



Track Progress Toward Goals

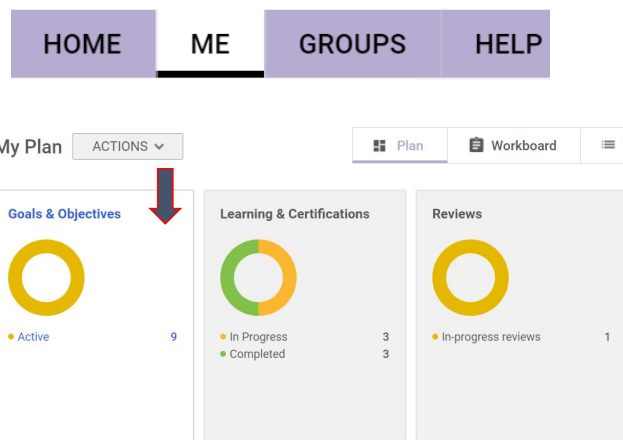
Performance Excellence Job Aid

for staff

This job aid is for staff to learn how to track progress toward goals in performance excellence. While tracking progress on your goals is not universally required, it may be expected in your area. Additionally, you may choose to utilize this functionality to stay motivated and engaged, manage your work, and document your performance.

Login to myHR Learn at learn.northwestern.edu

1. Click the **ME** tab along the purple bar at the top of the homepage
1. Click on the Goals & Objectives Section and then click on **ACTIVE**. You can also use Filters to get to Active Goals



2. You can track progress by adding comments that you've finished a milestone or task. Scroll down the page to the Goals section to see your list of goals. From here you have two options:

- a. Option 1: Stay on this page and slide the percentage bar next to a goal title to indicate how much progress has been made. A pop-up will appear and ask for comments related to your progress (required). Within the pop-up, enter your comments and press **SAVE**.

Goals & Objectives Filters

NAME	PROGRESS	DUE	ACTIONS
Sample Goal Title Test Goal	Progress 44%	17-JAN-2021 3 days remaining	MARK COMPLETE
Sample Goal Title 2 Description of the goal (OPTIONAL- use this space to add detail, metrics, or milestones).	Progress 0%	18-JAN-2021 4 days remaining	MARK COMPLETE

Goals & Objectives Filters

NAME	PROGRESS
Sample Goal Title Test Goal	Progress 44%

56 % Complete 14-Jan-2021

Comments *
insert comment in text box

Progress history CANCEL SAVE

PROGRESS	COMMENT	DATE
44 %	44% completed	12-JAN-2021
0 %	Created	11-JAN-2021

- b. Option 2: Click on the title of a goal, and a full page version of the goal and details will open in a new window. If you scroll down you can update the progress completion and enter comments and press **SAVE**.

The screenshot shows the 'Goals & Objectives' interface. At the top, there's a 'NAME' field containing 'Sample Goal Title'. Below it is a goal icon and the text 'Sample Goal Title' with 'Test Goal' underneath. A red arrow points to the goal title. To the right, there's a 'Sample Goal Title' header, a 'Status' dropdown set to 'Active', and 'Assigned By: Eric 1'. Below the goal title, there's an 'Update progress' section with a progress bar at 56% and a 'SAVE' button. A text box for 'enter comments in text box' is also visible.

- 3. The progress and comments are now stored within this goal. If this goal is already included within your review, the progress will be reflected there automatically and you may choose to include comments as well (at your discretion). See year-end job aids for guidance on adding comments to your review.

This screenshot shows the 'Update progress' section. It features a progress bar at 56% and a 'SAVE' button. Below the progress bar is a text box for 'Enter comments (required)'. To the right, there's a comment history section with two entries: '14-JAN-2021 2:56 PM' with '56% Complete' and 'This is an update on this goal', and '14-JAN-2021 2:48 PM' with '56% Complete' and 'enter comments in text box'.



Idea: during a check-in, navigate to your list of goals via the ME tab, and discuss progress and next steps, taking notes directly within each goal.

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