Northwestern | myHR Learn

For staff

Enter and Edit and Copy a Goal
Performance Excellence Job Aid

For staff, this job aid shows you how to **enter a new goal** , **edit a goal** , and **copy a goal** in myHR Learn.
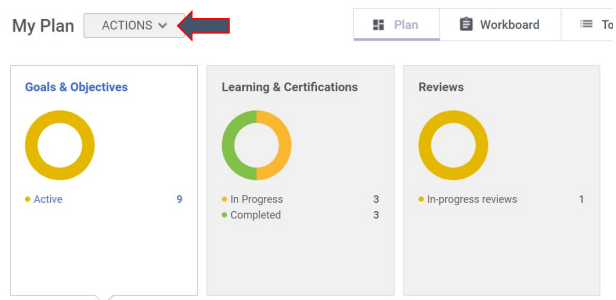
It is recommended that staff enter goals at the beginning of the performance year, and staff may also add new goals throughout the year. It is recommended to have 2-4 Active goals at any given time.

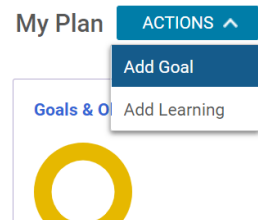**To enter a new goal,** login to myHR Learn at learn.northwestern.edu

1. In the navigation bar click on the **ME** tab

HOME	ME	GROUPS	HELP

2. Next to My**PLAN** click on the **ACTIONS** drop-down menu

My Plan ACTIONS ⌄

Goals & Objectives — Active 9

Learning & Certifications — In Progress 3, Completed 3

Reviews — In-progress reviews 1

3. Select **ADD GOAL**

My Plan ACTIONS ⌃
Add Goal
Add Learning

Goals & O...

4. A new screen will appear that says **ADD GOAL**. Complete the following fields:

Add goal

ALIGN TO PARENT GOAL

Title*
Sample Goal Title

Description
Test Goal

Category* — Performance Goals
Visible to — My manager & above
Exclude from Review — ON OFF
Start Date* — 12-Jan-2021

Due Date*
14-Jan-2021

5. **Title** of the goal (*255 character limit*). Add a SIMple title

Title *

Sample Goal Title

6. **Description** of the goal (OPTIONAL- use this space to add detail, metrics, or milestones).

Description

Description of the goal (OPTIONAL- use this space to add detail, metrics, or milestones).

7. **Category** of the goal**,** from the drop-down menu, select from the following:

- **Performance Goals** - goals tied to performance outcomes prioritized within your role, connected to job responsibilities, special projects or professional skills and/or behavior.

- **Professional Development** - goals related to growth, including gaining knowledge, practicing skills or acquiring job-related experience that may help you develop as a professional, but are not required for current performance.

Category *

Select...

Performance Goals

Professional Development

8. **Start and Due Date** - Select an appropriate start date and target date for completion

Start Date *

12-Jan-2021

Due Date *

18-Jan-2021

9. Depending on the time of year, you have the option to choose if you would like this goal added to your review. By default the "Exclude from Review" is turned off meaning goals are included in reviews.
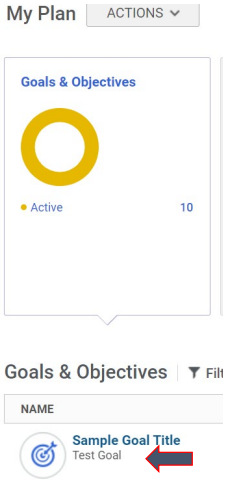
Exclude from Review

ON | OFF

10. Once you complete, scroll down past Goal Activities and Resources and Click **SAVE** . You will see a green bar that says "Goal created successfully"
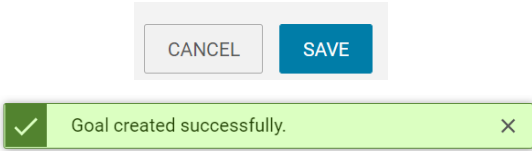
11. After clicking SAVE, go back to the **ME** tab and ensure that your new goal is visible.

For staff, this section of the job aid shows you **how to edit a goal previously entered** in myHR Learn. Goals may be edited throughout the year due to role changes, supervisor or team changes, or reprioritization.

To edit your goals: Login to myHR Learn at **learn.northwestern.edu**

1. Click the **ME** tab along the purple bar at the top of the homepage

2. Click on the Goals & Objectives Section and then click on **ACTIVE**. You can also use Filters to get to Active Goals
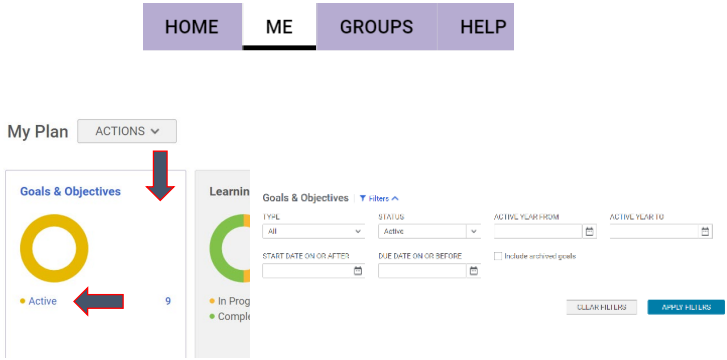
3. You now will be able to see just your active goals
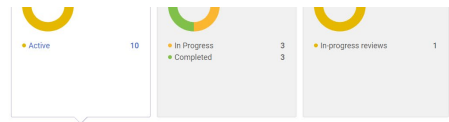
4. When you click on the blue title, your goal will now appear in a new window. In the upper-right hand corner click the blue **EDIT** button

5. Edit your goal (e.g. title, description, due date) and click the blue **SAVE** button
   Note: You will see a green box pop-up and disappear to confirm that your changes have been saved.

6. If this goal is a part of a current review, all changes made here will be reflected within the review form.

For staff, this section of the job aid shows you **how to copy a previously entered goal** in myHR Learn. This function is very useful for those that may have similar goals each year that need to be adjusted for the current performance year. Goals may be copied throughout the year due to role changes, supervisor or team changes, or reprioritization.

To copy your goals: Login to myHR Learn at **learn.northwestern.edu**

1. Click the **ME** tab along the purple bar at the top of the homepage
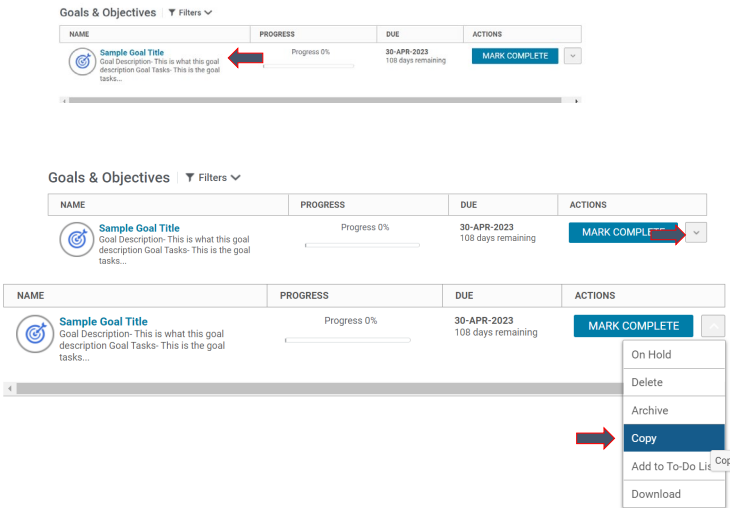
2. Click on the Goals & Objectives Section and then click on **ACTIVE f**ilter to get to Active Goals or **COMPLETED** filter to get to past Completed Goals
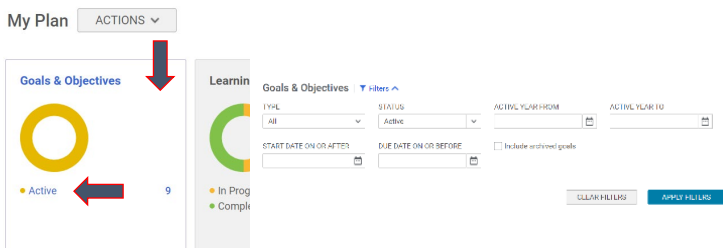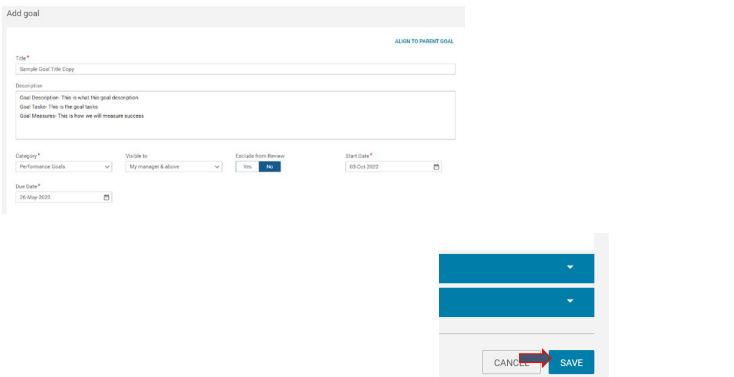
3. You now will be able to see just your active or your completed goals

4. Click the down button at the right of Actions in order to open up the goal menu and select copy

5. Once you press copy, the screen will open to a new screen, with all the same information from the original goal. Edit the goal information (e.g. title, description, due date) and click the blue **SAVE** button

Note: You will see a green box pop-up and disappear to confirm that your changes have been saved.

6. You can go back to the Me tab on the home screen and confirm that the goal is now in myHR Learn.

Ready to login? learn.northwestern.edu

Access additional tools and resources: perform.northwestern.edu

Help: For policy and process questions, contact your unit's HR Administrator. For technical support: 847-491-4357 (1-HELP) or consultant@northwestern.edu