



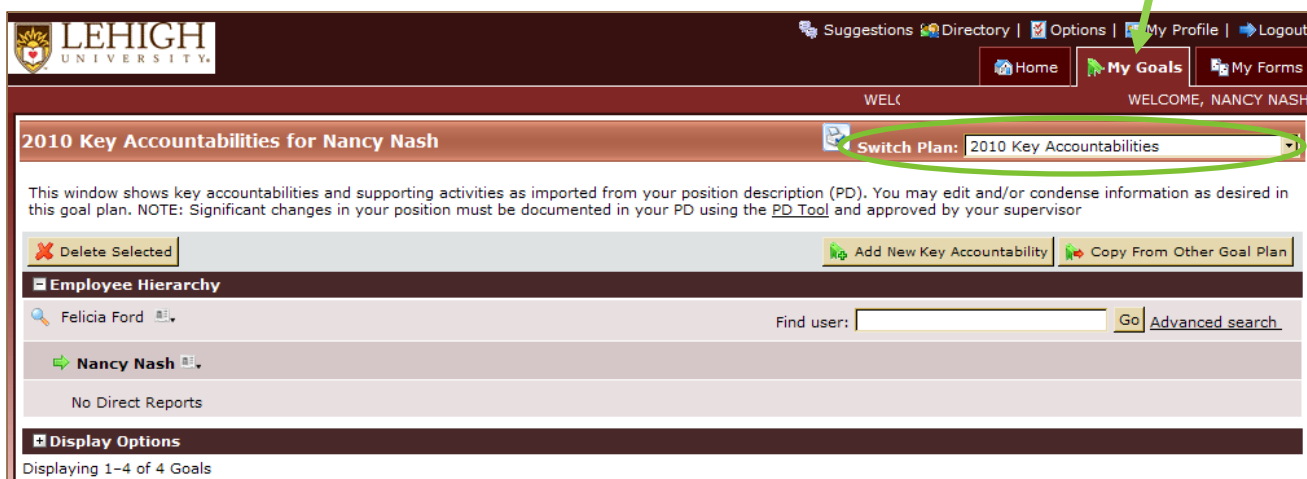
Working in the My Goals Tab

What's the My Goals tab in the online GPS Tool?

The online tool uses the word “goal” as a broad, generic term and uses a series of goal plans to store the content that is entered into the GPS appraisal form. This includes key accountabilities (for classified staff), goals and objectives, and workplace learning activities. Each of these elements has its own specific goal plan for each year. Currently available goal plans include:

- 2010 & 2011 Key Accountabilities [for classified staff]
- 2010 & 2011 GPS Goals & Objectives [for classified staff]
- 2010 & 2011 Researcher GPS Goals & Objectives [for research staff]
- 2010 & 2011 Workplace Learning [for classified and research staff]

The goal plans can be easily viewed by selecting the My Goals tab. While the contents of each goal plan can be entered and edited from the GPS appraisal form, there are a few things that can only be done from the My Goals tab. This handout explains the various features found in the My Goals tab.



The goal plans and appraisal form have an auto-sync configuration. Changes to content that are made in the appraisal form will automatically appear in the goal plans and vice versa.

The My Goals tab:

When working with goal plans, the first thing to do is to select the relevant goal plan from the *Switch Plan* drop-down list. In the screen shot above, the 2010 Key Accountabilities is selected in the *Switch Plan* field. In the next screen shot, this field has been switched to the 2011 GPS Goals & Objectives goal plan. You'll see that the goal plan is currently empty but notice that a GPS Goals & Objectives goal plan includes performance, development, and special project goals.

For each goal plan there are two or three action buttons. All goal plans will have an *Add New* or *Create New* button and a *Copy From Other Goal Plan* button. The Goals & Objectives goal plan also has a *Goal Wizard* button.

The Goal Wizard:

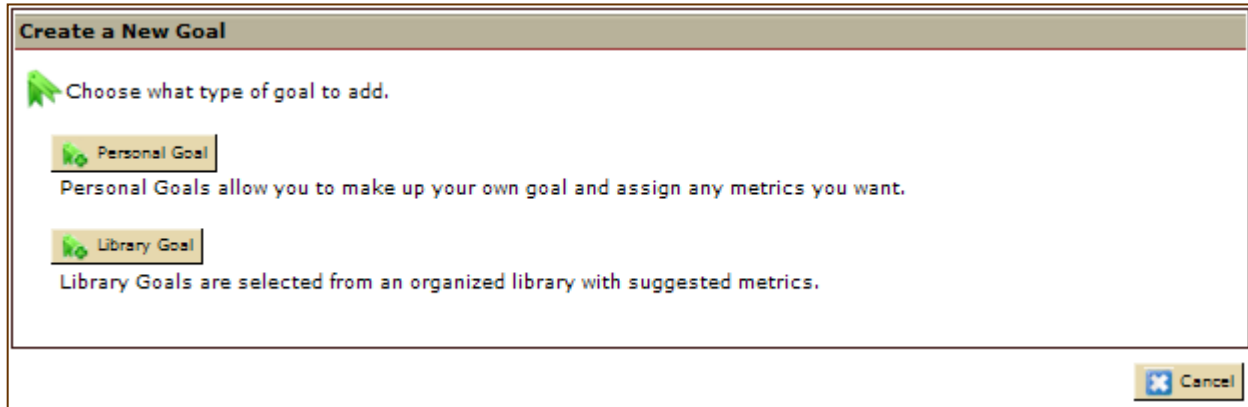
Available only in the GPS Goals & Objectives goal plans, the *Goal Wizard* button helps you formulate a SMART goal. Clicking on the Goal Wizard button opens up a window in which you will be asked to select the type of goal (performance, developmental, or special project).

“Performance” goal is the default setting. *Be sure to change the type of goal if you are entering a developmental or special project goal.*

The Goal Wizard walks you through a series of questions... What is your goal? How will you measure it? Is this goal attainable? Is this goal relevant? What is your time line (start date → end date)? After answering each question, you can advance to the next or go back to the previous question.

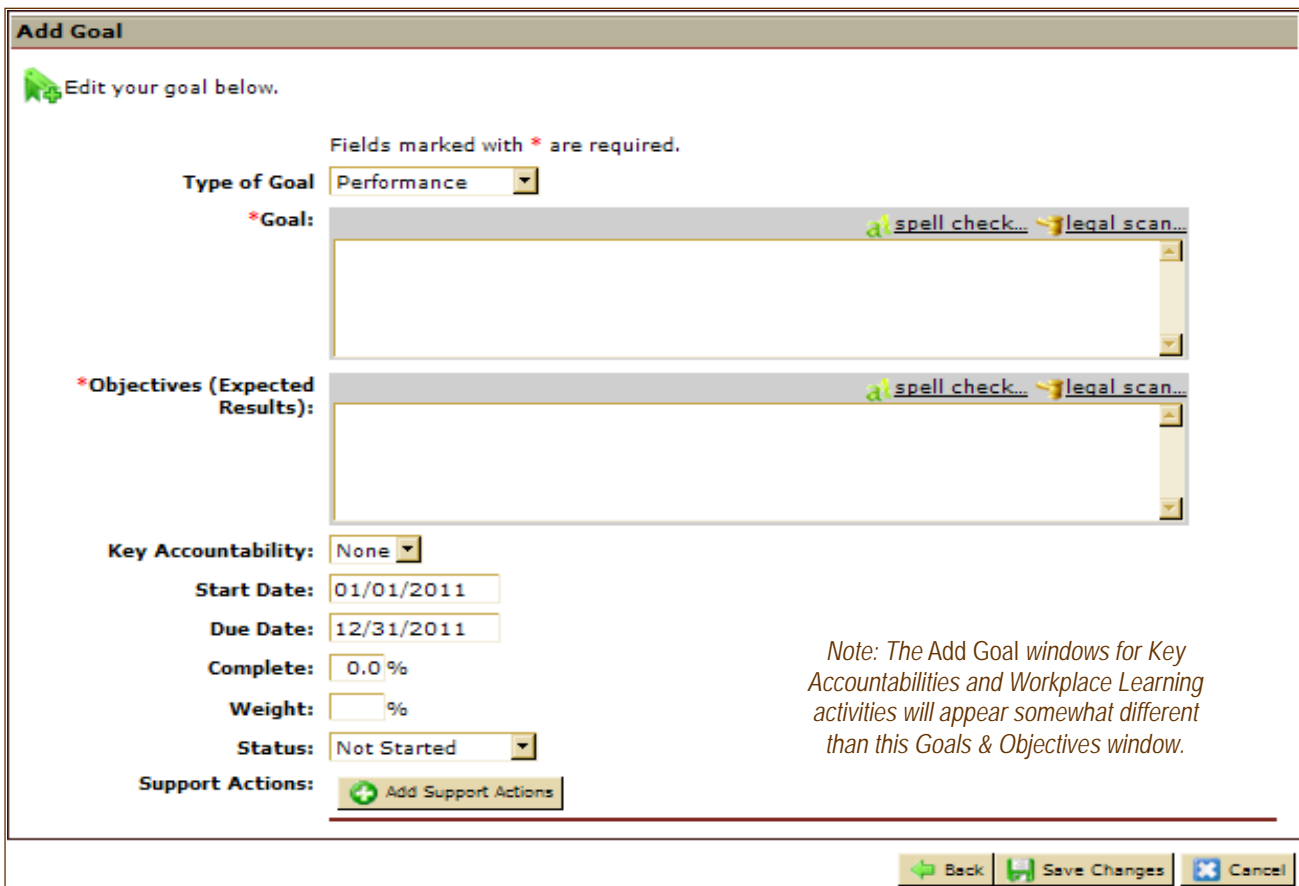
Creating a New Goal:

Most people will prefer to add a goal by selecting the *Create a New Goal* button. In the GPS Goals & Objectives goal plans, a preliminary window opens with a choice: Personal Goal or Library Goal.



The screenshot shows a dialog box titled "Create a New Goal". It contains two main options: "Personal Goal" and "Library Goal". The "Personal Goal" option is selected and highlighted. Below it, a description reads: "Personal Goals allow you to make up your own goal and assign any metrics you want." The "Library Goal" option is also visible with its description: "Library Goals are selected from an organized library with suggested metrics." At the bottom right, there is a "Cancel" button.

Select the Personal Goal button to enter a new goal. The next window that opens is the same one that appears when adding a new goal within the GPS appraisal form.



The screenshot shows the "Add Goal" form. It includes a "Type of Goal" dropdown menu set to "Performance". Below this are two text areas for "Goal" and "Objectives (Expected Results)", both marked with an asterisk as required. The "Key Accountability" dropdown is set to "None". There are input fields for "Start Date" (01/01/2011), "Due Date" (12/31/2011), "Complete" (0.0%), and "Weight" (empty). The "Status" dropdown is set to "Not Started". An "Add Support Actions" button is located at the bottom left. A note on the right side of the form reads: "Note: The Add Goal windows for Key Accountabilities and Workplace Learning activities will appear somewhat different than this Goals & Objectives window." At the bottom right, there are "Back", "Save Changes", and "Cancel" buttons.

By default, the *Type of Goal* field is set as Performance but a drop-down menu lets you change the type of goal to Developmental or Special Project. The goal statement and specific objective(s) are required fields. Start and end dates can be adjusted. Weighting is not required unless you are adding a special project goal. The *Add Support Actions* button will open up additional fields that may be helpful to define project phases or milestones that need to be achieved to accomplish the goal.

Copying Goal Plans:

The *Copy From Other Goal Plan* button is used primarily to copy key accountabilities from one year to the next. It can also be used to copy goals and workplace learning activities that span more than one performance cycle.

Important Notes:

The Switch Plan field should be set to the goal plan you want to copy items INTO – i.e., the final destination!

Don't mix your goal plans! Be sure you're coping key accountabilities to key accountabilities, workplace learning to workplace learning, etc.

Step 1 is to select the goal plan with the items you want to copy.

Step 1. Select Goal Plan

1 Step 1 of 2. Select the goal plan with the goal(s) you want to copy.

| Goal Plan Name |
|--|
| <input type="radio"/> 2010 Key Accountabilities |
| <input type="radio"/> 2011 Workplace Learning |
| <input type="radio"/> CAS Goal Plan |
| <input checked="" type="radio"/> 2010 GPS Goals & Objectives |
| <input type="radio"/> 2010 Workplace Learning |
| <input type="radio"/> 2010 GPS Researcher Goals & Objectives |
| <input type="radio"/> 2009 Key Accountabilities |
| <input type="radio"/> 2009 GPS Goals & Objectives |
| <input type="radio"/> 2009 GPS Researcher Goals & Objectives |

From the list of available goal plans, select the desired goal plan and then hit the Next button.

↓

Step 2. Select Goal

2 Step 2 of 2. Select Goal

| Goal | Objectives (Expected Results) | Status |
|---|--|-------------|
| <input checked="" type="checkbox"/> 1.1 2011 Winter Symposium | Plan, organize, and coordinate arrangements for the 2010 Winter Symposium | Not Started |
| <input type="checkbox"/> 1.2 Arrange the 2010 doctoral thesis presentations. | Plan and coordinate 17 doctoral presentations. | Completed |
| Special Projects | | |
| Goal | Objectives (Expected Results) | Status |
| <input type="checkbox"/> 2.1 Serve on the Faculty & Staff Appreciation Dinner Committee. | Contribute planning and organizational skills to the 2009 Appreciation Dinner. | Completed |
| Developmental | | |
| Goal | Objectives (Expected Results) | Status |
| <input type="checkbox"/> 3.1 Orient and train new academic coordinators in the Product Engineering and Packaging Engineering departments. | Train two new academic coordinators on college/university policies and procedures by mid-August. | On Track |

Step 2 is to select only those items that you want to copy forward.

In this screen shot, only one of four goals has been selected.

Once the item(s) are selected, click the *Copy* button.

Now that we've added goals using the *Goal Wizard*, *Create a New Goal*, and *Copy From Other Goal Plan* buttons, let's take another look at this 2011 GPS Goals & Objectives goal plan:

Viewing an Item in a Goal Plan

In the above screen shot, notice how each goal in the plan is underlined indicating a link.

Select the link and you will see a detail view of the goal information.

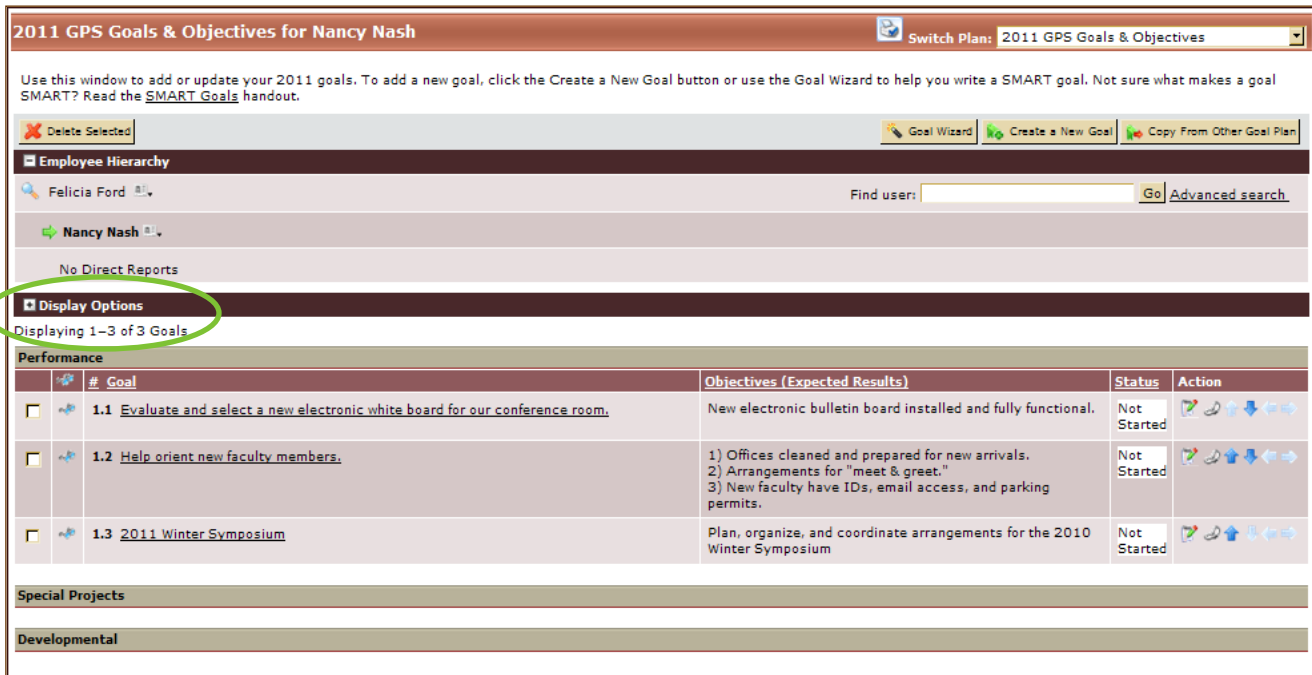
You'll also see an Audit History which will show the date that the goal was created and by whom. Subsequent edits will also be recorded.

Use the [Return to Goal Plan](#) link to return to the full view of the goal plan.

| Date | Action | User | |
|------------|---------|------------|-----------|
| 01/18/2011 | Created | Nancy Nash | displayed |

Changing the display options in a Goal Plan

Notice that this 2011 Goals & Objectives goal plan displays the goal, objectives, and status of each item listed.



2011 GPS Goals & Objectives for Nancy Nash

Use this window to add or update your 2011 goals. To add a new goal, click the Create a New Goal button or use the Goal Wizard to help you write a SMART goal. Not sure what makes a goal SMART? Read the [SMART Goals](#) handout.
















Employee Hierarchy

Nancy Nash

No Direct Reports

Display Options

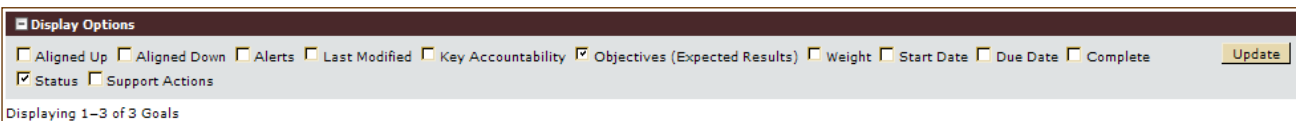
Displaying 1-3 of 3 Goals

| # | Goal | Objectives (Expected Results) | Status | Action |
|-----|---|---|-------------|---|
| 1.1 | Evaluate and select a new electronic white board for our conference room. | New electronic bulletin board installed and fully functional. | Not Started |      |
| 1.2 | Help orient new faculty members. | 1) Offices cleaned and prepared for new arrivals. 2) Arrangements for "meet & greet." 3) New faculty have IDs, email access, and parking permits. | Not Started |      |
| 1.3 | 2011 Winter Symposium | Plan, organize, and coordinate arrangements for the 2010 Winter Symposium | Not Started |      |

Special Projects

Developmental

You can change the information displayed by expanding the *Display Options* bar. Click on the [+] sign to expand this feature. The [+] sign changes to a [-] sign.



Display Options

Aligned Up Aligned Down Alerts Last Modified Key Accountability Objectives (Expected Results) Weight Start Date Due Date Complete

Status Support Actions

Displaying 1-3 of 3 Goals

The various display options can be turned on or off to change the visible display. After selecting the desired items to be displayed, use the *Update* button to activate the changes. Click on the [-] sign to hide the display options from view.

Changing the type of goal and other edits in a Goal Plan

The My Goals tab also lets you easily move goals from one type of goal category to another without copying and pasting.

As noted earlier, when adding a new goal, the *Type of Goal* field has a default setting of Performance. So far, all of the goals we added to our sample *2011 Goals & Objectives* goal plan have been entered as performance goals. But perhaps the first performance goal really should be a special project. Let's change it.

Goal type as well as content can be edited in the goal plan by selecting the pen and pad icon shown in the right-hand column of each item in the goal plan. Selecting the editing icon opens a goal content window that looks very much like the original *Create New Goal* window.



Notice how we can change the type of goal from performance to special project by utilizing the drop-down menu.

Edit Goal

Edit your goal below.

Drop-down menu used to change type of goal.

Fields marked with * are required.

Type of Goal: Special Projects

***Goal:** Evaluate and select a new electronic white board for our conference room.

***Objectives (Expected Results):** New electronic bulletin board installed and fully functional.

Key Accountability: None

Start Date: 06/01/2011

Due Date: 08/31/2011

Complete: 0.0 %

Weight: 100.0 %

Remember to save your changes!

Save as New Save Changes Cancel

The type of goal has been changed to a special project which should also be weighted. Since this is Nancy's only special project, let's weight it at 100%.

What's this button? If you need to add a goal that is similar to an existing goal, you can use the *edit goal* icon to make desired changes and then use the *Save as New* button. The existing goal will stay as it was but the revised goal will be added as a new goal.

Reordering items in a Goal Plan

Although not required, listing key accountabilities and goals in priority order is recommended – i.e., with the most important item in each goal plan listed first and the least important last. Likewise, list any workplace learning activities in chronologic order from earliest to most recent.

When items are entered into the GPS appraisal form, they appear in the order in which they were entered. Suppose priorities have changed and you want to change the order in which your key accountabilities appear. You can change the order from the *My Goals* tab. First, select the appropriate key accountabilities goal plan (make sure you've selected the right year!) from the switch plan drop-down menu.

Then re-order your accountabilities in this goal plan by using the blue arrow keys that appear in the right-hand column of each item in the goal plan. After each click of an arrow, the item will move either up or down and all items will re-number themselves.



Deleting items in a Goal Plan

Occasionally, you may need to delete items from a goal plan... your key accountabilities change or perhaps information was copied or entered into the wrong goal plan.

Step 2

Step 1

2011 GPS Goals & Objectives for Nancy Nash

Switch Plan: 2011 GPS Goals & Objectives

Use this window to add or update your 2011 goals. To add a new goal, click the Create a New Goal button or use the Goal Wizard to help you write a SMART goal. Not sure what makes a goal SMART? Read the [SMART Goals](#) handout.

Delete Selected

Goal Wizard Create a New Goal Copy From Other Goal Plan

Employee Hierarchy

Display Options

Displaying 1-4 of 4 Goals

| | # | Goal | Objectives (Expected Results) | Status | Action |
|-------------------------------------|-----|---|---|-------------|--------|
| <input type="checkbox"/> | 1.1 | Help orient new faculty members. | 1) Offices cleaned and prepared for new arrivals. 2) Arrangements for "meet & greet." 3) New faculty have IDs, email access, and parking permits. | Not Started | |
| <input type="checkbox"/> | 1.2 | 2011 Winter Symposium | Plan, organize, and coordinate arrangements for the 2010 Winter Symposium | Not Started | |
| Special Projects | | | | | |
| | # | Goal | Objectives (Expected Results) | Status | Action |
| <input type="checkbox"/> | 2.1 | Evaluate and select a new electronic white board for our conference room. | New electronic bulletin board installed and fully functional. | Not Started | |
| <input checked="" type="checkbox"/> | 2.2 | Serve on the Faculty & Staff Appreciation Dinner Committee. | Contribute planning and organizational skills to the 2010 Appreciation Dinner. | Completed | |
| Developmental | | | | | |

To delete an item, simply click on the box in the first column to the left of the item(s) to be deleted and then click on the **X Delete Selected** button.

Employee Hierarchy Feature

Just below the *Delete Selected* button there is another feature, *Employee Hierarchy*, which shows reporting relationships between supervisors and direct reports. Use the [+] sign to see the reporting hierarchy or the [-] sign to hide it from view.

2011 GPS Goals & Objectives for Nancy Nash

Switch Plan: 2011 GPS Goals & Objectives

Use this window to add or update your 2011 goals. To add a new goal, click the Create a New Goal button or use the Goal Wizard to help you write a SMART goal. Not sure what makes a goal SMART? Read the [SMART Goals](#) handout.

Delete Selected

Goal Wizard Create a New Goal Copy From Other Goal Plan

Employee Hierarchy

Felicia Ford

Find user: Go [Advanced search](#)

Nancy Nash

No Direct Reports

Display Options

Displaying 1-4 of 4 Goals

Supervisors can use the *Employee Hierarchy* feature to see the various goal plans of their direct reports. The green arrow indicates that we're looking at Nancy Nash's goal plan. Clicking on the magnifying glass by Felicia Ford's name changes the view to Felicia's goal plan although Nancy won't be able to see her supervisor's goals. The GPS online tool is currently configured so that users can view goal plans of anyone below them in their hierarchical structure but not above them. *Be sure to select the desired goal plan from the Switch Plan drop-down menu.*