



AUGUSTA UNIVERSITY

Anthology/Campus Labs Planning Module User Guide
for
Unit Planning

Division of Institutional Effectiveness

augusta.edu/ie

Spring 2022

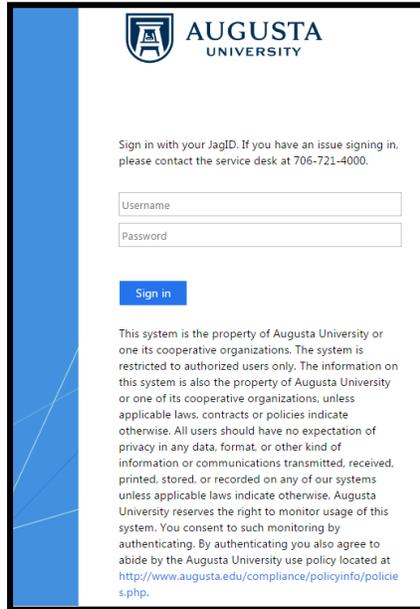
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Note: Use the Bookmark feature to locate specific areas of support.

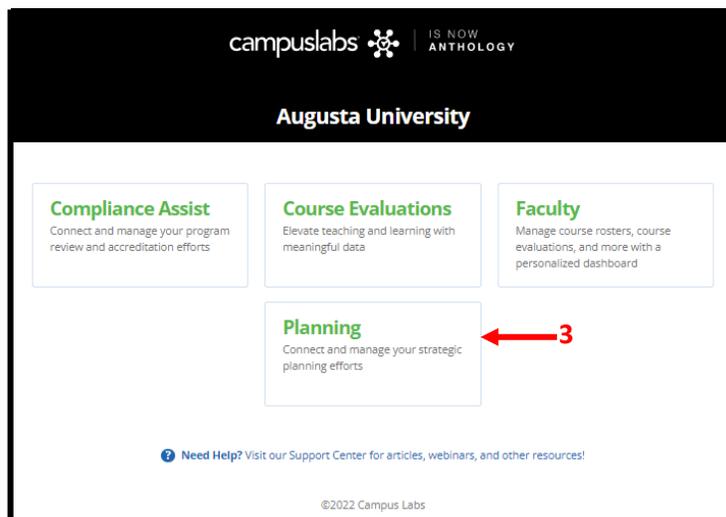
BASIC LOGIN/LOGOUT INFORMATION

1. To get started, open your internet browser and go to:
<https://augusta.campuslabs.com/planning>.
(This link is also available on the Institutional Effectiveness website at www.augusta.edu/ie.)
2. You will then be brought to the AU portal. Enter your Jag/NetID and password at this screen:

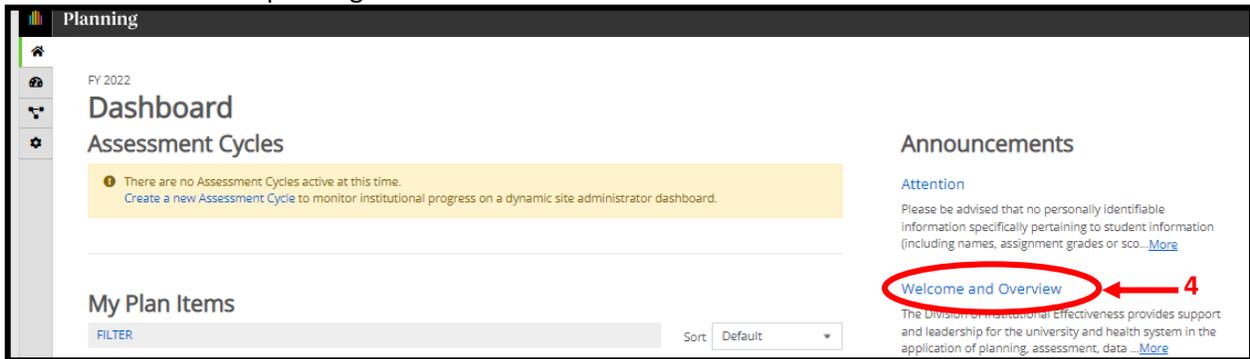


TIP: If you need assistance with your Jag/NetID password or to have it reset, please contact the ITS Service Desk at 706-721-4000

3. Once you have logged in, you will be taken to the following landing page. Click **Planning** to be taken into the Planning module:

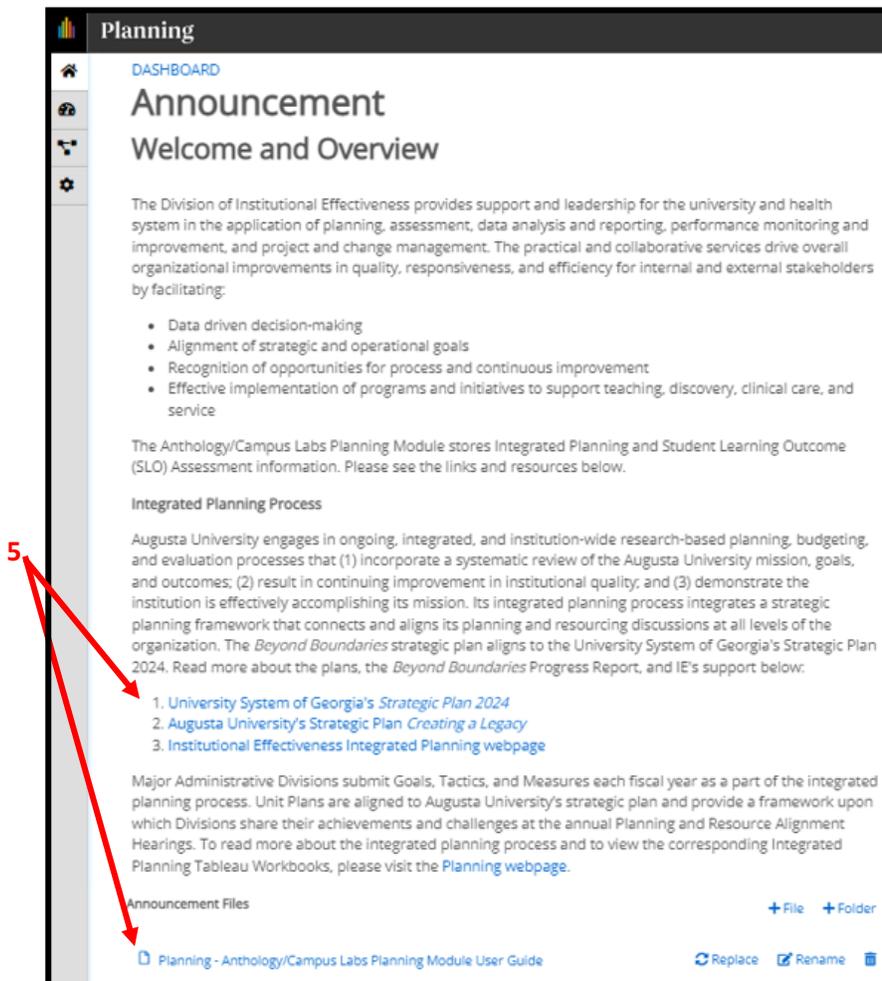


4. Additional announcements and documents relevant to the planning process are located in the Announcements section. Click **Welcome and Overview** to access the Announcements section and its corresponding resources.



The screenshot shows the 'Planning' dashboard for FY 2022. It features a sidebar with navigation icons, a main content area with 'Dashboard' and 'Assessment Cycles' sections, and an 'Announcements' section on the right. A yellow notification box states 'There are no Assessment Cycles active at this time.' The 'Announcements' section contains a message about personally identifiable information and a link for 'Welcome and Overview', which is circled in red with a red arrow and the number '4' pointing to it.

5. Helpful links and resources pertaining to planning and assessment are found on this page.



The screenshot shows the 'Announcement: Welcome and Overview' page. It includes a sidebar, a title, and a main text area. A red arrow labeled '5' points to a list of three links under the 'Integrated Planning Process' section:

1. [University System of Georgia's Strategic Plan 2024](#)
2. [Augusta University's Strategic Plan Creating a Legacy](#)
3. [Institutional Effectiveness Integrated Planning webpage](#)

Below the list, there is a section for 'Major Administrative Divisions' and an 'Announcement Files' section at the bottom with a file named 'Planning - Anthology/Campus Labs Planning Module User Guide'.

6. To log out of the system, click on your name in the top right corner of your screen and then click **Sign Out**. Close your internet browser.



INPUTTING ANNUAL PLANS

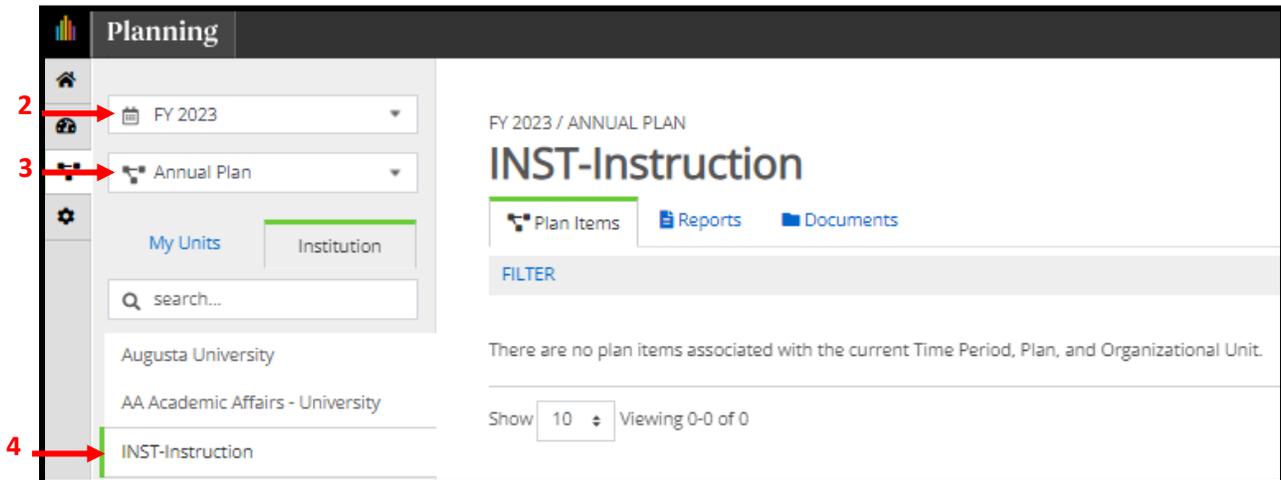
To begin entering your annual plans, you need to start by logging into the system. Click on *Planning* as described above.

- 1) Click on the **Plans** icon. 



- 2) Select the appropriate **Fiscal Year** from the drop-down list.
- 3) Select **Annual Plan** from the drop-down list.
- 4) Select the **Unit** (or department, if applicable) from the organizational structure on the left for which you are entering information.

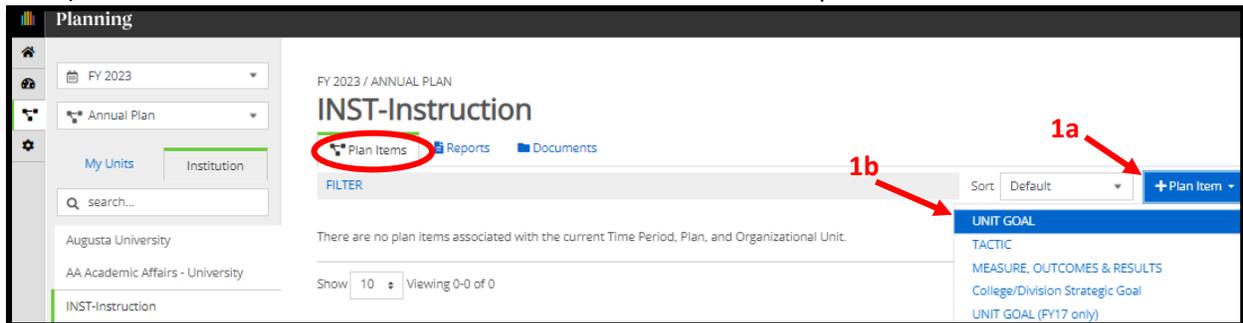
NOTE: You may need to click to locate your unit. For example, for INST-Instruction, click on AA Academic Affairs – University → INST-Instruction.



ENTERING UNIT/DEPARTMENT GOALS

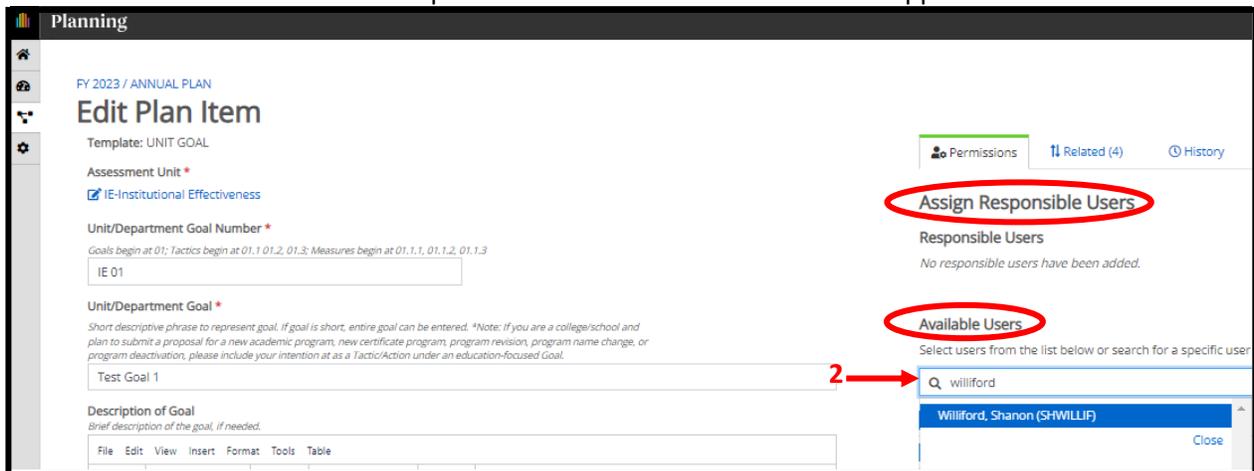
Once the unit is selected, the webpage defaults to the **Plan Items** tab.

- 1) Click on the **+ Plan Item** button and select the **Unit Goal** template.



Next, you will complete the **Unit Goal** template. The assessment unit will be generated at the top.

- 2) **Senior Responsible Leader:** Under the **Assign Responsible Users** → **Available Users** section, begin typing the last name of the Senior Responsible Leader. The system will begin to populate users. Select the Senior Responsible Leader when his or her name appears.

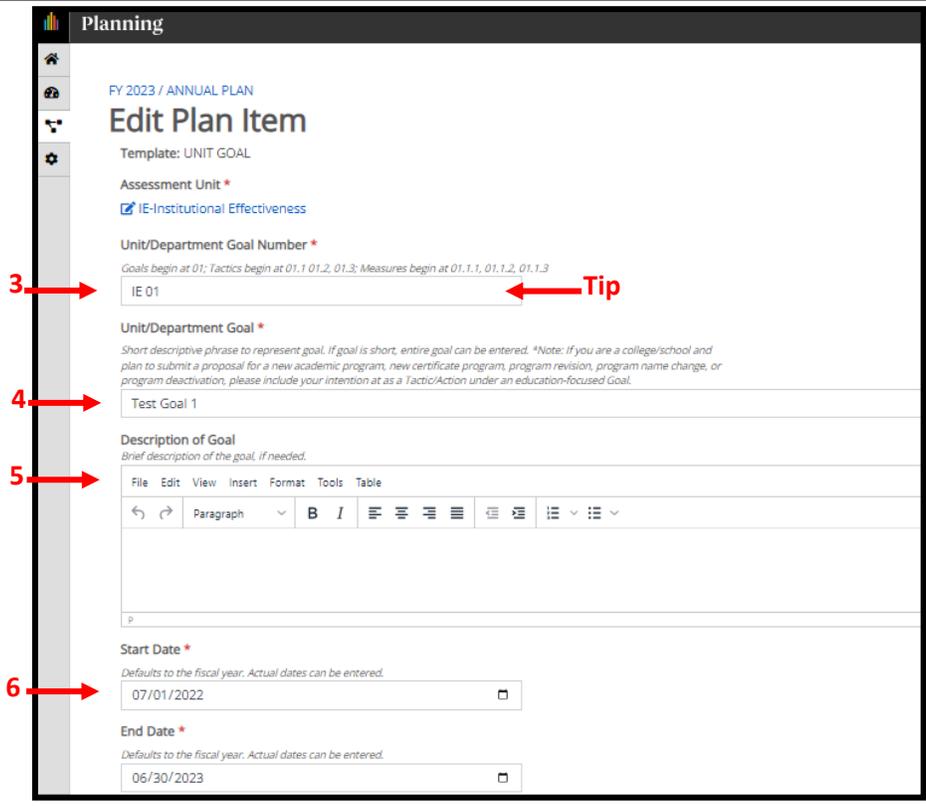


- 3) **Unit/Department Goal Number:** Enter the Unit Goal Number. This number derives from an abbreviation of your unit’s name (the abbreviation is included in the Assessment Unit) and the Goal number. Goals 1-9 should be preceded with a 0.

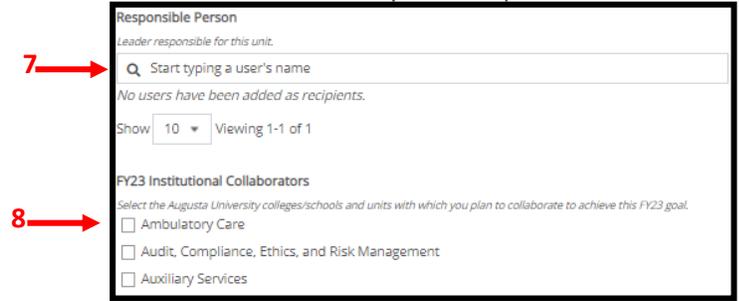
TIP: It is important to include the zero at the beginning of Goals 1-9 for the Goals to sort correctly. For Institutional Effectiveness, the Goal numbers would be IE 01, IE 02, . . . , IE 09, IE 10).

- 4) **Unit/Department Goal:** Enter your Unit/Department Goal. If you would like to add additional information to further describe your Goal, please do so by using the “Description of Goal” narrative box.
- 5) **Description of Goal:** (Optional) Provide a brief description of the Goal, if needed.
- 6) **Start Date and End Date:** The dates are pre-populated.

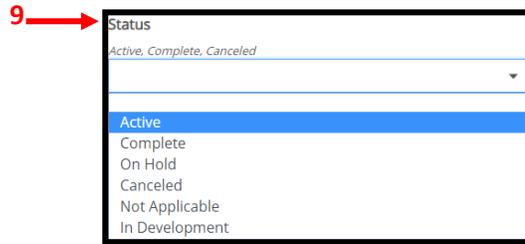
TIP: The new interface uses an auto-save feature.



- 7) **Responsible Person:** Begin typing the last name of the Responsible Person for this Goal. The system will begin to populate users. Select the Responsible Person when his or her name appears. Multiple people can be entered if needed.
- 8) **Institutional Collaborators:** From the list of **Institutional Collaborators**, select the colleges/schools and/or units with which your unit plans to collaborate to achieve this Goal.



- 9) **Status:** (*Optional*) Select the **Status** of the Goal. From the drop-down list, select whether this Goal is Active, Complete, On Hold, Canceled, Not Applicable, or In Development. (Refer to the legend below.)



NOTE: Select the Status based on the following legend:

Active – Showing Progress. The Goal/Tactic/Measure has been developed and is currently on schedule and actively being monitored.

Complete – All necessary elements of the Goal/Tactic/Measure do not require any more work or are entirely done/complete.

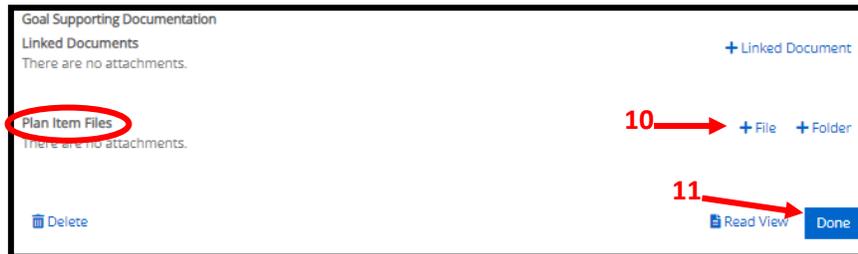
On Hold – Actions pertaining to this Goal/Tactic/Measure are currently suspended until further notice.

Canceled – The Goal/Tactic/Measure is no longer attainable and requires no further action.

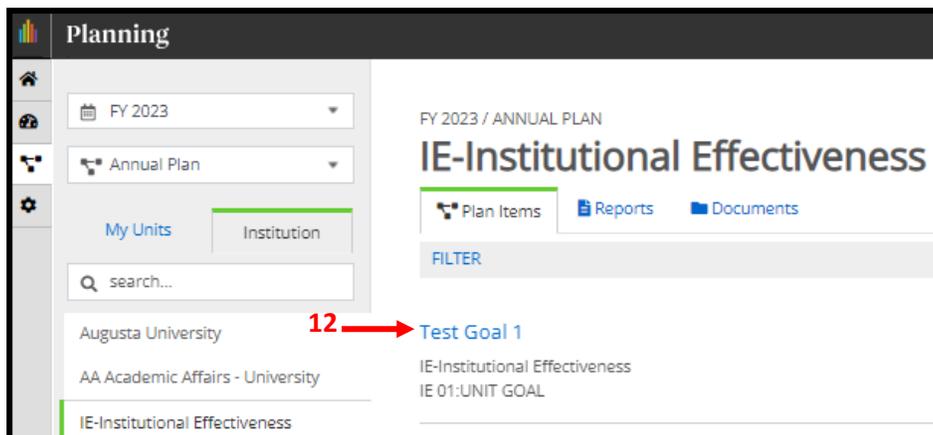
Not Applicable – The Goal/Tactic/Measure is no longer applicable and requires no further action.

In Development – The Goal/Tactic/Measure is in the early stage of development and requires further development/attention.

- 10) **Supporting Documentation:** (*Optional*) Under the Plan Item Files section, click on **+ File**. Select the document you wish to upload. Repeat this process until all documents are uploaded.
- 11) **Finish:** Click **Done**. (There is no “Save” option since the system has an auto-save feature.)

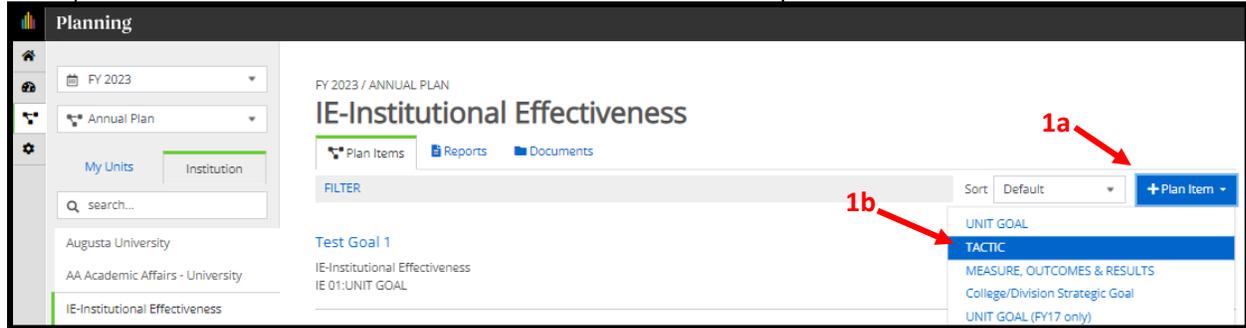


- 12) **Editing:** To edit the Goal you just created, click on the item. Make edits to any of the fields, and click Done at the bottom of the screen.



ENTERING TACTICS

- 1) Click on the **+ Plan Item** button and select the **Tactic** template.

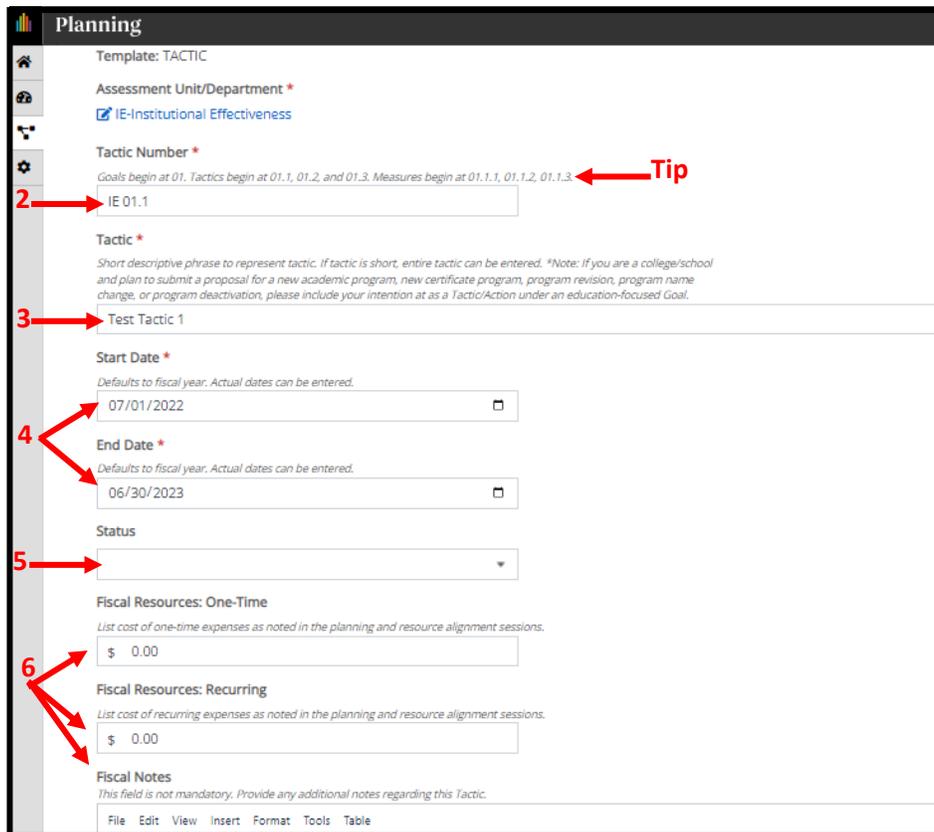


Next, you will complete the **Tactic** template.

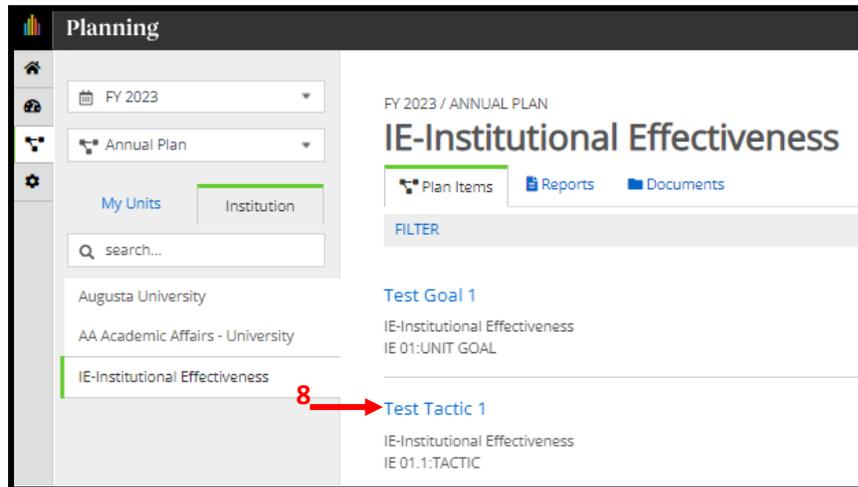
- 2) **Tactic Number:** Enter the Tactic Number. This number derives from the Goal that this Tactic supports. The first Tactic will be the Goal number followed by a 1.

TIP: It is important to include the zero at the beginning of the Tactic Number for the Tactics to sort correctly. For Institutional Effectiveness, the Tactic Numbers would be IE 01.1, IE 01.2, . . . , IE 09.1, IE 09.2).

- 3) **Tactic:** Enter your Unit/Department Tactic. This is a short, descriptive phrase to represent the Tactic.
- 4) **Start Date and End Date:** The dates are pre-populated.
- 5) **Status:** (*Optional*) Select the **Status** of the Tactic. From the drop-down list, select whether this Tactic is Active, Complete, On Hold, Canceled, Not Applicable, or In Development. (Reference the Status legend on page 9 of this user guide.)
- 6) **Fiscal Info:** (*Optional*) Record any one-time expenses, recurring expenses, and/or notes.
- 7) **Finish:** Click **Done**. (There is no “Save” option since the system has an auto-save feature.)

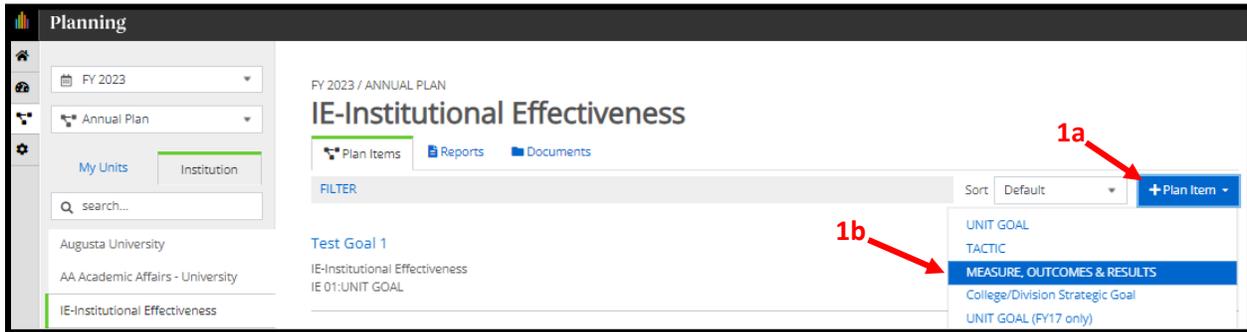


- 8) **Editing:** To edit the Tactic you just created, click on the item. Make edits to any of the fields, and click Done at the bottom of the screen.



ENTERING MEASURES

- 1) Click on the **+ Plan Item** button and select the **Measures, Outcomes & Results** template.

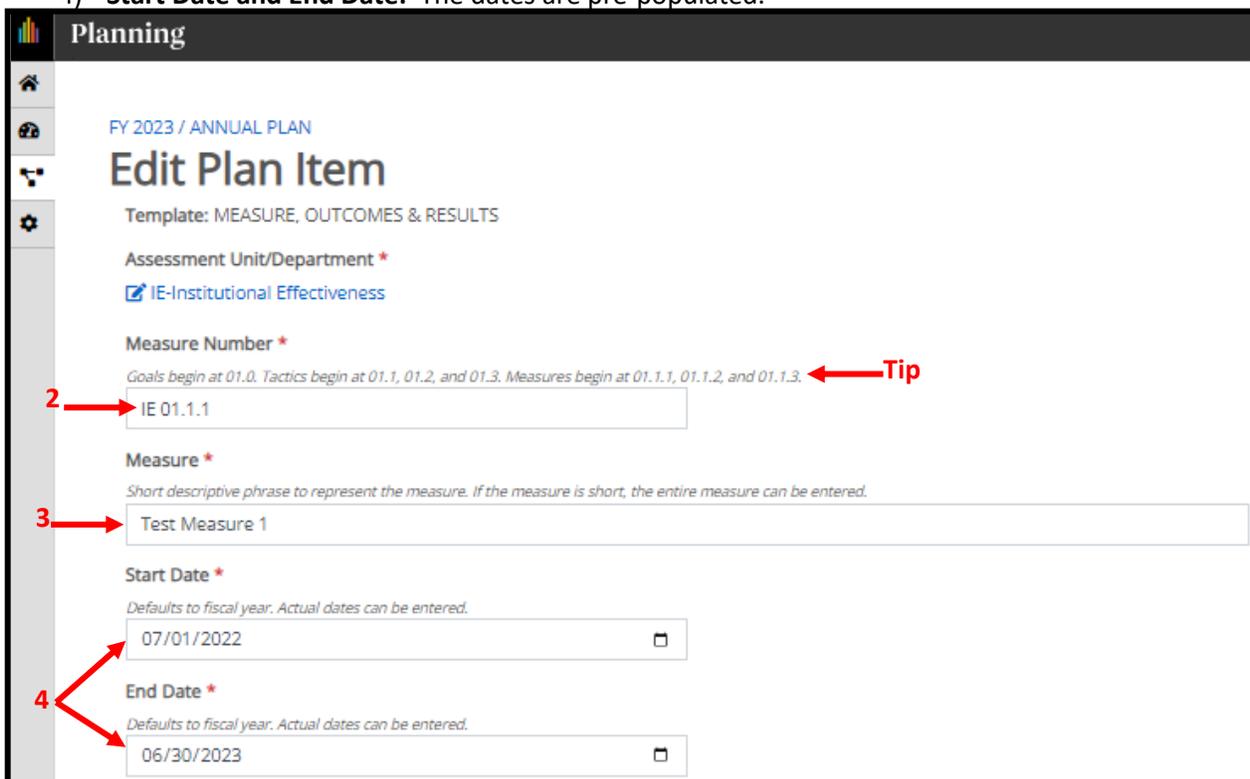


Next, you will complete the **Measures, Outcomes & Results** template. The assessment unit will be generated at the top.

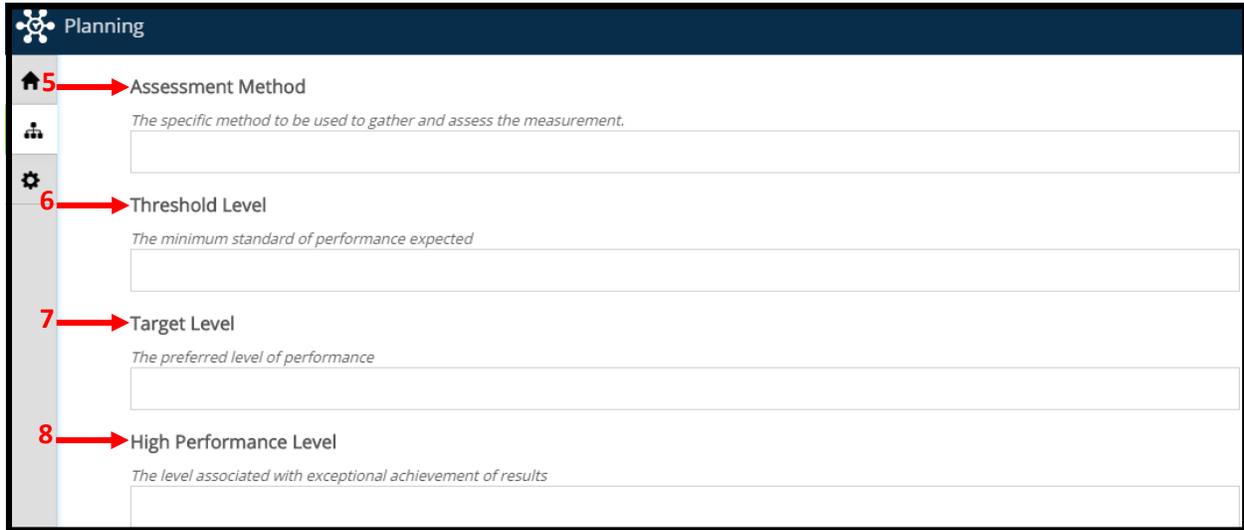
- 2) **Measure Number:** This number derives from that of your Goal and Tactic. If you have one Measure, you will add a 1 to the number used for the Goal and Tactic (Ex: **IE 01.1.1** if you have a third Measure, it will be labeled as **IE 01.1.3**.)

TIP: It is important to include the zero at the beginning of the Measure Number for the Measures to sort correctly. For Institutional Effectiveness, the Measure Numbers would be IE 01.1.1, IE 01.1.2 (support Tactic IE 01.1) and IE 01.2.1, IE 01.2.2 (support Tactic IE 01.2).

- 3) **Measure:** Enter your Unit/Department Measure. This is a short, descriptive phrase to represent your Measure.
- 4) **Start Date and End Date:** The dates are pre-populated.



- 5) **Assessment Method:** Enter the specific method to be used to gather and assess the Measure (i.e. date driven, surveys, quality measures, responsive measures, etc.).
- 6) **Threshold Level:** Enter the minimum standard of performance expected.
- 7) **Target Level:** Enter the preferred level of performance.
- 8) **High Performance Level:** Enter the level associated with exceptional achievement of results.



Planning

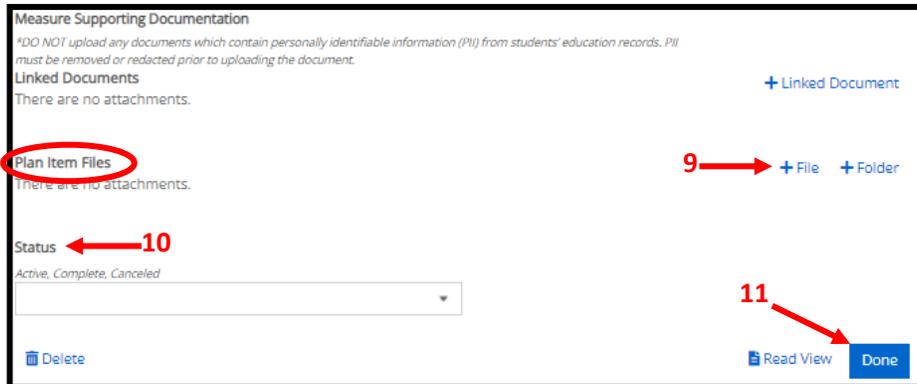
5 → **Assessment Method**
The specific method to be used to gather and assess the measurement.

6 → **Threshold Level**
The minimum standard of performance expected

7 → **Target Level**
The preferred level of performance

8 → **High Performance Level**
The level associated with exceptional achievement of results

- 9) **Supporting Documentation:** (Optional) Scroll to the bottom to the Plan Item Files section, click on **+ File**. Select the document you wish to upload. Repeat this process until all documents are uploaded.
- 10) **Status:** (Optional) Select the **Status** of the Goal. From the drop-down list, select whether this Goal is Active, Complete, On Hold, Canceled, Not Applicable, or In Development. (Reference the Status legend on page 9 of this user guide.)
- 11) **Finish:** Click **Done**. (There is no “Save” option since the system has an auto-save feature.)



Measure Supporting Documentation
*DO NOT upload any documents which contain personally identifiable information (PII) from students' education records. PII must be removed or redacted prior to uploading the document.

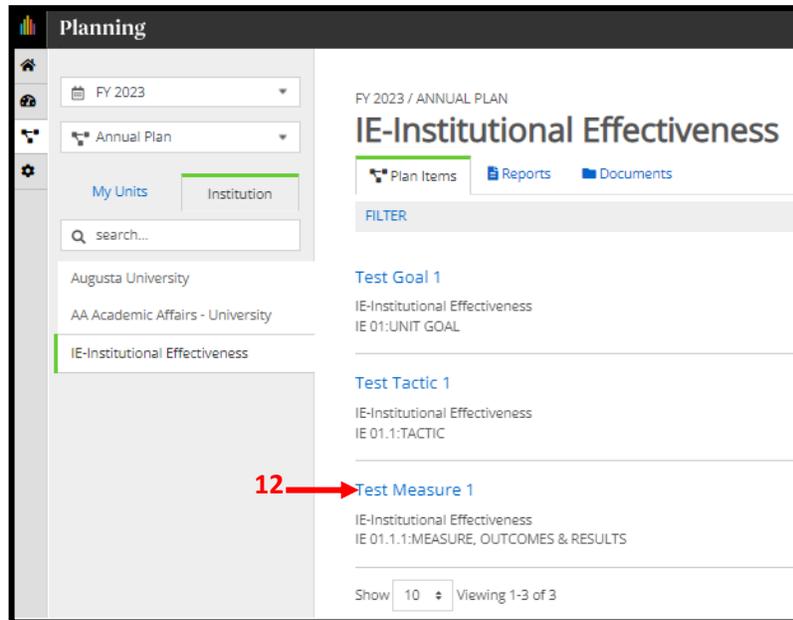
Linked Documents + Linked Document
 There are no attachments.

Plan Item Files **9** → + File + Folder
 There are no attachments.

Status **11** → Done
Active, Complete, Canceled

Delete Read View Done

12) **Editing:** To edit the Measure you just created, click on the item. Make edits to any of the fields, and click Done at the bottom of the screen.

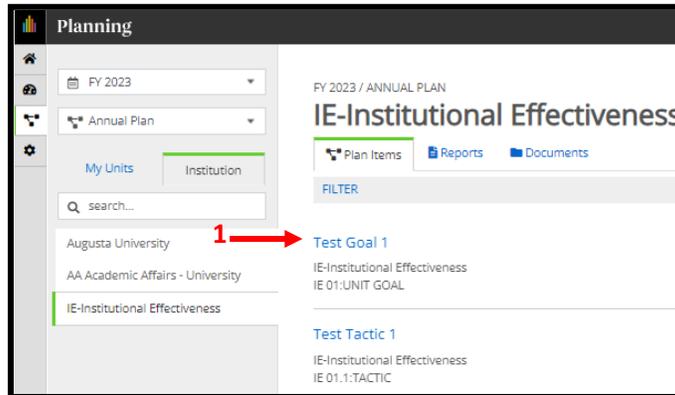


RELATING ITEMS

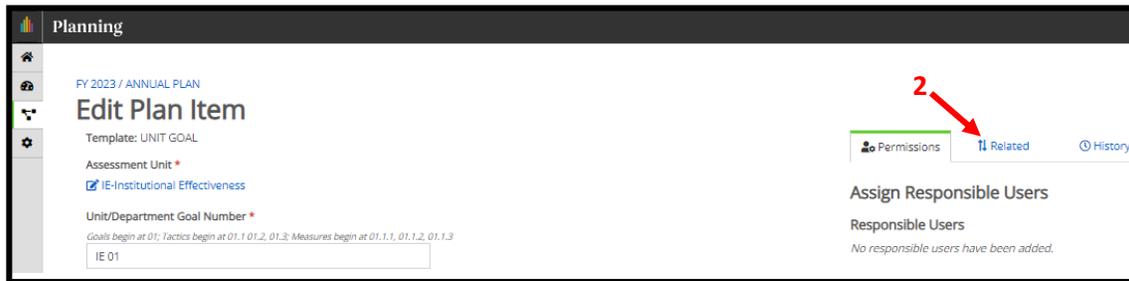
The next step is to relate Goals to Augusta University’s strategic plan *Creating a Legacy* and to relate Goals, Tactics, and Measures to each other.

RELATING GOALS

- 1) Click on your first Goal.

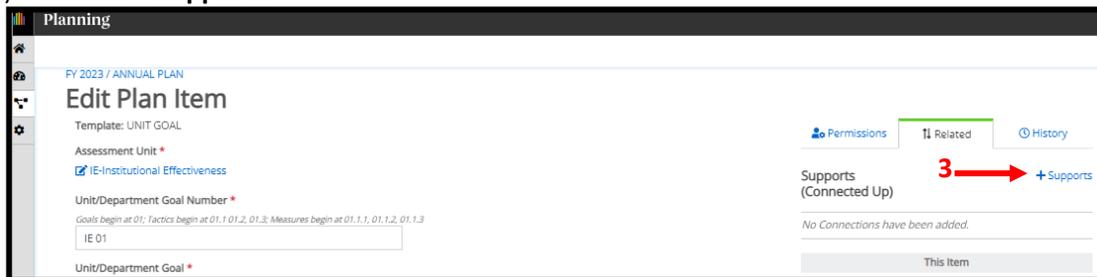


- 2) Click on the **Related** tab.

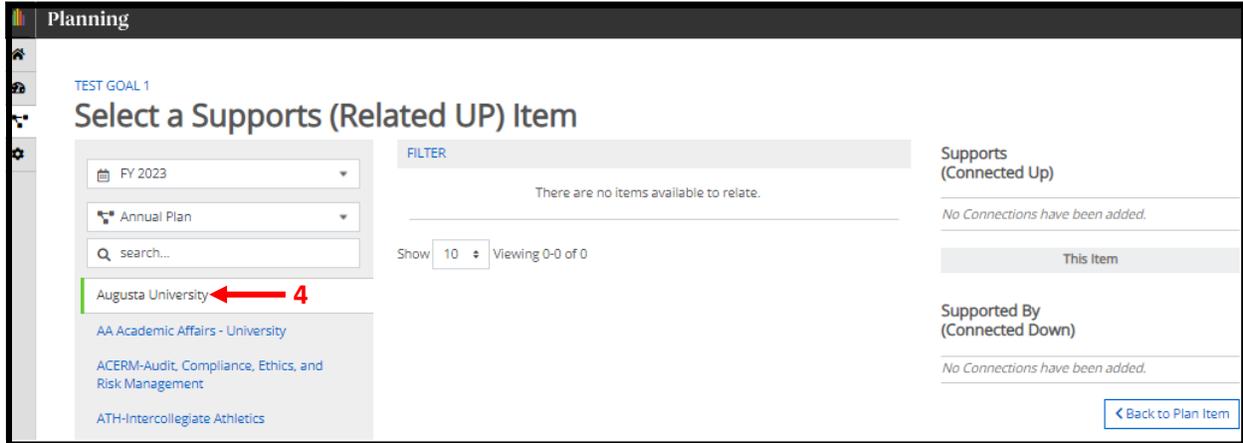


First, relate the Goal to *Creating a Legacy* Distinguishing Objective(s).

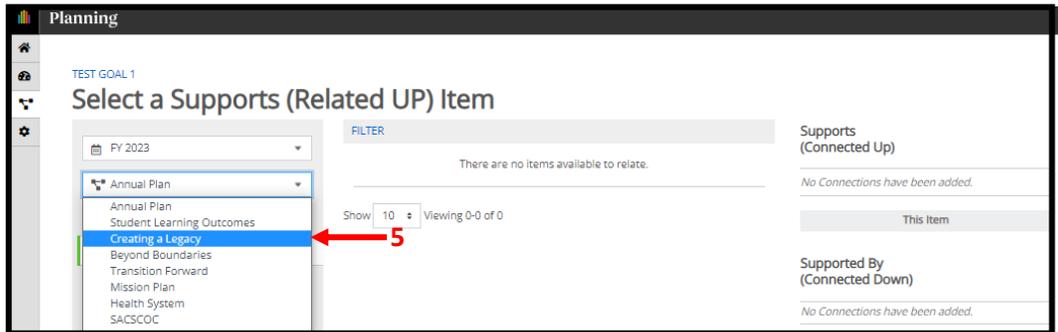
- 3) Click on **+ Supports**.



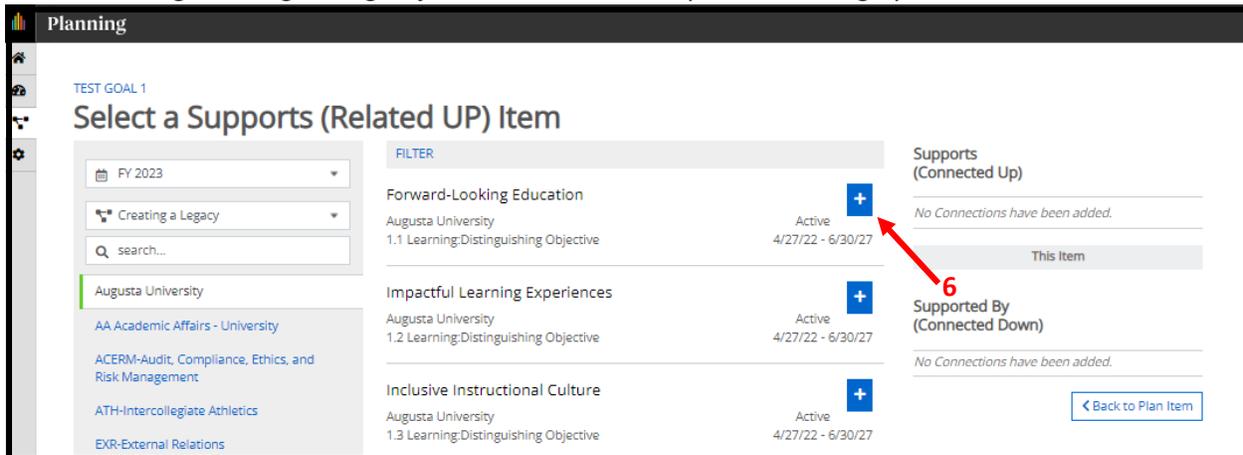
- 4) The screen should default to where Augusta University is selected on the left side of the screen. If it is not, select **Augusta University**.



- 5) Select **Creating a Legacy** from the drop-down list on the left side of the screen.

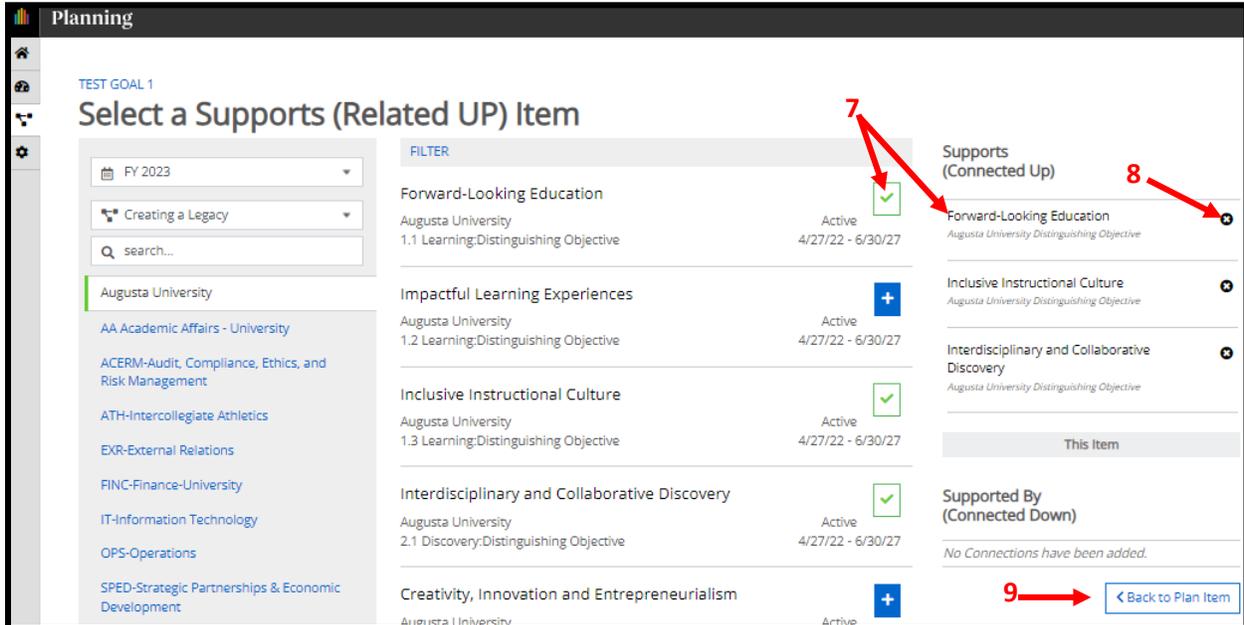


- 6) Scroll through the list of *Creating a Legacy* Distinguishing Objectives to locate the Strategic Distinguishing Objective(s) to which you wish to relate your Goal. Click the **+** symbol or the Strategic Distinguishing Objective's title to which you wish to align your Goal.



TIP: You may relate your Goal to more than one Strategic Distinguishing Objective. Also, if your Goal is directed toward compliance, select “Unit Goal focuses on compliance efforts.” If your Goal is operational, select “Unit Goal focuses on operational efforts.”

- 7) Once the Strategic Distinguishing Objective(s) is(are) selected, the  symbol will become a  symbol. The Strategic Distinguishing Objective(s) will appear on the right side of the screen.
- 8) To remove a Strategic Distinguishing Objective that has been selected, click the  symbol.
- 9) Once all Strategic Distinguishing Objectives have been selected, click **< Back to Plan Item**.



Planning

TEST GOAL 1

Select a Supports (Related UP) Item

FY 2023

Creating a Legacy

search...

Augusta University

- AA Academic Affairs - University
- ACERM-Audit, Compliance, Ethics, and Risk Management
- ATH-Intercollegiate Athletics
- EXR-External Relations
- FINC-Finance-University
- IT-Information Technology
- OPS-Operations
- SPED-Strategic Partnerships & Economic Development

FILTER

Forward-Looking Education
Augusta University
1.1 Learning:Distinguishing Objective
Active
4/27/22 - 6/30/27

Impactful Learning Experiences
Augusta University
1.2 Learning:Distinguishing Objective
Active
4/27/22 - 6/30/27

Inclusive Instructional Culture
Augusta University
1.3 Learning:Distinguishing Objective
Active
4/27/22 - 6/30/27

Interdisciplinary and Collaborative Discovery
Augusta University
2.1 Discovery:Distinguishing Objective
Active
4/27/22 - 6/30/27

Creativity, Innovation and Entrepreneurialism
Augusta University
Active

Supports (Connected Up)

- Forward-Looking Education**
Augusta University Distinguishing Objective
- Inclusive Instructional Culture**
Augusta University Distinguishing Objective
- Interdisciplinary and Collaborative Discovery**
Augusta University Distinguishing Objective

This Item

Supported By (Connected Down)

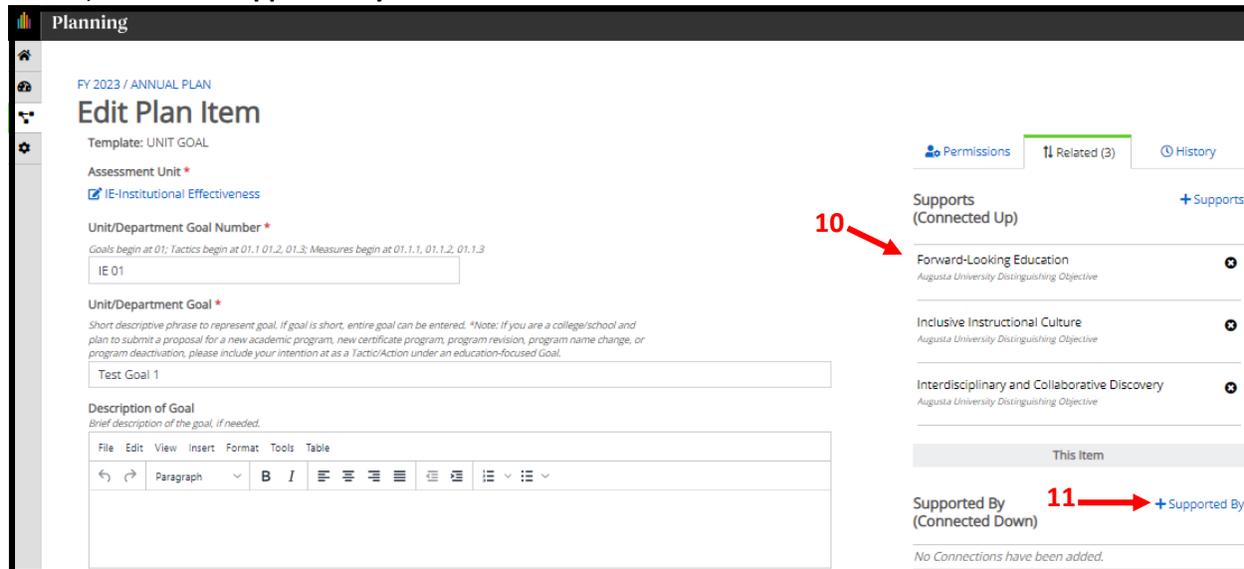
No Connections have been added.

< Back to Plan Item

- 10) The alignment now appears on the right side of the screen under the Supports (Connected Up) section.

Next, relate the Goal to its corresponding Tactics.

- 11) Click on **+ Supported By**



Planning

FY 2023 / ANNUAL PLAN

Edit Plan Item

Template: UNIT GOAL

Assessment Unit *

- IE-Institutional Effectiveness

Unit/Department Goal Number *

Goals begin at 01; Tactics begin at 01.1 01.2, 01.3; Measures begin at 01.1.1, 01.1.2, 01.1.3

IE 01

Unit/Department Goal *

Short descriptive phrase to represent goal. If goal is short, entire goal can be entered. *Note: If you are a college/school and plan to submit a proposal for a new academic program, new certificate program, program revision, program name change, or program deactivation, please include your intention at as a Tactic/Action under an education-focused Goal.

Test Goal 1

Description of Goal

Brief description of the goal, if needed.

File Edit View Insert Format Tools Table

Paragraph B I

Supports (Connected Up)

- Forward-Looking Education**
Augusta University Distinguishing Objective
- Inclusive Instructional Culture**
Augusta University Distinguishing Objective
- Interdisciplinary and Collaborative Discovery**
Augusta University Distinguishing Objective

This Item

Supported By (Connected Down)

No Connections have been added.

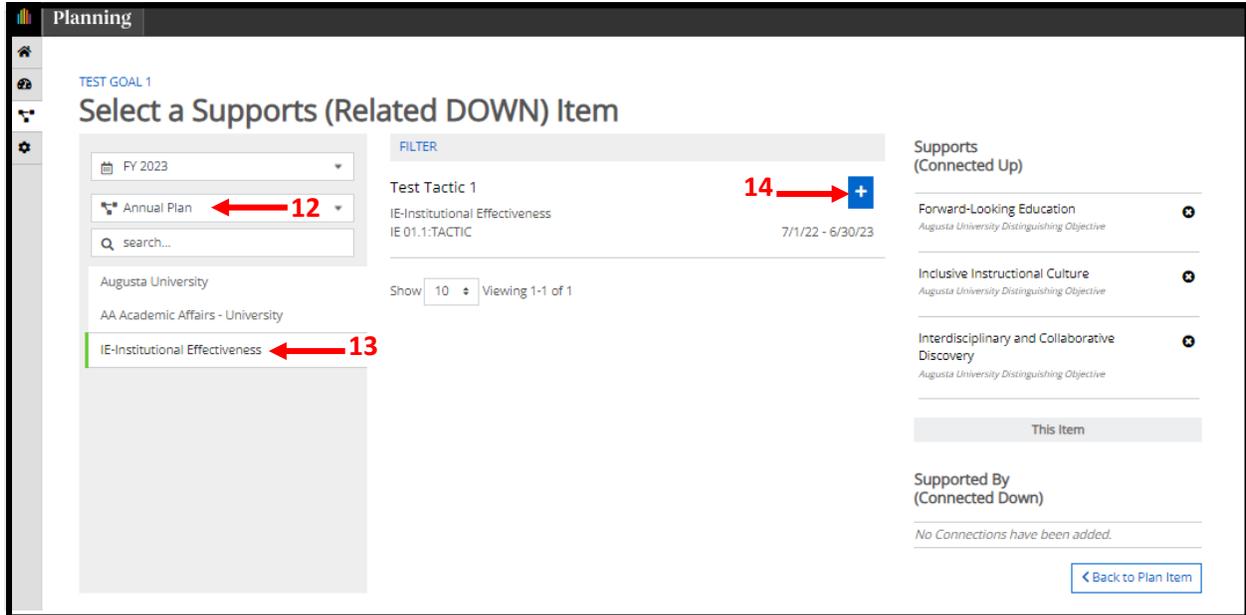
+ Supported By

12) The screen should default to where Annual Plan is selected on the left side of the screen. If it is not, select **Annual Plan** from the drop-down list.

13) The screen will default to where Augusta University is selected on the left side of the screen. Select the **Unit** for which you are entering information.

NOTE: If your unit is embedded in another, you will need to click through to locate your unit. For example, for INST-Instruction, click on AA Academic Affairs – University → INST-Instruction.

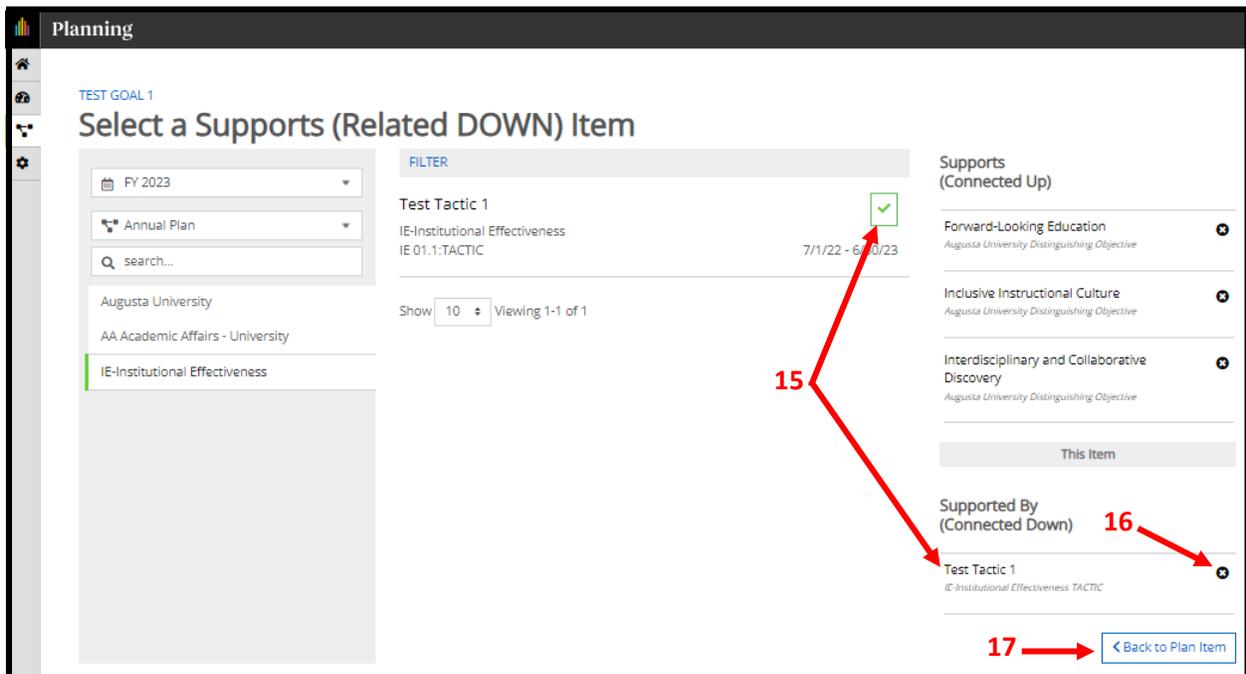
14) All of your unit’s Tactics will appear in the middle of the screen. As before, click the  symbol or the Tactic’s narrative to relate.



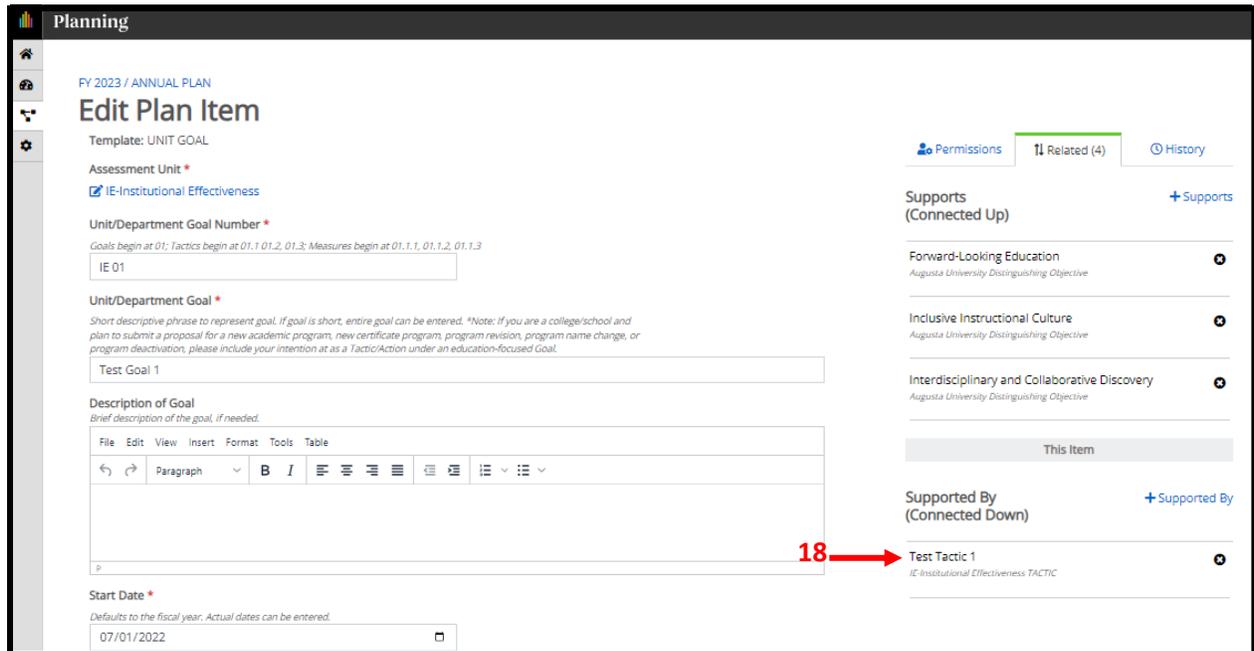
15) Once the Tactic(s) is(are) selected, the  symbol will become a  symbol. The Tactic(s) will appear on the right side of the screen.

16) To remove a Tactic which has been selected, click the  symbol.

17) Once all Tactics have been selected, click **< Back to Plan Item**.



18) The alignment now appears on the right side of the screen under the Supported By (Connected Down) section.



The screenshot displays the 'Edit Plan Item' interface within the 'Planning' system. The main content area includes the following sections:

- FY 2023 / ANNUAL PLAN**
- Edit Plan Item**
- Template:** UNIT GOAL
- Assessment Unit ***
IE-Institutional Effectiveness
- Unit/Department Goal Number ***
Goals begin at 01; Tactics begin at 01.1 01.2, 01.3; Measures begin at 01.1.1, 01.1.2, 01.1.3
IE 01
- Unit/Department Goal ***
Short descriptive phrase to represent goal. If goal is short, entire goal can be entered. *Note: If you are a college/school and plan to submit a proposal for a new academic program, new certificate program, program revision, program name change, or program deactivation, please include your intention as a Tactic/Action under an education-focused Goal.
Test Goal 1
- Description of Goal**
Brief description of the goal, if needed.
A rich text editor with a toolbar (File, Edit, View, Insert, Format, Tools, Table) and a text area containing the letter 'P'.
- Start Date ***
Defaults to the fiscal year. Actual dates can be entered.
07/01/2022

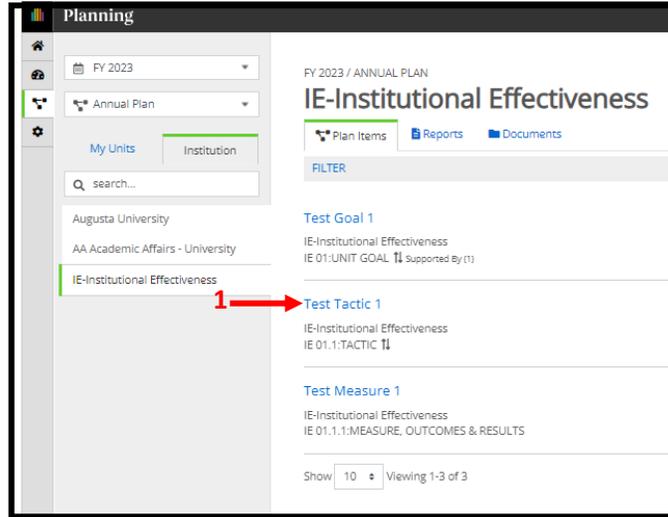
On the right side of the interface, there are three tabs: 'Permissions', 'Related (4)', and 'History'. Below these are two sections:

- Supports (Connected Up)** with a '+ Supports' link. It lists three items: 'Forward-Looking Education', 'Inclusive Instructional Culture', and 'Interdisciplinary and Collaborative Discovery', each with a circular icon.
- Supported By (Connected Down)** with a '+ Supported By' link. It lists one item: 'Test Tactic 1', which is highlighted in grey and has a red arrow pointing to it from the number '18' in the main content area.

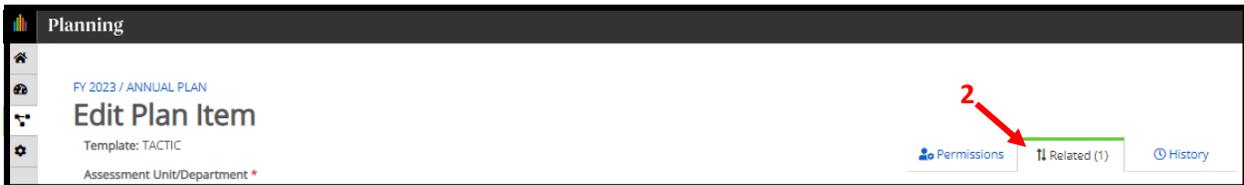
19) **Finish:** Click **Done** at the bottom of the screen. (There is no “Save” option since the system has an auto-save feature.)

RELATING TACTICS

- 1) Click on your first Tactic.

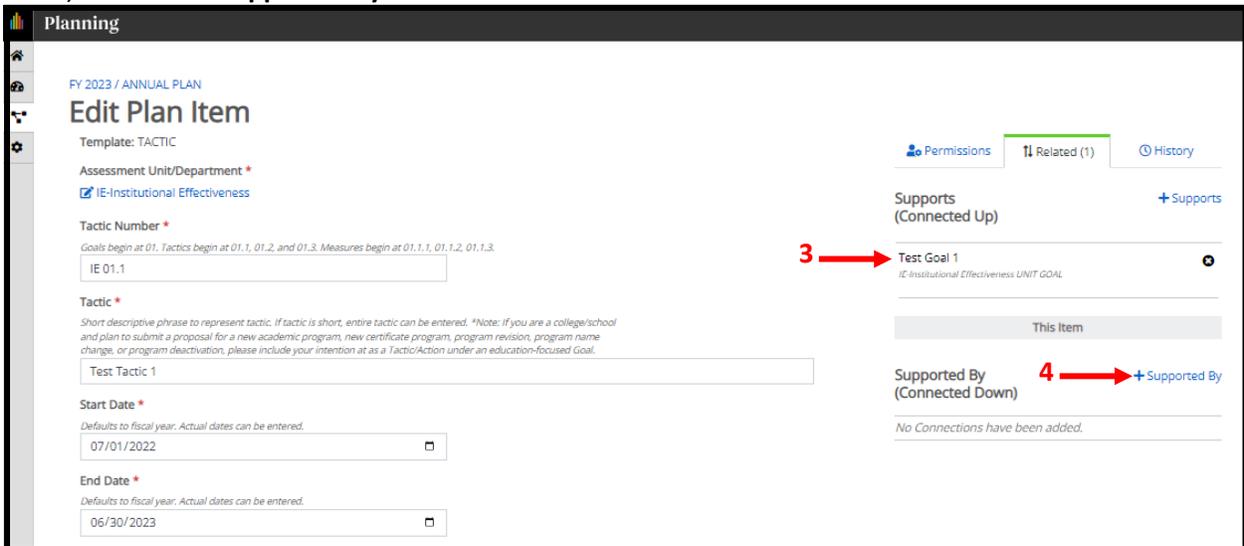


- 2) Click on the **Related** tab to relate the Tactic to its corresponding Measures.

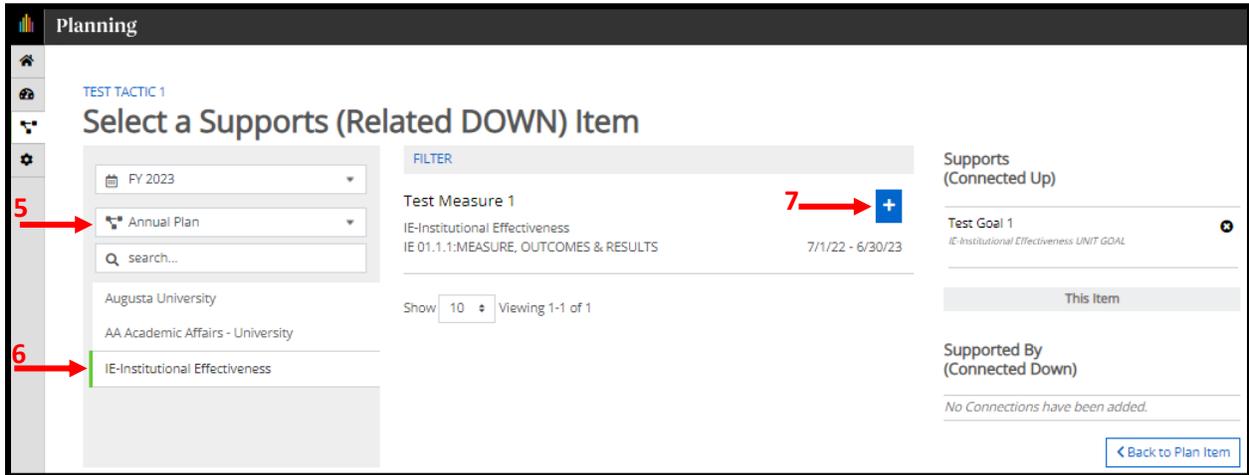


- 3) Based on the previous steps of relating your Goals to Tactics, the Supports (Connected Up) section should already be populated with its corresponding Goal.

- 4) Click on **+ Supported By**



- 5) Select **Annual Plan** from the drop-down list on the left side of the screen.
- 6) Select the **Unit** for which you are entering information.
- 7) All of your unit's Measures will appear in the middle of the screen. As before, click the  symbol or the Measure's narrative to relate.



Planning

TEST TACTIC 1

Select a Supports (Related DOWN) Item

FY 2023

Annual Plan

search...

Augusta University

AA Academic Affairs - University

IE-Institutional Effectiveness

FILTER

Test Measure 1

IE-Institutional Effectiveness

IE 01.1.1:MEASURE, OUTCOMES & RESULTS

7/1/22 - 6/30/23

Show 10 Viewing 1-1 of 1

Supports (Connected Up)

Test Goal 1

IE-Institutional Effectiveness UNIT GOAL

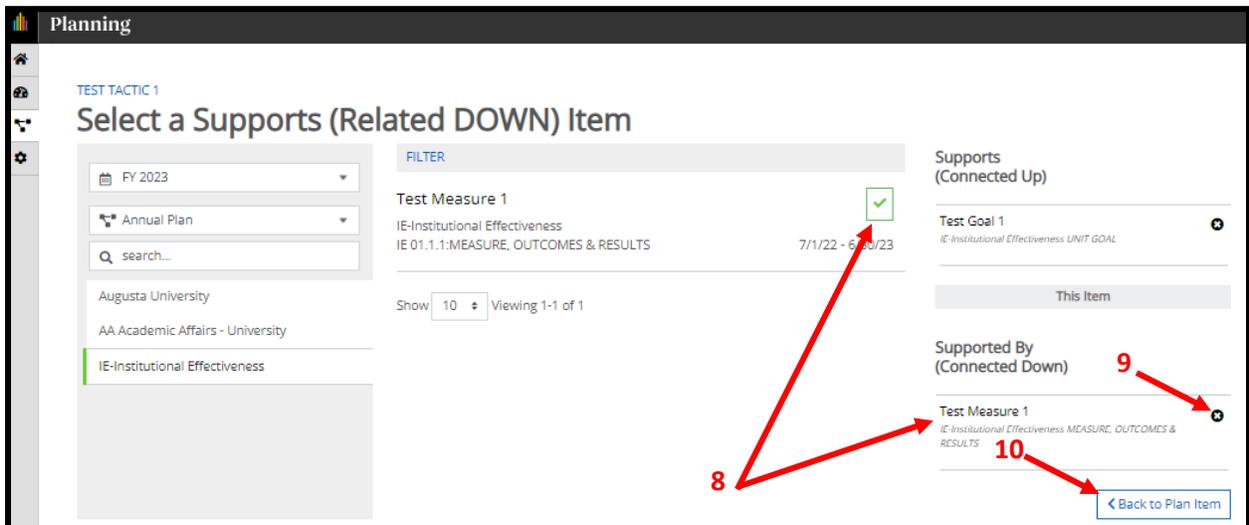
This Item

Supported By (Connected Down)

No Connections have been added.

[Back to Plan Item](#)

- 8) Once the Measure(s) is(are) selected, the  symbol will become a  symbol. The Measure(s) will appear on the right side of the screen.
- 9) To remove a Measure which has been selected, click the  symbol.
- 10) Once all Measures have been selected, click **< Back to Plan Item**.



Planning

TEST TACTIC 1

Select a Supports (Related DOWN) Item

FY 2023

Annual Plan

search...

Augusta University

AA Academic Affairs - University

IE-Institutional Effectiveness

FILTER

Test Measure 1

IE-Institutional Effectiveness

IE 01.1.1:MEASURE, OUTCOMES & RESULTS

7/1/22 - 6/30/23

Show 10 Viewing 1-1 of 1

Supports (Connected Up)

Test Goal 1

IE-Institutional Effectiveness UNIT GOAL

This Item

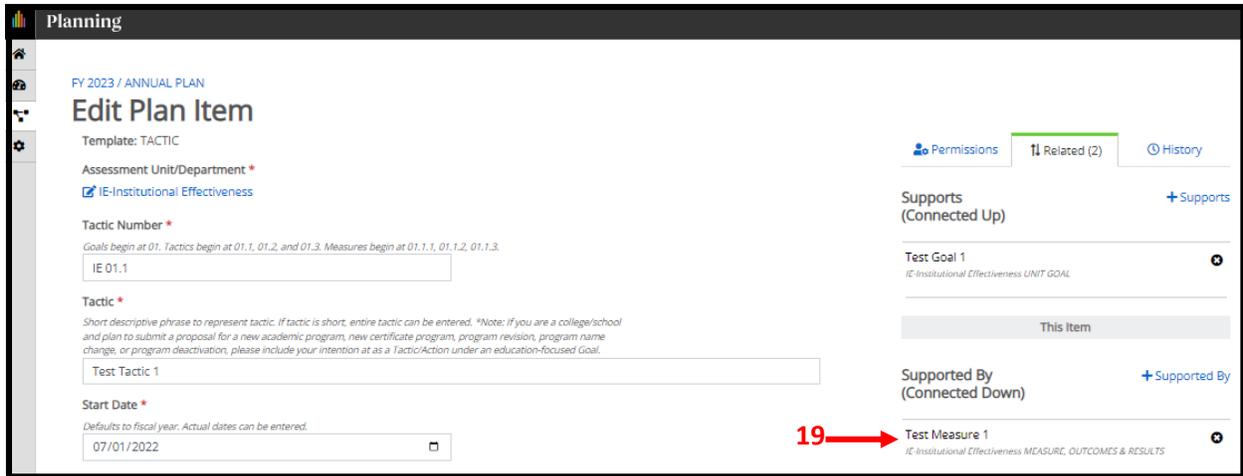
Supported By (Connected Down)

Test Measure 1

IE-Institutional Effectiveness MEASURE, OUTCOMES & RESULTS

[Back to Plan Item](#)

- 19) The alignment now appears on the right side of the screen under the Supported By (Connected Down) section.
- 20) **Finish:** Click **Done**. (There is no “Save” option since the system has an auto-save feature.)



The screenshot displays the 'Edit Plan Item' page in the Planning system. The page is titled 'FY 2023 / ANNUAL PLAN' and 'Edit Plan Item'. The form includes fields for 'Assessment Unit/Department' (IE-Institutional Effectiveness), 'Tactic Number' (IE 01.1), 'Tactic' (Test Tactic 1), and 'Start Date' (07/01/2022). On the right side, there are sections for 'Supports (Connected Up)' and 'Supported By (Connected Down)'. A red arrow labeled '19' points to 'Test Measure 1' in the 'Supported By' section.

You have completed entering the necessary information for the annual unit plan. Progress Levels achieved for all Goals and Measures will be updated through a Mid-Year and Annual Assessment Reports.

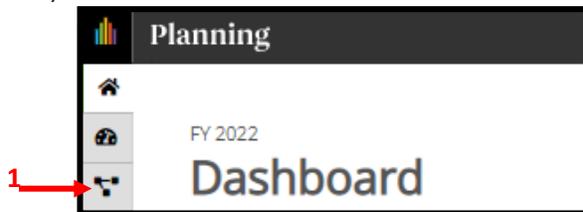
MID-YEAR UPDATE

This section of the user guide will walk you through entering your Mid-Year Update. The Mid-Year Update provides a summary of the results achieved during the first half of the fiscal year. Throughout the year, you are able track all of your Goals, Tactics, and Measures and provide ongoing status updates and results within the Campus Labs Planning Module. Routinely tracking results will help your unit monitor progress while using the achievement of results throughout the year to make the necessary changes to successfully complete your Goals.

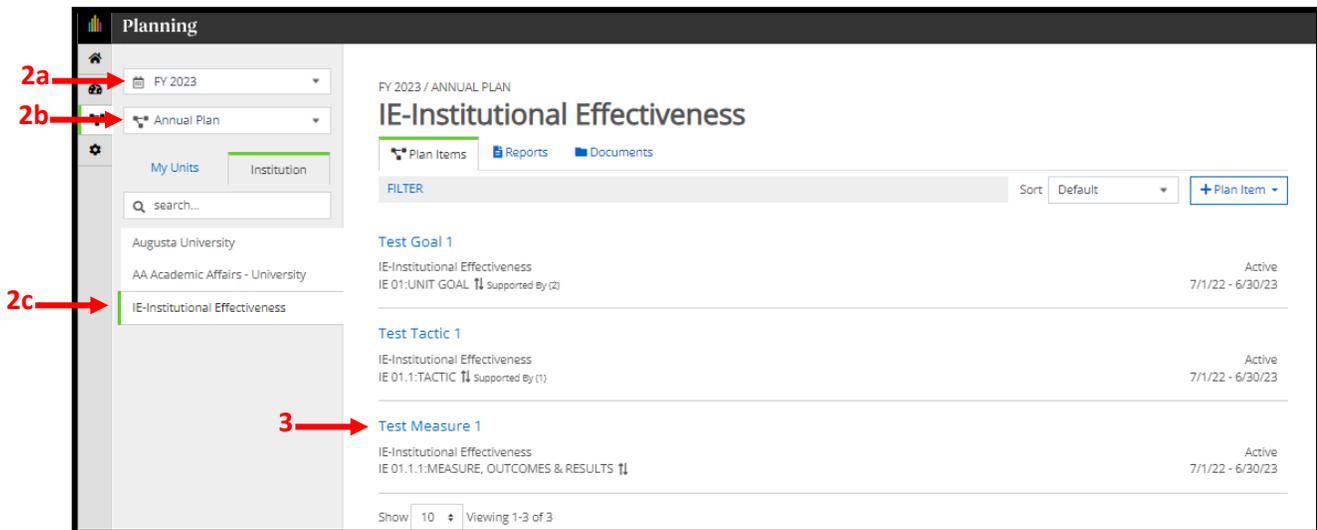
ENTERING MID-YEAR UPDATE – MEASURES

Measure-Level Update:

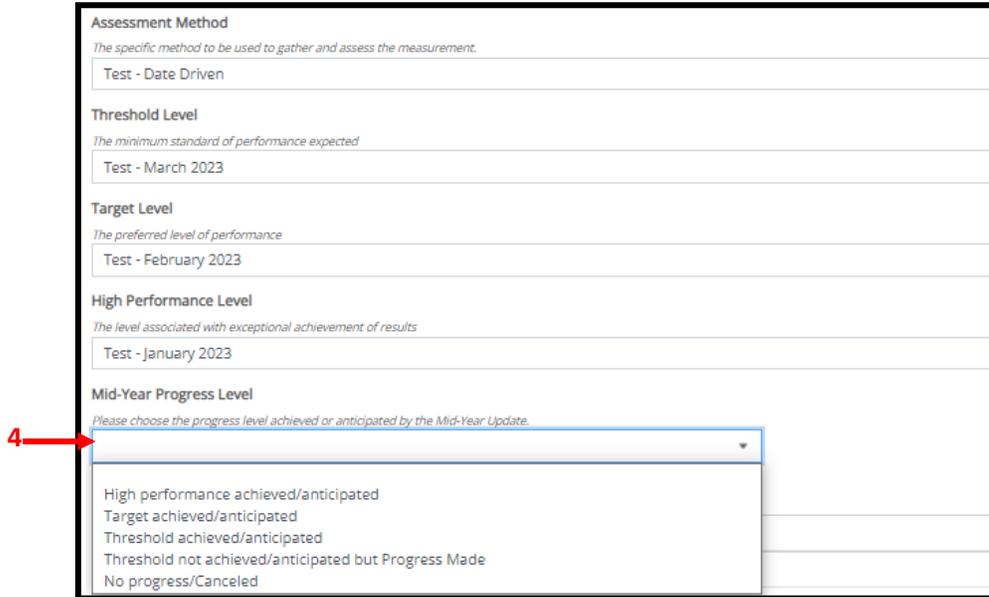
- 1) Click on the **Plans** tab on the left side of the screen.



- 2) a. Select the appropriate **Year**.
 b. Select **Annual Plan**.
 c. Select your **Unit** in the organizational structure on the left.
- 3) Click the **Measure** for which you wish to report progress.



- 4) Scroll down to the Mid-Year section. From the drop-down list, select the **Mid-Year Progress Level** for this Measure: High performance achieved/anticipated, Target achieved/anticipated, Threshold achieved/anticipated, Threshold no achieved/anticipated but Progress Made, and No progress/Canceled.



Assessment Method
The specific method to be used to gather and assess the measurement.
Test - Date Driven

Threshold Level
The minimum standard of performance expected
Test - March 2023

Target Level
The preferred level of performance
Test - February 2023

High Performance Level
The level associated with exceptional achievement of results
Test - January 2023

Mid-Year Progress Level
Please choose the progress level achieved or anticipated by the Mid-Year Update.

- High performance achieved/anticipated
- Target achieved/anticipated
- Threshold achieved/anticipated
- Threshold not achieved/anticipated but Progress Made
- No progress/Canceled

- 5) Complete the **Mid-Year Actual Result(s)** section. Provide a brief narrative of the results actually achieved thus far.



Mid-Year Actual Result(s)
What was the actual result achieved?

File Edit View Insert Format Tools Table

← → Paragraph B I [List Icons]

P

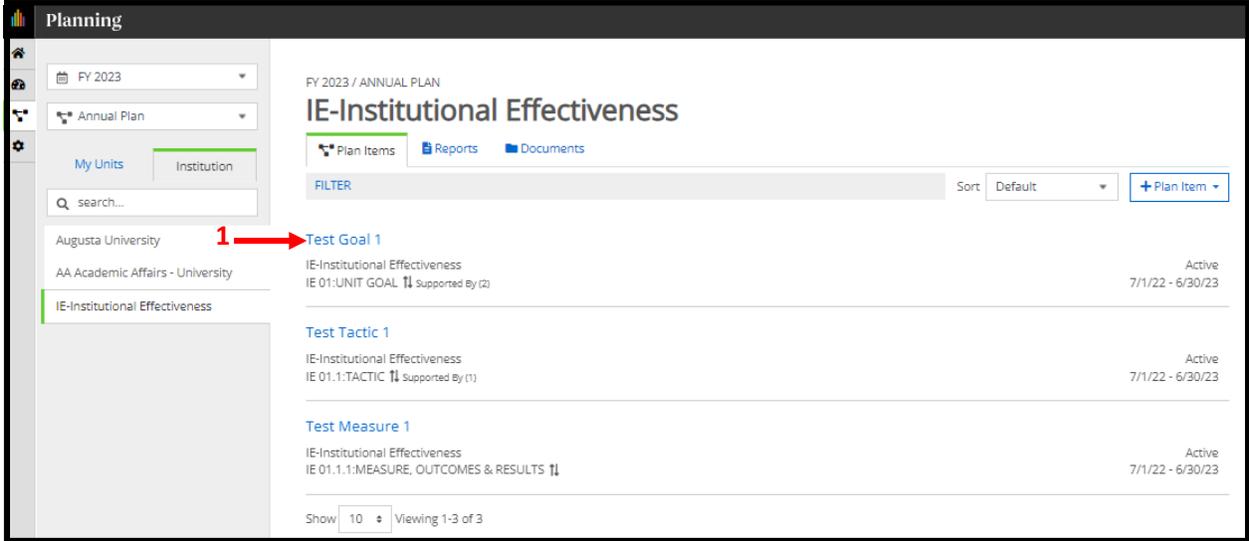
- 6) **Finish:** Click **Done** at the bottom of the screen. (There is no “Save” option since the system has an auto-save feature.)

TIP: Once the results have been submitted for each Measure, these results should be reviewed and used to complete the summary of the Goal they support.

ENTERING MID-YEAR UPDATE – GOALS

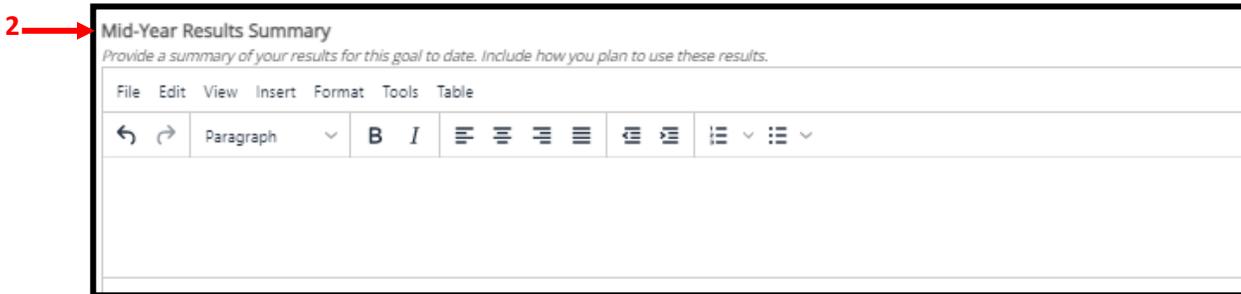
Goal-level update:

- 1) Click on the **Goal** for which you wish to report progress.



The screenshot shows the 'Planning' interface for 'FY 2023 / ANNUAL PLAN'. The main heading is 'IE-Institutional Effectiveness'. On the left sidebar, under 'My Units', 'Institution' is selected, and 'Augusta University' is highlighted with a red arrow and the number '1'. The main content area lists three items: 'Test Goal 1', 'Test Tactic 1', and 'Test Measure 1'. Each item is linked to 'IE-Institutional Effectiveness' and has an 'Active' status with a date range (7/1/22 - 6/30/23). At the bottom, it says 'Showing 10 items. Viewing 1-3 of 3'.

- 2) Scroll down to **Mid-Year Results Summary** and provide a brief narrative of the results actually achieved thus far.



The screenshot shows a text entry field titled 'Mid-Year Results Summary'. A red arrow and the number '2' point to the title. Below the title is a placeholder text: 'Provide a summary of your results for this goal to date. Include how you plan to use these results.' The field has a rich text editor toolbar with options for File, Edit, View, Insert, Format, Tools, and Table. The toolbar includes icons for undo, redo, paragraph style, bold, italic, text alignment, list creation, and link creation.

- 3) **Finish:** Click **Done** at the bottom of the screen. (There is no “Save” option since the system has an auto-save feature.)

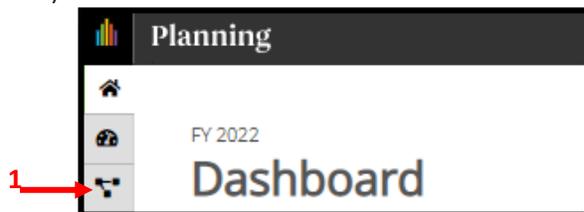
ANNUAL ASSESSMENT RESULTS

Each unit is responsible for identifying annual plans with Goals, Tactics, and Measures to support our vision and our strategic plan, *Creating a Legacy*. At the close of a fiscal year, you will summarize the results for each Goal and Measure in your annual plan. For each Goal, you also will identify what specific actions will be implemented in **support of ongoing planning and resource alignment** efforts. These results also serve as the basis for closing the loop on planning and furthering our efforts in continuous improvement.

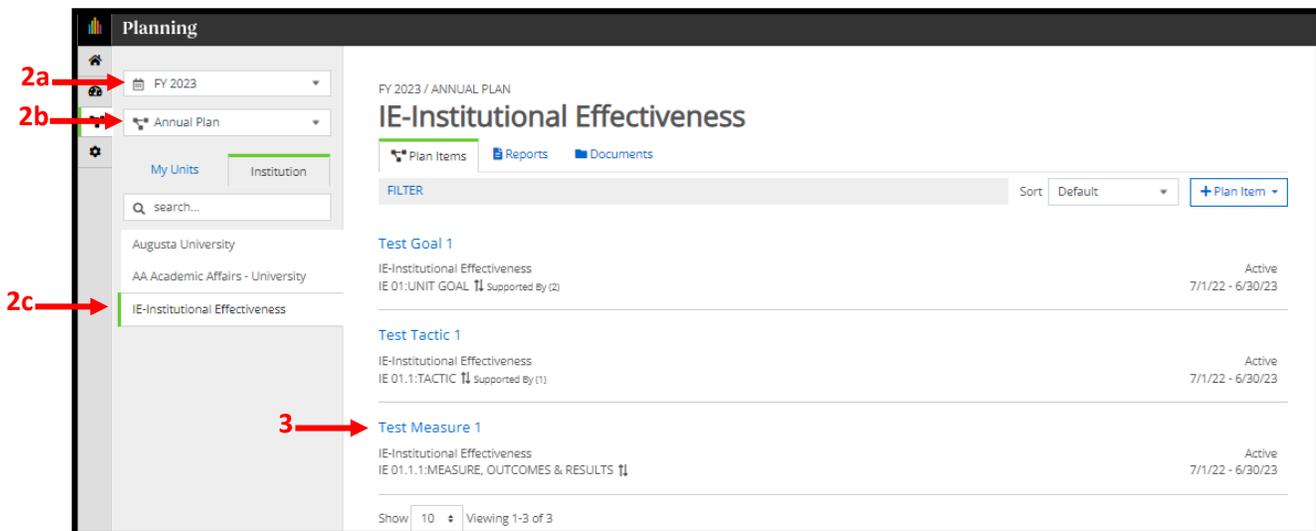
ENTERING ANNUAL RESULTS – MEASURES

Measure-Level Update:

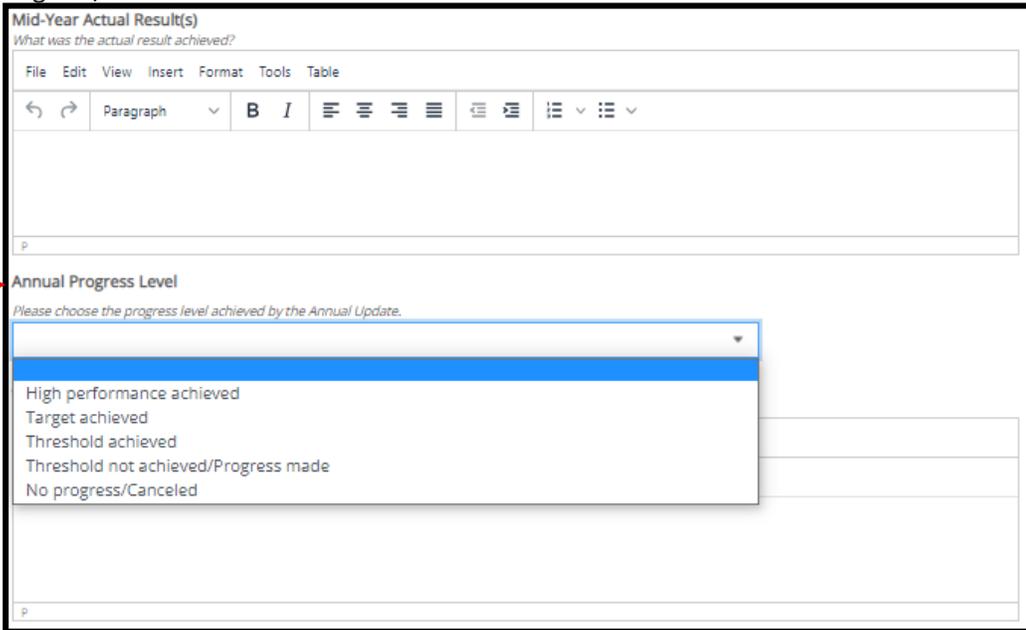
- 1) Click on the **Plans** tab on the left side of the screen.



- 2) a. Select the appropriate **Year**.
 b. Select **Annual Plan**.
 c. Select your **Unit** in the organizational structure on the left.
- 3) Click the **Measure** for which you wish to report progress.



- 4) From the drop-down list, select the **Annual Progress Level** for this Measure: High performance achieved, Target achieved, Threshold achieved, Threshold not achieved/Progress Made, and No progress/Canceled.



Mid-Year Actual Result(s)
What was the actual result achieved?

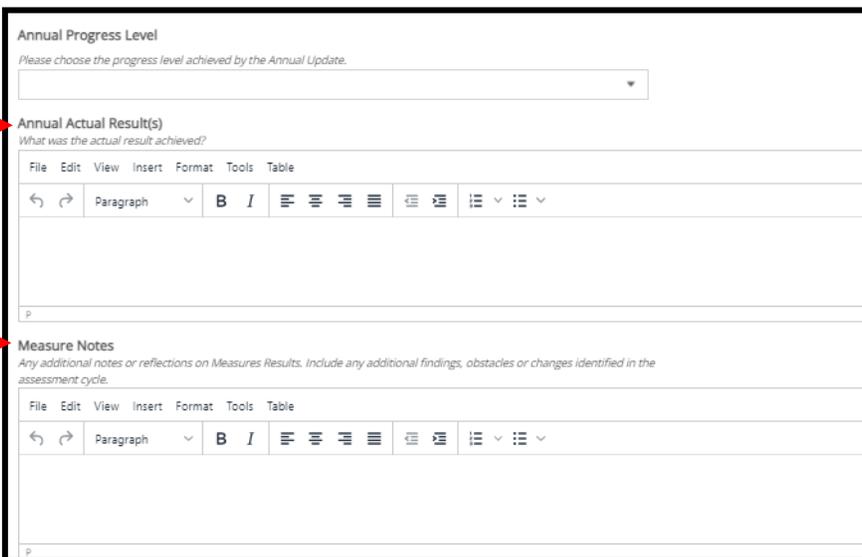
File Edit View Insert Format Tools Table

← → Paragraph **B** *I* [Text Alignment Icons] [List Icons]

Annual Progress Level
Please choose the progress level achieved by the Annual Update.

- High performance achieved
- Target achieved
- Threshold achieved
- Threshold not achieved/Progress made
- No progress/Canceled

- 5) Complete the **Annual Actual Result(s)** section. Provide a brief narrative of the actual results achieved.
- 6) Provide any additional **Measure Notes** (*optional*) to support the Annual Actual Result(s) narrative.



Annual Progress Level
Please choose the progress level achieved by the Annual Update.

Annual Actual Result(s)
What was the actual result achieved?

File Edit View Insert Format Tools Table

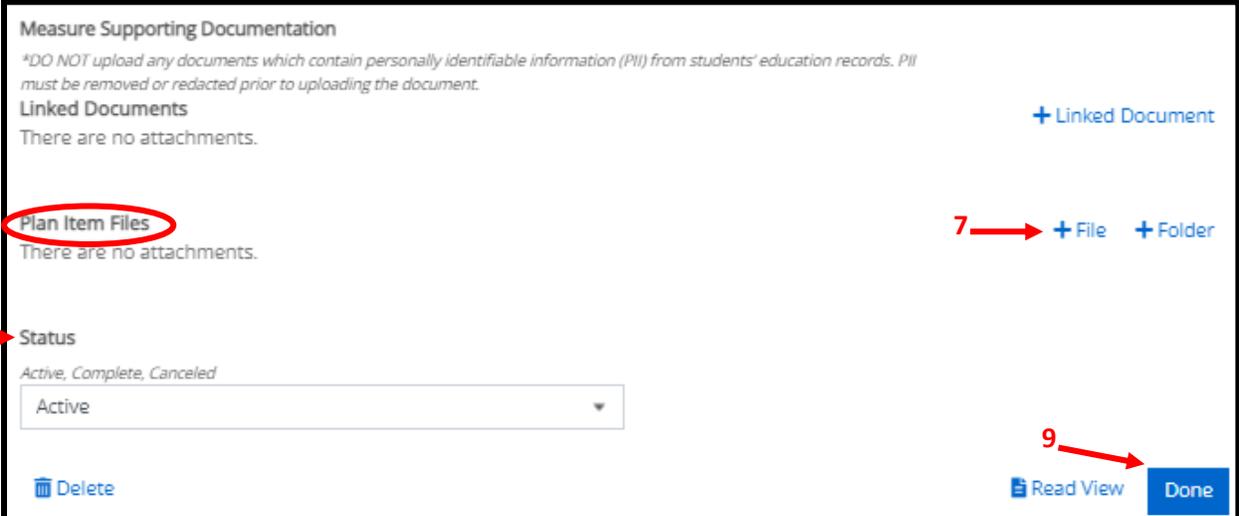
← → Paragraph **B** *I* [Text Alignment Icons] [List Icons]

Measure Notes
Any additional notes or reflections on Measures Results. Include any additional findings, obstacles or changes identified in the assessment cycle.

File Edit View Insert Format Tools Table

← → Paragraph **B** *I* [Text Alignment Icons] [List Icons]

- 7) **Supporting Documentation:** (*Optional*) Under the Plan Item Files section, click on **+ File**. Select the document you wish to upload. Repeat this process until all documents are uploaded.
- 8) **Status:** (*Optional*) Update the **Status** of the Measure from the drop-down list. (Reference the Status legend on page 9 of this user guide.)
- 9) **Finish:** Click **Done**. (There is no “Save” option since the system has an auto-save feature.)



The screenshot shows the 'Measure Supporting Documentation' interface. At the top, there is a warning: **DO NOT upload any documents which contain personally identifiable information (PII) from students' education records. PII must be removed or redacted prior to uploading the document.*

There are two sections for attachments:

- Linked Documents:** Contains the text 'There are no attachments.' and a '+ Linked Document' button.
- Plan Item Files:** This section is circled in red. It contains the text 'There are no attachments.' and two buttons: '+ File' and '+ Folder'. A red arrow labeled '7' points to the '+ File' button.

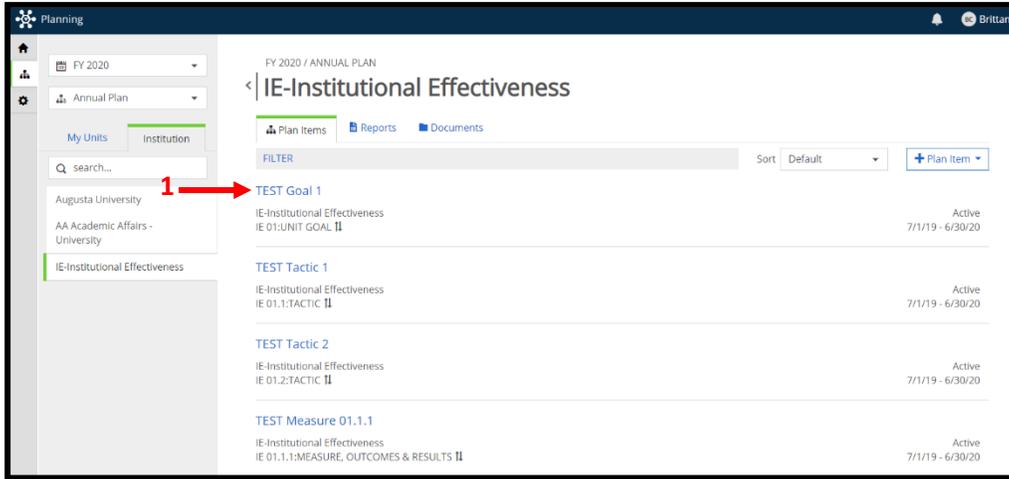
Below these sections is the **Status** section, which is pointed to by a red arrow labeled '8'. It shows a dropdown menu with the text 'Active, Complete, Canceled' and the current selection 'Active'.

At the bottom right, there are two buttons: 'Read View' and 'Done'. A red arrow labeled '9' points to the 'Done' button.

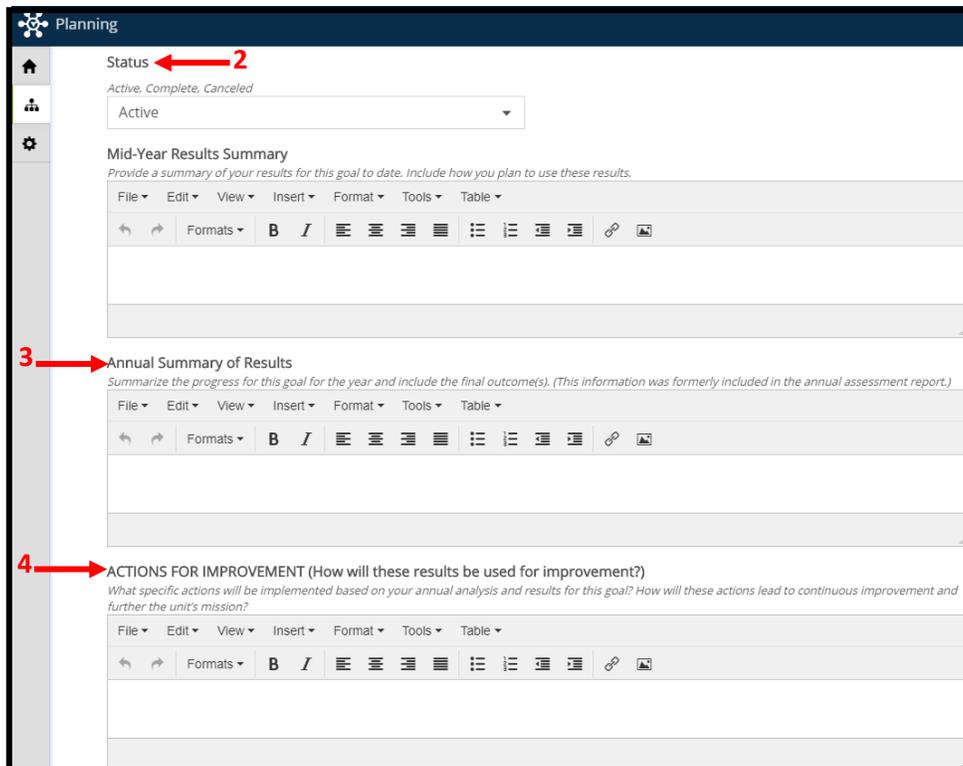
At the bottom left, there is a 'Delete' button with a trash icon.

ENTERING ANNUAL RESULTS – GOALS
Goal-Level Update:

- 1) Click on the **Goal** for which you wish to report progress.



- 2) Update the **Status** of the Goal from the drop-down list (*Optional*). (Reference the Status legend on page 7 of this user guide.)
- 3) In the **Annual Summary of Results** section, provide a brief narrative of the results actually achieved.
- 4) In the **Actions for Improvement** section, provide specific actions to be implemented based on your annual analysis and results for the Goal.



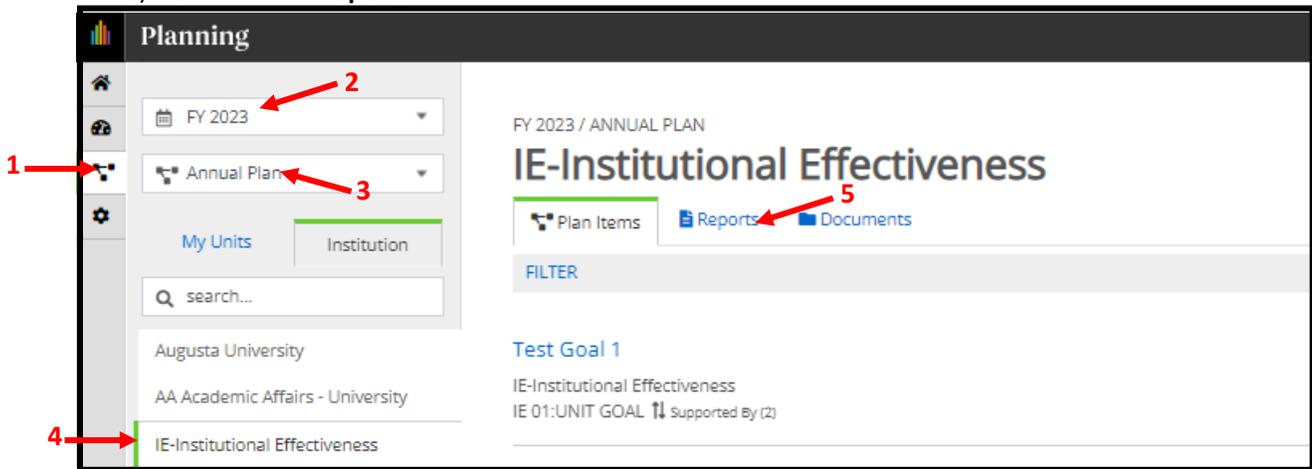
- 5) **Supporting Documentation:** (*Optional*) Under the Plan Item Files section, click on **+ File**. Select the document you wish to upload. Repeat this process until all documents are uploaded.
- 6) **Finish:** Click **Done**. (There is no “Save” option since the system has an auto-save feature.)



RUNNING REPORTS

Once you have entered your unit’s plan, you can generate a report displaying the related Goals, Tactics, and Measures. Once progress information is submitted, the report will include that information also.

- 1) Click on the **Plans** icon.
- 2) Select the appropriate **Fiscal Year** from the drop-down list.
- 3) Select **Annual Plan** from the drop-down list.
- 4) Select the **Unit** from the organizational structure for which you wish to generate a report.
NOTE: If your unit is embedded in another, you will need to click through to locate your unit.
- 5) Click on the **Reports** tab.



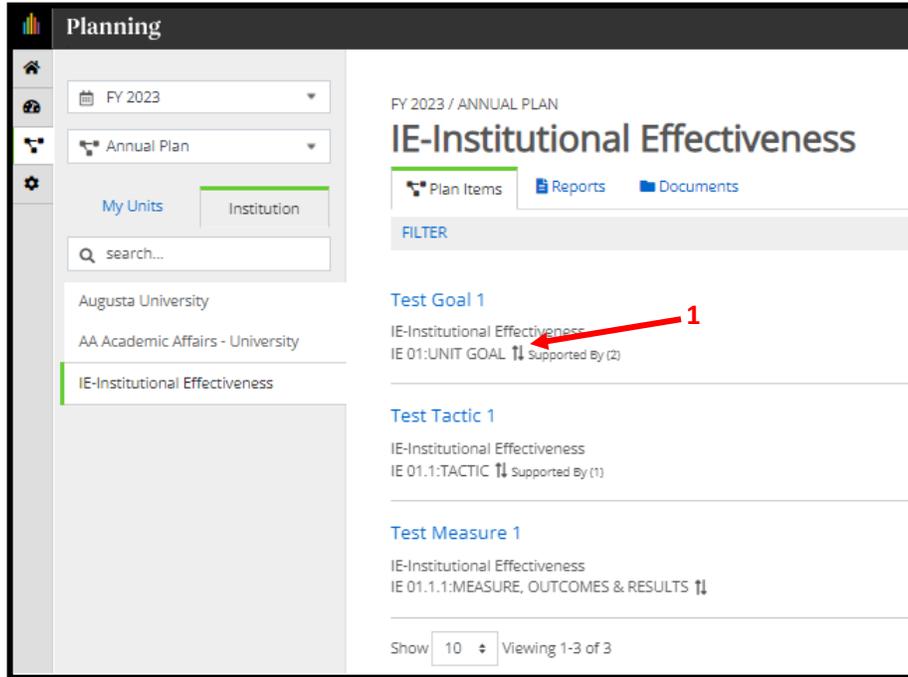
- 6) Scroll through the report options until you locate the “FY__ Unit Plan Mid-Year and Annual Report” you wish to generate. Click **View Report: 7/1/__ – 6/30/__**.
- 7) Reporting options will appear in the drop-down list. To generate a PDF version of the report, click **View Report**. To generate an Excel spreadsheet of the report, click **CSV Report**.

TIP: DO NOT click on the title of the report (Ex: “FY23 Unit Plan Mid-Year and Annual Report”). Clicking on the title enables administrators with report access in Campus Labs to alter the report.

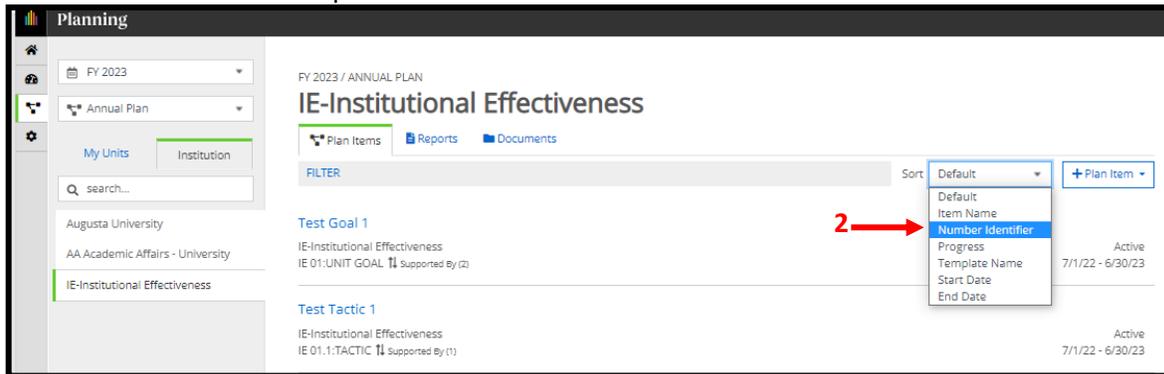


ADDITIONAL TIPS

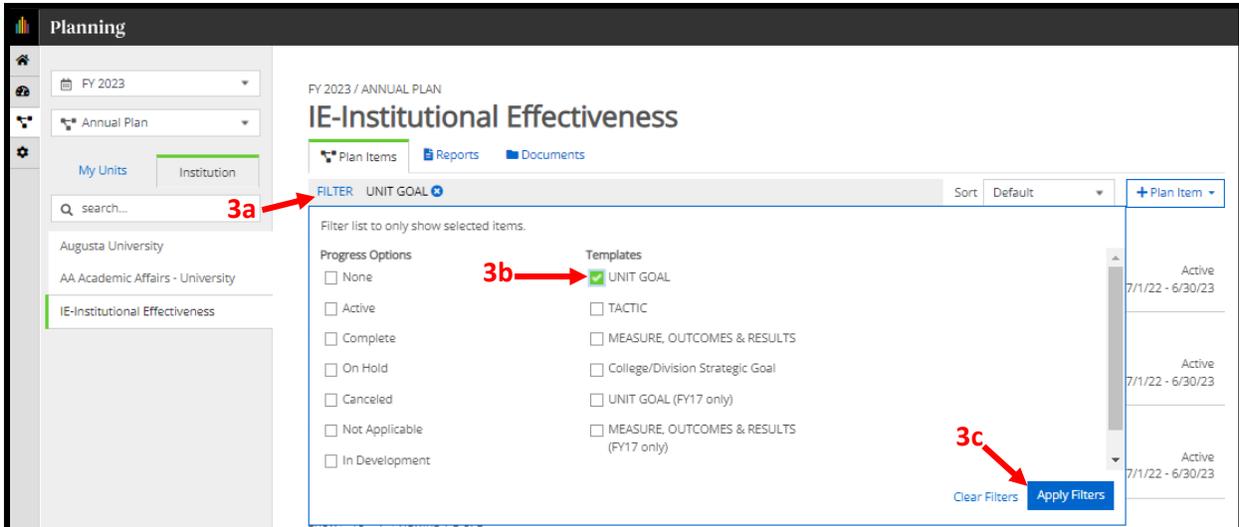
- 1) If a Goal, Tactic, or Measure is related to another item, it will show a  symbol.



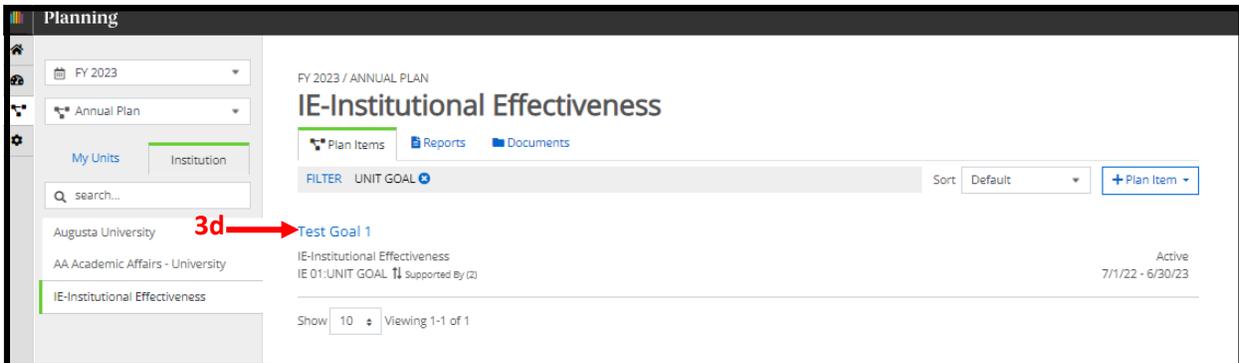
- 2) To sort Goals, Tactics, and Measures as they relate to each other, select **Number Identifier** from the Sort drop-down list.



- 3) a. To filter items, click **Filter**.
- b. Select the item(s) you would like to view.
- c. Click **Apply Filters**.
- d. Only the selected items appear.



The screenshot shows the 'Planning' interface for 'FY 2023 / ANNUAL PLAN' under 'IE-Institutional Effectiveness'. The left sidebar shows a search bar and a list of units, with 'IE-Institutional Effectiveness' selected. The main area has tabs for 'Plan Items', 'Reports', and 'Documents'. A 'FILTER' button is highlighted with a red arrow labeled '3a'. Below it, a filter list is shown with 'UNIT GOAL' selected in the 'Templates' section, also highlighted with a red arrow labeled '3b'. At the bottom right, the 'Apply Filters' button is highlighted with a red arrow labeled '3c'.



The screenshot shows the same 'Planning' interface after filtering. The 'FILTER' button is now disabled. The main area displays a single result: 'Test Goal 1' under 'IE-Institutional Effectiveness'. A red arrow labeled '3d' points from the search bar in the left sidebar to the 'Test Goal 1' result. The result details include 'IE 01:UNIT GOAL' and 'Supported By (2)'. The status is 'Active' with a date range of '7/1/22 - 6/30/23'. At the bottom, it shows 'Showing 10' and 'Viewing 1-1 of 1'.