



# eCivis Goals & Metrics v.1.0

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## Revisions

Revision #	Date	Changes
1.0	5/26/20	Original First Draft Document
1.1	6/11/20	<ul style="list-style-type: none"><li>- Fixed layout of document, added table of contents, page numbers and fixed grammar.</li><li>- Slight changes to "Edit a Goal" to move the archive and restore buttons and replace screen shot of edit goal modal</li><li>- Added new section under "Creating Initiative &amp; Child Goals" called "Editing Initiatives", moved the "Archive &amp; Restore Buttons" text here for clarity. Added full details with screenshots for "Archive" and "Restore" buttons feature that is unique to Initiative goals with child goals.</li><li>- G&amp;M Reporting, updated screenshot for Department Performance tab to remove visual bug.</li></ul>

## Background

In 2017, we began having discussions with our Client Advisory Board (CAB) about some of the challenges they faced outside of Grants Network in their own management of grants and reporting. The many meetings we had was an attempt to better understand our customers and to try and identify any future enhancements we could make to Grants Network. What grew out of these early meetings was a shared pain point. As customers that used Grants Network to manage their grants it was increasingly difficult to highlight and report on how the grants that were awarded were contributing to the goals and progress of the organization. We quickly discovered that three of our top clients had a shared problem - Osage Nation, Chickasaw Nation, and City & County of Denver.

The crux of the problem as described by our CAB customers was that the leaders of their organizations had put forth a series of goals and initiatives for the year that would require the departments to contribute to their overall success but grant managers had a hard time of showcasing how grants contributed to those goals. Grants are vehicles to help complete projects and services that do have a direct impact on organization goals but it's incredibly difficult to track.



In the case of Denver, Rory had explained to me in detail that members of a congressional group would come by and ask for a report on federal grants with the intention of showing how many Denver citizens had been served by those grants. In order to accomplish this task, Rory would commandeer 3-4 full-time employees or contractors and spend roughly two weeks of time to prepare the reports needed. Rory had explained that it was a shame since all our grant information was already in Grants Network but that any kind of advanced goal and metric tracking or reporting was not available. We could build the kind of enterprise features that could save his city/county the costs of those 3-4 employees each time reports were required.

Since this conversation with Rory, I spent roughly 2 years of time working with our CAB members to understand if what Rory was suggesting would also benefit them as well. We spent that time creating and refining mock-up documents for new feature development as well as competitive analysis on other products in the market for performance reporting, public data sharing as well as how city and county entities liked reporting out their annual planning initiatives like the City of Los Angeles Sustainability Plans. At the end of this period we had a clearly defined and drafted enterprise product feature that was ready to build.

## Introduction

The eCivis Goals & Metrics v.1.0 enterprise feature can be described as a means of providing insight and transparency into how grants are helping an organization meet their initiatives, goals and objectives through greater visibility throughout the organization, departments, projects and the grants they administer. One of Goals & Metrics greatest strengths is its ability to quickly report out executive dashboard views of the organization's major initiatives like mayoral goals, or tribal chief's goals along with department and metrics reports for complete visibility through the organization.

What makes the reporting work is the requirement to establish good organization goals, department goals, project goals and grant goals. Once the goals are established, then metrics can be created at the project-grant level that can be associated closely with the established goals.



Once there is a link established between metrics and goals, any new progress recorded on metrics is immediately rolled-up across the enterprise organization and visible in grants network as well as within the reports.

This system provides the best of both worlds. Organizations that want to benefit from that level of transparency and insight can create links between metrics and goals to see that kind of enterprise roll-up, but it doesn't prevent departments and project leads from establishing their own goals. Departments can create goals that serve to contribute to their organization goals, but they can also create goals that only serve their department's needs. Within a department, any projects and project-grants can create goals that either serve the department they reside in, or the organization. Some goals at the project-grant level could be a requirement of the contract and not necessarily a direct link to department or organization goals. This system provides that level of flexibility. Likewise, metrics that get created at the project-grant level can be just in support of the grant and no other goals to meet a contractual requirement, but additional metrics can be created to benefit upstream goals. Metrics and the progress created within them are the real driving force of roll-up enterprise reporting and transparency.

While this system has flexibility, decisions were made very early on with the Client Advisory Board (CAB) that this system would not allow a metric or goal from one department to report to a goal in another department. This system only works in a siloed stream from Organization > Department > Project > Project-Grant.

Let's make some Goal & Metric magic!



## Organizational Goals

### Organization Project Dashboard

Information pertains to active grants in projects currently "open" in Grants Network.

#### Organization Goals

Minimize  
Add Goal Edit

Local Solar - 2020

5 goals displayed Search:

Type	Title	Description	Year	Target	Current
Goal	Solar Panel Installations	Solar Panel Installations throughout our city	2020	10,000 Installations	100,023 Installations

Showing 1 to 1 of 1 goals ← Previous 1 Next →

Reduce Homelessness

5 goals displayed Search:

Type	Title	Description	Year	Target	Current
Output	Prevent 10,000 Citizens from Becoming Homeless	Prevent 10,000 Citizens from Becoming Homeless	2005	10,000 Citizens	0 Citizens
Objective	Provide Interim Housing for 40,000 Homeless	Provide interim housing opportunities to 40,000 homeless	2020	40,000 Housed	70 Housed
Outcome	Provide Permanent Housing to 40,000 Homeless	Provide permanent housing solutions to 40,000 homeless	2020	40,000 Housed	15 Housed
Goal	Reduce Juvenile Recidivism by 2,000	Reduce Juvenile Recidivism by 2,000	2020	2,000 Juveniles	0 Juveniles

Showing 1 to 4 of 4 goals ← Previous 1 Next →

## Overview

On the Organization dashboard is a new expandable and collapsible widget for "Organization Goals" as seen above, expanded. When goals are present, the view will show in alphabetical order the "Initiatives" and their "Child goals". For example, "Local Solar - 2020" is an initiative. An initiative is nothing more than a goal, but it generally requires one or more child goals to help reach its promise to the public or the organization leader that creates them. The Local Solar - 2020 initiative has a single child-goal of "Solar Panel Installations". It is these child goals that can have rolled up metric progress reporting to it. In this example we see a goal target of



10,000 installations but the current column is showing 100,023 installations. This current column is the enterprise roll-up value. This value could be composed of progress on a metric that is rolling up from project-grant > project > department.

Each initiative display has a data table with the tools to sort columns, keyword search for specific goals, adjust the number of goals being displayed as well as 'previous' and 'next' navigation buttons when more goals are associated with an initiative than can be displayed in the table.

Not shown in the picture is also another section in Organization Goals for "Additional Goals" as a single data table of those goals that do not have child-goals. For an organization it may not be necessary to utilize initiatives and child goals, perhaps they just have stated goals or the goals they are creating are still being drafted. The "Additional Goals" section at the bottom will show their singular goals which can be further edited to "report to" another initiative to create the parent/child relationship that we see with "Local Solar - 2020", for example.

## No Organization Goals

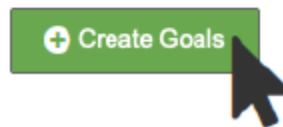
When an organization is first starting, they won't see the data tables and goals because they haven't created it yet. When they open the Organization Goals widget, they will see this.





No organization goals have been created yet. Would you like to start?

Organization goals are initiatives and desired outcomes that can be tied to contributing departments and the projects they work on. Performance metrics and progress roll back up to the top for organization wide reporting.



## Create Goals

Clicking on the Create Goals button will show the user a new popup for creating a goal. This popup is commonly used for creating goals at the Organization, Department, Project and Project-grant level but there are a few subtle changes based on where you are creating a goal.



Organization Goals

Minimize

### Add Organization Goal

Instructions: Complete the form to add a goal for your organization.

Title: \*  255 characters left

Reports To: \*  Organization  None

Parent Goal:

Type: \*  Target: \*  Target Label: \*  (shown on reports as: 0)

Fiscal Year: \*  Goal Reporting Audience:  Public  Internal / Admin.  Press  Other External

Description: \*  1000 characters left

Showing 1 to 4 of 4 goals

← Previous | Next →

After you create your first organization goal as a type of 'Initiative', you can associate your second goal to your first using 'Reports To' and 'Parent Goal'. This allows you to have a top layer of initiatives with one secondary layer of sub-goals that make up that initiative. Organization goals are the only goals that support this two-tiered approach.

## Fields & Display

Title:	The title of the goal, a 255-character limit
Reports To:	Radio button selection indicating how to relate this new goal to one that already exists. At the Organization level, you could only choose Organization or None. This choice helps you build a parent/child relationship between initiatives and goals. Making a choice other than None here will enable the next field "Parent Goal"



Parent Goal:	Disabled by default, if a choice (other than None) is made in Reports To, this drop-down list will populate with goals to build a parent/child relationship between goals such as initiatives and child-goals. At the organization level here, the only goals that will show in this drop-down are goals that are a type of "Initiative".
Type:	<p>The type of goal this is, drop-down choices are: Initiative, Objective, Priority, Goal, Output, Outcome, Other. (Goal is the default)</p> <p>When Type is Initiative, the Target and Target Label fields are disabled. Initiatives require child-goals and those child goals will have their own targets and labels.</p> <p>If "Other" is picked, a new text field appears, below type, with a label of "Custom Type" limited to 20 characters. Allowing someone to create a custom type of goal not listed in the drop-down.</p>
Target:	<p>Target is a numerical value we wish to achieve by this goal. This field only allows numbers to be typed with a max value of 9,999,999.</p> <p>Typing in this field also begins to change the display for (shown on reports as:)</p>
Target Label:	<p>Target label is text that describes the target such as "10,000 Green Jobs". 10,000 is the target and "Green Jobs" is the target label. This field allows for 20 characters of text. This field also only allows text Aa-Zz to be entered. No special characters, commas, dashes of any kind.</p> <p>Typing in this field also begins to change the display for (shown on reports as:)</p>



Shown on reports as:	This helper text will guide the user creating a goal to understand how target and target label are going to be used so they can see in reports their entered values will be shown together like “10,000 Green Jobs”.
Fiscal Year	A drop-down menu showing previous 15 years and next 15 years. Default selection is current year.
Goal Reporting Audience:	These checkboxes represent an audience tag you can apply to the goal. Later when reporting on goals, you can filter by these audience tags. These audiences are Public, Pres, Internal / Admin., and Other External.
Description:	Description is a free form text area with 1,000 characters maximum used to describe the goal in greater detail.

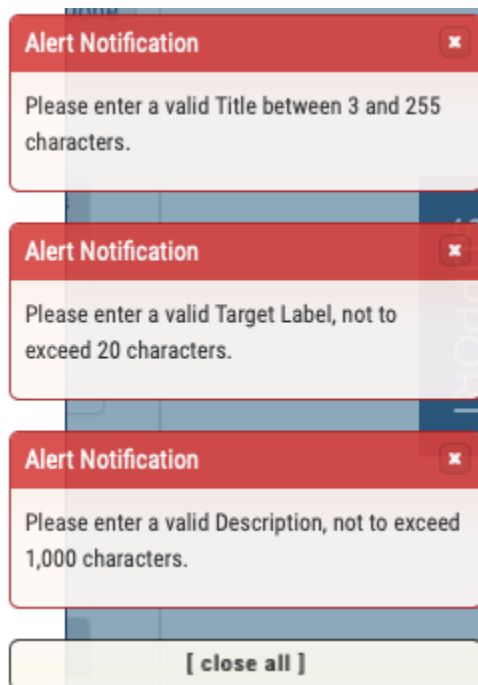
## Buttons

Cancel	Cancel will close the goal modal, and nothing will be saved.
Save	Save will verify and validate the data in the goal modal, save all the choices to the database and close the modal window.
Save & Add	Performs the same function as Save but does not close the modal window, instead it resets the goal modal to a default view where another new goal can be added.

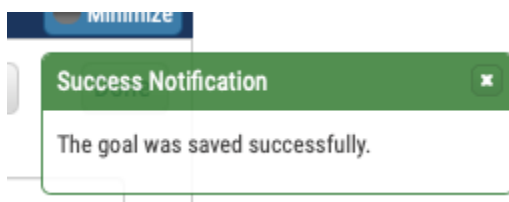


## Validations

Upon saving a goal, the form will immediately attempt to validate that all the required fields have values and that they have the correct values and limits. If there are any omissions that prevent saving, on screen messaging will indicate to the user what is expected.



If no errors are present in the form, the goal should be saved, and the user will be presented with a confirmation of success.





## Viewing Goals (read-only)

By default, the view that displays the goals is in a 'read-only' type of view. If you've only created a few goals and haven't associated any of them with another goal (initiative & child-goal), you may only see the "Additional Goals" section of the Organization Goals widget. Additional goals are only visible at the organizational level. It is not present in departments, projects or project-grant sections.

### Standalone Goal View

Organization Goals Minimize

Add Goal Edit

Additional Goals

5 goals displayed Search:

Type	Title	Description	Year	Target	Current
Output	Create Substance Abuse Treatment Options for 10,000 Citizens	Create new substance abuse treatment options for 10,000 citizens.	2019	10,000 Citizens	0 Citizens
Goal	Extend Community Engagement to 25,000 Citizens	Extend our community engagement programs reach by 25,000 citizens served.	2020	25,000 Citizens	0 Citizens
Initiative	Promote Income Security for Custodial Parents	Increase the number of custodial parents receiving child support enforcement services who receive full and timely child support payments.	2019	0 N/A	0 N/A
Initiative	Promote Supportive Parenting	Increase the number of vulnerable children and families touched by the County referred to the community-based network of Prevention/Aftercare providers.	2020	0 N/A	0 N/A

Showing 1 to 4 of 4 goals ← Previous 1 Next →

### Initiatives & Standalone Goals View

If Initiative and child-goals are created along with standalone goals, the view is more complete showcasing initiatives at the top and "Additional Goals" at the bottom of the display.



**Organization Goals** Minimize

Add Goal Edit

Local Solar - 2020

5 goals displayed Search:

Type	Title	Description	Year	Target	Current
Goal	Solar Panel Installations	Solar Panel Installations throughout our city	2020	10,000 Installations	100,023 Installations

Showing 1 to 1 of 1 goals ← Previous 1 Next →

Reduce Homelessness

5 goals displayed Search:

Type	Title	Description	Year	Target	Current
Output	Prevent 10,000 Citizens from Becoming Homeless	Prevent 10,000 Citizens from Becoming Homeless	2005	10,000 Citizens	0 Citizens
Objective	Provide Interim Housing for 40,000 Homeless	Provide interim housing opportunities to 40,000 homeless	2020	40,000 Housed	70 Housed
Outcome	Provide Permanent Housing to 40,000 Homeless	Provide permanent housing solutions to 40,000 homeless	2020	40,000 Housed	15 Housed
Goal	Reduce Juvenile Recidivism by 2,000	Reduce Juvenile Recidivism by 2,000	2020	2,000 Juveniles	0 Juveniles

Showing 1 to 4 of 4 goals ← Previous 1 Next →

Additional Goals

5 goals displayed Search:

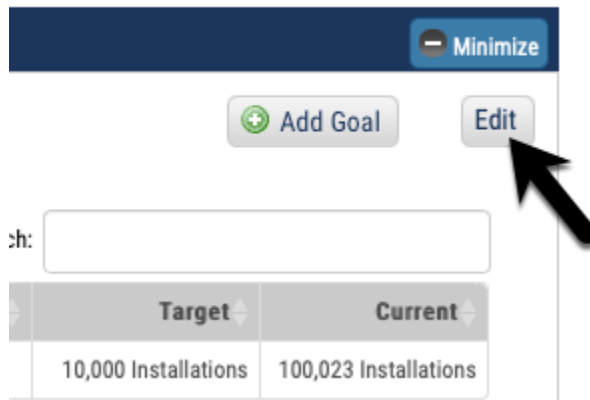
Type	Title	Description	Year	Target	Current
Output	Create Substance Abuse Treatment Options for 10,000 Citizens	Create new substance abuse treatment options for 10,000 citizens.	2019	10,000 Citizens	0 Citizens
Goal	Extend Community Engagement to 25,000 Citizens	Extend our community engagement programs reach by 25,000 citizens served.	2020	25,000 Citizens	0 Citizens
Initiative	Promote Income Security for Custodial Parents	Increase the number of custodial parents receiving child support enforcement services who receive full and timely child support payments.	2019	0 N/A	0 N/A
Initiative	Promote Supportive Parenting	Increase the number of vulnerable children and families touched by the County referred to the community-based network of Prevention/Aftercare providers.	2020	0 N/A	0 N/A

Showing 1 to 4 of 4 goals ← Previous 1 Next →

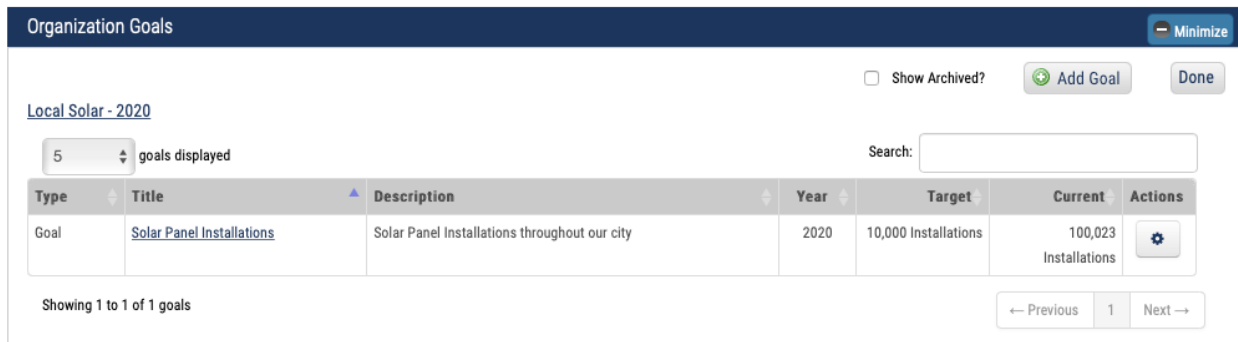


## Goals Edit View

If you need to make changes to existing goals, you must first enter “Edit View” by clicking the “Edit” button in the upper right corner of the goals view.



Clicking the “Edit” button will change the view of all the goals from a read-only view to an edit view. There are new columns and links in the view and data tables.



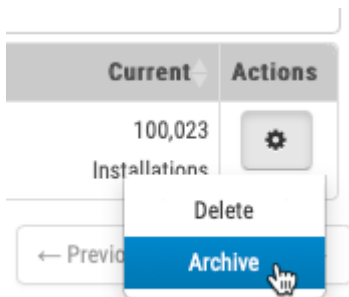




## Buttons

Show Archived?	This checkbox will change the edit view from one that currently shows active goals into one that shows only archived goals. It will toggle from active to archived goals reloading the view.
Add Goal	Performs the same function as adding a goal
Done	Exits the view out of "Edit" mode and back to "Read-Only" view showing "active" goals.

## Display

Hyperlinks	Initiative titles like "Local Solar - 2020", as well as child-goal titles like "Solar Panel Installations" are hyperlinks. Clicking the link will open the goals modal making it possible to edit all the goal information.
Actions Column	<p>This new column on the data table is a drop-down menu button of choices that can be performed on a given goal. The choices, in the active goals edit view are Delete and Archive as seen here.</p>  <p>When you are viewing Archived goals, the choices instead here are Delete and Restore.</p>



## Actions

### *Delete Goal*

From the “Actions” menu, you can choose to **Delete** a goal but, you will only be successful at deleting a goal so long as it meets certain criteria. To successfully delete a goal, the goal:

- Must not be linked to any other goals. For example, an Organization goal cannot be deleted if there is a Department, Project or Project-Grant goal linking (through Reports To and Parent Goal) to the goal you are trying to delete.
- If a goal has no links to other goals, the goal cannot be deleted if the goal has current progress being reported to the goal (from metrics)

Attempts to delete a goal where links or progress is recorded will stop the deletion and the user will get a red error notice “This goal can't be deleted. It has reported progress. You can only archive this goal.”

If a goal can be successfully deleted, it is a ‘soft delete’ and not permanently deleted from our system. Restoring a deleted goal however will require the assistance of the SE team / Customer Success.

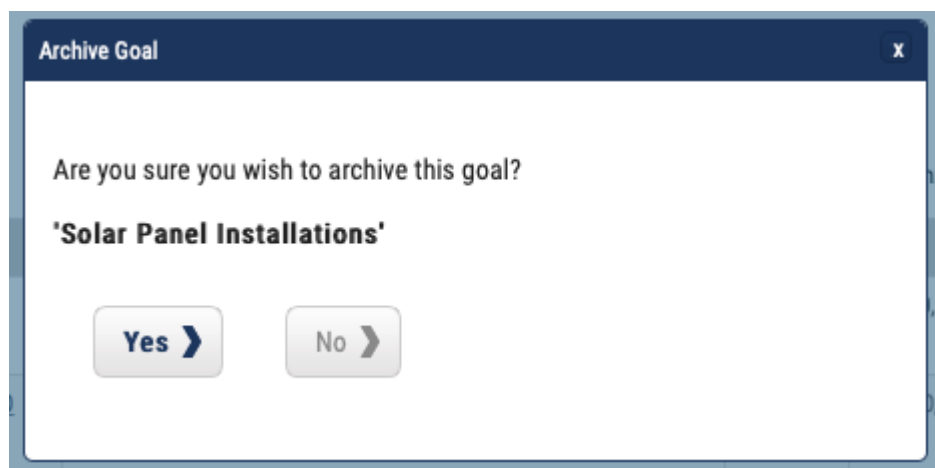
Deleted goals disappear from Grants Network and are not accessible via reports. The system will also provide a confirmation message that the goal was successfully deleted.



## Archive Goal

From the “Actions” menu, you can choose to **Archive** a goal. Performing an archive is relatively simple and removes the goal from an ‘active’ status to an ‘archived’ status. Archived goals are still accessible by users by clicking on the “Show Archived?” checkbox.

Customers will receive a confirmation dialog whenever trying to archive a goal.



When a goal is archived, the status of the goal is changed and put into the archive view. There are no special rules about archiving. For now, when a goal is archived, if it has recorded progress and it reports up to a parent goal the value of the current progress of the parent goal is not adjusted in any way. This behavior could change in the future.

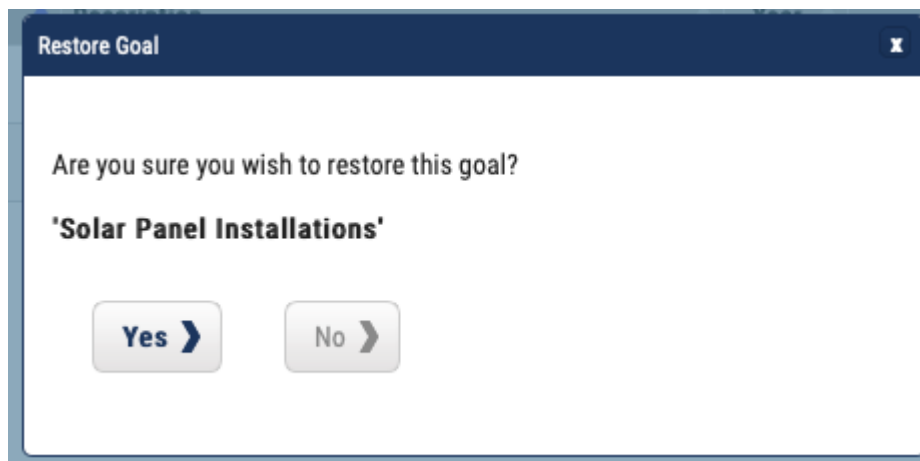
Archived goals do not show up on active dashboards unless you choose to “Show Archived?” and archived goals also do not show up on reports. The system will provide a confirmation message that the goal was successfully archived.



## Restore Goal

From the “Actions” menu (in “Show Archived” view), you can choose to **Restore** a goal. Performing a restore simply moves the archived goal to an “active” status. It’s relatively easy to archive and restore a goal. Restored goals show up in the normal “active” view in dashboards.

Customers will receive a confirmation dialog whenever trying to restore a goal.



The system will provide a confirmation message that the goal was successfully restored.



## Editing a Goal

**Edit Organization Goal**

Instructions: Complete the form to edit this goal for your organization.

Title: \* Solar Panel Installations 230 Characters Left

Reports To: \*  Organization  None

Parent Goal: Local Solar - 2020

Type: \* Goal Target: \* 10,000 Target Label: \* NA  
*(shown on reports as: 10,000 NA)*

Fiscal Year: \* 2020 Goal Reporting Audience:  Public  Internal / Admin.  
 Press  Other External

Description: \* Solar Panel Installations throughout our city 955 Characters Left

After you create your first organization goal as a type of 'Initiative', you can associate your second goal to your first using 'Reports To' and 'Parent Goal'. This allows you to have a top layer of initiatives with one secondary layer of sub-goals that make up that initiative. Organization goals are the only goals that support this two-tiered approach.

When you click a hyperlink for a goal, while in “Edit” mode, you will get a modal dialog much like the one above with all the fields pre-filled with values. All the validation rules will still apply along with the required fields during edit.

### Special Circumstances

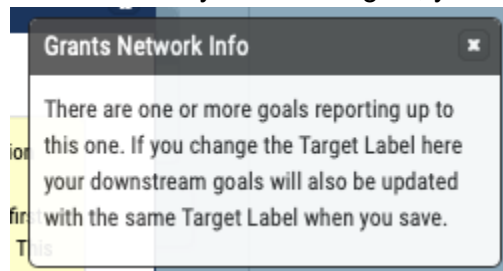
There are some special circumstances you need to be aware of when editing a goal.

- If you are editing a goal’s “Reports To” or “Parent Goal” fields, and the goal you are editing has metric progress reporting up to this goal and this goal already has a “Reports To:” and “Parent Goal:” values pointing to a different goal or initiative the system will



deduct the current progress for this goal from the old values in the Parent Goal field and add them onto the new value you choose after you save the goal.

- a. As an example, let's say you have 500 citizens worth of progress on your goal and it reports to a parent goal of "Goal A" and you change that value to now point to "Goal B". After save, Goal B will have 500 citizens more progress added, and Goal A will have 500 citizens deducted.
  - b. You must be careful here because this assumes both goals have the same Target Label of "Citizens". When you change the Parent Goal during edit, your Target Label will automatically be changed to support what the parent goal is expecting.
- If you are editing a goal that already has other goals reporting up to the one you are editing and you change the "Target Label" field value, you'll get a warning on the screen letting you know that any changes to the Target Label field will automatically change all the downstream Target Label fields.
    - a. As an example, if your goal at an Organization level has a target label of "Citizens" and you Edit the goal, you'll get a warning on the screen



Changing "Citizens" to "Victims" will change the Target Label field value for all the downstream goals that report up to this one such as a Department, Project or Project-Grant goal.



## Creating Initiative & Child Goals

Additional Goals

5 goals displayed Search:

Type	Title	Description	Year	Target	Current	Actions
Output	<a href="#">Create Substance Abuse Treatment Options for 10,000 Citizens</a>	Create new substance abuse treatment options for 10,000 citizens.	2019	10,000 Citizens	0 Citizens	
Goal	<a href="#">Extend Community Engagement to 25,000 Citizens</a>	Extend our community engagement programs reach by 25,000 citizens served.	2020	25,000 Citizens	0 Citizens	
Initiative	<a href="#">Promote Income Security for Custodial Parents</a>	Increase the number of custodial parents receiving child support enforcement services who receive full and timely child support payments.	2019	0 N/A	0 N/A	
Initiative	<a href="#">Promote Supportive Parenting</a>	Increase the number of vulnerable children and families touched by the County referred to the community-based network of Prevention/Aftercare providers.	2020	0 N/A	0 N/A	

Showing 1 to 4 of 4 goals ← Previous 1 Next →

Once you have created an initiative it will show up in the “Additional Goals” section (shown above) for Organization Goals. When you’re ready to create a child-goal to one of the initiatives you’ve already created, you need to create a brand-new goal that you can now link to your previously created initiative.

### NOTE:

Organization goals is the only location you can create Initiatives with child-goals. Initiatives cannot be created at the Department, Project or Project-grant level.



**Add Organization Goal**

Instructions: Complete the form to add a goal for your organization.

Title: \*  188 Characters Left

Reports To: \*  Organization  None

Parent Goal:

Type: \*  Target: \*  Target Label: \*   
*(shown on reports as: 5,000 Citizens)*

Fiscal Year: \*  Goal Reporting Audience:  Public  Internal / Admin.  
 Press  Other External

Description: \*  793 Characters Left

After you create your first organization goal as a type of 'Initiative', you can associate your second goal to your first using 'Reports To' and 'Parent Goal'. This allows you to have a top layer of initiatives with one secondary layer of sub-goals that make up that initiative. Organization goals are the only goals that support this two-tiered approach.

With a new goal created above, we can choose a “Reports To:” of Organization that enables the “Parent Goal:” field and loads the available initiatives into the drop-down menu. We’re choosing to associate this new goal with the organization initiative of “Promote Supporting Parenting”.

When we fill in the rest of the information for this goal and click save, we can now see in the Organization Goals the new Initiative with this child-goal.





Promote Supportive Parenting

5 goals displayed Search:

Type	Title	Description	Year	Target	Current
Output	Expand the outreach of our parenting support programs to 5,000 citizens	The county has existing parenting support programs that are very successful, we feel we can expand the reach of those programs to another 5,000 citizens to help support the Promote Supportive Parenting initiative.	2020	5,000 Citizens	0 Citizens

Showing 1 to 1 of 1 goals ← Previous 1 Next →

**NOTE:**

It bears repeating, Organization goals is the only location you can create Initiatives with child-goals. Initiatives cannot be created at the Department, Project or Project-grant level.



## Editing Initiatives

Promote Supportive Parenting

5 goals displayed

Search:

Type	Title	Description	Year	Target	Current	Actions
Output	<a href="#">Expand the outreach of our parenting support programs to 5,000 citizens</a>	The county has existing parenting support programs that are very successful, we feel we can expand the reach of those programs to another 5,000 citizens to help support the Promote Supportive Parenting initiative.	2020	5,000 Citizens	142 Citizens	

Showing 1 to 1 of 1 goals

← Previous 1 Next →

Reduce Homelessness

5 goals displayed

Search:

Type	Title	Description	Year	Target	Current	Actions
Output	<a href="#">Prevent 10,000 Citizens from Becoming Homeless</a>	Prevent 10,000 Citizens from Becoming Homeless	2005	10,000 Citizens	245 Citizens	
Objective	<a href="#">Provide Intensive Housing for 40,000</a>	Provide intensive housing opportunities to 40,000 homeless	2020	40,000 Homeless	0 Homeless	

Editing initiative goals works just like editing any other goal. Once you're in the "Edit" view, just click on the initiative name to bring up the goal edit modal.



**Edit Organization Goal**

Instructions: Complete the form to edit this goal for your organization.

Title: \* Promote Supportive Parenting 227 Characters Left

Reports To: \*  Organization  None

Parent Goal: None

Type: \* Initiative Target: \* 0 Target Label: \* N/A  
*(Initiatives don't require a target nor target label)*

Fiscal Year: \* 2020 Goal Reporting Audience:  Public  Internal / Admin.  
 Press  Other External

Description: \* Increase the number of vulnerable children and families touched by the County referred to the community-based network of Prevention/Aftercare providers. 848 Characters Left

After you create your first organization goal as a type of 'Initiative', you can associate your second goal to your first using 'Reports To' and 'Parent Goal'. This allows you to have a top layer of initiatives with one secondary layer of sub-goals that make up that initiative. Organization goals are the only goals that support this two-tiered approach.

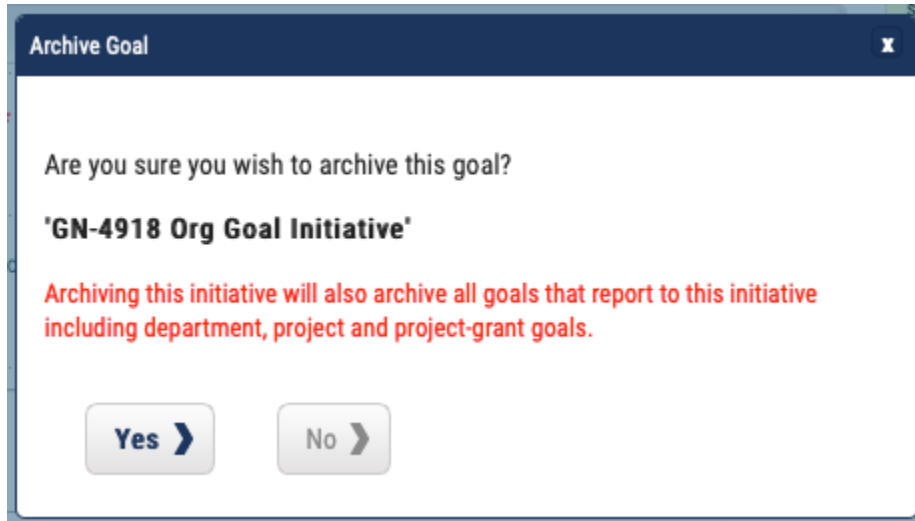
The goal edit modal here for editing initiatives works exactly like it does for other goals. The main difference here is that initiatives don't have an "action" menu that allows you to archive and restore an initiative goal. We've integrated buttons that are only visible on initiative goals (at the Organization level) so you can archive and restore them.

### Archive & Restore Buttons

This screenshot above includes a look at an "Archive" button which is only visible when editing Organization goals that are a type of "Initiative" that already have child goals assigned to them. If the goal is already archived, instead of an "Archive" button there will be a "Restore" button.



## Archive



If you click the archive button on an initiative goal you will see an additional warning in red in the Archive Goal box that reads “Archiving this initiative will also archive all goals that report to this initiative including department, project and project-grant goals.”

Imagine this chain of goals where the one on the bottom reports to the one just above it, and so on, making them all connected:

- Org goal Initiative
  - Org goal child goal
    - Department Goal
      - Project Goal
        - Project-grant Goal

Clicking the “Yes” button will make all these above goals “archived”. This feature is created as an easy way for organizations to archive goals that may be completed or no longer needed as new goals for a new fiscal year are created.



Archiving goals does not delete them, but it will exclude goals from showing up in drop-down menus such as the “Report to:” field or on the Goals and Metrics Report.

## Restore

Organization Goals Minimize

1  Show Archived? Add Goal Done

GN-4918 Org Goal Initiative

5 goals displayed 2 Search:

Type	Title	Description	Year	Target	Current	Actions
Goal	GN-4918 Org Goal Initiative Child Goal	GN-4918 Org Goal Initiative Child Goal	2020	10,000 N/A	0 N/A	

Showing 1 to 1 of 1 goals ← Previous 1 Next →

Additional Goals

To restore an initiative goal, you must first click on the “Show Archived?” check box to force the view to refresh with archived goals. Then click on the initiative goal title (in grey - to demonstrate its archived status) to edit that goal.



**Edit Organization Goal**

Instructions: Complete the form to edit this goal for your organization.

Title: \* GN-4918 Org Goal Initiative 228 Characters Left

Reports To: \*  Organization  None

Parent Goal: None

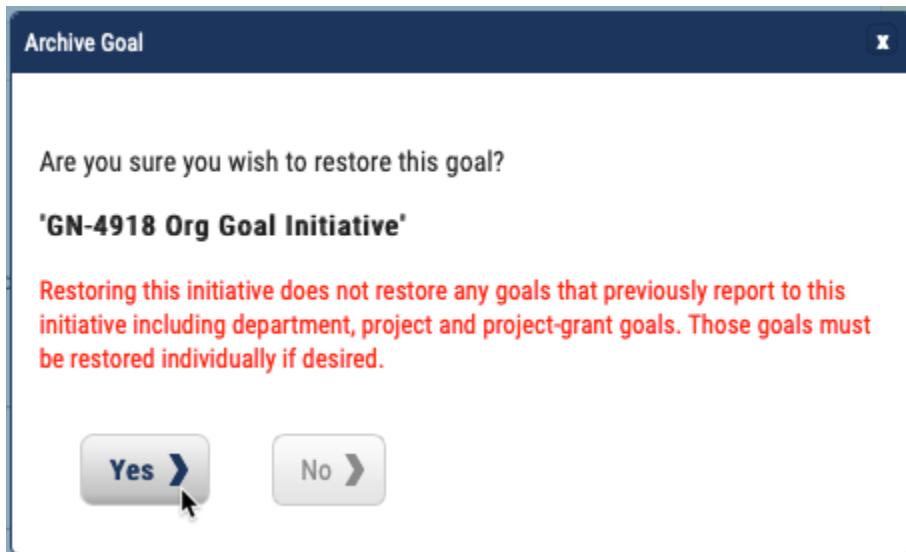
Type: \* Initiative Target: \* 0 Target Label: \* N/A  
*(Initiatives don't require a target nor target label)*

Fiscal Year: \* 2020 Goal Reporting Audience:  Public  Internal / Admin.  
 Press  Other External

Description: \* GN-4918 Org Goal Initiative 973 Characters Left

After you create your first organization goal as a type of 'Initiative', you can associate your second goal to your first using 'Reports To' and 'Parent Goal'. This allows you to have a top layer of initiatives with one secondary layer of sub-goals that make up that initiative. Organization goals are the only goals that support this two-tiered approach.

The goal edit screen works identically to previous instructions. The only difference here is the “Restore” button that will allow you to restore this goal to active status.



Clicking the “Restore” button will bring up the confirmation dialog that has a new warning in red as follows “Restoring this initiative does not restore any goals that previously report to this initiative including department, project and project-grant goals. Those goals must be restored individually if desired.”

Restore will only restore this one initiative goal you are choosing; it will not restore all the downstream goals in the report to chain.



## Department Goals

### Department Project Dashboard

Department Goals Minimize

Show Archived? Add Goal Done

Goals

5 goals displayed Search:

Type	Title	Description	Year	Target	Current	Actions
Outcome	<a href="#">Create Community School Park program for 200,000 citizens</a>	Establish a new Community School Park program with the Los Angeles Unified School District (LAUSD) and other partners to increase access to playgrounds and open space for 200,000 citizens.	2020	200,000 Citizens	0 Citizens	
Outcome	<b><a href="#">Extend access to park services to aid 5,000 homeless</a></b>	Train Department field staff on the City's ?No Wrong Door? policy and Coordinated Entry System to ensure that homeless individuals at parks can connect to available services	2020	5,000 Citizens	0 Citizens	
Outcome	<a href="#">Install 50,000 outdoor security lights</a>	Install new, and ensure 100% functionality of, 50,000 outdoor security lights	2020	50,000 Lights	0 Lights	
Outcome	<a href="#">Link 100 bike paths along the Los Angeles River</a>	Link bike paths and green space to create an active transportation and recreation corridor along the Los Angeles River	2020	100 Bike Paths	0 Bike Paths	

Showing 1 to 4 of 4 goals \* Bold title designates contributing goals ← Previous 1 Next →

(shown with some basic Department only goals, and one contributing goal in bold)

## Overview

On the Department dashboard is a new expandable and collapsible widget for “Department Goals” as seen above, expanded. When goals are present, the view will show in alphabetical order the department goals including those goals that contribute up to organization goals (in bold). For example, “Create Community School Park program for 200,000 citizens” is a department-only goal that projects, or project-grant goals could contribute to. The goal in bold, “Extend access to park services to aid 5,000 homeless” is a department goal that reports up to an organization goal. When you mouse-over bold goals, you will get a pop-over to indicate what the parent goal is and related information.

Unlike the Organization Goals widget, the Department Goals widget only has a single data table and is incapable of displaying tiers of goals like Initiatives and Child-goals. The Department





Goals table is a flat table in structure. The data table does have the tools to sort columns, keyword search for specific goals, adjust the number of goals being displayed as well as 'previous' and 'next' navigation buttons when more goals are created in the department. The Department Goals table also does not have a section for "Additional Goals" that is only reserved for the Organization Goals.

## No Department Goals

When a department is first starting, they won't see the data tables and goals because they haven't created it yet. When they open the Department Goals widget, they will see this.

The screenshot shows a web interface for a 'Department Project Dashboard'. At the top, there is a breadcrumb trail: 'Home / Org Project Dashboard / Dept Project Dashboard'. Below this, the main heading is 'Department Project Dashboard'. A dark blue header bar for the 'Department Goals' widget contains a 'Minimize' button. The main content area of the widget displays the message: 'No department goals have been created yet. Would you like to start?'. Below this message is a yellow callout box containing the text: 'Department goals are initiatives and desired outcomes that can contribute to your organization goals. Department goals can also be tied to contributing projects and grants. Performance metrics and progress roll back up to the top for organization wide reporting.' At the bottom of the widget is a button labeled 'Create Goals' with a green plus icon.

*(shown with no goals present)*

## Create Goals

Clicking on the Create Goals button will show the user a new popup for creating a goal. This popup is commonly used for creating goals at the Organization, Department, Project and Project-grant level but there are a few subtle changes based on where you are creating a goal.



Organization Goals

Add Organization Goal

Instructions: Complete the form to add a goal for your organization.

Title: \*  255 characters left

Reports To: \*  Organization  None

Parent Goal:

Type: \*  Target: \*  Target Label: \*  (shown on reports as: 0)

Fiscal Year: \*  Goal Reporting Audience:  Public  Internal / Admin.  Press  Other External

Description: \*  1000 characters left

After you create your first organization goal as a type of 'Initiative', you can associate your second goal to your first using 'Reports To' and 'Parent Goal'. This allows you to have a top layer of initiatives with one secondary layer of sub-goals that make up that initiative. Organization goals are the only goals that support this two-tiered approach.

## Fields & Display

Title:	The title of the goal, a 255-character limit
Reports To:	Radio button selection indicating how to relate this new goal to one that already exists. At the Department level, you could only choose Organization or None. This choice helps you build a parent/child relationship between department & organization goals. Making a choice other than None here will enable the next field "Parent Goal"



Parent Goal:	Disabled by default, if a choice (other than None) is made in Reports To, this drop-down list will populate with goals to build a parent/child relationship between goals such as organization child-goals (found under initiatives). At the department level here, the only goals that will show in this drop-down are goals that are child-goals to an organization initiative. What you will not see are actual organization initiatives because initiatives have no targets and target labels.
Type:	<p>The type of goal this is, drop-down choices are: Objective, Priority, Goal, Output, Outcome, Other. (Goal is the default)</p> <p>You will not see an option for “Initiative” here at the department level, that is only reserved for Organization goals.</p> <p>If “Other” is picked, a new text field appears, below type, with a label of “Custom Type” limited to 20 characters. Allowing someone to create a custom type of goal not listed in the drop-down.</p>
Target:	<p>Target is a numerical value we wish to achieve by this goal. This field only allows numbers to be typed with a max value of 9,999,999.</p> <p>Typing in this field also begins to change the display for (shown on reports as:)</p>
Target Label:	<p>Target label is text that describes the target such as “10,000 Green Jobs”. 10,000 is the target and “Green Jobs” is the target label. This field allows for 20 characters of text. This field also only allows text Aa-Zz to be entered. No special characters, commas, dashes of any kind.</p> <p>Typing in this field also begins to change the display for (shown on reports as:)</p>



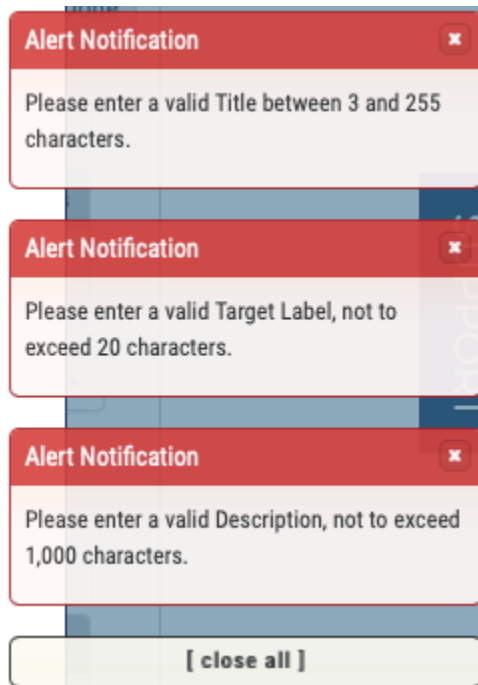
Shown on reports as:	This helper text will guide the user creating a goal to understand how target and target label are going to be used so they can see in reports their entered values will be shown together like “10,000 Green Jobs”.
Fiscal Year	A drop-down menu showing previous 15 years and next 15 years. Default selection is current year.
Goal Reporting Audience:	These checkboxes represent an audience tag you can apply to the goal. Later when reporting on goals, you can filter by these audience tags. These audiences are Public, Pres, Internal / Admin., and Other External.
Description:	Description is a free form text area with 1,000 characters maximum used to describe the goal in greater detail.

## Buttons

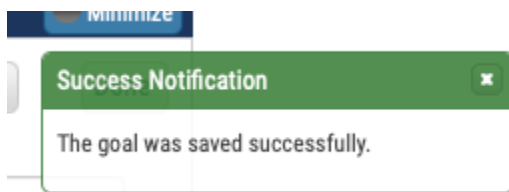
Cancel	Cancel will close the goal modal, and nothing will be saved.
Save	Save will verify and validate the data in the goal modal, save all the choices to the database and close the modal window.
Save & Add	Performs the same function as Save but does not close the modal window, instead it resets the goal modal to a default view where another new goal can be added.

## Validations

Upon saving a goal, the form will immediately attempt to validate that all the required fields have values and that they have the correct values and limits. If there are any omissions that prevent saving, on screen messaging will indicate to the user what is expected.



If no errors are present in the form, the goal should be saved, and the user will be presented with a confirmation of success.





## Viewing Goals (read-only)

By default, the view that displays the goals is in a 'read-only' type of view. Once you've created a few goals, you will see a single data table representing all department goals.

### Standalone Goal View

#### Department Project Dashboard

Department Goals Minimize

Show Archived? Add Goal Done

Goals

5 goals displayed Search:

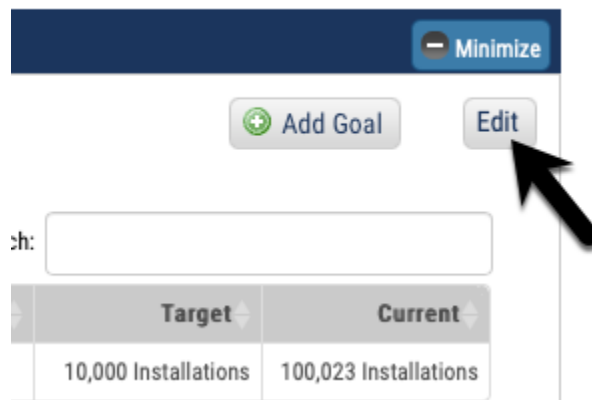
Type	Title	Description	Year	Target	Current	Actions
Outcome	<a href="#">Create Community School Park program for 200,000 citizens</a>	Establish a new Community School Park program with the Los Angeles Unified School District (LAUSD) and other partners to increase access to playgrounds and open space for 200,000 citizens.	2020	200,000 Citizens	0 Citizens	
Outcome	<b><a href="#">Extend access to park services to aid 5,000 homeless</a></b>	Train Department field staff on the City's ?No Wrong Door? policy and Coordinated Entry System to ensure that homeless individuals at parks can connect to available services	2020	5,000 Citizens	0 Citizens	
Outcome	<a href="#">Install 50,000 outdoor security lights</a>	Install new, and ensure 100% functionality of, 50,000 outdoor security lights	2020	50,000 Lights	0 Lights	
Outcome	<a href="#">Link 100 bike paths along the Los Angeles River</a>	Link bike paths and green space to create an active transportation and recreation corridor along the Los Angeles River	2020	100 Bike Paths	0 Bike Paths	

Showing 1 to 4 of 4 goals \* Bold title designates contributing goals ← Previous 1 Next →



## Goals Edit View

If you need to make changes to existing goals, you must first enter “Edit View” by clicking the “Edit” button in the upper right corner of the goals view.



Clicking the “Edit” button will change the view of all the goals from a read-only view to an edit view. There are new columns and links in the view and data tables.



## Department Project Dashboard

Minimize
Department Goals

Show Archived?   
 Add Goal   
 Done

Goals

5 goals displayed Search:

Type	Title	Description	Year	Target	Current	Actions
Outcome	<a href="#">Create Community School Park program for 200,000 citizens</a>	Establish a new Community School Park program with the Los Angeles Unified School District (LAUSD) and other partners to increase access to playgrounds and open space for 200,000 citizens.	2020	200,000 Citizens	0 Citizens	⚙️
Outcome	<b><a href="#">Extend access to park services to aid 5,000 homeless</a></b>	Train Department field staff on the City's No Wrong Door? policy and Coordinated Entry System to ensure that homeless individuals at parks can connect to available services	2020	5,000 Citizens	0 Citizens	⚙️
Outcome	<a href="#">Install 50,000 outdoor security lights</a>	Install new, and ensure 100% functionality of, 50,000 outdoor security lights	2020	50,000 Lights	0 Lights	⚙️
Outcome	<a href="#">Link 100 bike paths along the Los Angeles River</a>	Link bike paths and green space to create an active transportation and recreation corridor along the Los Angeles River	2020	100 Bike Paths	0 Bike Paths	⚙️

Showing 1 to 4 of 4 goals                      \* **Bold** title designates contributing goals

← Previous   
 1   
 Next →

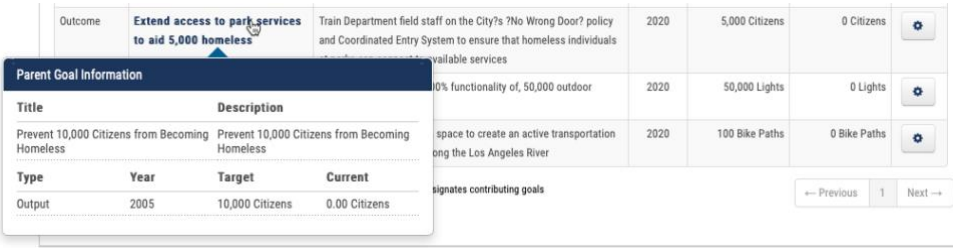
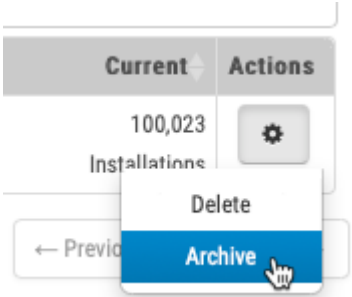
## Buttons

Show Archived?	This checkbox will change the edit view from one that currently shows active goals into one that shows only archived goals. It will toggle from active to archived goals reloading the view.
Add Goal	Performs the same function as adding a goal
Done	Exits the view out of "Edit" mode and back to "Read-Only" view showing "active" goals.





## Display

<p>Hyperlinks</p>	<p>Goal titles like “Create Community School Park program for 200,000 citizens”, as well as bold typed goals are hyperlinks. Clicking the link will open the goals modal making it possible to edit all the goal information.</p> <p>If you mouse-over bold typed goal titles (whether in Edit mode or not) you’ll get a pop-over of parent-goal information that the goal is reporting up to.</p> 
<p>Actions Column</p>	<p>This new column on the data table is a drop-down menu button of choices that can be performed on a given goal. The choices, in the active goals edit view are Delete and Archive as seen here.</p> 



## Actions

### *Delete Goal*

From the “Actions” menu, you can choose to **Delete** a goal but, you will only be successful at deleting a goal so long as it meets certain criteria. To successfully delete a goal, the goal:

- Must not be linked to any other goals. For example, a Department goal cannot be deleted if there is a Project or Project-Grant goal linking (through Reports To and Parent Goal) to the goal you are trying to delete.
- If a goal has no links to other goals, the goal cannot be deleted if the goal has current progress being reported to the goal (from metrics)

Attempts to delete a goal where links or progress is recorded will stop the deletion and the user will get a red error notice “This goal can't be deleted. It has reported progress. You can only archive this goal.”

If a goal can be successfully deleted, it is a ‘soft delete’ and not permanently deleted from our system. Restoring a deleted goal however will require the assistance of the SE team / Customer Success.

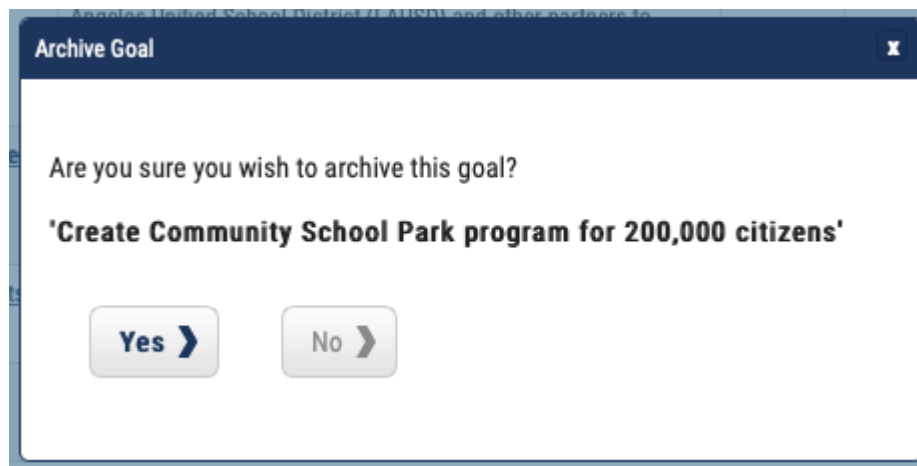
Deleted goals disappear from Grants Network and are not accessible via reports. The system will also provide a confirmation message that the goal was successfully deleted.



## Archive Goal

From the “Actions” menu, you can choose to **Archive** a goal. Performing an archive is relatively simple and removes the goal from an ‘active’ status to an ‘archived’ status. Archived goals are still accessible by users by clicking on the “Show Archived?” checkbox.

Customers will receive a confirmation dialog whenever trying to archive a goal.



When a goal is archived, the status of the goal is changed and put into the archive view. There are no special rules about archiving. For now, when a goal is archived, if it has recorded progress and it reports up to a parent goal the value of the current progress of the parent goal is not adjusted in any way. This behavior could change in the future.

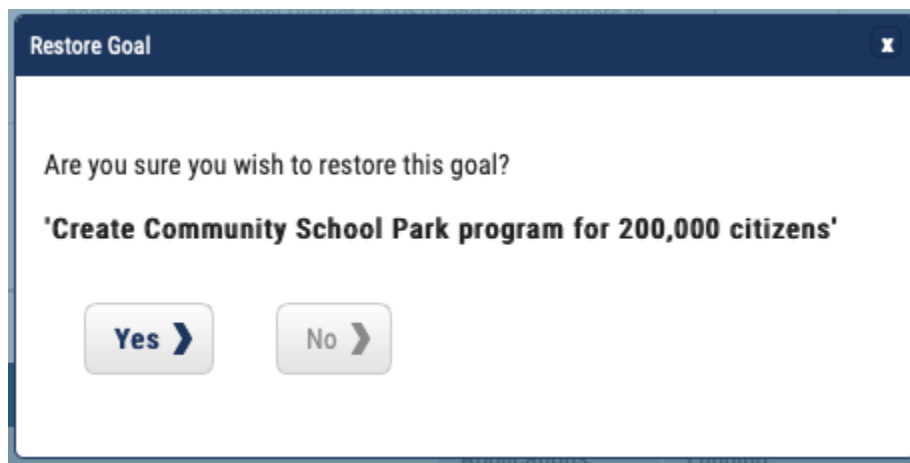
Archived goals do not show up on active dashboards unless you choose to “Show Archived?” and archived goals also do not show up on reports. The system will provide a confirmation message that the goal was successfully archived.



### *Restore Goal*

From the “Actions” menu (in “Show Archived” view), you can choose to **Restore** a goal. Performing a restore simply moves the archived goal to an “active” status. It’s relatively easy to archive and restore a goal. Restored goals show up in the normal “active” view in dashboards.

Customers will receive a confirmation dialog whenever trying to restore a goal.



The system will provide a confirmation message that the goal was successfully restored.



## Editing a Goal

**Edit Department Goal**

Instructions: Complete the form to edit this goal for your department.

Title: \*  203 Characters Left

Reports To: \*  Organization  None

Parent Goal:

Type: \*  Target: \*  Target Label: \*   
*(shown on reports as: 5,000 Citizens)*

Fiscal Year: \*  Goal Reporting Audience:  Public  Internal / Admin.  
 Press  Other External

Description: \*  827 Characters Left

When you create your first department goal, you can associate your goal to your organization goals using 'Reports To' and 'Parent Goal'. This allows your department to transparently contribute to top level initiatives for reporting in your organization. Your project and project grant goals in your department can also report up to department goals you create here for reporting for your department.

When you click a hyperlink for a goal, while in “Edit” mode, you will get a modal dialog much like the one above with all the fields pre-filled with values. All the validation rules will still apply along with the required fields during edit.

### Special Circumstances

There are some special circumstances you need to be aware of when editing a goal.

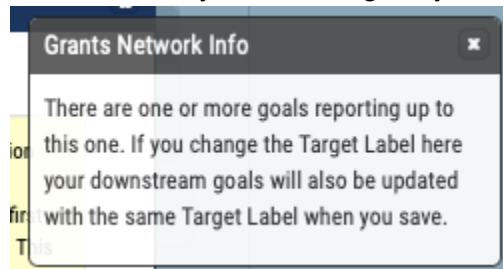
- If you are editing a goal’s “Reports To” or “Parent Goal” fields, and the goal you are editing has metric progress reporting up to this goal and this goal already has a “Reports To:” and “Parent Goal:” values pointing to a different goal or initiative the system will



deduct the current progress for this goal from the old values in the Parent Goal field and add them onto the new value you choose after you save the goal.

- b. As an example, let's say you have 500 citizens worth of progress on your goal and it reports to a parent goal of "Goal A" and you change that value to now point to "Goal B". After save, Goal B will have 500 citizens more progress added, and Goal A will have 500 citizens deducted.
  - c. You must be careful here because this assumes both goals have the same Target Label of "Citizens". When you change the Parent Goal during edit, your Target Label will automatically be changed to support what the parent goal is expecting.
- If you are editing a goal that already has other goals reporting up to the one you are editing and you change the "Target Label" field value, you'll get a warning on the screen letting you know that any changes to the Target Label field will automatically change all the downstream Target Label fields.

- a. As an example, if your goal at an Organization level has a target label of "Citizens" and you Edit the goal, you'll get a warning on the screen



Changing "Citizens" to "Victims" will change the Target Label field value for all the downstream goals that report up to this one such as a Department, Project or Project-Grant goal.



## Project Goals

Project Goals Minimize

Add Goal Edit

Goals

5 goals displayed Search:

Type	Title	Description	Year	Target	Current
Outcome	<b>Create Community School Park program for 2,000 citizens</b>	Establish a new Community School Park program with the Los Angeles Unified School District (LAUSD) and other partners to increase access to playgrounds and open space for 200,000 citizens. For this project, our target is 2,000 citizens.	2020	2,000 Citizens	0 Citizens
Outcome	Hire 2 Full-Time Park Rangers	Hire 2 Full-Time Park Rangers	2020	2 Rangers	0 Rangers

Showing 1 to 2 of 2 goals \* Bold title designates contributing goals

← Previous 1 Next →

*(shown with some basic Project goals, and one contributing goal in bold)*

## Overview

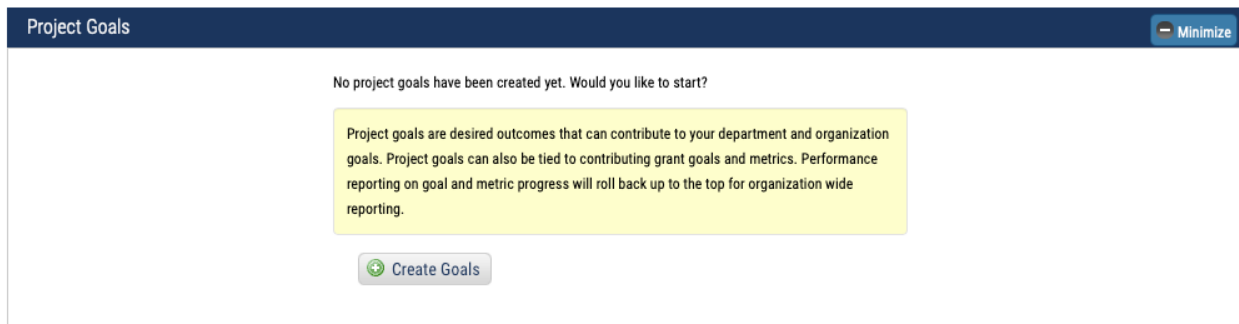
On the Goals & Metrics from the Project dashboard is a new expandable and collapsible widget for “Project Goals” as seen above, expanded. When goals are present, the view will show in alphabetical order the project goals, including those goals that contribute up to department or organization goals (in bold). For example, “Hire 2 Full-Time Park Rangers” is a project-only goal that project-grant goals could contribute to. The goal in bold is a project goal that reports up to a department goal. When you mouse-over bold goals, you will get a pop-over to indicate what the parent goal is and related information.

Project Goals are identical in display and function as Department Goals. The Project Goals table is a flat table in structure. The data table does have the tools to sort columns, keyword search for specific goals, adjust the number of goals being displayed as well as ‘previous’ and ‘next’ navigation buttons when more goals are created in the department.



## No Project Goals

When a project is first starting, they won't see the data tables and goals because they haven't created it yet. When they open the Project Goals widget, they will see this.



*(shown with no goals present)*

## Create Goals

Clicking on the Create Goals button will show the user a new popup for creating a goal. This popup is commonly used for creating goals at the Organization, Department, Project and Project-grant level but there are a few subtle changes based on where you are creating a goal.





**Add Project Goal**

Instructions: Complete the form to add a goal for your project.

Title: \*  *255 characters left*

Reports To: \*  Organization  Department  None

Parent Goal:

Type: \*  Target: \*  Target Label: \*  *(shown on reports as: 0)*

Fiscal Year: \*  Goal Reporting Audience:  Public  Internal / Admin.  Press  Other External

Description: \*  *1000 characters left*

Showing 1 to 2 of 2 goals

When you create project goals, you can associate your goal to your department and organization goals using 'Reports To' and 'Parent Goal'. This allows your project to transparently contribute performance progress to top level initiatives for reporting in your organization.

## Fields & Display

Title:	The title of the goal, a 255-character limit
Reports To:	Radio button selection indicating how to relate this new goal to one that already exists. At the Project level, you could choose Department or Organization or None. This choice helps you build a parent/child relationship between project, department & organization goals. Making a choice other than None here will enable the next field "Parent Goal"
Parent Goal:	Disabled by default, if a choice (other than None) is made in Reports To, this drop-down list will populate with goals to build a parent/child relationship between goals such as organization child-goals (found under



	<p>initiatives) or department goals. At the project level here, the only goals that will show in this drop-down are goals that are child-goals to an organization initiative or department goals depending on what you choose in Reports To.</p>
Type:	<p>The type of goal this is, drop-down choices are: Objective, Priority, Goal, Output, Outcome, Other. (Goal is the default)</p> <p>You will not see an option for “Initiative” here at the project level, that is only reserved for Organization goals.</p> <p>If “Other” is picked, a new text field appears, below type, with a label of “Custom Type” limited to 20 characters. Allowing someone to create a custom type of goal not listed in the drop-down.</p>
Target:	<p>Target is a numerical value we wish to achieve by this goal. This field only allows numbers to be typed with a max value of 9,999,999.</p> <p>Typing in this field also begins to change the display for (shown on reports as:)</p>
Target Label:	<p>Target label is text that describes the target such as “10,000 Green Jobs”. 10,000 is the target and “Green Jobs” is the target label. This field allows for 20 characters of text. This field also only allows text Aa-Zz to be entered. No special characters, commas, dashes of any kind.</p> <p>Typing in this field also begins to change the display for (shown on reports as:)</p>



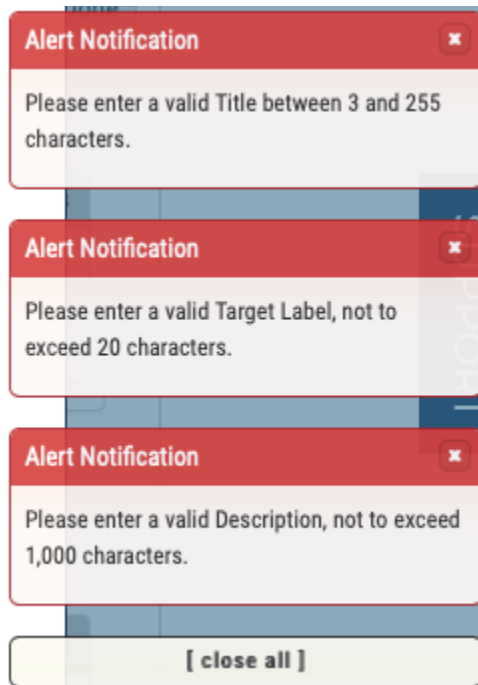
Shown on reports as:	This helper text will guide the user creating a goal to understand how target and target label are going to be used so they can see in reports their entered values will be shown together like “10,000 Green Jobs”.
Fiscal Year	A drop-down menu showing previous 15 years and next 15 years. Default selection is current year.
Goal Reporting Audience:	These checkboxes represent an audience tag you can apply to the goal. Later when reporting on goals, you can filter by these audience tags. These audiences are Public, Pres, Internal / Admin., and Other External.
Description:	Description is a free form text area with 1,000 characters maximum used to describe the goal in greater detail.

## Buttons

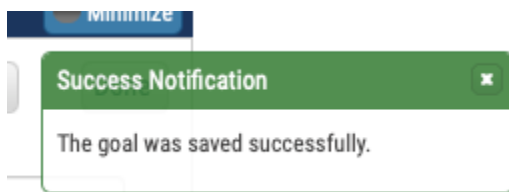
Cancel	Cancel will close the goal modal, and nothing will be saved.
Save	Save will verify and validate the data in the goal modal, save all the choices to the database and close the modal window.
Save & Add	Performs the same function as Save but does not close the modal window, instead it resets the goal modal to a default view where another new goal can be added.

## Validations

Upon saving a goal, the form will immediately attempt to validate that all the required fields have values and that they have the correct values and limits. If there are any omissions that prevent saving, on screen messaging will indicate to the user what is expected.



If no errors are present in the form, the goal should be saved, and the user will be presented with a confirmation of success.





## Viewing Goals (read-only)

By default, the view that displays the goals is in a 'read-only' type of view. Once you've created a few goals, you will see a single data table representing all project goals.

### Standalone Goal View

Project Goals Minimize

Add Goal Edit

Goals

5 goals displayed Search:

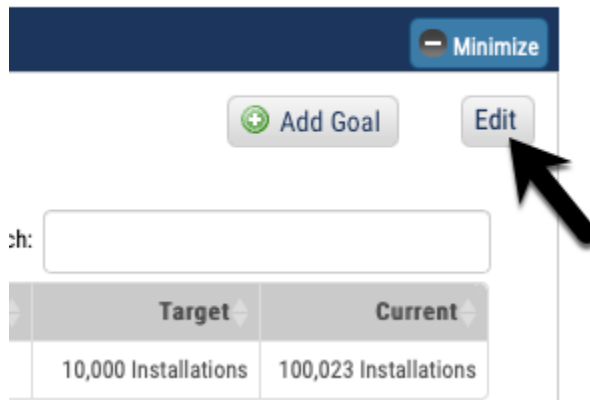
Type	Title	Description	Year	Target	Current
Outcome	<b>Create Community School Park program for 2,000 citizens</b>	Establish a new Community School Park program with the Los Angeles Unified School District (LAUSD) and other partners to increase access to playgrounds and open space for 200,000 citizens. For this project, our target is 2,000 citizens.	2020	2,000 Citizens	0 Citizens
Outcome	Hire 2 Full-Time Park Rangers	Hire 2 Full-Time Park Rangers	2020	2 Rangers	0 Rangers

Showing 1 to 2 of 2 goals \* Bold title designates contributing goals ← Previous 1 Next →



## Goals Edit View

If you need to make changes to existing goals, you must first enter “Edit View” by clicking the “Edit” button in the upper right corner of the goals view.



Clicking the “Edit” button will change the view of all the goals from a read-only view to an edit view. There are new columns and links in the view and data tables.

Project Goals Minimize

Show Archived? Add Goal Done

Goals

5 goals displayed Search:

Type	Title	Description	Year	Target	Current	Actions
Outcome	<b>Create Community School Park program for 2,000 citizens</b>	Establish a new Community School Park program with the Los Angeles Unified School District (LAUSD) and other partners to increase access to playgrounds and open space for 200,000 citizens. For this project, our target is 2,000 citizens.	2020	2,000 Citizens	0 Citizens	
Outcome	<b>Hire 2 Full-Time Park Rangers</b>	Hire 2 Full-Time Park Rangers	2020	2 Rangers	0 Rangers	

Showing 1 to 2 of 2 goals \* Bold title designates contributing goals ← Previous 1 Next →



Buttons

Show Archived?	This checkbox will change the edit view from one that currently shows active goals into one that shows only archived goals. It will toggle from active to archived goals reloading the view.
Add Goal	Performs the same function as adding a goal
Done	Exits the view out of "Edit" mode and back to "Read-Only" view showing "active" goals.

Display

Hyperlinks

Goal titles as well as bold typed goals are hyperlinks for editing. Clicking the link will open the goals modal making it possible to edit all the goal information.

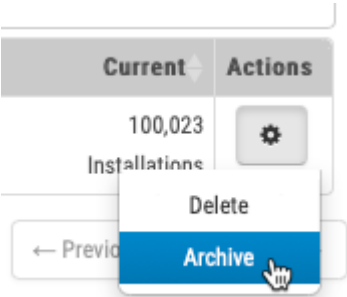
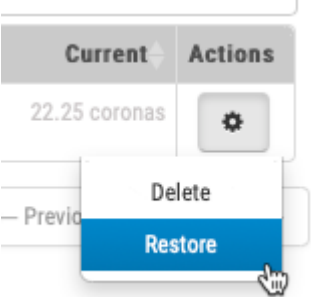
If you mouse-over bold typed goal titles (whether in Edit mode or not) you'll get a pop-over of parent-goal information that the goal is reporting up to.

Type	Title	Description	Year	Target	Current	Actions
Outcome	<b>Create Community School Park program for 2,000 citizens</b>	Establish a new Community School Park program with the Los Angeles Unified School District (LAUSD) and other partners to increase access to playgrounds and open space for 200,000 citizens.	2020	2,000 Citizens	0 Citizens	[Edit]
		our target is 2,000 citizens.				
		signates contributing goals	2020	2 Rangers	0 Rangers	[Edit]

Parent Goal Information			
Title	Description		
Create Community School Park	Establish a new Community School Park program with the Los Angeles Unified School District (LAUSD) and other partners to increase access to playgrounds and open space for 200,000 citizens.		
Type	Year	Target	Current
Outcome	2020	200,000 Citizens	0.00 Citizens



Actions Column	<p>This new column on the data table is a drop-down menu button of choices that can be performed on a given goal. The choices, in the active goals edit view are Delete and Archive as seen here.</p>  <p>When you are viewing Archived goals, the choices instead here are Delete and Restore.</p> 
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## Actions

### *Delete Goal*

From the “Actions” menu, you can choose to **Delete** a goal but, you will only be successful at deleting a goal so long as it meets certain criteria. To successfully delete a goal, the goal:





- Must not be linked to any other goals. For example, a Project goal cannot be deleted if there is a Project-Grant goal linking (through Reports To and Parent Goal) to the goal you are trying to delete.
- If a goal has no links to other goals, the goal cannot be deleted if the goal has current progress being reported to the goal (from metrics)

Attempts to delete a goal where links or progress is recorded will stop the deletion and the user will get a red error notice “This goal can't be deleted. It has reported progress. You can only archive this goal.”

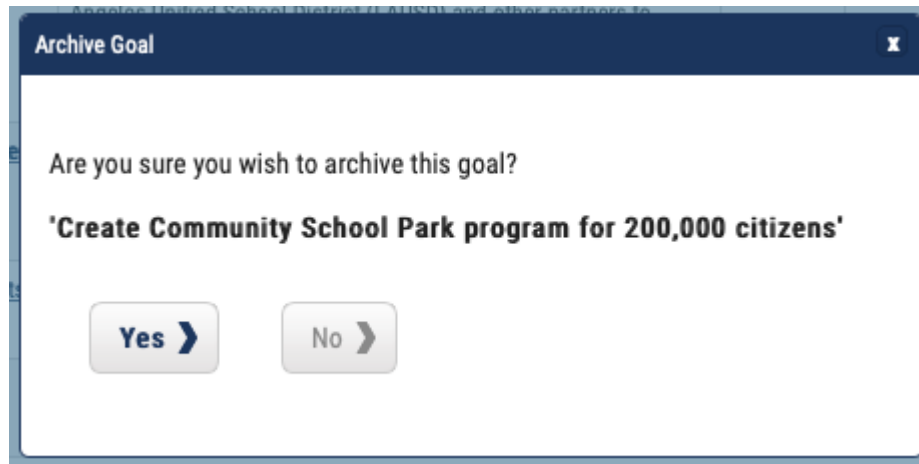
If a goal can be successfully deleted, it is a ‘soft delete’ and not permanently deleted from our system. Restoring a deleted goal however will require the assistance of the SE team / Customer Success.

Deleted goals disappear from Grants Network and are not accessible via reports. The system will also provide a confirmation message that the goal was successfully deleted.

### *Archive Goal*

From the “Actions” menu, you can choose to **Archive** a goal. Performing an archive is relatively simple and removes the goal from an ‘active’ status to an ‘archived’ status. Archived goals are still accessible by users by clicking on the “Show Archived?” checkbox.

Customers will receive a confirmation dialog whenever trying to archive a goal.



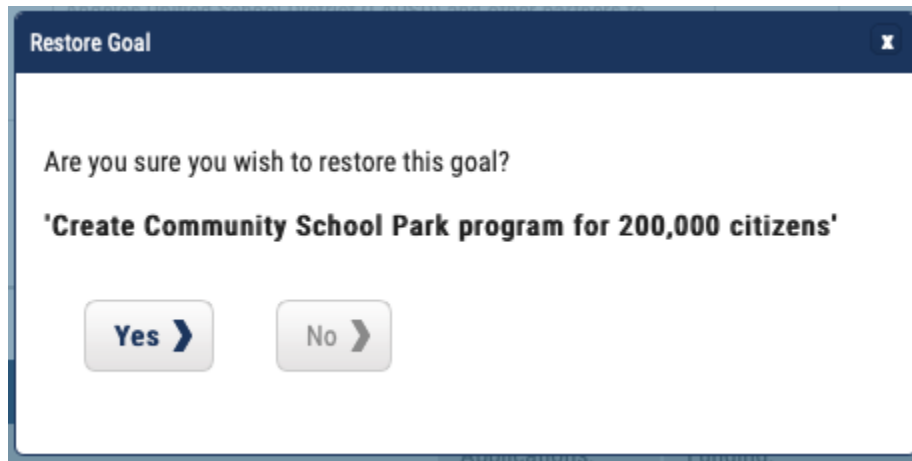
When a goal is archived, the status of the goal is changed and put into the archive view. There are no special rules about archiving. For now, when a goal is archived, if it has recorded progress and it reports up to a parent goal the value of the current progress of the parent goal is not adjusted in any way. This behavior could change in the future.

Archived goals do not show up on active dashboards unless you choose to “Show Archived?” and archived goals also do not show up on reports. The system will provide a confirmation message that the goal was successfully archived.

### *Restore Goal*

From the “Actions” menu (in “Show Archived” view), you can choose to **Restore** a goal. Performing a restore simply moves the archived goal to an “active” status. It’s relatively easy to archive and restore a goal. Restored goals show up in the normal “active” view in dashboards.

Customers will receive a confirmation dialog whenever trying to restore a goal.



The system will provide a confirmation message that the goal was successfully restored.



## Editing a Goal

**Edit Project Goal**

Instructions: Complete the form to edit this goal for your project.

Title: \* Create Community School Park program for 2,000 citizens 200 Characters Left

Reports To: \*  Organization  Department  None

Parent Goal: Create Community School Park program for 200,000 citizens

Type: \* Outcome Target: \* 2,000 Target Label: \* Citizens  
*(shown on reports as: 2,000 Citizens)*

Fiscal Year: \* 2020 Goal Reporting Audience:  Public  Internal / Admin.  
 Press  Other External

Description: \* Establish a new Community School Park program with the Los Angeles Unified School District (LAUSD) and other partners to increase access to playgrounds and open space for 200,000 citizens. For this project, our target is 2,000 citizens. 763 Characters Left

When you click a hyperlink for a goal, while in “Edit” mode, you will get a modal dialog much like the one above with all the fields pre-filled with values. All the validation rules will still apply along with the required fields during edit.

### Special Circumstances

There are some special circumstances you need to be aware of when editing a goal.

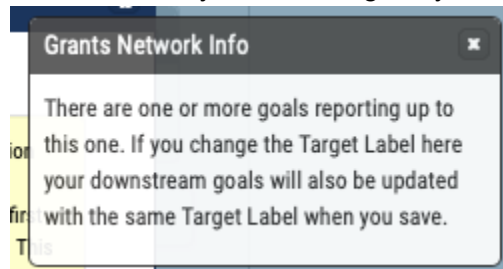
- If you are editing a goal’s “Reports To” or “Parent Goal” fields, and the goal you are editing has metric progress reporting up to this goal and this goal already has a “Reports To:” and “Parent Goal:” values pointing to a different goal or initiative the system will



deduct the current progress for this goal from the old values in the Parent Goal field and add them onto the new value you choose after you save the goal.

- b. As an example, let's say you have 500 citizens worth of progress on your goal and it reports to a parent goal of "Goal A" and you change that value to now point to "Goal B". After save, Goal B will have 500 citizens more progress added, and Goal A will have 500 citizens deducted.
  - c. You must be careful here because this assumes both goals have the same Target Label of "Citizens". When you change the Parent Goal during edit, your Target Label will automatically be changed to support what the parent goal is expecting.
- If you are editing a goal that already has other goals reporting up to the one you are editing and you change the "Target Label" field value, you'll get a warning on the screen letting you know that any changes to the Target Label field will automatically change all the downstream Target Label fields.

- a. As an example, if your goal at an Organization level has a target label of "Citizens" and you Edit the goal, you'll get a warning on the screen



Changing "Citizens" to "Victims" will change the Target Label field value for all the downstream goals that report up to this one such as a Department, Project or Project-Grant goal.



# Project-Grant Goals

Grant Goals & Metrics

CA0322 Bright Schools Program - FY 2016 Minimize

Add Goal Edit

Goals

5 goals displayed Search:

Type	Title	Description	Year	Target	Current
Goal	Create 5 Energy Audits and Feasibility Studies	Energy audits and feasibility studies contractually required by the grant. We've agreed to create 5 reports total that combine energy audits and feasibility studies together.	2020	5 Reports	0 Reports
Outcome	<b>Create Community School Park program for 500 Citizens</b>	Within this grant we've been awarded, we can work toward creating a new community school park program for 500 citizens to support our project goal.	2020	500 Citizens	0 Citizens

Showing 1 to 2 of 2 goals \* Bold title designates contributing goals ← Previous 1 Next →

No grant metrics have been created for this grant yet. Would you like to start?

Grant metrics are the typical stand-alone performance reporting component for grants often required to meet contractual obligations to report back to the funding agency. Here, grant metrics can also be tied to other organization, department and project goals for transparent roll-up reporting to show how grant funds are meeting the needs of the organization.

Create Metrics

No charts are available for this grant yet.

Charts are only created once metrics have been created for a grant, and progress has been recorded.

(shown with some basic Project goals, and one contributing goal in bold)

## Overview

On the Goals & Metrics from the Project dashboard is a new expandable and collapsible widget for "Grant Goals & Metrics" as seen above, expanded. When goals are present, the view will



show in alphabetical order the project-grant goals, including those goals that contribute up to project, department or organization goals (in bold). The goal in bold is a project-grant goal that reports up to a project goal. When you mouse-over bold goals, you will get a pop-over to indicate what the parent goal is and related information.

Project-grant goals are identical in display and function as Project, and Department Goals. The Project-grant goals table is a flat table in structure. The data table does have the tools to sort columns, keyword search for specific goals, adjust the number of goals being displayed as well as 'previous' and 'next' navigation buttons when more goals are created in the department.

What is unique about project-grant goals display is that it includes 3 sections in the same widget: Goals, Metrics, and Charts (from top to bottom).



## No Project-Grant Goals

When a project-grant is first starting, they won't see the data tables and goals because they haven't created it yet. When they open the Project-grant goals widget they will see this.

Grant Goals & Metrics

CA0322 Bright Schools Program - FY 2016 Minimize

No grant goals have been created for this grant yet. Would you like to start?

Grant goals are desired outcomes and contractual grant performance measurement requirements. These goals can also contribute to your project, department and organization goals. Performance reporting on goal and metric progress will roll back up to the top for organization wide reporting.

[Create Goals](#)

No grant metrics have been created for this grant yet. Would you like to start?

Grant metrics are the typical stand-alone performance reporting component for grants often required to meet contractual obligations to report back to the funding agency. Here, grant metrics can also be tied to other organization, department and project goals for transparent roll-up reporting to show how grant funds are meeting the needs of the organization.

[Create Metrics](#)

No charts are available for this grant yet.

Charts are only created once metrics have been created for a grant, and progress has been recorded.

*(shown with no goals present)*





## Create Goals

Clicking on the Create Goals button will show the user a new popup for creating a goal. This popup is commonly used for creating goals at the Organization, Department, Project and Project-grant level but there are a few subtle changes based on where you are creating a goal.

**Add Project-Grant Goal**

Instructions: Complete the form to add a goal for your project-grant.

Title: \*  255 characters left

Reports To: \*  Organization  Department  Project  None

Parent Goal:

Type: \*  Target: \*  Target Label: \*   
(shown on reports as: 0)

Fiscal Year: \*  Goal Reporting Audience:  Public  Internal / Admin.  
 Press  Other External

Description: \*  1000 characters left

Creating grant goals is essential for helping to meet contractual obligations for the grant funds you receive. Performance metrics can be created and associated with your project grant goals to report transparent progress. Your grant goals can be associated your project, department and organization goals using 'Reports To' and 'Parent Goal'. This allows your grant goal to transparently contribute to top level initiatives for reporting in your organization.

## Fields & Display

Title:	The title of the goal, a 255-character limit
Reports To:	Radio button selection indicating how to relate this new goal to one that already exists. At the Project-grant level, you could choose Project, Department, Organization, or None. This choice helps you build a



	parent/child relationship between project-grant, project, department & organization goals. Making a choice other than None here will enable the next field "Parent Goal"
Parent Goal:	Disabled by default, if a choice (other than None) is made in Reports To, this drop-down list will populate with goals to build a parent/child relationship between goals such as organization child-goals (found under initiatives) or department goals. At the project-grant level here, the only goals that will show in this drop-down are goals that are child-goals to an organization initiative, department, or project goal depending on what you choose in Reports To.
Type:	<p>The type of goal this is, drop-down choices are: Objective, Priority, Goal, Output, Outcome, Other. (Goal is the default)</p> <p>You will not see an option for "Initiative" here at the project level, that is only reserved for Organization goals.</p> <p>If "Other" is picked, a new text field appears, below type, with a label of "Custom Type" limited to 20 characters. Allowing someone to create a custom type of goal not listed in the drop-down.</p>
Target:	<p>Target is a numerical value we wish to achieve by this goal. This field only allows numbers to be typed with a max value of 9,999,999.</p> <p>Typing in this field also begins to change the display for (shown on reports as:)</p>
Target Label:	Target label is text that describes the target such as "10,000 Green Jobs". 10,000 is the target and "Green Jobs" is the target label. This field allows for 20 characters of text. This field also only allows text Aa-Zz to be entered. No special characters, commas, dashes of any kind.



	Typing in this field also begins to change the display for (shown on reports as:)
Shown on reports as:	This helper text will guide the user creating a goal to understand how target and target label are going to be used so they can see in reports their entered values will be shown together like “10,000 Green Jobs”.
Fiscal Year	A drop-down menu showing previous 15 years and next 15 years. Default selection is current year.
Goal Reporting Audience:	These checkboxes represent an audience tag you can apply to the goal. Later when reporting on goals, you can filter by these audience tags. These audiences are Public, Pres, Internal / Admin., and Other External.
Description:	Description is a free form text area with 1,000 characters maximum used to describe the goal in greater detail.

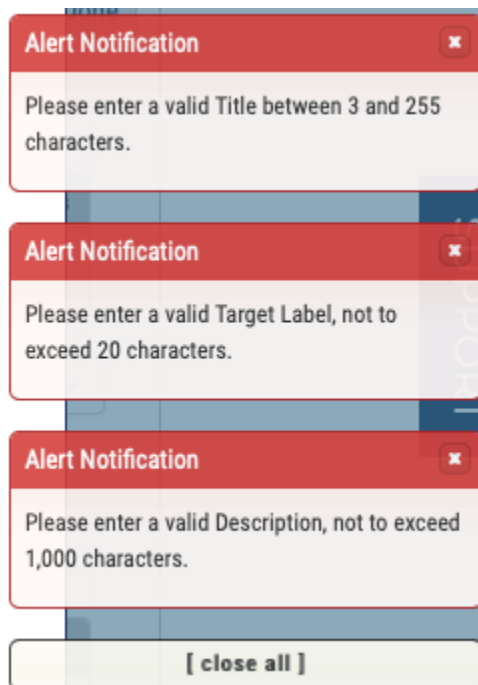
## Buttons

Cancel	Cancel will close the goal modal, and nothing will be saved.
Save	Save will verify and validate the data in the goal modal, save all the choices to the database and close the modal window.
Save & Add	Performs the same function as Save but does not close the modal window, instead it resets the goal modal to a default view where another new goal can be added.

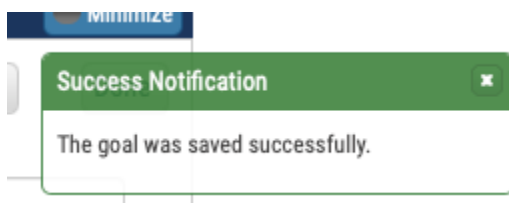


## Validations

Upon saving a goal, the form will immediately attempt to validate that all the required fields have values and that they have the correct values and limits. If there are any omissions that prevent saving, on screen messaging will indicate to the user what is expected.



If no errors are present in the form, the goal should be saved, and the user will be presented with a confirmation of success.





## Viewing Goals (read-only)

By default, the view that displays the goals is in a 'read-only' type of view. Once you've created a few goals, you will see a single data table representing all project-grant goals.

### Standalone Goal View

Grant Goals & Metrics

CA0322 Bright Schools Program - FY 2016 Minimize

Add Goal Edit

Goals

5 goals displayed Search:

Type	Title	Description	Year	Target	Current
Goal	Create 5 Energy Audits and Feasibility Studies	Energy audits and feasibility studies contractually required by the grant. We've agreed to create 5 reports total that combine energy audits and feasibility studies together.	2020	5 Reports	0 Reports
Outcome	<b>Create Community School Park program for 500 Citizens</b>	Within this grant we've been awarded, we can work toward creating a new community school park program for 500 citizens to support our project goal.	2020	500 Citizens	0 Citizens

Showing 1 to 2 of 2 goals \* Bold title designates contributing goals ← Previous 1 Next →

No grant metrics have been created for this grant yet. Would you like to start?

Grant metrics are the typical stand-alone performance reporting component for grants often required to meet contractual obligations to report back to the funding agency. Here, grant metrics can also be tied to other organization, department and project goals for transparent roll-up reporting to show how grant funds are meeting the needs of the organization.

Create Metrics

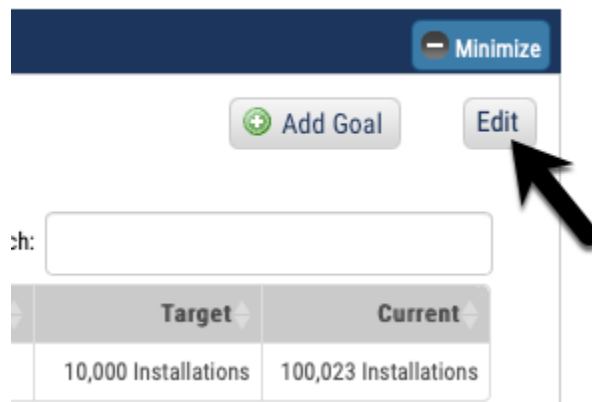
No charts are available for this grant yet.

Charts are only created once metrics have been created for a grant, and progress has been recorded.



## Goals Edit View

If you need to make changes to existing goals, you must first enter “Edit View” by clicking the “Edit” button in the upper right corner of the goals view.



Clicking the “Edit” button will change the view of all the goals from a read-only view to an edit view. There are new columns and links in the view and data tables.



## Grant Goals & Metrics

CA0322 Bright Schools Program - FY 2016 Minimize

Show Archived? Add Goal Done

Goals

5 goals displayed Search:

Type	Title	Description	Year	Target	Current	Actions
Goal	<a href="#">Create 5 Energy Audits and Feasibility Studies</a>	Energy audits and feasibility studies contractually required by the grant. We've agreed to create 5 reports total that combine energy audits and feasibility studies together.	2020	5 Reports	0 Reports	
Outcome	<b><a href="#">Create Community School Park program for 500 Citizens</a></b>	Within this grant we've been awarded, we can work toward creating a new community school park program for 500 citizens to support our project goal.	2020	500 Citizens	0 Citizens	

Showing 1 to 2 of 2 goals \* Bold title designates contributing goals ← Previous 1 Next →

No grant metrics have been created for this grant yet. Would you like to start?

Grant metrics are the typical stand-alone performance reporting component for grants often required to meet contractual obligations to report back to the funding agency. Here, grant metrics can also be tied to other organization, department and project goals for transparent roll-up reporting to show how grant funds are meeting the needs of the organization.

Create Metrics

No charts are available for this grant yet.

Charts are only created once metrics have been created for a grant, and progress has been recorded.

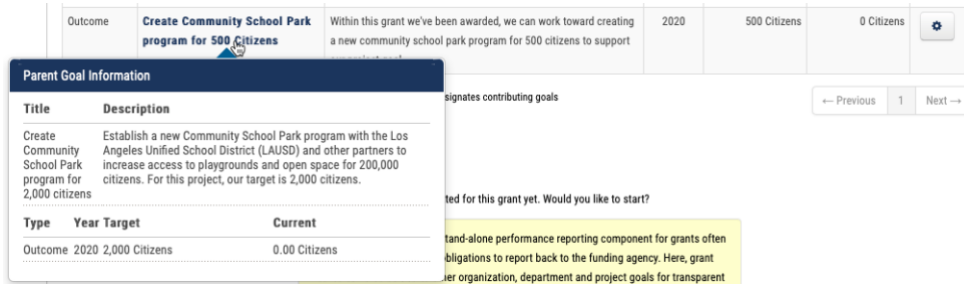
## Buttons

Show Archived?	This checkbox will change the edit view from one that currently shows active goals into one that shows only archived goals. It will toggle from active to archived goals reloading the view.
----------------	----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------



Add Goal	Performs the same function as adding a goal
Done	Exits the view out of “Edit” mode and back to “Read-Only” view showing “active” goals.

## Display

Hyperlinks	<p>Goal titles as well as bold typed goals are hyperlinks for editing. Clicking the link will open the goals modal making it possible to edit all the goal information.</p> <p>If you mouse-over bold typed goal titles (whether in Edit mode or not) you’ll get a pop-over of parent-goal information that the goal is reporting up to.</p> 
Actions Column	This new column on the data table is a drop-down menu button of choices that can be performed on a given goal. The choices, in the active goals edit view are Delete and Archive as seen here.





When you are viewing Archived goals, the choices instead here are Delete and Restore.

## Actions

### *Delete Goal*

From the “Actions” menu, you can choose to **Delete** a goal but, you will only be successful at deleting a goal so long as it meets certain criteria. To successfully delete a goal, the goal:

- If a goal has no links to other goals, the goal cannot be deleted if the goal has current progress being reported to the goal (from metrics)



Attempts to delete a goal where links or progress is recorded will stop the deletion and the user will get a red error notice “This goal can't be deleted. It has reported progress. You can only archive this goal.”

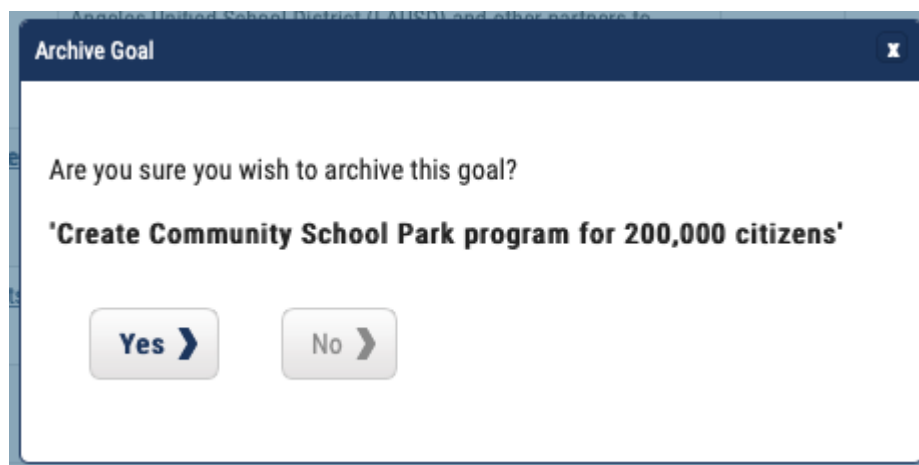
If a goal can be successfully deleted, it is a ‘soft delete’ and not permanently deleted from our system. Restoring a deleted goal however will require the assistance of the SE team / Customer Success.

Deleted goals disappear from Grants Network and are not accessible via reports. The system will also provide a confirmation message that the goal was successfully deleted.

### *Archive Goal*

From the “Actions” menu, you can choose to **Archive** a goal. Performing an archive is relatively simple and removes the goal from an ‘active’ status to an ‘archived’ status. Archived goals are still accessible by users by clicking on the “Show Archived?” checkbox.

Customers will receive a confirmation dialog whenever trying to archive a goal.





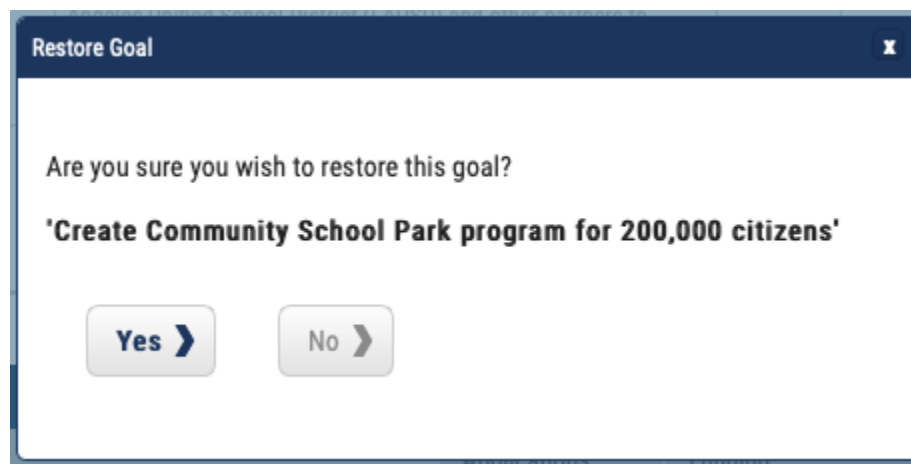
When a goal is archived, the status of the goal is changed and put into the archive view. There are no special rules about archiving. For now, when a goal is archived, if it has recorded progress and it reports up to a parent goal the value of the current progress of the parent goal is not adjusted in any way. This behavior could change in the future.

Archived goals do not show up on active dashboards unless you choose to “Show Archived?” and archived goals also do not show up on reports. The system will provide a confirmation message that the goal was successfully archived.

### *Restore Goal*

From the “Actions” menu (in “Show Archived” view), you can choose to **Restore** a goal. Performing a restore simply moves the archived goal to an “active” status. It's relatively easy to archive and restore a goal. Restored goals show up in the normal “active” view in dashboards.

Customers will receive a confirmation dialog whenever trying to restore a goal.





The system will provide a confirmation message that the goal was successfully restored.

## Editing a Goal

**Edit Project-Grant Goal**

Instructions: Complete the form to edit this goal for your project-grant.

Title: \* Create Community School Park program for 500 Citizens 202 Characters Left

Reports To: \*  Organization  Department  Project  None

Parent Goal: Create Community School Park program for 2,000 citizens

Type: \* Outcome Target: \* 500 Target Label: \* Citizens  
*(shown on reports as: 500 Citizens)*

Fiscal Year: \* 2020 Goal Reporting Audience:  Public  Internal / Admin.  
 Press  Other External

Description: \* Within this grant we've been awarded, we can work toward creating a new community school park program for 500 citizens to support our project goal. 853 Characters Left

**Creating grant goals is essential for helping to meet contractual obligations for the grant funds you receive. Performance metrics can be created and associated with your project grant goals to report transparent progress. Your grant goals can be associated your project, department and organization goals using 'Reports To' and 'Parent Goal'. This allows your grant goal to transparently contribute to top level initiatives for reporting in your organization.**

When you click a hyperlink for a goal, while in “Edit” mode, you will get a modal dialog much like the one above with all the fields pre-filled with values. All the validation rules will still apply along with the required fields during edit.

### Special Circumstances

There are some special circumstances you need to be aware of when editing a goal.

- If you are editing a goal’s “Reports To” or “Parent Goal” fields, and the goal you are editing has metric progress reporting up to this goal and this goal already has a “Reports To:” and “Parent Goal:” values pointing to a different goal or initiative the system will



deduct the current progress for this goal from the old values in the Parent Goal field and add them onto the new value you choose after you save the goal.

- b. As an example, let's say you have 500 citizens worth of progress on your goal and it reports to a parent goal of "Goal A" and you change that value to now point to "Goal B". After save, Goal B will have 500 citizens more progress added, and Goal A will have 500 citizens deducted.
- c. You must be careful here because this assumes both goals have the same Target Label of "Citizens". When you change the Parent Goal during edit, your Target Label will automatically be changed to support what the parent goal is expecting.



# Metrics

Grant Goals & Metrics

CA0322 Bright Schools Program - FY 2016 Minimize

[Add Goal](#) [Edit](#)

Goals

5 goals displayed Search:

Type	Title	Description	Year	Target	Current
Goal	Create 5 Energy Audits and Feasibility Studies	Energy audits and feasibility studies contractually required by the grant. We've agreed to create 5 reports total that combine energy audits and feasibility studies together.	2020	5 Reports	0 Reports
Outcome	<b>Create Community School Park program for 500 Citizens</b>	Within this grant we've been awarded, we can work toward creating a new community school park program for 500 citizens to support our project goal.	2020	500 Citizens	0 Citizens

Showing 1 to 2 of 2 goals \* **Bold** title designates contributing goals ← Previous 1 Next →

[Add Metric](#) [Edit](#)

Metrics

5 metrics displayed Search:

Metric	Target	Current	Progress	As Of	Performance Period	Assigned To	Files	Notes	History
Increase student participation in parks education programs by 20,000 students	20,000 Students	0 Students	0.00%	05/22/2020	07/01/2020 - 07/31/2021	Standard			
<b>Install 500 new outdoor security lights</b>	500 Lights	0 Lights	0.00%	05/22/2020	07/01/2020 - 07/31/2021	R. Sherman			

Showing 1 to 2 of 2 metrics \* **Bold** title designates contributing metrics ← Previous 1 Next →

No charts are available for this grant yet.

Charts are only created once metrics have been created for a grant. and

(shown with some basic Metrics, and one contributing metric in bold)



## Overview

On the Goals & Metrics from the Project dashboard is a new expandable and collapsible widget for “Grant Goals & Metrics” as seen above, expanded. When metrics are present, the view will show in alphabetical order the project-grant metrics, including those metrics that contribute up to project, department or organization goals (in bold). The metric in bold is a project-grant metric that reports up to a project goal. When you mouse-over bold metrics, you will get a pop-over to indicate what the parent goal is and related information.

What makes Metrics so powerful is that they can now be associated (through Reports To) to any goal in a silo from the project-grant goal on up to organization goals. Just like goal relationships, metrics can only report to goals in a silo - meaning this project-grant, this project, this department’s goals and this organization. A metric in one department’s project-grant cannot report to a goal in another department or another department’s projects or project-grants.

Metrics are now a critical piece to successfully create transparent roll-up reporting across the enterprise. With metrics linked (through Reports To/Parent Goal) to goals, we can now report ongoing progress transparently and instantly.

Metrics have a similar display as their goal counterparts. The metrics table is a flat table in structure. The data table does have the tools to sort columns, keyword search for specific goals, adjust the number of goals being displayed as well as ‘previous’ and ‘next’ navigation buttons when more goals are created in the department.

What is unique about project-grant goals display is that it includes 3 sections in the same widget: Goals, Metrics, and Charts (from top to bottom).



## No Metrics

When a project-grant is first starting, they won't see the data tables and metrics because they haven't created it yet. When they open the Project-grant goals widget they will see this if goals are present, but metrics and charts are not.

Grant Goals & Metrics

CA0322 Bright Schools Program - FY 2016 Minimize

Add Goal Edit

Goals

5 goals displayed Search:

Type	Title	Description	Year	Target	Current
Goal	Create 5 Energy Audits and Feasibility Studies	Energy audits and feasibility studies contractually required by the grant. We've agreed to create 5 reports total that combine energy audits and feasibility studies together.	2020	5 Reports	0 Reports
Outcome	<b>Create Community School Park program for 500 Citizens</b>	Within this grant we've been awarded, we can work toward creating a new community school park program for 500 citizens to support our project goal.	2020	500 Citizens	0 Citizens

Showing 1 to 2 of 2 goals \* Bold title designates contributing goals ← Previous 1 Next →

No grant metrics have been created for this grant yet. Would you like to start?

Grant metrics are the typical stand-alone performance reporting component for grants often required to meet contractual obligations to report back to the funding agency. Here, grant metrics can also be tied to other organization, department and project goals for transparent roll-up reporting to show how grant funds are meeting the needs of the organization.

Create Metrics

No charts are available for this grant yet.

Charts are only created once metrics have been created for a grant, and progress has been recorded.

(shown with no metrics present)





## Create Metrics

Clicking on the Create Metrics button will show the user a new popup for creating a metric that is very different from legacy metrics. This popup is commonly used for creating metrics at the Project-grant level.

**Add Metrics**

Instructions: Complete the form to add a metric.

Metric Name: \*  150 characters left

Reports To: \*  Organization  Department  Project  Grant  None

Parent Goal:  Goal Type: Goal Target: 0.00

Metric Target: \*  Label: \*  (shown on reports as: 0)

Performance Period: \*   To: \*

Assigned To: \*

Completed Units: \*  Completed?  Manage Files

Date Completed: \*   (0.00 current completed total)

Notes: \*  1000 characters left

You should associate your grant metric to a project, department or organization goal to commit, and contribute progress that will roll up for organization wide reporting.


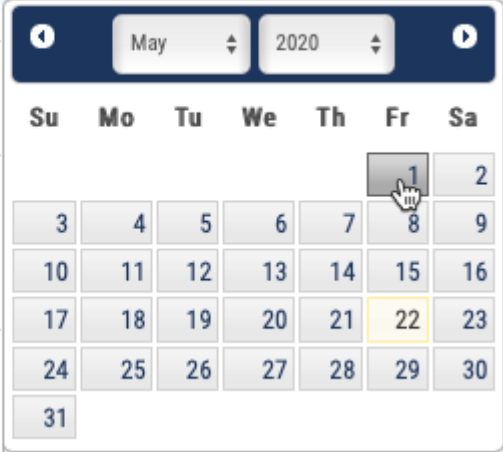
## Fields & Display

Metric Name:	The title of the metric, a 150-character limit
--------------	------------------------------------------------



Reports To:	Radio button selection indicating how to relate this new metric to a goal that already exists. At the Project-grant level, you could choose Grant, Project, Department, Organization, or None. This choice helps you build a parent/child relationship between project-grant, project, department & organization goals. Making a choice other than None here will enable the next field "Parent Goal"
Parent Goal:	Disabled by default, if a choice (other than None) is made in Reports To, this drop-down list will populate with goals to build a parent/child relationship between goals such as organization child-goals (found under initiatives) or department goals. At the project-grant level here, the only goals that will show in this drop-down are goals that are child-goals to an organization initiative, department, project, or project-grant goals depending on what you choose in Reports To.
Metric Target:	Metric Target is a numerical value we wish to achieve by this metric. This field only allows numbers to be typed with a max value of 9,999,999.  Typing in this field also begins to change the display for (shown on reports as:)
Label:	Label is text that describes the target such as "10,000 Green Jobs". 10,000 is the target and "Green Jobs" is the target label. This field allows for 20 characters of text. This field also only allows text Aa-Zz to be entered. No special characters, commas, dashes of any kind.  Typing in this field also begins to change the display for (shown on reports as:)
Shown on reports as:	This helper text will guide the user creating a goal to understand how target and target label are going to be used so they can see in reports their entered values will be shown together like "10,000 Green Jobs".



<p>Performance Period:</p>	<p>An input for the start date of the performance period in the format of MM/DD/YYYY. Clicking the calendar button will show a calendar picker for the date.</p> <p>Performance Period: * 05/01/2020  To: *</p> <p>Assigned To: *</p> <p>Completed Units: *</p> <p>Date Completed: *</p> <p>Notes: *</p> 
<p>To:</p>	<p>An input for the start date of the performance period in the format of MM/DD/YYYY. Clicking the calendar button will show a calendar picker for the date.</p>
<p>Assigned To:</p>	<p>A drop-down menu that includes project team members but also includes organization user groups. A choice here assigns responsibility for the metric. Values for assignment are largely for reporting purposes currently. There is no workflow associated with assignment at present.</p>
<p>Completed Units:</p>	<p>At creation, it's the amount of completed units that are starting off for this metric. In Edit view, it's the amount of completed units you're adding to the total like an update.</p>
<p>Completed?:</p>	<p>A checkbox for reporting purposes to indicate the metric is completed.</p>
<p>Manage Files:</p>	<p>A button for document management to add/remove files to this metric.</p>



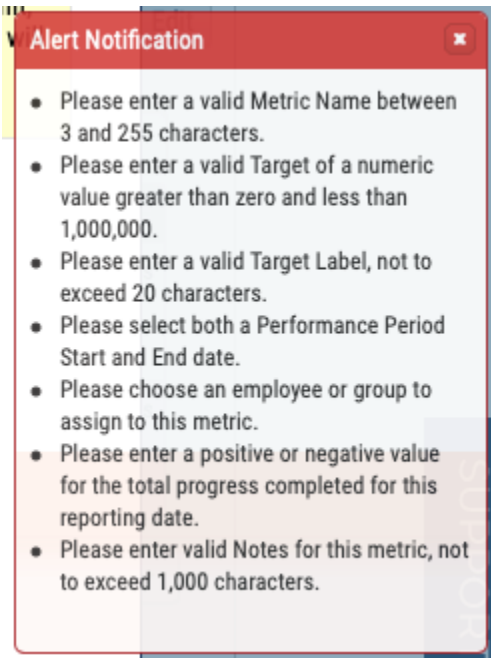
Date Completed:	An input for the start date of completion of the completed units in the format of MM/DD/YYYY. Clicking the calendar button will show a calendar picker for the date.
Notes:	Description is a free form text area with 1,000 characters maximum used to describe the goal in greater detail.

### Buttons

Cancel	Cancel will close the metric modal, and nothing will be saved.
Save	Save will verify and validate the data in the metric modal, save all the choices to the database and close the modal window.
Save & Add	Performs the same function as Save but does not close the modal window, instead it resets the metric modal to a default view where another new metric can be added.

### Validations

Upon saving a metric, the form will immediately attempt to validate that all the required fields have values and that they have the correct values and limits. If there are any omissions that prevent saving, on screen messaging will indicate to the user what is expected.



If no errors are present in the form, the goal should be saved, and the user will be presented with a confirmation of success.





## Viewing Metrics (read-only)

By default, the view that displays the metrics in the middle of the “Grant Goals & Metrics” widget is in a ‘read-only’ type of view. Once you’ve created a few metrics, you will see a single data table representing all project-grant metrics.

### Standalone Metrics View

Grant Goals & Metrics

CA0322 Bright Schools Program - FY 2016 Minimize

+ Add Goal Edit

Goals

5 goals displayed
Search:

Type	Title	Description	Year	Target	Current
Goal	Create 5 Energy Audits and Feasibility Studies	Energy audits and feasibility studies contractually required by the grant. We've agreed to create 5 reports total that combine energy audits and feasibility studies together.	2020	5 Reports	0 Reports
Outcome	<b>Create Community School Park program for 500 Citizens</b>	Within this grant we've been awarded, we can work toward creating a new community school park program for 500 citizens to support our project goal.	2020	500 Citizens	0 Citizens

Showing 1 to 2 of 2 goals ← Previous 1 Next →

\* **Bold** title designates contributing goals

+ Add Metric Edit

Metrics

5 metrics displayed
Search:

Metric	Target	Current	Progress	As Of	Performance Period	Assigned To	Files	Notes	History
Increase student participation in parks education programs by 20,000 students	20,000 Students	0 Students	0.00%	05/22/2020	07/01/2020 - 07/31/2021	Standard			
<b>Install 500 new outdoor security lights</b>	500 Lights	0 Lights	0.00%	05/22/2020	07/01/2020 - 07/31/2021	R. Sherman			

Showing 1 to 2 of 2 metrics ← Previous 1 Next →

\* **Bold** title designates contributing metrics

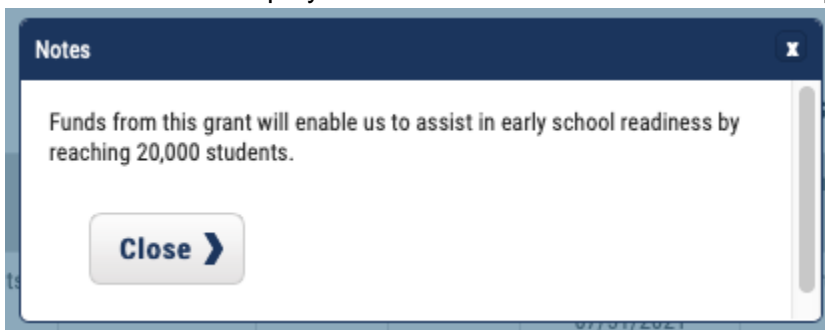


The metrics data table in the middle of the expandable grant widget is very similar to the goal data table with some exceptions. It shows different columns of data such as Progress, As Of, Performance Period and Assigned To. It also features some buttons in read-only view for:

- Files - button to display the files associated with this metric. Files are downloadable.



- Notes - button to display the current note attached to the latest progress for this metric.





- History - button to display the revisions and history for this metric.

**Metric History**

**Install 500 new outdoor security lights**

Metric Progress History

Completed	Percent	Target Value	As Of	Performance Period	Last Updated By	Status	Notes
0 Lights	0%	500 Lights	05/22/2020	07/01/2020 - 07/31/2021	R. Sherman	In Progress	

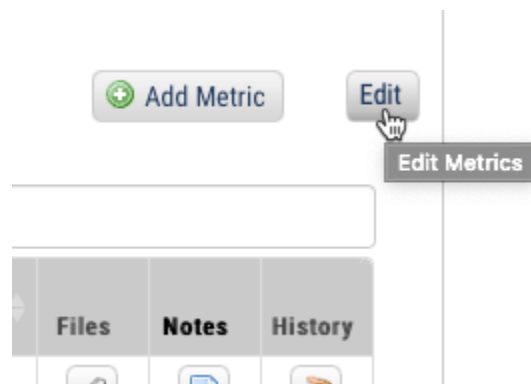
Metric Version History

Metric	Target Value	Performance Period	Assigned To	Last Updated By	Status	As Of	Notes
Install 500 new outdoor security lights	500 Lights	07/01/2020 - 07/31/2021	R. Sherman	R. Sherman	In Progress	05/22/2020	

[Close >](#)

## Metrics Edit View

If you need to make changes to existing metrics you must first enter “Edit View” by clicking the “Edit” button in the upper right corner of the metrics view.







Clicking the “Edit” button will change the view of all the metrics in this grant from a read-only view to an edit view. There are new columns and links in the view and data tables.

Metrics

Show Archived? + Add Metric Done

5 metrics displayed Search:

Metric	Target	Current	Progress	As Of	Performance Period	Assigned To	Files	Notes	History	Actions
<a href="#">Increase student participation in parks education programs by 20,000 students</a>	20,000 Students	0 Students	0.00%	05/22/2020	07/01/2020 - 07/31/2021	Standard				
<b><a href="#">Install 500 new outdoor security lights</a></b>	500 Lights	0 Lights	0.00%	05/22/2020	07/01/2020 - 07/31/2021	R. Sherman				

Showing 1 to 2 of 2 metrics \* **Bold** title designates contributing metrics ← Previous 1 Next →

CA0322 Bright Schools Program – FY 2016 ☰

## Buttons

Show Archived?	This checkbox will change the edit view from one that currently shows active metrics into one that shows only archived metrics. It will toggle from active to archived metrics reloading the view.
Add Metric	Performs the same function as adding a metric
Done	Exits the view out of “Edit” mode and back to “Read-Only” view showing “active” metrics.

## Display

Hyperlinks	Metric titles as well as bold typed metric titles are hyperlinks for editing. Clicking the link will open the metrics modal making it possible to edit all
------------	------------------------------------------------------------------------------------------------------------------------------------------------------------



the metric information.

**NOTE:** An OMAH can create and edit metrics freely. DMAH, and all other users with access to this project can only view the metric and add progress. This is by strict design. OMAH needs to make sure contractual obligations are being met in metrics so security has been tightened to make sure only an OMAH can edit metrics.

If you mouse-over bold typed metric titles (whether in Edit mode or not) you'll get a pop-over of parent-goal information that the metric is reporting up to.

The screenshot shows a table with the following data:

<b>Install 500 new outdoor security lights</b>	500 Lights	0 Lights	0.00%
------------------------------------------------	------------	----------	-------

A mouse cursor is hovering over the bold title. A pop-over window titled "Parent Goal Information" is displayed, containing the following information:

Parent Goal Information	
Title	Description
Install 50,000 outdoor security lights	Install new, and ensure 100% functionality of, 50,000 outdoor security lights

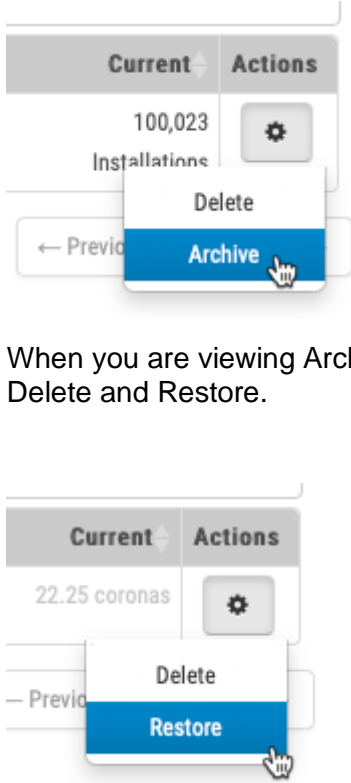
Below this, there is a table with the following data:

Type	Year	Target	Current
Outcome	2020	50,000 Lights	0 Lights

To the right of the pop-over, there is a legend: **\* Bold title designates co**

Actions Column

This new column on the data table is a drop-down menu button of choices that can be performed on a given metric. The choices, in the active metrics edit view are Delete and Archive as seen here.



When you are viewing Archived metrics, the choices instead here are Delete and Restore.

## Actions

### *Delete Metric*

From the “Actions” menu, you can choose to **Delete** a metric but, you will only be successful at deleting a metric so long as it meets certain criteria. To successfully delete a metric:

- If a metric has no links to other goals, the metric cannot be deleted if the metric has current progress being reported to a goal (from metrics)



Attempts to delete a metric where links or progress is recorded will stop the deletion and the user will get a red error notice “This metric can’t be deleted. It has reported progress. You can only archive this metric.”

If a metric can be successfully deleted, it is a ‘soft delete’ and not permanently deleted from our system. Restoring a deleted metric however will require the assistance of the SE team / Customer Success.

Deleted metrics disappear from Grants Network and are not accessible via reports. The system will also provide a confirmation message that the metric was successfully deleted.

### *Archive Metric*

From the “Actions” menu, you can choose to **Archive** a metric. Performing an archive is relatively simple and removes the metric from an ‘active’ status to an ‘archived’ status. Archived metrics are still accessible by users by clicking on the “Show Archived?” checkbox.

Customers will receive a confirmation dialog whenever trying to archive a metric.





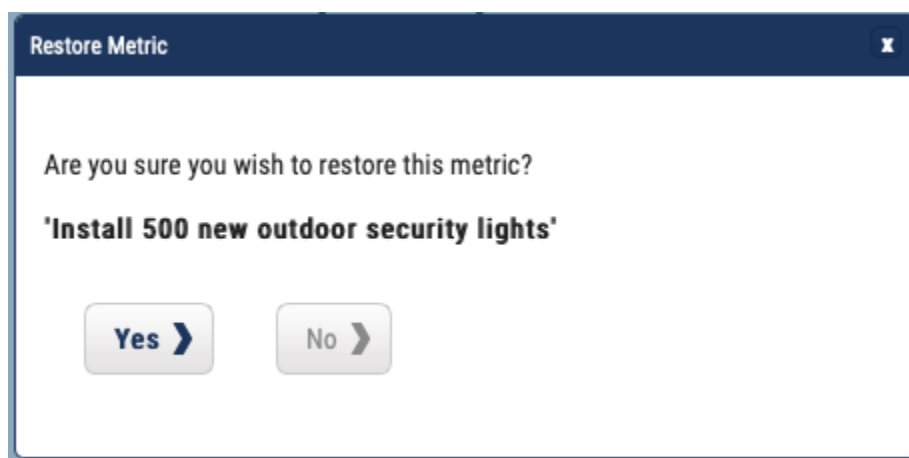
When a metric is archived, the status of the metric is changed and put into the archive view. There are no special rules about archiving. For now, when a metric is archived, if it has recorded progress and it reports up to a parent goal the value of the current progress of the parent goal is not adjusted in any way. This behavior could change in the future.

Archived metrics do not show up on active dashboards unless you choose to “Show Archived?” and archived metrics also do not show up on reports. The system will provide a confirmation message that the metric was successfully archived.

### *Restore Metric*

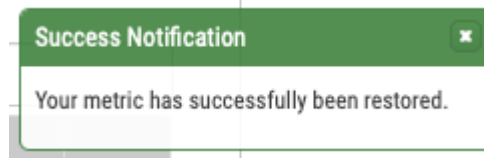
From the “Actions” menu (in “Show Archived” view), you can choose to **Restore** a metric. Performing a restore simply moves the archived metric to an “active” status. It's relatively easy to archive and restore a metric. Restored metrics show up in the normal “active” view in dashboards.

Customers will receive a confirmation dialog whenever trying to restore a metric.





The system will provide a confirmation message that the goal was successfully restored.





## Editing a Metric

Instructions: Complete the form to edit this metric.

Metric Name: \*  111 Characters Left

Reports To: \*  Organization  Department  Project  Grant  None

Parent Goal:  Goal Type: Outcome Goal Target: 50,000 Lights

Metric Target: \*  Label: \*    
*(shown on reports as: 500 Lights)*

Performance Period: \*     
To: \*

Assigned To: \*

Completed Units: \*  Lights Completed?  Manage Files

Date Completed: \*     
*(0.00 Lights current completed total)*

Notes: \*    
928 Characters Left

You should associate your grant metric to a project, department or organization goal to commit, and contribute progress that will roll up for organization wide reporting.

When you click a hyperlink for a metric, while in “Edit” mode (**and you have OMAH permissions**), you will get a modal dialog much like the one above with all the fields pre-filled with values. All the validation rules will still apply along with the required fields during edit.

If the user account that wants to edit a metric is NOT an OMAH, they cannot edit all the field values for a metric. They get a different view.



**Edit Metric**

Instructions: Complete the form to edit this metric.

Metric Name: \* Install 500 new outdoor security lights

Reports To: \* Department

Parent Goal: Install 50,000 outdoor security lights

Goal Type: Outcome Goal Target: 50,000 Lights

Metric Target: \* 500 Lights

Performance Period: \* 07/01/2020 - 07/31/2021

Assigned To: \* Rob Sherman

Completed Units: \* 0 Lights Completed?  Manage Files

Date Completed: \* 05/22/2020 (0.00 Lights current completed total)

Notes: \* Install new, and ensure 100% functionality of, outdoor security lighting

928 Characters Left

**Cancel** **Save**

You should associate your grant metric to a project, department or organization goal to commit, and contribute progress that will roll up for organization wide reporting.

When a user does NOT have organization master account holder (OMAH) permissions, they will see the screen above when trying to edit a metric. This view is designed to allow another user on the project team or department to be able to update progress on the metric but not modify any of the field values due to contractual obligations. The strict security here is by design to avoid non-OMAH users from modifying values like targets and performance periods which may go against contractually agreed upon values and lead to single audit findings.





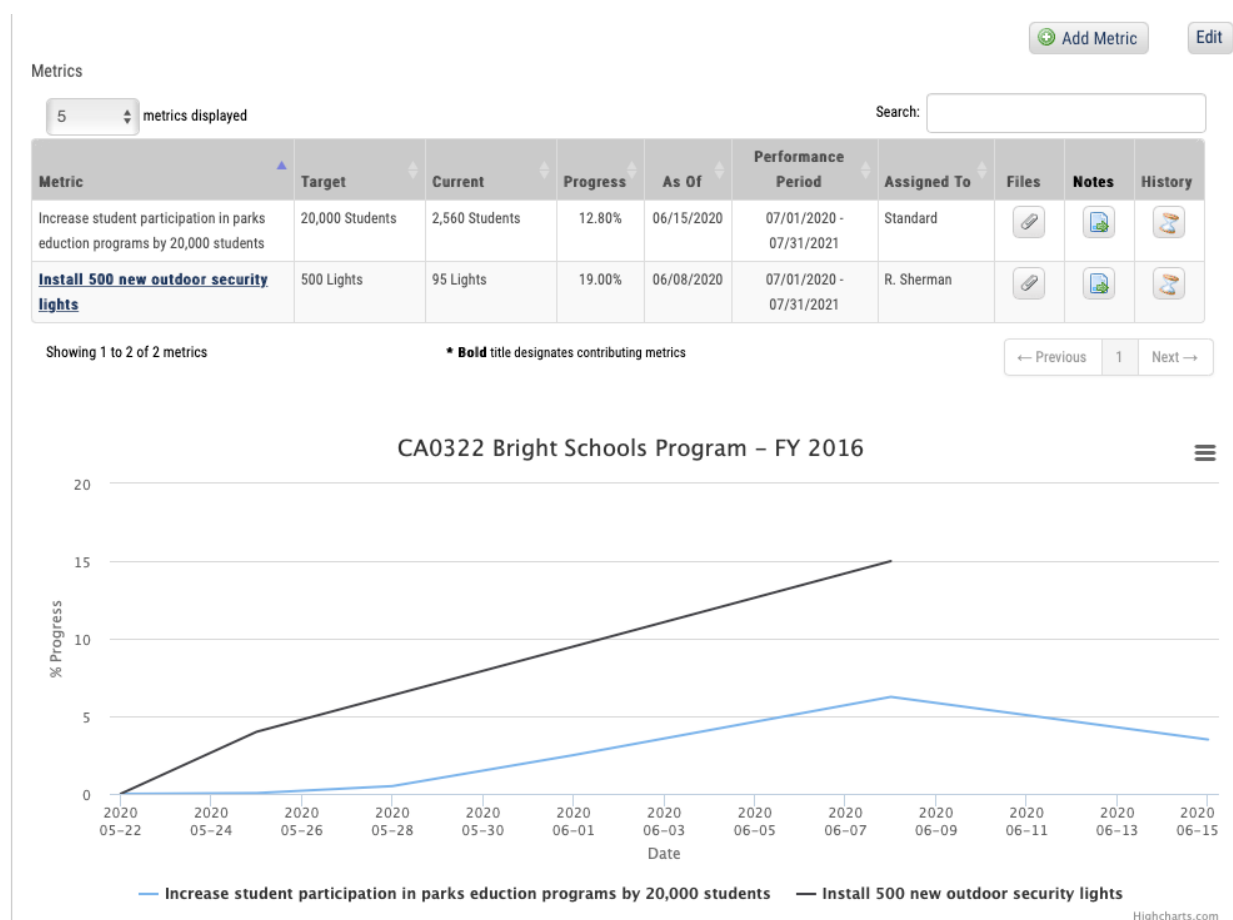
### *Special Circumstances*

There are some special circumstances you need to be aware of when editing a metric.

- If you are editing a metric's "Reports To" or "Parent Goal" fields, and the metric you are editing has metric progress recorded the system will deduct the current progress for this metric from the old values in the Parent Goal field and add them onto the new value you choose after you save the metric.
  - d. As an example, let's say you have 500 citizens worth of progress on your metric and it reports to a parent goal of "Goal A" and you change that value to now point to "Goal B". After save, Goal B will have 500 citizens more progress added, and Goal A will have 500 citizens deducted.
  - e. You must be careful here because this assumes both goals have the same Target Label of "Citizens". When you change the Parent Goal during edit, your Target Label will automatically be changed to support what the parent goal is expecting - even for metrics.



## Metric Chart View

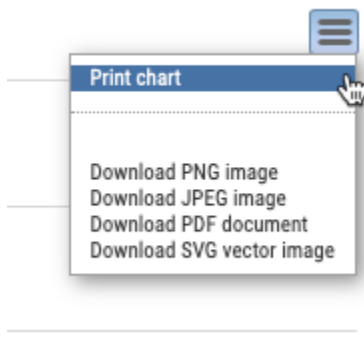


Once you've created some metrics and have added progress to the metrics by going to Edit mode and clicking on the link to update the Completed Unit value and Date, you'll begin to see chart progress appear below the metric section.

The metric chart section is completely automated as metric progress gets recorded. The chart is very interactive. Some options you can take advantage of on the chart are:



- Clicking on the chart legend for a line can turn off/on the line from the chart to help isolate other values
- Clicking on the hamburger menu icon exposes other options for the chart:





## Goal & Metric Reporting

### Overview

The best part about the work that goes into creating goals throughout the Organization, Department, Projects, and Project-grants along with the metrics that report progress on those goals is the goal & metric reporting. Goal & metric reporting consists primarily of two main things: a rich report builder like interface for easily selecting those goals and their underlying metrics you want reports on; and a rich, beautiful excel report now with charts.

In order to get reports working well, the work must be done creating top-down goals and then using metrics to record progress on those goals. Without the metrics recording data, you have listed goals with no progress.

For this section of the documentation, we've created additional goals in our project-grant that reports up to our department and organization goals. We've also created additional metrics on our project-grant and recorded quite a bit of progress across many months.



Add Goal

Edit

Goals

5 goals displayed

Search:

Type	Title	Description	Year	Target	Current
Goal	Create 5 Energy Audits and Feasibility Studies	Energy audits and feasibility studies contractually required by the grant. We've agreed to create 5 reports total that combine energy audits and feasibility studies together.	2020	5 Reports	0 Reports
Outcome	<b>Create Community School Park program for 500 Citizens</b>	Within this grant we've been awarded, we can work toward creating a new community school park program for 500 citizens to support our project goal.	2020	500 Citizens	0 Citizens
Goal	<b>Create park satellite parent support services for 500 parent citizens</b>	Create park satellite parent support services for 500 parent citizens	2020	500 Citizens	0 Citizens
Goal	<b>Provide park &amp; homeless liazon services for 500 homeless to assist with temporary housing</b>	Provide park & homeless liazon services for 500 homeless to assist with temporary housing	2020	500 Citizens	0 Citizens

Showing 1 to 4 of 4 goals

\* **Bold** title designates contributing goals

← Previous 1 Next →

*(project-grant goals that feed up to our department and organization goals)*



Metrics

5 metrics displayed

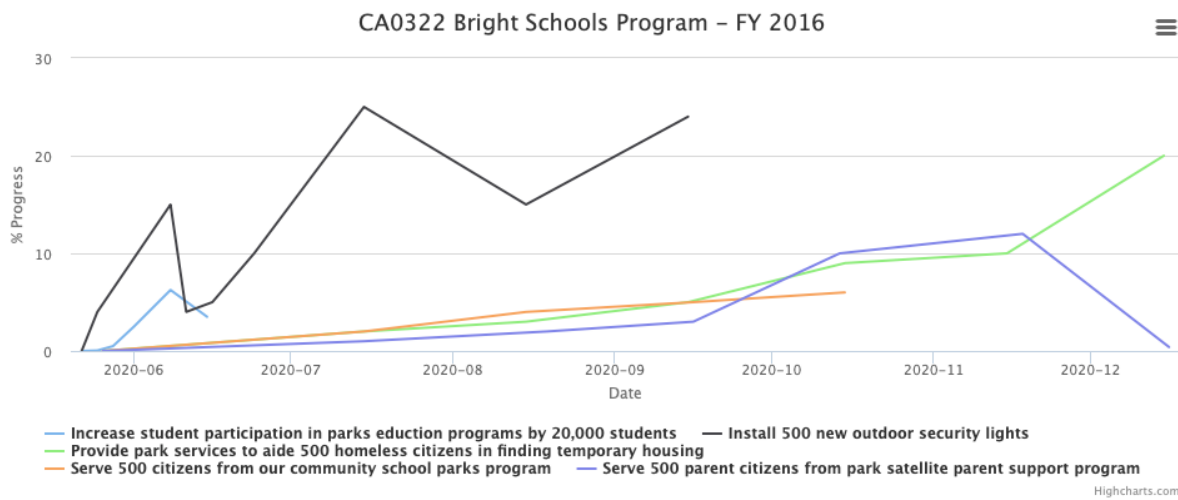
Search:

Metric	Target	Current	Progress	As Of	Performance Period	Assigned To	Files	Notes	History
Increase student participation in parks education programs by 20,000 students	20,000 Students	2,560 Students	12.80%	06/15/2020	07/01/2020 - 07/31/2021	Standard			
<b>Install 500 new outdoor security lights</b>	500 Installations	510 Installations	102.00%	09/15/2020	07/01/2020 - 07/31/2021	R. Sherman			
<b>Provide park services to aide 500 homeless citizens in finding temporary housing</b>	500 Citizens	245 Citizens	49.00%	12/15/2020	07/01/2020 - 07/31/2021	R. Sherman			
<b>Serve 500 citizens from our community school parks program</b>	500 Citizens	85 Citizens	17.00%	10/15/2020	07/01/2020 - 07/31/2021	R. Sherman			
<b>Serve 500 parent citizens from park satellite parent support program</b>	500 Citizens	142 Citizens	28.40%	12/16/2020	07/01/2020 - 07/31/2021	R. Sherman			

Showing 1 to 5 of 5 metrics

\* **Bold** title designates contributing metrics

← Previous 1 Next →



(project-grant metrics with progress recorded over time, as indicated in charts)



# Report Screen

## Organization Goal & Metric Performance

Generate an Excel report of organization and selected department goal & metric performance. Report data based on stated initiatives, goals, outcomes and reported metric progress on project funding.

**Enter Criteria and Generate Report**

Departments	Project Status	Projects
<ul style="list-style-type: none"><li>All Departments</li><li>CBO</li><li>Client Services</li><li>Parks and Rec</li><li>PD</li><li>SRM3 testing</li></ul>	<ul style="list-style-type: none"><li>All</li><li>Open</li></ul> <ul style="list-style-type: none"><li>Goal Fiscal Year</li><li>All</li><li>2005</li><li>2019</li><li>2020</li></ul>	<ul style="list-style-type: none"><li>All Projects</li><li>#3462</li><li>#3462</li><li>2260</li><li>3156-3</li><li>3907</li><li>3908</li><li>3910</li><li>3918 metric test</li><li>3918 metric test #2</li></ul>

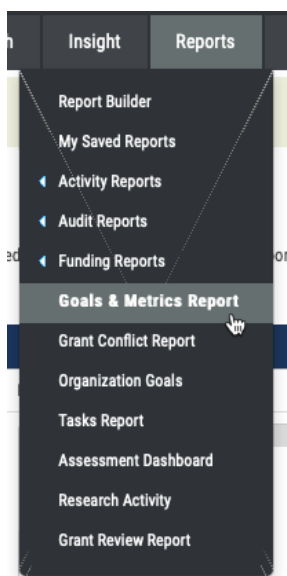
Reporting Audience	Available Goals	Reporting Goals*
<ul style="list-style-type: none"><li>All</li><li>Public</li><li>Press</li><li>Internal / Administration</li><li>Other External</li></ul> <ul style="list-style-type: none"><li>Grant Funding</li><li>All</li><li>California</li><li>Federal</li><li>Florida</li><li>Foundation</li></ul>	<ul style="list-style-type: none"><li>-- Organization Goals -----</li><li>Local Solar - 2020</li><li>- Solar Panel Installations</li><li>Promote Supportive Parenting</li><li>- Expand the outreach of our parenting support programs</li><li>Reduce Homelessness</li><li>- Prevent 10,000 Citizens from Becoming Homeless</li><li>- Provide Interim Housing for 40,000 Homeless</li><li>- Provide Permanent Housing to 40,000 Homeless</li><li>- Reduce Juvenile Recidivism by 2,000</li><li>--- CBO -----</li><li>CBO</li><li>test3</li><li>test3</li><li>test3</li></ul>	

**Generate Report >**



## Overview

The new Goal & Metric report interface is found under a new menu item in Reports as “Goal & Metrics Report”. The reporting screen has many filters that all interact with each other. The best way to review the filters is from top-to-bottom and left-to-right. Each filter offers a way to narrow down the available results to make it easy and fast to report out of the system what it is you’re looking for.







## Report Filters & Display

The best approach to selecting the right goals to report on is to follow this natural flow in selecting filter criteria. Any choice that is made in one of these filters will result in updates to the data in the rest of the filters downstream. For example, choosing a single department will cause updates to project status, fiscal year, projects, reporting audience, grant funding and available goals.

Departments	This filter shows all the departments in the organization that have goals to report on. This includes a department's goals, project goals and project-grant goals. If a department has none of these goals, they will not be listed in this filter to help reduce unnecessary clutter.
Project Status	This filter shows all the available project status for the selected departments which could include: All, Open, and Closed.
Goal Fiscal Year	This filter shows all the available goal fiscal years for the selected departments and project status
Projects	This filter shows all the available projects for the selected departments, project status and fiscal year(s)
Reporting Audience	This filter shows all the available reporting audience choices for the selected previous report filters. Reporting audience is a quick reporting tag placed on goals that can be quickly filtered here. Available choices can include: All, Public, Press, Internal / Admin., Other External
Grant Funding	This filter shows all the available types of grant funding used in the previously selected filters. Options can include: All, Federal, Foundation, and State. State would show the name of the state.
Available Goals	This filter shows all the remaining available goals, from the previously selected filters, that can be selected and moved into the Reporting Goals box using the buttons between this filter and the Reporting Goals box.



Available goals follow a certain format for its display that may take a little getting used to. For starters, no matter what departments or projects you choose, organization goals will always be at the top of the Available Goals box.



In this portion of the goals we can see the following layout:

-- Organization Goals -----

(Initiative #1)

- (Initiative #1 child goal)

(Initiative #2)

- (Initiative #2 child goal)

(etc)

--- (Department Name) -----



**Available Goals**

```
--- Parks and Rec -----  
Create Community School Park program for 200,000 citizens  
Create satellite parent support services in parks to support  
Extend access to park services to aid 5,000 homeless  
Install 50,000 outdoor security lights powered by solar  
Link 100 bike paths along the Los Angeles River  
----- Early School Readiness -----  
Create Community School Park program for 2,000 citizens  
Hire 2 Full-Time Park Rangers  
----- CA0322 Bright Schools Program - FY 2016 -----  
Create 5 Energy Audits and Feasibility Studies  
Create Community School Park program for 500 Citizens  
Create park satellite parent support services for 500 parents  
Provide park & homeless liaison services for 500 homeless  
--- SRM3 testing -----
```

In this portion of the goals we can see a full department goal structure:

```
--- (Department Name)  
(Department goal #1)  
(Department goal #2)  
(Department goal #3)
```



	<p>(Department goal #4)</p> <p>(Department goal #5)</p> <p>----- (Project Name = Early School Readiness) -----</p> <p>(Project goal # 1)</p> <p>(Project goal # 2)</p> <p>----- (Grant Name = CA0322...) -----</p> <p>(Grant goal # 1)</p> <p>(Grant goal # 2)</p> <p>(Grant goal # 3)</p> <p>(Grant goal # 4)</p> <p>We use line separators with gradual indentation of names to show hierarchy so it's easier to spot grants under a project and projects under a department.</p> <p>Use the goal selection buttons to move goals from this box to the Reporting Goals box.</p>
Reporting Goals	The goals that you select to be placed in this box are the ones that will show up in the produced report. The produced goal & metric excel report



will still feature some goals and charts that may not have been explicitly selected here.

The order of the goals you select is unimportant to how it will be shown in the final report. If you want a more complete and accurate report output, you may need to select additional goals. For example, if you only select a few Initiatives but none of those initiatives' child-goals, your report will be virtually empty.

As a suggested practice, I'd recommend that users select all the Organization goals and their child goals to move to the Reporting Goals box, and then selectively choose those department, project and project grant goals that need to be included. Remember, goals report up to other goals. As you selectively choose goals, you may be omitting a goal in the chain such as leaving off a project goal that reports up to a department. The department goal will still reflect the correct progress and information but the contributing project goal you omit may not show on the report.

The 'best practice' worth teaching people may be to use the filters to limit what shows up in the Available Goals box and then to try just adding all the goals into the Reporting Goals box to see how the report first looks. It will be much easier to add all goals first and then use the report to identify what they want to take away from the report.

**\*\* Warning \*\*** if you select one or more goals into the Reporting Goals box and then try to change any of the filter criteria, your Reporting Goals will be emptied.



## Buttons

	<ul style="list-style-type: none"><li>• Move all the goals from Available to Reporting</li><li>• Move one or more selected goals from Available to Reporting</li><li>• Move one or more selected goals from Reporting to Available</li><li>• Move all the goals from Reporting to Available</li></ul> <p>You can use [SHIFT] + Mouse Click to select multiple goals in a range. You can also use [CTRL] + Mouse Click repeatedly to select multiple goals not in a range.</p>
--	-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------



## Excel Report

Organization: ECIVIS\_Old  
Report Date: 05/26/2020  
Requested By: Rob Sherman  
Engineering Manager  
[rsherman@ecivis.com](mailto:rsherman@ecivis.com)

Initiative	# of Goals	Goals in Progress	Average Outcome Progress
Local Solar - 2020	1	1	
Promote Income Security for Custodial Parents	0	0	
Promote Supportive Parenting	1	1	
Reduce Homelessness	4	1	
<b>Totals</b>	<b>6</b>	<b>3</b>	

**Key**

- Outcome Exceeded
- Outcome Achieved Early
- Achievable By Target Date
- Progress Towards Outcome
- Progress Not Started

Initiative Dashboard, Created by Rob Sherman, [rsherman@ecivis.com](mailto:rsherman@ecivis.com), 05/26/2020  
Source: eCivis™ Grants Network®  
<http://www.ecivis.com/>

## Overview

The Excel report that is produced is an Excel workbook with 5 tabs: Initiative Dashboard, Organization Performance, Department Performance, Metrics, and Chart Data. Each one of the Excel sheets serves a different purpose we'll cover in detail.

Each of the sheets features the following standard elements (where applicable):

- Client logo
- Sheet Title, such as (client name) Initiative Dashboard



- Report Header including Organization, Report Date, Reported By
- Key / Legend for info icons
- Report Footer including sheet name, reported by, and eCivis source and URL





## Initiative Dashboard

	A	B	C	D	E	F	G	H
1								
2	eCivis							
3								
4								
5								
6								
7	<b>ECIVIS_Old Initiative Dashboard</b>				<b>Organization:</b> ECIVIS_Old			
8					<b>Report Date:</b> 05/26/2020			
9					<b>Requested By:</b> Rob Sherman			
10					Engineering Manager			
11					<a href="mailto:rsherman@ecivis.com">rsherman@ecivis.com</a>			
12	<b>Initiative</b>							
13	<b>Name</b>	<b># of Goals</b>	<b>Goals in Progress</b>	<b>Average Outcome Progress</b>				
14	Local Solar - 2020	1	1					
15	Promote Income Security for Custodial Parents	0	0					
16	Promote Supportive Parenting	1	1					
17	Reduce Homelessness	4	1					
18	<b>Totals</b>	<b>6</b>	<b>3</b>					
19	Initiative Dashboard, Created by Rob Sherman, rsherman@ecivis.com, 05/26/2020							
20	Source: eCivis™ Grants Network®							
21	<a href="http://www.ecivis.com/">http://www.ecivis.com/</a>							
22								

**Key**

- Outcome Exceeded
- Outcome Achieved Early
- Achievable By Target Date
- Progress Towards Outcome
- Progress Not Started

The initiative dashboard is like an executive dashboard as it's meant to provide a quick at-a-glance look at how the organization initiatives are performing.

Dashboard columns:

- Name - the name of the Organization Initiative (not the child goals associated with that initiative).
- # of Goals - this is the number of child goals that have been created under this initiative.
- Goals in Progress - this is the number of child goals that have recorded metric progress
- Average Outcome Progress - this is a badge icon assigned to the initiative based on an algorithm. The algorithm weighs several factors in deciding what badge to assign to the initiative such as:
  - The number of goals in progress
  - The difference between recorded progress on a goal and the goal's target (percentage of work completed)



- The difference between the fiscal year assigned to the goal and the number of months left in a calendar year (what percentage of time has lapsed so far)
- Then the algorithm uses rules for each badge icon to assign to each of the child goals.
- An average is calculated based on how the child goals are performing based on all the above rules and weight.

The badge icons are meant to supply a general feeling based on the recorded progress of the goal(s) based on the factors above.



# Organization Performance

	A	B	C	D	E	F												
1																		
2																		
3																		
4																		
5																		
6																		
7	<b>ECIVIS_Old Organization Performance</b> By Initiative and Outcomes		Organization: ECIVIS_Old Report Date: 05/26/2020 Requested By: Rob Sherman Engineering Manager <a href="mailto:rsherman@ecivis.com">rsherman@ecivis.com</a>		<table border="1"> <thead> <tr> <th colspan="2">Key</th> </tr> </thead> <tbody> <tr> <td></td> <td>Outcome Exceeded</td> </tr> <tr> <td></td> <td>Outcome Achieved Early</td> </tr> <tr> <td></td> <td>Achievable By Target Date</td> </tr> <tr> <td></td> <td>Progress Towards Outcome</td> </tr> <tr> <td></td> <td>Progress Not Started</td> </tr> </tbody> </table>		Key			Outcome Exceeded		Outcome Achieved Early		Achievable By Target Date		Progress Towards Outcome		Progress Not Started
Key																		
	Outcome Exceeded																	
	Outcome Achieved Early																	
	Achievable By Target Date																	
	Progress Towards Outcome																	
	Progress Not Started																	
9																		
10																		
12	<b>Local Solar - 2020</b>																	
13	<b>Solar Panel Installations</b>																	
14			Status: 															
15			Current: 415 Installations															
16			Target: 10000 Installations															
17			Fiscal Year: 2020															
18																		
19																		
20																		
21																		
22																		
23																		
24																		
25	<b>Contributors</b>																	
26	Department	Project	Target	Completed														
27	Parks and Rec		50000 Installations	510 Installations														
28																		
29	<b>Promote Supportive Parenting</b>																	
30	Expand the outreach of our parenting support programs to 5,000 citizens																	
31			Status: 															
32			Current: 142 Citizens															
33			Target: 5000 Citizens															
34			Fiscal Year: 2020															
35																		
36																		
37																		
38																		
39																		
40																		
41																		
42	<b>Contributors</b>																	
43	Department	Project	Target	Completed														
44	Parks and Rec		500 Citizens	142 Citizens														
45																		



The Organization Performance sheet is a more detailed look that expands upon the information from the Initiative Dashboard. Here we see in bold titles the names of the initiatives, then blue titled bars representing the actual child goals for that initiative along with a chart, status, current progress, target value, and fiscal year. Underneath the chart is a “Contributors” section designed to show which departments, and or projects are helping to achieve the organization goal targets along with their completed progress.

In some rows, you may see a department but not a project value. This indicates that the goal is a department goal. If you see a row that has both a department and project value that indicates that the goal is from a project or project-grant within a department.

Some initiatives have more than one child goals, so you may see a succession of blue title bars under the main bold title initiative to indicate they are grouped together.

This is the first time we’ve included charts in our reports, these are actual Excel charts using native Excel charting. You can click into the chart and make changes within Excel itself and the data for any given chart is included on the last tab Chart Data. Customers can, if they wish, modify or add to the chart data and the chart will update itself in real-time. All charts, at least for now, are simple line charts that show cumulative progress toward the goal target summed and grouped by month. As an example, the first chart for Solar Panel installations shows 20 installs in May, but by June there were 190 installs. That means there were a total of 170 installs throughout June plus the 20 installs in May. This information could be reviewed in the Metrics sheet for more details.

Average Outcome Progress - this is a badge icon assigned to the initiative based on an algorithm. The algorithm here is a slightly easier calculation since it’s a single goal. It weighs several factors in deciding what badge to assign to the initiative such as:


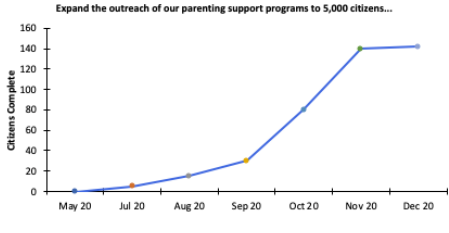
- The difference between recorded progress on a goal and the goal’s target (percentage of work completed)
- The difference between the fiscal year assigned to the goal and the number of months left in a calendar year (what percentage of time has lapsed so far)
- Then the algorithm uses rules for each badge icon to assign to each of the child goals.



- Outcome Exceeded - if the completed progress is greater than the target it will receive this badge
- Outcome Achieved Early - if the completed progress is equal to the target before the end of the calendar year the fiscal goal is assigned it will receive this badge
- Achievable by Target Date - if there is some recorded progress and the percentage of that progress is greater than the percentage of time left to complete the work it will receive this badge.
- Progress Towards Outcome - if some progress is recorded but the work percentage completed is less than the percentage of time left for the goal, or the fiscal year has passed (without meeting its target) it will receive this badge.
- No Progress - if no progress is recorded, it will receive this badge.



## Department Performance

	A	B	C	D	E	F	G	H								
1	 <div style="text-align: center;"> <p><b>Goals Performance Report</b> By Organization, Department, Project and Grant</p> <p>Organization: ECIVIS_Old Report Date: 06/11/2020 Requested By: Rob Sherman Engineering Manager <a href="mailto:rsherman@ecivis.com">rsherman@ecivis.com</a></p> </div> <div style="float: right; border: 1px solid black; padding: 5px; margin-top: 10px;"> <p><b>Key</b></p> <ul style="list-style-type: none"> <li><span style="color: green;">📈</span> Outcome Exceeded</li> <li><span style="color: green;">✅</span> Outcome Achieved Early</li> <li><span style="color: orange;">🕒</span> Achievable By Target Date</li> <li><span style="color: yellow;">📊</span> Progress Towards Outcome</li> <li><span style="color: red;">❌</span> Progress Not Started</li> </ul> </div>															
13									Organization: <b>ECIVIS_Old</b>							
14									Organization Goals	Type	Title	Description	Fiscal Year	Target	Current	Progress
15										Output	Expand the outreach of our parenting support programs to 5,000 citizens...	The county has existing parenting support programs that are very successful, we ...	2020	5,000.00 Citizens	142.00 Citizens	<span style="color: yellow;">📊</span>
16									<div style="border: 1px solid black; padding: 5px; margin-top: 10px;"> <p style="text-align: center;">Expand the outreach of our parenting support programs to 5,000 citizens...</p>  </div>							
29									<b>Department Parks and Rec</b>							
30									Department Goals	Type	Title	Description	Fiscal Year	Target	Current	Progress
31										Outcome	Create Community School Park program for 200,000 citizens...	Establish a new Community School Park program with the Los Angeles Unified Schoo...	2020	200,000.00 Citizens	85.00 Citizens	<span style="color: yellow;">📊</span>
32										Outcome	Link 100 bike paths along the Los Angeles River...	Link bike paths and green space to create an active transportation and recreatio...	2020	100.00 Bike Paths	0.00 Bike Paths	<span style="color: red;">❌</span>
33									Contributing Goals	Type	Title	Description	Fiscal Year	Target	Current	Progress
34										Outcome	Create satellite parent support services in parks to support 500 citizens...	Using existing park structures train staff to introduce parents about the county...	2020	500.00 Citizens	142.00 Citizens	<span style="color: yellow;">📊</span>
35										Outcome	Extend access to park services to aid 5,000 homeless...	Train Department field staff on the City's "No Wrong Door" policy and Coordinate...	2020	5,000.00 Citizens	245.00 Citizens	<span style="color: yellow;">📊</span>
36										Outcome	Install 50,000 outdoor security lights powered by solar...	Install new, and ensure 100% functionality of, 50,000 outdoor security lights po...	2020	50,000.00 Installations	510.00 Installations	<span style="color: yellow;">📊</span>
37	<b>Project Early School Readiness</b>															
38	Project Goals	Type	Title	Description	Fiscal Year	Target	Current	Progress								
39		Outcome	Hire 2 Full-Time Park Rangers	Hire 2 Full-Time Park Rangers	2020	2.00 Rangers	0.00 Rangers	<span style="color: red;">❌</span>								
40	Contributing Goals	Type	Title	Description	Fiscal Year	Target	Current	Progress								
41		Outcome	Create Community School Park program for 2,000 citizens...	Establish a new Community School Park program with the Los Angeles Unified Schoo...	2020	2,000.00 Citizens	85.00 Citizens	<span style="color: yellow;">📊</span>								

The Department Performance sheet focuses just on department performance in detail, but it does feature a small glimpse at organization goals after the report header. The glimpse at the top will feature at most 3 goals from the Organization. The goals chosen are based on an algorithm to show one high performing, one medium performing, and one low performing goal along with the charts that coincide with those goals. In the image above, only one goal is shown due to low data entry.



Beyond the organization “glimpse” the rest of the report features one or more departments (as selected by report form) with large blue title bars for the name of the department. In the image above we see a full set of goals defined for this department. In the image above, “Department Goals” has two rows under it. These are goals that were created for just the department only and do not report up to any organization goals. The next section “Contributing Goals” under the department goals are those department goals that were created that DO contribute up to organization goals.

This format of a goals section followed by a contributing goals section repeats for projects and project-grants in the department before it moves onto the next department.

The progress icons shown on this worksheet follow the same algorithm as the previous Organization Performance sheet.

## Metrics

	A	B	C	D	E	F	G	H	I
1									
2	eCivis								
3									
4									
5									
6									
7	<b>Grant Metrics</b>								
8	By Department and Project								
9									
10									
11	<b>Department</b>	Parks and Rec							
12	<b>Project</b>	Early School Readiness							
13	<b>Grant</b>	CA0322 Bright Schools Program - FY 2016							
14	<b>Grant Metrics</b>	<b>Metric</b>	<b>Target</b>	<b>Completed</b>	<b>As Of</b>	<b>Performance Period</b>	<b>Assigned To</b>	<b>Files</b>	<b>Notes</b>
15		Increase student participation in parks education programs by 20,000 students	20,000.00 Students	2,560.00 Students	06/15/2020	07/01/2020 - 07/31/2021	Standard	Y	Funds from this grant will enable us to assist in early school readiness by reaching 20,000 students.
16		Install 500 new outdoor security lights	500.00 Installations	510.00 Installations	09/15/2020	07/01/2020 - 07/31/2021	R. Sherman	Y	Install new, and ensure 100% functionality of, outdoor security lighting
17		Provide park services to aide 500 homeless citizens in finding temporary housing	500.00 Citizens	245.00 Citizens	12/15/2020	07/01/2020 - 07/31/2021	R. Sherman	N	Provide park services to aide 500 homeless citizens in finding temporary housing
18		Serve 500 citizens from our community school parks program	500.00 Citizens	85.00 Citizens	10/15/2020	07/01/2020 - 07/31/2021	R. Sherman	N	Serve 500 citizens from our community school parks program
19		Serve 500 parent citizens from park satellite parent support program	500.00 Citizens	142.00 Citizens	12/16/2020	07/01/2020 - 07/31/2021	R. Sherman	N	Serve 500 parent citizens from park satellite parent support program
20	<b>Department</b>	PD							
21	<b>Project</b>	3918 metric test #2							
22	<b>Grant</b>	F00716 The Arthur M. Blank Family Foundation: Atlanta Falcons Youth Foundation (Georgia) - FY 2014							
23	<b>Grant Metrics</b>	<b>Metric</b>	<b>Target</b>	<b>Completed</b>	<b>As Of</b>	<b>Performance Period</b>	<b>Assigned To</b>	<b>Files</b>	<b>Notes</b>
24		test1	100.00 beers	10.00 beers	05/26/2020	05/28/2020 - 07/11/2020	J. Rules 1 23	Y	asdfd
25	<b>Project</b>	Test Project GN-4958							
26	<b>Grant</b>	JJ0218 Test Org Grant							
27	<b>Grant Metrics</b>	<b>Metric</b>	<b>Target</b>	<b>Completed</b>	<b>As Of</b>	<b>Performance Period</b>	<b>Assigned To</b>	<b>Files</b>	<b>Notes</b>
28		Metric 2020-05-23 19:34:49	100.00 Units	0.00 Units	05/23/2020	05/01/2020 - 05/31/2020	O. Manager	Y	I have notes.
29		Metric 2020-05-23 20:15:57	5.00 Things	0.00 Things	05/23/2020	05/01/2020 - 05/31/2020	O. Manager	Y	Notes
30									
31		Metrics, Created by Rob Sherman, rsherman@ecivis.com, 05/26/2020							
32		Source: eCivis™ Grants Network®							
33		<a href="http://www.ecivis.com/">http://www.ecivis.com/</a>							



The Metrics sheet is a detailed look at all the underlying metrics for the selected departments and projects on the goals and metrics report form. The metrics are broken down and grouped by Department > Project > Project-grant with different background colors for the rows.

The columns for the Metrics sheet are self-explanatory. Of special note here, the Assigned To column can show the individual the metric is assigned to, or it can show the group name the metric is assigned to like how tasks are assigned.





## Chart Data

	A	B	C	D	E	F	G	H	I	J	K
1											
2											
3											
4											
5	eCivis										
6											
7	<b>ECIVIS_Old Chart Data</b>										
8											
9											
10											
11	<b>Organization Performance Chart Data</b>										
12	<b>Solar Panel Installations</b>										
13	May 20	Jun 20	Jul 20	Aug 20	Sep 20						
14		20	190	315	390	510					
15											
16	<b>Expand the outreach of our parenting support programs to 5,000 citizens</b>										
17	May 20	Jul 20	Aug 20	Sep 20	Oct 20	Nov 20	Dec 20				
18		0	5	15	30	80	140	142			
19											
20	<b>Prevent 10,000 Citizens from Becoming Homeless</b>										
21	May 20	Jul 20	Aug 20	Sep 20	Oct 20	Nov 20	Dec 20				
22		0	10	25	50	95	145	245			
23											
24											
25	<b>Department Performance Sheet Chart Data</b>										
26	<b>Expand the outreach of our parenting support programs to 5,000 citizens...</b>										
27	May 20	Jul 20	Aug 20	Sep 20	Oct 20	Nov 20	Dec 20				
28		0	5	15	30	80	140	142			
29											

**Organization:** ECIVIS\_Old  
**Report Date:** 05/26/2020  
**Requested By:** Rob Sherman  
 Engineering Manager  
[rsherman@ecivis.com](mailto:rsherman@ecivis.com)

The Chart Data sheet is kind of a no-frills sheet. It does have a report header and it does separate chart data by Organization Performance Chart Data and Department Performance Chart Data. Each section below the header is for any of the charts found on either of those two sheets. Each chart has 3 rows, a chart title, the month & year and the cumulative completed progress for that given month.

The charts on the other two sheets use this data in real time. If you modify either the month & year or cell data values for the charts, the charts will be updated.