



## How to.....add or update Progress against your objectives and actions

### Purpose:

This guide describes how to add **Progress** to your existing strategic and personal development objectives and actions.

### Logging in to YourHR:

To log into YourHR, please refer to the **How to...Log in to YourHR Guide (ESS 1)** After login you will be presented with the **Employee Self Service Homepage**.

- Select **Goals and Performance** from the options at the top of the screen



Your annual and personal development objectives and associated actions will have been added and approved at this point. If not, please see;

- **'How to ..... add your Annual objectives'**
- **'How to ..... add Actions to your objectives'** or
- **'How to .....complete your Personal Development Plan (PDP)'**
  
- Your objectives will be displayed as below. You will need to use the scroll bar on the right to see all of them.

Form name	Start date	Target date	Linked to	Current status	
C02 Ensure corporate bala...	1 Apr 2019	31 Mar 2020		Progress	Actions
C03 Partners and key stak...	1 Apr 2019	31 Mar 2020		Progress	Actions
F01 Deliver our 19-20 budg...	1 Apr 2019	31 Mar 2020		Progress	Actions

- This Guide covers two areas:-
  - Adding Progress to your Actions
  - Adding Progress to your overall Objectives
- You will add progress to your actions regularly but may only want to add progress to the overall objectives before your 6 and 12 monthly reviews

## Adding progress against actions

- Click on **Actions** beside the relevant objective. The following screen will appear:

Action list					
Action title	Type	Start date	Completion date	Details	Progress
Get feedback on the framework after the 6 month reviews	Milestone	01/10/2019(Target)	17/10/2019(Target)	▶	▶
Review and update framework as necessary	Milestone	21/10/2019(Target)	01/11/2019(Target)	▶	▶
Scorecard used to review performance and inform CB from end June 2019	Measurement	01/04/2019(Target)	21/06/2019(Target)	▶	▶

[Add action details](#)

- Click on the arrow to the right of the relevant action, under the title **Progress**. The following screen will appear:

Action progress list				
Date	Status	Percentage complete	Created by	Details

- Click on the **Add Action progress details**. The screen below will be displayed:

[Back to action progress](#)

**Action progress details: New**

C02 Ensure corporate balanced scorecard framework is robust, accurate

Date ●  
08/04/2019

Status ▼

Percentage complete

Created by  
Mrs Ann Hancox

Comments  
|

- The original objective to which the action is attached will be displayed and the current date. This date can be amended if required
- Click on the dropdown arrow beside **Status** and select the relevant option from;
  - Cancelled
  - Completed
  - Deferred
  - **In progress**
  - Not started
- Give an indication of **Percentage complete**
- Add details of progress, if appropriate, under **Comments**. Click **Save**
- Click **Back to actions** to return to the main screen
- Repeat the process for the remaining actions in the list
- When all progress has been added for all your **Actions**, click on the **X** in the top right hand corner and you will return to the Home screen

---

## To update progress against actions

- Select **Goals and Performance** from the options at the top of the screen



- Your objectives will be displayed as below. You will need to use the scroll bar on the right to see all of them.

Objectives						🔍	+	Add objective
Form name ▲	Start date ▲	Target date ▲	Linked to ▲	Current status ▲	▲			
☰ C02 Ensure corporate bala...	1 Apr 2019	31 Mar 2020				Progress	Actions	🗑️
☰ C03 Partners and key stak...	1 Apr 2019	31 Mar 2020				Progress	Actions	🗑️
☰ F01 Deliver our 19-20 budg...	1 Apr 2019	31 Mar 2020				Progress	Actions	🗑️

- Click on **Actions** beside the relevant objective. The following screen will appear:

**Action list**

Action title	Type	Start date	Completion date	Details	Progress
Get feedback on the framework after the 6 month reviews	Milestone	01/10/2019(Target)	17/10/2019(Target)	▶	▶
Review and update framework as necessary	Milestone	21/10/2019(Target)	01/11/2019(Target)	▶	▶
Scorecard used to review performance and inform CB from end June 2019	Measurement	01/04/2019(Target)	21/06/2019(Target)	▶	▶

[Add action details](#)

- Click on the arrow under **Progress** beside the action you wish to update. The following screen will appear:

**Objective** ✕

[Back to actions](#)

**Action progress list**

Date	Status	Percentage complete	Created by	Details
20/05/2019	In progress	20	Miss Sian Owen	▶

[Add action progress details](#)

- Click on the **Add action progress details** button
- Select the relevant status from the drop down list

- Update **Percentage complete**
- Add details of progress, if appropriate, under **Comments**
- Click **Save**
- The updates should be on the screen and there will be a message saying **Changes have been saved**
- Click on **Back to action progress** and then **Back to Actions**. Continue updating progress against your actions in the same way.

## Adding progress against objectives

- Your objectives will be displayed as below. You will need to use the scroll bar on the right to see all of them.

Objectives						🔍	+	Add objective
Form name ▲	Start date ▲	Target date ▲	Linked to ▲	Current status ▲	▲			
☰ C02 Ensure corporate bala...	1 Apr 2019	31 Mar 2020				Progress	Actions	🔗
☰ C03 Partners and key stak...	1 Apr 2019	31 Mar 2020				Progress	Actions	🔗
☰ F01 Deliver our 19-20 budg...	1 Apr 2019	31 Mar 2020				Progress	Actions	🔗

- Click on **Progress** beside the relevant objective. The following screen will appear:

Objective progress list						
Current ▼						
Date	Status	Percentage complete	Created by	Authorisation status	Details	

- Click on **Add objective progress details** at the bottom of the screen
- Complete this screen as you would for **Actions** above and **Save**
- The screen above should now be populated with your progress and there will be a message saying **Changes have been saved**
- Click on the **X** in the top right hand corner and you will return to the Home screen

## To edit or update progress against objectives

- Your objectives will be displayed as below. You will need to use the scroll bar on the right to see all of them.

Form name	Start date	Target date	Linked to	Current status
C02 Ensure corporate bala...	1 Apr 2019	31 Mar 2020		Progress Actions
C03 Partners and key stak...	1 Apr 2019	31 Mar 2020		Progress Actions
F01 Deliver our 19-20 budg...	1 Apr 2019	31 Mar 2020		Progress Actions

Objective progress list					
Current					
Date	Status	Percentage complete	Created by	Authorisation status	Detail
11/04/2019	In progress	30	Mrs Ann Hancox	Authorised	

- Click on **Progress** beside the relevant objective and you will see the following screen:
- Click on **Add objective progress details** and complete the screen as you would for updating **Actions**, i.e. update **status**, **percentage complete** and **Comments** as required
- Choose **Save**
- The screen above should display your updated progress and there will be a message saying **Changes have been saved**
- Click on the **X** in the top right hand corner and you will return to the Home screen

Creation Date	May 2019
Author	AH