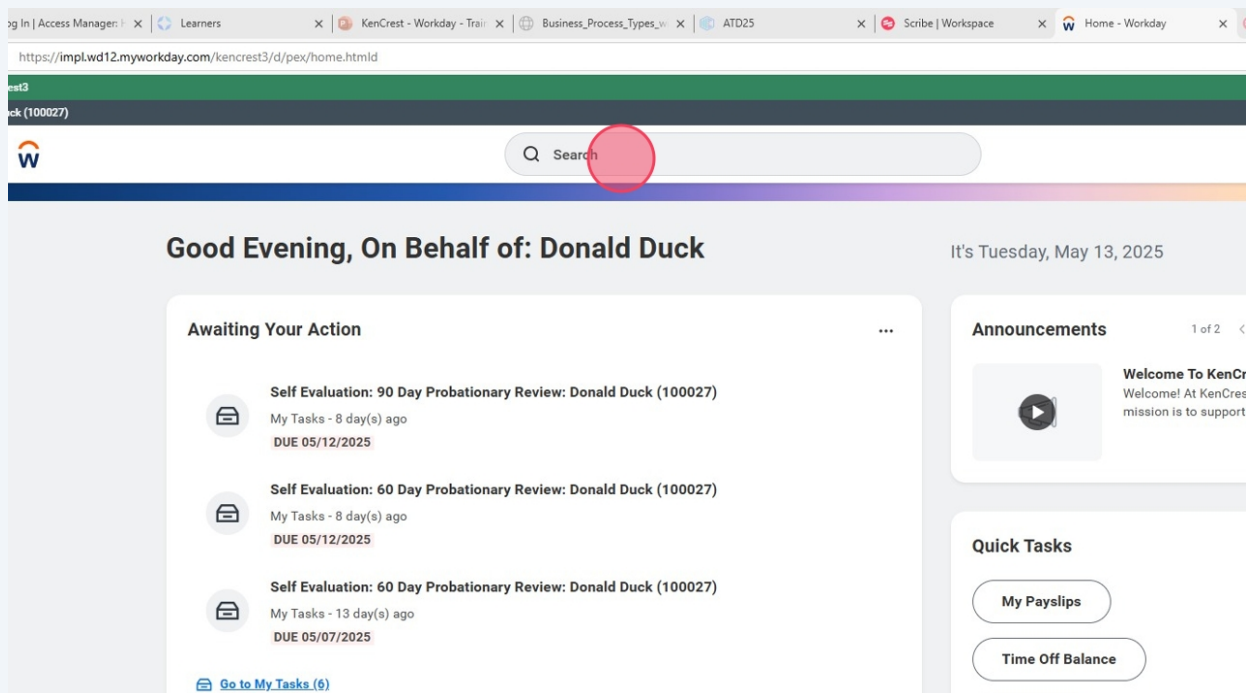


Creating Goals in Workday for Employees

This guide provides a step-by-step process for setting personal goals within Workday. By following the instructions, users can effectively create individual goals to evaluate and track your progress against objectives. The goals that you create are available for you to add to your performance reviews and development plans.

1

Use the Search box and type in **My Individual Goals** to navigate to the My Individual Goals screen.



2

Click "My Individual Goals"

The screenshot shows a web browser window with the URL <https://implwd12.myworkday.com/kencrest3/d/search.html?q=my+individual+Goals&state=searchCategory-all%3Adefault>. The page header includes the Workday logo and a search bar containing the text "my individual Goals". Below the header, there are tabs for "Top Results", "People (0)", "Tasks and Reports (2)", "Learning (0)", and "All Categories". The "Top Results" tab is selected. Under this tab, a "Workday Assistant" message states: "Here is the best match for your ask:". Below this message is a button labeled "My Individual Goals", which is circled in red. Further down, there is a section titled "Tasks and Reports" with a link to "View My Goal Alignment Report". At the bottom of the page, there is a search bar with the text "Can't find what you are looking for?" and a button labeled "View Search Tips".



Alert! All employees will have three prepopulated goals: Accountability, Innovation and Training and Skills Improvement. These are organizational goals that are expected of all KenCrest employees. The description for each of these goals can be found in the description section of the goal as noted in the screenshot below. You are not able to archive, delete to edit these goals. You cannot make edits to these goals.

3 Click the **Add** button to add a new goal.

Log In | Access Manager | Learners | KenCrest - Workday - Trail | Business_Process_Types | ATD25 | Scribe | Workspace | My Indi

https://implwd12.myworkday.com/kencrest3/d/task/93c18d5189e710001a4d58ec97c05b2b.html

Implementation - kencrest3

On behalf of: Donald Duck (100027)

MENU my individual Goals

My Individual Goals

Donald Duck (100027)

Add

3 items Sort By: ▾

Accountability In Progress Performance

Innovation Performance

Training and Skills Improvement Training

Edit Goal

Goal * Format ▾ B I U A ▾ :☰ 🔗

Accountability

Description * Format ▾ B I U A ▾ :☰ 🔗

KenCrest employees are responsible to meet or exceed the expectations of both external and internal customers. We expect an Employee are able to complete all tasks timely and accurately; promote col-
laboration and assistance to and with coworkers, such as Taking on colleagues' tasks when they are
out on PTO; or Prior to taking PTO, employee communicates clearly to their supervisor and coworkers
what support will be needed in the time of their absence.

Category * X Performance :☰

Status * In Progress ▾



Alert! The sections marked with a red * asterisk are required fields and must be completed.

- 4 Click in the "Goal" text box and add a name of the goal.

Implementation - konocest3
On behalf of: Donald Duck (100027)

MENU my individual Goals


My Individual Goals Donald Duck (100027) ...

Add

4 items Sort By: ▾

Accountability	Performance
In Progress	
Innovation	Performance
Training and Skills Improvement	Training

Create Goal

Goal * Format ▾ B I U A ▾ : : : 

Description * Format ▾ B I U A ▾ : : :

Category * : : :

Status * select one ▾

Relates To : : :

Organization Alignment : : :

Weight 0

- 5 Click "Description" text box to enter a description for the goal. Try to be specific.

My Individual Goals Donald Duck (100027) ...


Add

4 items Sort By: ▾

Accountability	Performance
In Progress	
Innovation	Performance
Training and Skills Improvement	Training

Create Goal

Goal * Normal ▾ B I U A ▾ : : : Get DSP Level 3 certified

Description * Normal ▾ B I U A ▾ : : : Achieve levels 1, 2 and 3 NADSP certification 


Category * : : :

Status * select one ▾

Relates To : : :

Organization Alignment : : :

Weight 0

Due Date * MM/DD/YYYY 

Associated Reviews (empty)

6

Click "Category" text box to select an appropriate category for your goal. You can add multiple categories if applicable. Select the goal you want to align to by clicking on the menu to expand.

The screenshot shows the 'Create Goal' form with the following fields and values:

- Goal:** Get DSP Level 3 certified
- Description:** Achieve levels 1, 2 and 3 NADSP certification
- Category:** Performance (selected from the expanded dropdown menu)
- Status:** Professional Development (selected from the expanded dropdown menu)
- Relates To:** Training (selected from the expanded dropdown menu)
- Organization Alignment:** (empty)
- Weight:** 0
- Due Date:** MM/DD/YYYY
- Associated Reviews:** (empty)

The 'Add' button is at the top left, and the 'Submit', 'Save for Later', and 'Cancel' buttons are at the bottom.

7

Click on the "Status" text box to select a status to indicate the level of completion of the goal. This can be edited and updated as you make progress toward completion.

The screenshot shows the 'Create Goal' form with the following fields and values:

- Goal:** Get DSP Level 3 certified
- Description:** Achieve levels 1, 2 and 3 NADSP certification
- Category:** Professional Development (selected from the expanded dropdown menu)
- Status:** select one (selected from the expanded dropdown menu)
- Relates To:** Not Applicable (selected from the expanded dropdown menu)
- Organization Alignment:** Not Started (selected from the expanded dropdown menu)
- Weight:** Completed (selected from the expanded dropdown menu)
- Due Date:** At Risk (selected from the expanded dropdown menu)
- Associated Reviews:** (empty)

The 'Add' button is at the top left, and the 'Submit', 'Save for Later', and 'Cancel' buttons are at the bottom.

8

Click the "Relates To" text box if you want to align the goal to a related item such as a KenCrest competency, competency category or feedback received from a peer or supervisor. Select as appropriate by clicking on the menu to expand it. This is not a required field, so you do not have to complete it.

Create Goal

Goal * Normal B I U A : | Get DSP Level 3 certified

Description * Normal B I U A : | Achieve levels 1, 2 and 3 NADSP certification

Category * x Professional Development

Status * Not Started

Relates To

Organization Alignment

Weight 0

Due Date * MM/DD/YYYY

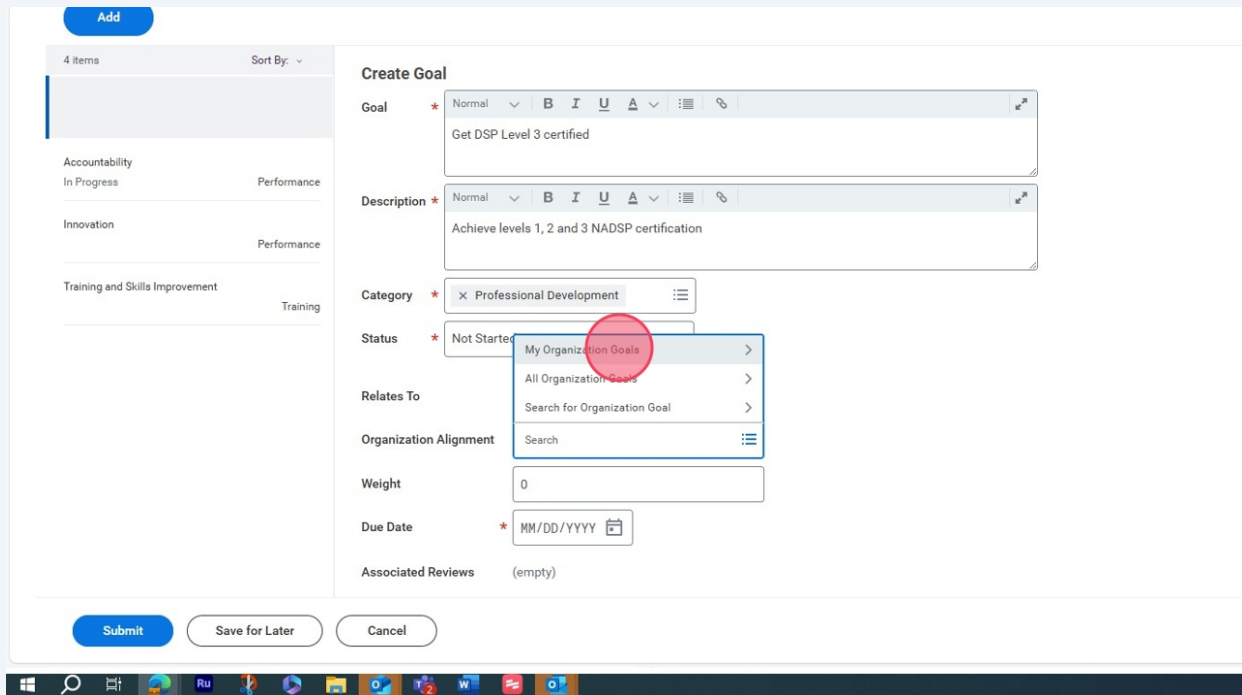
Associated Reviews (empty)

Submit **Save for Later** **Cancel**

9

If you would like to link this goal to a specific organizational goal, select a goal in the Organizational Alignment field. This allows you to connect the goal to one of the three organizational goals. This field is not required for completion.

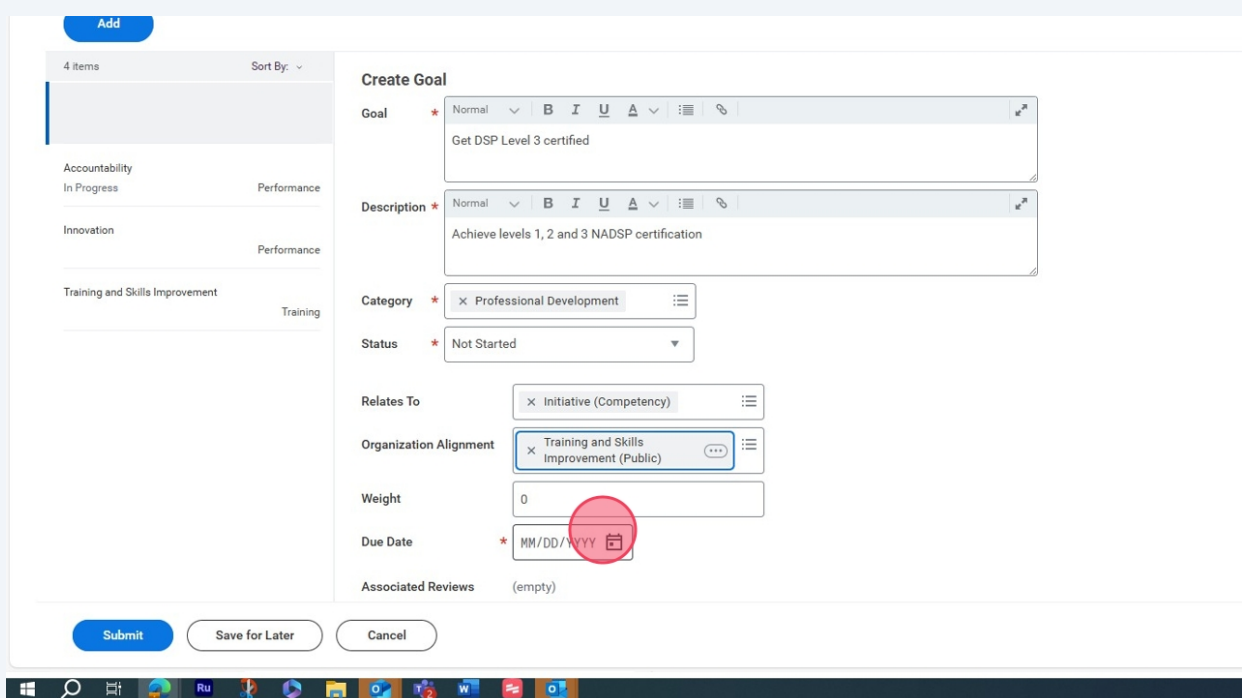
If you want to add a level of importance relative to all of your goals, you can weigh each goal in the level of importance. in the "weight" field. This is optional for completion.



The screenshot shows the 'Create Goal' form in a web application. On the left, there is a sidebar with a list of categories: Accountability (In Progress), Innovation (Performance), and Training and Skills Improvement (Training). The main form area is titled 'Create Goal' and contains several fields: 'Goal' (with a text area containing 'Get DSP Level 3 certified'), 'Description' (with a text area containing 'Achieve levels 1, 2 and 3 NADSP certification'), 'Category' (a dropdown menu showing 'Professional Development'), 'Status' (a dropdown menu showing 'Not Started'), 'Relates To' (a dropdown menu showing 'My Organization Goals'), 'Organization Alignment' (a dropdown menu showing 'Search'), 'Weight' (a text input field with '0'), 'Due Date' (a date picker showing 'MM/DD/YYYY'), and 'Associated Reviews' (a text area showing '(empty)'). The 'Relates To' dropdown menu is open, showing options: 'My Organization Goals', 'All Organization Goals', and 'Search for Organization Goal'. A red circle highlights the 'My Organization Goals' option. At the bottom of the form, there are three buttons: 'Submit', 'Save for Later', and 'Cancel'. The Windows taskbar is visible at the bottom of the screen.

10

Click the "Calendar" text box to add a due date to indicate when you will complete the goal.



The screenshot shows the 'Create Goal' form in a web application. On the left, there is a sidebar with a list of categories: Accountability (In Progress), Innovation (Performance), and Training and Skills Improvement (Training). The main form area is titled 'Create Goal' and contains several fields: 'Goal' (with a text area containing 'Get DSP Level 3 certified'), 'Description' (with a text area containing 'Achieve levels 1, 2 and 3 NADSP certification'), 'Category' (a dropdown menu showing 'Professional Development'), 'Status' (a dropdown menu showing 'Not Started'), 'Relates To' (a dropdown menu showing 'Initiative (Competency)'), 'Organization Alignment' (a dropdown menu showing 'Training and Skills Improvement (Public)'), 'Weight' (a text input field with '0'), 'Due Date' (a date picker showing 'MM/DD/YYYY'), and 'Associated Reviews' (a text area showing '(empty)'). The 'Due Date' field is highlighted with a red circle, and a calendar icon is visible next to it. At the bottom of the form, there are three buttons: 'Submit', 'Save for Later', and 'Cancel'. The Windows taskbar is visible at the bottom of the screen.

11

Select the date by clicking through the calendar until you get to the month / year you are looking for.

The screenshot shows the 'Create Goal' form. A calendar overlay for August 2025 is displayed, with the date 1st (Saturday) highlighted by a red circle. The form fields include:

- Goal:** Get DSP Level 3 certified
- Description:** Achieve levels 1, 2 and 3 NADSP certification
- Category:** (dropdown menu)
- Status:** (dropdown menu)
- Relates To:** (dropdown menu)
- Organization:** (dropdown menu)
- Weight:** (input field)
- Due Date:** MM/DD/YYYY (calendar icon)
- Associated Reviews:** (empty)

Buttons at the bottom: Submit, Save for Later, Cancel.

12

Click the "Track By" text box to identify how you want to measure progress on your goal completion. You can select percentage, amounts or units. This is an optional field for completion.

The screenshot shows the 'Track By' dropdown menu open, with the 'Percent' option highlighted by a red circle. The form fields include:

- Category:** Professional Development
- Status:** Not Started
- Relates To:** Initiative (Competency)
- Organization Alignment:** Training and Skills Improvement (Public)
- Weight:** 0
- Due Date:** 10/31/2025
- Associated Reviews:** (empty)
- Track By:** select one (dropdown menu)
- Milestones:**

	Amount	Due Date	Status
+	Percent		
	Unit		

Buttons at the bottom: Submit, Save for Later, Cancel.

- 13 The screen below shows an example if you select percentage of how you will fill it. in

Organization Assignment: × Training and Skills Improvement (Public) ...

Weight:

Due Date: * 10/31/2025 📅

Associated Reviews: (empty)

Track By:

Minimum Percent:

Target Percent:

Maximum Percent:

Actual Percent:

Milestones: 2 items

	*Milestone	Due Date	Status
+	<input type="text"/>	MM/DD/YYYY 📅	<input type="text"/>
−	Achieve level 1 certification	08/01/2025	× Not Started

- 14 Click "Submit" button to submit the goal. This will send the goal to your supervisor for approval.

Associated Reviews: (empty)

Track By:

Minimum Percent:

Target Percent:

Maximum Percent:

Actual Percent:

Milestones: 3 items

	*Milestone	Due Date	Status
+	<input type="text"/>	MM/DD/YYYY 📅	<input type="text"/>
−	Achieve level certification	10/31/2025 📅	× Not Started
−	Achieve Level 2 certification	09/05/2025	× Not Started
−	Achieve level 1 certification	08/01/2025	× Not Started



Alert! You will see the goal listed on your "My Individual Goals" showing it as pending approval until it is approved by your supervisor. You cannot make edits to the goal until it is approved.