASKS OR TARGETS** button.

Once tasks and targets are added to a goal, they are displayed in the *Tasks and Targets* section.

The **Weight** field displays the weight that was entered when the task or target was created. However, you can continue to update the weight of each task and target until the goal is saved. The total weight of all tasks and targets is displayed in the upper-right corner of the *Tasks and Targets* section. When the goal is saved, the total weight must be equal to 100%.

To edit a task or target, click Actions menu icon to the right of the appropriate task or target and select Edit.

To delete a task or target, click Actions menu icon to the right of the appropriate task or target and select Delete. A task or target is not permanently deleted until the goal is saved.

How to Add Attachments to a Goal

You can attach any documents that are relevant to the goal. This enables you to include more details or references that support the goal so that anyone viewing the goal can view the resources if they are evaluating or aligning to the goal.

- Up to three attachments can be added to a goal.
- The maximum file size is 1 MB.
- Attachments can be avi, bmp, csv, doc, docx, gif, jpg, jpeg, jpe, mov, pdf, png, ppt, pptx, txt, xls, xlsx, and zip.

You can attach a file by dragging and dropping a file into the Attachment area. You can also attach a file by clicking the **CHOOSE FILE** button and select a file from your computer. **Note:** *The drag-and-drop functionality is not supported by Internet Explorer browsers.*

After the file is attached, the attachment appears in the *Attachments* section.

An attachment can be removed by clicking the Cancel icon to the right of the attachment name.

How to Set the Visibility of a Goal

Select this option to allow other users to see your goal and align their goals with it. This is generally used by managers to allow their direct reports to view manager goals and align their individual goals with them, but other users can use this function to align with each other.

How to Assign a Goal

When creating a goal, managers are able to create a goal and assign it to members of their team, to the entire organization, to an organizational unit (OU) or group, or to specific users. If the *Assignment* section is not available when creating a goal, then the goal is automatically assigned to the user who is creating the goal.

When editing a goal, the *Assignment* section is not available. However, users can edit the goal manager for goals which they created.

- o Yourself - Select this option to assign the goal to yourself. This option is selected by default. When the goal is approved, this goal will appear in the *My Goals* section of the My Goals page where you can edit and manage it. This goal will also appear in your performance review.
- o Your Team - Select this option to assign the goal to members of your team.
- o Custom Assignment - Select this option to assign the goal to the entire organization, to an OU or group, or to specific users.

How to Add a Comment to a Goal

When editing a goal, the *Comments* section is available. (This section is not available when creating a goal.)

The *Comments* section allows you and your manager to add comments related to all aspects of your goal. For example, you may add a comment to explain your recent efforts toward this goal. You manager can then reply to your comments or they can add an unrelated comment.

Comments are displayed with the user's profile picture and a timestamp. The three most recent comments are displayed by default, including replies to those comments. In order to view any additional comments, click the **Show previous** link.

To add a new comment, click the **Add Comment** link. This adds a field in which you can add your comment. After entering your comment, click **ADD** to add the comment to the goal.

To reply to a comment, click the Reply icon below the comment. This adds a field in which you can add your reply. After entering your reply, click **REPLY** to add the reply to the comment.

To delete a comment you have added, select **Delete** from the Options drop-down menu . You can delete any comments that you have added.

To edit a comment you have added, select **Edit** from the Options drop-down menu .

How to Submit a Goal /Save a Goal as Draft/Cancel a Goal

Click **SUBMIT** to create the goal or to submit any modifications. When a goal is submitted, the goal status is Pending Approval, and you must click the **SEND APPROVAL REQUEST** button on the My Goals or Snapshot Goals page to send an email to the approver (if the corresponding email is active). If goal approval is not required or if a goal approver is not set, your goal is automatically approved.

Click **SAVE AS DRAFT** to save the goal without submitting it. The goal will be saved for you to continue creating later, but the goal will not be submitted and will not be visible to anyone but yourself. If the goal is configured to be assigned to another user, the goal is not yet assigned. The goal is only assigned once it is submitted.

- o When saving a goal as a draft, the **Title** and **Weight** fields are required.

Click **CANCEL** to cancel the goal creation process. When editing a goal, this discards any unsaved changes.

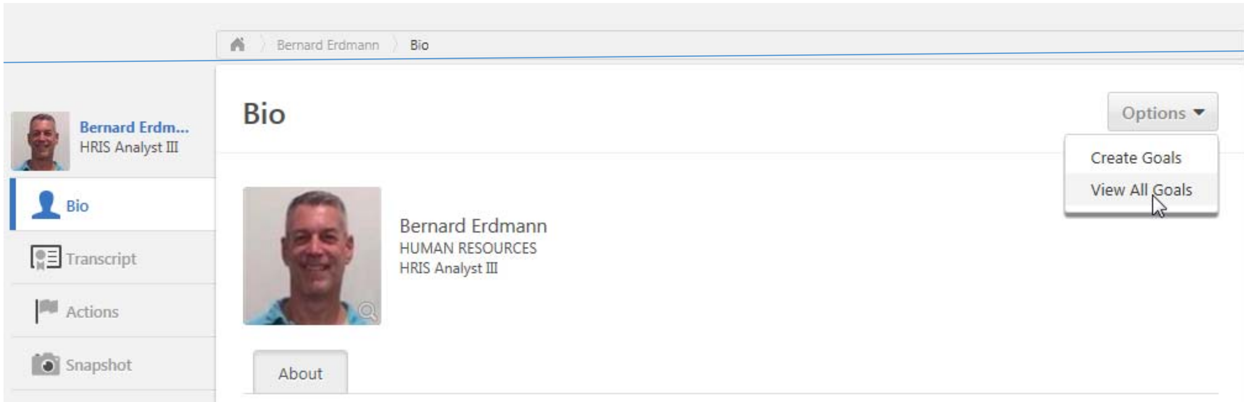
How to Send an Approval Request Email

The **SEND APPROVAL REQUEST** button is available in the upper-right corner of the page if you have goals that are pending approval. Click this button to send an email to your goal approver if the Request Goal Approval email is enabled. Once the request is sent, the button text is updated to "Request Sent" until the page is refreshed.

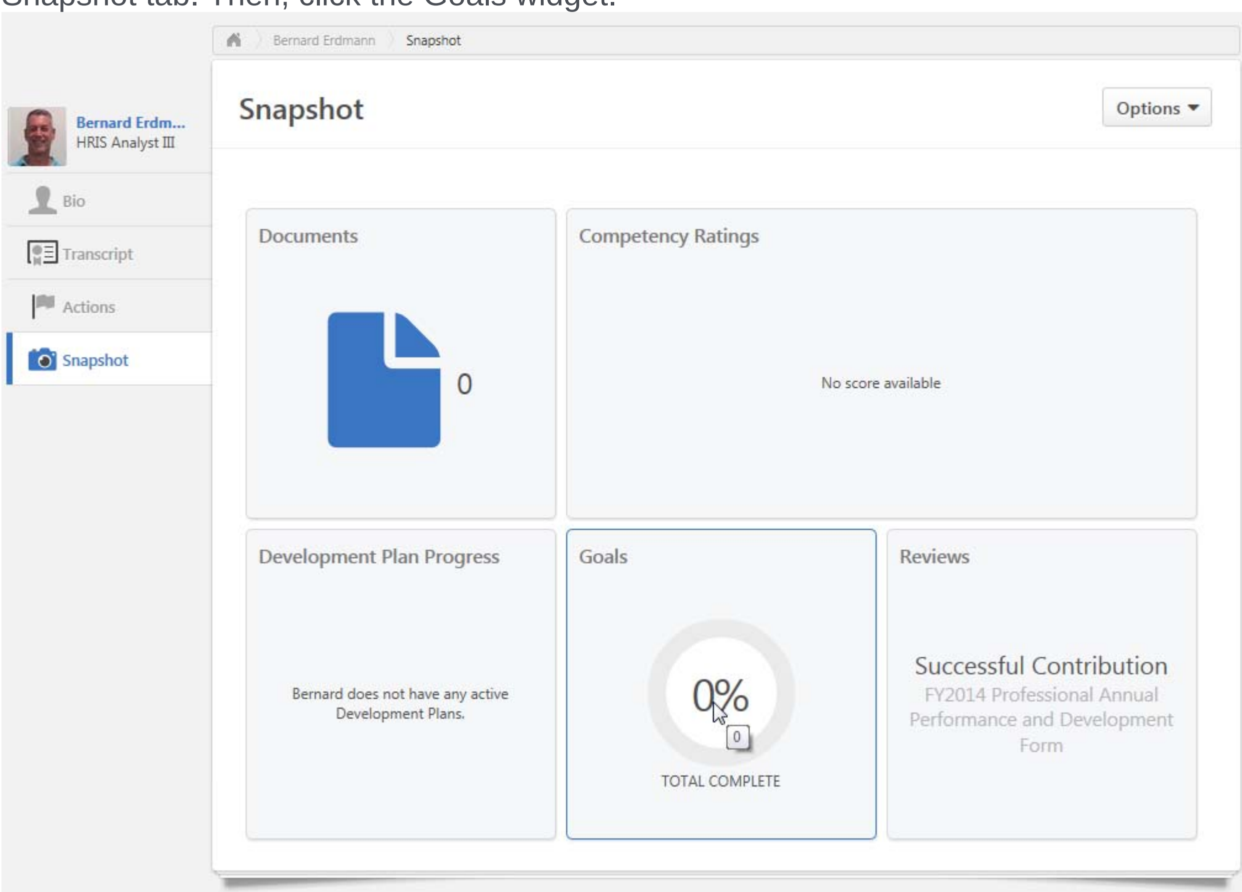
New Functionality! Universal Profile Snapshot

There are two new ways to get to Goals via Universal Profile, from either the Bio tab or the Snapshot tab.

Throughout Universal Profile, the Options drop-down menu contains a View All Goals option. The View All Goals directs users to the Snapshot Goals page.

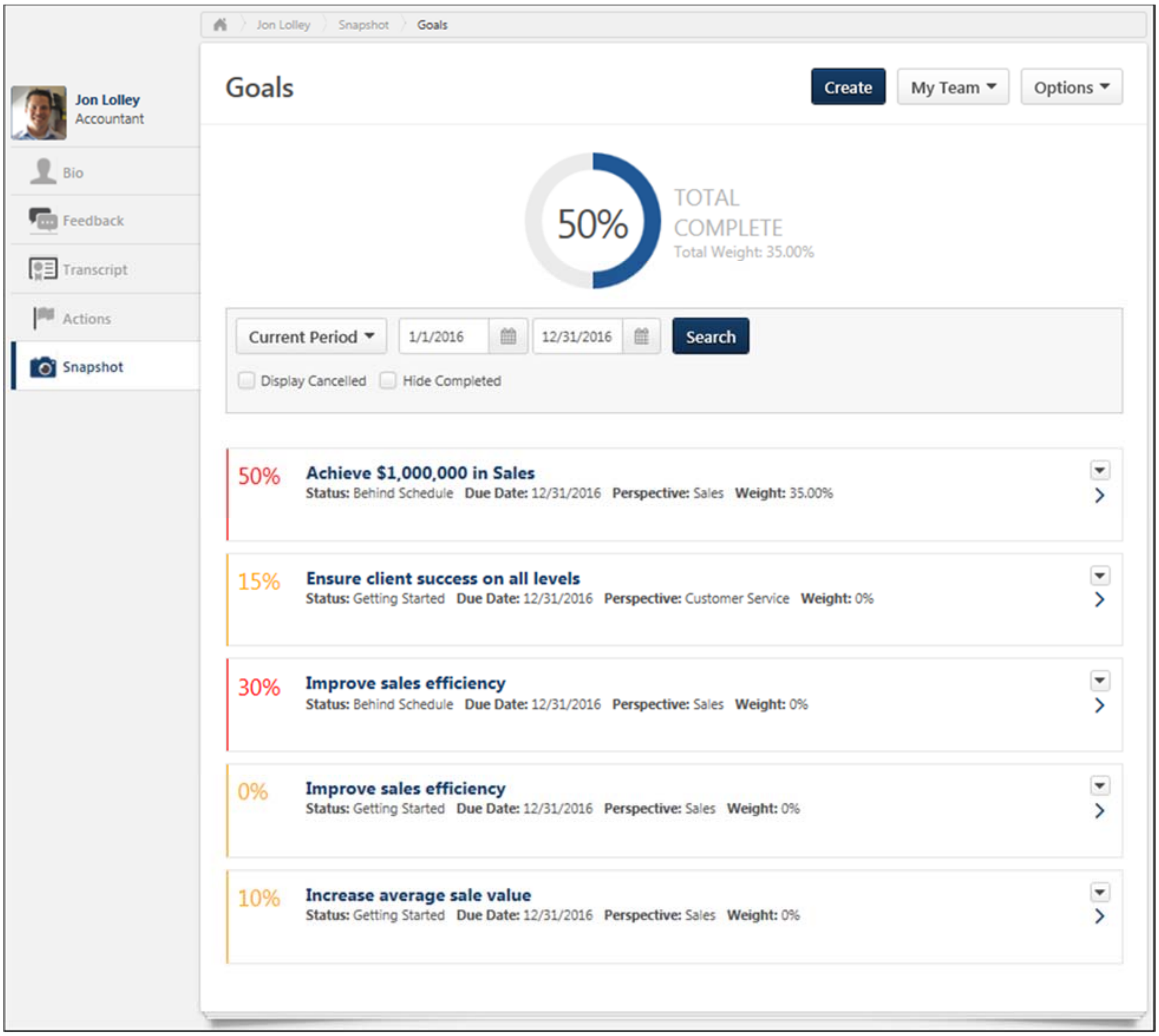


To access the Snapshot Goals page, go to HOME > UNIVERSAL PROFILE. Click the Snapshot tab. Then, click the Goals widget.



The Snapshot Goals page enables users, managers, and administrators to view a summary of the user's goals. Users can also create goals, view goal details, and update goal progress.

The option to create a goal is visible on the Snapshot Goals page. Also, users have the ability to view the details of a goal, add comments and attachments to a goal, and update goal progress.



How to Create a Goal in Snapshot

To access the Snapshot Goals page, go to HOME > UNIVERSAL PROFILE. Click the Snapshot tab. Then, click the Goals widget.

To create a new goal, click the **CREATE** button in the upper-right corner of the page.

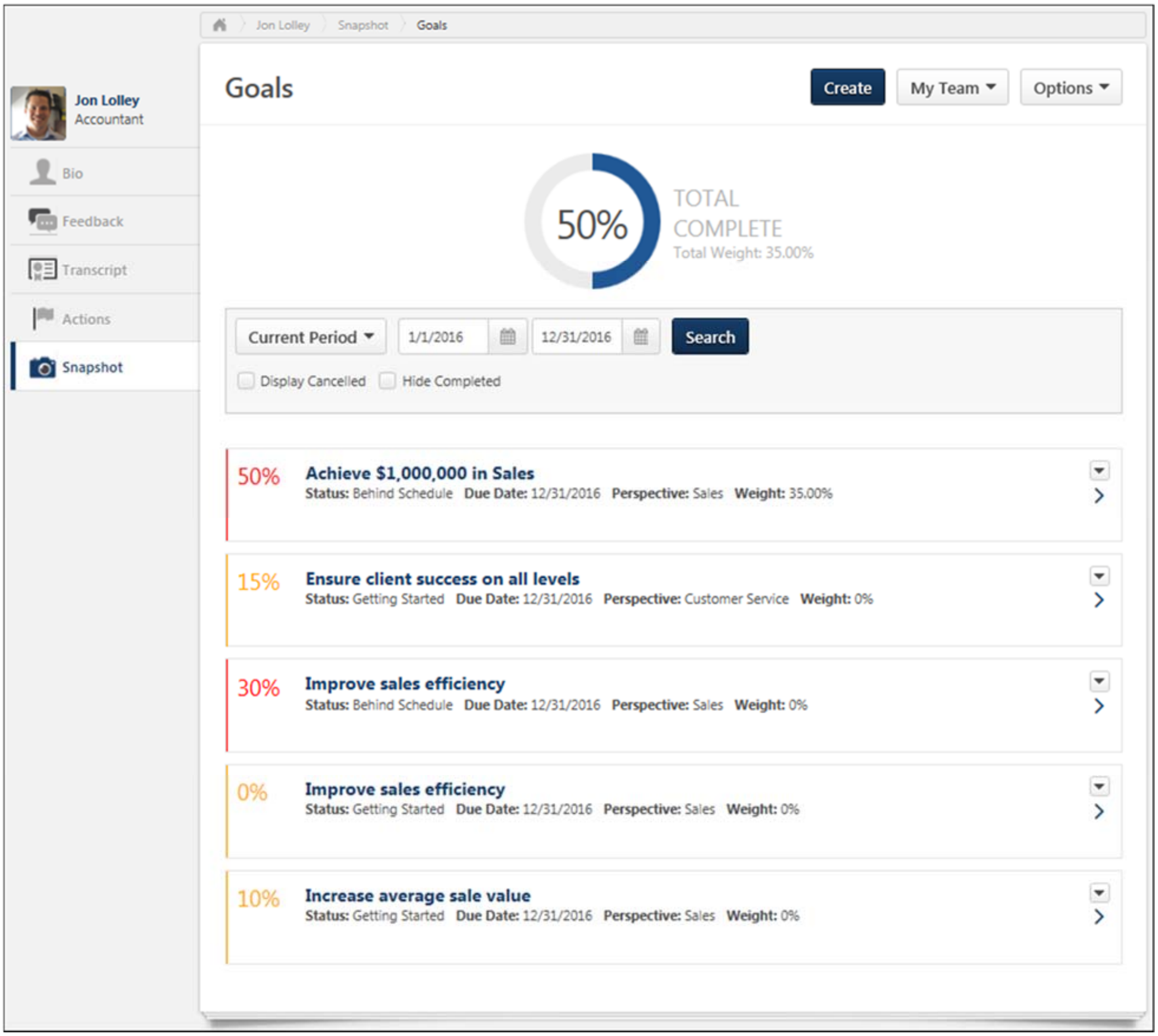
How to Manage a Goal in Snapshot

To update goal progress, add comments or attachments to a goal, or view goal details, click the goal title or click the Right arrow ❯ to the right of the goal.

Goal Actions in Snapshot

The following actions are available from the Options drop-down menu ▾ to the right of the goal:

- Edit - Select this option to edit the goal. This option is only available if enabled by the system administrator and the goal is not locked.
  - Shared goals cannot be edited by anyone other than the goal owner.
- Copy - Select this option to copy the goal. All of the goal details are copied to the new goal except for the Assignment, Alignment, Attachments, and Comments. Also, the Start Date and End Date are set to the default values. This option is only available if you have permission to create goals and the goal is not expired. Also, this option is not available if goals are locked.
- Cancel - Select this option to cancel the goal. A confirmation pop-up opens to confirm the cancellation. This option is only available if enabled by the system administrator. Also, this option is only available for unlocked, non-draft goals.
  - If cancellation approval is not required, then the goal's status becomes Canceled.
  - If cancellation approval is required, then the goal's status becomes Pending Cancellation Approval, and the Request Goal Approval email is triggered if it is enabled.
  - Shared goals cannot be canceled by anyone other than the goal owner.
- Advance - Select this option for an expired goal to copy the details of the goal and set the Start Date and End Date to the next goal period. The goal progress is reset for the new goal. For example, if the expired goal had a start and end date of 01/01/15-12/31/15, once you advance the goal, the new start and end date will be 01/01/16-12/31/16 and the goal progress is set to zero. This action is intended to help save time creating goals for the new goal period if they are similar to the previous period. This option is only available if you have permission to create goals and the goal is expired. Also, this option is not available if goals are locked.
- View History - Select this option to view the history of the goal. The name of the user who updated the goal is included with the type of update and the date and time of the update.

o 

How to Manage a Goal in Snapshot

To update goal progress, add comments or attachments to a goal, or view goal details, click the goal title or click the Right arrow to the right of the goal.

How to Lock or Unlock a Goal Results in Snapshot

The ability to lock a goal is only available when viewing the Snapshot Goals page for a direct report.

A Lock icon should appear to the right of a direct report's goal. Managers can click this icon to lock or unlock the goal. The following statuses are available:

- Locked - This indicates that the goal is locked. Users cannot update the goal progress or edit the goal. Managers may lock a goal at the end of the goal period or at the beginning of a review period. This prevents any miscommunication between the manager and employee. Click this icon to unlock the goal.

- Unlocked - This indicates that the goal is unlocked. Users can update the goal progress and edit the goal. Click this icon to lock the goal.

How to Send a Goal Approval Request in Snapshot

Users can now request approval for their goals from the Snapshot Goals page. (Previously, this was only available on the Goals main page.)

The **SEND APPROVAL REQUEST** button is available in the upper-right corner of the page if you have goals that are pending approval. Click this button to send an email to your goal approver if the Request Goal Approval email is enabled. Once the request is sent, the button text is updated to "Request Sent" until the page is refreshed.