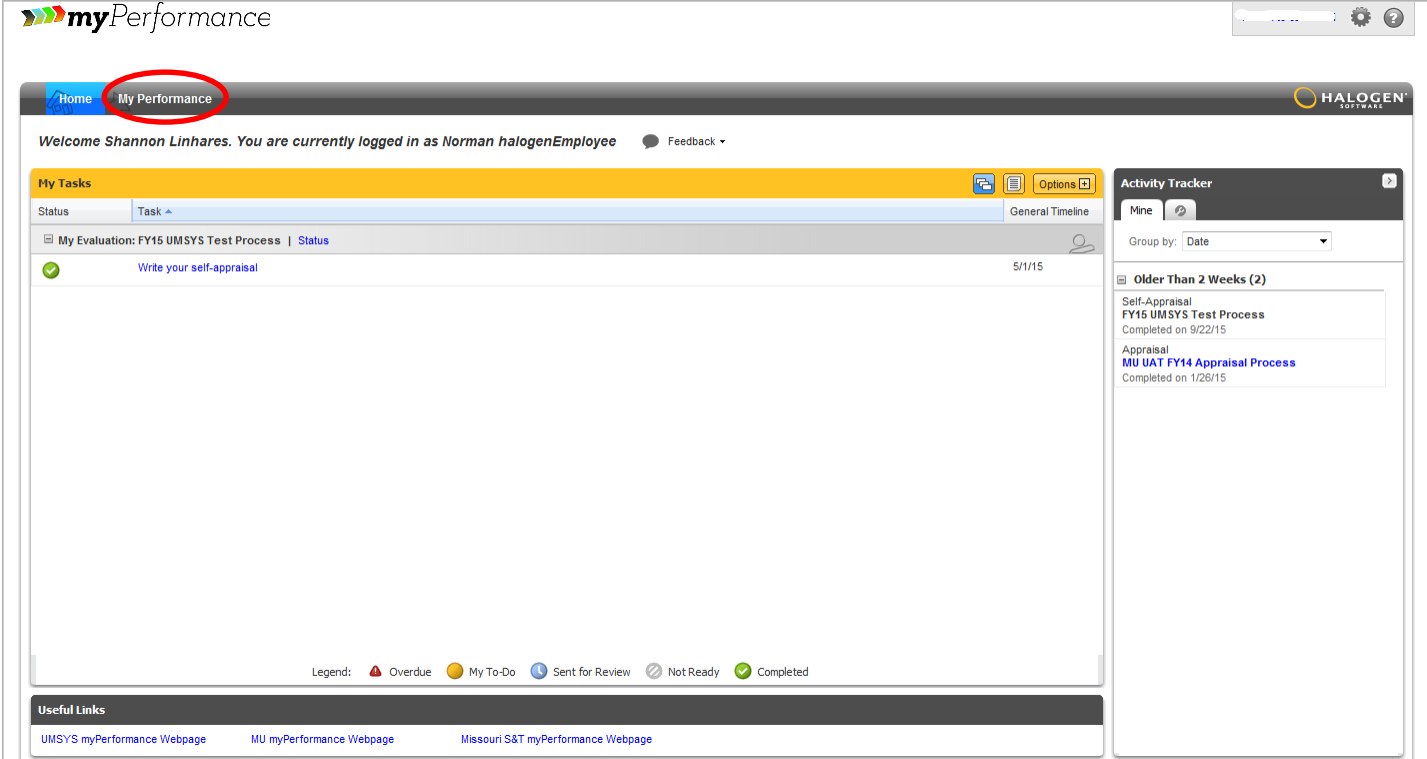


myPerformance *How to: Add and Edit Goals*

A “linked” goal is an individual goal that is connected, or linked, to a larger institutional goal. For instance, if the institution had an overall goal of increasing student retention by 10%, you could link your goal of “Create mentorship program for high risk students” to that larger goal. Follow the below steps to link your goals to the strategic plan in myPerformance.

1. Login to myPerformance.
2. Click on the “My Performance” tab.



The screenshot displays the myPerformance user interface. At the top left, the myPerformance logo is visible. Below it, a navigation bar contains 'Home' and 'My Performance' tabs, with 'My Performance' circled in red. A welcome message reads: 'Welcome Shannon Linhares. You are currently logged in as Norman halogenEmployee'. The main area is titled 'My Tasks' and shows a task list for 'My Evaluation: FY15 UMSYS Test Process'. A single task, 'Write your self-appraisal', is listed with a green checkmark and a due date of 5/1/15. The right sidebar, 'Activity Tracker', shows a list of activities under the heading 'Older Than 2 Weeks (2)', including 'Self-Appraisal FY15 UMSYS Test Process' (completed 9/22/15) and 'Appraisal MU UAT FY14 Appraisal Process' (completed 1/26/15). A legend at the bottom identifies task statuses: Overdue (red triangle), My To-Do (yellow circle), Sent for Review (blue clock), Not Ready (grey circle), and Completed (green checkmark). A 'Useful Links' section at the bottom provides links to 'UMSYS myPerformance Webpage', 'MU myPerformance Webpage', and 'Missouri S&T myPerformance Webpage'.

3. Click the "Goals" sub tab, and then "Add."

The screenshot displays the myPerformance software interface. At the top left is the logo "myPerformance". The top navigation bar includes "Home" and "My Performance" tabs, with "My Performance" selected. The "My Performance" section contains sub-tabs: "Goals", "Development Plans", "Feedback", "Evaluations", and "Documents". The "Goals" sub-tab is highlighted with a red circle. Below the sub-tabs is a "Goals" header with an "Add" button, a "Delete" button, and an "Options" menu, all of which are circled in red. The main content area shows a table with columns: "Progress Flag", "Linked", "Employee Goal", "% Complete", "Weight", "Entered By", "Modified Date", and "General Timeline". The table is currently empty, with the text "No records to display" on the right. At the bottom, a legend indicates: On Track (green circle), At Risk (yellow triangle), Not on Track (red exclamation mark), No Flag Set (grey circle), and Linked to Organizational Goal (yellow icon).

4. Type in any details of the goal that you would like, including:

- Title of the goal
- Description and corresponding metrics of the goal
- Weight of the goal (0%-100%)
- Action steps
- The start date, general timeline (i.e. due date), and completed date (to be filled out when the goal is complete)

The screenshot shows the 'Add Goal' dialog box in the myPerformance software. The dialog is titled 'Add Goal' and is for the employee 'Norman halogenEmployee'. The fields and their values are as follows:

- Employee: Norman halogenEmployee
- Title: (empty)
- Description/Metric: (empty)
- Action Steps: (empty)
- Progress on Action...: (empty)
- Linked To: None
- Category: None
- Start Date: (empty)
- General Timeline: (empty)
- Completed Date: (empty)
- Status: Select
- Percent Complete: 0%
- Progress Flag: On Track (selected), At Risk, Not on Track, No Flag Set
- Last Modified: 10/22/15
- Notes: (empty)

Red arrows point to the Title, Description/Metric, Action Steps, and Start Date fields. The 'Add' button is visible in the background interface.

5. Click the "Linked To" symbol.

The screenshot displays the myPerformance software interface. The main window shows a navigation menu with 'Home' and 'My Performance'. The 'My Performance' section is active, showing a 'Goals' tab. A modal dialog box titled 'Add Goal' is open, allowing the user to create a new goal for the employee 'Norman halogenEmployee'. The dialog includes fields for 'Title', 'Description/Metric', 'Action Steps', and 'Progress on Action...'. The 'Linked To' field is currently set to 'None' and is circled in red. Below this field are date pickers for 'Start Date', 'General Timeline', and 'Completed Date'. There is also a 'Status' dropdown menu and a 'Percent Complete' field. A 'Progress Flag' section contains four radio buttons: 'On Track' (green circle), 'At Risk' (yellow triangle), 'Not on Track' (red exclamation mark), and 'No Flag Set' (blue circle). The 'Last Modified' date is 10/22/15. At the bottom of the dialog are 'OK' and 'Cancel' buttons. A legend at the bottom of the main window identifies the icons: green circle for 'On Track', yellow triangle for 'At Risk', red exclamation mark for 'Not on Track', blue circle for 'No Flag Set', and a chain link for 'Linked to Organizational Goal'.

6. To find the goal you want to link to:

1. Select the process of the current fiscal year
2. Select the correct category
3. Click on each goal or sub-goal to see the description of that goal
4. Once you've chosen the correct goal to link to, check the box next to that goal, and then click "Link"

The screenshot displays the 'myPerformance' software interface. A modal dialog box titled 'Link to Organizational Goal' is open. The dialog contains the following elements:

- Process:** A dropdown menu set to 'FY16 Appraisal Process'.
- Category:** A dropdown menu set to 'Missouri S&T Strategic Plan Levers'.
- Organizational Goal:** A tree view showing a hierarchy of goals and themes. 'Theme 1' is expanded, and '1.3' is selected.
- Description/Metric:** A text area containing the description: 'Establish database of measures to define student access to faculty and staff'.
- Buttons:** 'Link' and 'Cancel' buttons at the bottom right. The 'Link' button is circled in red.

Red arrows point to the 'Process' and 'Category' dropdowns, the '1.3' goal in the tree view, and the 'Description/Metric' text area. A legend at the bottom of the page includes icons for 'On Track', 'At Risk', 'Not on Track', 'No Flag Set', and 'Linked to Organizational Goal'.

7. Edit any goal information if necessary, and then click "OK"

The screenshot displays the 'myPerformance' software interface. A modal dialog box titled 'Add Goal' is open, allowing for the creation of a new goal. The dialog includes the following fields and options:

- Employee:** Norman halogenEmployee
- Weight:** [Empty field]
- Title:** [Text input field]
- Description/Metric:** [Text area]
- Action Steps:** [Text area]
- Progress on Action...:** [Text area]
- Linked To:** 1.3 (with a link icon)
- Category:** Missouri S&T Strategic Plan Levers
- Approval Status:** Draft
- Start Date:** [Date picker]
- General Timeline:** [Date picker]
- Completed Date:** [Date picker]
- Status:** Select (dropdown menu)
- Percent Complete:** 0% (dropdown menu)
- Progress Flag:** Radio buttons for On Track (green circle), At Risk (yellow triangle), Not on Track (red exclamation mark), and No Flag Set (grey circle).
- Last Modified:** 10/22/15

The 'OK' button at the bottom right of the dialog is circled in red, indicating the final step in the process. The background shows the 'My Performance' dashboard with a 'Goals' tab selected, displaying a table with columns for 'd Date' and 'General Timeline', and a message 'No records to display'.

Legend: ● On Track ▲ At Risk ! Not on Track ○ No Flag Set 🔗 Linked to Organizational Goal

8. Once there are goals in your "Goals" sub tab, you can edit them or keep track of your progress at any time. To do so, click on the title of the goal.

The screenshot displays the myPerformance software interface. At the top left is the logo "myPerformance" and at the top right is the HALOGEN SOFTWARE logo. The main navigation bar includes "Home" and "My Performance". Below this, a sub-tab bar contains "Goals", "Development Plans", "Feedback", "Evaluations", and "Documents". The "Goals" sub-tab is active, showing a table with the following columns: Progress Flag, Linked, Employee Goal, % Complete, Weight, Entered By, Modified Date, and General Timeline. A single goal is listed with a progress flag of 0%, a weight of 0, entered by "Shannon Linhares as Norman halogenEmployee", and a modified date of "10/22/15". A red arrow points to the "Student database" link in the "Linked" column. The bottom of the interface features a legend with icons for "On Track", "At Risk", "Not on Track", "No Flag Set", and "Linked to Organizational Goal".

Progress Flag	Linked	Employee Goal	% Complete	Weight	Entered By	Modified Date	General Timeline
0%	Student database		0%	0	Shannon Linhares as Norman halogenEmployee	10/22/15	

Legend: On Track At Risk Not on Track No Flag Set Linked to Organizational Goal

9. Use any or all of the following to help keep track of your progress on a goal:

- Progress on Action Steps
- Status
- Percent Complete
- Progress Flag
- Notes

The screenshot displays the 'myPerformance' software interface. A 'Goal Details' dialog box is open, showing the following fields and options:

- Title:** Student database
- Description/Metric:** (Empty text area)
- Action Steps:** (Empty text area)
- Progress on Action...:** (Empty text area)
- Linked To:** 1.3
- Category:** Missouri S&T Strategic Plan Levers
- Start Date:** (Empty date field)
- General Timeline:** (Empty date field)
- Completed Date:** (Empty date field)
- Status:** Select (Dropdown menu)
- Percent Complete:** 0% (Dropdown menu)
- Progress Flag:** Radio buttons for On Track (green circle), At Risk (yellow triangle), Not on Track (red exclamation mark), and No Flag Set (blue circle with slash).
- Notes:** Add a note... (Text area)

At the bottom of the dialog box, there are 'OK' and 'Cancel' buttons. A legend at the bottom of the screen identifies the icons: On Track (green circle), At Risk (yellow triangle), Not on Track (red exclamation mark), No Flag Set (blue circle with slash), and Linked to Organizational Goal (yellow circle with number).