

Work With KPD

"Stub" documents

Your district's first year on SameGoal, they may decide to load key program data into SameGoal, creating "stub" documents. These "stub" documents create real documents in SameGoal, and fill them out with the most basic program information based on documents in your old system.


This helps to set program participation and deadlines, but most of the fields in the document are left blank.

Bulk reassign documents

Usually, when "stub" documents are loaded into SameGoal, they are assigned to an *Archives* account. In order to reassign these documents to have a different owner, you can bulk reassign them.

Steps *To bulk reassign documents:*

1. Navigate to the **All** page.
2. Use the filters to search for the documents you wish to reassign and select them.
You can only reassign documents to one user at a time, so select documents based on who they should be reassigned to.
3. Once you have selected the documents, go to **Share > Update Collaborators**.
4. While on the **Share** tab, search for the new owner on the **Add Collaborator** side.
5. Click on their name to add them to the **Collaborative Team**.
6. Change their permission to **Is Owner**.
7. Remove *Archives* by changing the permission to **Remove**.
8. Click **Save**.

 **Tip** An admin user can search for the *Archives* account on the **Users** page, and click on the *Archives* account to be brought to its **Documents** tab. This page will show all documents on the *Archives* caseload (as opposed to searching for *Archives* documents on the **All** page.)

View all deadlines

In SameGoal, you can see upcoming deadlines on the **Deadlines** page. However, by default, you will only see deadlines that have been assigned to you. If *Archives* is listed as the owner for the "stub" documents in your system, the deadlines will be assigned to the *Archives* account. But it might still be helpful for you to view these deadlines.

Steps *To display view all deadlines:*

1. Go to the **Deadlines** page.
2. While viewing the calendar, click on the **Assigned to me** dropdown.
3. Click on **All**. The calendar will switch and show you all deadlines for any student who you have an educational interest in.

You may also have access to run deadlines reports. Go to the **Reports** page, select the special program you'd like to view deadlines for, select **Deadlines**, and run the report.