



## ATLAS Goals Quick Reference Guide Supervisor Goals

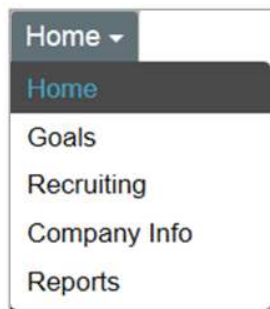
### INTRODUCTION

Supervisors and Employees work together to ensure goals are in place through a collaborative process of meetings and communications. The ATLAS Goals Quick Reference Guide provides instruction for managing your direct reports' goal plan in the ATLAS system.

### NAVIGATION

From AGI, via the TOOLS & RESOURCES menu under TOOLS, select ATLAS.

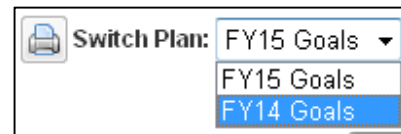
From the landing page, under the **Home** menu, select **Goals**.



Or select Goals, under ATLAS Goals in the Performance & Goals tile.



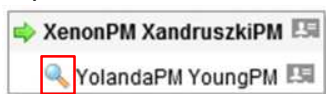
The Goals landing page will automatically default to the FY15 goal plan. In order to switch back to the FY14 goal plan, go to **Switch Plan** in the upper right corner and select **FY14 Goals**.



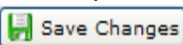
### DIRECT REPORT GOAL PLAN

#### CREATE A GOAL PLAN FOR A DIRECT REPORT

1. In the Employee Hierarchy area, click  next to the desired direct report to access his or her goal plan.



2. Click  on the right side of the screen.
3. Add goal information as needed or required:
  - a. **Goal Name**
  - b. **Weight** (goal weights must total 100%)
  - c. **Start** (default date can be changed)
  - d. **Due** (default date can be changed)

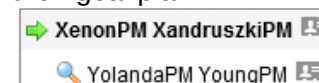
4. Click . **Save often!**

**NOTE:** All employees must have at least one goal.

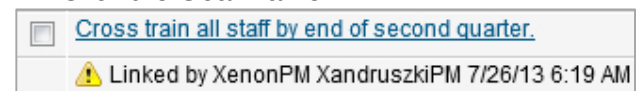
#### EDITING GOALS

To **Edit a Goal** for a direct report:

1. In the Employee Hierarchy area, click  next to the desired direct report in order to access their goal plan.

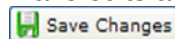


2. Click the Goal Name link.



A pop-up window opens to the goal details for editing.

3. Make edits as necessary and then click



#### DELETING GOALS



## ATLAS Goals Quick Reference Guide Supervisor Goals

To **Delete a Goal** for a Direct Report:

1. Navigate to the **goal plan** of the desired direct report.
2. Select the **checkbox** for all goals you wish to delete.

|                                     |                                                                 |
|-------------------------------------|-----------------------------------------------------------------|
| <input checked="" type="checkbox"/> | <a href="#">Cross train all staff by end of second quarter.</a> |
|-------------------------------------|-----------------------------------------------------------------|

3. Click Delete Selected Goal

### CASCADE GOALS

To **Cascade Goals** to your direct reports:

1. Select all goals you wish to cascade.

| Goal Name                                                                                           |
|-----------------------------------------------------------------------------------------------------|
| <input checked="" type="checkbox"/> <a href="#">Cross train all staff by end of second quarter.</a> |

2. Click Cascade Selected Goal  
Select the desired **direct reports**.

|                                     |                      |
|-------------------------------------|----------------------|
| <input type="checkbox"/>            | XenonPM XandruszkiPM |
| <input checked="" type="checkbox"/> | YolandaPM YoungPM    |
| <input type="checkbox"/>            | ZacharyPM ZubovPM    |

3. Click Next
4. Edit **fields** in the goal as needed.
5. Click Cascade

To View a **Cascaded Goal**:

1. Click to open the Display Options area.

|                           |
|---------------------------|
|                           |
| Displaying 1–2 of 2 Goals |

2. Click **Aligned Down** and **Update**.

|                                                                                                                                                                                                        |
|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <input type="checkbox"/> Display Options                                                                                                                                                               |
| <input checked="" type="checkbox"/> Aligned Up <input checked="" type="checkbox"/> Aligned Down <input type="checkbox"/> Alerts <input type="checkbox"/> Last Modified <input type="checkbox"/> Weight |
| <input type="button" value="Update"/>                                                                                                                                                                  |

The goal will display in the manager's goal plan next to the gold down arrow.

| Goal Name                                                                                |
|------------------------------------------------------------------------------------------|
| <input type="checkbox"/> <a href="#">Cross train all staff by end of second quarter.</a> |
| [YolandaPM YoungPM] Cross train all staff by end of second quarter.                      |

Or, cascaded views can be seen in the direct report's goal plan.

1. In the Employee Hierarchy area, click next to the desired direct report.

|                      |
|----------------------|
| XenonPM XandruszkiPM |
| YolandaPM YoungPM    |

2. Cascaded goals are listed as linked under the goal name.

|                          |                                                                 |
|--------------------------|-----------------------------------------------------------------|
| <input type="checkbox"/> | <a href="#">Cross train all staff by end of second quarter.</a> |
|                          | Linked by XenonPM XandruszkiPM 7/26/13 6:19 AM                  |

### APPROVING GOAL PLAN

To **Approve a Goal** for a Direct Report:

1. In the Employee Hierarchy area, click next to the desired direct report in order to access their goal plan.

|                      |
|----------------------|
| XenonPM XandruszkiPM |
| YolandaPM YoungPM    |

2. After reviewing the goals and making edits, select the **Click to Approve and Lock** link at the top of the goal plan.

#### FY14 Goals for YolandaPM YoungPM

(Goal Plan Status: Unapproved) [Click to Approve and Lock](#)

3. The goal plan is now locked. To edit goals, select the **Click to Unlock and Edit** link that has replaced the **Approve and Lock** link.

### ACTION COLUMN

The **Action column** allows you to access information about the goals, as well as reorder goals in your goal plan.

### Information

The icon will display the goal's information page.

#### Detail View of Goal for YolandaPM YoungPM

[Return to Goal Plan for YolandaPM YoungPM](#)

Aligned Up [XenonPM XandruszkiPM] [Cross train all staff by end of second quarter.](#)

|            |                                                 |
|------------|-------------------------------------------------|
| Goal Name: | Cross train all staff by end of second quarter. |
| Weight:    | 50.0%                                           |
| Start:     | 04/01/2013                                      |
| Due:       | 03/31/2014                                      |

| Audit History: | Date       | Action    | User                 |
|----------------|------------|-----------|----------------------|
|                | 07/26/2013 | Created   | XenonPM XandruszkiPM |
|                |            | displayed |                      |

### Reorder Goals



## ATLAS Goals Quick Reference Guide Supervisor Goals

There are blue up and down arrows in the action column next to each of the goals.



Pressing the arrows will rearrange how the goals are displayed on the goal page.

### COPYING GOALS FROM PREVIOUS YEARS

To copy a goal from FY14:

1. Click Copy From Other Goal Plan
2. Click the bubble to select FY14 Goals

Step 1. Select Goal Plan

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

Goal P

FY14 Goals

3. Click
4. Select the goal to copy to FY15 goals by checking the box to the left of the desired goal

Step 2. Select Goal

2 Step 2 of 2. Select Goal

Goal Name

☒ This is a test

5. Then click

### ADDING COMMENTS

For FY15 goal plans, employees and supervisors will be able to add comments within each goal throughout the year. To add comments:

1. Click on the desired goal to edit
2. Enter Comments in the section at the bottom of the goal
3. Click
4. The comments will display on the Goals landing page in a column to the right of the goal. Each comment will display the date it was entered as well as who entered it.

| Comments   |                     |                                 |
|------------|---------------------|---------------------------------|
| Date       | By                  | Comment                         |
| 03/14/2014 | Tessa M Cappuccio   | Can I still add comments?       |
| 03/14/2014 | Yvonne Juliana Abel | I am adding a comment as Yvonne |
| 03/14/2014 | Tessa M Cappuccio   | Comments from me                |