

## 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

The image displays three screenshots of the Goal Setter application interface. The top screenshot shows the 'Goals' tab with a list of goals and annotations for 'Search for goals', 'Select and pin view', 'Open detail view', 'Create new goal', and 'Define your own views'. The middle screenshot shows the 'Goals (Classic)' tab with filter options for Goal Period, Goal Type, Goal Status, and Goal Flag, along with a table of goals and an 'Open detail view' annotation. The bottom screenshot shows the 'Create a new goal' form with fields for Goal Type, Study Number, Goal Period, Target Month, Status, and Approver, along with a 'Create Goal' button.

## 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

The image displays two screenshots of the Goal Setter application interface. The left screenshot shows the 'Download Local report' popup with instructions on how to download goals as an Excel report. The right screenshot shows the 'Export' popup with options for 'Formatted Report' and 'Details Only', a 'Format' dropdown menu, and 'Cancel' and 'Export' buttons.

## Send feedback / request access

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