

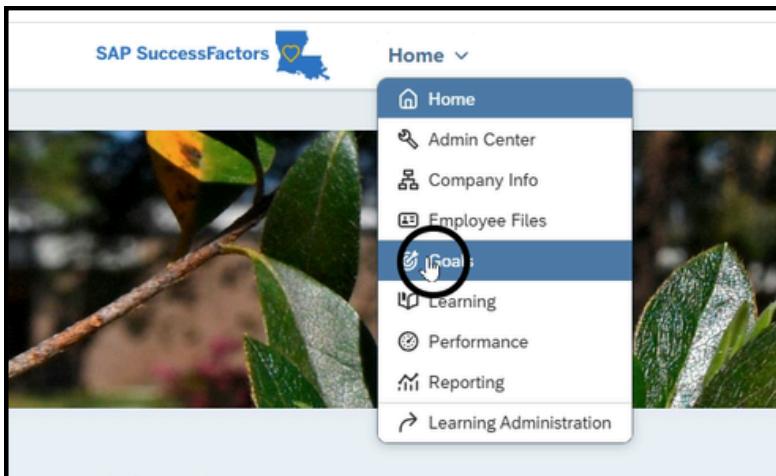


While goals may either be added through the Goal Plan or directly to the CPM Planning Form, you can only copy goals through the Goal Plan.

## NAVIGATE TO THE GOAL PLAN

1

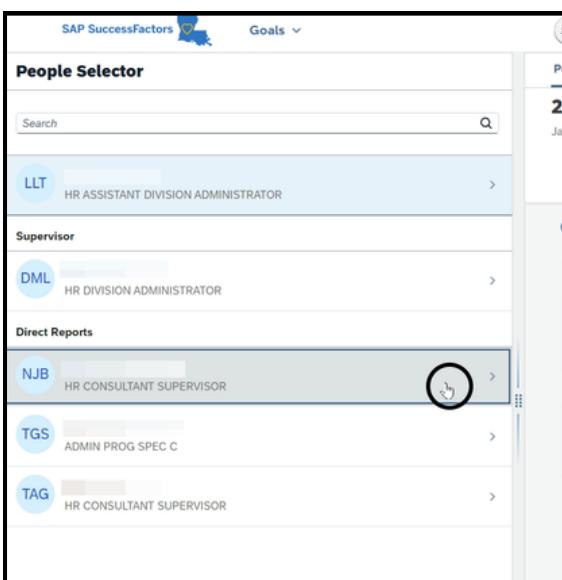
Click "Goals" in the dropdown "Home" menu.



## SELECT THE EMPLOYEE

2

Click on the employee whose Goal Plan you want to copy.

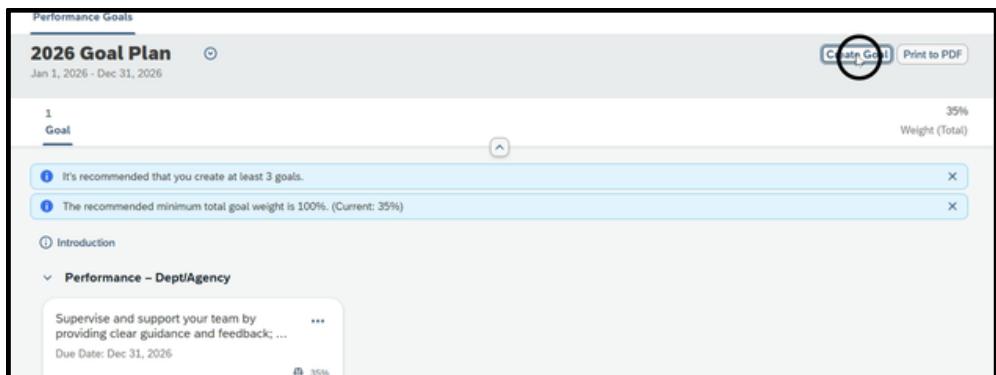


You cannot copy a goal from one employee's goal plan to a different employee.

## CREATE GOAL

3

Click "Create Goal."

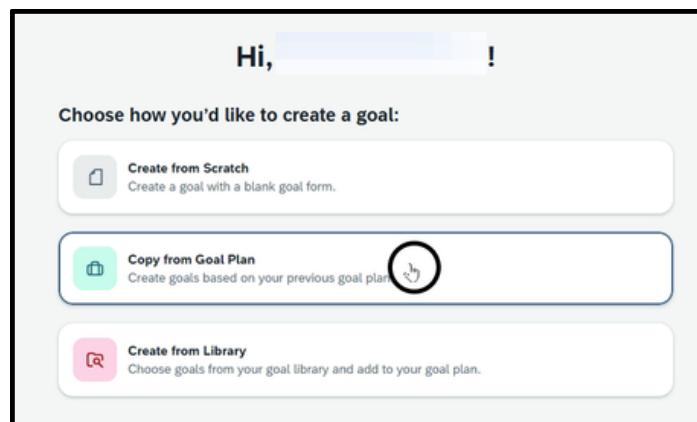




4

## SELECT COPY

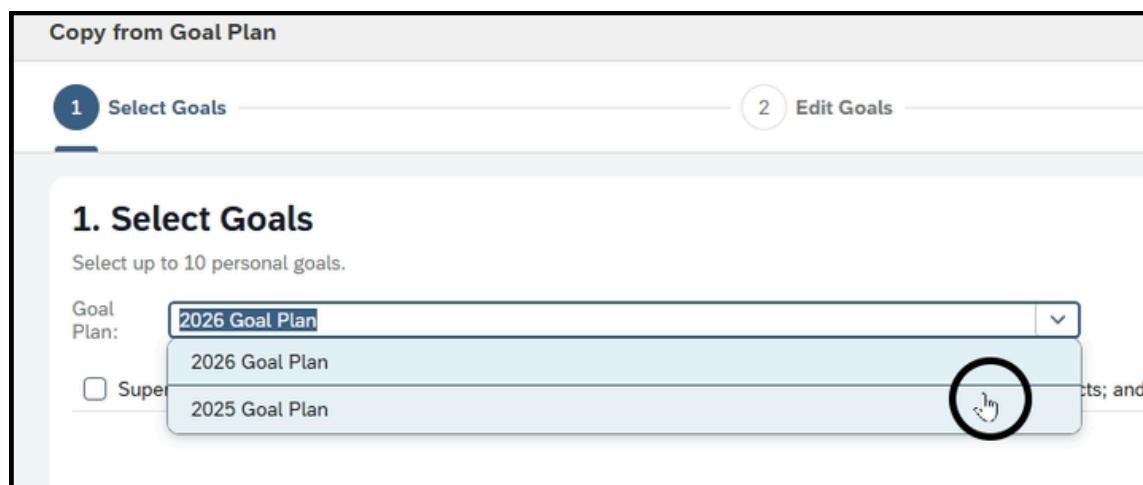
Select “Copy from Goal Plan.”



5

## SELECT GOAL PLAN

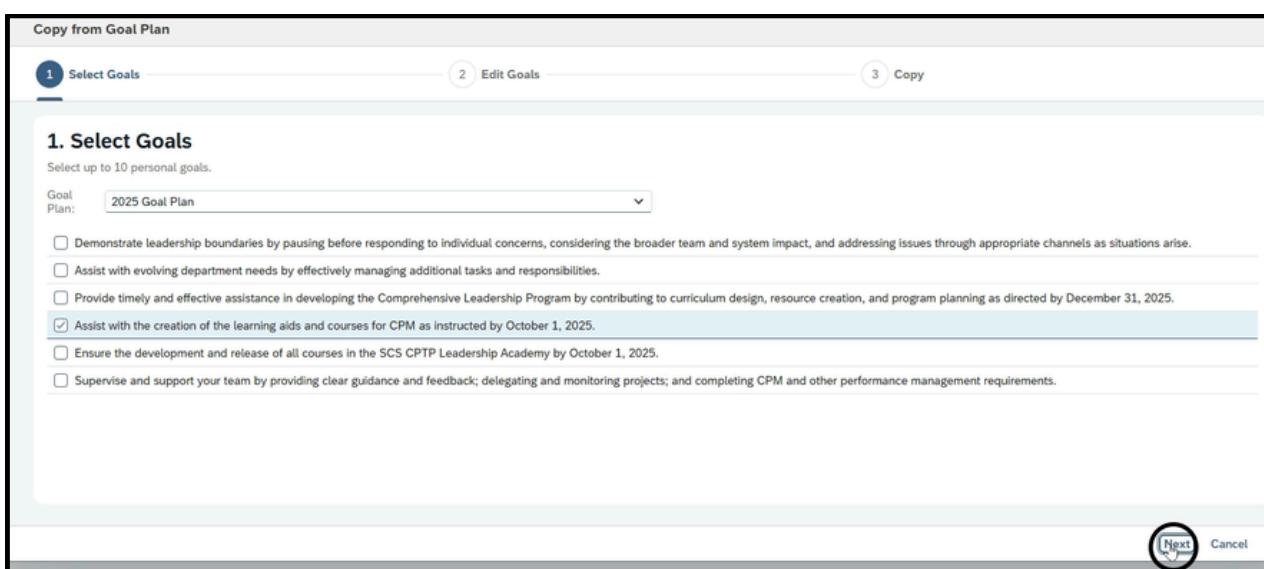
Use the dropdown to select the goal plan from which you want to copy.



6

## SELECT GOALS

- Select the goals you would like to copy.
- Click “NEXT.”





7

## EDIT GOALS

Click the pencil icon to edit the goal(s).

8

## EDIT GOAL DETAILS

- These fields are required.
- Click "NEXT."

### 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 "Category"



You will need to change the dates to reflect the current performance year.

9

## COPY & FINISH

- Click "COPY."
- The goal has been added to the current goal plan.