Quick Start Guide for OIRA-Planning (Outcomes)

*The Compliance Assist-Planning software used for the Assessment Plan and Report process has been upgraded with a new look and a new name, **OIRA-Planning**.*

Section 1: Access the website [https://UAH.campuslabs.com/planning.](https://UAH.campuslabs.com/planning)

1. Login with your ChargerID and password.
2. Select the **Dashboard** home icon **OR** the **Org Chart** graphic.

Section 2: Navigate the Dashboard to display items by level of access.

- Use one of the three primary tabs …
  - **My Items** tab shows items that you have created
  - **Responsible Items** shows items assigned to you as a Responsible User.
  - **Contributor** tab shows all items that you have access to.
- Click the **More** link at right to read the most recent Announcement.
- Use the **Page Numbers** at the bottom of the page to access more items.
- Use the **FILTER** option as needed. Check which items to include and click **Apply Filters**. *Leaving the tab removes any FILTER, Sort, or Page options.*

Section 3: Navigate the Org Chart to access items by program, or area.

1. Use the first drop-down box to set the appropriate **Academic Year**.
2. Set the second drop-down box to "**Assessment Plan**."
3. Click each level of the org chart on the left as needed for the desired unit.
4. Use the **Plan Items** tab to access Outcomes or Review Items for that unit. **OR** Use the **Reports** tab to view or print a report. (Section 7.)

Section 4: Edit an existing Outcome.

1. View the outcome you want to edit, either on the **Dashboard** (Section 2) or the **Org Chart** (Section 3). Click on the blue title to open the Outcome.
2. Use the scrollbar or Tab key to navigate to teach field and edit as needed. *Changes to an Outcome are saved immediately.*
   - **Outcome Number and Year of Implementation** is a 3-digit number underscore academic year outcome was first added (e.g. 001_15-16).
   - **SLO Major Area and Degree/Operational Outcome and Unit Name** is SLO or OPO underscore unit (e.g. SLO_Biology_BA).
   - **Progress** is "Ongoing." ("Completed" for an outcome no longer assessed.)
   - **Providing Department, Start Date,** and **End Date** should auto-populate.
3. Click **+File** on any field to upload a file (e.g. rubric, data report).
4. Click the blue **Done** button at the bottom of the outcome to exit.

Section 5: Relate an Outcome to the Strategic Plan.

1. Edit the outcome. (Section 4.)
2. Click the **Related** tab. Click the **+Supports** button.
3. Change the second drop-down to "Strategic Plan."
4. Click the blue **+** next to each appropriate item to select it.
5. Click the **Back to Plan Item** button when finished.

Section 6: Assign a Responsible User.

These items appear in the Responsible Items tab on the Dashboard.

1. Edit the outcome. (Section 4.)
2. Click the **Permissions** tab.
3. Start typing the user name in the **search box** under **Available Users**.
4. Click the select the appropriate user from the list displayed.

Section 7: View or print a Report.

1. Navigate to the appropriate **Org Chart** unit. (Section 3.)
2. Click the **Reports** tab. Click the **View Report** link under **Full Assessment Plan Report.** Click the **View Report** option to display it as a webpage.
   - Use the **Print** option to print a hard copy of the report or to print to pdf.
   - Copy and paste the report text into another software (i.e. Word).

Section 8: Add a new Outcome.

1. Navigate to the appropriate **Org Chart** unit. (Section 3.)
2. Check the **Academic Year** setting to ensure it is set for the correct year.
3. Click on the **Plan Items** tab. Click on the **+ Plan Item** link on the right.
4. Click in each field to edit it. See Section 4 for more information.
5. Click the blue **Done** button at the bottom of the outcome to exit.

Section 9: Delete an Outcome.

This action cannot be undone.

1. Edit the outcome. (Section 4.) Verify that it is for the appropriate academic year. *Deleting an outcome affects that Academic Year only.*
2. Use the **scrollbar** at right to scroll to the bottom of the screen.
3. Click the **Delete** option on the far left. Click the blue **Confirm** button.

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Quick Start Guide for OIRA-Planning (Review Items)

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Section 1: Access the website https://UAH.campuslabs.com/planning.

1. Login with your ChargerID and password.
2. Select the **Dashboard** home icon **OR** the **Org Chart** graphic.

Section 2: Navigate the Dashboard to display items by level of access.

- Use one of the three primary tabs …
  - **My Items** tab shows items that you have created
  - **Responsible Items** shows items assigned to you as a Responsible User.
  - **Contributor** tab shows all items that you have access to.
- Click the **More** link at right to read the most recent Announcement.
- Use the **Page Numbers** at the bottom of the page to access more items.
- Use the **FILTER** option as needed. Check which items to include and click **Apply Filters**. *Leaving the tab removes any FILTER, Sort, or Page options.*

Section 3: Navigate the Org Chart to access items by program, or area.

1. Use the first drop-down box to set the appropriate **Academic Year**.
2. Set the second drop-down box to "**Assessment Plan**."
3. Click each level of the org chart on the left as needed for the desired unit.
4. Use the **Plan Items** tab to access Outcomes or Review Items for that unit. **OR** Use the **Reports** tab to view or print a report. (Section 4.)

Section 4: View or print a Report.

1. Navigate to the appropriate **Org Chart** unit. (Section 3.)
2. Click the **Reports** tab to display the tabs of reports available for that unit. *The default reporting dates show below each report name.*
   - The **Full Assessment Plan Report** includes all Outcomes for the unit.
   - The **Review Items Report** includes all Review Items for the unit.
3. Click the **View Report** link under the appropriate report to display the report options. Click the **View Report** option to display it as a webpage.
   - Use the **Print** option to print a hard copy of the report or to print to pdf.
   - Copy and paste the report text into another software (i.e. Word).
   - Click the **Customize Dates** option to view a different reporting year. Change just year in the **Start Date** and **Edit Date** and then click the blue **View Report** button again to open the new customized report.
4. Close the browser tab to exit the report.

Section 5: Complete a Review Item.

1. Ensure that you have access to the outcomes being reviewed, either in hardcopy or by viewing a report. (Section 4.)
2. Navigate to the appropriate **Org Chart** unit. (Section 3.)
3. Check the **Academic Year** setting to ensure it is set for the correct year (usually the previous academic year).
4. Set the second drop-down box to "**Assessment Plan**."
5. Click on the **Plan Items** tab. Click on the **+ Plan Item** link on the right.
6. Use the scrollbar or Tab key to navigate to teach field and edit as needed. *Changes to a Review Item are saved immediately.*
   - Enter the **Outcome Number and Year of Implementation** as the word "Review_" followed by the outcome number and your name.
   - Enter the **Outcome** as the word "Review_" followed by the actual wording of the outcome.
   - Click the dropdown menu next to each item and choose the appropriate response, "Evident" or "Not Evident."
   - Click in each Comment field to type directly in it or copy/paste from an existing document. Include, at minimum, a comment for any criteria marked "Not Evident" and any other comments as needed.
   - Change the **Progress** field to "Completed" when all fields are filled in.
7. Click the blue **Done** button at the bottom of the page to exit or when the review item is complete.
8. Use the **Read View** button to view the review item as it will appear in a report.

A <u>Review Student Learning Outcome</u> needs to be completed for each Student Learning Outcome (SLO)

A <u>Review Operational Outcome</u> needs to be completed for each Operational Outcome (OPO).

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