Adding Goals for a Direct Report or Team

This guide will cover:

- Adding a goal for one direct report in particular or a specific member of the team and how to add one specific goal to multiple reports as part of a team.

This guide details the steps for completing this process using Supervisor/Manager WyoCloud access.

Step One

Navigate to the Goals section of WyoCloud HCM from WyoWeb.

- Upon signing in, the homepage will display. Click on the Navigator button (three horizontal lines) in the upper left-hand corner.

- Select Goals under the My Team header within the Navigator.
The My Team Goals page will display.

Step Two

Add a goal for one direct report.

**Note:** Because the review period defaults to the most future-oriented year, you may have to toggle between review periods to get to your desired review period. You can toggle between different review periods by using the Period drop down.

From the My Team Goals page, select the employee for which a goal will be added. Click on their name to add a goal.
After clicking on their name, a page with all the employee’s current goals will appear. To add a goal, use the **Add Goal** drop down.

You can choose between a **New Goal** and a **Library Goal**. For the purpose of this guide, New Goal will be used.
Step Three

Add details of the goal.

- The *Add Goal* page will display.

- In the *Goal Details* section, the Start Date will auto-populate based on the review period. This date can be changed if desired.
- **Category** and/or **Level** are optional fields. They can be updated by clicking on the drop down next to each field.
- **Completion Percentage, Status, and Priority** can be updated by click on the drop downs next to each field.
Step Four

Add Measurement, Target Outcome, or Task details.

- To add Measurements, Target Outcomes, or Tasks, click on the corresponding tab on the left-hand side of the page.

- Click **Measurements** on the left-hand side of the page. The **Measurements** page will display.
- Click on the + icon to add a measurement.

- The **Add Measurement** page will display.
  - **Name** is a required field.
  - **Unit of Measure, Start Date, End Date, and Comments** are optional fields.
- When done, click **Save and Close**.
To add target outcomes, click on the **Target Outcomes** tab on the left-hand side of the page. The **Target Outcomes** page will display.

- Click on the + icon to add a target outcome.

Select the type of target outcome you wish to add by clicking on the corresponding name. For the purpose of this guide, Competencies will be used.

In the **Search and Select: Competencies** page, you may search for a specific competency by searching the name in the textbox.
- Highlight the competency you want to add and click **OK**.

![Search and Select: Competencies](image)

- To add tasks, click on the **Tasks** tab on the left-hand side of the page. The **Tasks** page will display.
- Click on the + icon to add a task.

![Tasks tab](image)

- A box will appear where you can enter the details of the task.
- Name and Type are a required fields. Select a type by clicking on the drop down.
- **Status**, **Start Date**, **Related Link**, **Priority**, **Completion Percentage**, **Target Completion Date**, and **Comments** are optional fields.
When you are done entering the details of the new goal, scroll to the top and **click Save and Close**.

Click **OK** in the Confirmation window.

You have completed the steps to Adding Goals for a Direct Report.