

Copy and Paste Goals

After your district's first year on SameGoal, some document information will pull from completed documents into new documents to help save you time. For example, when you create progress reports, goal and objective information from the student's plan document will auto-populate in the progress report.

However, during your district's first year on SameGoal, information won't auto-populate documents because you won't yet have documents authored in SameGoal. You may have "stub" documents (documents populated with only the most basic program information) and **Upload** documents (with PDF attachments of documents authored in your previous system).

Populate documents with goal/objective information

In order to populate a document (such as a new progress report or a "stub" document during an amendment) with goals and objectives, you can copy from an **Upload** document rather than retyping all of the information.

Steps *To copy and paste goals from an Upload document:*

1. Navigate to the student's **Documents** tab.
2. Locate the **Upload** document that has an attachment with their goals listed.
3. Open the document in a new tab.
 - Center click on the link or
 - Right click on the link and select **Open link in new tab** or **Open link in new window**.
4. In your current tab, open the document you want to populate.
 - If needed, amend the "stub" document or create a new document to populate.
5. In the new tab with the **Upload** document, go to the **Attach** tab in the top right corner and click on the attachment to preview it.
6. Click and drag your windows such that each tab is visible on your screen.

- You may need to click and drag one of the tabs so it pops out and creates a new window.
7. While looking at both documents, find the goals and objectives in the PDF attachment.
 8. Highlight the content and copy it.
 9. Click into the SameGoal document, click into the goals or objectives field, and paste the information.
 - You may need to add a new goals/objectives section.
 10. Do this for each goal/objective you would like to copy over.