



Creating Goals in Totara

Introduction for Managers Creating Goals for Employees

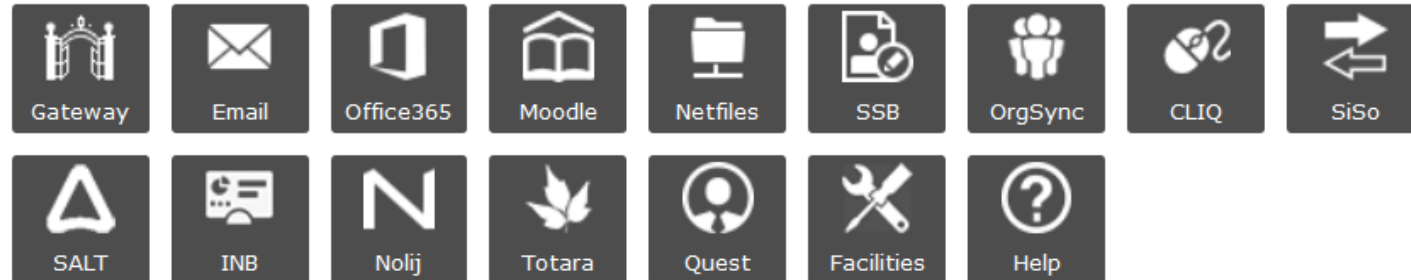
Sign into the Gateway



Gateway: Home

- My Gateway >
- Employees >
- Campus Documents >
- Faculty Meetings >
- Alumni Directory >
- FAS Directory >

APPLICATION LAUNCH PAD



PASSWORD RECOVERY CONFIGURATION

CAMPUS BALANCES

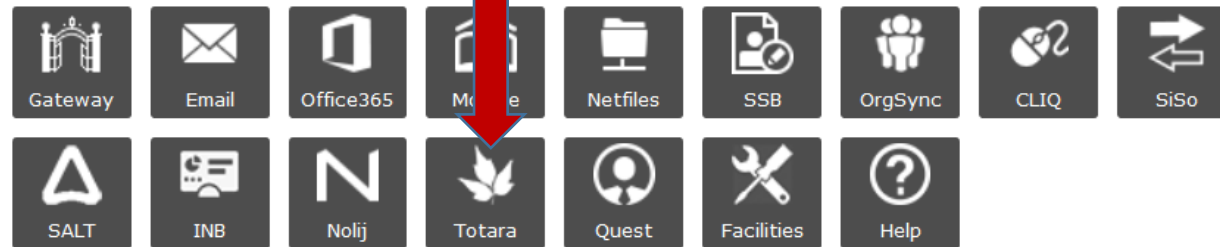
Click on “Totara”



Gateway: Home

- My Gateway >
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- Alumni Directory >
- FAS Directory >

APPLICATION LAUNCH PAD





PASSWORD RECOVERY CONFIGURATION


CAMPUS BALANCES

Go to the "Team" tab





Dashboard / Team / Team Members


TEAM  

 [View My Team](#) (2 staff)

Team Members: 2 records shown

All members of your team are shown below.

Name	Last Login	Courses Started	Courses Completed	Competencies Achieved	Extensions
 John Dickinson Plans Profile Bookings Records Appraisals Goals Required		0	0	0	0
 John Montgomery Plans Profile Bookings Records Appraisals Goals Required		0	0	0	0



Export as 


Home Dashboard Performance
Latest Appraisal
All Appraisals
Goals Team Reports Find Learning
Courses

Select Employee and click “Goals”





Dashboard / Team / Team Members


TEAM  

 [View My Team](#) (2 staff)

Team Members: 2 records shown

All members of your team are shown below.

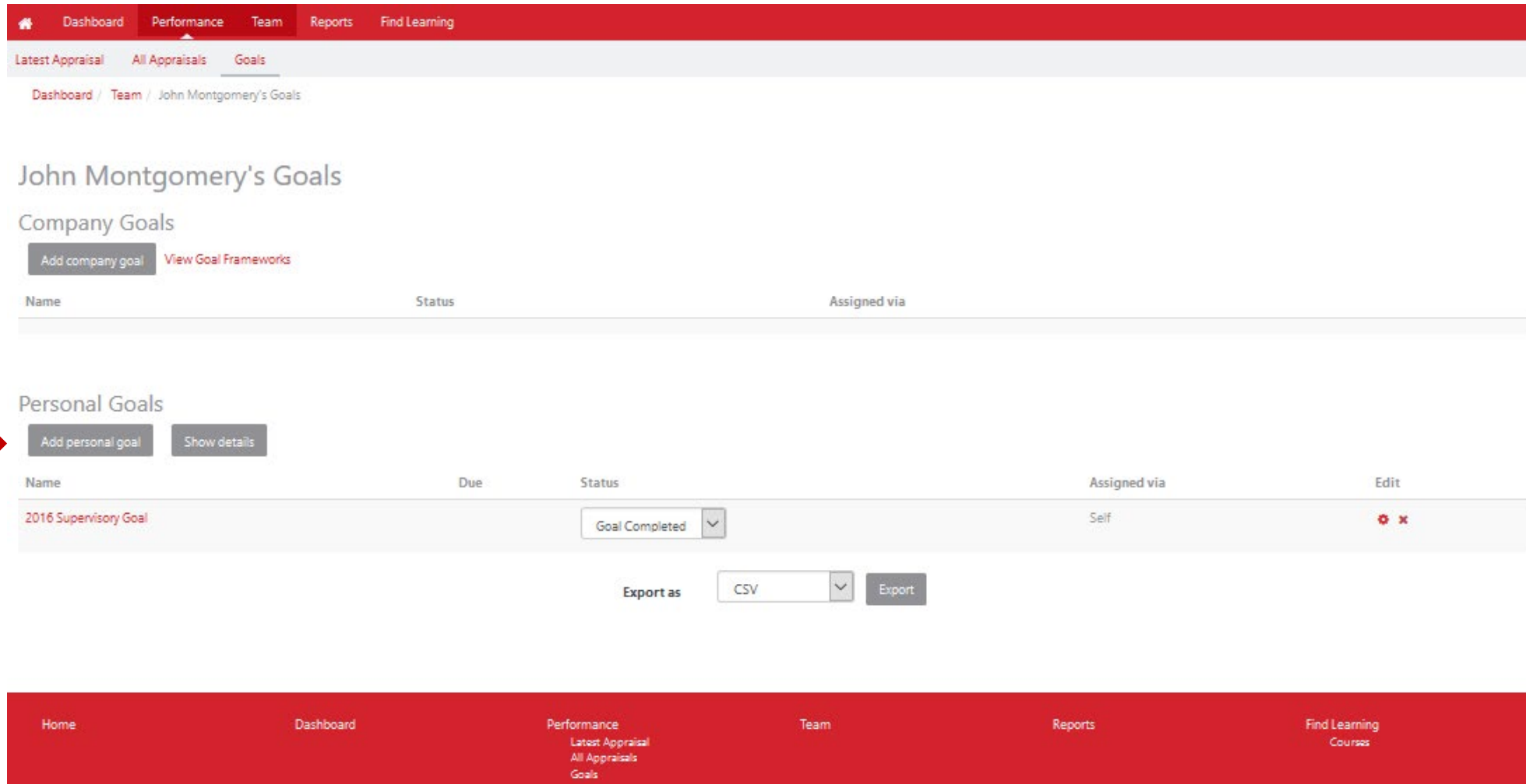
Name	Last Login	Courses Started	Courses Completed	Competencies Achieved	Extensions
 John Dickinson Plans Profile Bookings Records Appraisals Goals Required		0	0	0	0
 John Montgomery Plans Profile Bookings Records Appraisals Goals Required		0	0	0	0

Export as 

Home Dashboard Performance
Latest Appraisal
All Appraisals
Goals Team Reports Find Learning
Courses



Select “Add Personal Goal”



Dashboard Performance Team Reports Find Learning

Latest Appraisal All Appraisals Goals

Dashboard / Team / John Montgomery's Goals

John Montgomery's Goals



Company Goals

Add company goal View Goal Frameworks

Name	Status	Assigned via
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Personal Goals

Add personal goal Show details

Name	Due	Status	Assigned via	Edit
2016 Supervisory Goal		Goal Completed	Self	 

Export as CSV Export

Home Dashboard Performance Latest Appraisal All Appraisals Goals Team Reports Find Learning Courses

Creating Goals, continued

Dashboard / Performance / Team / Reports / Find Learning

Latest Appraisal / All Appraisals / Goals

Dashboard / Goals / Test Goal

Edit personal goal: Test Goal

There are required fields in this form marked *

Name*

Description ⓘ

Creating a test goal for training purposes.

Type ⓘ

Scale ⓘ

Target date ⓘ Enable

Provide a “Goal name” and brief “Description” of the goal to be worked on during the upcoming review period. We suggest beginning the goal name with the year such as 2018...

Choose the type from the drop down list “Business, Development or Wellness/Enrichment”

Creating Goals, continued

Dashboard Performance Team Reports Find Learning

Latest Appraisal All Appraisals Goals

Dashboard / Goals / Test Goal

Edit personal goal: Test Goal

There are required fields in this form marked *

Name

Description

Type

Scale

Target date Enable

Home Dashboard Performance Latest Appraisal All Appraisals Team Reports Find Learning Courses

Select "Goal Scale"
from the dropdown
list.

Click on the "Enable"
box and
then select the date you plan to
have the goal completed

Creating Goals, continued

Dashboard Performance Team Reports Find Learning

Latest Appraisal All Appraisals Goals

Dashboard / Goals / Test Goal

Edit personal goal: Test Goal

There are required fields in this form marked *

Name *

Description

Creating a test goal for training purposes.

Type Business

Scale

Target date Enable

Home Dashboard Performance Latest Appraisal All Appraisals Goals Team Reports Find Learning Courses

Final step is to click
"Save Changes"



Creating Goals, continued

The screenshot shows a web application interface for managing goals. At the top, there is a navigation bar with tabs for Dashboard, Performance, Team, Reports, and Find Learning. Below this, there are sub-tabs for Latest Appraisal, All Appraisals, and Goals. The breadcrumb trail indicates the user is in 'Dashboard / Team / John Montgomery's Goals'.

John Montgomery's Goals



Company Goals



Buttons: Add company goal, View Goal Frameworks

Name	Status	Assigned via

Personal Goals

Buttons: Add personal goal, Show details

Name	Due	Status	Assigned via	Edit
2016 Supervisory Goal		Goal Completed	Self	 
Test Goal	12/01/2017	Goal Assigned	Manager: Mary Dickinson	

Export as: CSV  

A red arrow points from the text 'Assigned via' to the 'Manager: Mary Dickinson' cell in the table.

“Assigned via”
now displays
the manager’s
name.

Creating Goals, continued

- When a manager creates a goal for an employee **ONLY** the manager is able to update/edit the information.
- If an employee is expected to update the status/description/content of a goal throughout the appraisal year then the employee must create the goal.

For assistance contact:

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