

## CASCADING GOALS FOR MANAGERS

THIS GUIDE IS FOR: MANAGERS

### OVERVIEW: GOAL TYPES

Goal Type	Description
<b>Organization Goals</b>	Goals assigned to supervisory organizations.
<b>Individual or Employee Goals</b>	Goals assigned to individual employees.
<b>Cascaded Goals</b>	Same goal assigned to two or more employees.

### REVIEWING, ADDING AND EDITING YOUR DIRECT REPORTS' GOALS

Employees will track their goals within Workday@OK. Employees will receive notifications to complete their goals and, as a manager, you will be able to monitor and track the goals your employees have created.

1. From the Workday@OK homepage, select **View All Apps** → **Team Performance**.
2. Here, there are multiple reports and tasks you can view related to your team's goals.
3. To view the **My Team's Goals** report, select the **Goals** button on the right side of the page. There is also a dashboard report/widget to **Track My Team's Goals** upon opening the **Team Performance** application. To view your team's goals in more detail, select the **View More** link at the bottom of the report/widget.
4. Your **Supervisory Organization** and **Worker** will default as values in the **Supervisory Organization** and **View By** fields. Select **OK**.
5. On the next screen, you can view all your employees' goals regarding status, due dates, etc.
6. Select the **Edit** button if you need to edit one of your employee's goals.
7. Select the **Add Goal to Employees** if you want to add a new goal for an employee.
  - a. You can **Create a New Goal** or **Copy Existing Goal**.
  - b. Select which **Employee(s)** you want to assign this goal or input the **Organization**. Select **OK**.
  - c. Enter the following details:
    - i. **Goal (required field)**: Enter the goal for the employee.
    - ii. **Weight**: Weigh your goal in relation to other goals (i.e., if you have four equally weighted goals for this employee, weigh the goal at 25%).
    - iii. **Due Date**: Enter the date by which this goal is to be completed.
    - iv. **Track By**: Select from amount, percent or unit.
8. Select **Submit**.

### MANAGING ORGANIZATION GOALS

As a manager, you have the ability to track **Organization Goals** within Workday@OK.

1. Type **Manage Organization Goals** in the search bar and select the **Task** option.
2. Select the **Organization** that you would like to create a goal for and the desired **Goal Period**. Select **OK**.
3. Select **Add** to include an organization goal for the desired goal period.
  - a. Enter the following details:
    - i. **Goal (required field)**: Enter the goal for the supervisory organization.
    - ii. **Percent Complete**: Track the completion status of the goal.



- iii. **Supports:** Link this organization goal to goals that are one or more levels up in the organization hierarchy.
  - iv. **Supporting Initiatives:** Select initiatives that aren't already associated with an organization goal.
  - v. **Private:** Only members of the organization chain can see the goal. Goals that have **Supporting Initiatives** cannot be private.
4. Select **OK**.