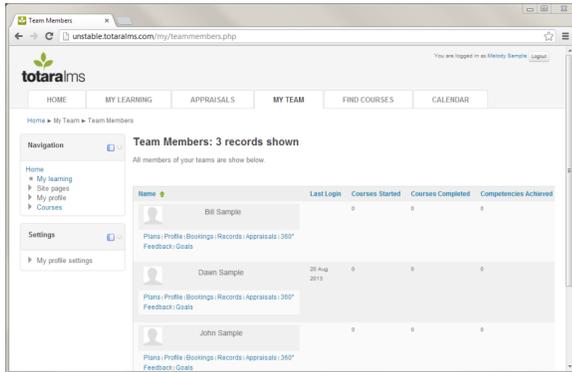# My Team Goals
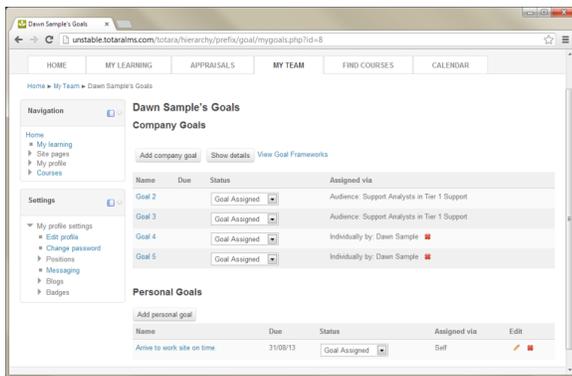
View your team members goals

Managers can access the goals of their direct reports through the *My Team* option in the main navigation.

Click on the **Goals** link under a learner's name to access their goals page.

There are two types of goals:

- Company Goals: Company goals represent the aims of the organisation as a whole. Typically an administrator or HR manager would create them. They are structured as one or more hierarchical trees, allowing for high-level goals that can be broken down into sub goals. Company goals are visible across the organisation and assigned to individuals or groups to achieve.

- Personal Goals: Personal goals represent more targeted, specific goals for an individual user to achieve. Personal goals are specific to the individual user they are created for, and do not form part of the overall sitewide hierarchy. Personal goals will be private between the user and their manager.

Permissions to add new goals for the learner will be limited based on the role permissions assigned by the site administrator.

Company Goals

Any company goals that the learner has been assigned will be displayed on their *My Goals* page which has the same layout as the goals page that the manager has access to.

Each goal will include:

- Name: The name of the goal which is also linked to display more information such as the settings and type fields related to the goal.

- Due: The due date for the goal. Note that the due date is informational only; it does not trigger reminders or notifications.

- Status: The current status of the goal. Depending on the permissions set for the manager role, this may display either the current status of the goal or a drop down box allowing the manager to update the status. The status options may differ from one goal to the next.

- Assigned via: A goal can be assigned to a learner based on multiple conditions including their position, organisation or audience membership. All of the reasons behind this goal assignment will be displayed, including assignments from previous organisations, positions, or audiences that the learner is no longer a part of.

The **Show details** button allows the manager to see more information about the goal, such as the description and any custom fields added as part of the goal type.

The **View Goal Frameworks** link gives managers view-only access to the *Goal Frameworks* page. There, the manager can view the structure of the goals, details that have been entered for them as well as review the goal scales that have been setup.

Assign a company goal to a member of your team

A goal can be assigned specifically to the individual using the **Add company goal** button.
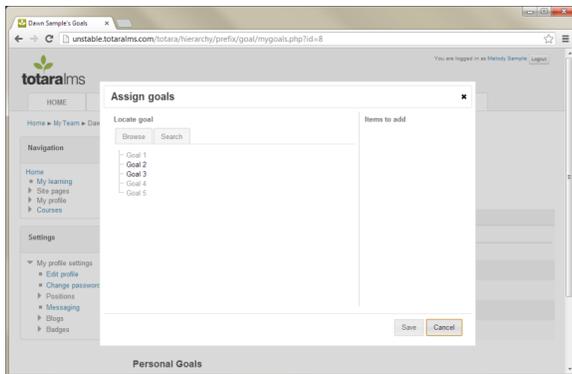
Select a goal or number of goals by clicking on each one. When the goals appear in the *Items to add* column, click the **Save** button. To remove an item from the *Items to add* column, hover the mouse over the item and click the **Delete** icon that appears.
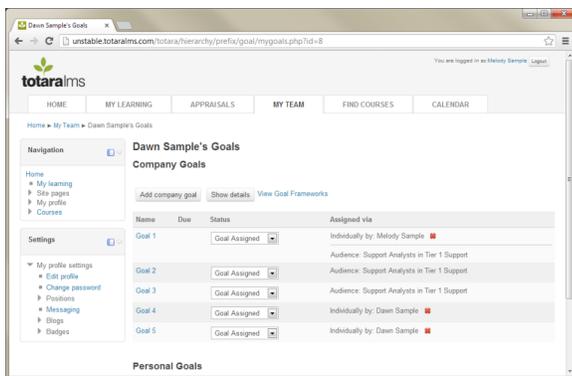
New individually assigned goals will appear with the *Assigned via* set to 'Individually by: [Name of user]'. The goal status will be set to the default value.

To update the status, click on the *Status* drop down and select the new value.
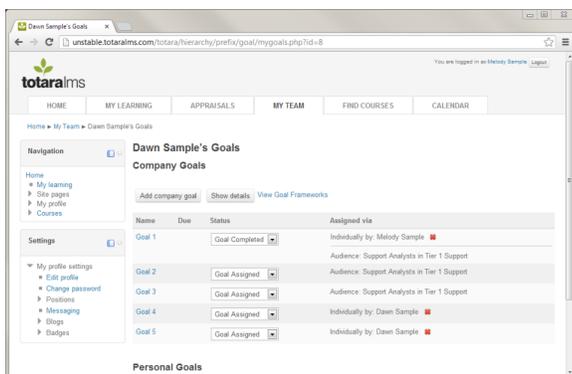
Create a personal goal for a member of your team

Personal goals are created by the learner or manager; they are specific to the individual learner and only visible to the learner and their manager as well as site administrators. Personal goals are created here rather than being selected from an existing list.

To create a personal goal for the learner, click the **Add personal goal** button.
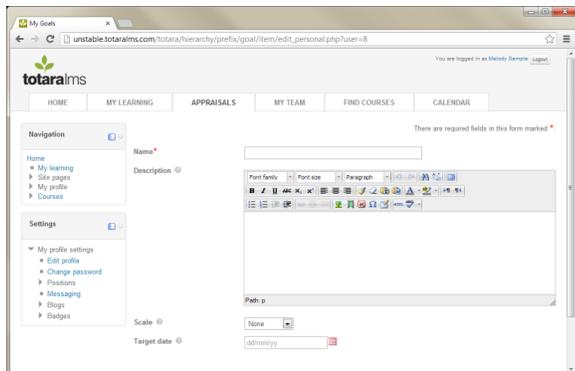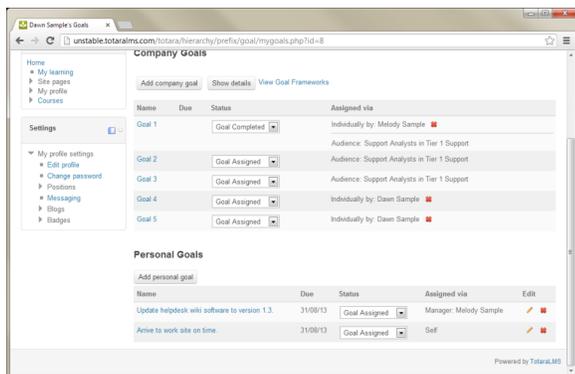

Enter the details for the goal:

- Name: Enter a title for the goal that will appear on the learner's *My Goals* page.

- Description: Enter any additional text required to describe the goal.

- Scale: Select the scale that will be used to mark the learner's progress on the goal.

- Target date: Enter the date by which the goal needs to be achieved. Note that this date does not trigger reminders or notifications; it is informational only.

Click the **Save Changes** button.

The new personal goal will appear in the **Personal Goals** section of the page.

Personal goals can be updated or deleted using the icons under the *Edit* column. Note that these will only be visible if the user has been assigned permission to take these actions.