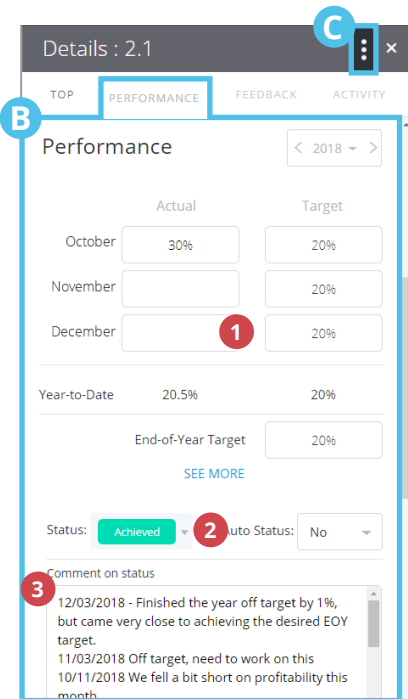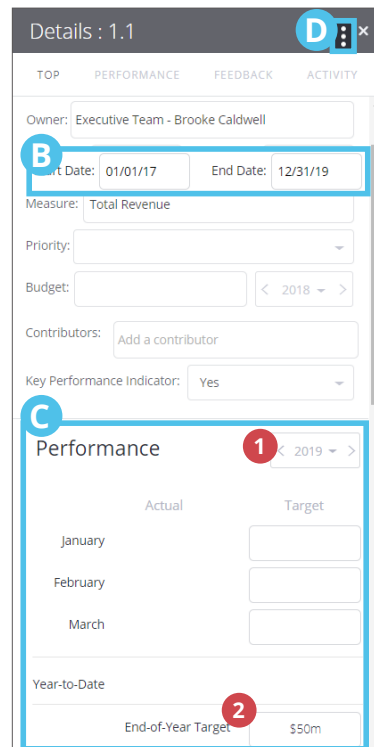## 1 Close Out & Carry Forward Corporate Goals (x.x)

Navigate to the Goal Cascade page in the Goals navigation. Review your annual corporate goals and decide which you want to Close Out and which you need to Carry Forward and extend into the next planning year.

Step 1A: Close Out Your Goals   AND

A) Select the annual goal you would like to close out. Click on the goal to open the "Details" tray.

B) Click the "Performance" tab in the "Details" tray. Then, provide an update to the last period of actuals:

1. Update your actuals.
2. Update the status.
3. Add a date-stamped comment.

C) In the "Top" section, click the 3-dot menu. Select "Request Close/Extend Child Goals" to have owners of supporting children goals carry their goals forward into next planning year.
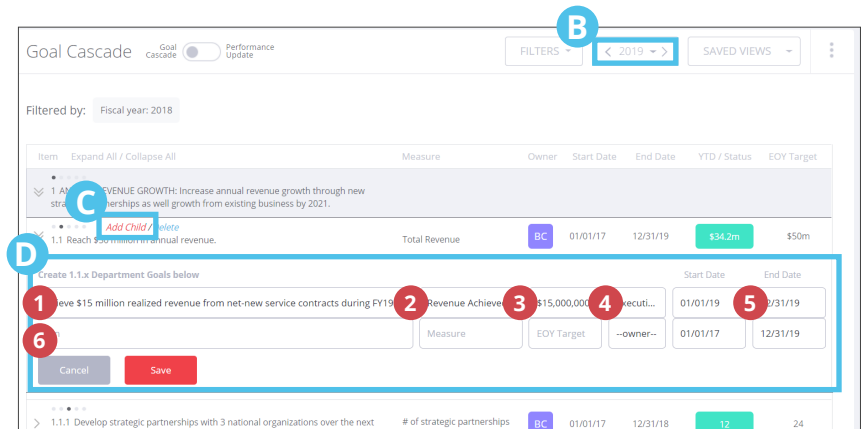
Step 1B: Carry Foward Your Goals

A) Select the annual goal you would like to carry forward. Click on the goal to open the "Details" tray.

B) In the "Top" section, change the end date to the appropriate time in the next planning year.

C) Click the "Performance" tab in the top navigation.

1. Select the next planning year.
2. Input a new EOY target.

D) In the "Top" section, click the 3-dot menu. Select "Request Close/Extend Child Goals" to have owners of supporting children goals carry their goals forward into the next planning year.
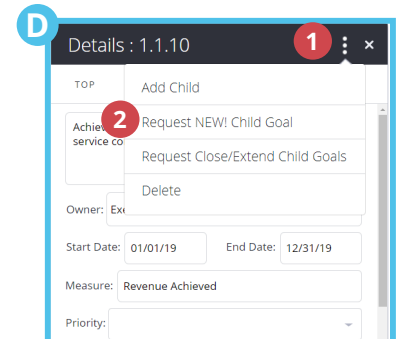

2 Create New Goals & Actions

A) Navigate to the Goal Cascade page in the Goals section of the left-hand navigation.

B) Filter the page to show 2019 goals,

C) To add a goal, hover over the goal description and select "Add a Child".

C) Tab through the fields to create the new goal:

1. Type the goal description.
2. Input the measure.
3. Input the EOY target.
4. Assign the owner.
5. Select start- and end-dates.
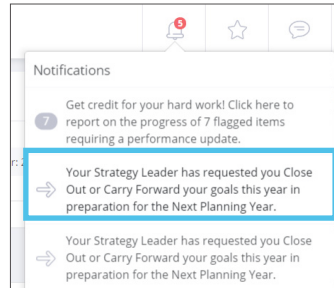6. Tab through to the next line to add additional children goals to the parent.

D) Once you've created your new goal, click on it to open the "Details" tray.

1. In the "Top" section, click the 3-dot menu.

2. Select "Request NEW! Child Goals" to notify team members to create new supporting children goals for the next planning year.

1 Close Out & Carry Forward Your Goals

Open the notifications drop down from the icon in the top right-hand navigation. Click on the notification for a goal you've been notified to close out or extend in the new year. This will open the Close Out Goals page that will be populated with goals you need to close out or carry forward.

Step 1A: Close Out Your Goals

A) As directed by your strategy leader, close out your goals by completing the following steps:

1. To close out the goal, select the Close Out check box.
3. In the modal, type the result for the last period, select a status, and add a date-stamped comment.
4. Continue this process until all goals are closed out.

Step 1B: Carry Forward Your Goals

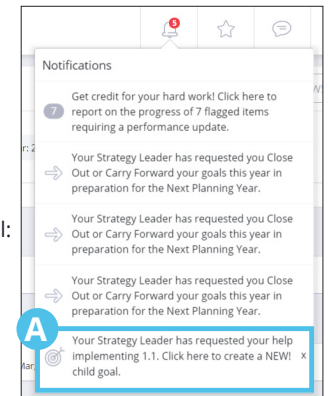**B)** As directed by your strategy leader, carry forward your goals by completing the following steps:

1. If the parent goal has an end-date during 2019, you need to carry forward the child goal you own.
2. To cary forward the goal, select the Carry Forward check box and then select Yes. If you do not want to carry forward the goal, select No to close out the goal.
3. If you are extending the goal, the next modal will prompt you to create a new end-date, add a new end-of-year target, and select if you would like performance to be carried forward into the next planning year or start the new year from scratch.
4. Continue this process for all goals until all goals are carried forward or marked as not extending.

2 Create New Goals & Actions

A) Open the notifications drop down from the icon in the top right-hand navigation. Click on the notification for a goal you've been notified to add a "New! Supporting Child Goal" to. This will open the field to add a new supporting goal.

B) Filter the page to show 2019 goals,

C) Tab through the fields to create the new goal:

1. Type the goal description.
2. Input the measure.
3. Input the EOY target.
4. Assign the owner.
5. Select start- and end-dates.
6. Tab through to the next line to add additional children goals to the parent.

D) Once you've created your new goal, click on it to open the "Details" tray.

1. In the "Top" section, click the 3-dot menu.
2. Select "Request NEW! Child Goals" to notify team members to create new supporting children goals for the next planning year.