

Goal Management in BoardBook Premier

Goal Management in BoardBook Premier is a BoardBook Premier Advanced Feature. BoardBook allows you to not only create different 'Goal Types' for example 'Board Goals' or 'Campus Goals', as well as create and manage individual goals within a 'Goal Type'. Once Goals have been added they can be referenced in Agenda Items.

In this document we will cover the following subjects:

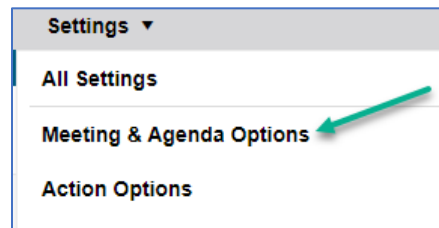
- Enabling the Goals Agenda Item Field
- Creating and Managing Goal Types
- Creating and Managing Individual Goals Within a Goal Type
- Working with Goals Within an Agenda

Enabling the Goals Agenda Item Field

NOTE: To enable the 'Goals' agenda item field you must have the 'Settings Manager' permission.

NOTE: Changing system settings incorrectly can cause issues which may be very difficult to recover from. Many of the settings in this section are NOT intuitive. Please only change or update settings as specifically described in these instructions.

In the Gray Menu Bar select Settings, and then 'Meeting & Agenda Options'.



Scroll down and you will find the header below:

Define your Organization's Agenda Item Sections for Meetings and the Public Page

Continue scrolling until you find the 'Goals' section as shown below:

Goals	<input type="checkbox"/> Enable this Section?	<input type="checkbox"/> Public Notices?
Public / Ar	<input type="checkbox"/> Default to Shown when the Quick View pages load?	<input type="checkbox"/> Public Agendas?
		<input type="checkbox"/> Public Minutes?
		<input type="checkbox"/> Public Projector?

Enable Goals as an Agenda Item section by placing a check mark in front of 'Enable this Section?'

Use the drop down so set the default permission for this agenda item field.

NOTE: If your intent is to only use goals to track and report on how often goals are addressed in agendas and not to display information on a given agenda item, select 'Agenda Managers'. This will prevent goals from displaying for other users.

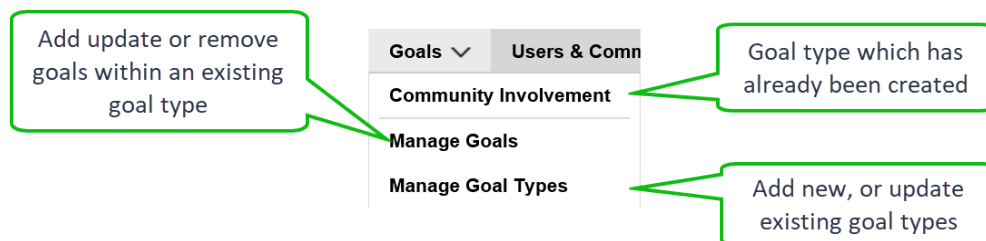
If you selected a permission other than 'Agenda Managers' you may wish to check 'Default to Shown when the Quick View pages load'

If you selected the permission 'Public / Anyone / Everyone' you may want to check one or more public screens upon which the Goals information will be displayed.

NOTE: To manage Goal Types, or to create or manage Goals a user must have the 'Goal Manager' permission.

Creating and Managing Goal Types

In the Grey Menu bar click on 'Goals'. To create or manage your organization's Goal Types choose 'Manage Goal Types'.



From the 'Manage Goal Types' screen you can, Add a New Goal Type, Deactivate an existing Goal Type, or, Activate a previously deactivated Goal Type.

Add a New Goal Type:

Click on the blue 'Add New Goal Type' button.

Add a Goal Type Title:

You will also need to add a Goal Type Description

Deactivate an existing Goal Type

In the 'Active Goal Types' section click the orange 'Deactivate' button for the goal type.

Activate a previously deactivated Goal Type

In the 'Inactive Goal Types' section click the green 'Re-Activate' button for the goal type.

Creating and Managing Individual Goals Within a Goal Type

In the Grey Menu bar click on 'Goals'. To create or manage individual goals you can either click the name of the 'Goal Type' you want to manage goals within, or click 'Manage Goals'.

View Goals of Goal Type: Community Involvement Manage Goal Types

Active Goals

Goal	Goal Type	Start and End Dates	Last Updated	Percent Complete
Event Support Identify ways the organization can support community events	Community Involvement	4/1/2020 3/31/2021	6/2/2020 at 10:49 AM by Russell Roberts Report	0.1% Complete
Website Update Make our web presence more community facing and welcoming	Community Involvement	4/24/2020 4/24/2021	4/24/2020 at 1:29 PM by Russell Roberts Report	

Inactive Goals

Goal	Goal Type	Start and End Dates	Last Updated	Percent Complete
There are no Inactive 'Community Involvement'.				

[+ Add New Goal](#)

Just below the blue 'Manage Goals' bar you can use the 'View Goals of Goal Type' drop down to switch between 'Goal Types'.

Within a Goal Type, you can, add a new goal, you can also edit, update, deactivate, re-activate, or delete an existing Goal.

Update a goal title or description

Update the start or end date for a goal

Update the completion level of the goal

Deactivate or permanently delete a goal

Goal Type:
 Community Involvement

Goal Title:
Event Support

Goal Description:
Identify ways the organization can support Community Events

Start Date:
2020-04-01

End Date:
2021-03-31

Percent Complete:
0.1

[Deactivate](#) [Delete](#)

[Save](#) [Cancel](#)

Add a New Goal:

Click on the blue 'Add New Goal' button.

Add a Goal Title:

You will also need to add a Goal Description

If appropriate you can add an optional Start and or End Date for the goal

You may also add a 'Percent Complete'

Edit, update, deactivate, re-activate, or delete an existing Goal:

In the appropriate Active Goals / Inactive Goals section click on the goal you wish to change.

You may update the Goal Title:

You may add or update the optional Goal Description

If appropriate you can update or add an optional Start and or End Date for the goal

You may also add update the 'Percent Complete'

Finally, you may Delete, Deactivate or Re-Activate the goal.

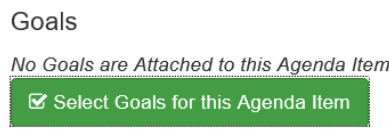
Working with Goals Within an Agenda

Now that you've added at least one Goal Type with at least one Goal you can start working with Goals in your Agenda.

Go into Edit Agenda as you normally would.

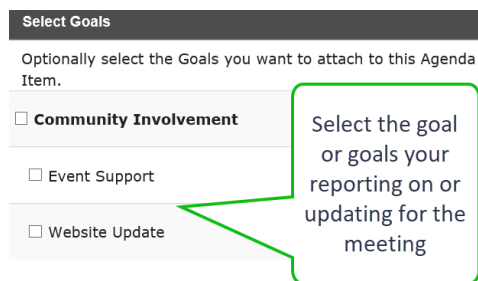
Either add a new, or edit an existing Agenda Item.

Scroll down to find green 'Select Goals for this Agenda Item' button. It will look like this:



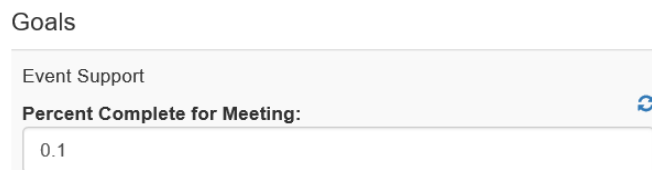
NOTE: If you do not find a Goals section contact BoardBook support and ask that it be added. Please specify what agenda item field, such as Description, or Attachments, you would like the Goal section to follow.

Click on the green 'Select Goals for this Agenda Item'



Check the box next to the Goal or Goals you wish to update the 'Percentage Complete'.

The selected Goal or Goals will show up with their current 'Percentage Complete'



Type the new Percentage Complete into the field

NOTE: This is simply for display purposes on this agenda item. The actual percentage complete will need to be updated by managing the goal itself as previously described.