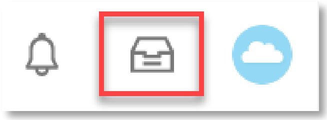
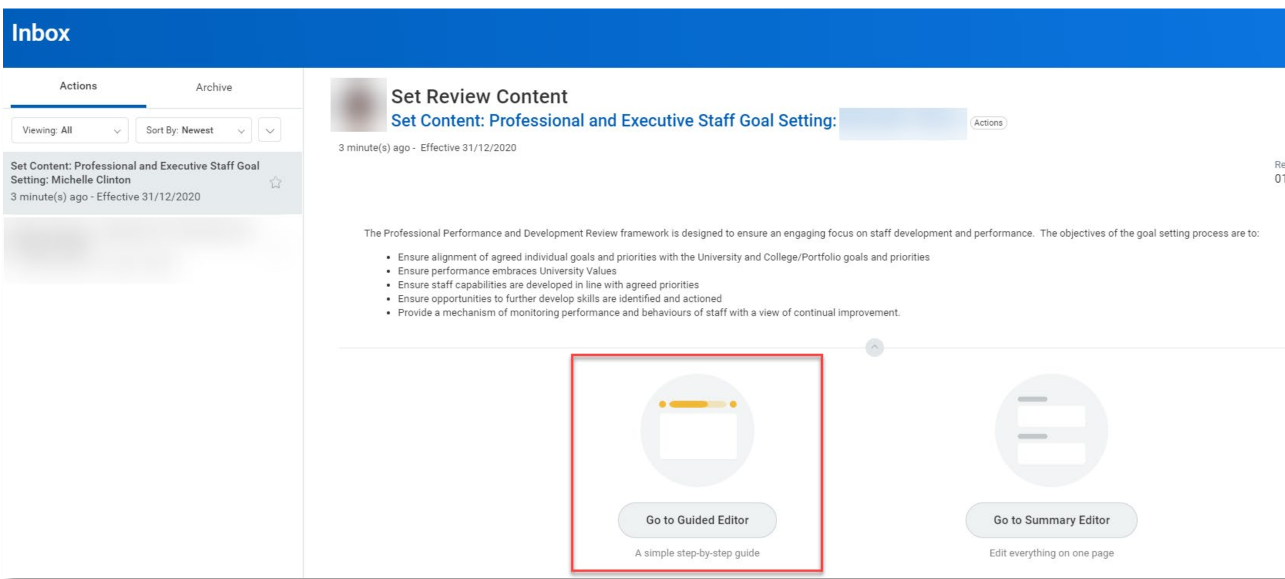
Professional and executive goal setting

All fixed term and continuing staff members will be required to set some performance goals in Workday. Tasks will be triggered into your Workday inbox each year at the time the goals are to be entered. To complete the tasks follow the steps below, ensuring they are individual to you and your role.

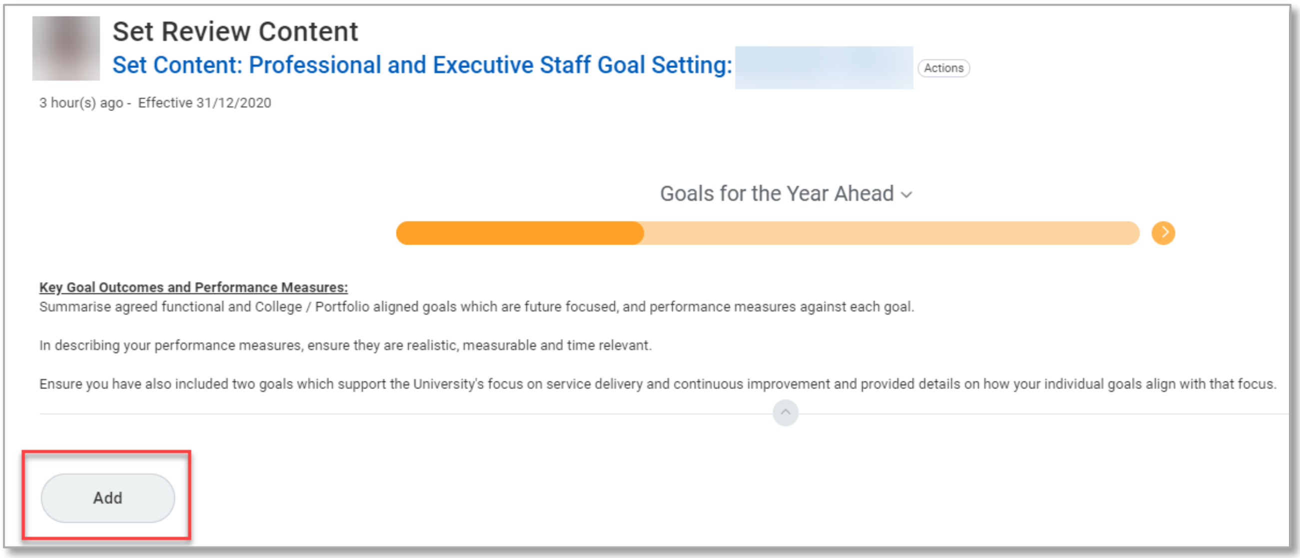
1. Open your Workday Inbox.



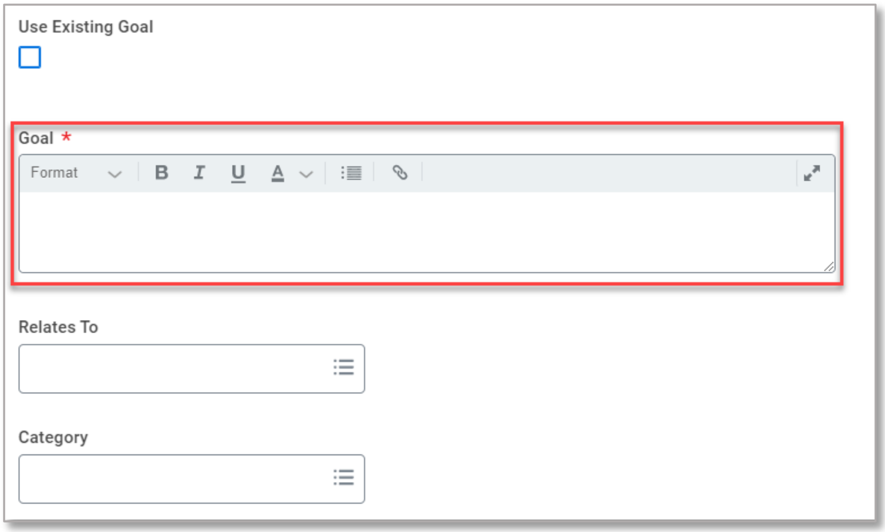
2. In the *Set Review Content* task in your inbox, select *Go to Guided Editor*.



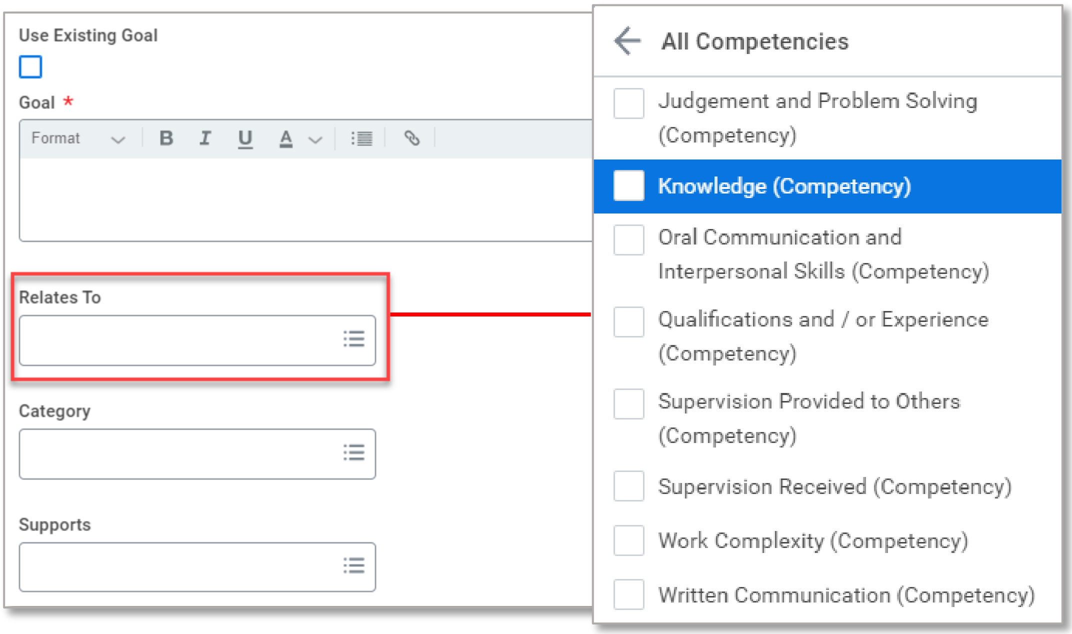
3. Goals for the Year Ahead will appear. Click *Add.*



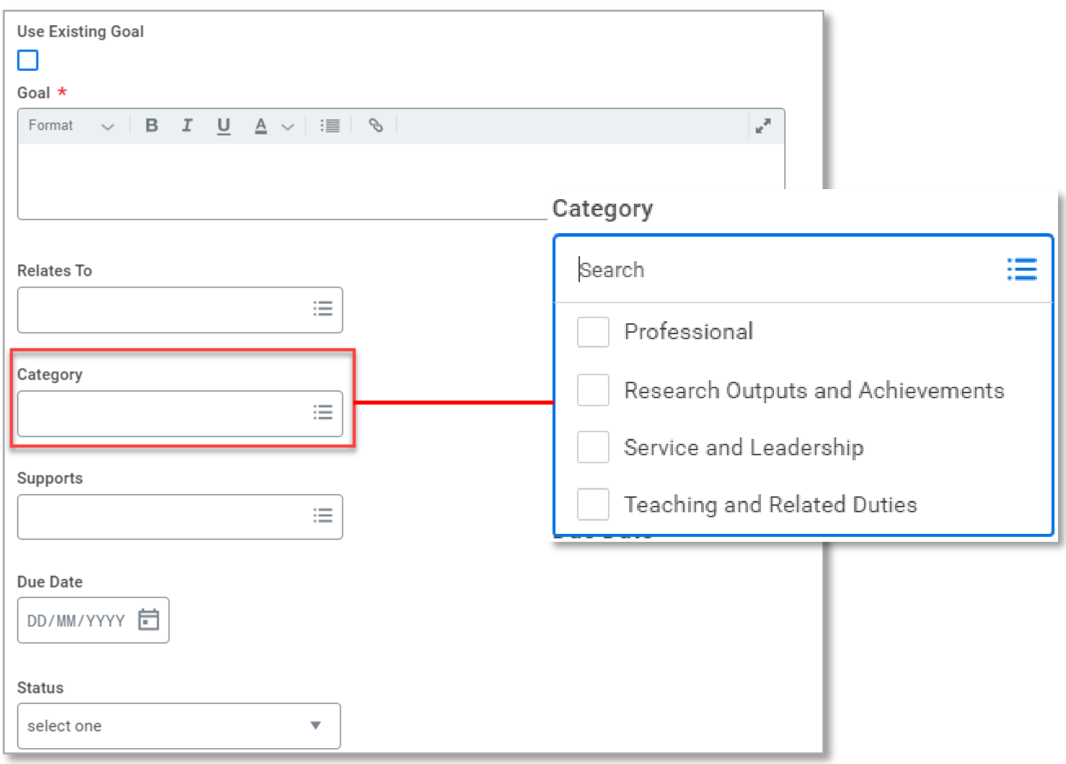
4. Enter your goal in the free text box marked *Goal.*



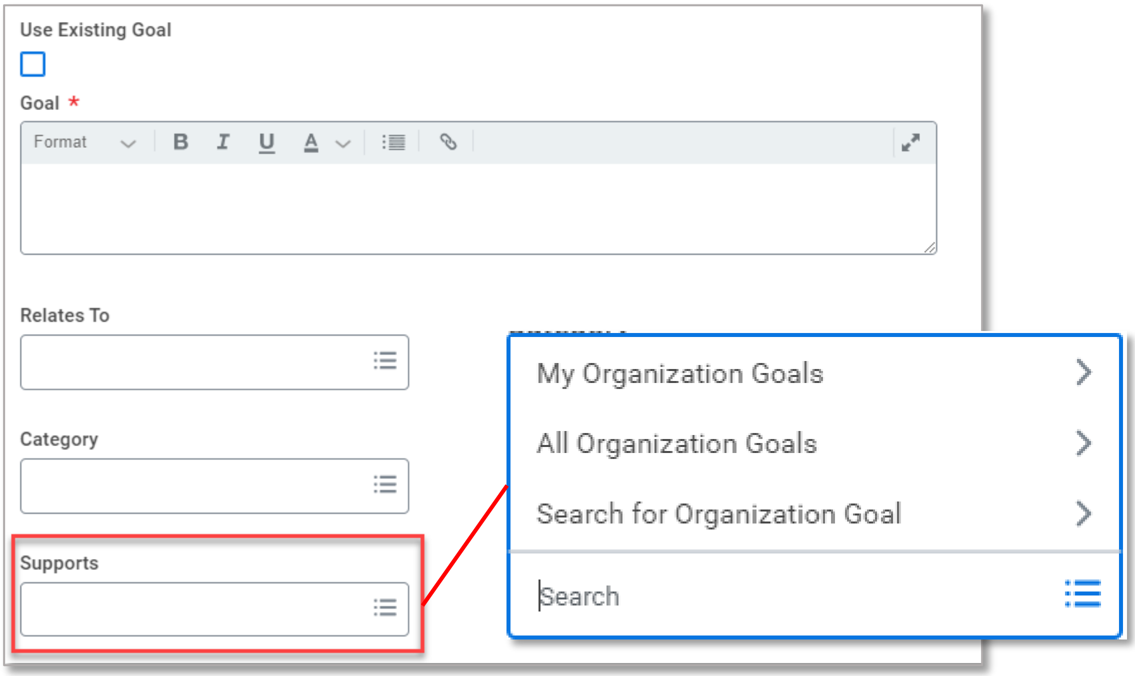
5. Select what competencies the goal *Relates To.*



6. Select the *Category.*

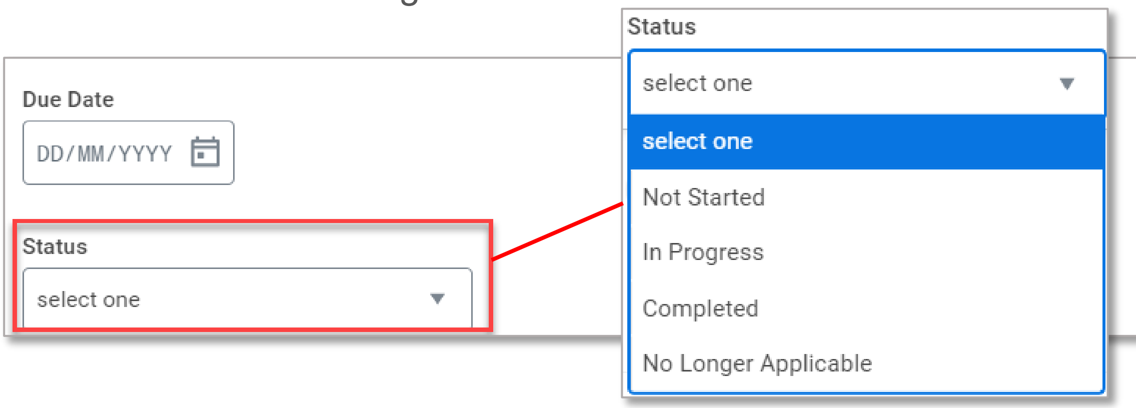


7. Select what goal this new goal *Supports.* This will be for the instance you have a goal in existence already which this new goal aids in achieving.

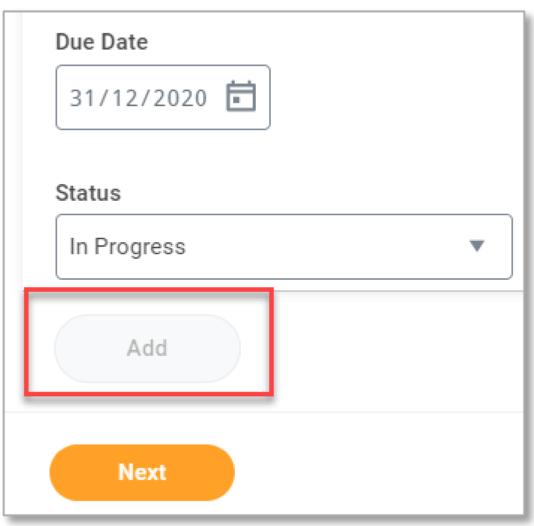


8. Enter the *Due Date* for the new goal.

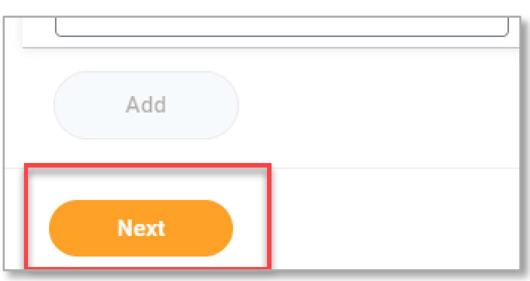
9. Select the *Status* of the goal.



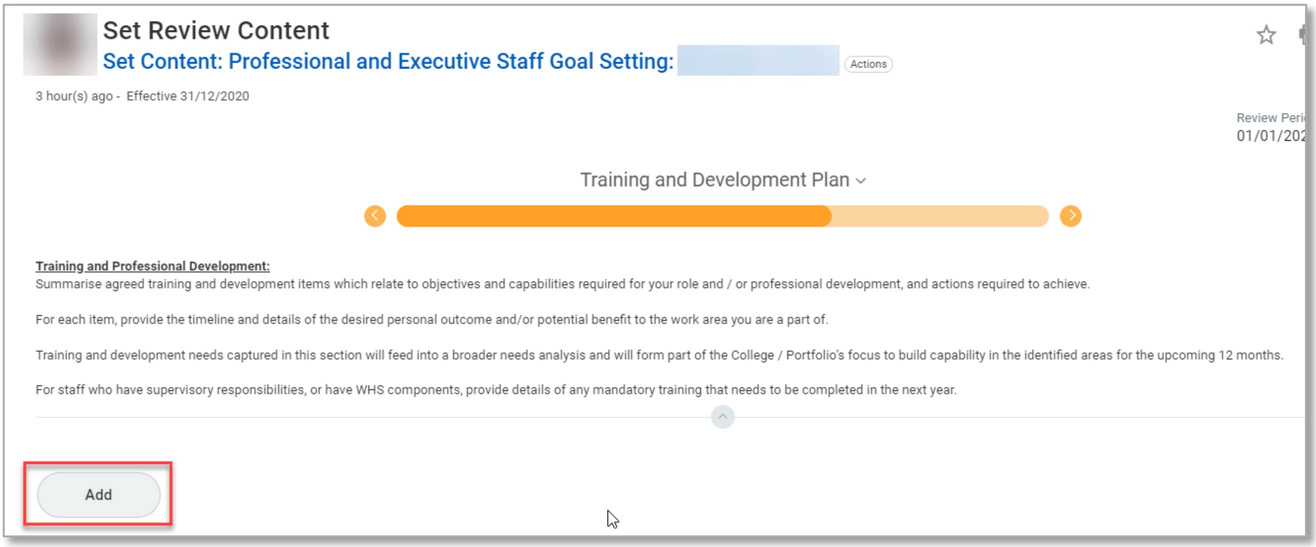
10. Click *Add* to create a new goal if required. Following steps 4-9 for the new goal. If no more goals are to be created go to step 11.



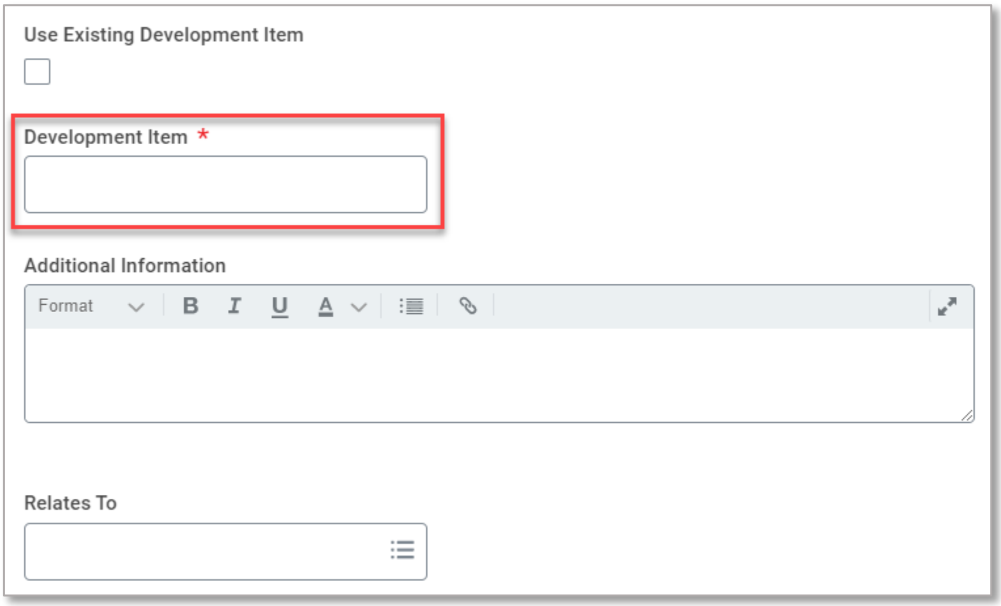
11. Click *Next.*



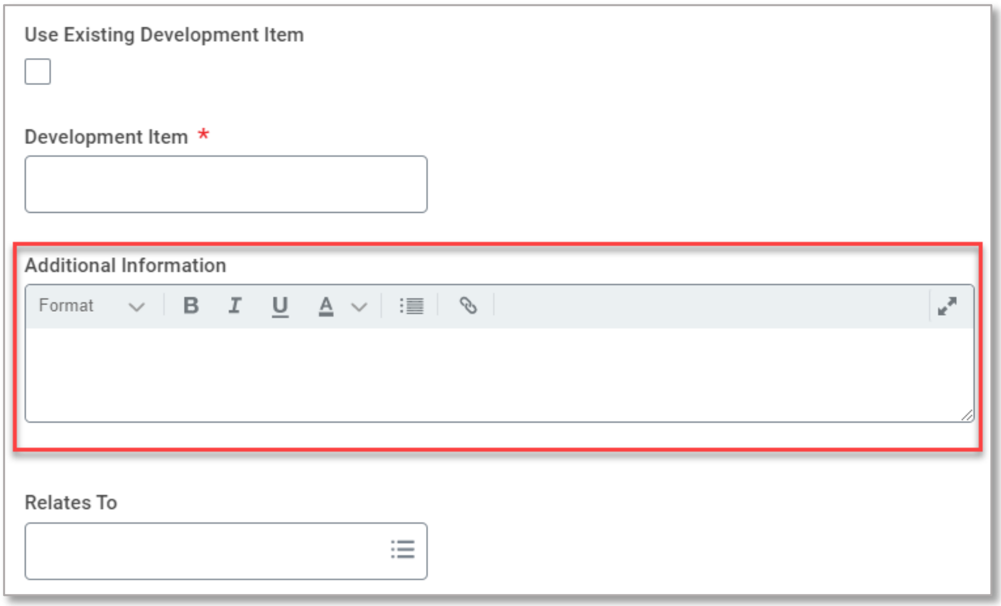
12. Training and Development Plan will appear. Click *Add.*



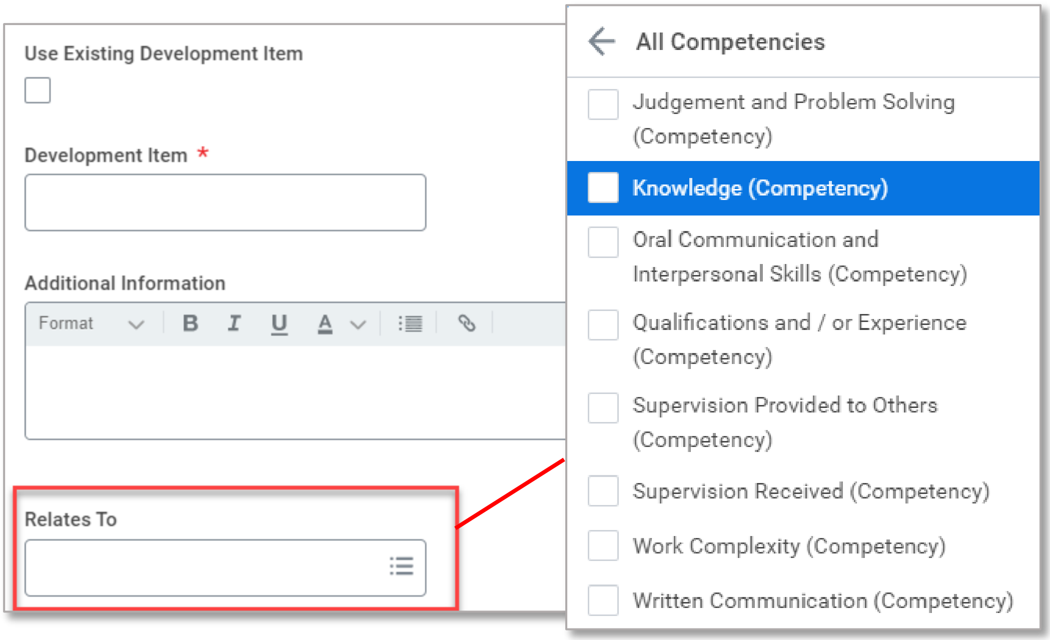
13. Enter your *Development Item,* or tick *Use Existing Development Item.*



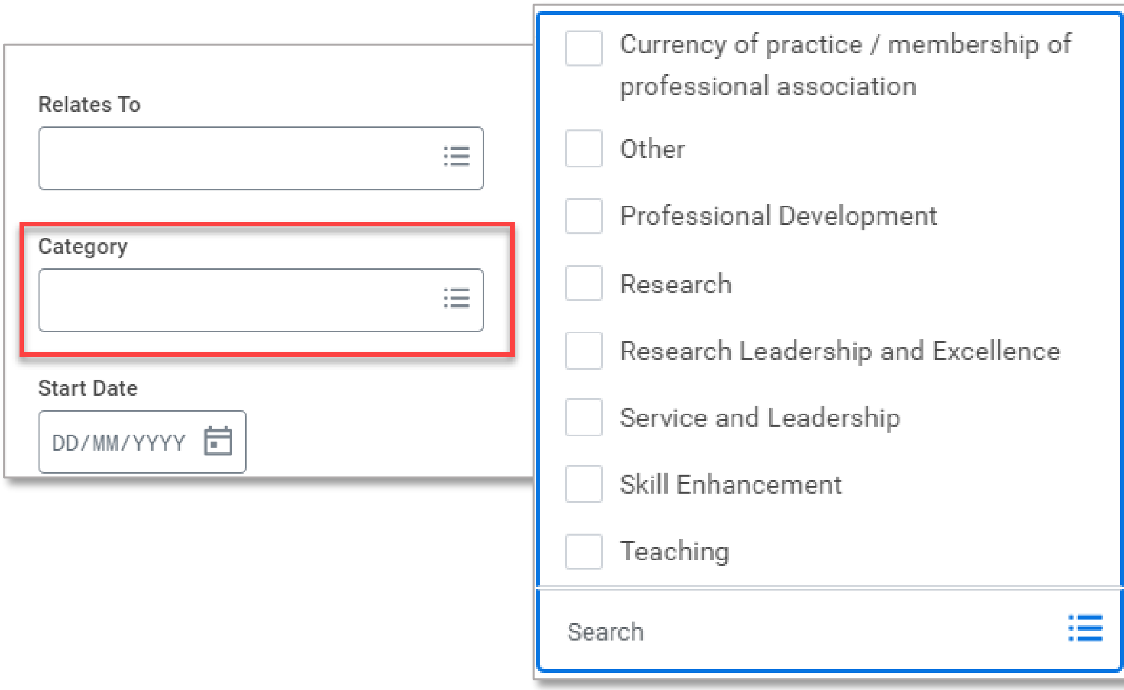
14. Type in *Additional Information* for the development item.



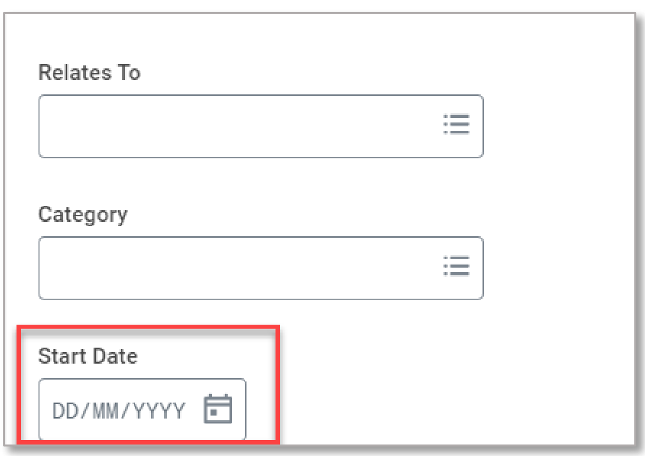
15. Select the competencies this development item *Relates To.*



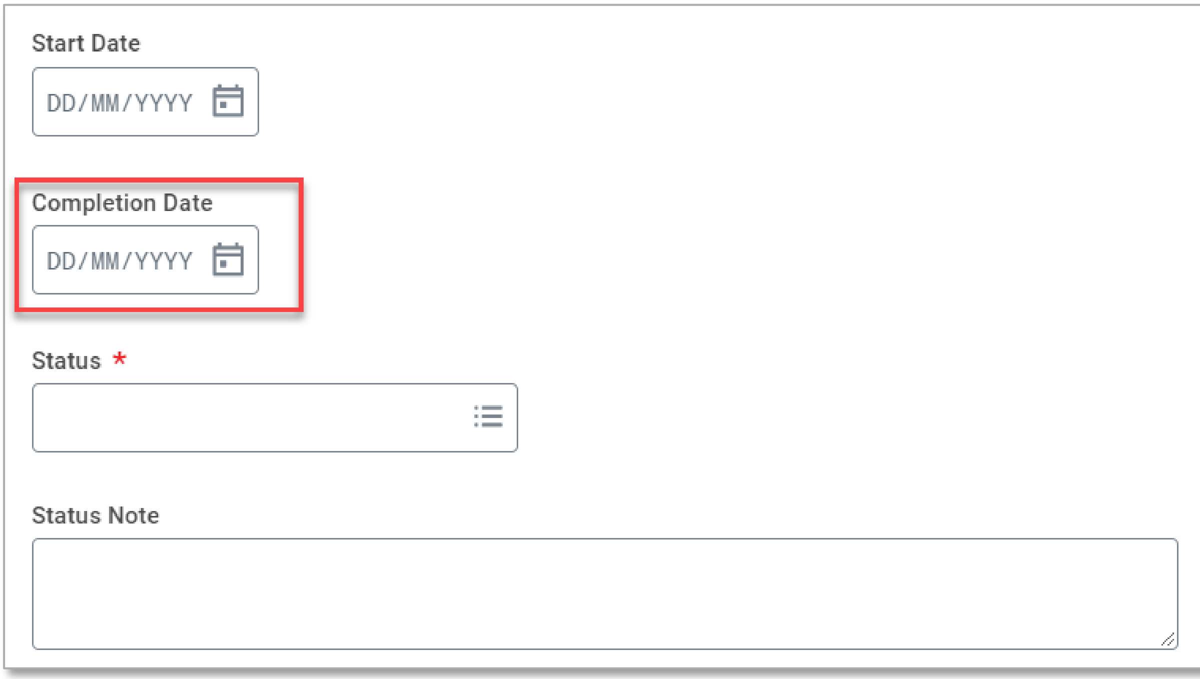
16. Select the *Category* of the development item.



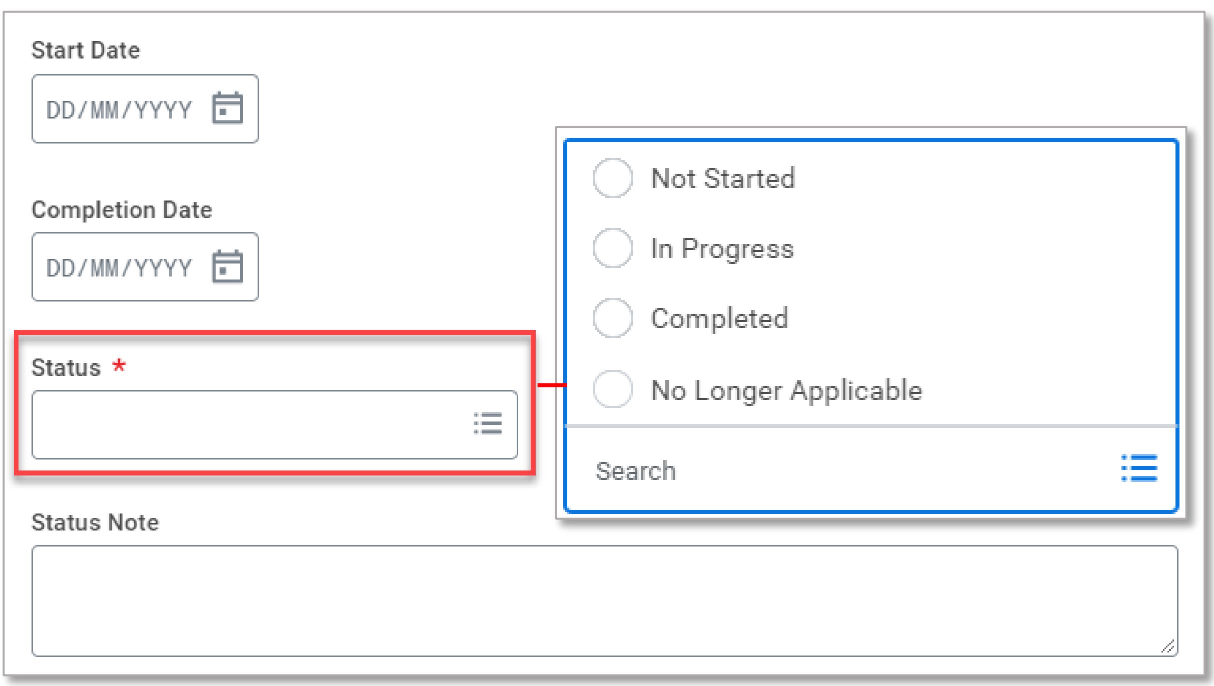
17. Enter the *Start Date* of the development item.



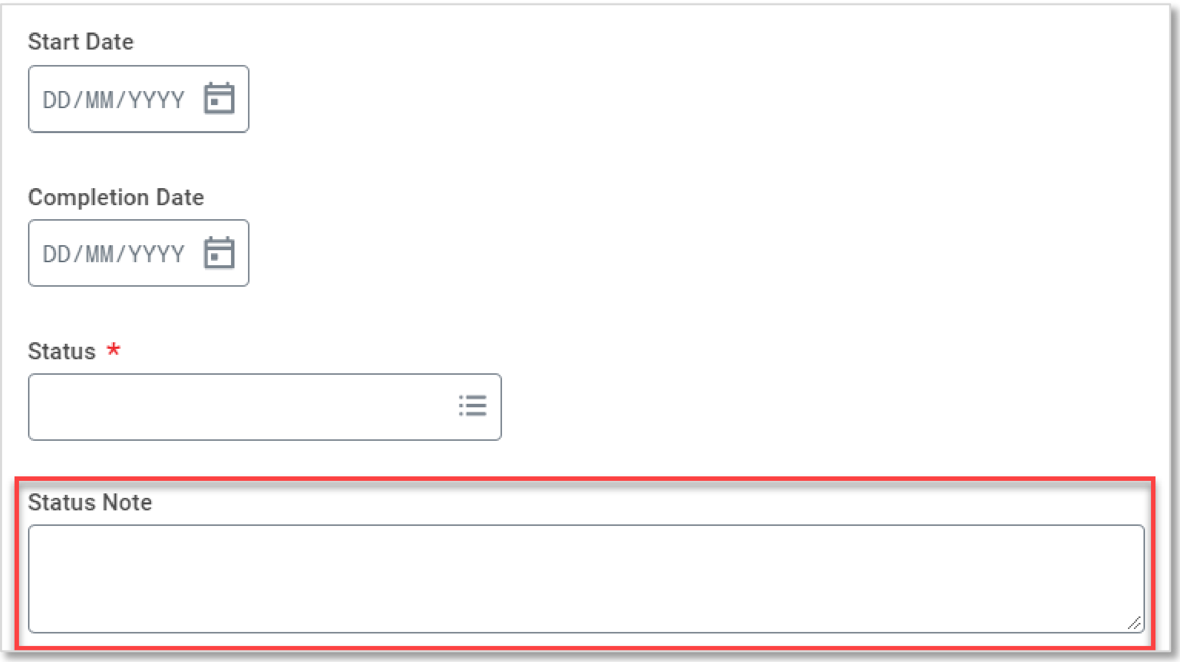
18. Enter the *Completion Date* of the development item (if known).



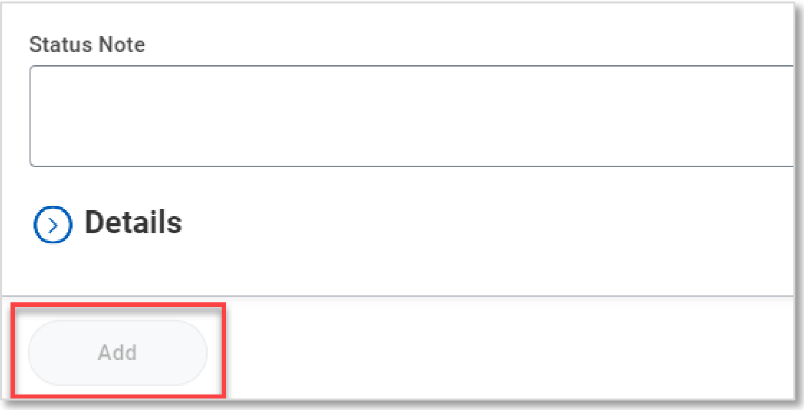
19. Select the *Status* of the development item.



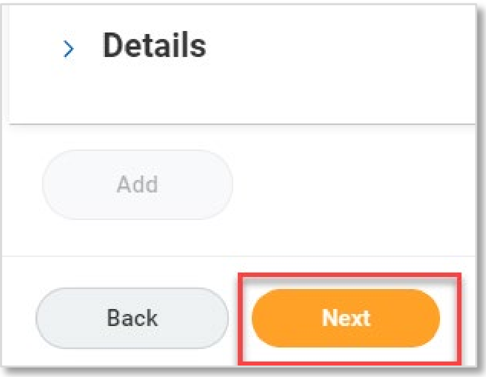
20. Enter a *Status Note* for the development item to assist in tracking where you are up to in the progress.



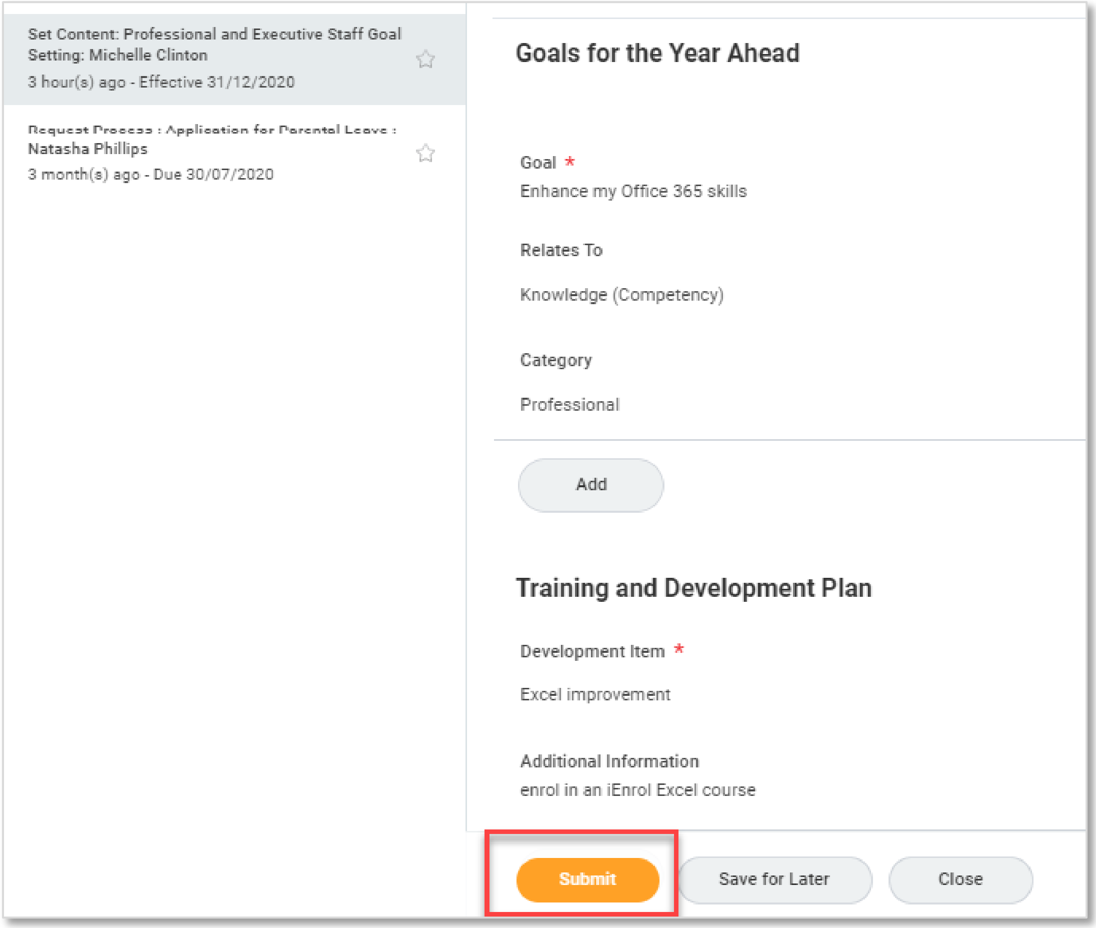
21. Click *Add* to create a new development item if required. Following steps 13-20 for the new development item. If no more development items are to be created go to step 22.



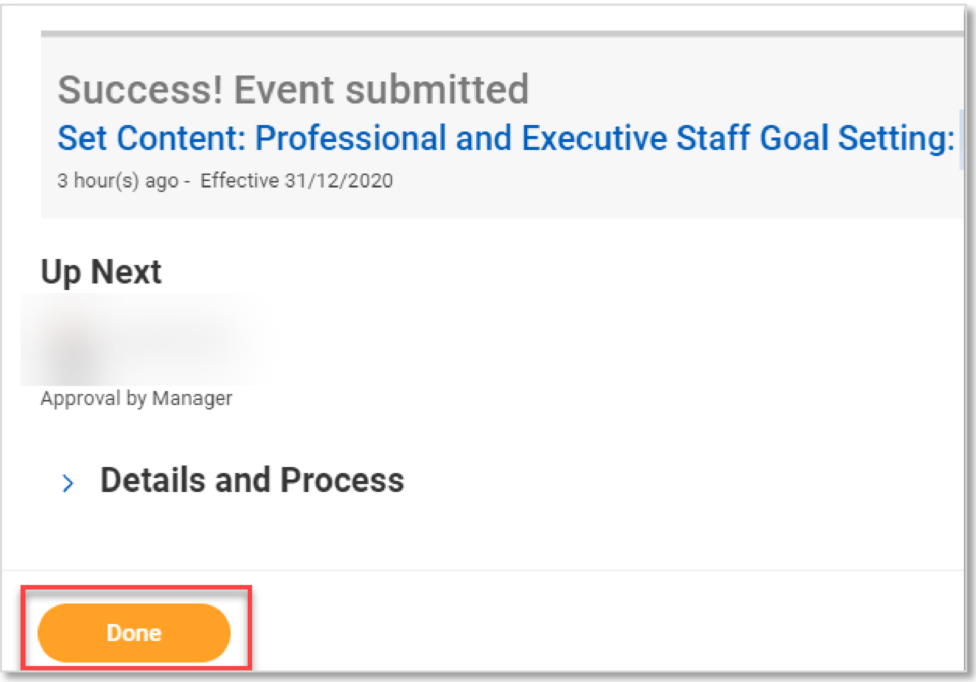
22. Click *Next.*



23. Review the information you have entered for your goals and development items.



24. Up Next is the approval step by your manager. Click *Done.*



This ends the goal setting process.