samegoal

Report Troubleshooting and FAQs

Below are some common questions issues users have when running reports, along with answers and solutions.

- Not seeing all expected information
- Filters not working
- Not able to manipulate/analyze data sufficiently
- Resolving data issues in deadlines reports

Not seeing all expected information

If a report isn't returning all the documents you expect

Trying clearing out the effective date. The effective date returns documents that have a start date before the effective date *and* an end date after the effective date. By default, the effective date is set to the date the report is run and many users don't change this setting when they run a report. If the report is not returning documents you would expect to see, try changing the effective date or clearing it out.

If a report isn't returning all the deadlines you expect

If you run a deadlines report and don't get all the results that you expected, it's likely that some of the deadlines have been satisfied. Deadlines fall off the report once they've been satisfied. To confirm, you can go to a student's page to confirm they no longer have an outstanding deadline.

In general, if you run a report and it appears as though information is missing, try to expand your search by changing the settings.

Consider changing the following settings:

- **Document status:** include incomplete documents
- **Record types:** include invalid records
- **Meeting date:** expand the date range or clear the meeting date fields

- **District Enrollment:** include inactive students
- **Program Enrollment:** include students who are not participating in the given program

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Tip If you are still not seeing the information you expect to see, you may not have the right access. Ensure that relevant documents are shared with you and/or discuss your permissions with your administrator.

Filters not working

Only columns with fewer than 1,000 unique values can be filtered. If there are more unique values than that, filtering will not work.

If a column has fewer than 1,000 unique values and filters still aren't working, try clearing out previous filters.

When using filters in a report, creating a new filter in a different column will not clear out any previous filters that were set. A new filter will only further narrow down the current subset of data.

Rather than going column by column and clearing out filters individually, there is a **Clear filters** button (crossed out funnel) in the top menu that you may use.

Data manipulation and analysis

Sometimes users want to perform more in-depth data analysis or manipulate the data in a way that can't be achieved with sorting and filtering.

In order to process the data more complexly (perform functions, rearrange columns, compare data from multiple reports, create pivot tables, etc.), you may choose to download the data and view it in a different spreadsheet application.

Steps *To export data to a spreadsheet application:*

1. Click the **Download** button in the top menu.
2. Choose to download as a CSV.
3. Launch your spreadsheet application of choice.
4. Import the CSV.
    - In Google Sheets: **File** > **Import** > select the CSV file.
    - In Excel: **Data** > **Get External Data from Text** > **From Text/CSV** > select the CSV file.

Resolving data issues in deadlines reports

When you run a deadlines report, you may find that there are data issues. Data issues arise when required documentation is skipped or when there are errors with the documentation.

Potential data issues include:

- "Missing" documents
- District calendar issues

Steps *To resolve data issues:*

1. Navigate to a student's **Deadlines** tab where you'll see a list of all upcoming/past due deadlines as well as any data issues.
2. Expand the data issue row you wish to resolve to see more information.
3. If a document is "missing":
    - Check the student's **Documents** tab to see if the expected document has been completed.
        - If the expected document has already been completed, it was likely filled out incorrectly; required fields might be missing or dates could be out of order. To update the document, mark it incomplete. Update items listed in the **Determined from** column of the data issue as necessary and mark the document complete.
    - Check the list of **Incomplete documents not included** to see if the required document has been started but not completed.
        - If this is the case, the document needs to be marked completed (once it has been filled out).
    - If the required document does not exist, create a new one to be completed.
4. Some deadlines are calculated based on the district calendar. If there are calendar issues:
    - If the district calendar is correct, but the dates in the document don't make sense with the calendar, incomplete the document and update the dates. Then mark it complete again.
    - If there is a mistake with the district calendar or the calendar does not extend far enough in the future, update the calendar by going to **Settings** > **District Information** > **School Calendars** (located at the bottom of the page).

5. Navigate back to the report tab and use the **Refresh** menu option to confirm the data issue has been resolved.

Tip If it is your district's first year using SameGoal, data issues may be a result of transitioning to SameGoal. For example, there may be documents missing in SameGoal that were completed elsewhere. If this is the case, confirm the data issues are from transitioning by going to a student's page. You may choose to upload additional stub documents to resolve the data issues, otherwise they will be hidden after 90 days.