

Hello and thank you for joining us for this training on How to Create Goals in Workday. There's a couple different ways to approach and reach our goals in Workday and that is what I would like to be able to share and show people. When... after logging into Workday, you land on this sort of What's Happening page and, um, I am in a test environment, so all this information you see here is... is just fake information we use for testing things, uh, and making demonstrations for training. So, uh, nevertheless, it will be a great format in which we can show functionality. So, when we land in a Workday, it looks like this, and there's a couple different things we can do to get to where we want to go. You can click on the picture of your face over here or just the icon of a person's head and you can go to view profile then you can look at all the different tabs of what you can accomplish and do within Workday. And if you go to Performance and Goals then you can see, you can get to your goals that way. Another way to get there is via searching My Goals. So, if you typed in the word My Goals up here, you would get a search and you can click on My Goals and it'll take you directly to your goals. Couple different things on this page I'd like to highlight, as you can see I have a couple here in progress. Some that are completed. Prior year goals are in there. There's Individual Goals. There's Archive Goals. And there's also Organizational Goals. So, organizational goals, you'll see, are connected to the Strategic Plan. If you were to link, uh, or click into these goals, you'd find more details about the Strategic Plan. Archive goals are ones that are from prior years that are completed. As you can see that I haven't archived any, uh, because I'm a bit of a new employee. And the individual goals, so individual goals in Workday are performance goals. There's another type of goals... called Professional Development Goals, uh, and they're more for like my career development. Where do I want to go? Where do I want to grow? Um, or, what do I need to do to stay current and certified for my position? Individual goals are more along the performance, uh, aspects of, uh, of goal management, and it's really what are the goals that my boss and I have for my position, what are the goals that my boss has for me to accomplish this quarter, this semester, this academic year, this fiscal year, whatever it is. To add a goal, you would go right to the orange button that says Create a Goal. It's very super simple. You could... could title the goal whatever you wanted or just type in a whole goal right here, goal one, and then, we could use, uh, the description key here to use SMART Goal... Goals. So, we do encourage people to have a specific, measurable, achievable, relevant, and timely goals for SMART Goals. There's a lot of resources out there in LinkedIn Learning via Workday Learning that you can access for free and there's also some MC specific, uh, goals training in regards to how to create SMART goals. So, you would have a title, a description, you could have the status here, so, obviously, this doesn't have an asterisk, so it's not required. But in regards to tracking progress, maybe you have one that you're going to start, you're planning ahead, you're going to start it in a few months, you can say Not Started. Umm, if you're In Progress, you would select In Progress, and when we're done, we select Complete. And then, it gives us a date of when it was completed on, but since this is just the beginning, I think we will go with In Progress. If you would like, you can choose to connect these goals to different categories, um, that is very optional. And it's best served if you have a whole bunch of different goals and you're trying to organize all of them, uh, so I wouldn't worry too much about a category.

Organizational alignment is something that I do think is worth really digging into. What I wanted to highlight is, you know, connecting. As you can, click right through here, all the options to look at. How is my job related to the broader strategic goals of this organization? And selecting the one that connects to the specific goal that you've identified I think, it really helps create that throughput of what the broader organization is working on and how it connects to how, what I do on a regular basis. Then, you would connect, uh, select, uh, an end date, let's say it's before we go on winter break, gotta love it. And it's truly that simple. Let me move this bar out of the way. It's truly that simple. At this point, you could save for later. If you wanted to, review it. You would submit it. If you just want to send it to your boss, your boss would then have the option to, um, review it, approve it, edit it, send it back, make many different options. So, if we were to set commit... select submit, it goes, as you can see, my boss, her name is Lauren Landau, and then we go to her to review for approval. Now, another step of this example is, so my boss has submitted, I've submitted some goals to her, and, uh, this is an older goal, but we're going to use it as an example, and she said, hey, I think you should, you know, revise a little bit, so we would go, we would open up, right, and we can see down here that she's added some, uh, some detail of what she would like the goal to look like. So, she said, hey, I would like to, uh, let's just say, it's goal one, for... for training purposes, add in some description down there. Pardon. Let me get the description correct. And, uh, then what I can do is I've made this update. I can change the due date because it looks like perhaps that one's a little old, right? This is a yearly project that we work on, so let me select a new due date if that would be relevant and important. And then, I can submit. There we go. So, my revised goal has been submitted, uh, and now that one goes to Lauren also for her review. Um... Um, so, there are two different ways to create individual goals. You click, uh, the create goal button, and to get to this page, either you go through your profile or you type in my goals and do a search at the top bar. If you were to go to your Profile, which I recommend everyone get familiar with, and we go to Performance. Just as a reminder, you can get goals. There's reviews goals, professional development goals is what I wanted to point out. So, professional development goals are different than individual goals. These are more along the lines of what are some skills, what are some things that I would like to get better at. Uh, what situates me to grow in my career or what situates me to remain competitive in an ever-changing, um, marketplace. Um, technology changes, certifications need to be updated, whatever. These broader, uh, individual personal goals are for one's professional development. Uh, we may have a few of them. We may just have one. It all depends on the individual, but we do recommend taking the time to add them so that you can keep track and your boss can... can also. Let's say, there are some projects coming down the pike and they know that you have a professional goal, perhaps, they can align you with work that will help you grow in the direction that you would like to grow. So, you, uh, just type in your professional goal. I'm just going to do goal two as a test... test goal two. Whatever it is, you type it in there, and then you go for Status. You probably recognize these In Progress, Completed, Not Applicable, or Not Started. And to approve this one, there's a little check mark over here, that's how this one works. You click, check, check mark, and Shazam. These are professional development goals and do not require your direct

supervisor's approval, but they are here. It's a tool and a resource for your, um, for your use and convenience. So, I... I hope you're able to take advantage of that. That... this is a quick rundown on how to complete and submit, uh, and create goals in Workday. If there's any further questions that we can help you with... with, uh, please reach out to the HR Help Desk or your On-campus Human Resources Internal Consultant. Thank you for your time and have a great day.