

# Anthology/Campus Labs Planning Module User Guide

for

Unit Planning

**Division of Institutional Effectiveness** 

augusta.edu/ie Spring 2022



## **CONTENTS**

BASIC LOGIN/LOGOUT INFORMATION.	
INPUTTING ANNUAL PLANS	6
ENTERING UNIT/DEPARTMENT GOALS	7
ENTERING TACTICS	10
ENTERING MEASURES	
RELATING ITEMS	
RELATING GOALS	15
RELATING TACTICS	20
MID-YEAR UPDATE	
ENTERING MID-YEAR UPDATE – MEASURES	23
ENTERING MID-YEAR UPDATE – GOALS	25
ANNUAL ASSESSMENT RESULTS	
ENTERING ANNUAL RESULTS – MEASURES	26
ENTERING ANNUAL RESULTS – GOALS	29
RUNNING REPORTS	
ADDITIONAL TIPS	

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

### AUGUSTA UNIVERSITY

## **BASIC LOGIN/LOGOUT INFORMATION**

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

Sign in with your JagID. If you have an issue signing in, please contact the service desk at 706-721-4000.
Usename Password
Sign in This system is the property of Augusta University or orne its cooperative organizations. The system is restricted to authorized users only. The information on this system is also the property of Augusta University or one of its cooperative organizations. Unless applicable laws. contracts or policies indicate oprivacy in any data. format. or other kind of information or communications transmitted. received, printed. stored. or recorded on any of our systems unless applicable laws indicate otherwise. Augusta University reserves the right to monitor usage of this system. You consent to such monitoring by authenticating. By authenticating you also agree to abide by the Augusta University use policy located at http://www.augusta.edu/compliance/policyinfo/policie s.php.

**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:

са		DGY
	Augusta University	
Compliance Assist Connect and manage your program review and accreditation efforts	Course Evaluations Elevate teaching and learning with meaningful data	Faculty Manage course rosters, course evaluations, and more with a personalized dashboard
	Planning Connect and manage your strategic planning efforts	<b>—</b> 3
Need Help? Vie	sit our Support Center for articles, webinars, ar	nd other resources!
	©2022 Campus Labs	



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.

	Planning	
*		
Ð	FY 2022	
<b>.</b>	Dashboard	
٠	Assessment Cycles	Announcements
	O There are no Assessment Cycles active at this time. Create a new Assessment Cycle to monitor institutional progress on a dynamic site administrator dashboard.	Attention Please be advised that no personally identifiable
		information specifically pertaining to student information (including names, assignment grades or sco <u>More</u>
	My Plan Items	Welcome and Overview 4 The Division of Institutional Effectiveness provides support
	FILTER Sort Vefault *	and leadership for the university and health system in the application of planning, assessment, data <u>More</u>

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

di	Planning
*	DASHBOARD
æ	Announcement
Δ.	Welcome and Overview
٥	The Division of Institutional Effectiveness provides support and leadership for the university and health system in the application of planning, assessment, data analysis and reporting, performance monitoring and improvement, and project and change management. The practical and collaborative services drive overall organizational improvements in quality, responsiveness, and efficiency for internal and external stakeholders by facilitating:
	<ul> <li>Data driven decision-making</li> <li>Alignment of strategic and operational goals</li> <li>Recognition of opportunities for process and continuous improvement</li> <li>Effective implementation of programs and initiatives to support teaching, discovery, clinical care, and service</li> </ul>
	The Anthology/Campus Labs Planning Module stores Integrated Planning and Student Learning Outcome (SLO) Assessment information. Please see the links and resources below.
	Integrated Planning Process
5	Augusta University engages in ongoing, integrated, and institution-wide research-based planning, budgeting, and evaluation processes that (1) incorporate a systematic review of the Augusta University mission, goals, and outcomes; (2) result in continuing improvement in institutional quality; and (3) demonstrate the institution is effectively accomplishing its mission. Its integrated planning process integrates a strategic planning framework that connects and aligns its planning and resourcing discussions at all levels of the organization. The <i>Beyond Boundaries</i> strategic plan aligns to the University System of Georgia's Strategic Plan 2024. Read more about the plans, the <i>Beyond Boundaries</i> Progress Report, and IE's support below:
	1. University System of Georgia's <i>Strategic Plan 2024</i> 2. Augusta University's Strategic Plan <i>Creating a Legacy</i> 3. Institutional Effectiveness Integrated Planning webpage
	Major Administrative Divisions submit Goals, Tactics, and Measures each fiscal year as a part of the integrated planning process. Unit Plans are aligned to Augusta University's strategic plan and provide a framework upon which Divisions share their achievements and challenges at the annual Planning and Resource Alignment Hearings. To read more about the integrated planning process and to view the corresponding Integrated Planning Tableau Workbooks, please visit the Planning webpage.
	Announcement Files + File + Folder
	Planning - Anthology/Campus Labs Planning Module User Guide CReplace CRename



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.

<b>ull</b> i	Planning	🧳 📧 Brittany
* •	DASHBOARD Announcement Welcome and Overview	BC Brittany Cipolione Augusta University
	The Division of Institutional Effectiveness provides support and leadership for the university and health system in the application of planning, assessment, data analysis and reporting, performance monitoring and improvement, and project and change management. The practical and collaborative services drive overall	Support Sign Out



### **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.

1	<b>i</b>	Planning	2	🖻 Brittany
	*			
	æ	FY 2022		
1	5	Dashboard		

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

	ıllı	Planning	
2	<b>е</b>	▶ 🛗 FY 2023 💌	FY 2023 / ANNUAL PLAN
3	÷	🛉 🖬 Annual Plan	INST-Instruction
	٠	My Units Institution	Plan Items Reports Documents
		O search	FILTER
		Q Search	
		Augusta University	There are no plan items associated with the current Time Period, Plan, and Organizational Unit.
		AA Academic Affairs - University	Show 10 + Viewing 0-0 of 0
4.	T	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.

	Planning		
*			
æ	🛗 FY 2023 💌	FY 2023 / ANNUAL PLAN	
Υ.	😭 Annual Plan 🔹	INST-Instruction	12
۵	My Units Institution	Plan Items Reports Documents 1b	
	Q search	HLIEK	Sort Default • + Plan Item •
		There are no plan items associated with the surgest Time Period. Plan, and Organizational Unit	UNIT GOAL
	Augusta University	There are no plan terns associated with the content time rendo, rian, and organizational onit.	TACTIC
	AA Academic Affairs - University	Show 10 A Viewing 0.0 of 0	MEASURE, OUTCOMES & RESULTS
	INST-Instruction		College/Division Strategic Goal UNIT GOAL (FY17 only)

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.

<b>d</b> t	Planning
*	
æ	FY 2023 / ANNUAL PLAN
<b>*</b> *	Edit Plan Item
•	Template: UNIT GOAL
	Assessment Unit *
	C IE-Institutional Effectiveness
	Unit/Department Goal Number *
2	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
3	
	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 deachviston, plases include your intention at as a Tactic/Action under an education-focused Goal.
4	Test Goal 1
	Description of Goal Brief description of the goal, if needed.
5	File Edit View Insert Format Tools Table
	か c <sup>&gt;</sup> Paragraph v B I 三 三 三 三 二 二 二 二 二 二
	۶ Start Date *
	Defaults to the fiscal year. Actual dates can be entered.
	07/01/2022
	End Date *
	Defaults to the fiscal year. Actual dates can be entered.
	06/30/2023

- 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.

	Responsible Person
-	Leader responsible for this unit.
	Q Start typing a user's name
	No users have been added as recipients.
	Show 10 • Viewing 1-1 of 1
	FY23 Institutional Collaborators
8	Select the Augusta University colleges/schools and units with which you plan to collaborate to achieve this PV23 goal.  Ambulatory Care
	Audit, Compliance, Ethics, and Risk Management
	Auxiliary Services



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.)

Active, Complete, Canceled	
Active	
Complete	
On Hold	
Canceled	
Not Applicable	
In Development	

#### 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 <u>Plan Item Files</u> 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.

ıllı –	Planning		
*			
æ	🛱 FY 2023 💌	FY 2023 / ANNUAL PLAN	
Υ.	🚏 Annual Plan 👻	IE-Institutional Effectiveness	
۵	My Units Institution	Teports Documents	
		FILTER	
	Q search		
	Augusta University 12	Test Goal 1	
	AA Academic Affairs - University	IE-Institutional Effectiveness IE 01:UNIT GOAL	
	IE-Institutional Effectiveness		



#### **ENTERING TACTICS**

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

dh.	Planning		
*			
Ð		FY 2023 / ANNUAL PLAN	
Υ.	🗣 Annual Plan 🔹	IE-Institutional Effectiveness	1a 🚬
٠	My Units Institution	Teports Documents	
		FILTER	Sort Default 💌 🕂 Plan Item 🗸
	Q search	10,	UNIT GOAL
	Augusta University	Test Goal 1	ТАСТІС
	AA Academic Affairs - University	IE-Institutional Effectiveness	MEASURE, OUTCOMES & RESULTS
	IE-Institutional Effectiveness		College/Division Strategic Goal UNIT GOAL (FY17 only)

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.)

P	lanning
	Template: TACTIC
	Assessment Unit/Department *
	C IE-Institutional Effectiveness
	Tactic Number *
	Goals begin at 01. Tactics begin at 01.1, 01.2, and 01.3. Measures begin at 01.1.1, 01.1.2, 01.1.3.
-	IE 01.1
	Tactic *
	Short descriptive phrase to represent tactic. If tactic is short, entire tactic 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 Tactic 1
	Start Date *
	Defaults to fiscal year. Actual dates can be entered.
	07/01/2022
<	End Date *
	Defaults to fiscal year. Actual dates can be entered.
	06/30/2023
	Status
-	→
	Fiscal Resources: One-Time
	List cost of one-time expenses as noted in the planning and resource alignment sessions.
	\$ 0.00
	Fiscal Resources: Recurring
Þ	List cost of recurring expenses as noted in the planning and resource alignment sessions.
	\$ 0.00
	Fiscal Notes



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.

<b>i</b> h	Planning		
*			
æ	₩ FY 2023 💌	FY 2023 / ANNUAL PLAN	
۳.	Annual Plan	IE-Institutional Effectiveness	1a
٠	My Units Institution	Plan Items Reports Documents	
	O search	FILTER	Sort Default 🔹 🕂 Plan Item 🔹
	Q Search	1h	UNIT GOAL
	Augusta University Test Goal 1		TACTIC
	AA Academic Affairs - University	IE-Institutional Effectiveness	MEASURE, OUTCOMES & RESULTS
	IE-Institutional Effectiveness		College/Division Strategic Goal UNIT GOAL (FY17 only)

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

 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.

dh.	Planning
*	
æ	FY 2023 / ANNUAL PLAN
ς.	Edit Plan Item
٠	Template: MEASURE, OUTCOMES & RESULTS
	Assessment Unit/Department *
	🕼 IE-Institutional Effectiveness
	Measure Number *
	Goals begin at 01.0. Tactics begin at 01.1, 01.2, and 01.3. Measures begin at 01.1.1, 01.1.2, and 01.1.3.
2	IE 01.1.1
	Measure *
	Short descriptive phrase to represent the measure. If the measure is short, the entire measure can be entered.
3.	Test Measure 1
	Start Date *
	Defaults to fiscal year. Actual dates can be entered.
	07/01/2022
4	End Date *
	Defaults to fiscal year. Actual dates can be entered.
	06/30/2023



- 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.

-ğ-	Planning
<b>†5</b>	Assessment Method
÷	The specific method to be used to gather and assess the measurement.
* <mark>6</mark>	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

- Supporting Documentation: (Optional) Scroll to the bottom to the <u>Plan Item Files</u> 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	
<sup>4</sup> DO NOT upload any documents which contain personally identifiable information (PII) from must be removed or redacted prior to uploading the document. Linked Documents	students' education records. Pll + Linked Document
Inere are no attachments.	
Plan Item Files	9 + File + Folder
There are no attachments.	
Status ┥ 10	
Active, Complete, Canceled	11
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.

ŵ	Planning		
*			
Ð	₩ FY 2023 ▼	FY 2023 / ANNUAL PLAN	
Υ.	😭 Annual Plan 👻	IE-Institutional Effectiveness	
٠	My Units Institution	Plan Items Reports Documents	
	Q search	FILTER	
	Augusta University	Test Goal 1	
	AA Academic Affairs - University	IE-Institutional Effectiveness IE 01:UNIT GOAL	
	IE-Institutional Effectiveness		
		Test Tactic 1	
		IE-Institutional Effectiveness	
		IE 01.1:TACTIC	
	12	Test Measure 1	
		IE-Institutional Effectiveness IE 01.1.1:MEASURE, OUTCOMES & RESULTS	
		Show 10 + Viewing 1-3 of 3	



### **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.

			REL	.A1	FING GOALS
1)	Click on your fi	st G	Goal.		
		ı	Planning		
		*			
		æ	🛱 FY 2023 💌		FY 2023 / ANNUAL PLAN
		Υ.	🗣 Annual Plan 🔹		IE-Institutional Effectiveness
		٠	My Units Institution		Plan Items Reports Documents
			indication		FILTER
			Q search		
			Augusta University	•	Test Goal 1
			AA Academic Affairs - University		IE-Institutional Effectiveness IE 01:UNIT GOAL
			IE-Institutional Effectiveness		
					Test Tactic 1
					IE-Institutional Effectiveness
					IE 01.1:TACTIC

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

	Planning	
*		
Ð	FY 2023 / ANNUAL PLAN	2.
Υ.	Edit Plan Item	
٠	Template: UNIT GOAL	Lo Permissions 11 Related (1) History
	Assessment Unit *	
	C IE-Institutional Effectiveness	Assign Responsible Users
	Unit/Department Goal Number *	Recoonsible Lisers
	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	No responsible users nave been adoed.

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





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**.

<b>  </b>   I	Planning		
≈ 29	TEST GOAL 1 Select a Supports (Re	elated UP) Item	
•	➡ FY 2023 •	FILTER There are no items available to relate.	Supports (Connected Up)
	Annual Plan	Show 10 + Viewing 0.0 of 0	No Connections have been added.
	Augusta University 4		Supported By
	AA Academic Affairs - University		(Connected Down)
	Risk Management ATH-Intercollegiate Athletics		Back to Plan Item

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

	Planning	
*		
Ð	TEST GOAL 1	
Υ.	Select a Supports (Related UP) Item	
٠	FILTER	Supports
	FY 2023     There are no items available to relate.	(Connected Up)
	St Annual Plan	No Connections have been added.
	Annual Plan Student Learning Outcomes Show 10 + Viewing 0-0 of 0	This Item
	Creating a Legacy 5	
	Transition Forward	Supported By (Connected Down)
	Nission Pian Health System SACSCOC	No Connections have been added.

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.

	<u> </u>	<u> </u>	, 0	,
Planning				
TEST GOAL 1				
Select a Suppo	rts (Re	lated UP) Item		
		FILTER		Supports
🛗 FY 2023	Ψ.		_	(Connected Up)
Treating a Legacy	•	Forward-Looking Education Augusta University	Active	No Connections have been added.
Q search		1.1 Learning:Distinguishing Objective	4/27/22 - 6/30/27	This Item
Augusta University		Impactful Learning Experiences	+	6 Supported By
AA Academic Affairs - Universit	у	Augusta University 1.2 Learning:Distinguishing Objective	Active 4/27/22 - 6/30/27	(Connected Down)
ACERM-Audit, Compliance, Ethi Bick Management	ics, and			No Connections have been added.
Nak Management		Inclusive Instructional Culture	+	
ATH-Intercollegiate Athletics		Augusta University	Active	<ul> <li>Back to Plan Item</li> </ul>
EXR-External Relations		1.3 Learning:Distinguishing Objective	4/27/22 - 6/30/27	

**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 **t** 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.

	FILTER		Supports
🖶 FY 2023 🔹	Forward Looking Education		(Connected Up) 8
Y Creating a Legacy	Augusta University	Active	Forward-Looking Education
Q search	1.1 Learning:Distinguishing Objective	4/2//22 - 6/30/27	
Augusta University	Impactful Learning Experiences	+	Inclusive Instructional Culture Augusta University Distinguishing Objective
AA Academic Affairs - University	Augusta University 1.2 Learning:Distinguishing Objective	Active 4/27/22 - 6/30/27	Interelies in the set Callaboration
ACERM-Audit, Compliance, Ethics, and Risk Management	Inclusive Instructional Culture		Discovery Augusta University Distinguishing Objective
ATH-Intercollegiate Athletics	Augusta University	Active	
	1.3 Learning:Distinguishing Objective	4/27/22 - 6/30/27	This Item
EXR-External Relations			
EXR-External Relations	Interdisciplinary and Collaborative Discovery	~	Supported By

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	
*		
æ	FY 2023 / ANNUAL PLAN	
<b>.</b>	Edit Plan Item	
•	Template: UNIT GOAL	Parmissions 1 Palmod (2) (0 History
	Assessment Unit *	
	☑ IE-Institutional Effectiveness	Supports + Supports
	Unit/Department Goal Number *	10 (Connected Up)
	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	Envard-Looking Education
	IE 01	Augusta University Distinguishing Objective
	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 newision, program name change, or program descriation, plase include your internion at as a lacitaticAtion under an educatorio-focuse Goal.	Inclusive Instructional Culture Augusta University Distinguishing Objective
	Test Goal 1	Interdisciplinany and Collaborative Discovery
	Description of Goal Brief description of the goal, if needed.	Augusta University Disting University Disting Objective
	File Edit View Insert Format Tools Table	This Item
	$\bigcirc$ $\bigcirc$ Paragraph $\checkmark$ B I = = = = = $\bigcirc$ $\boxdot$ $\blacksquare$ $\blacksquare$ $\lor$	
		Supported By (Connected Down)
		No Connections have been added.

17



- 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.
   <u>NOTE</u>: 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.

Image: Pri 2023       Test Tactic 1       14       Image: Pri 2023       Image: Pri 2023				FILTER		
Annual Plan     12     IE-Institutional Effectiveness     17/1/22 - 6/30/23     Forward-Looking Education       Augusta University     IE-Institutional Effectiveness     7/1/22 - 6/30/23     Inclusive Instructional Culture       Augusta University     Show     10     Viewing 1-1 of 1     Augusta University       IE-Institutional Effectiveness     13     Interdisciplinary and Collaboral Discovery		(Connected Up)	14 .	Test Tactic 1	•	🛗 FY 2023
Q search     IE 01.1:TACTIC     7/1/22 - 6/30/23     Augusta University Distinguishing Objection       Augusta University     Show     10 •     Viewing 1-1 of 1     Augusta University Distinguishing Objection       AA Academic Affairs - University     Ite-Institutional Effectiveness     13     Interdisciplinary and Collaborar		Forward-Looking Education	±	IE-Institutional Effectiveness	<b>←</b> 12 ·	🚏 Annual Plan 🔶
Augusta University     Show     10     Viewing 1-1 of 1     Augusta University       AA Academic Affairs - University     Interdisciplinary and Collabora       IE-Institutional Effectiveness     13	we	Augusta University Ustilliguishing Objective	7/1/22 - 6/30/23	IE 01.1:TACTIC		Q search
AA Academic Affairs - University IE-Institutional Effectiveness I3 Interdisciplinary and Collaboral Discovery	ive	Inclusive Instructional Culture Augusta University Distinguishing Objective		Show 10 + Viewing 1-1 of 1	ity	Augusta University
IE-Institutional Effectiveness - 13 Interdisciplinary and Collaborat Discovery					airs - University	AA Academic Affairs - Uni
	tive	Interdisciplinary and Collaborative Discovery		.3	ffectiveness 🚽 🔤 1	IE-Institutional Effectiven
Augusta University Distinguishing Objecti	ive	Augusta University Distinguishing Objective				
This Item		This Item				
Supported By		Supported By				

- 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.

di.	Planning			
* 63	TEST GOAL 1			
ς. α	Select a Supports (Re			Supports
-	🛗 FY 2023 💌	Test Tactic 1	~	(Connected Up)
	C search	IE-Institutional Effectiveness IE 01.1:TACTIC	7/1/22 - 6//0/23	Forward-Looking Education Augusta University Distinguishing Objective
	Augusta University AA Academic Affairs - University	Show 10 + Viewing 1-1 of 1		Inclusive Instructional Culture  Augusta University Distinguishing Objective
	IE-Institutional Effectiveness		15	Interdisciplinary and Collaborative Discovery Augusta University Distinguishing Objective
				This Item
				Supported By (Connected Down) 16
				Test Tactic 1 IE-Institutional Effectiveness TACTIC
				17 KBack to Plan Item



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

Planning	
FY 2023 / ANNUAL PLAN	
- Edit Plan Item	
Template: UNIT GOAL	Permissions
Assessment Unit *	
C IE-Institutional Effectiveness	Supports + Supports
Unit/Department Goal Number *	(Connected Up)
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	Februard Looking Education
IE 01	Augusta University Distinguishing Objective
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 deschutedor, please include your intention at as a Tactic/Acino under an education-focused Goal.	Inclusive Instructional Culture Augusta University Distriguishing Objective
Test Goal 1	Interdisciplinary and Collaborative Discovery
Description of Goal Brief description of the goal, if needed.	Augusta University Distinguishing Objective
File Edit View Insert Format Tools Table	This Item
ら (*) Paragraph v B I 三三三三 三 三 三 三 ン 三 v	
	Supported By + Supported By (Connected Down)
	18 Test Tactic 1
P	IE-Institutional Effectiveness TACTIC
Start Date *	
Defaults to the fiscal year. Actual dates can be entered.	
0//01/2022	

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



#### 1) Click on your first Tactic. 📕 Planning ➡ FY 2023 Ŧ FY 2023 / ANNUAL PLAN Ð **IE-Institutional Effectiveness** ÷. Annual Plan \* Plan Items ٠ My Units Institution FILTER Q search. Augusta University Test Goal 1 IE-Institutional Effectiveness AA Academic Affairs - University IE 01:UNIT GOAL 1 Supported By (1) IE-Institutional Effectiveness 1 Test Tactic 1 IE-Institutional Effectiveness IE 01.1:TACTIC Test Measure 1 IE-Institutional Effectiveness IE 01.1.1:MEASURE, OUTCOMES & RESULTS Show 10 ¢ Viewing 1-3 of 3

**RELATING TACTICS** 

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

dh	Planning	
*		
æ ∵	FY 2023 / ANNUAL PLAN Edit Plan Item	2
۵	Template: TACTIC	a Permissions 1 Related (1) 🕚 History
	Assessment Unit/Department *	

- 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

anning				
FY 2023 / ANNUAL PLAN				
Edit Plan Item				
Template: TACTIC				
Assessment Unit/Department *		Zo Per	missions TI Related (1)	() History
C IE-Institutional Effectiveness		Suppor	ts	+ Supports
Tactic Number *		(Conne	cted Up)	1 Supports
Goals begin at 01. Tactics begin at 01.1, 01.2, and 01.3. Measures I	begin at 01.1.1, 01.1.2, 01.1.3.	<b>a</b> . —		
IE 01.1		Test Goal IE-Institution	II 1 onal Effectiveness UNIT GOAL	0
Tactic *				
Short descriptive phrase to represent tactic. If tactic is short, entin and plan to submit a proposal for a new academic program, new change, or program deactivation, please include your intention at	e tactic can be entered. "Note: If you are a collega/school rettificate program, program revision, program name as a Tactic/Action under an education-focused Goal.		This Item	
Test Tactic 1		Suppor	ted By 4	+ Supported By
Start Date *		(Conne	cted Down)	
Defaults to fiscal year. Actual dates can be entered.		No Conn	ections have been added.	
07/01/2022				
End Date *				
Defaults to fiscal year. Actual dates can be entered.				
06/30/2023				

#### 20



- 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.

ıllı.	Planning		
* @	TEST TACTIC 1 Select a Supports (Rel	ated DOWN) Item	
*	🗎 FY 2023 👻		Supports (Connected Up)
5	C search	IE-Institutional Effectiveness IE 01.1.1:MEASURE, OUTCOMES & RESULTS 7/1/22 - 6/30/23	Test Goal 1 O IE-Institutional Effectiveness UNIT GOAL
6	Augusta University AA Academic Affairs - University	Show 10 + Viewing 1-1 of 1	This item
<u> </u>	IE-Institutional Effectiveness		(Connected Down) No Connections have been added.

- 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.</li>

<b>d</b> h	Planning			
*				
æ	TEST TACTIC 1			
ς.	Select a Supports (Re	lated DOWN) Item		
٠		FILTER		Supports
	➡ FY 2023 ▼	Test Measure 1		(Connected Up)
	Stanual Plan	IE-Institutional Effectiveness	✓	Test Goal 1 8
	Q search	IE 01.1.1:MEASURE, OUTCOMES & RESULTS	7/1/22 - 6/20/23	
	Augusta University	Show 10 + Viewing 1-1 of 1		This Item
	AA Academic Affairs - University			Supported By
	IE-Institutional Effectiveness			(Connected Down) 9
				Test Measure 1 E-institutional Effectiveness MEASURE, OUTCOMES & RESULTS 10
			8 🖊	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.)

Planning		
FY 2023 / ANNUAL PLAN		
Edit Plan Item		
Template: TACTIC	a Permissions	1 Related (2) (3 History
Assessment Unit/Department *		
C IE-Institutional Effectiveness	Supports (Connected LID)	+ Supports
Tactic Number *	(connected op)	
Goals begin at 01. Tactics begin at 01.1, 01.2, and 01.3. Measures begin at 01.1, 1, 01.1.2, 01.1.3. IE 01.1	Test Goal 1 IE-Institutional Effectivenes	s UNIT GOAL
Tactic *		
Short descriptive phrase to represent tactic. If tactic is short, entire tactic 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 datactivation, plesse include your intention as a a factic/chaon under an education-focused Goal.		This Item
Test Tactic 1	Supported By	+ Supported By
Start Date *	(Connected Down	1)
Defaults to fiscal year. Actual dates can be entered.	10 Nort Manager 1	
07/01/2022	IS-Institutional Effectivenes	s MEASURE, OUTCOMES & RESULTS

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.

	l I	Planning						
2a 2b	* 20 •	<ul> <li>FY 2023</li> <li>Annual Plan</li> </ul>	v v	FY 2023 / ANNUAL PLAN IE-Institutional EI T Plan Items Reports	ffectiveness Documents			
		My Units	Institution	FILTER		Sort	Default 🔹	+ Plan Item +
		Augusta Universit AA Academic Affa	ty irs - University	Test Goal 1 IE-Institutional Effectiveness IE 01:UNIT GOAL 14 Supported By (2)				Active 7/1/22 - 6/30/23
		IE-Institutional Eff	fectiveness	Test Tactic 1				
				IE-Institutional Effectiveness IE 01.1:TACTIC 🕻 Supported By (1)				Active 7/1/22 - 6/30/23
			3	Test Measure 1				
				IE-Institutional Effectiveness IE 01.1.1:MEASURE, OUTCOMES & RESU	llts †↓			Active 7/1/22 - 6/30/23
				Show 10 + Viewing 1-3 of 3				



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.

Assessme	ent Method	
The specific	method to be used to gather and assess the measurement.	
Test - D	ate Driven	
Threshold	d Level	
The minimu	Im standard of performance expected	
Test - N	larch 2023	
Target Le	vel	
The preferr	ed level of performance	
Test - F	ebruary 2023	
High Perf	ormance Level	
The level as	sociated with exceptional achievement of results	
Test - Ja	inuary 2023	
Mid-Year	Progress Level	
Please choo	ise the progress level achieved or anticipated by the Mid-Year Update.	
	Ψ.	
High pe	erformance achieved/anticipated	
Target	achieved/anticipated	
Thresh	old achieved/anticipated	
Thresh	old not achieved/anticipated but Progress Made	
No pro	gress/Canceled	

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

Mid-	<b>Year /</b> was th	e actual Result(s	\$) hieved?	>										
File	Edit	View Insert	Form	at To	ols	Table								
6	ð	Paragraph	~	в	Ι	₽	Ξ	∃	≣	₫	₫	ίΞ	~ :	:≡ ~

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.

<b>d</b> i	Planning	
*		
æ		FY 2023 / ANNUAL PLAN
ς.	🗣 Annual Plan 🔹	IE-Institutional Effectiveness
٠	My Units Institution	Plan Items Reports Documents
	Q search	FILTER Sort Default • Han Item •
	Augusta University 1	Test Goal 1
	AA Academic Affairs - University	IE-Institutional Effectiveness         Active           IE 01:UNIT GOAL 11 supported By (2)         7/1/22 - 6/30/23
	IE-Institutional Effectiveness	
		Test Tactic 1
		IE-Institutional Effectiveness Active
		IE 01.1:TACTIC 🖡 supported By (1) 7/1/22 - 6/30/23
		Test Measure 1
		IE-Institutional Effectiveness Active IE 01.1.1:MEASURE, OUTCOMES & RESULTS 11 7/1/22 - 6/30/23
		Show 10 • 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.

Paragraph	~	~ B	Ι	≡	Ξ	∃ ≣	≣   •	ē ē	⊞ ~ ⊞ ~
	Paragraph	Paragraph	Paragraph $\vee$ <b>B</b>	Paragraph $\vee$ <b>B</b> $I$	Paragraph ∨ B I ≡	Paragraph $\vee$ <b>B</b> $I \equiv \Xi$	Paragraph ~ B I = = = =	Paragraph ∨ B I ≡ Ξ Ξ Ξ	Paragraph ∨ B I Ξ Ξ Ξ Ξ Ξ Ξ

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.

	dh.	Planning
	*	
	æ	FY 2022
1	Υ.	Dashboard

- 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.

2a 2b	* & •	Planning  FY 2023  Annual Plan	FY 2023 / ANNUAL PLAN IE-Institutional Effectiveness Telen Items Reports Documents			
		My Units Institution	FILTER	Sort	Default 💌	+ Plan Item +
		Q search				
		Augusta University	Test Goal 1			
		AA Academic Affairs - University	IE-Institutional Effectiveness IE 01:UNIT GOAL 14 Supported By (2)			Active 7/1/22 - 6/30/23
2c	-	IE-Institutional Effectiveness				
			Test Tactic 1			
			IE-Institutional Effectiveness			Active
			IE 01.1:TACTIC T& Supported By (1)			7/1/22 - 6/30/23
		3	Test Measure 1			
			IE-Institutional Effectiveness IE 01.1.1:MEASURE, OUTCOMES & RESULTS 1			Active 7/1/22 - 6/30/23
			Show 10 + Viewing 1-3 of 3			



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.

S Paragraph     P     Annual Progress Level     Please choose the progress level achieved by the Annual Update.     High performance achieved   Target achieved   Threshold achieved   Threshold achieved   Threshold not achieved/Progress made   No progress/Canceled		1								_							
P Annual Progress Level Please choose the progress level achieved by the Annual Update. High performance achieved Target achieved Threshold achieved Threshold achieved/Progress made No progress/Canceled	50	Paragraph	~	в	Ι	₽	Ξ	3 8	<b>I</b>	ίΞ	×	<b>=</b> ~					
P Annual Progress Level Please choose the progress level achieved by the Annual Update. High performance achieved Target achieved Threshold achieved Threshold achieved/Progress made No progress/Canceled																	
P Annual Progress Level Please choose the progress level achieved by the Annual Update. High performance achieved Target achieved Threshold achieved Threshold achieved/Progress made No progress/Canceled																	
P Annual Progress Level Please choose the progress level achieved by the Annual Update. High performance achieved Target achieved Threshold achieved Threshold achieved Threshold not achieved/Progress made No progress/Canceled																	
P Annual Progress Level Please choose the progress level achieved by the Annual Update. High performance achieved Target achieved Threshold achieved Threshold achieved Threshold not achieved/Progress made No progress/Canceled																	
Annual Progress Level Please choose the progress level achieved by the Annual Update. High performance achieved Target achieved Threshold achieved Threshold achieved/Progress made No progress/Canceled	P																
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	Annual Pr	ogress Level															
High performance achieved       Target achieved       Threshold achieved       Threshold not achieved/Progress made       No progress/Canceled	Please choo	e the progress le	wal ach														
High performance achieved Target achieved Threshold achieved Threshold not achieved/Progress made No progress/Canceled		SE UVE DI OLI ESSVE	ever acri	ieved b	by the	Annua	l Upda	te.									
High performance achieved Target achieved Threshold achieved Threshold not achieved/Progress made No progress/Canceled		se une progress ie	ver acri	ieved b	by the	Annua	l Upda	te.		 				÷			
Target achieved Threshold achieved Threshold not achieved/Progress made No progress/Canceled		se trie progress ie	ver acri	ieved b	by the	Annua	l Upda	te.						×			
Threshold achieved Threshold not achieved/Progress made No progress/Canceled	High po	rformanco ac	hiovo	d	by the	Annua	l Upda	te.		_		_		•			
Threshold not achieved/Progress made No progress/Canceled	High pe	rformance ac	hieve	d	by the	Annua	l Upda	te.					 	•			
No progress/Canceled	High pe Target a Thresho	rformance ac ichieved	hieve	d	by the	Annua	il Upda	te.						•			
	High pe Target a Thresho Thresho	rformance aci ichieved Id achieved	hieveo	d ogres	s ma	Annua	il Upda	te.						•			
	High pe Target a Thresho Thresho No pros	rformance aci ichieved old achieved old not achieve rress/Cancele	hieved ed/Pro	d d	s ma	Annua	I Upda	te.						•			
	High pe Target a Thresho Thresho No prog	rformance aci ichieved old achieved old not achieve gress/Canceleo	hieved ed/Pro	d ogres	s ma	Annua ide	I Upda	te.						•			
	High pe Target a Thresho Thresho No prog	rformance ac Ichieved Ild achieved Ild not achieve ress/Cancele	hieved ed/Pro	d ogres	is ma	ade	l Upda	te.						•			

- 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.

A	nnua	al Act	ual Resul	:(s)															
И	hat и	as the	actual resu	lt achie	ieved?														
_	File	Edit	View In	ert i	Forma	it To	ols Ta	able											
	5	Ì	Paragrapi	1	~	в	Ι	₽	= =		⊡	≧	ίΞ	~ =	$\sim$				
	P																		
F M Ar as	P Ieasi ny ad ssessi	ure N ditiona ment c	otes V notes or r vole.	flectic	ans on	Measi	ures Re	esults. i	Include a	any add	litional fi	ndings	s, obsta	icles (	or changes	identifie	l in the		
F M Ar as	p leasi ny ad sessi File	ure N ditiona nent c Edit	otes Vinotes or r ycle. View In:	ert f	ons on Forma	Measu t To	ures Re ols Ta	able	Include a	any add	litional fi	nding	s, obsta	ides (	or changes	identifie	l in the		



- 7) **Supporting Documentation:** (*Optional*) Under the <u>Plan Item Files</u> 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.)

	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.	_
	There are no attachments.	7 → + File + Folder
8	Status	
	Active, Complete, Canceled	
	Active 👻	
	<b>m</b> Delete	Read View Done



### ENTERING ANNUAL RESULTS – GOALS

#### Goal-Level Update:

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

• <b>8</b> • 1	Planning		🌲 📧 Brittany
* *	<ul> <li>B FY 2020 ▼</li> <li>Annual Plan ▼</li> </ul>	V 2020 / ANNUAL PLAN V IE-Institutional Effectiveness	
	My Units Institution Q search	Import         Default	➡ Plan Item ▼
	Augusta University AA Academic Affairs - University	IE-Institutional Effectiveness IE 01:UNIT GOAL []	Active 7/1/19 - 6/30/20
	IE-Institutional Effectiveness	TEST Tactic 1 IE-Institutional Effectiveness IE 01.1:1ACTIC II	Active 7/1/19 - 6/30/20
		TEST Tactic 2 IE-Institutional Effectiveness IE 01.2:TACTIC II	Active 7/1/19 - 6/30/20
		TEST Measure 01.1.1 IE-Institutional Effectiveness IE 01.1.1:MEASURE, OUTCOMES & RESULTS 11	Active 7/1/19 - 6/30/20

- 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.

ġ.	Planning
<b>A</b>	Status 🔶 2
•	Active, Complete, Canceled
m	Active 🔹
۵	Mid-Year Results Summary Provide a summary of your results for this goal to date. Include how you plan to use these results.
	File • Edit • View • Insert • Format • Tools • Table •
	Sometrials → B I E E E E E E E E E E E
3_	Annual Summary of Results Summarize the progress for this goal for the year and include the final outcome(s). (This information was formerly included in the annual assessment report.)
	File • Edit • View • Insert • Format • Tools • Table •
	★ Pormats ▼ B I E E E E E E E E Ø ■
4_	ACTIONS FOR IMPROVEMENT (How will these results be used for improvement?) What specific actions will be implemented based on your annual analysis and results for this goal? How will these actions lead to continuous improvement and further the unit's mission?
	File • Edit • View • Insert • Format • Tools • Table •
	★ Pormats B I E E E E E E E E E E E E



- 5) **Supporting Documentation:** (*Optional*) Under the <u>Plan Item Files</u> 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.
- 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.

80/23 -

	dh.	Planning	
	*	2	
	æ	🛱 FY 2023 🔹	FY 2023 / ANNUAL PLAN
1	Υ.	Annual Plan	IE-Institutional Effectiveness
	٠	My Units Institution	Plan Items
		Q search	FILTER
		Augusta University	Test Goal 1
		AA Academic Affairs - University	IE-Institutional Effectiveness IE 01:UNIT GOAL 14 Supported By (2)
4-	1	IE-Institutional Effectiveness	

- 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. FY23 Unit Goals - Alignment to Creating a Legacy This report has been shared from Augusta University and can only be modified there. FY23 Unit Goals are listed with alignment to Creating a Legacy Distinguishing Objectives View Report: 7/1/22 - 6/30/23 -FY23 Unit Plan Mid-Year and Annual Report This report has been shared from Augusta University and can only be modified there. Cumulative summary of goals. Serves as a summary of FY23 mid-year and annual results. (Related tactics and measures when run as Word, Adobe, and Excel.) View Report: 7/1/22 - 6/30/23 -🖹 View Report Customize Dates ear and Annual Report with Strategic Goals CSV Report ared from Augusta University and can only be modified there. Word Export rategic goals and annual unit goals. Serves as a summary of FY23 mid-year and annual results. (Related tactics and measures when run as Print



### **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.

	Planning					
*						
Ð		FY 2023 / ANNUAL PLAN				
Υ.	😭 Annual Plan 🔹	IE-Institutional Effectiveness				
۵	My Units Institution	Verifier Plan Items				
		FILTER	Sort	Default 🔹	+ Plan Item +	
	Q search			Default		
	Augusta University	Test Goal 1	2	Item Name		
	AA Academic Affairs - University	IE-Institutional Effectiveness IE 01:UNIT GOAL TL supported By (2)		Number Identifier Progress Template Name	Active 7/1/22 - 6/30/23	
	IE-Institutional Effectiveness			Start Date		
		Test Tactic 1		LING DOLL	1	
		IE-Institutional Effectiveness IE 01.1:TACTIC TL Supported By (1)			Active 7/1/22 - 6/30/23	



- 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.

dh	Planning							
*								
Ð		FY 2023 / ANNUAL PLAN						
$\nabla^{*}$	😭 Annual Plan 🔹	IE-Institutional Effectiveness						
٠	Mullette Locale	🚏 Plan Items 📑 Reports 🖿	Documents					
	institution	FILTER UNIT GOAL		Sort Default				
	o search 3a	Filter list to only show selected items	5.					
	Augusta University	Progress Options	Templates		*			
	AA Academic Affairs - University	None 3b	UNIT GOAL		Active 7/1/22 - 6/30/23			
	IE-Institutional Effectiveness	Active	TACTIC TACTIC					
		Complete	MEASURE, OUTCOMES & RESULTS					
		🗌 On Hold	College/Division Strategic Goal		Active 7/1/22 - 6/30/23			
		Canceled	UNIT GOAL (FY17 only)					
		Not Applicable	MEASURE, OUTCOMES & RESULTS	<b>3</b> c,				
		In Development	(PT 2 011y)		<ul> <li>Active</li> <li>7/1/22 - 6/30/23</li> </ul>			
				Clear Filters Apply Fil	ters			
	Dianning							
	rianning							
<b>*</b>	m FY 2023 ▼	EV 2022 / ANNU AL PLAN						
<b>~</b> *		IF-Institutional Ff	factivanass					
¥.	Annual Plan		rectiveriess					
*	My Units Institution	T Plan Items Reports Do	ocuments					
	O search	FILTER UNIT GOAL 3		Sort Default 💌	+ Plan Item +			
	2d							
	Augusta University	Test Goal 1			Activo			
	AA Academic Affairs - University	IE 01:UNIT GOAL 14 Supported By (2)			7/1/22 - 6/30/23			
	IE-Institutional Effectiveness	Charles Manufact 4 of 1						
		Show 10 ¢ Viewing 1-1 of 1						