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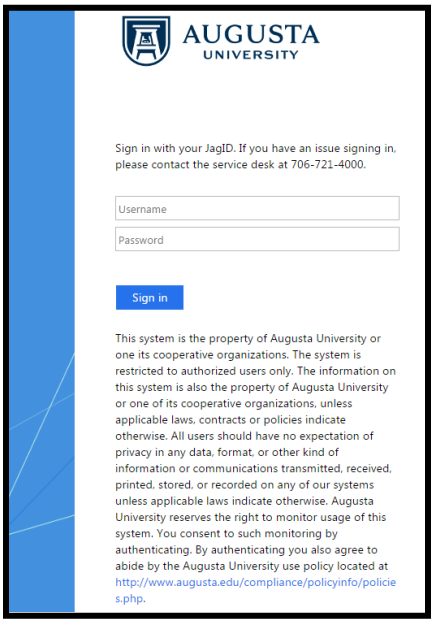
Note: Use the Bookmark feature to locate specific areas of support.

BASIC LOGIN/LOGOUT INFORMATION

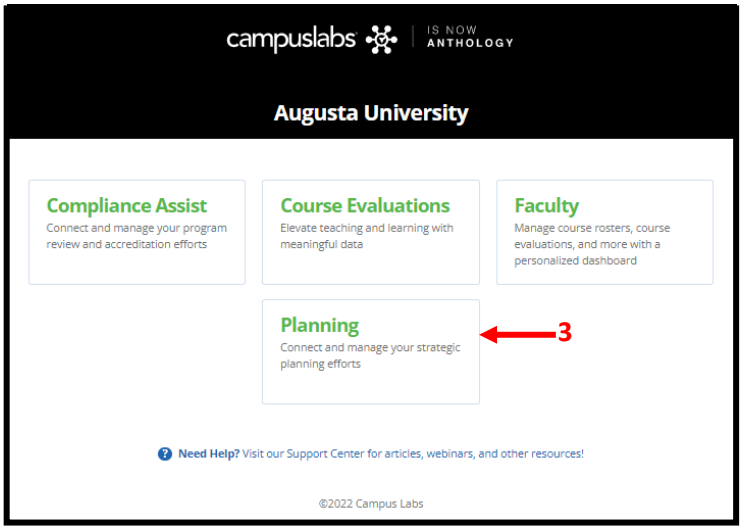
1. To get started, open your internet browser and go to: **https://augusta.campuslabs.com/planning**.
   *(This link is also available on the Institutional Effectiveness website at **www.augusta.edu/ie**.)*

2. You will then be brought to the AU portal. Enter your Jag/NetID and password at this screen:

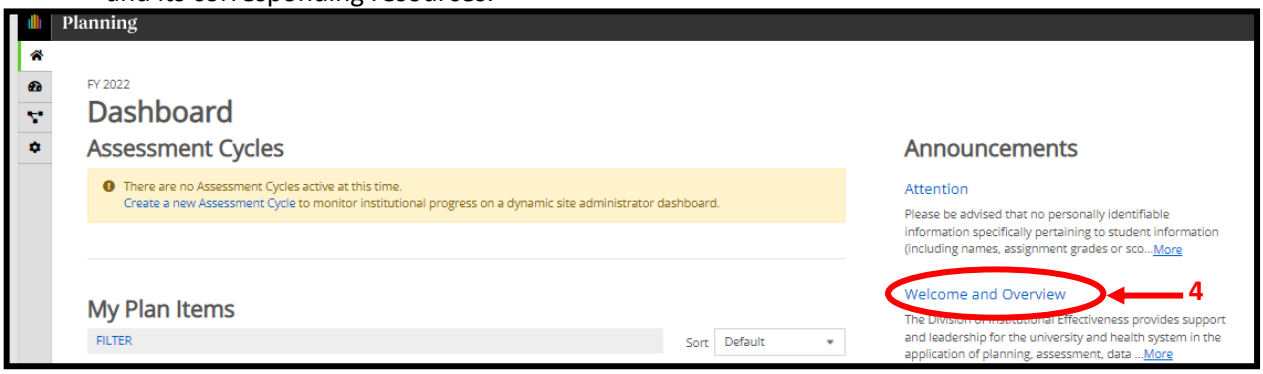


TIP: If you need assistance with your Jag/NetID password or to have it reset, please contact the ITS Service Desk at 706-721-4000

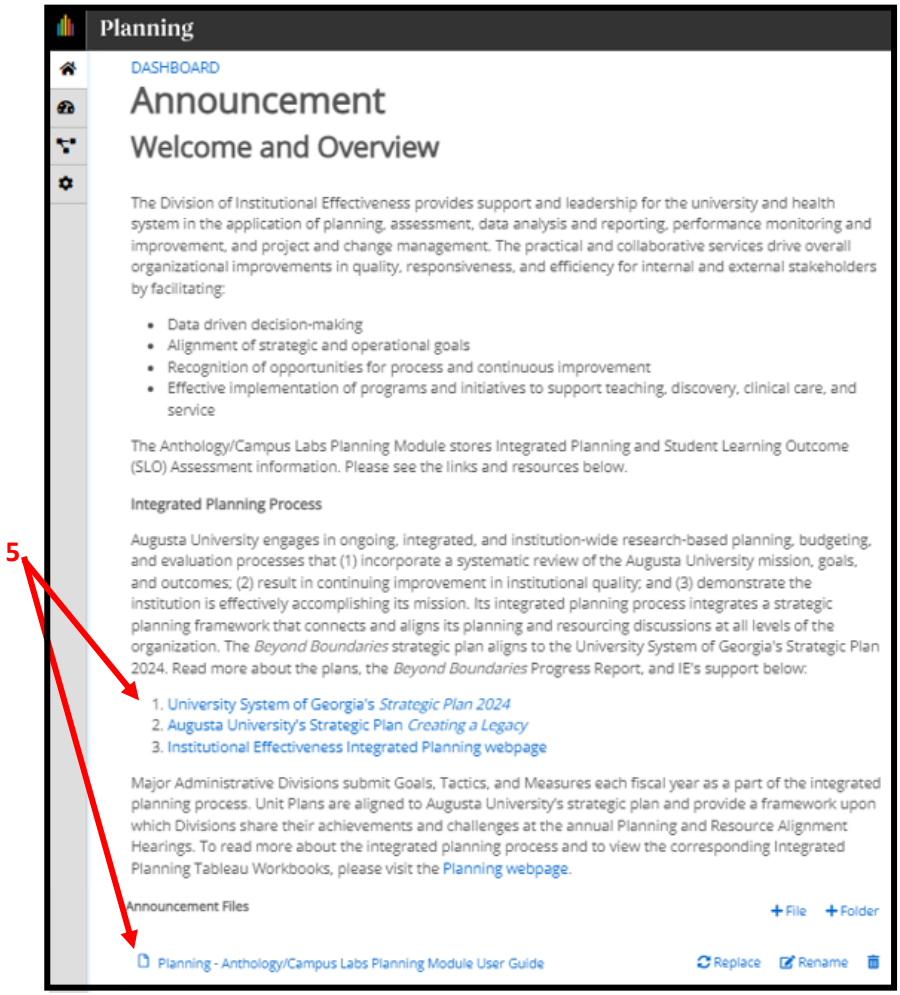
3. Once you have logged in, you will be taken to the following landing page. Click **Planning** to be taken into the Planning module:



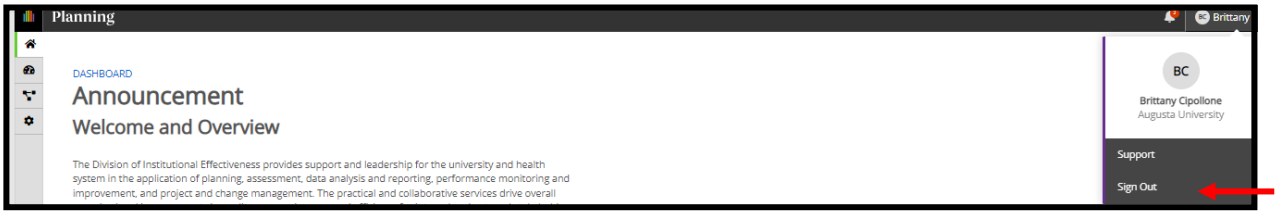
4. Additional announcements and documents relevant to the planning process are located in the Announcements section. Click **Welcome and Overview** to access the Announcements section and its corresponding resources.



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



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

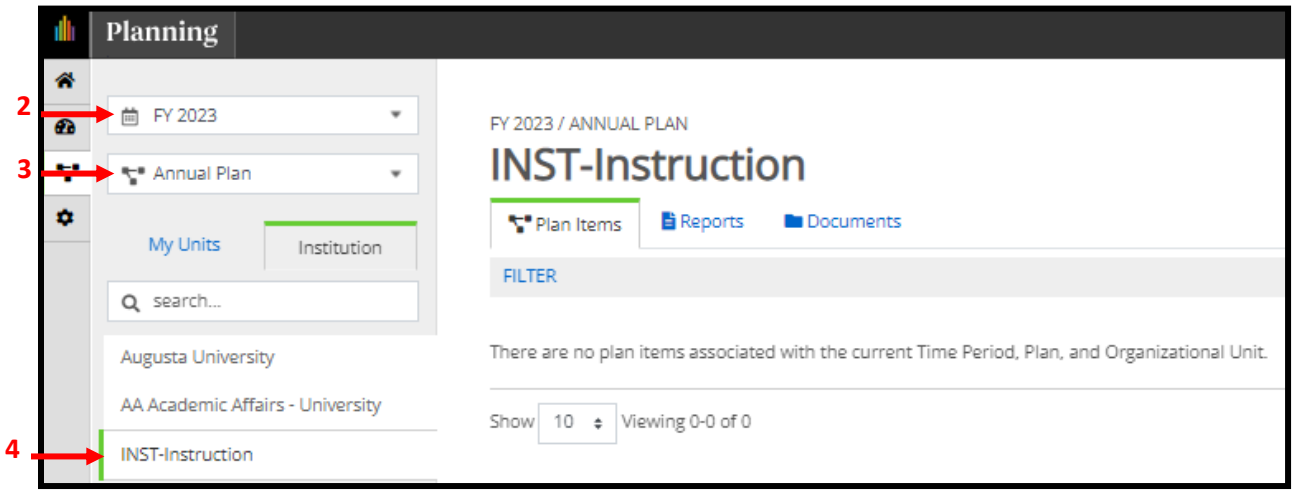
To begin entering your annual plans, you need to start by logging into the system. Click on *Planning* as described above.

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.

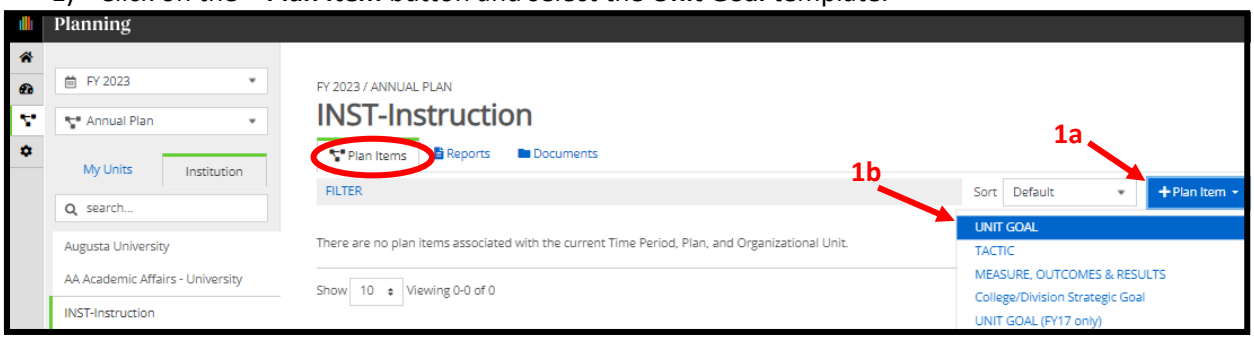
4) Select the **Unit** (or department, if applicable) from the organizational structure on the left for which you are entering information.
NOTE: You may need to click to locate your unit. For example, for INST-Instruction, click on AA Academic Affairs – University → INST-Instruction.



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.

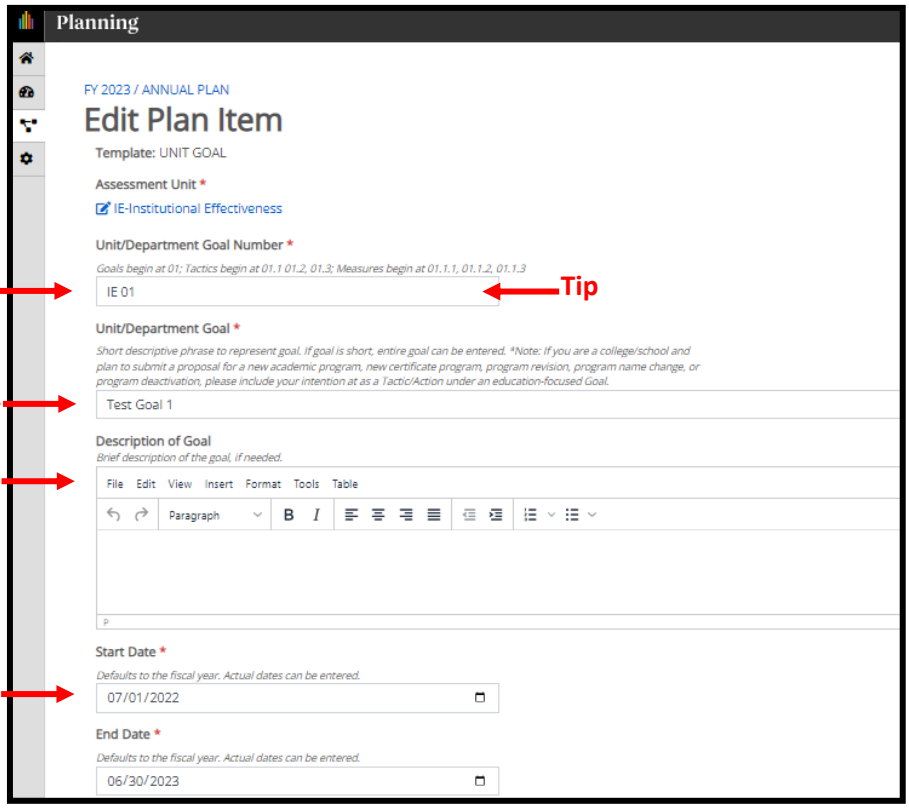
2) **Senior Responsible Leader:** Under the **Assign Responsible Users → Available Users** section, begin typing the last name of the Senior Responsible Leader. The system will begin to populate users. Select the Senior Responsible Leader when his or her name appears.

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.

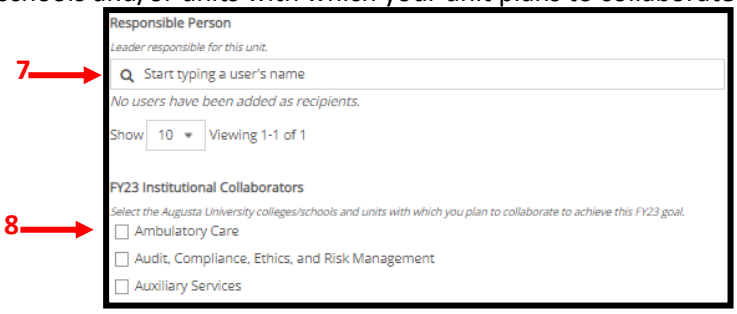
TIP*:* It is important to include the zero at the beginning of Goals 1-9 for the Goals to sort correctly. For Institutional Effectiveness, the Goal numbers would be IE 01, IE 02, . . ., IE 09, IE 10)**.**

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.

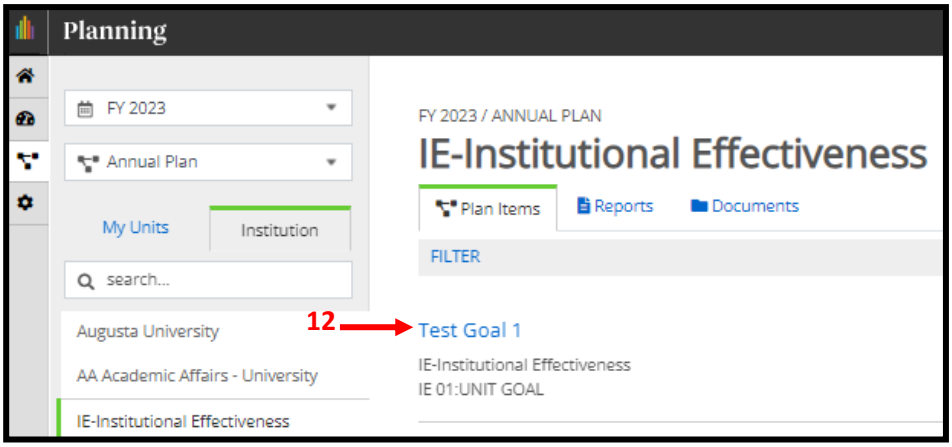


9) **Status:** *(Optional)* Select the **Status** of the Goal. From the drop-down list, select whether this Goal is Active, Complete, On Hold, Canceled, Not Applicable, or In Development. (Refer to the legend below.)

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.

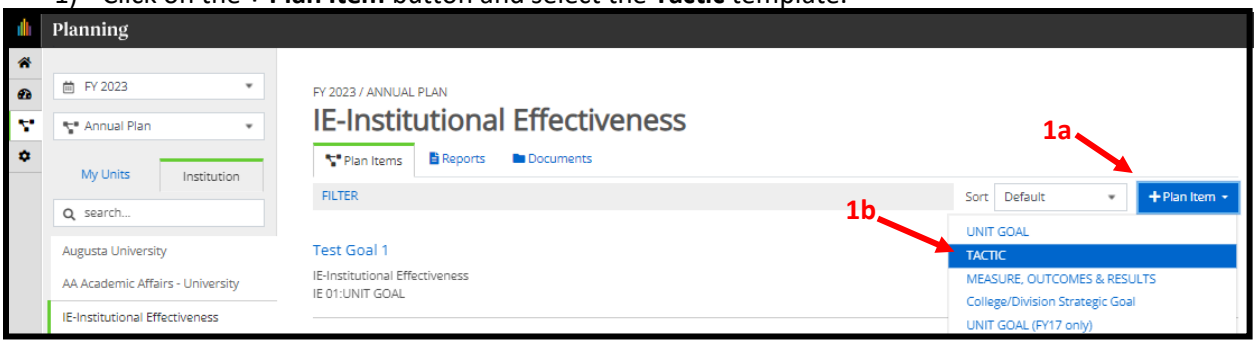
10) **Supporting Documentation:** *(Optional)* Under the Plan Item Files section, click on **+ File**. Select the document you wish to upload. Repeat this process until all documents are uploaded.
11) **Finish:** Click **Done**. (There is no "Save" option since the system has an auto-save feature.)

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.

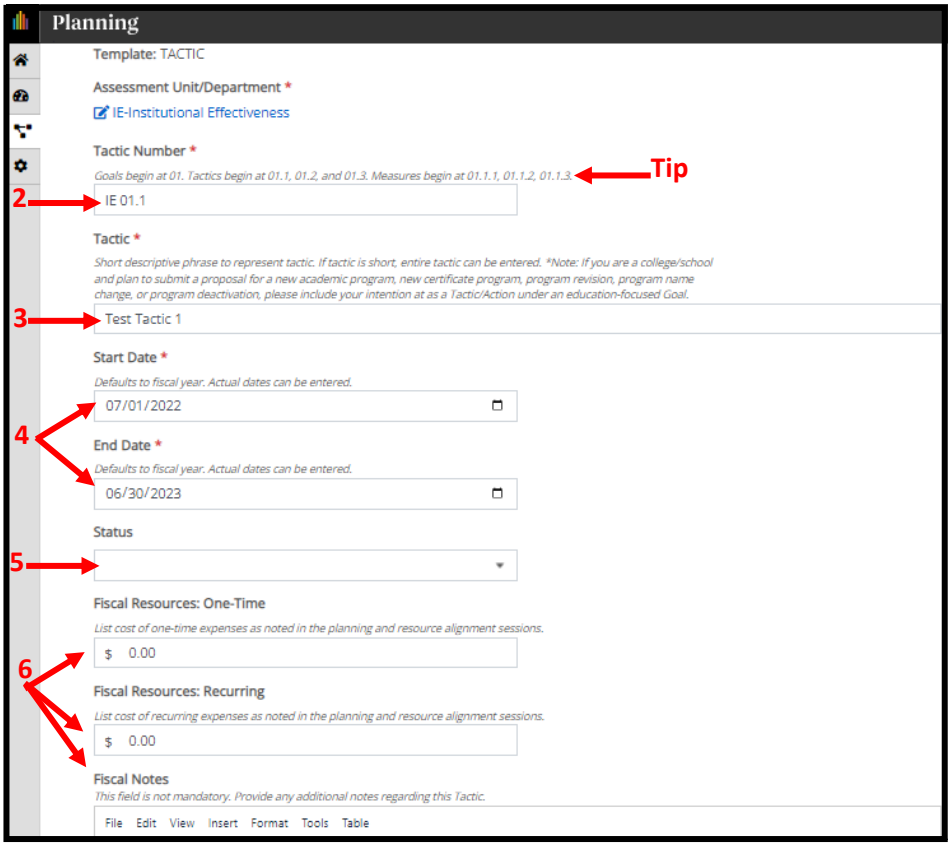


Next, you will complete the **Tactic** template.

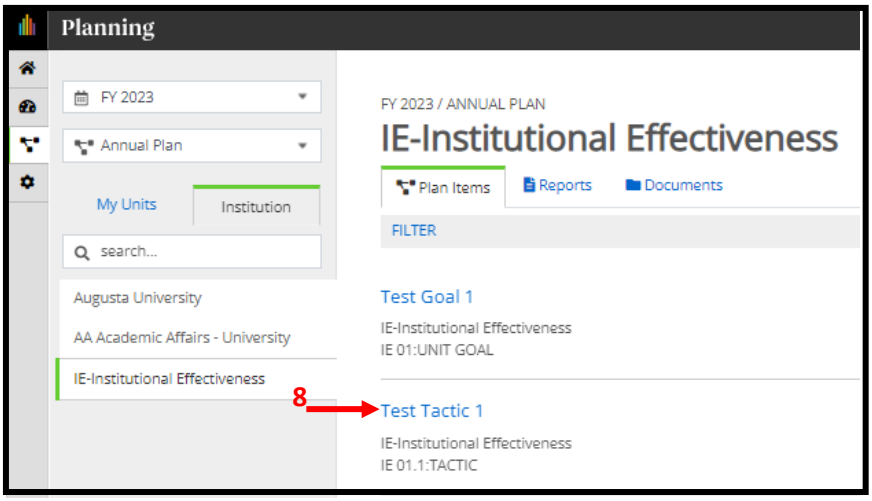
2) **Tactic Number:** Enter the Tactic Number. This number derives from the Goal that this Tactic supports. The first Tactic will be the Goal number followed by a 1.

> **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.)

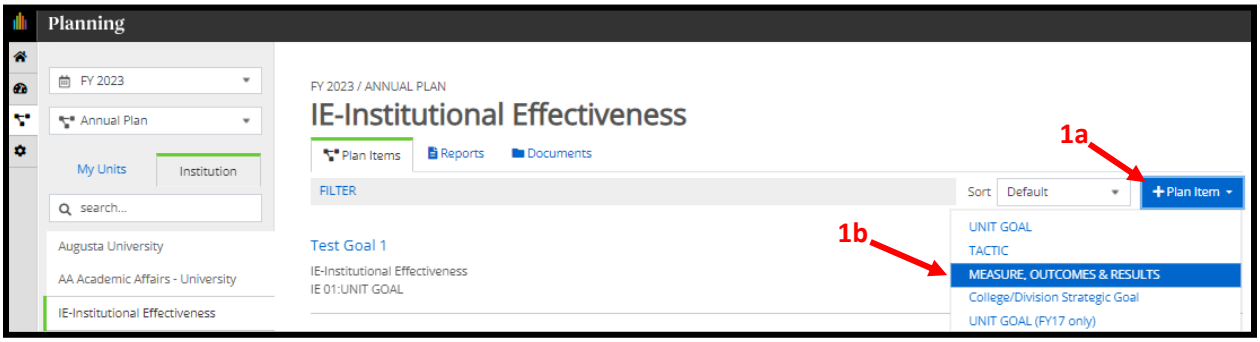


8) **Editing**: To edit the Tactic you just created, click on the item. Make edits to any of the fields, and click Done at the bottom of the screen.



ENTERING MEASURES

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



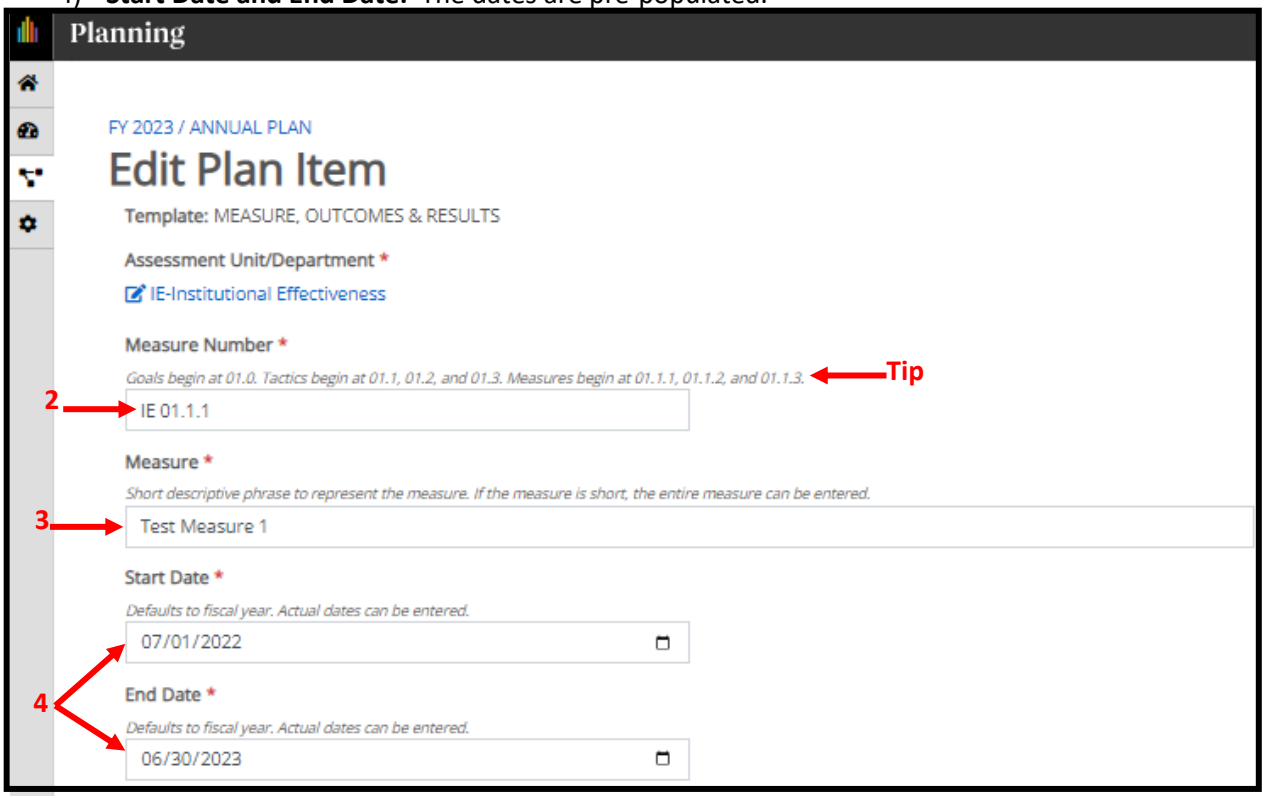
Next, you will complete the **Measures, Outcomes & Results** template. The assessment unit will be generated at the top.

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).

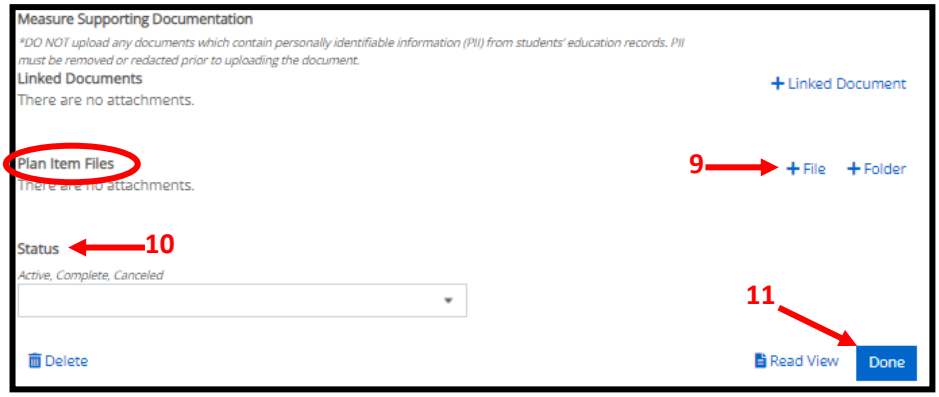
3) **Measure:** Enter your Unit/Department Measure. This is a short, descriptive phrase to represent your Measure.

4) **Start Date and End Date:** The dates are pre-populated.

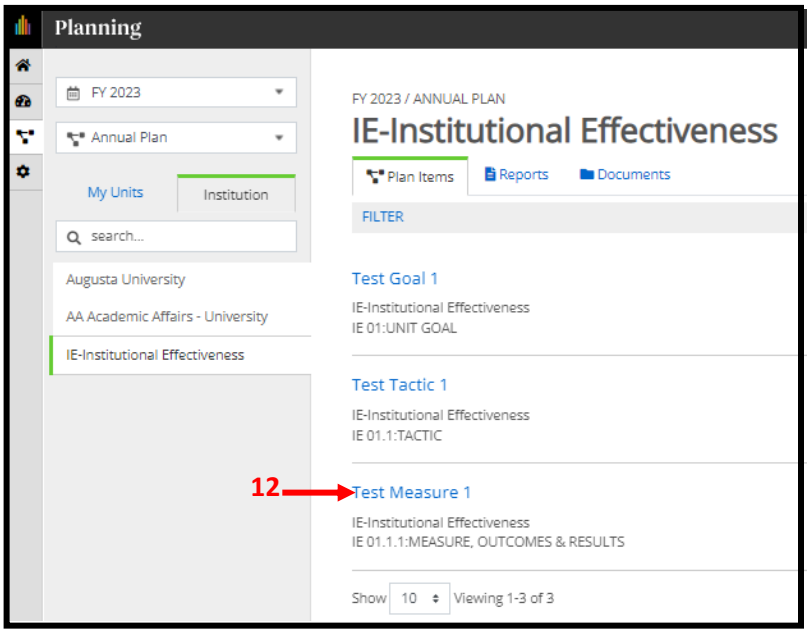


5) **Assessment Method:** Enter the specific method to be used to gather and assess the Measure (i.e. date driven, surveys, quality measures, responsive measures, etc.).
6) **Threshold Level:** Enter the minimum standard of performance expected.
7) **Target Level:** Enter the preferred level of performance.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

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.)



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.

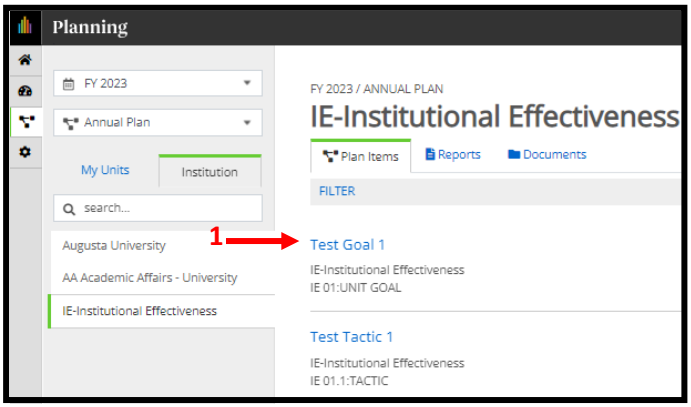


RELATING ITEMS

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

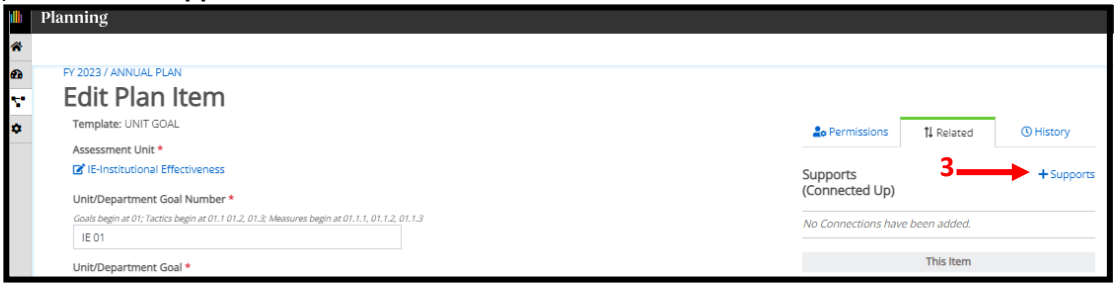
1) Click on your first Goal.



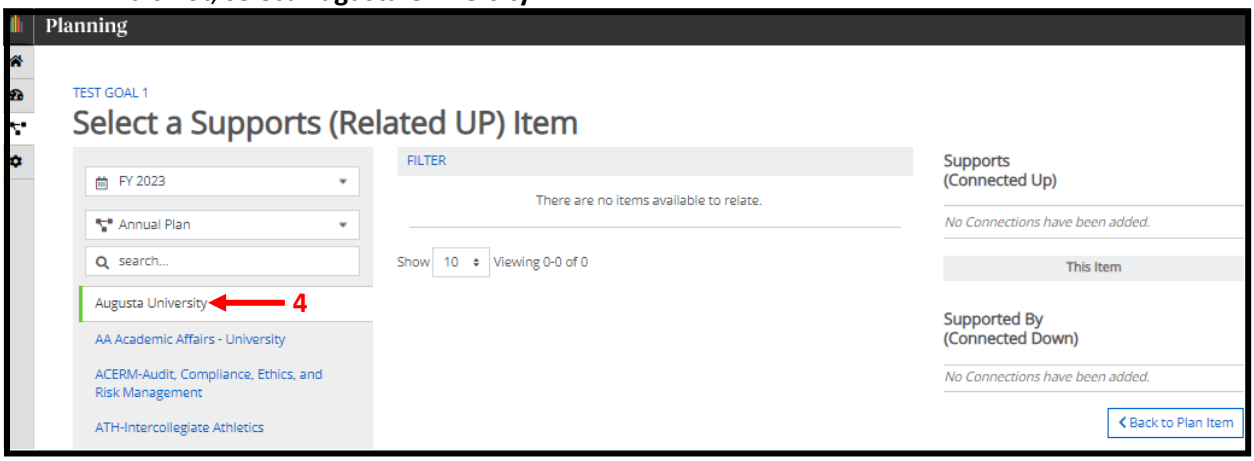
2) Click on the **Related** tab.

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

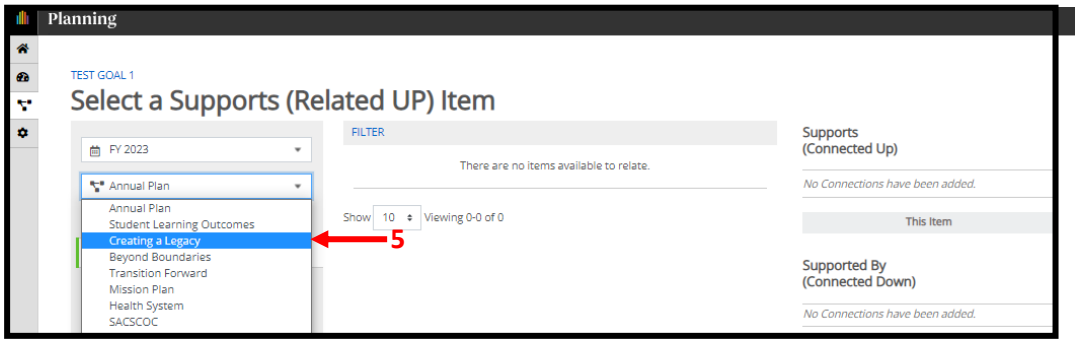
3) Click on **+ Supports**.



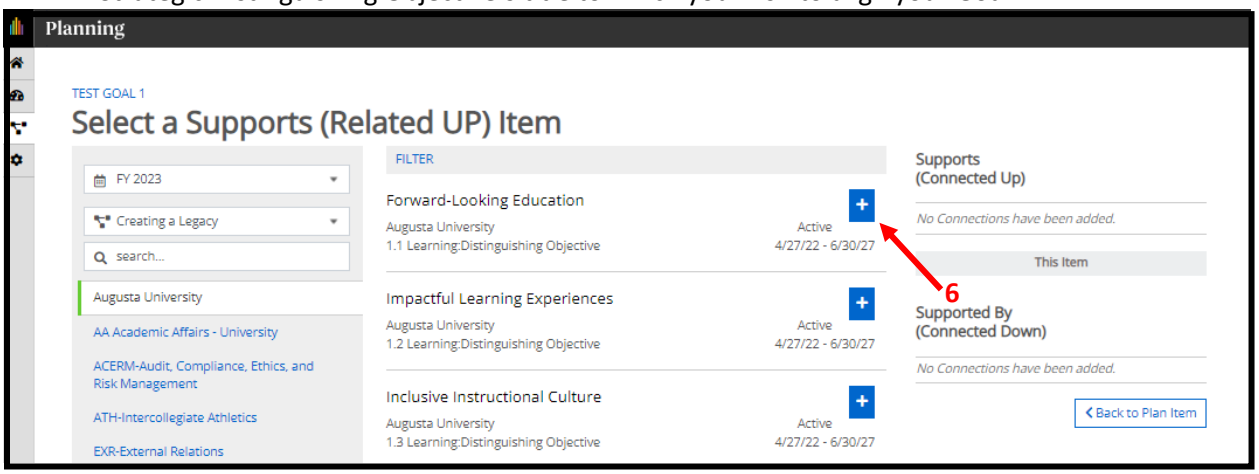
4) The screen should default to where Augusta University is selected on the left side of the screen. If it is not, select **Augusta University**.



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

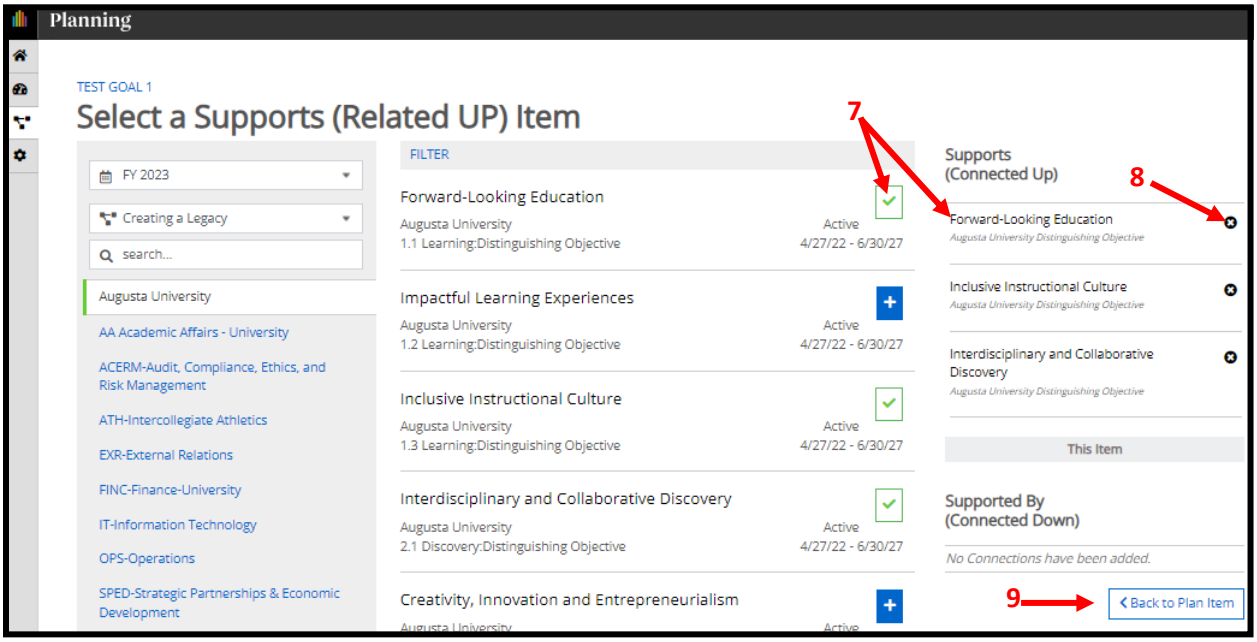


6) Scroll through the list of *Creating a Legacy* Distinguishing Objectives to locate the Strategic Distinguishing Objective(s) to which you wish to relate your Goal. Click the **+ symbol** or the Strategic Distinguishing Objective's title to which you wish to align your Goal.



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."

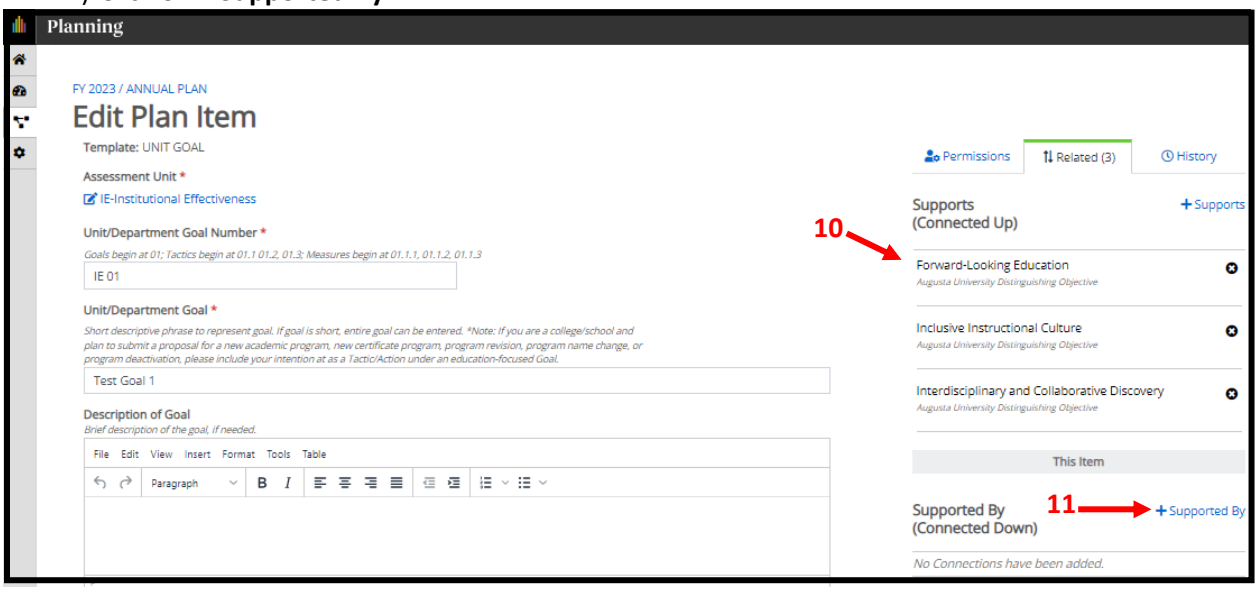
7) Once the Strategic Distinguishing Objective(s) is(are) selected, the + symbol will become a ✓ symbol. The Strategic Distinguishing Objective(s) will appear on the right side of the screen.
8) To remove a Strategic Distinguishing Objective that has been selected, click the ⊗ symbol.
9) Once all Strategic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



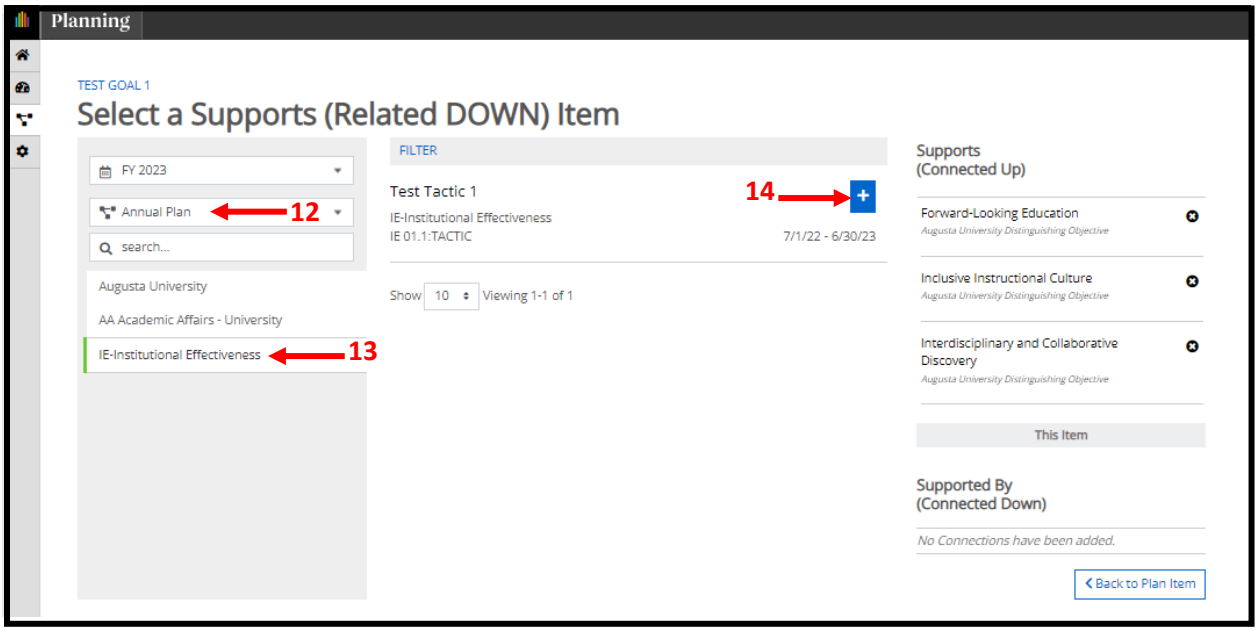
10) The alignment now appears on the right side of the screen under the Supports (Connected Up) section.

Next, relate the Goal to its corresponding Tactics.

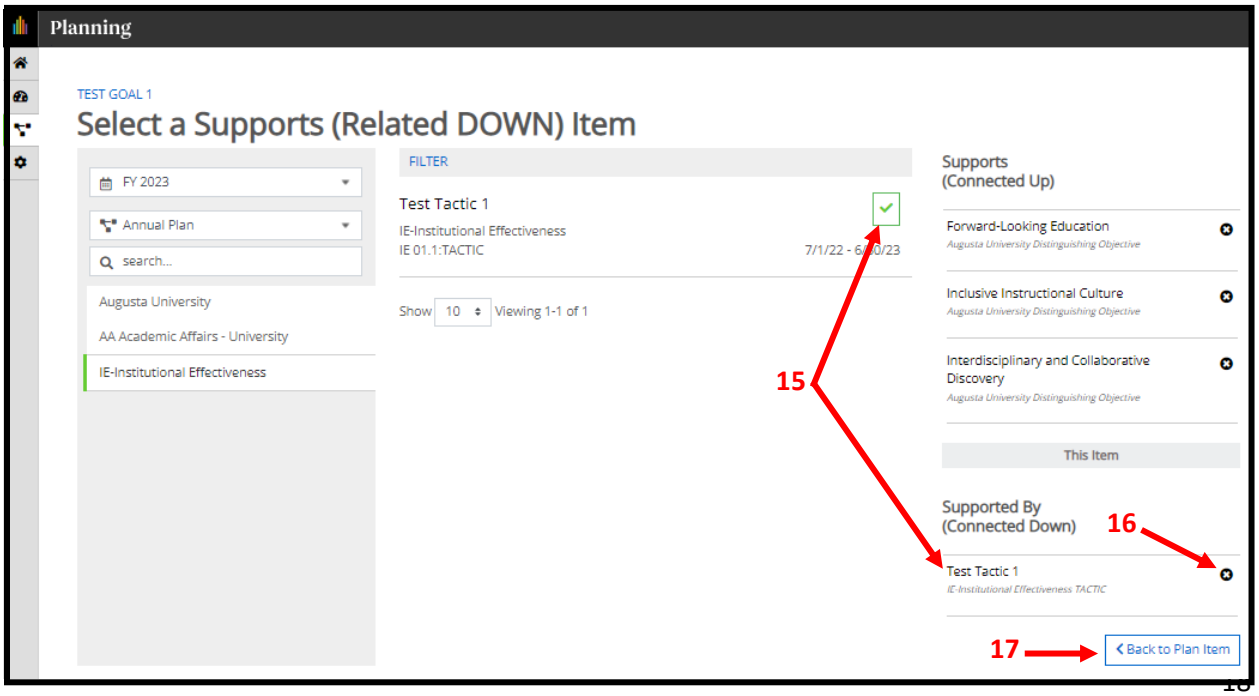
11) Click on **+ Supported By**



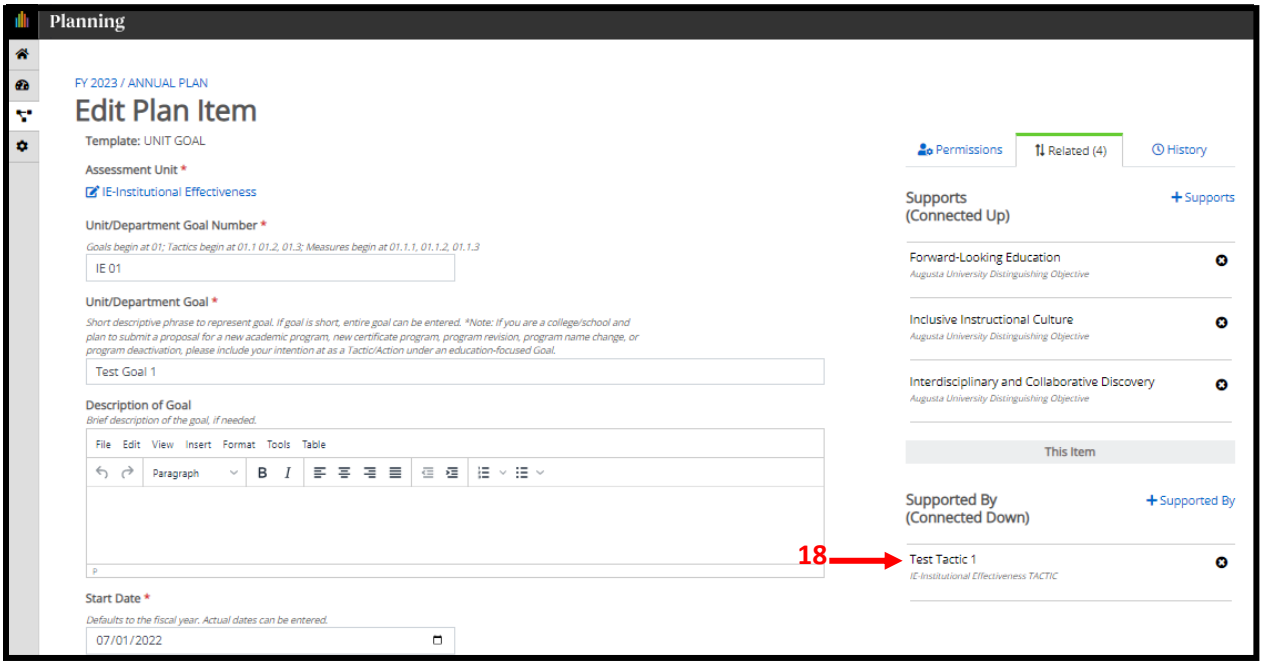
12) The screen should default to where Annual Plan is selected on the left side of the screen. If it is not, select **Annual Plan** from the drop-down list.
13) The screen will default to where Augusta University is selected on the left side of the screen. Select the **Unit** for which you are entering 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**.



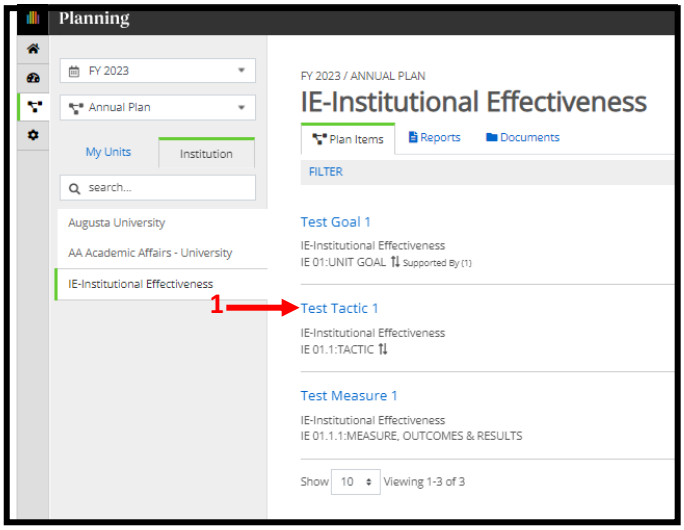
18) The alignment now appears on the right side of the screen under the Supported By (Connected Down) section.



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

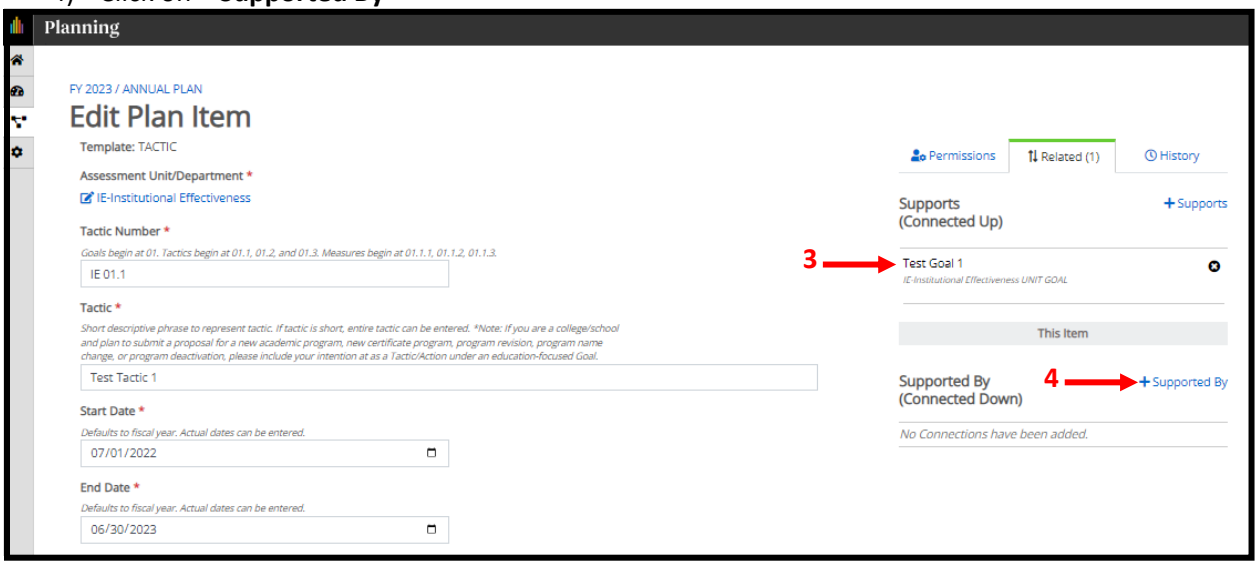
RELATING TACTICS

1) Click on your first Tactic.

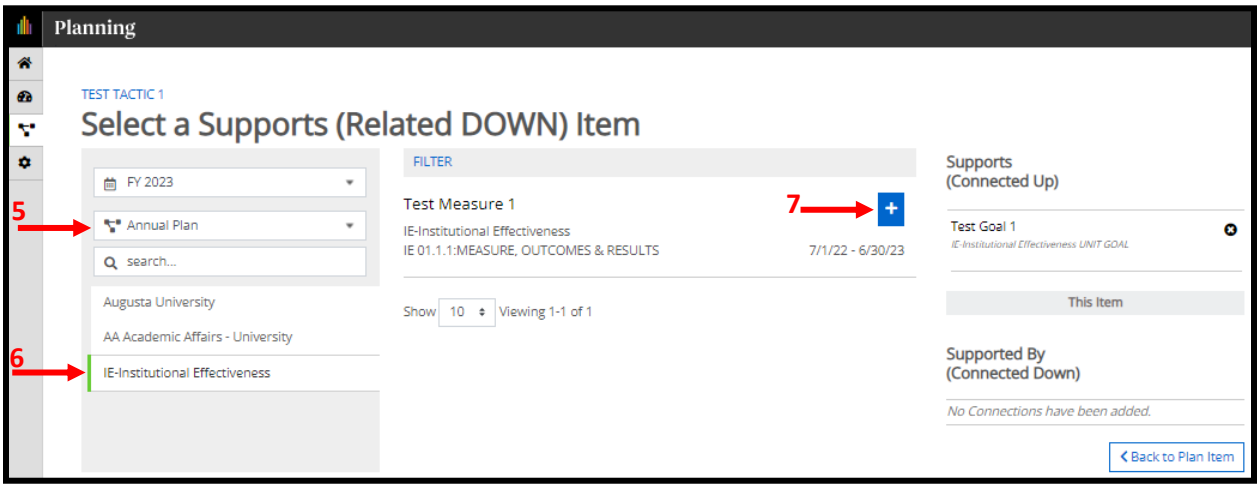


2) Click on the **Related** tab to relate the Tactic to its corresponding Measures.

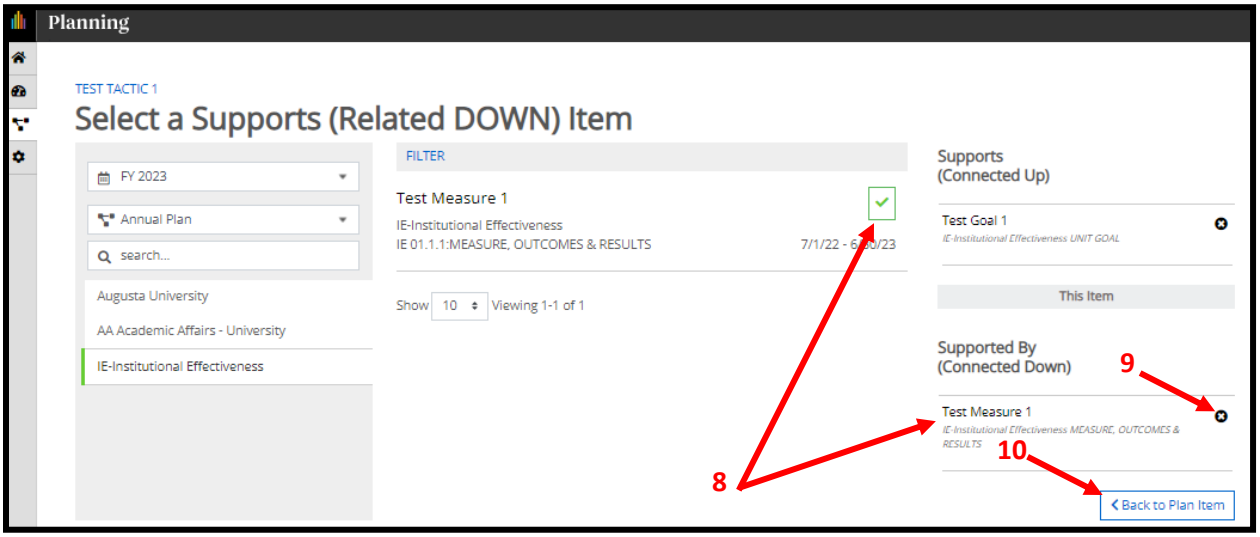
3) Based on the previous steps of relating your Goals to Tactics, the Supports (Connected Up) section should already be populated with its corresponding Goal.
4) Click on **+ Supported By**



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.



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.**



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.)

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.

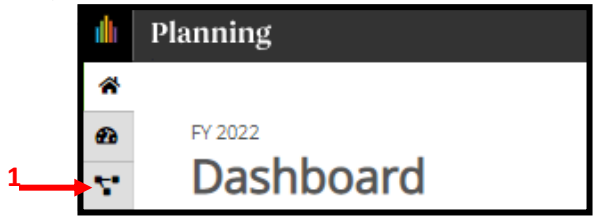
MID-YEAR UPDATE

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.

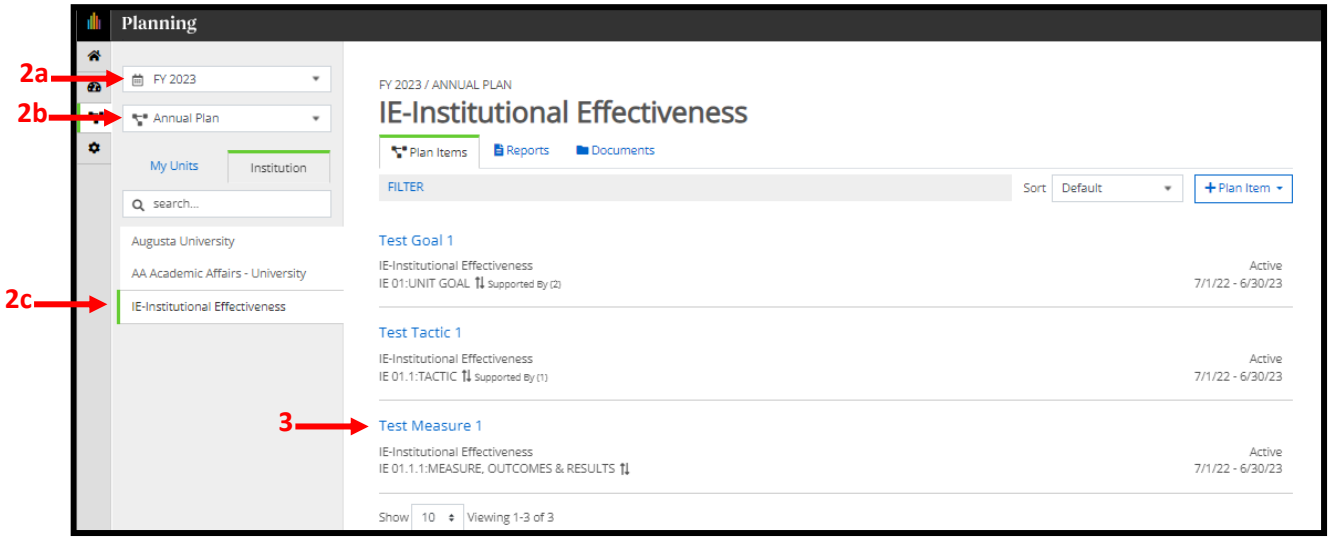
ENTERING MID-YEAR UPDATE – MEASURES

Measure-Level Update:

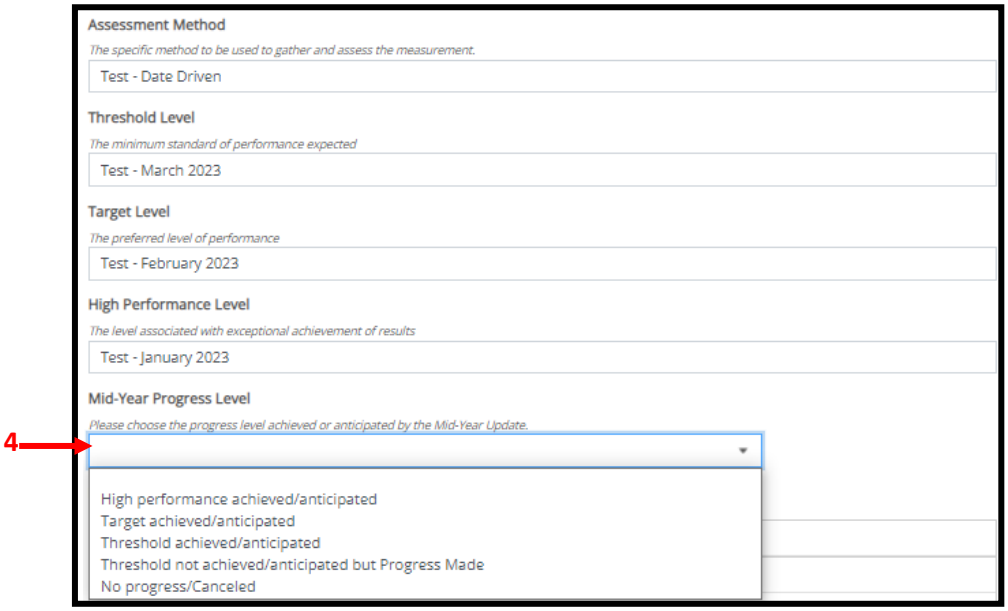
1) Click on the **Plans** tab on the left side of the screen.



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.



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

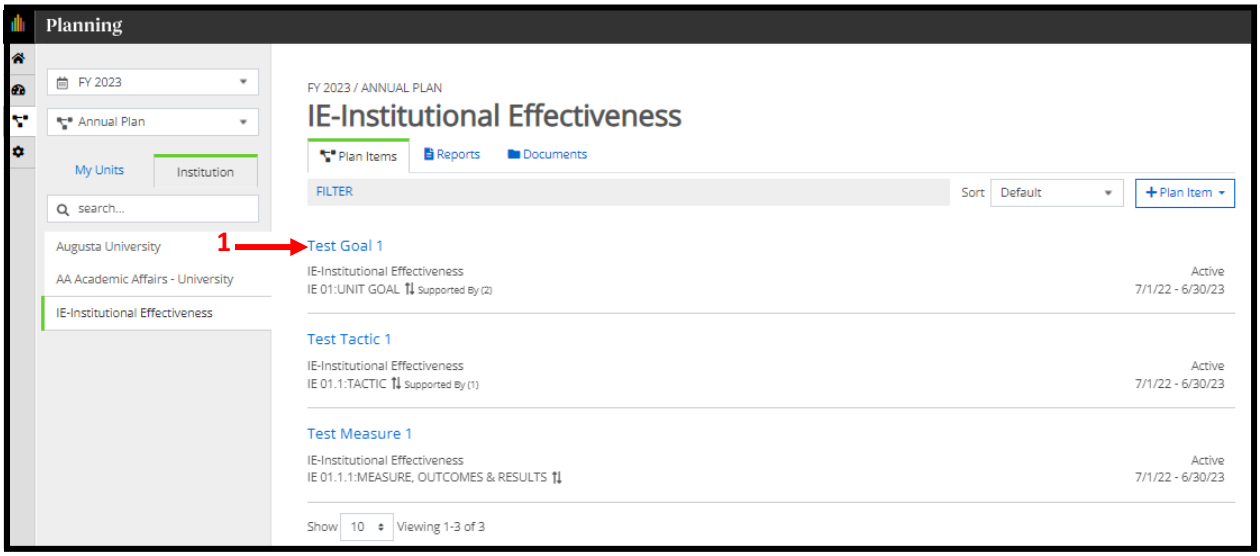
6) **Finish**: Click **Done** at the bottom of the screen. (There is no "Save" option since the system has an auto-save feature.)

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.



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

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

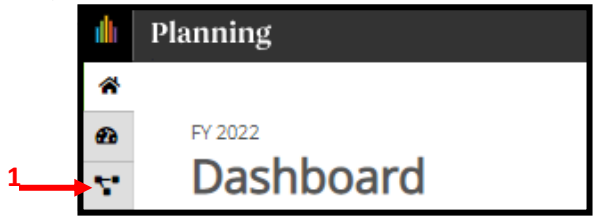
ANNUAL ASSESSMENT RESULTS

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.

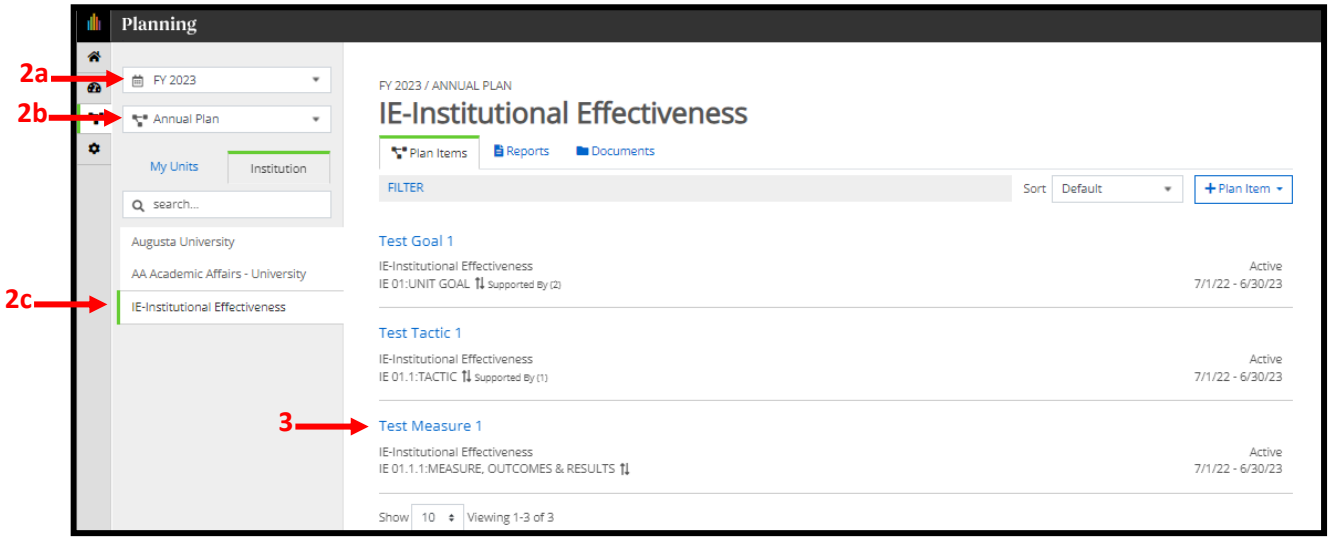
ENTERING ANNUAL RESULTS – MEASURES

Measure-Level Update:

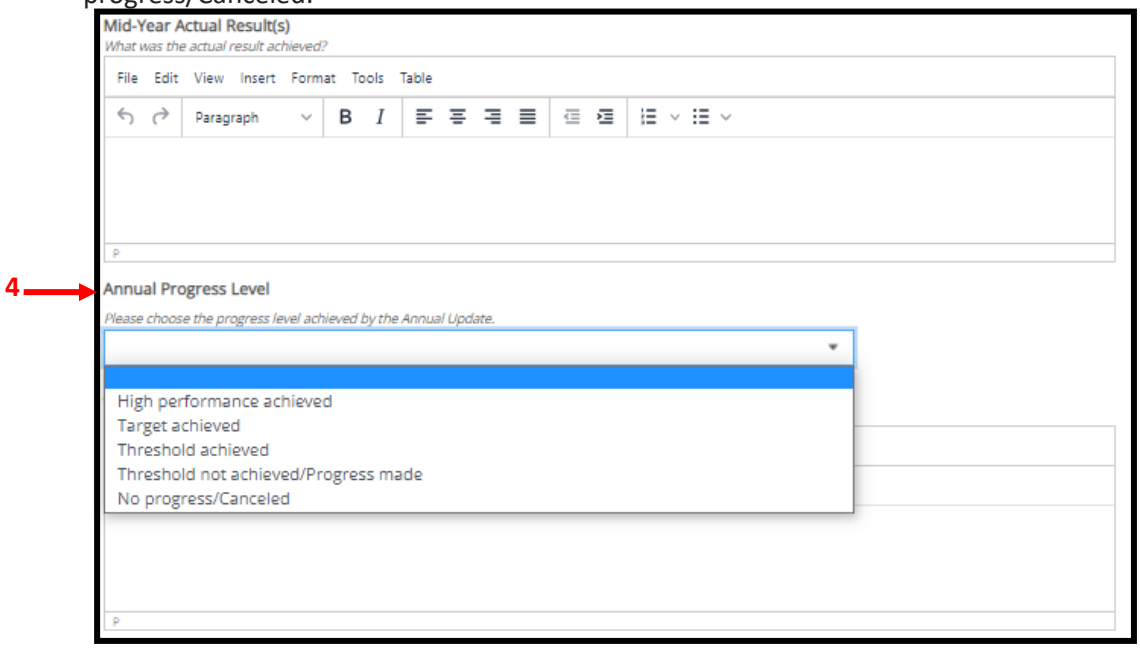
1) Click on the **Plans** tab on the left side of the screen.



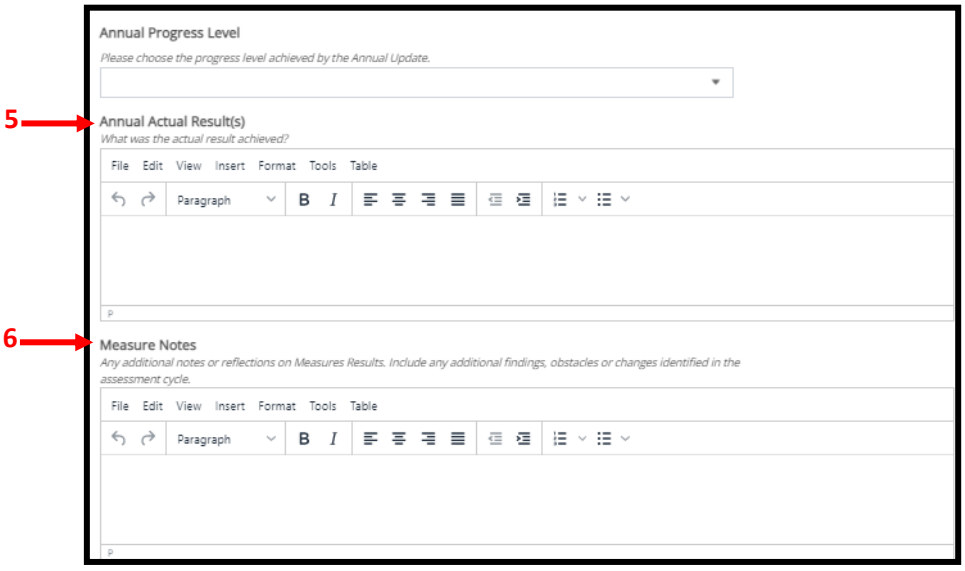
2) a. Select the appropriate **Year**.
   b. Select **Annual Plan**.
   c. Select your **Unit** in the organizational structure on the left.
3) Click the **Measure** for which you wish to report progress.



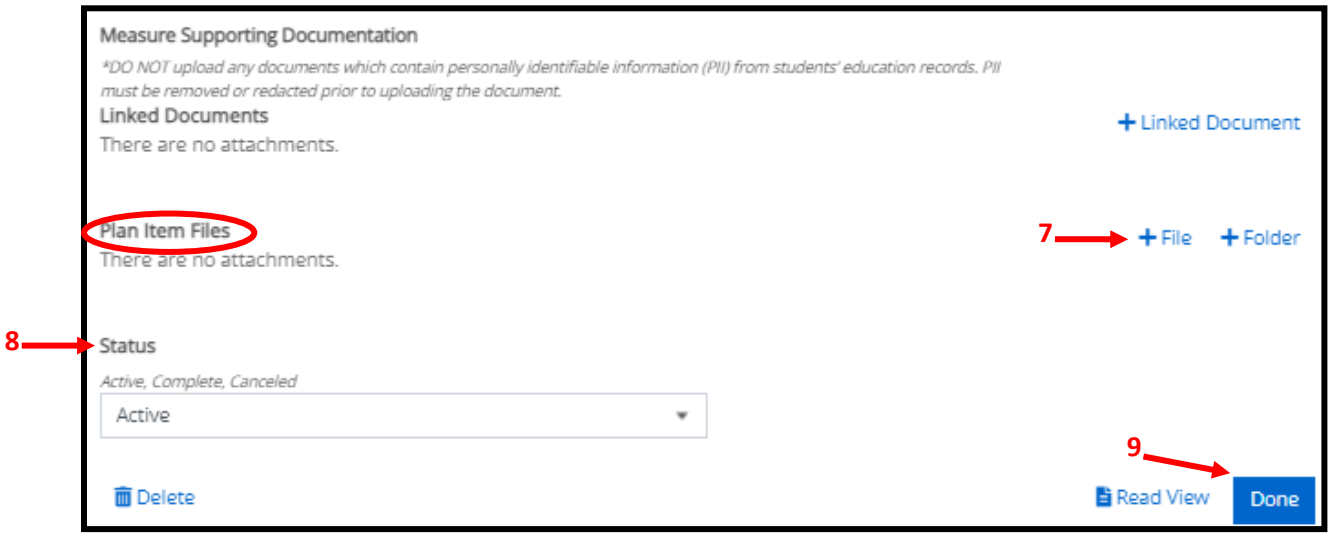
4) From the drop-down list, select the **Annual Progress Level** for this Measure: High performance achieved, Target achieved, Threshold achieved, Threshold not achieved/Progress Made, and No progress/Canceled.



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.



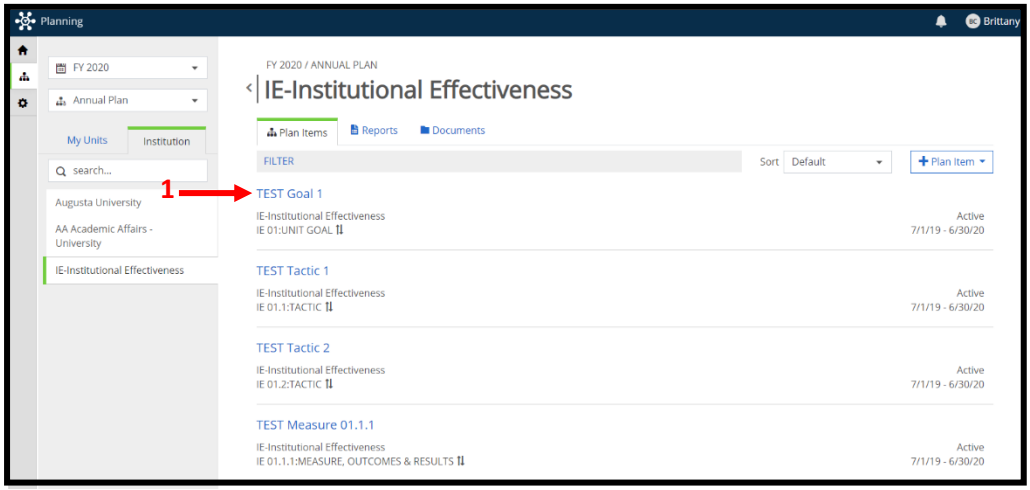
7) **Supporting Documentation:** *(Optional)* Under the Plan Item Files section, click on **+ File**. Select the document you wish to upload. Repeat this process until all documents are uploaded.
8) **Status**: *(Optional)* Update the **Status** of the Measure from the drop-down list. (Reference the 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.)



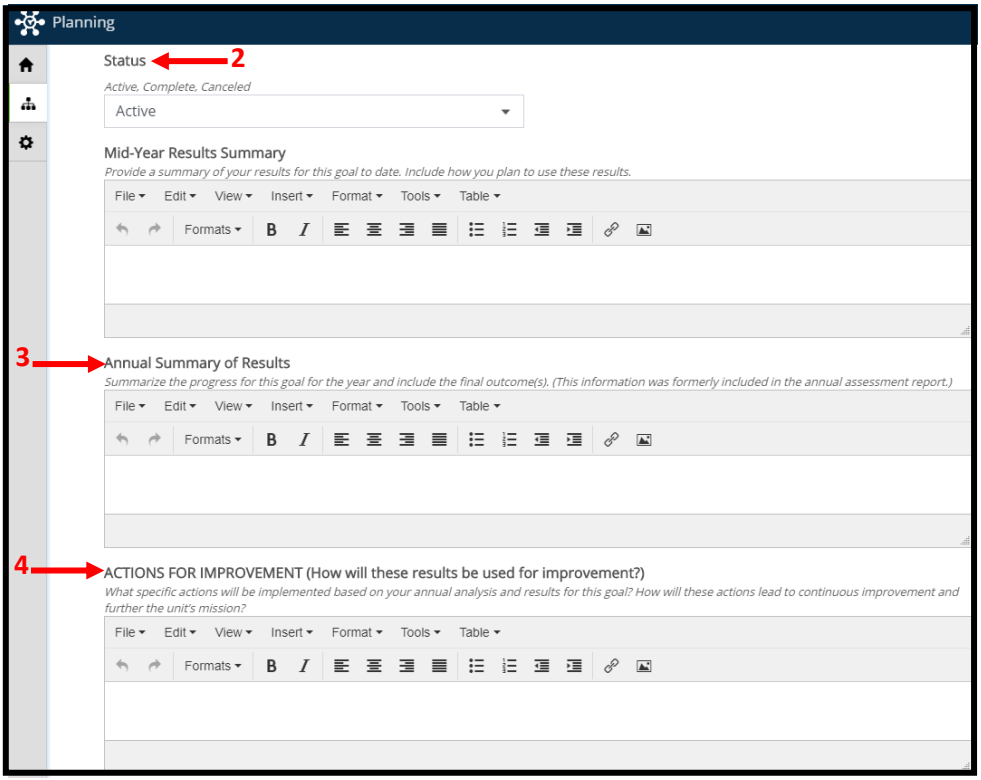
ENTERING ANNUAL RESULTS – GOALS

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.

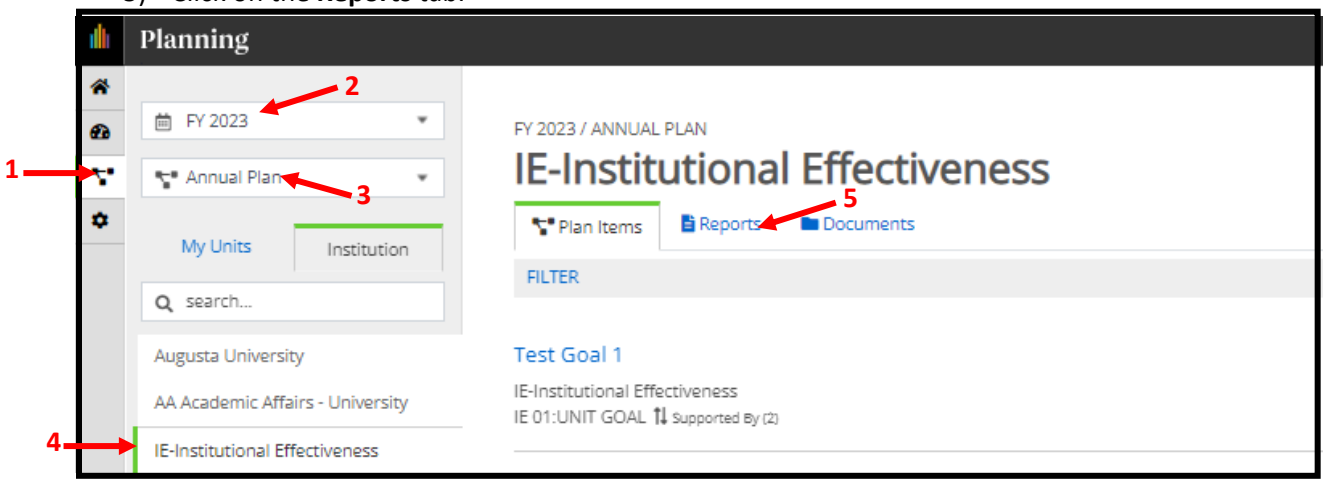


5) **Supporting Documentation:** *(Optional)* Under the Plan Item Files section, click on **+ File**. Select the document you wish to upload. Repeat this process until all documents are uploaded.
6) **Finish:** Click **Done**. (There is no "Save" option since the system has an auto-save feature.)

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.

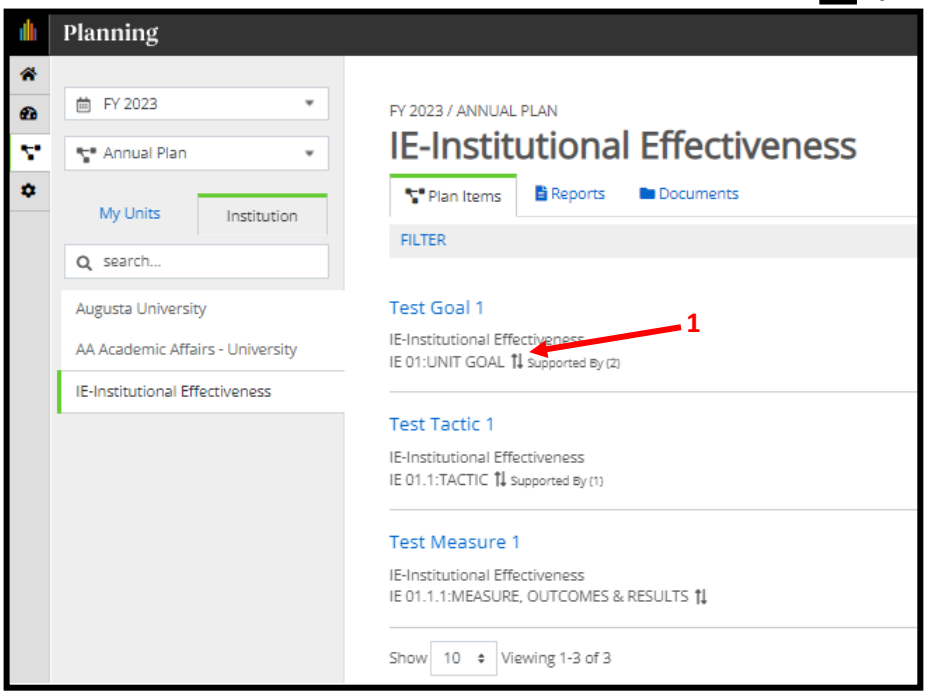


6) Scroll through the report options until you locate the "FY__ Unit Plan Mid-Year and Annual Report" you wish to generate. Click **View Report: 7/1/__ – 6/30/__**.
7) Reporting options will appear in the drop-down list. To generate a PDF version of the report, click **View Report**. To generate an Excel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

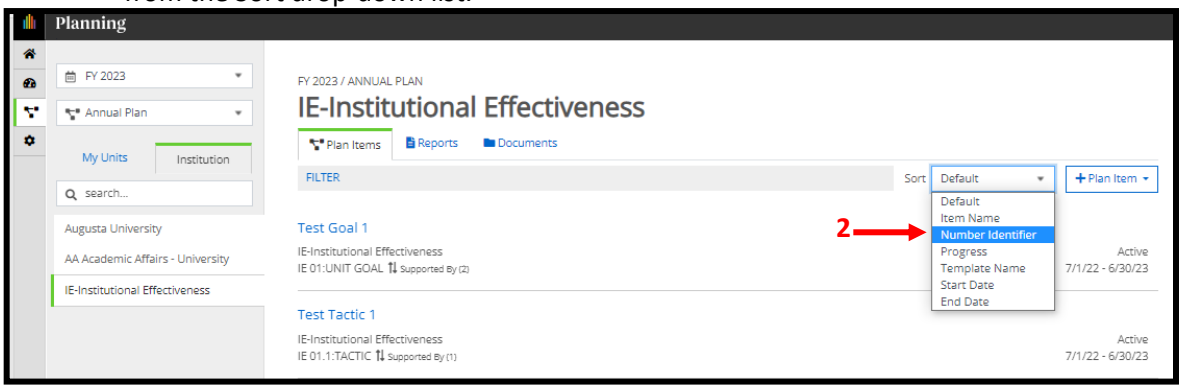
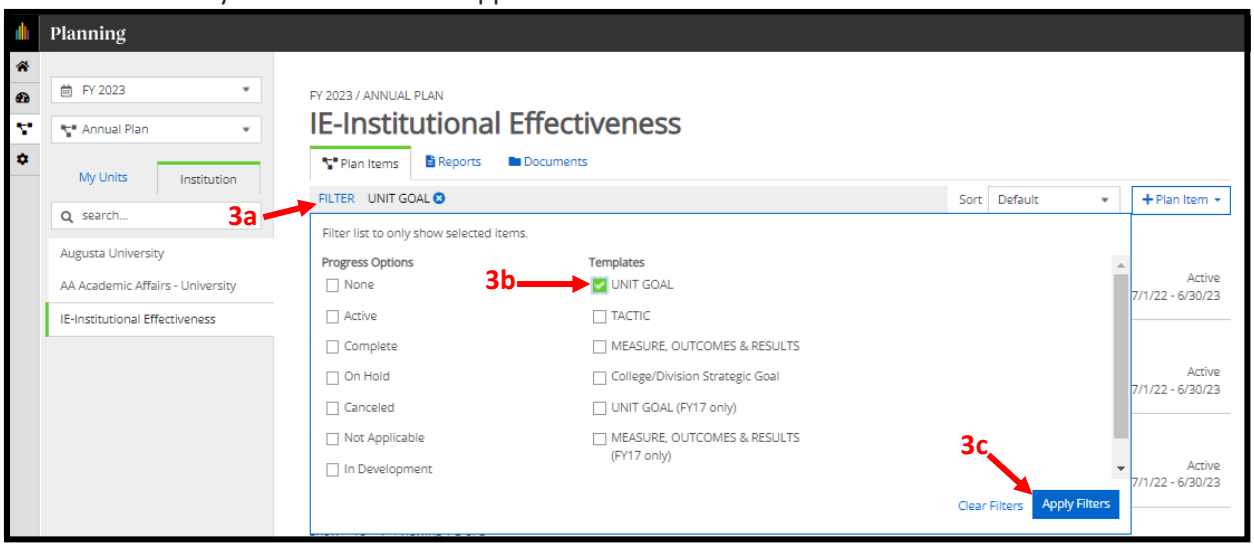
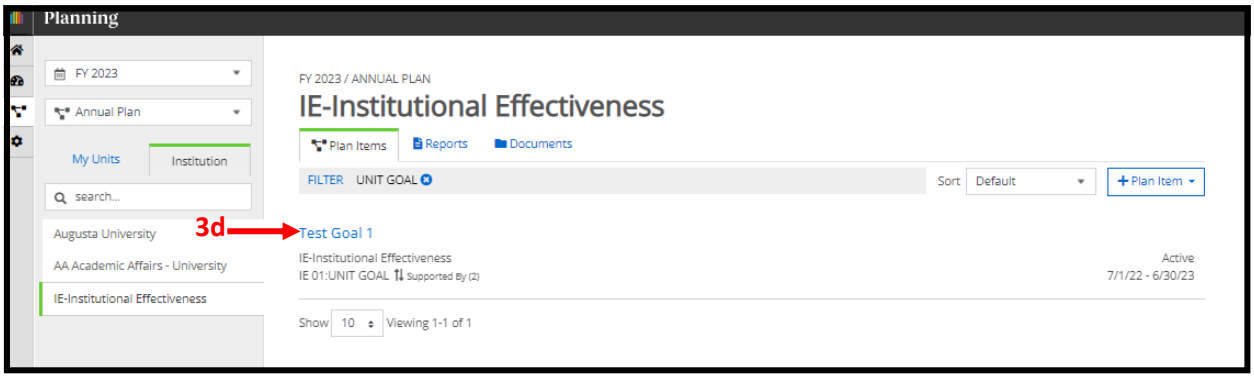
TIP: DO NOT click on the title of the report (Ex: "FY23 Unit Plan Mid-Year and Annual Report"). Clicking on the title enables administrators with report access in Campus Labs to alter the report.

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.