Goal Setter Quick Guide

General navigation

- "Goals" Tab contains the standard goals list view
  - Choose and pin a view in the top left corner
  - Search for goals in the search box
  - Manage views and define filter criteria on gear icon
  - Visualize current view with list charts
  - Open the goal detail view by clicking on the study column
- "Goals (Classic)" Tab contains the classic goal list view
  - Define filters in the top pane
  - Open the goal detail view by clicking on a goal title

Create a new goal by clicking on the "New Goal" button

Add New Goal

- Click on "New Goal" in a list overview
- Select goal type (clinical/study/CRO/Labcorp/Parexel)
- Select study (or project for General Clinical Team goal)
  - You can only pick studies with assigned IMPACT role RES or CPM for clinical team goals
- Select a standard goal or "-- enter goal manually –"
  - Optionally enter value for placeholder ([value] %)
- Enter target month or date (for Labcorp/Parexel)
- Select goal status
  - Set achieved date if goal status = "Achieved"
- Optionally set goal flags
  - Clinical/study/CRO goals: IPT Key Goal
  - Labcorp/Parexel goals: Final COSMOS delivery
- Set approver if goal is created after period freeze date
- Optionally enter a comment
- Click on "Create Goal" (system will check for duplicates)

Edit Goal (from goal detail view)

- Click on "Edit Goal" in the top right corner
- You are only allowed to edit goals for studies with assigned IMPACT role RES or CPM for clinical team goals
- Make changes
- Allowed changes vary between locked and unlocked goals:
  - Unlocked goal: Title, target, status, flags, comment
  - Locked goal: Status, flags, comment
- Set achieved date if goal status = "Achieved"
- Set approver if goal is edited after period freeze and save

Mark Goal as Final (from goal detail view)

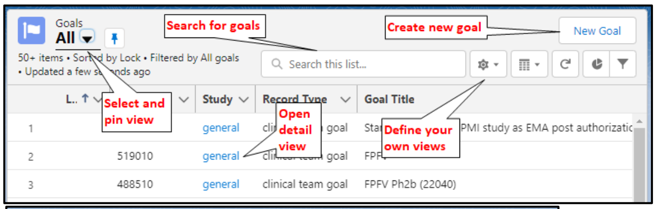
- Click on "Mark as Final"
- You are only allowed to mark goals as final for studies with assigned IMPACT role RES or CPM for clinical team goals
- Confirm popup

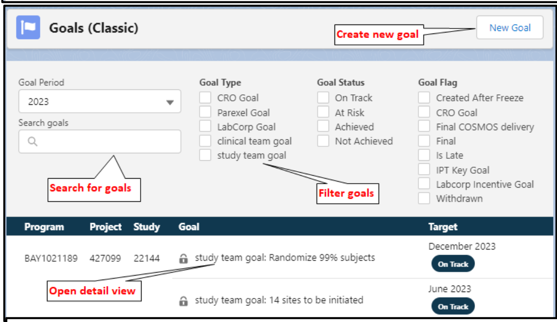
Withdraw a final goal (from goal detail view)

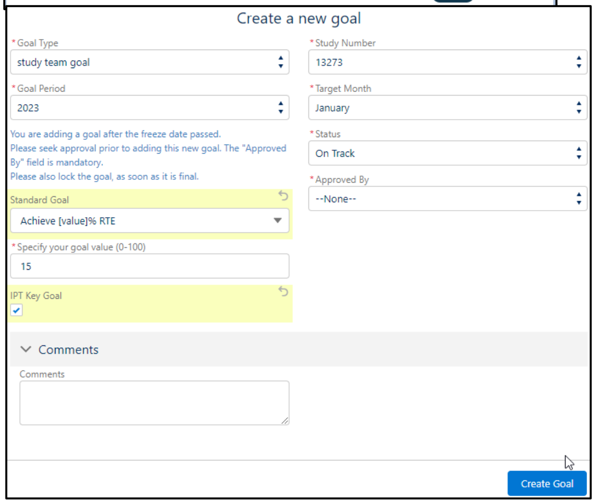
- Click on "Withdraw"
- You are only allowed to withdraw goals for studies with assigned IMPACT role RES or CPM for clinical team goals
- Enter withdrawal comment
- Click on "Withdraw Goal"

Undo withdrawal (from goal detail view)

- Click on "Undo Withdrawal"
- You can only undo withdrawals on goals for studies with assigned IMPACT role RES or CPM for clinical team goals
- Confirm popup







Revise a final goal (from goal detail view)

- Click on "Revise Goal"
- You are only allowed to revise goals for studies with assigned IMPACT role RES or CPM for clinical team goals
- Change title and/or target
- Select approver group
- Enter revise comment and save

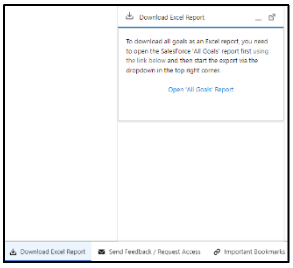
Delete non-final goal (from goal detail view)

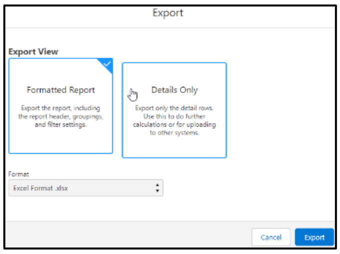
- Click on "Delete"
- You are only allowed to delete own goals for studies with assigned IMPACT role RES or CPM for clinical team goals
- Confirm popup

Download Excel export

- Click on "Download Excel Report" in footer bar
- Click on link "Open 'All Goals' Report" in pop up.

In the new tab, click on "Export", select format, and click on "export" again





Send feedback / request access

- Click on "Send Feedback / Request Access" in footer bar
- Fill form and click submit