Managing Goals

This guide details the steps for managing Direct Reports goals as a Supervisor/Manager.

This guide will cover:

1. **Approving** Direct Report goals
2. **Editing** Goals for Direct Reports
3. **Adjusting** Weight of a Direct Reports Goals
4. **Copying** a Direct Reports Goal
5. **Moving** a Direct Reports Goals
6. **Extending** a Direct Reports goal
7. **Aligning** a goal for a direct report
8. **Sharing** goals with a Direct Report
9. **Canceling** a Direct Reports Goals
10. **Deleting** a Direct Reports goals

**Note: Review Periods**
Review periods enable you to organize your processes around goal management and performance evaluations into time-bound business cycles. Review period is a common component that ties to goal plans and performance document periods. For example, you create review periods to associate with goal plans and performance documents that fall within the same time frame. University of Wyoming uses Annual Review periods. Each Employee has a corresponding Goal Plan.

**Note: Goal Plans**
Goal plans are used to manage a collection of performance goals for a specific Review Period. You must associate each goal with a goal plan. You can associate a worker goal only with one goal plan at a time. Each goal plan is associated with a review period. Goal plans pull into Performance Evaluations for the corresponding Review Period.
1. **Approving Direct Report goals**

   **Note:** Before a goal created by a direct report can be added to a goal plan it must be approved by the supervisor.

**Step One**

Navigate to the Awards section of WyoCloud HCM from WyoWeb.

- First, check for notifications by clicking on the Bell icon near the top, left-hand side of the homepage.

  **Note:** In the future, notifications will appear in the drop down. For now, click **More Details**.

- The **BPM Worklist** will display.
- Click the hyperlink associated with the approval of the goal submitted by the direct report.
To approve, select the Approve bubble.
To reject, select the Reject bubble.
When the decision has been made, click Submit in the upper, right-hand corner of the page.

You have completed the steps to Approving Goals Made by Direct Reports.

2. Editing Goals for Direct Reports

Note: After a goal is established you may go back and edit goal measurements, target outcomes and tasks.

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.

Step Two
Navigate to the My Team Goals page.

- After selecting Goals under the My Team header, you will see three tabs with unique icons on the left-hand side of the page.
  - The first tab containing a single person corresponds to My Goals.
  - The second tab containing multiple people corresponds to My Team Goals.
  - The third tab containing a person with a bullseye corresponds to My Organization Goals.
- Select the second tab.
- The My Team Goals page will display.
**Step Three**
Manage and edit the direct reports’ goal.

- Click on the **name of the employee** who has a goal that is to be managed/edited.

  ![Employee List Screenshot]

- A page containing all of the assigned goals for that employee will appear.
- Click on the **name of the goal** that is to be managed/edited.

  ![Goal Details Screenshot]

- You may edit anything on the **Goal Details** page (i.e. the Start Date, Description, Success Criteria, etc.). Edits may include Measurements, Target Outcomes, and Tasks.
- After you edit/manage the goal you will click **Save and Close** in the upper, right-hand corner of the page.

  ![Edit Goal: Success Screenshot]
Click OK in the Confirmation window.

You have completed the steps to Editing Goals for Direct Reports.

3. Adjusting Weight of a Direct Reports Goals

**Note:** Over the course of a review period goals might be added. Since all goals should have a combined weight of 100% you will need to adjust weights when newer goals are added.

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Step Two
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- After selecting Goals under the My Team header, you will see three tabs with unique icons on the left-hand side of the page.
  - The first tab containing a single person corresponds to My Goals.
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- Select the first tab.
- The My Goals page will display.
Step Three
Adjust the weight of the goal.

- Click on the goal that is to be adjusted.

- In the **Goal Details** section, click on the blue pencil next to Weight.

- The **Edit Goal Weights** page will appear.
- You can adjust the weights accordingly by changing the numbers in the **Weight (%)** fields.
- Click **OK** when finished.
Click Yes in the Warning window if the percentage shown is correct.

Click OK in the Confirmation window.

You have completed the steps to Adjusting the Weight of Goals.

4. Copying a Direct Reports Goal

Note: Copy a goal and change the goal plan and attributes of the new copied goal as appropriate. The copied goal is added to the worker’s goals list.

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- 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.
Step Two
Navigate to the *My Team Goals* page.

- After selecting Goals under the My Team header, you will see three tabs with unique icons on the left-hand side of the page.
  - The first tab containing a single person corresponds to **My Goals**.
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  - The third tab containing a person with a bullseye corresponds to **My Organization Goals**.

- Select the first tab.
- The *My Goals* page will display.

![Image of My Goals page](image1)

Step Three
Copy the goal.

- Click the **orange triangle** button to the right of the goal that is to be copied.

**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.

![Image of My Goals page](image2)
Click **Copy** in the drop down.

- The *Copy Goal* page will display.
- Details about the goal being copied can be changed from the original goal.
- When finished changing details of the copy, click **Save and Close** in the upper, right-hand side of the page.

Click **OK** in the Confirmation window.

You have completed the steps to Copying a Direct Reports goal.
5. Moving a Direct Reports Goals

**Note:** Move a goal to another goal plan. The moved goal is no longer associated with the source goal plan. These steps will allow you to move a goal to a different goal plan.

**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.

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![Navigator](image.png)
Step Two

Navigate to the *My Team Goals* page.

- After selecting Goals under the My Team header, you will see three tabs with unique icons on the left-hand side of the page.
  - The first tab containing a single person corresponds to *My Goals*.
  - The second tab containing multiple people corresponds to *My Team Goals*.
  - The third tab containing a person with a bullseye corresponds to *My Organization Goals*.
- Select the **second tab**.
- The *My Team Goals* page will display.

![My Team Goals page](image1)

Step Three

Move the direct reports’ goal.

- Click on the **name of the employee** who has a goal that is to be moved.

![My Team Goals page](image2)
- A page containing all of the assigned goals for that employee will appear.
- Click on the orange triangle button to the right of the goal that is to be moved.

- A drop down menu will appear. Click **Move**.

- After clicking Move, the **Move Goal** pop-up will display.
- All required fields are noted with a blue asterisk.
- After completing all required/addition fields, click **Save and Close**.
- Click **OK** in the next Confirmation window.

You have completed the steps to Moving Goals for Direct Reports.
6. Extending a Direct Report’s goal

**Note:** Extend a goal to another goal plan to let the worker continue working on the goal for a period later than the current goal plan. The target goal plan must have an end date later than the end date of the current goal plan. After extending, the goal is associated with both the source and target goal plans. Any subsequent changes to the goal in the source goal plan are also carried onto the target goal plan after you extend the goal.

**Step One**

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- Select **Goals** under the My Team header within the Navigator.
Step Two
Navigate to the *My Team Goals* page.

- After selecting Goals under the My Team header, you will see three tabs with unique icons on the left-hand side of the page.
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  - The third tab containing a person with a bullseye corresponds to *My Organization Goals*.
- Select the **second tab**.
- The *My Team Goals* page will display.

Step Three
Extend the direct reports’ goal.

- Click on the **name of the employee** who has a goal that is to be extended.
A page containing all of the assigned goals for that employee will appear.
Click on the orange triangle button to the right of the goal that is to be extended.

A drop down menu will appear. Click Extend.

After clicking Extend, the Extend Goal pop-up will display.
All required fields are noted with a blue asterisk (Target Goal Plan & Start Date).
After completing all required/additional fields, click Save and Close.
Click OK in the next Confirmation window.

You have completed the steps for Extending a Direct Reports Goal.
7. Aligning a goal for a direct report.

**Note:** You align performance goals to create a relationship between a worker's goal and a higher-level goal, such as an organization or manager goal. This relationship enables the worker's goal to support and contribute to achieve the higher-level goal. You can align one of your goals to only one other goal; both goals must be associated with the same review period.

**Step One**

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- Select **Goals** under the **My Team** header within the Navigator.
Step Two
Navigate to the *My Team Goals* page.

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- Select the second tab.
- The *My Team Goals* page will display.

Step Three
Align the direct report’s goal.

- Click on the name of the employee who has a goal that is to be aligned.
A page containing all of the assigned goals for that employee will appear.
Click on the orange triangle button to the right of the goal that is to be aligned.

A drop down menu will appear. Click Align.

After clicking Align, the Align Goal page will display.
Using the Source drop down, select how the goal will be aligned.
Once the goal that is to be aligned is found, click Align.

Click OK in the Confirmation window.

You have completed the steps to Aligning Goals for Direct Reports.
8. Sharing goals with a Direct Report

**Note:** Managers and workers can share performance goals so that others can add a copy of the shared goal to their goals list or align their own goals to the shared goal.

Managers can share their goals with either their direct reports, all reports, or selected persons. Tasks that are associated with goals can also be shared. An email notification is sent to the people with whom the goal is shared.

**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 **Career and Performance** under the My Profile header within the Navigator.
This will bring you to the Career and Performance Landing Page select Goals.

Step Two
Navigate to the My Team Goals page.
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- Select the first tab.
- The My Goals page will display.
Step Three
Share the goal with a direct report.

- Click the orange triangle button to the right of the goal that is to be shared.

- A drop down menu will appear. Click Share.

- The Share Goal page will display.
- Using the Add drop down, select Direct Reports.
Click on the X next to any/all Direct Reports that you do not want to share the goal with.
When only the desired Direct Reports remain, click the Save and Close button in the upper right-hand corner.

**Note:** Direct Reports can be searched in by clicking Search Person on the Share Goal page.

The Search and Select: Person page will appear.
After filling out all required fields (Worker Name, Job, Department, and E-Mail), select the desired Direct Report from the search results toward the bottom of the page.
Click Add.
After all Direct Reports that are to receive the goal appear, click **Save and Close** in the upper, right-hand side of the page.

- Click **OK** in the Confirmation window.

You have completed the steps for Sharing Goals with Direct Reports.

### 9. Canceling a Direct Reports Goals

**Note:** This step allows you to cancel a goal for a direct report. But does not remove it from the Goal Plan.

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- Select the second tab.
- The My Team Goals page will display.
Step Three

Cancel the direct reports’ goal.

- Click on the name of the employee who has a goal that is to be canceled.

- A page containing all of the assigned goals for that employee will appear.
- Click on the orange triangle button to the right of the goal that is to be canceled.

- A drop down menu will appear. Click Cancel.
Note: Cancelling goals leaves them visible on the Goal Plan, but they cannot be edited/managed/aligned/assigned, etc.

- Click **Yes** in the Warning window.

![Warning](image)

- Click **OK** in the Confirmation window.

![Confirmation](image)

You have competed the steps to Cancelling Goals for Direct Reports.

10. Deleting a Direct Reports goals

**Note:** This step will allow you to delete a Direct Reports goal and remove it from the Goal Plan.

**Step One**

Navigate to the Goals section of WyoCloud HCM from WyoWeb.

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![Navigator](image)
Select Goals under the My Team header within the Navigator.

Step Two
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- Select the second tab.
- The My Team Goals page will display.
Step Three
Delete the direct reports’ goal.

- Click on the name of the employee who has a goal that is to be deleted.
- A page containing all of the assigned goals for that employee will appear.
- Click on the orange triangle button to the right of the goal that is to be deleted.
- A drop down menu will appear. Click Delete.
- Click Yes in the Warning window.

![Warning Window]

```
Warning
The goal to succeed will be deleted. Do you want to continue? (HRG-3120288)
```

- Click OK in the Confirmation window.

![Confirmation Window]

```
Confirmation
The selected goal was deleted.
```

You have completed the steps to Deleting Goals for Direct Reports.