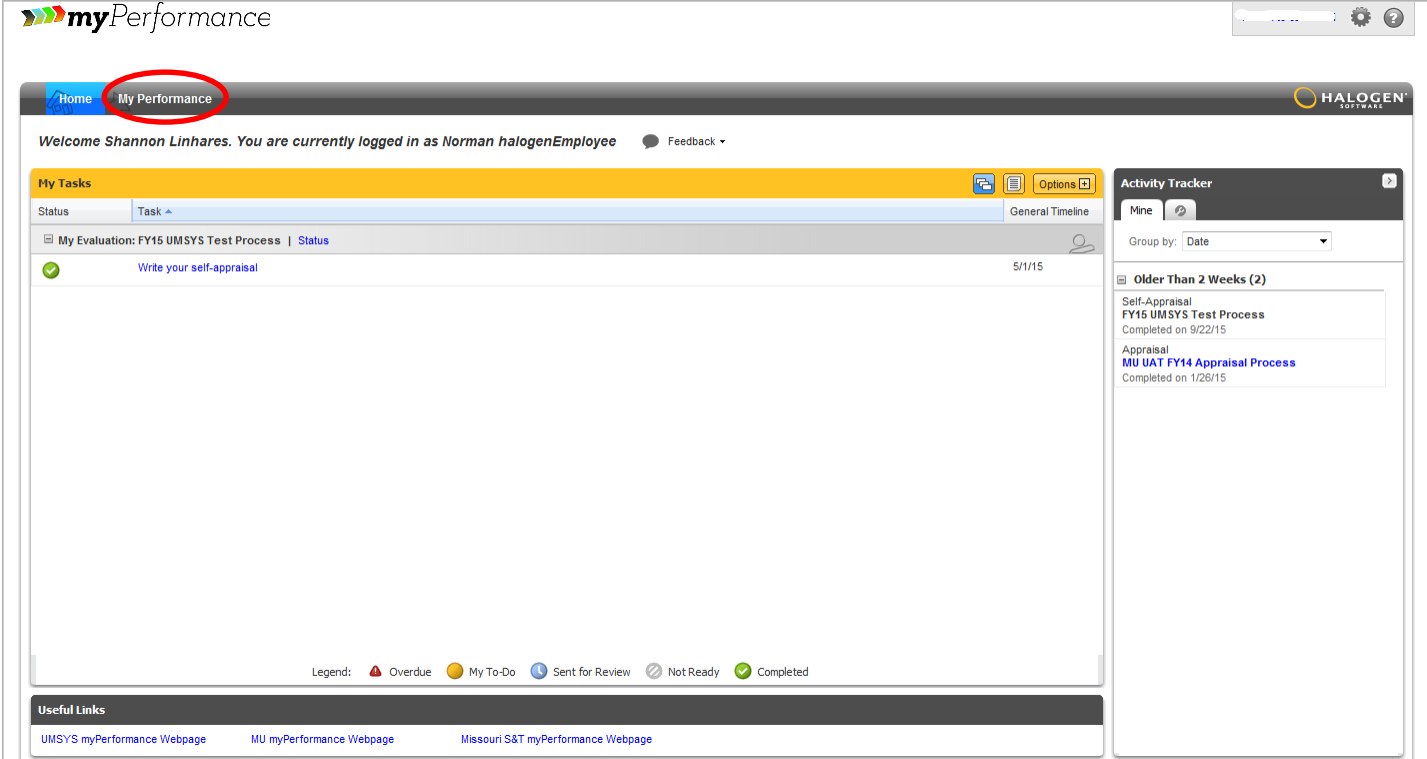


# myPerformance *How to: Add and Edit Goals*

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 web application interface. At the top left, the myPerformance logo is visible. The navigation bar includes a "Home" tab and a "My Performance" tab, which is circled in red. Below the navigation bar, a welcome message reads: "Welcome Shannon Linhares. You are currently logged in as Norman halogenEmployee". The main content area is titled "My Tasks" and shows a task list under the heading "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. A legend at the bottom of the task list identifies various status icons: Overdue (red triangle), My To-Do (yellow circle), Sent for Review (blue clock), Not Ready (grey circle), and Completed (green checkmark). On the right side, an "Activity Tracker" sidebar is visible, showing a list of completed activities, including "Self-Appraisal FY15 UMSYS Test Process" and "Appraisal MU UAT FY14 Appraisal Process".

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 has sub-tabs: "Goals", "Development Plans", "Feedback", "Evaluations", and "Documents". The "Goals" sub-tab is selected and circled in red. Below the sub-tabs is a "Goals" header with an "Add" button circled in red, along with "Delete" and "Options" buttons. A table below the header shows columns for "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 associated with the employee 'Norman halogenEmployee'. The fields and options are as follows:

- Title:** A text input field with a red arrow pointing to it.
- Description/Metric:** A text input field with a red arrow pointing to it.
- Action Steps:** A text input field with a red arrow pointing to it.
- Progress on Action...:** A text input field.
- Weight:** A text input field with a red arrow pointing to it.
- Start Date:** A date picker field with a red arrow pointing to it.
- General Timeline:** A date picker field.
- Completed Date:** A date picker field.
- Status:** A dropdown menu currently set to 'Select'.
- Percent Complete:** A dropdown menu currently set to '0%'.
- Progress Flag:** A section with four radio button options: 'On Track' (green circle), 'At Risk' (yellow triangle), 'Not on Track' (red exclamation mark), and 'No Flag Set' (grey circle).
- Linked To:** A dropdown menu currently set to 'None'.
- Category:** A dropdown menu currently set to 'None'.
- Last Modified:** 10/22/15.
- Notes:** A text area for additional information.

At the bottom of the dialog are 'OK' and 'Cancel' buttons. The background shows the 'My Performance' interface with a 'Goals' tab selected and a table with columns for 'Start Date' and 'General Timeline'.

5. Click the "Linked To" symbol.

The screenshot displays the 'myPerformance' software interface. A modal window titled 'Add Goal' is open, showing the following fields and options:

- Employee: Norman halogenEmployee
- Weight: [ ]
- Title: [ ]
- Description/Metric: [ ]
- Action Steps: [ ]
- Progress on Actio...: [ ]
- Linked To:  None (This field is circled in red)
- Category: None
- Start Date: [ ]
- General Timeline: [ ]
- Completed Date: [ ]
- Status: Select [ ]
- Percent Complete: 0% [ ]
- Progress Flag:  On Track,  At Risk,  Not on Track,  No Flag Set
- Last Modified: 10/22/15
- Notes: [ ]

At the bottom of the dialog, there are 'OK' and 'Cancel' buttons. A legend at the bottom of the main window identifies the symbols: 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).

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 shows the 'myPerformance' software interface. A modal dialog box titled 'Link to Organizational Goal' is open. The dialog has a title bar with a close button. Inside, there's a section 'Select one goal to link.' with two dropdown menus: 'Process' set to 'FY16 Appraisal Process' and 'Category' set to 'Missouri S&T Strategic Plan Levers'. Below these is a tree view of 'Organizational Goal' with a search box. The tree includes 'Goal 1' through 'Goal 4', 'Theme 1' through 'Theme 2', and sub-items like '1.1' through '1.5'. A red arrow points to '1.3'. To the right of the tree is a list of descriptions, with 'Missouri S&T Strategic Plan...' repeated for several items. A red arrow points to the description 'Establish database of measures to define student access to faculty and staff'. At the bottom right, the 'Link' button is circled in red, and a 'Cancel' button is next to it. The background shows the 'My Performance' dashboard with tabs for 'Goals', 'Development Plans', and 'Feedback'. A legend at the bottom indicates status icons: On Track (green circle), At Risk (yellow triangle), Not on Track (red exclamation mark), No Flag Set (grey circle), and Linked to Organizational Goal (blue icon).

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 in the center. The dialog contains the following fields and options:

- Employee: Norman halogenEmployee
- Weight: [Empty field]
- Title: [Empty text box]
- Description/Metric: [Empty text box]
- Action Steps: [Empty text box]
- Progress on Action...: [Empty text box]
- 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
- Buttons: OK (circled in red) and Cancel.

At the bottom of the main application window, a legend is visible:

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 shows "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%	<a href="#">Student database</a>		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

