

# Performance: Manage Team Goals for Managers

## Manager

### Managing Team Goals

As a manager, you can add, edit, monitor, and track the goals your direct reports have created.

#### View Team Goals

1. Type **Team performance** in the search bar to assess the **Team Performance report**
2. Select **More** under the Track My Teams Goals.
3. **My Team's Goals** will pop up
4. Select your Supervisory Organization if it does not auto populate.
5. From the View By prompt, choose **Worker**.
6. Select **OK**.
7. From here, you can monitor all your direct reports' goals, status, due dates, and add goals.

#### Add Team Goals

1. Type Team performance in the search bar to assess the Team Performance report
2. Select More under the Track My Teams Goals.
3. My Team's Goals will pop up
4. Select your Supervisory Organization if it does not auto populate.
5. From the View By prompt, choose Worker.
6. Select OK.
7. Select the **Add Goal to Employees** button
8. Select **Create a New Goal** or **Copy Existing Goal**.

# Performance: Manage Team Goals for Managers

## Manager

**Add Goal to Employees** [X]

☒ Create New Goal  
☐ Copy Existing Goal [Dropdown]

**Assign To**


Employees [Text Field] [Dropdown]  
Talent Pool [Text Field] [Dropdown]  
Organizations [Text Field] [Dropdown]

[Cancel] [OK]

9. Select which Employees you want to assign this goal to from the Employees prompt.
10. Select an organization from the Organization prompt. Select **My Organization**, then click the checkbox
11. Select **OK**.
12. Enter the following details: Please note all fields with a \* are required for completion.
  - a. Goal: Enter the goal for the employee.
  - b. Description: Enter more specific details for the goal, such as actions or criteria necessary to complete the overall goal.
  - c. Category: Select from your organization's specific categories for goals.
  - d. Organization Alignment: This optional field allows you to align to an organizational goal that your goal supports.
  - e. Weight: This optional field allows you to
  - f. Due Date: Enter the date that the employee should complete the goal by.
  - g. Editable Checkbox: Select if you want employees to be able to make updates to the goal.
  - h. Tracks By: Select from the following options (optional):
    - i. Amount: Currency default to your country
    - ii. Percent: Consider using to track percent complete
    - iii. Unit: Calls, Cases, Clients, Hours, Projects, Transactions, or insert other categories the customer has configured



# Performance: Manage Team Goals for Managers

## Manager

**Add Goal to Employees** 



Assign To 1

**Goal** \*

Normal ▼ | B | I | U | A ▼ | : = |  ▼ |  ▼

Complete 5 projects by end of the year.

**Description**

Normal ▼ | B | I | U | A ▼ | : = |  ▼ |  ▼

Projects must include 3 or more people.

**Category**

× Operational

: ≡


**Organization Alignment**

: ≡

**Weight**

0

**Due Date**

12/31/2024 

**Editable**

☒

**Track By**

select one ▼

Remove

Submit

Save for Later

Cancel

13. Select **Submit**.



**Note:** Your direct reports will receive a notification in their Workday My Tasks advising them that goals were added or edited.