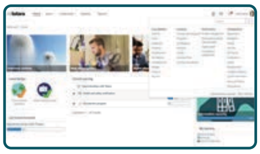
Adding and editing goals

This is a transcript of a video on the Totara Academy

Welcome to this video on adding and editing Totara goals.



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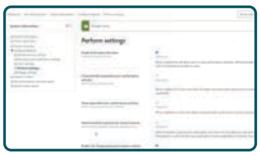
Goals are a key element of your performance management process, ensuring that everyone is clear on their aims and how they will be measured. Totara goals can be used within a performance activity or as standalone items.

In this video, we'll look at the administration side of setting up goals alongside the user experience of creating and editing your own goals.

I'm logged in as Site Administrator, and my task is to enable Totara goals on my site. To do that, I'll go to the quick access menu. **Configure features** and select **Perform settings.**There are two types of goals available in Totara - Totara goals and legacy goals. We recommend that you use Totara goals, which were released as part of Totara 18, so I'll select that option and then **Save.**



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Goals are now enabled on my site and available for other users to access. In my organisation, goals are set and updated in regular performance conversations. So now, let's set up a check-in activity which will allow people to add and update their goals.

Setting up new performance activities is covered in other videos, so let's imagine I've already started this task.

Goals are added as content to the performance activity, so I'll **Edit content elements.** I'll **Add element** and choose to **Create goal.**

I'll add some **Question text** to explain to my users what I want them to do. I'll also make this mandatory to ensure everyone has at least one goal. I'll **Save** to add this to my check-in form.

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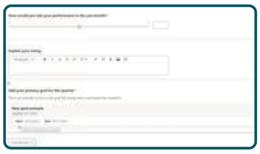

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Let’s assume I’ve now assigned this check-in to some users and activated it. I’ll log in as one of the users in the assigned audience.

Under Develop > Activities, I can see my new check-in.

And within the check-in, I can see the option to create my new goal. I’ll **Create goal.**

In this side panel, I can enter all the details of my new goal. I’ll enter my goal and an optional **Description.**

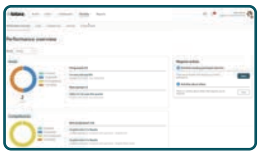
In the **Target** field, I will enter the value I need to complete this goal - in my case, 25 new sales. Remember that this could also be a percentage, or any other figure you can associate with the goal. If your goal isn’t numeric, for example, it’s either done or not done, you could consider using a percentage, where 100% indicates that the goal is done.

I’ll also enter the **Start** and **Due** dates for my goal. Now I’ve added my goal, I can **Create and view** to see my goal.

This goal will also appear in my separate **Goals** landing page, where I can see all of my goals, regardless of where they were created.

Goals also appear on my **Performance overview** page, which shows a summary of the goals, competencies and performance activities assigned to me. Unlike the **Goals** landing page, which shows all of my goals, this page shows me progress against my goals over a specific period of time.

I might want to see progress over the last six months for example.



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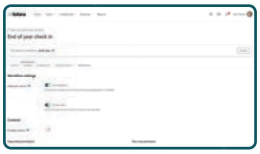
Here I can see my new goal listed as **Not started**, because I only just added it.

But of course, we want to allow users to record progress on their goals too. Let’s log back in as an administrator to do this.

Here I’ve got a follow up performance activity I know my people will complete at the end of the quarter. I’ll **Edit content elements** and this time I’ll select **Review items.** I’ll enter some **Question text** to explain what I want users to do.

The **Review type** can be used to allow users to review other items within performance activities - such as their competencies, learning or evidence. In this case, I’ll select **Totara goals.**



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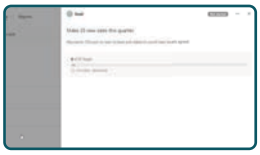
Decide who will select the goals to be reviewed.

You can also decide whether goals can be updated within the performance activity, or only viewed here. I'll say I want the individual to be able to update progress directly within the performance activity and that the **Subject** of the goal should be the person to do that.

I'm happy with my new item so I'll **Save** it.

Let's log back in as my learner user, and imagine that I have made some progress on my goal and want to update it. I can do this from the **Performance overview** page which takes me back to the goal on the **Goals** landing page.



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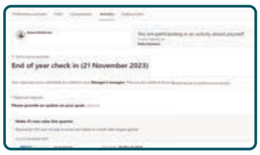
To update progress from here, I'll use the three dots to **Update progress.** I can see the target I added. I've made 10 new sales, so I can add them here as progress towards my target value.

And because I've started progress, I'll also change the **Status** to 'In progress'. And then **Update.**

Let's imagine that the next time I review this goal is within a performance conversation with my Manager. I can do that in exactly the same way from within the performance activity we've set up.

First, I need to add the goal I want to review. I can see my current progress, and will **Confirm selection.** I can now see the option to **Update progress** on this goal.

As before, I can add Progress against my target and alter the **Status** if I want to then **Update.**



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This has automatically updated the goal in other views on the site too, such as the **Goals** landing page.

Note that if you've added a goal in error, you can also **Delete** it from this page. Once a goal is deleted, it will be removed from this list.

If the goal was added or reviewed as part of a performance activity, the title and description of the goal will still be visible as a snapshot within that activity.

So that's enabling Totara goals, adding them to performance activities, and the user experience of creating and updating goals in Totara. What will your first goal be?

End