Goals

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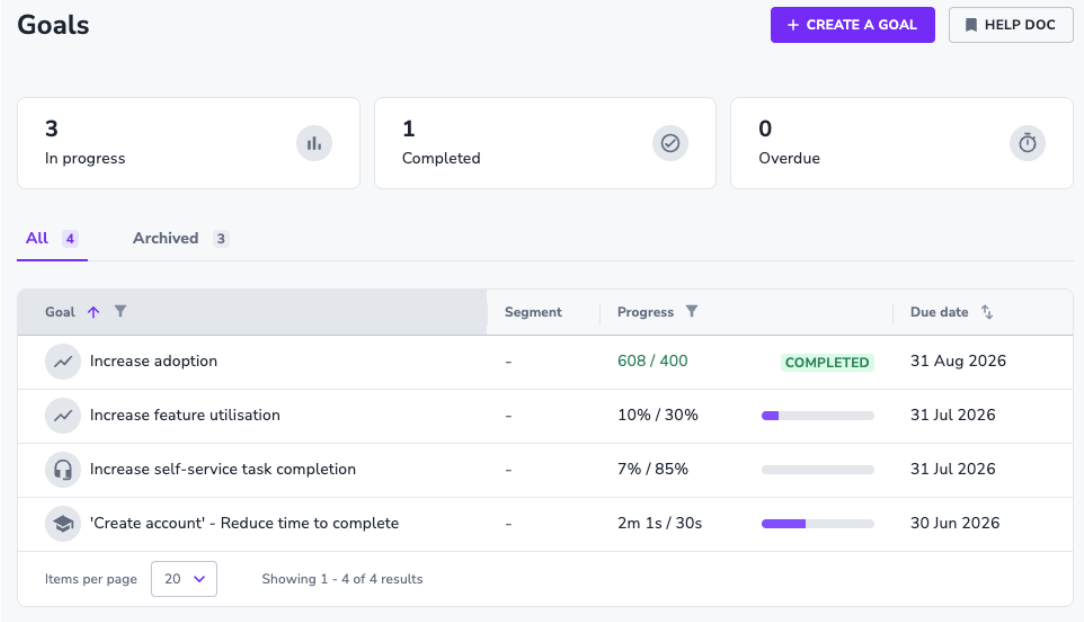
Goals connects Userlane's behavioral data to the specific outcomes your organization is accountable for. Define a target, a deadline, and an optional Audience, and Goals tracks progress automatically. No manual exports or additional configuration required.

How it works

Each goal tracks one metric against one target. When creating a goal, you define:

- **The outcome area** - chosen from four options: reduce time/cost to learn, reduce errors, reduce support tickets, or drive usage/adoption
- **The target** - the value you are committing to reach
- **The deadline** - the date by which you expect to reach it
- **The Audience** (optional) - a specific user population to scope the measurement to

Progress updates daily (overnight) using the same behavioral data that powers your HEART score.



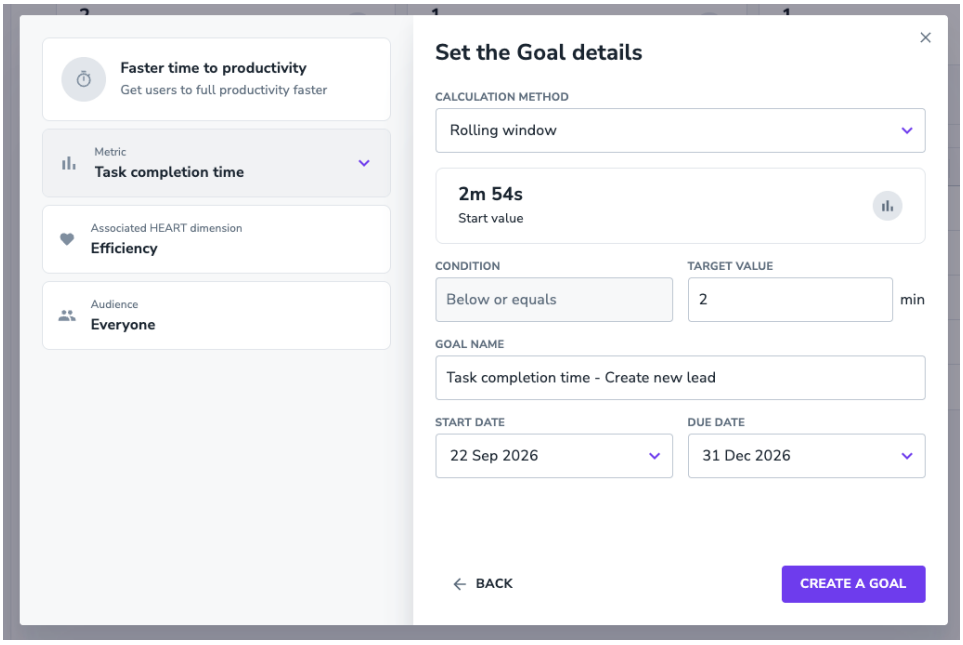
Creating a goal

To create a new goal:

1. Navigate to **Goals** in the left navigation of the Userlane Portal.
2. Click **Add goal**.
3. **Select an outcome area.** Choose from one of the nine predefined outcomes in the library or select **'None of the above'** to continue without pre-filtering.
4. **Select a metric.** Choose a pre-built metric from the list. Each metric shows what it tracks, a short description, and the associated HEART dimension (were appropriate).
5. **S**elect the specific content the metric will track (the options shown depend on the goal type) and, optionally, an Audience to restrict the goal to.
6. **Set your goal details.** Set the calculation method, target value, a due date, and goal name. The current

metric value is displayed as your starting point and captured automatically when you save.

7. Click **Create a goal**.



The Goals view

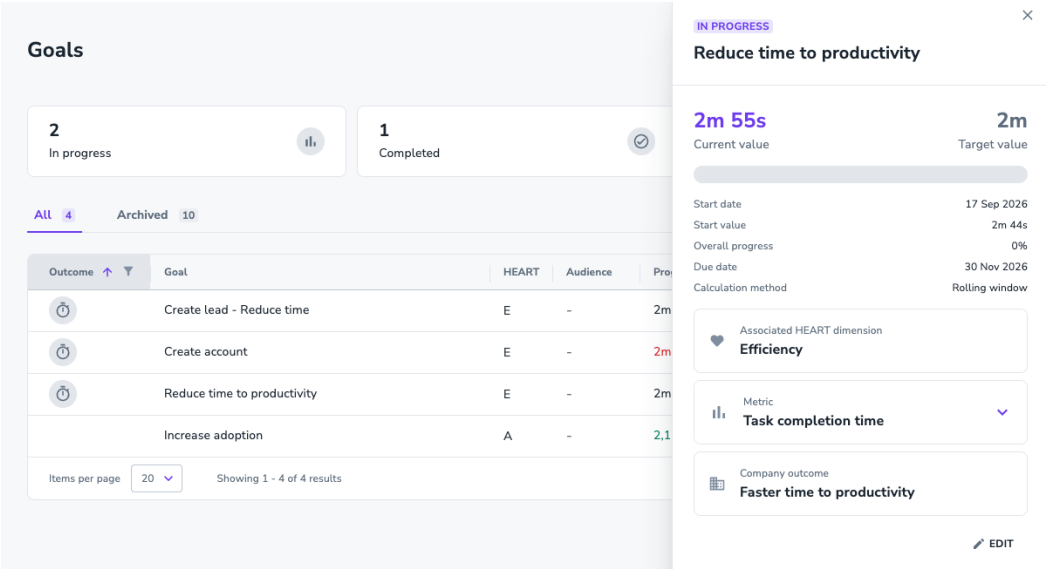
The Goals page shows all active goals for the current application. Each row displays:

- **Targeted outcome**
- **Goal name**
- **Associated HEART dimension**
- The Audience applied, if any
- A progress bar for in-progress goals, or a current/target value pair with a status badge for completed and overdue goals
- **Due date**

Three summary cards at the top of the page show the current count of in-progress, completed, and overdue goals.

Click any row to open the goal detail drawer on the right side of the page. The drawer shows the full progress record: start value, current value, target, due date, metric, and Audience.

Archived goals are available in the **Archived** tab. They are read-only and cannot be reactivated.



Goal statuses

- In progress - Due date has not passed and target has not been reached
- Completed - Due date has passed and target has been met or exceeded
- Overdue - Due date has passed and target has not been reached
- Archived - Goal has been closed manually or automatically

Editing and archiving goals

Extending a due date: Open the goal detail drawer, click **Edit**, and select **Extend due date**. Set a new date and confirm. Extending the due date of an overdue goal resets its status to In progress.

Archiving a goal: For completed and overdue goals, open the goal detail drawer and click **Archive goal**. For goals in progress, open the goal detail drawer, click **Edit**, and select **Archive goal**. Archived goals move to the Archived tab and cannot be edited or reactivated.

Goals are archived automatically 30 days after the due date passes without the target being reached, and 30 days after completion if not archived manually.

The target value, metric, and start value cannot be changed after creation. To change the scope of what is being measured, archive the existing goal and create a new one.