

How to Guides - Manager

Copy a team members goal and assign them to another team member

Step 1: Click the 'Your Goals' icon on the Focus homepage or the 'Your Goals' tab under the 'Your Focus' tab.

Step 2: Click the 'Team Goals' tab

Step 3: Click the arrow across the team member whose goals you want to copy.

Step 4: Click the drop down arrow across from the goal you want to copy. Click 'Copy'

Step 5: Make any updates to the goal and then select 'Your Team' under 'Assignment'

Step 6: Select the box next to the relevant team member(s). Click 'Submit'

Note: This will take a few minutes to populate.

The screenshot shows the 'Your Goals' interface. At the top, there are two tabs: 'Your Goals' and 'Your Focus'. The 'Your Goals' tab is selected. Below the tabs, there are two sub-tabs: 'My Goals' and 'Team Goals'. The 'Team Goals' tab is selected. Below the sub-tabs, there is a search bar with a 'Current Period' dropdown, date pickers for '01/07/2018' and '30/06/2019', and a 'Search' button. Below the search bar, there are checkboxes for 'Display cancelled' and 'Hide Completed', and a dropdown for 'All Statuses'. Below the search bar, there is a section for 'Fred Test' with a 'Total weighting: 0%' and a dropdown arrow. Below the 'Fred Test' section, there is a 'Goal statement' section with 'Status: Not Started', 'End Date: 30/06/2019', and 'Weight: 0%'. Below the 'Goal statement' section, there is a dropdown arrow. Below the dropdown arrow, there is a menu with options: 'Edit', 'Copy', 'Cancel', and 'View History'. The 'Copy' option is selected. Below the 'Copy' option, there is a section for 'Isabelle King' with 'No Goals in the current period'. Below the 'Isabelle King' section, there is an 'Assignment *' section with the text 'Select who this goal is being assigned to.' and a note '* It's always good to have a chat before assigning goals in the system.' Below the 'Assignment *' section, there are two radio buttons: 'Yourself' and 'Your team'. The 'Your team' radio button is selected. Below the 'Assignment *' section, there is a table with columns: 'Name', 'Title', and 'Direct and indirect reports'. The table has two rows: 'George Chavez' and 'Kim Keep'. The checkbox next to 'Kim Keep' is selected.

Name	Title	Direct and indirect reports
George Chavez		
Kim Keep		