

2024 - Adding Goals – How To



The screenshot shows a performance management dashboard. The navigation menu at the top includes 'Performance', 'Dashboard', 'Journals', 'Goals', 'Feedback', 'Reviews', 'Succession', 'Reports & Analytics', 'Configuration', and 'Help'. The 'Goals' tab is highlighted with a red box. A blue overlay box contains the following instructions:

1. Select *Performance*
2. Select *Goals*

The dashboard content includes a 'Dashboard' header, tabs for 'My Performance' and 'Talent Summary', a search bar with 'Last, First' and a 'Search' button, and active filters for 'Employee Status: Active' and 'Supervised Employees: Direct Reports'. A 'Show Compensation' toggle is present, and a 'Compensation' section indicates that compensation is currently not being shown. A 'Team Activity, Last 90 Days' section displays four metrics: Journal Entries (0), Feedback Received (0), Impressions Awarded (0), and Goals Added (0), all at 0% of team. A footer note states 'Last data update took place at 06/18/21 12:32 PM'. At the bottom, there are four buttons: 'Create Journal', 'Create Goal', 'Request Feedback', and 'Assign Review'.

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3. Select *Create Goal*

The screenshot shows a web application interface for managing goals. At the top, there is a navigation bar with the following items: Performance, Dashboard, Journals, Goals, Feedback, Reviews, Succession, Reports & Analytics, Configuration, and Help. Below the navigation bar, the main content area is titled "Goals". In the top right corner of this area, there is an orange button labeled "Create Goal", which is circled in red. Below the "Create Goal" button, there are five cards representing different goal categories: "My Goals", "My Team", "My Org", "Team Goals" (with a count of 0), and "Company Goals" (with a building icon). Below these cards, there is a search bar with a magnifying glass icon and a "Filter" button. At the bottom of the search bar, there are active filters: "Employee Status: Active", "Goal Status: Active", and "Goal Start Date After: 06/18/2020", along with a "Clear All" button.

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[38050]

performance Performance Tasks Management

Journals **Goals** Feedback

My Team 8

Create Goal

Cancel Save

Select Type (required)

Select...

Select...

Individual

Team

Goal Title (required)

Goal Description

Select Format (required)

SMART/MBO

OKR

SMART/MBO

Goal Description

4. Select *Individual*

5. Select *Smart/MBO*

MBO – Management by Objectives

OKR- Organization Key Result

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SMART/MBO

Goal Title (required)
12 New Family Programs

Goal Description
Plan and prepare 12 new family programs - one each month to include.....

Goal Dates

Goal Period
No Goal Period
2019 Goals (01/01/2019 - 12/31/2019)
2020 GOALS (11/01/2019 - 10/31/2020)

Due Date (required)

Goal Category
No Goal Category

Set Goal Measurement (required)
Select...

6. Complete Goal Title and Goal Description

7. Goal Period = 2021 Smart Goals

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Create Goal Cancel Save

2020 GOALS (11/01/2019 - 10/31/2020) x

Start Date (required)
11/01/2019

Due Date (required)
07/30/2020

Goal Category
No Goal Category
2019 SMART GOALS
2020 SMART GOALS
SMART GOALS 2018

Set Goal Measurement (required)
Percentage

Keywords
Select...

8. Goal Category: 2021 SMART Goals

9. Goal Measurement: You can select from complete/incomplete, percentage, or number

10. Keywords – Not required to complete. If you would like to, you can enter any necessary key words like “shelf rate” or “programming”, etc.

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background Screens WebPay - Paylocity... Meeting Rooms Employer Best Pract... ESAC PEO Accredit... TargetSolutions

Create Goal

Set Goal Measurement (required)
Complete/Incomplete

Keywords
Select...

Company Alignment
Align your goal to a company goal

- Select...
- Increase Circulations and Checkouts
- Increase Computer and Digital Use
- Increase Library Visits
- Increase Program Attendance

background Screens WebPay - Paylocity... Meeting Rooms Employer Best Pract... ESAC PEO Accredit... TargetSolutions

Create Goal

Set Goal Measurement (required)
Complete/Incomplete

Keywords
Select...

Company Alignment
Align your goal to a company goal

- Select...
- Increase Circulations and Checkouts
- Increase Computer and Digital Use
- Increase Library Visits
- Increase Program Attendance

Cancel Save

11. Company Alignment: We can now align each of our goals with either a PCCLD Key Result or a PCCLD 2021 Annual Plan Objective!

12. Select "SAVE."

2024 – Editing or Deleting Your Own Goals

Employees

Dashboard

My Performance Talent Summary

My Journals

Create Journal

My Journal

1

Other Journals

4

Last Journal Activity was 3 years ago

My Goals

Create Goal

Active

7

Complete

6

Last Goal Activity was 4 months ago

My Feedback

Active

0

Complete

0

No recent activity

My Reviews

Active

1

Complete

22


Last Review Activity was 6 days ago

2024 – Editing or Deleting Goals

My Goals Create Goal

Search

Goal Status

Company Goals 




All Goals 13

Active Goals 7

Complete Goals 6

Goal Title/Objective ^	Created By	Last Update	Progress	Status	Due Date	Actions
		02/24/2020	0%	Active	10/31/2020	...
			0%	Active	10/31/2020	...
			0%	Active	10/31/2020	...
			0%	Active	10/31/2020	...
			0%	Active	10/31/2020	...
			0%	Active	10/31/2020	...
			0%	Active	10/31/2020	...
			0%	Active	10/31/2020	...
			0%	Active	10/31/2020	...

Make sure you are on Active Goals. Select the 3 dots under Actions.

-  Update
-  Copy
-  Delete

Pop Up – You can Update (Edit), Copy the goal, or Delete

2024 – Editing or Deleting Goals

The screenshot displays a goal management interface. At the top left, there is a back arrow and the text "Goal". On the right side, there is an "Actions" dropdown menu. The main content area is divided into sections: "Details", "Progress", and "Comments". The "Details" section includes fields for "Title", "Goal Category" (2020 SMART GOALS), "Format: SMART/MBO", "Type: Individual", "Created By", "Employee", and "Alignment". The "Progress" section shows a progress bar. The "Comments" section is currently empty. On the right side, there is a sidebar with an "Actions" dropdown menu that is open, showing options: "Update", "Copy", and "Delete".

Select Actions again, then you will get the same drop down menu

To Edit -Select Update
To Delete – Select Delete

NOTE: They system will not allow you to delete a goal if it has already filtered to one of your reviews. If you still want to delete, please contact Terri Daly in Human Resources.