User Guide

for

FY20 Integrated Planning Tableau Workbook

Division of Institutional Effectiveness

augusta.edu/ie

Fall 2019
## CONTENTS

**ACCESS** ............................................................................................................................................. 3  
**DASHBOARDS** ....................................................................................................................................... 4  
  SUMMARY DASHBOARD ....................................................................................................................... 4  
  BEYOND BOUNDARIES DASHBOARD ................................................................................................. 6  
  KPIs DASHBOARD ............................................................................................................................... 7  
  UNIT PLANS DASHBOARD .................................................................................................................. 8  
  COLLABORATORS DASHBOARD ......................................................................................................... 9  
  ABOUT DASHBOARD .......................................................................................................................... 11
1. Go to https://www.augusta.edu/about/planning/, and click on the workbook link you wish to view. This user guide is catered to the FY20 Integrated Planning Workbook.

2. You will be asked to sign into the AU portal by entering your JagID and password.

**Notes:**
- If you need assistance with your Jag/NetID password or to have it reset, please contact the IT Service Desk at 706-721-4000.
- If you are unable to access the portal, email analytics@augusta.edu.
1. The tabs at the top allow you to view the dashboards.


**SUMMARY DASHBOARD**

The Summary dashboard shows the relationships between the Beyond Boundaries Focus Areas, Goals, and Key Performance Indicators (KPIs) and the Unit Goals, Tactics, and Measures across the University. Filtering allows users to see where a unit’s efforts contribute to specific Beyond Boundaries Focus Areas, Goals, and KPIs and if there is a need to address any gaps.

1. View how Unit Goals align to Beyond Boundaries Goals.
2. View how Unit Tactics align to Beyond Boundaries KPIs.
3. Filter by Planning Leader:
   a. Click the arrow on the drop-down list.
   b. Click the box next to (All) to uncheck all of the boxes.
   c. Click the box(es) next to the desired Planning Leader(s).
   d. Click Apply.

---

**Note:** The filter remains as you explore the other dashboards.
4. Remove any current filter:
   a. Click the arrow on the drop-down list.
   b. Click the box next to (All) to check all of the boxes.
   c. Click Apply.

Note: All filtering actions for the different dashboards can follow the Summary dashboard’s steps 3.a.–3.d. and steps 4.a.–4.c provided above.
BEYOND BOUNDARIES DASHBOARD

The Beyond Boundaries dashboard shows the count of Unit Measures associated with each Beyond Boundaries Goal along with each Measure’s Mid-Year/Annual Progress Level. Filtering allows users to see where a unit’s efforts contribute to specific Beyond Boundaries Goals and if there is a need to address any gaps.

1. View the count of Measures that align to Beyond Boundaries Goals.
2. Filter by Planning Leader. (Reference the Summary dashboard’s steps 3 and 4.)

3. View which Measures align to specific Beyond Boundaries Goals:
   a. Click on one of the Measure bars that corresponds to one of the Beyond Boundaries Goals.
   b. View detailed information on the Measures that align to that Beyond Boundaries Goal.

3a: There are 141 Measures that align to Beyond Boundaries 2.4 Research & Scholarship Goal of Faculty Recruitment & Support as Researchers.

3b: These are the aligned Measures.
The KPIs dashboard shows the count of Unit Measures associated with each Beyond Boundaries KPI along with each Measure’s Mid-Year/Annual Progress Level. Filtering allows users to see where a unit’s efforts contribute to specific Beyond Boundaries KPIs and if there is a need to address any gaps.

1. View the count of Measures that align to Beyond Boundaries KPIs.
2. Filter by Planning Leader. (Reference the Summary dashboard’s steps 3 and 4.)

3. View which Measures align to specific Beyond Boundaries KPIs:
   a. Click on one of the Measure bars that corresponds to one of the Beyond Boundaries KPIs.
   b. View detailed information on the Measures that align to that Beyond Boundaries KPI.
UNIT PLANS DASHBOARD

The Unit Plans dashboard shows the total Unit Measure counts, each Measure’s Mid-Year/Annual Progress Level, and detailed Measure information (e.g., performance levels and notes).

1. Hover over a square, which represents a Measure, to see all relevant planning information.
2. Filter by Planning Leader. (Reference the Summary dashboard’s steps 3 and 4.)

**Note:** For the Beyond Boundaries, KPIs, and Unit Plans dashboards, progress becomes viewable soon after the mid-year and annual progress reporting deadlines, as noted in the screenshot below of the FY19 workbook’s Annual Progress display.
COLLABORATORS DASHBOARD

The Collaborators dashboard shows which collaborators your unit has identified as essential to achieving your Unit Goals. It also shows the other units that have tagged your unit as a vital partner in accomplishing one or more of its Unit Goals so you can identify and pursue those collaboration opportunities proactively.

1. Use the **A. Planning Leader** filter to view the units a Planning Leader has tagged as its collaborators:
   a. Click the arrow on the drop-down list.
   b. Click the box next to (All) to uncheck all of the boxes.
   c. Click the box(es) next to the desired Planning Leader(s).
   d. Click Apply.

   e. Hover over a Unit Goal to see an explanation.

   *In the example shown below, Information Technology plans to collaborate with Ambulatory Care to accomplish its Goal IT4 to “Improve the health of the community and enhance outcomes of patient care through the effective use of technologies, resources, and services.”*

---

**Note:** To remove a current filter, reference the Summary dashboard’s step 4.
2. Use the **B. Tagged Collaborators** filter to view which units have tagged your unit as a collaborator.
   a. Clear any A. Planning Leader filter. (*Reference the Summary dashboard’s step 4.*)
   b. Click the arrow on the drop-down list.
   c. Click the box next to (All) to uncheck all of the boxes.
   d. Click the box(es) next to the desired Planning Leader(s).
   e. Click Apply.

f. Hover over a Unit Goal to see an explanation.
   *In the example shown below, Institutional Effectiveness was tagged as a collaborator by the College of Education. The College of Education plans to collaborate with Institutional Effectiveness to accomplish its Goal COE03 to “Engage in program evaluation to assess the effectiveness of program delivery and to prepare for re-accreditation.”*
ABOUT DASHBOARD

The About dashboard provides an overview of the Integrated Planning workbook, including its overall purpose and when the data was last published.

1. View information about the workbook (e.g., purpose and date of recent data update).
3. Access related workbooks.

About Annual Unit Plan Progress FY20

PURPOSE
The purpose of this workbook is to visualize the alignment of Annual Unit Plans with the Strategic Plan, Beyond Boundaries. Information presented includes details of each Unit Plan, progress made, and internal collaborators.

USERS
AU Faculty and Staff

DATA AS OF
October 21, 2019

NOTES + METHODOLOGY
The Division of Institutional Effectiveness collects Annual Unit Plans (which consists of Unit Goals, Tactics, and Measures) across the institution. Planning Leaders submit their Goals, Tactics, and Measures for the upcoming fiscal year in the Campus Labs Planning Module every June 15. The Mid-Year Planning Update is due January 15, and the Annual Assessment Report is due July 31. Reports are exported from Campus Labs five times during each planning cycle to correspond with these deadlines and to provide two additional updates to the workbook.

Data Steward: Division of Institutional Effectiveness
Sponsor/Trustee: Provost
Prepared by: Division of Institutional Effectiveness

Related Links
- About Planning
- Strategic Planning
- Annual Unit Planning: Resources/Tools
- Annual Unit Planning: Resource Alignment

Related Workbooks
- Annual Unit Plan Progress FY19