Understanding…

Goal Ordering on a PM Form

Last updated July 6, 2009 by Anthony Johnson

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**Note:** This document describes how goals are ordered on a PM form and why that order may be different from the goal plan.

# Frequently Asked Questions

**Below are answers to some frequently asked questions when it comes to how goals are ordered on a PM form. Keep these in mind to fully understand why goals on a PM form might not be ordered as you are expecting.**

**Note: It is recommended that your goal plan always include a category. This can be defined as a category element, enum value or using the default-category element. Even though you may not use categories or show categories, having one set is best practice, and will prevent some of the confusing examples shown below from occurring. Categories only show when you have 2 or more, so setting 1 default category will not impact your end user.**

* **Q. Can I force a certain order for the goals on a PM form?**
	+ No. Currently goal ordering follows defined rules. The only control the user has in ordering goals therefore is to enter goals based on those rules.
* **Q. Why can’t goals simply be ordered by the user via the goal plan’s up and down arrows?**
	+ A. If a user did reorder their goals on the goal plan, this would affect the PM Form, however not all clients have the goal plan visible. Because some clients hide the goal plan there may be no ability for the user to access the plan to control the goal order.
* **Are goals ordered in the order I enter them? (First to last)**
	+ Not really. Unless you have preplanned how you are going to enter them, goals are not likely to end up in the order you are entering them.
* **What is the logic used to order goals?**
	+ Category, Order ID, Name, Number. Within Name the rules are numbers first, then capital letters, lastly lowercase letters (CUT comes before Cat)

# C:\Documents and Settings\ajohnson\Local Settings\Temporary Internet Files\Content.IE5\PMH9LWS9\MCj04395860000[1].pngGOAL ORDERING RULES

* **If there are no categories (default-objective) set on the goal plan it will order by goal name (objective\_name). Goals appear alphabetically, and not in the order entered.**
	1. **Within OBJECTIVE\_NAME there are additional rules.**
		+ **Numbers first,**
		+ **then CAPS,**
		+ **then lowercase.**
		+ **Example order on goal names: 123goal, 456goal, AGOALS, Agoal**
* **If there are categories it will order by > OBJECTIVE\_CATEGORY followed by OBJ\_ORDER (hidden value), OBJECTIVE\_NAME.**
	1. **Goals appear to be in the order you enter them, within categories.**

| I enter goal in this order | OBJECTIVE\_CATEGORY | **OBJ\_ORDER (hidden value)** | **OBJECTIVE\_NAME** | **OBJECTIVE\_ID(hidden value)** | **GOAL NO.** |
| --- | --- | --- | --- | --- | --- |
|  | Cat A, Cat B, etc. | 1,1,1,2,3 | My Goal | 1001, 1002, etc | 1.1, 1.2, 1.3 etc |
| **Example 1: Has categories, all Cats same, so will order as entered (objective\_id)**  |
| 1 | Cat A | 1 | D Goal | 1001 | 1.1 |
| 2 | Cat A | 2 | B Goal | 1002 | 1.2 |
| 3 | Cat A | 3 | C Goal | 1003 | 1.3 |
| 4 | Cat A | 4 | A Goal | 1004 | 1.4 |

| **I enter goal in this order** | **OBJECTIVE\_CATEGORY** | **OBJ\_ORDER (hidden value)** | **OBJECTIVE\_NAME** | **OBJECTIVE\_ID(hidden value)** | **GOAL NO.** |
| --- | --- | --- | --- | --- | --- |
|  | Cat A, Cat B, etc. | 1,1,1,2,3 | My Goal | 1001, 1002, etc | 1.1, 1.2, 1.3 etc |
| **Example 2: What occurs if I manually force “C Goal” to top via the goal plan, will order by force (objective\_order)**  |
| 3 | Cat A | 1 | C Goal | 1003 | 1.1 |
| 1 | Cat A | 2 | D Goal | 1001 | 1.2 |
| 2 | Cat A | 3 | B Goal | 1002 | 1.3 |
| 4 | Cat A | 4 | A Goal | 1004 | 1.4 |

| **I enter goal in this order** | **OBJECTIVE\_CATEGORY** | **OBJ\_ORDER (hidden value)** | **OBJECTIVE\_NAME** | **OBJECTIVE\_ID(hidden value)** | **GOAL NO.** |
| --- | --- | --- | --- | --- | --- |
|  | If there are no categories | 1,1,1,2,3 | Note how capitals affect order | 1001, 1002, etc | 1.1, 1.2, 1.3 etc |
| **Example 3a: If there are no categories on goal plan it will order by goal name (objective\_name) – see rules above. Note that OBJ\_ORDER are all 1’s** |
| 4 |  | 1 | A Goal | 1004 | 1.1 |
| 2 |   | 1 | A goal | 1002 | 1.2 |
| 1 |  | 1 | B Goal | 1001 | 1.3 |
| 3 |  | 1 | C Goal | 1003 | 1.4 |

| **I enter goal in this order** | **OBJECTIVE\_CATEGORY** | **OBJ\_ORDER (hidden value)** | **OBJECTIVE\_NAME** | **OBJECTIVE\_ID(hidden value)** | **GOAL NO.** |
| --- | --- | --- | --- | --- | --- |
|  | Cat A, Cat B, etc. | 1,1,1,2,3 | My Goal | 1001, 1002, etc | 1.1, 1.2, 1.3 etc |
| **Example 3b: What occurs if I manually force “C Goal” to top via the goal plan, will order by force (objective\_order) Note how the OBJ\_ORDER “1’s” have now changed to 1,2,3,4** |
| 1 |  | 1 | B Goal | 1001 | 1.1 |
| 4 |  | 2 | A Goal | 1004 | 1.2 |
| 2 |  | 3 | A goal | 1002 | 1.3 |
| 3 |  | 4 | C Goal | 1003 | 1.4 |

| **I enter goal in this order** | **OBJECTIVE\_CATEGORY** | **OBJ\_ORDER (hidden value)** | **OBJECTIVE\_NAME** | **OBJECTIVE\_ID(hidden value)** | **GOAL NO.** |
| --- | --- | --- | --- | --- | --- |
|  | Cat A, Cat B, etc. | 1,1,1,2,3 | My Goal | 1001, 1002, etc | 1.1, 1.2, 1.3 etc |
| **Example 4: Multiple categories, last goal entered goes first since it is in Cat A. 1st goal entered goes last since it is in Cat C. Also note how OBJ\_ORDER works.** |
| 4 | Cat A | 1 | D Goal | 1004 | 1.1 |
| 2 | Cat B | 1 | C Goal | 1002 | 2.1 |
| 3 | Cat B | 2 | B goal | 1003 | 2.2 |
| 5 | Cat B | 3 | A Goal | 1005 | 2.3 |
| 1 | Cat C | 1 | A Goal | 1001 | 3.1 |

| **I enter goal in this order** | **OBJECTIVE\_CATEGORY** | **OBJ\_ORDER (hidden value)** | **OBJECTIVE\_NAME** | **OBJECTIVE\_ID(hidden value)** | **GOAL NO.** |
| --- | --- | --- | --- | --- | --- |
|  | If there are no categories | Note the values | Note how capitals affect order | 1001, 1002, etc | 1.1, 1.2, 1.3 etc |
| **Example 5: If a client has no default-category set then it is possible to get mixed results that can be confusing. Ordering both on OBJ\_ORDER and by goal name (objective\_name) – see rules above.** |
| 7 | This goal was added last to the PM form but is first based on name—was added at a later time after the force ordering for other goals so gets obj\_order value of 1 | 1 | A Goal | 1007 | 1.1 |
| 6 |  | 1 | A goal | 1006 | 1.2 |
| 5 |  | 1 | a Goal | 1005 | 1.3 |
| 4 | The following were force ordered via the goal plan so now have an obj\_order value | 1 | G Goal | 1004 | 1.4 |
| 2 | “” | 2 | 1 Goal | 1002 | 1.5 |
| 1 | “” | 3 | 6 Goal | 1001 | 1.6 |
| 3 | “” | 4 | 2 Goal | 1003 | 1.7 |