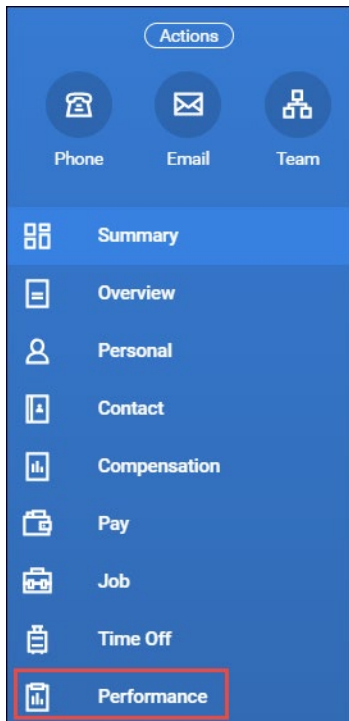


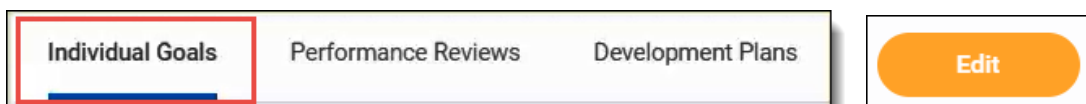
Add and Archive Goals

This job aid will provide step-by-step instructions on how to add, update or archive individual goals.

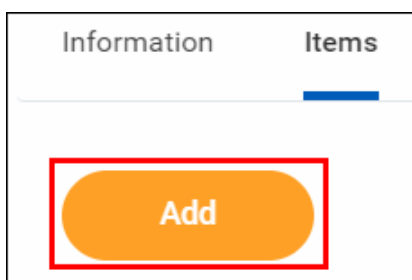
Step 1: Navigate to your Profile page and click on **Performance**.



Step 2: Verify you are on the *Individual Goal* tab and Click **Edit** at the bottom of the screen.



Step 3: Click **Add** to start creating goals.



Step 4: Follow the steps below to add a goal and goal details.

1. Type your goal into the *Goal* field.
Type a description of your goal using the *Description* field.
2. In the *Category* field, click the **List** icon to select a category for your goal.
3. Click the **Down Arrow** in the *Status* field to select a progress status.
4. Click the **Calendar** icon to select a due date for the goal.
5. In the *Relates To* field, click the **List** icon to select a competency related to the goal.
6. From the *Milestones* section, click the **Plus** icon to add a milestone, due date, and status. To delete milestones, click the **Minus** icon.

The screenshot shows a goal creation form with the following fields and actions:

- Goal:** "Improve presentation skills" (Callout 1)
- Description:** "Develop and deliver a presentation to team" (Callout 1)
- Category:** "Developmental Goals" (Callout 2)
- Status:** "In Progress" (Callout 3)
- Relates To:** "Communication (Competency)" (Callout 4)
- Due Date:** "11 / 30 / 2018" (Callout 5)
- Milestones:** A table with 1 item:

	*Milestone	Due Date	Status
(Callout 6)	complete online course- How to give great presentations	10/23/2018	Not Started

Step 5: Click **Submit** to continue.

The screenshot shows three buttons: "Submit" (highlighted with a red box), "Save for Later", and "Cancel".

Step 6: Click **Done** on the *Process Successfully Completed* screen. The *Performance* screen now displays.

The screenshot shows a success message: "Process Successfully Completed" with a green checkmark icon. Below the message is a link for "Details and Process". At the bottom, the "Done" button is highlighted with a red box. In the top right corner, there are links for "Do Another" and "Archive Goals".

The following steps will demonstrate how to Update Goals.

Step 1: Click **Edit** to update a goal.

Step 2: Select the goal you would like to update from the *In Progress Goals*. Modify each relevant field. Refer to the sub steps from Step 4 of this job aid. Click **Submit** to save changes.

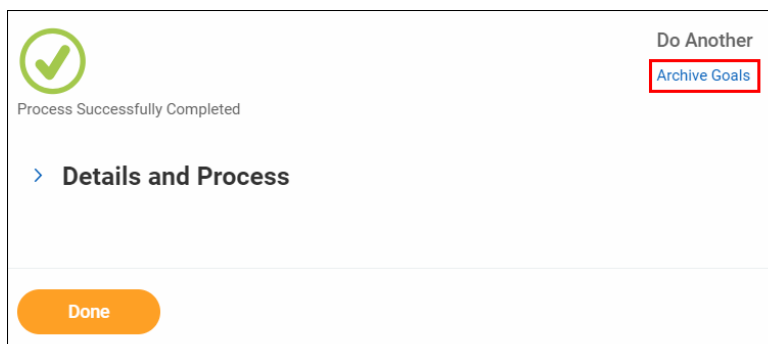
The following steps will demonstrate how to Archive Goals.

Step 1: Navigate to your *Profile* page and click on **Performance**.

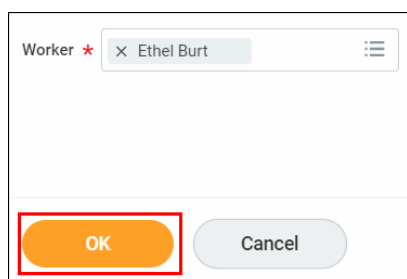
Step 2: On the *Individual Goals* screen, click the goal you want to archive. Review the goal details under the *Edit Goal* section. Make any updates to the goal as shown in step 4.

Step 3: Click **Submit** after updating the goal.

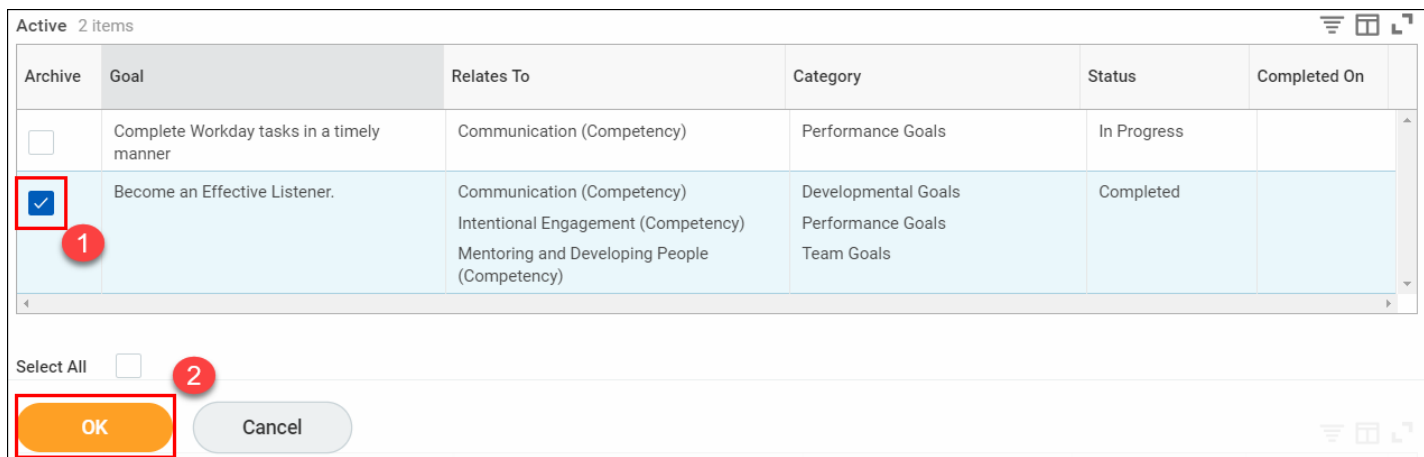
Step 4: Click the **Archive Goals** link once you reach the *Process Successfully Completed* screen.



Step 5: From the *Archive Goals* screen, your name will be populated in the Worker field. Click OK to continue.



Step 6: Click the **check box** corresponding to the goal you want to archive (1). Click **OK** to continue (2).



Click **Done** on the *Process Successfully Completed* screen. Completed goals will be archived in your Workday Inbox.