

# Creating Goals in Workday for Employees



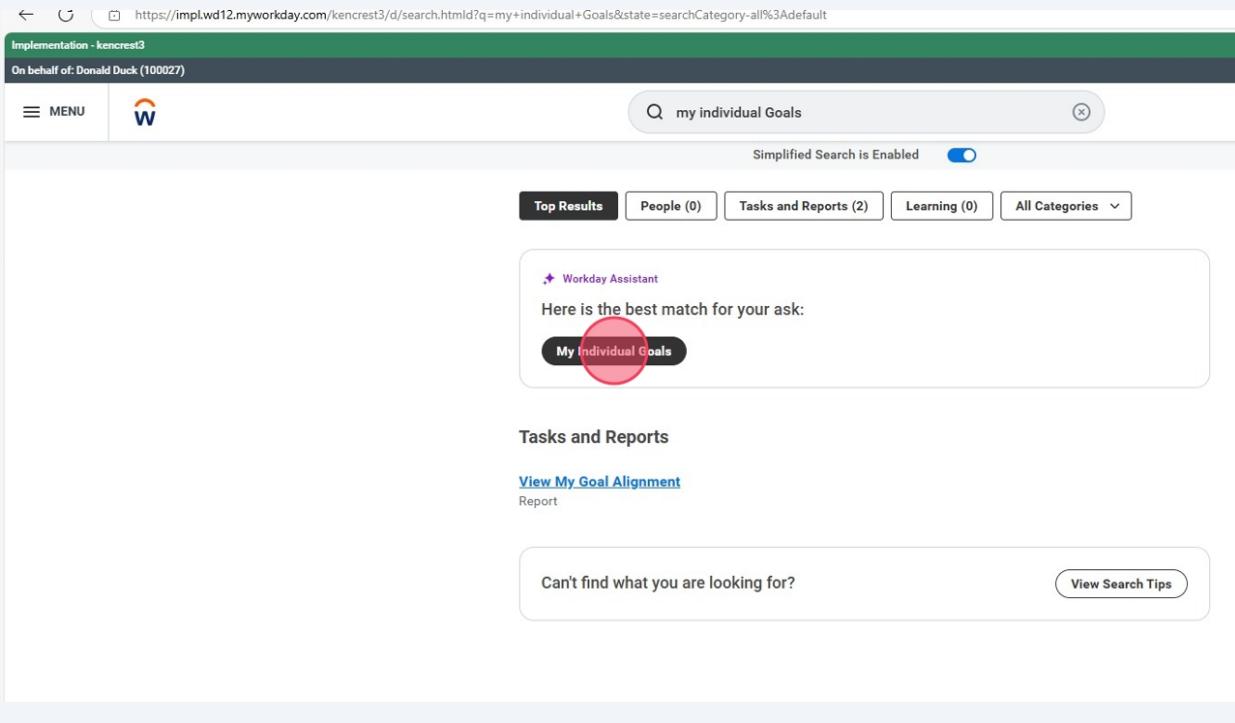
This guide provides a step-by-step process for setting personal goals within Workday. By following the instructions, users can effectively create individual goals to evaluate and track your progress against objectives. The goals that you create are available for you to add to your performance reviews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

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

The screenshot shows the Workday homepage for user 'Donald Duck'. At the top, a search bar is highlighted with a red circle. The main content area includes a greeting 'Good Evening, On Behalf of: Donald Duck' and a date 'It's Tuesday, May 13, 2025'. On the left, a 'Awaiting Your Action' section lists three tasks, each with a file icon, a title, a 'My Tasks' link, and a due date. On the right, an 'Announcements' section shows a single item with a play icon and a 'Welcome To KenCrest' message. Below these are 'Quick Tasks' sections for 'My Payslips' and 'Time Off Balance'.

Task	Description	Due Date
Self Evaluation: 90 Day Probationary Review: Donald Duck (100027)	My Tasks - 8 day(s) ago	DUE 05/12/2025
Self Evaluation: 60 Day Probationary Review: Donald Duck (100027)	My Tasks - 8 day(s) ago	DUE 05/12/2025
Self Evaluation: 60 Day Probationary Review: Donald Duck (100027)	My Tasks - 13 day(s) ago	DUE 05/07/2025

## 2 Click "My Individual Goals"

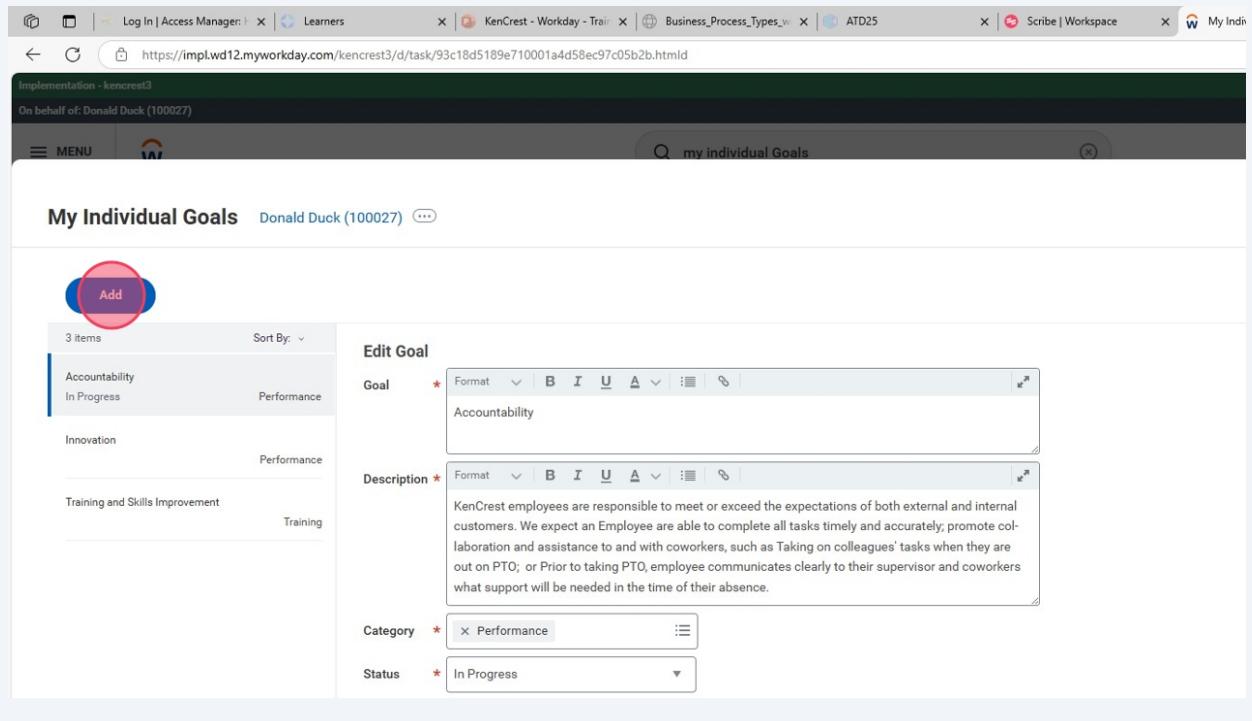


The screenshot shows the Workday search interface. The search bar at the top contains the text "my individual Goals". Below the search bar, there is a toggle switch labeled "Simplified Search is Enabled". A red circle highlights the "Top Results" button, which is currently selected. Below the search bar, there are several categories: "People (0)", "Tasks and Reports (2)", "Learning (0)", and "All Categories". A callout from the "Workday Assistant" suggests the best match for the search query is "My Individual Goals", which is also highlighted with a red circle. The "Tasks and Reports" section is visible, showing a report titled "View My Goal Alignment". At the bottom, there is a link "Can't find what you are looking for?" and a "View Search Tips" button.



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.



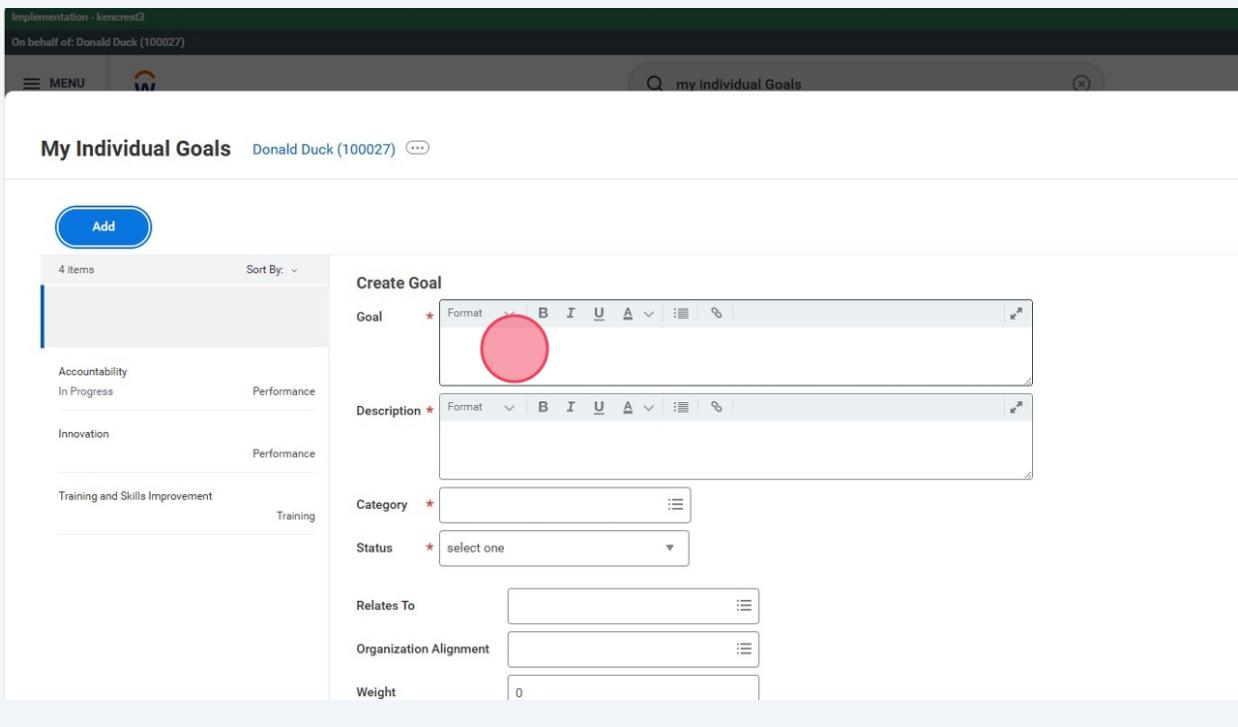
The screenshot shows the 'My Individual Goals' page for Donald Duck (100027). On the left, there is a sidebar with categories: Accountability (In Progress), Innovation (Performance), and Training and Skills Improvement (Training). The main area is titled 'Edit Goal' and contains the following fields:

- Goal:** Accountability
- Description:** 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 collaboration 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:** 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.

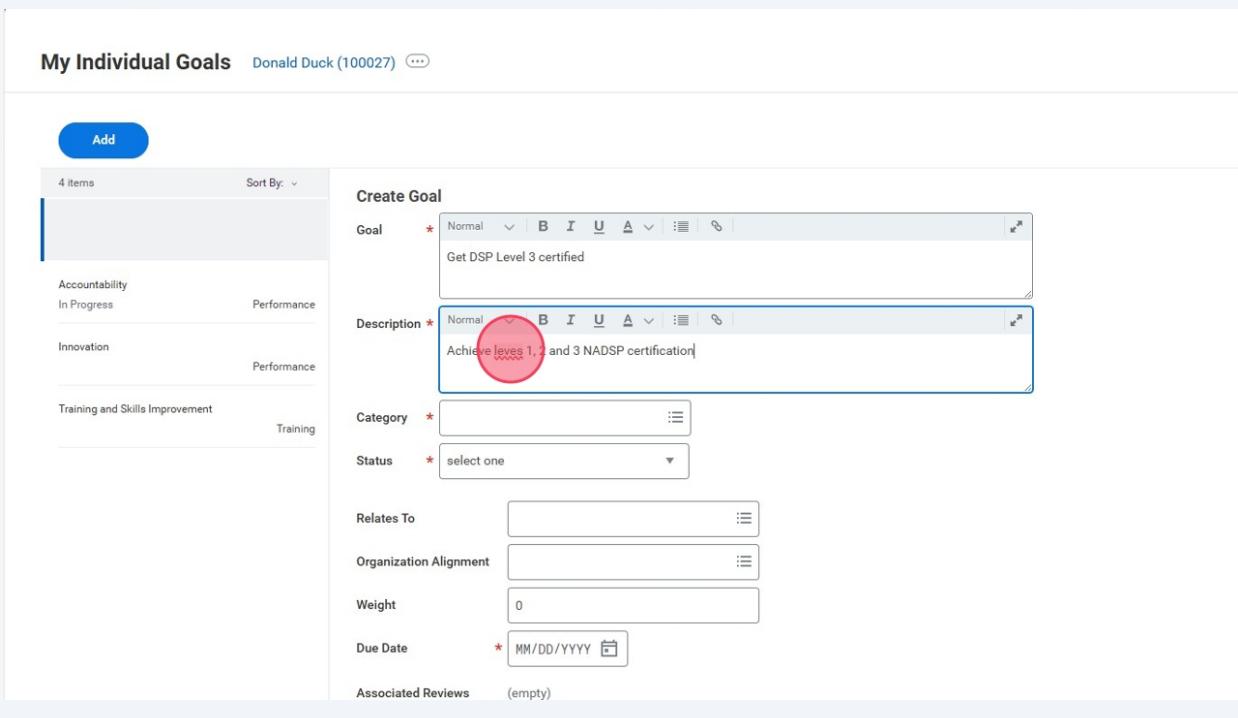


The screenshot shows a web-based application for managing goals. At the top, there is a header with the text 'Implementation - kencrest3' and 'On behalf of: Donald Duck (100027)'. Below the header is a navigation bar with a 'MENU' icon, a search bar containing 'my individual Goals', and a 'Logout' button. The main content area is titled 'My Individual Goals' and shows a list of 4 items. The items are categorized as follows:

Category	Status	Performance
Accountability	In Progress	
Innovation		Performance
Training and Skills Improvement		Training

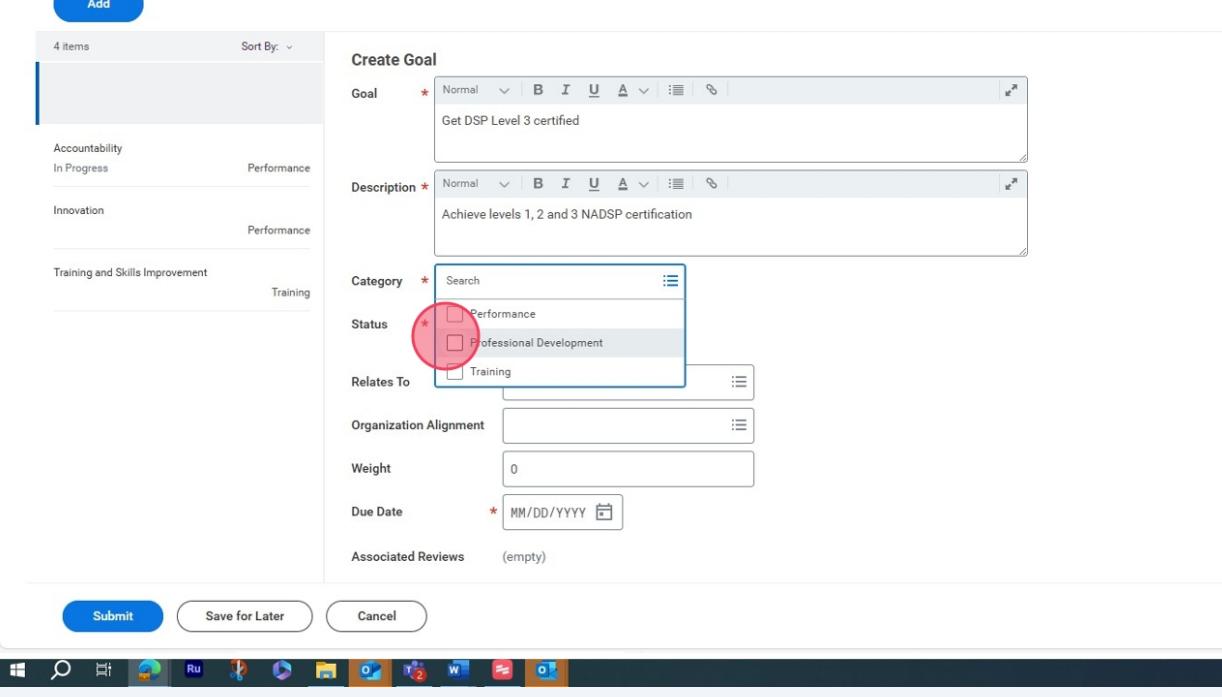
On the right side of the screen, there is a 'Create Goal' form. The 'Goal' field is highlighted with a red circle, and the text 'Get DSP Level 3 certified' is entered. The 'Description' field is also highlighted with a red circle, and the text 'Achieve levels 1, 2, and 3 NADSP certification' is entered. The other fields in the form are empty or have dropdown menus.

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



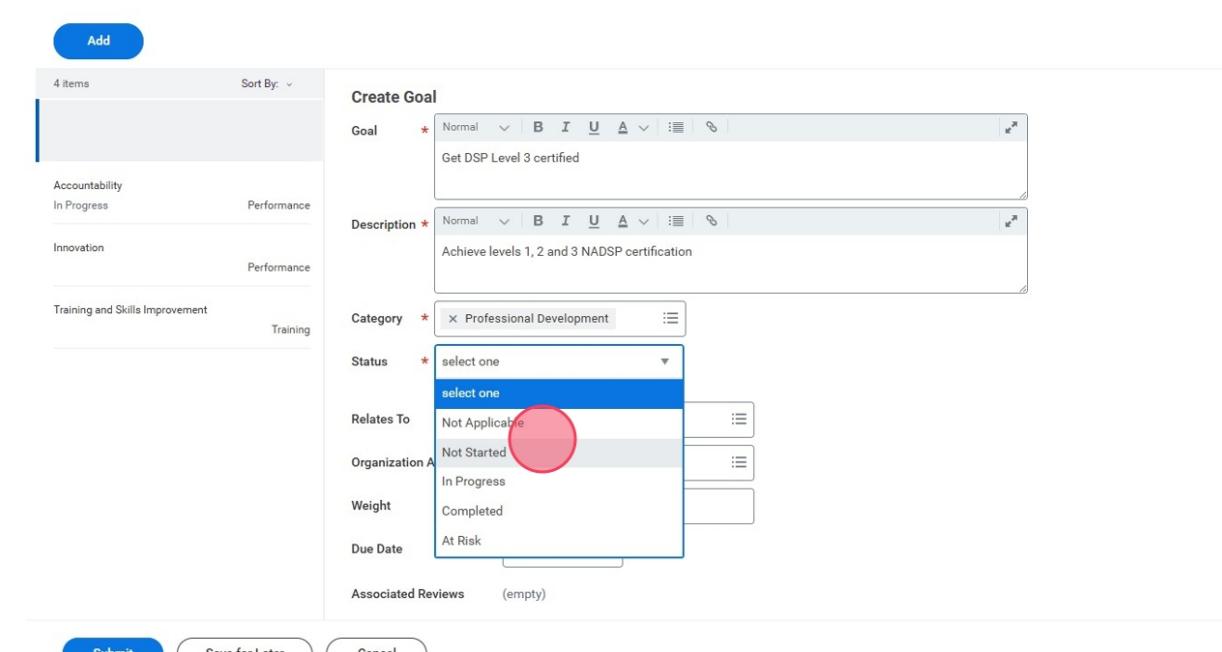
The screenshot shows the same 'Create Goal' form as the previous one, but with a more detailed description entered in the 'Description' field. The 'Description' field is highlighted with a red circle, and the text 'Achieve levels 1, 2, and 3 NADSP certification' is entered. The 'Goal' field contains 'Get DSP Level 3 certified'. The other fields in the form are empty or have dropdown menus.

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' interface. On the left, there is a sidebar with a list of categories: Accountability (In Progress, Performance), Innovation (Performance), and Training and Skills Improvement (Training). The 'Training' item is selected. The main area contains fields for 'Goal' (Get DSP Level 3 certified), 'Description' (Achieve levels 1, 2 and 3 NADSP certification), and 'Category'. The 'Category' field is a dropdown menu with the following options: Search, Performance, Professional Development, and Training. The 'Professional Development' option is highlighted with a red circle. Other fields include 'Status' (Status dropdown), 'Relates To' (dropdown menu with 'Not Applicable', 'Not Started', 'In Progress', 'Completed', and 'At Risk'), 'Organization Alignment' (dropdown menu), 'Weight' (0), 'Due Date' (MM/DD/YYYY), and 'Associated Reviews' (empty). At the bottom are 'Submit', 'Save for Later', and 'Cancel' buttons.

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' interface. The sidebar and main form fields are identical to the previous screenshot. The 'Status' field is a dropdown menu with the following options: 'select one', 'Not Applicable', 'Not Started', 'In Progress', 'Completed', and 'At Risk'. The 'Not Started' option is highlighted with a red circle.

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.

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.

Add

4 items Sort By:

Accountability	In Progress	Performance
Innovation		Performance
Training and Skills Improvement		Training

**Create Goal**

Goal

Get DSP Level 3 certified

Description

Achieve levels 1, 2 and 3 NADSP certification

Category

Status

Relates To

Organization Alignment

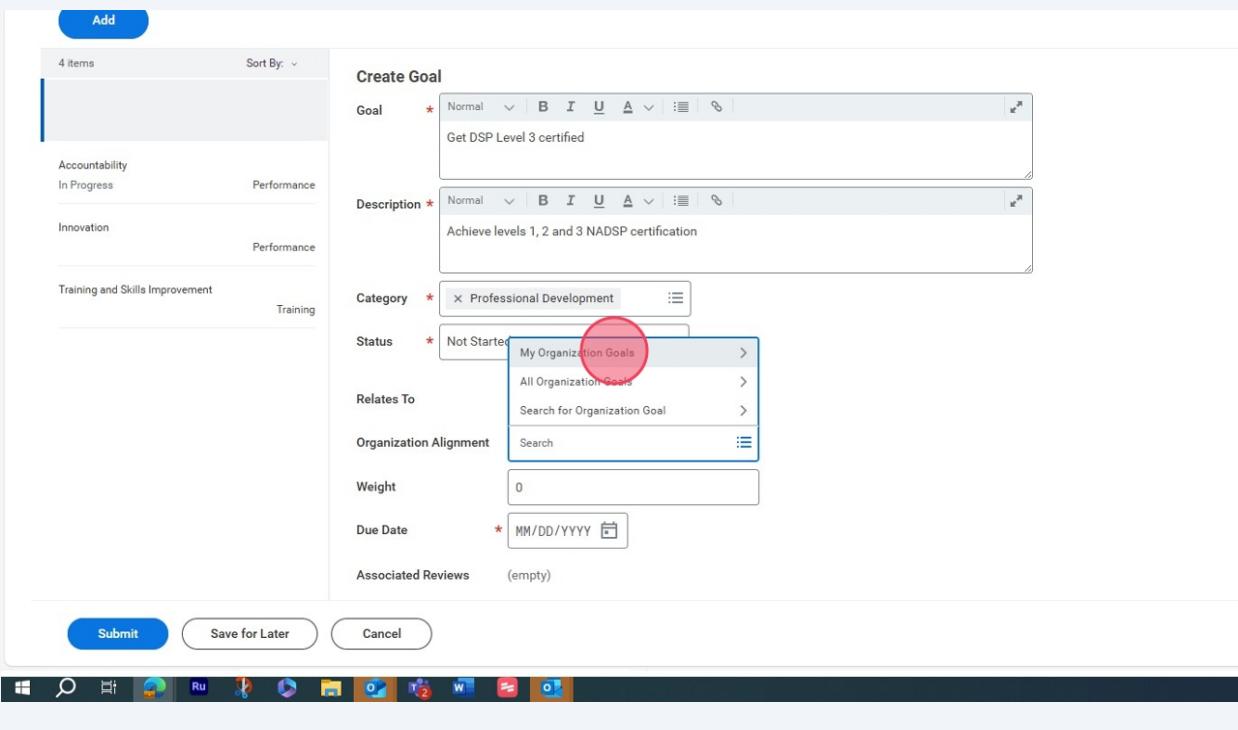
Weight

Due Date

Associated Reviews

(empty)

Submit Save for Later Cancel



10

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

Add

4 items Sort By:

Accountability	In Progress	Performance
Innovation		Performance
Training and Skills Improvement		Training

**Create Goal**

Goal

Get DSP Level 3 certified

Description

Achieve levels 1, 2 and 3 NADSP certification

Category

Status

Relates To

Organization Alignment

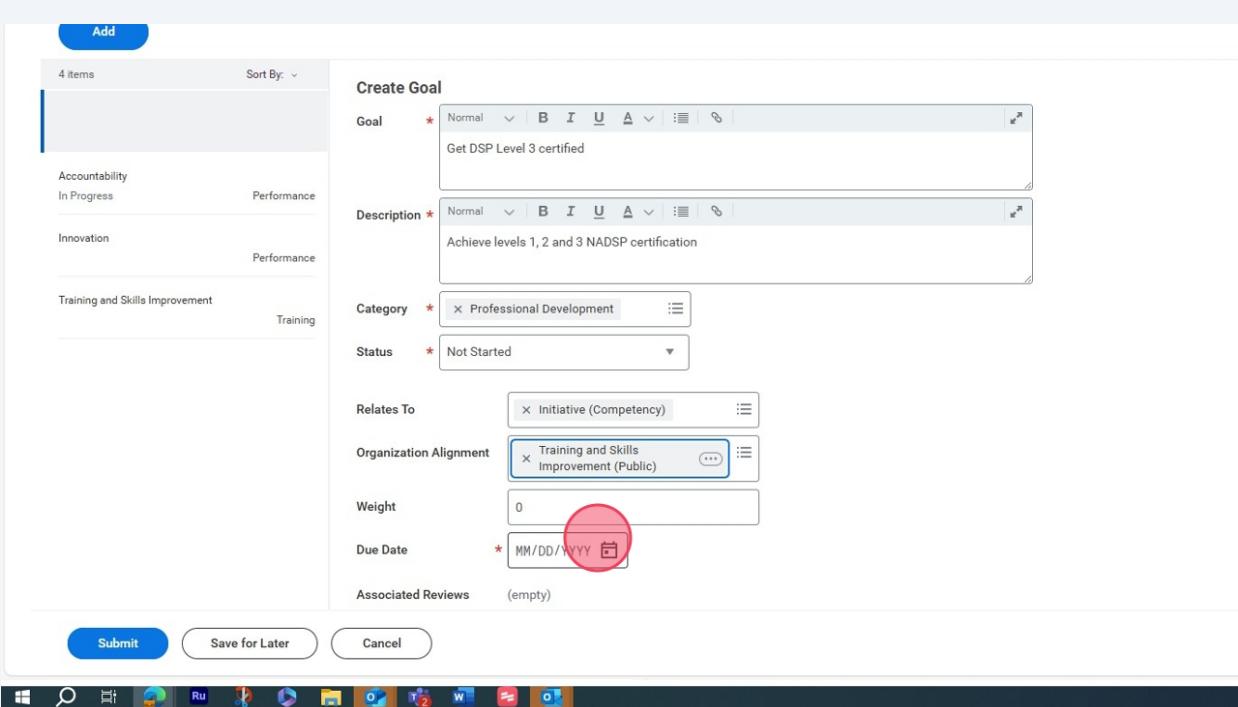
Weight

Due Date

Associated Reviews

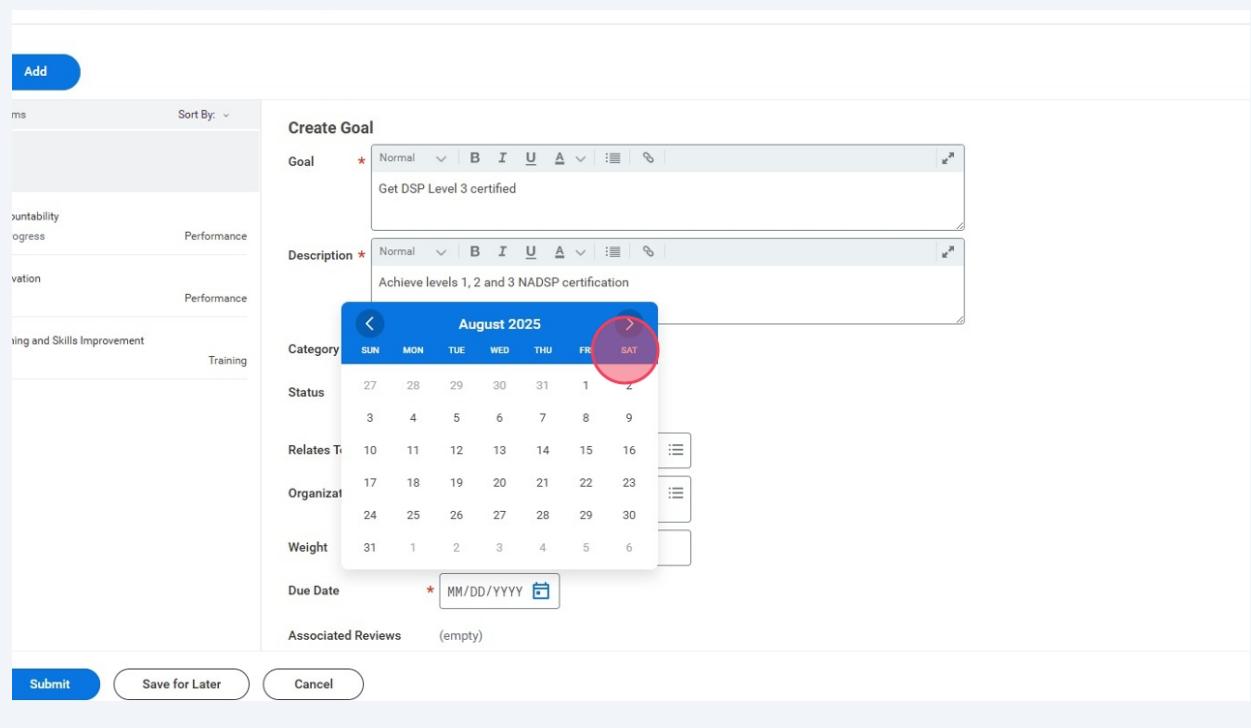
(empty)

Submit Save for Later Cancel



11

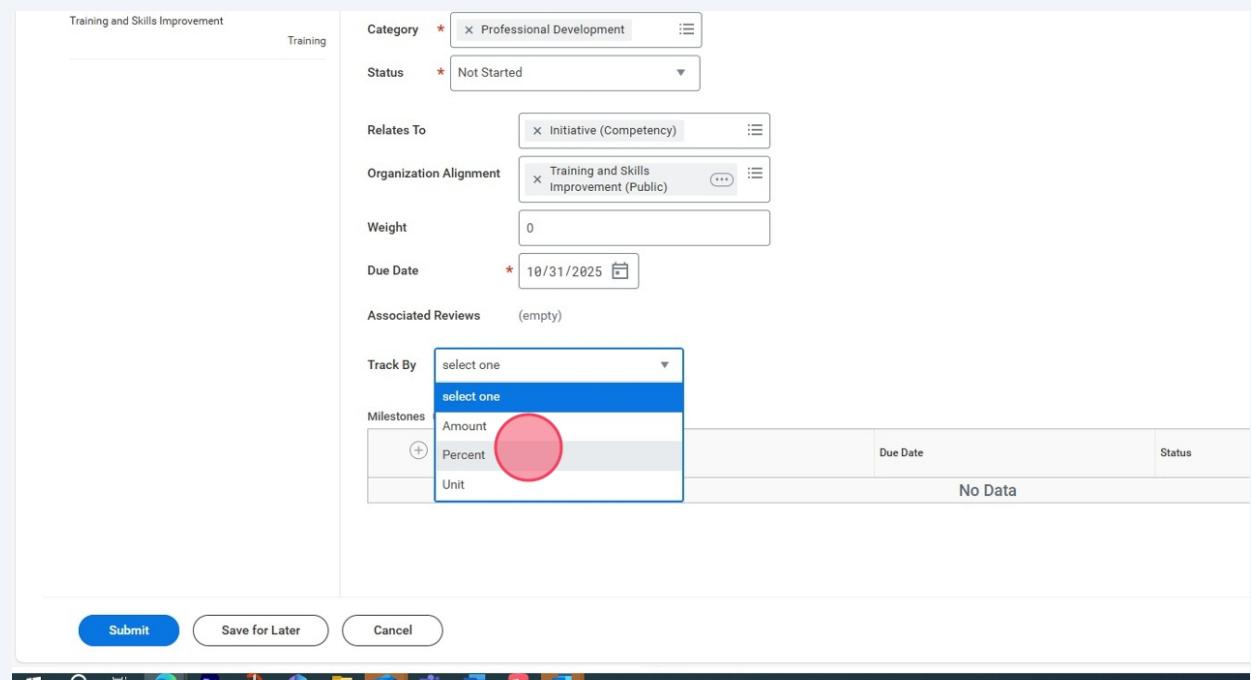
Select the date by clicking through the calendar until you get to the month / year you are looking for.



The screenshot shows the 'Create Goal' form. On the left, there are tabs for 'Training' and 'Performance'. The 'Training' tab is selected. The main area contains fields for 'Goal' (Get DSP Level 3 certified), 'Description' (Achieve levels 1, 2 and 3 NADSP certification), and a 'Category' section. A date picker is open, showing the month of August 2025. The date '1' (August 1st) is highlighted with a red circle. Below the date picker are fields for 'Status', 'Relates To', 'Organization Alignment', 'Weight', and 'Due Date' (MM/DD/YYYY). At the bottom are buttons for 'Submit', 'Save for Later', and 'Cancel'.

12

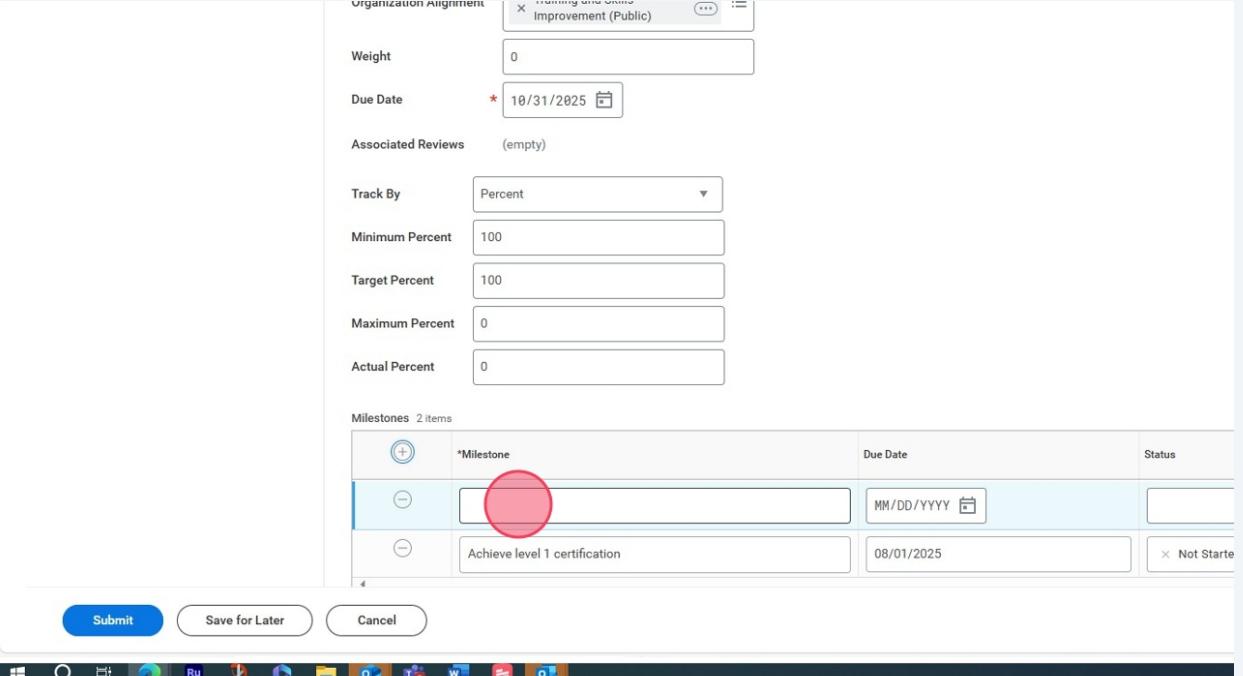
Click the "Track By" text box to identify how you want to measure progress on your goal completion. You can select percentage, amounts or units. This is an optional field for completion.



The screenshot shows the 'Create Goal' form with the 'Training' tab selected. The 'Category' field is set to 'Professional Development'. The 'Status' field is 'Not Started'. The 'Relates To' field is 'Initiative (Competency)'. The 'Organization Alignment' field is 'Training and Skills Improvement (Public)'. The 'Weight' field is '0'. The 'Due Date' is '10/31/2025'. The 'Associated Reviews' field is '(empty)'. The 'Track By' dropdown is open, showing options: 'select one', 'select one', 'Amount', 'Percent' (which is highlighted with a red circle), and 'Unit'. At the bottom are buttons for 'Submit', 'Save for Later', and 'Cancel'. The taskbar at the bottom of the screen is visible.

13

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



Organization Alignment: Improvement (Public)

Weight: 0

Due Date: \* 10/31/2025

Associated Reviews: (empty)

Track By: Percent

Minimum Percent: 100

Target Percent: 100

Maximum Percent: 0

Actual Percent: 0

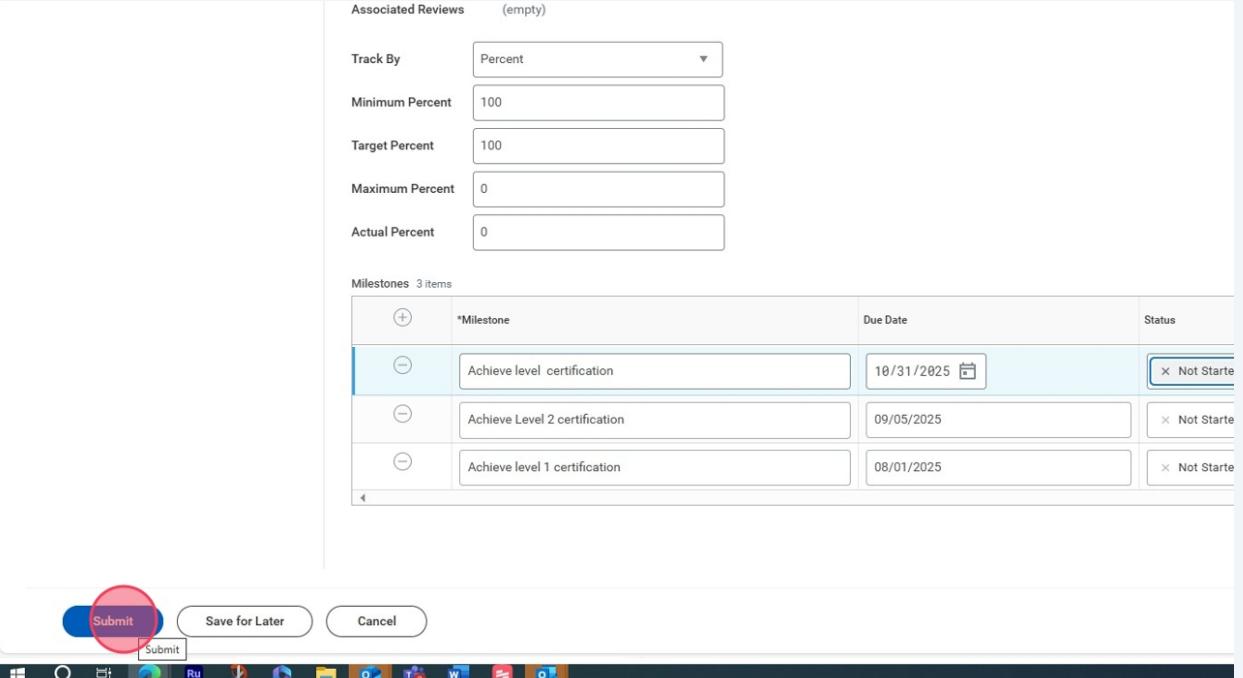
Milestones: 2 items

*Milestone	Due Date	Status
Achieve level 1 certification	08/01/2025	Not Started

Submit Save for Later Cancel

14

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



Associated Reviews: (empty)

Track By: Percent

Minimum Percent: 100

Target Percent: 100

Maximum Percent: 0

Actual Percent: 0

Milestones: 3 items

*Milestone	Due Date	Status
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

Submit Save for Later Cancel



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.