

CASCADING GOALS FOR MANAGERS

THIS GUIDE IS FOR: MANAGERS

OVERVIEW: GOAL TYPES

Goal Type	Description
Organization Goals	Goals assigned to supervisory organizations.
Individual or Employee Goals	Goals assigned to individual employees.
Cascaded Goals	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**.