

## Building Goals

1. Select the **Goals & Plans** tab at the top of the screen to build and manage goals and plans.
2. Select **Create a Goal** to be taken to Step 1 of the Goal Builder process. This step requires you to type a goal into the narrative box provided.
3. Determine if your goal is academic or organizational by the type of Measurable Objective you choose. The Type 1 measurable objective corresponds to an academic goal and the Type 2 measurable objective corresponds to an organizational goal. Your selection will determine which prompts are provided during the construction of your measurable objective in Step 2 of the goal builder.
4. Upon completion of your goal statement, select **Continue**.
5. To construct your measurable objective, systematically answer the series of prompting questions to clarify who, what, and by when of the objective. Select **Next**.
6. To create a new strategy, provide a **Strategy Name** and brief **Description** of the strategy. **NOTE:** All strategies must have a unique name. State the **Research** used to support this strategy. Select **Preview**. If you are satisfied, select **Accept and Continue**. If you need to make changes, select **Back**.
7. Provide an **Activity Name** and brief **Description** of the activity. Identify an **Activity Type**, select the activity **Begin** and **End** dates, select a **Funding Source** and **Funding Amount**, then list the **Staff Responsible** for activity implementation and oversight. Separate each name by a comma or return. Upon completion of every field, select **Preview**. If you need to make changes, select **Back**. If you are satisfied with your activity, select **Accept and Finish**.
8. Once you have completed a goal, objective, strategy, and activity, you will be taken to the Goal Details page.
9. This page shows the hierarchical outline of the goal. Select **Action** to review any components of the goal and/or to make edits.
10. Select **Action** for the level above where you want to add a component to any goal. The selection to add a goal component will take to you that specific page where you can provide the additional objective, strategy, or activity information. Select **Save and Continue**.
11. To edit a goal component, select **Action** from the Goal Details page for the component that needs to be edited and select **Edit** from the menu to make any necessary edits.
12. To add an additional resource (funding source) to an Activity, use the process outlined above to edit the Activity and then scroll to the bottom of the page and select **Add Resource**. Repeat this process as needed until all resources have been added to the Activity. Select **Update** on the Activity page.

## Creating a Plan

1. From the Goals and Plans overview page, select **Create a Plan**.
2. Provide a name and description for your plan.
3. Select the goals you want to include in the plan. Selecting at the goal level will automatically select all objectives, strategies, and activities within that goal. Selecting at a lower level, such as the activity, will allow for only that specific activity and its related strategy, objective and goal to be included in the plan.
4. Once you have selected all the desired goals, select **Save** at the bottom of the page. You can now view your plan output by selecting **View PDF**.

### Tracking Progress:

1. Begin by selecting the goal for which you would like to track progress from the Goals and Plans overview page.
2. From the Goal Details page, select **Action** for the component where you would like to make a Progress Note. Select **Add Progress Note** from the menu. Progress notes can be added at all levels of the goal.
3. A pop-up window will appear allowing for a comment to be added. At the measurable objective and activity levels, an additional progress status can be added.
  - a. **Measurable Objective:** Met or Not Met
  - b. **Activity:** In Progress, Complete, Not Completed, or Not Applicable
  - c. Provide the desired comment and/or progress status and select **Save**.
4. To view the Progress Log of all notes provided for a goal component, select the **Notes** link next to the component.

### Goals Reporting:

1. From the **Goals & Plans** tab, select the **Reports** sub tab. Select the report you want to access by selecting the report name.
2. Upon selection of the report, the system will present a series of filtering criteria. Select the criteria you want to include in your report output.
3. Once your criterion has been identified, select **Export as CSV** or **Export as Excel**. The system will email you the requested file within 10-15 minutes.