

# How Do I Generate a Goals Status Report

The Goals Status Report summarizes the status of all goals for specific users during a specific time period. This report graphically displays the percentage of all goals that are in each progress status (e.g., Completed, Pending Approval, In Progress, Behind Schedule).

This report is interactive and the output can be edited and altered after it is displayed.

**Follow the Menu Path: Reports > Standard Reports > Performance > Goal Reports > Goal Status Report**

In the fields **Date Filters**, select the current fiscal year;

In the field **User Criteria**, the report should already default to your Center; no additional change to this field is necessary;

In the field **Advanced Filters**, no criteria needs to be selected;

Click on **View Report**

## Goal Status

The screenshot shows the 'Report Criteria' configuration page for the Goal Status report. It features a blue header with the title 'Report Criteria' and a subtitle 'Display a summary of goal statuses for a specific set of users.' Below the header are three main sections: 'DATE FILTERS', 'USER CRITERIA', and 'ADVANCED FILTERS'. The 'DATE FILTERS' section includes a 'Date Criteria' dropdown menu set to 'Select', and 'From' and 'To' date pickers set to '7/1/2015' and '6/30/2016' respectively. The 'USER CRITERIA' section has a 'User Criteria' dropdown set to 'Select Criteria', a checkbox for 'All users in Division: Client Test Div- DO NOT DEACTIVATE (CTD)', and a checked checkbox for 'Include Subordinates'. The 'ADVANCED FILTERS' section has a 'Display OU' dropdown set to 'None'. At the bottom, there is a 'VIEW' section with a 'View Report' button.

## Report Output

There are 4 different views that can be chosen to view the results. The system defaults to the **Ungrouped** view.

Each view displays a pie chart representing the number of goals in each status. Status can be determined by goal, task, and target progress and can also factor in the amount of time

remaining for completion. Clicking any of the pieces of the pie will filter the list of results to only the status that was clicked. For example, if you click the In Progress section, only goals in On Track status will display.

There are export options for each view, including Printable Version and Export to Excel. Each option exports the current view of goals, but does not include the pie chart.

### Output - Ungrouped View

The Ungrouped view is the default view and displays information about each goal by user.

