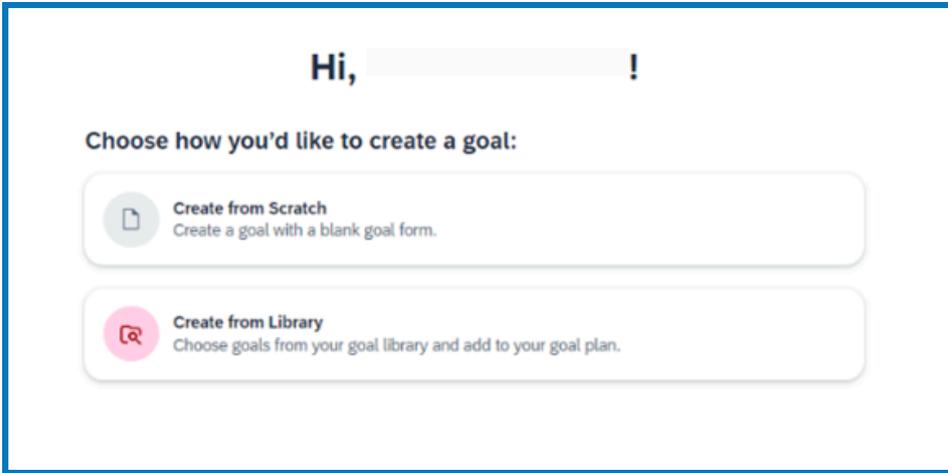




Supervisors have 2 methods for creating goals for their employees.



## CREATE FROM SCRATCH

This option allows you to write your own goal and metric.

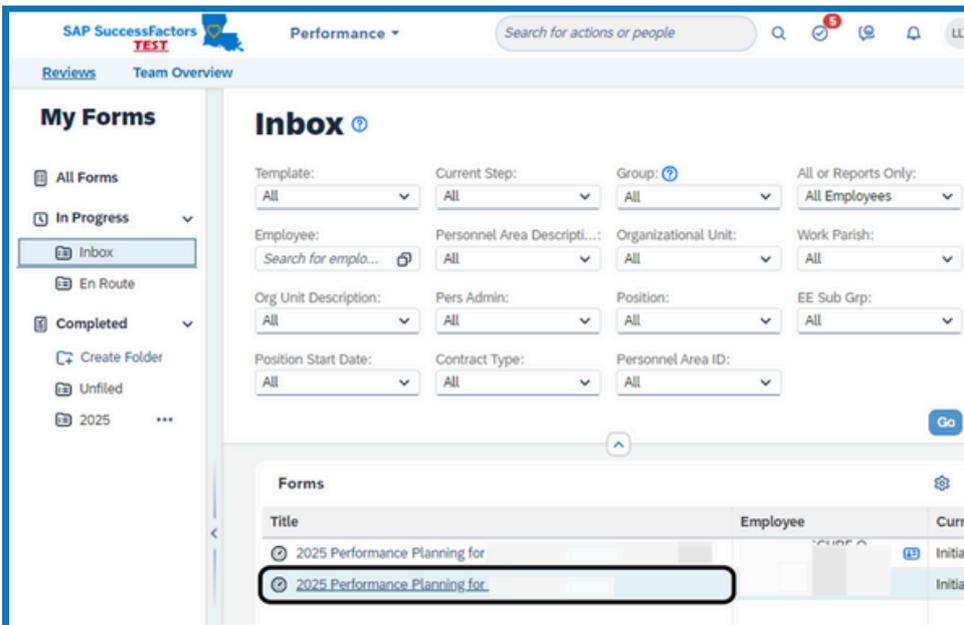
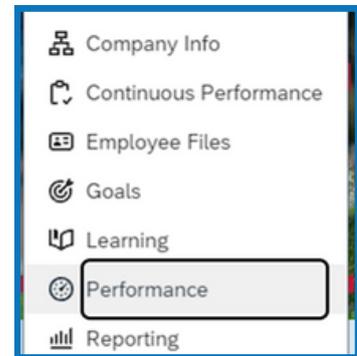
## CREATE FROM LIBRARY

This option allows you to select a goal with metrics from a role-based library.

While goals may either be added through the Goal Plan or directly to the CPM Planning Form, it is recommended that you add them directly to the form. Regardless of the method used, the goal will appear simultaneously in both locations.

## 1 NAVIGATE TO THE FORM

- Click on “Performance” in the Home menu.
- Open the correct CPM form in your inbox.



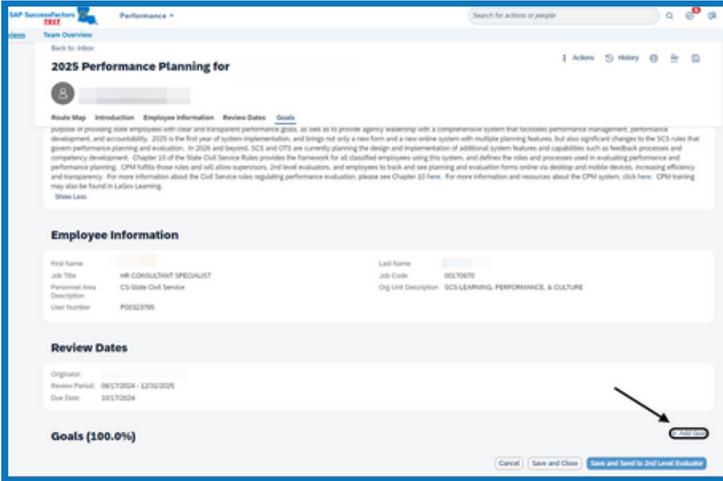


This option allows you to write your own goal and metric.

## 1

### ADD GOAL

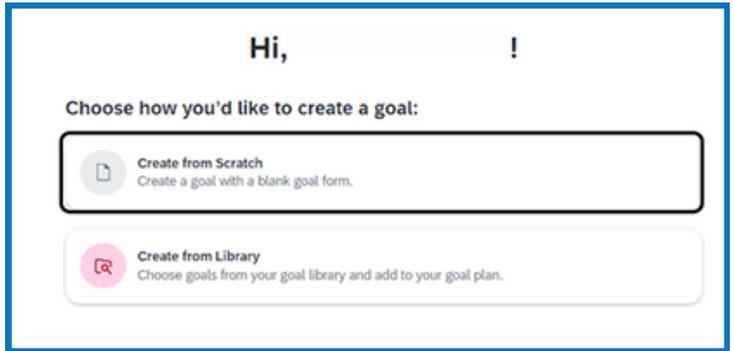
- Click "+" to add a goal.
- Click "Create"



## 2

### CREATE FROM SCRATCH

Click on "Create from Scratch" to begin.



## 3

### ADD GOAL DETAILS

These fields are required.

#### Add "Goal Name"

\*Goal name is required.

#### Add "Metric"

\*Metric is required. This explains how the goal will be measured.

#### Change "Start/Due Date"

#### Add "Weight" of Goal

\*The total weight must equal 100%.

#### Change "Type"

#### Change "Category"

**Create Performance Goal**

Goal Name\*:  (500 characters left Legal Scan)

How will it be measured?\*:  (4000 characters left Legal Scan)

Start Date\*: Jun 17, 2024

Due Date\*: Dec 31, 2025

Weight\*: 0 %

Type: Department

Category\*: Performance

## 4

### REVIEW & SAVE

- Review the goal.
- Click "Save."

! Additional details about each option can be found in the CPM Planning Process Manual for Supervisors.

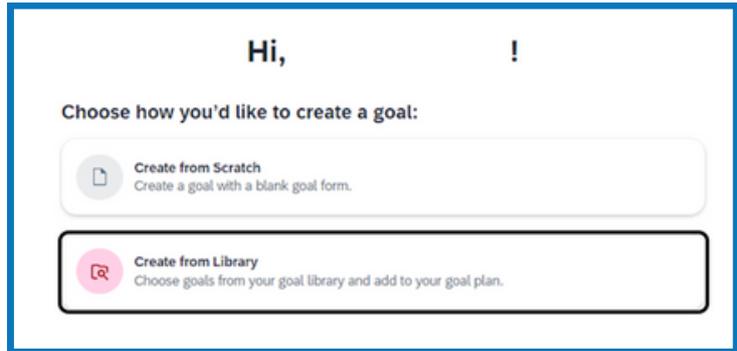
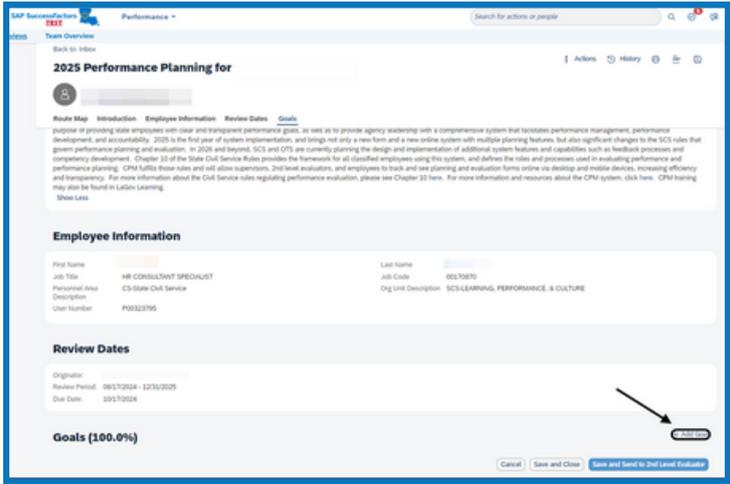
This option allows you select a goal from an organized library with suggested metrics.

**1 ADD GOAL**

- Click "+" to add a goal.
- Click "Create"

**2 CREATE FROM LIBRARY**

Click on "Create from Library" to begin.



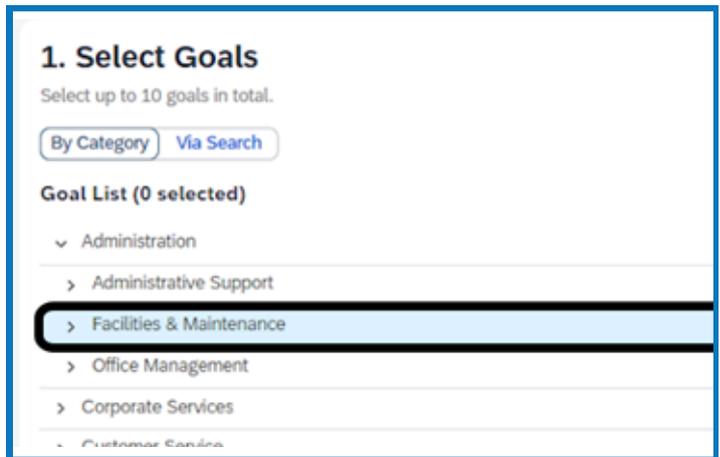
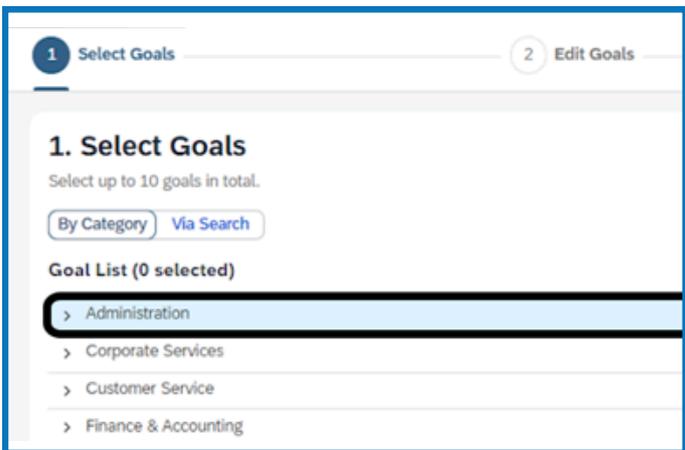
## Option 1: Browse Goals "By Category"

**3 SELECT CATEGORY**

Click on the > next to the appropriate category.

**4 SELECT SUB-CATEGORY**

Click on the > next to appropriate sub category.

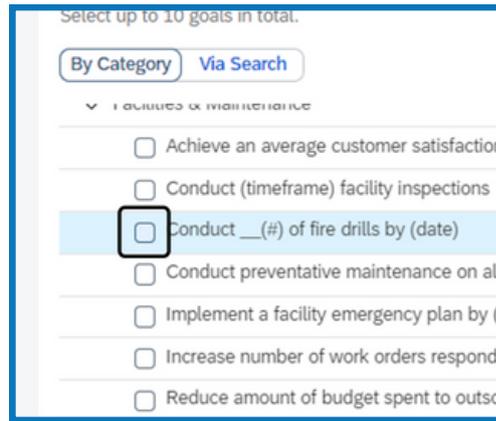




5

## ADD SELECTED GOAL

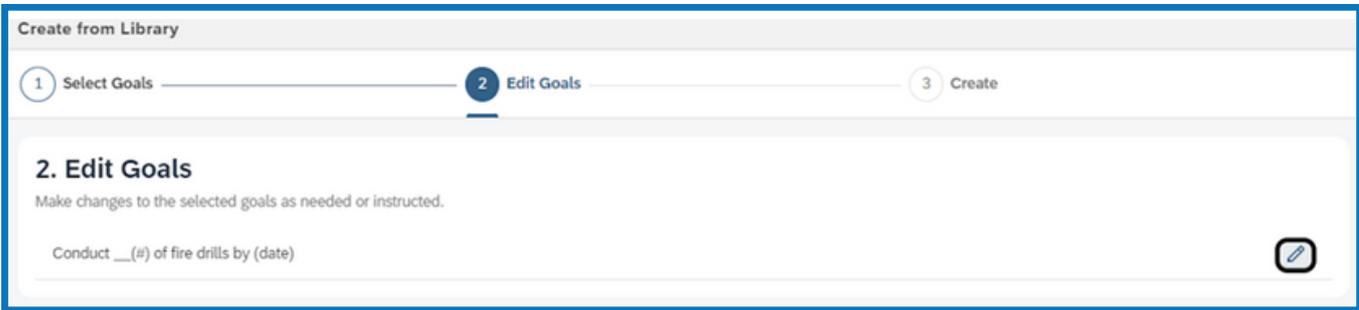
- Click the box next to the goal you would like to add.
- Click "Save."



6

## OPEN EDIT OPTIONS

Click on the pencil icon.



7

## ADD GOAL DETAILS

These fields are required.

### Add "Goal Name"

\*Goal name is required.

### Add "Metric"

\*Metric is required. This explains how the goal will be measured.

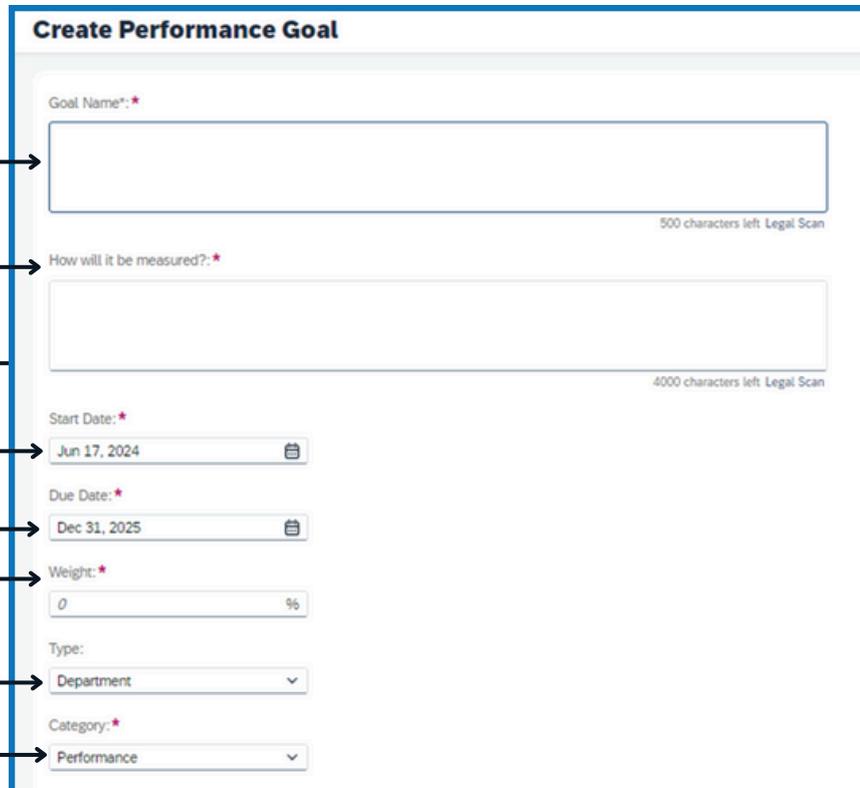
### Change "Start/Due Date"

### Add "Weight" of Goal

\*The total weight must equal 100%.

### Change "Type"

### Change "Category"



8

## REVIEW & ADD

- Review the goal.
- Click "NEXT."
- Click "NEXT" again.
- Click "SAVE."

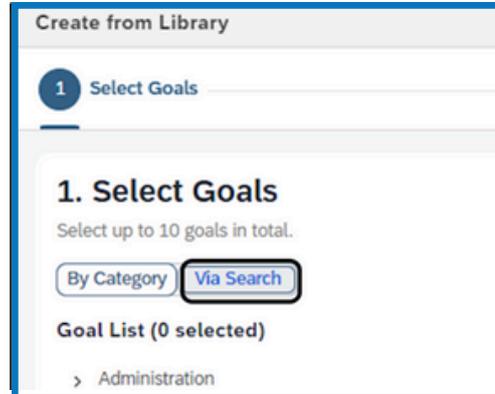
Additional details about each option can be found in the CPM Planning Process Manual for Supervisors.

## Option 2: Browse Goals “Via Search”

1

### SELECT SEARCH

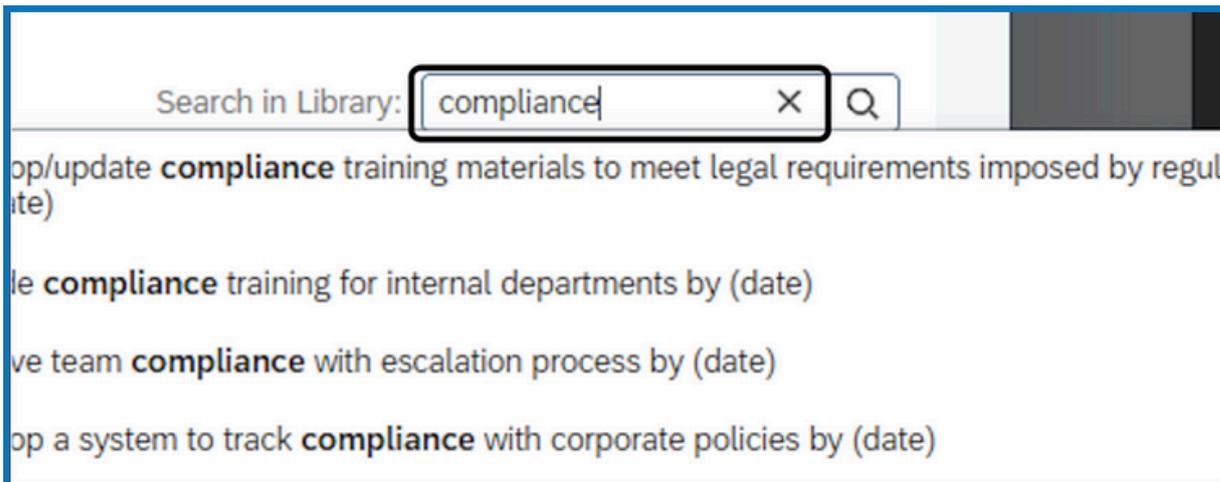
Click on “Via Search” to begin.



2

### SEARCH

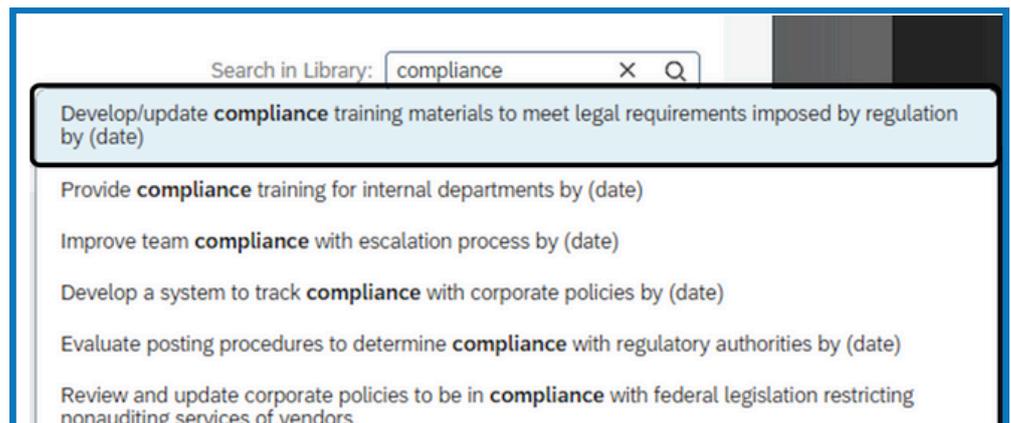
- Type in your search term.
- A list of goals with your search term will appear.



3

### SELECT GOAL

- Click on the goal you would like to add.
- Click “NEXT.”





## 4

### OPEN EDIT OPTIONS

Click on the pencil icon.

Create from Library

1 Select Goals — 2 Edit Goals — 3 Create

**2. Edit Goals**  
Make changes to the selected goals as needed or instructed.

Conduct \_\_(#) of fire drills by (date)

## 5

### EDIT GOAL DETAILS

These fields are required.

**Add "Goal Name"**

\*Goal name is required.

**Add "Metric"**

\*Metric is required. This explains how the goal will be measured.

**Change "Start/Due Date"**

**Add "Weight" of Goal**

\*The total weight must equal 100%.

**Change "Type"**

**Change "Category"**

**Create Performance Goal**

Goal Name: \*  500 characters left. Legal Scan

How will it be measured?: \*  4000 characters left. Legal Scan

Start Date: \*  Calendar icon

Due Date: \*  Calendar icon

Weight: \*  %

Type:  Dropdown arrow

Category: \*  Dropdown arrow

## 6

### REVIEW & ADD

- Review the goal.
- Click "NEXT."
- Click "NEXT" again.
- Click "SAVE."

**!** Additional details about each option can be found in the CPM Planning Process Manual for Supervisors.

