



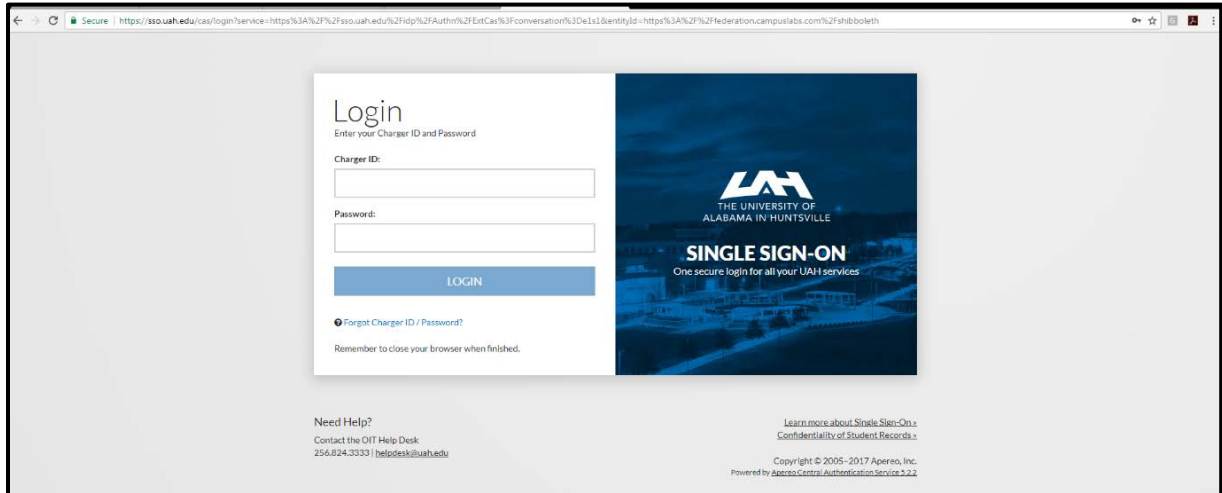
User Guide for OIRA-Planning

*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**.*


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Section 1: Accessing the website


1. Type "UAH.CampusLabs.com/Planning" into the address window in your internet browser. The Single-Sign-On Screen will appear.

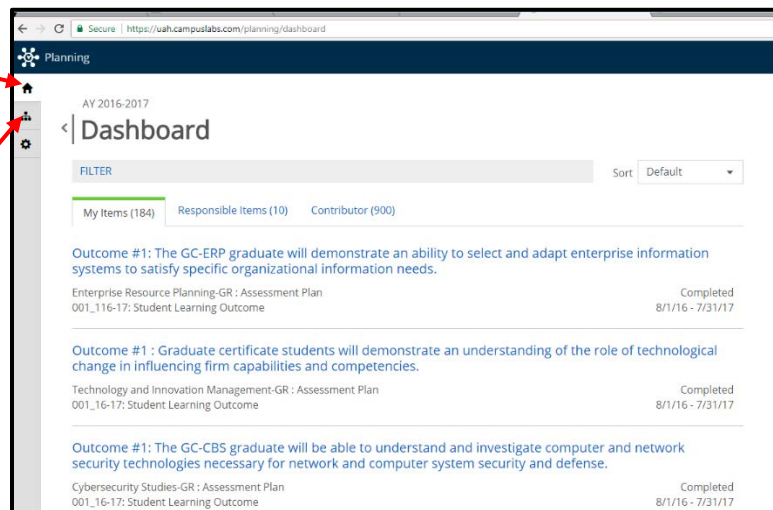


2. Log in with your UAH ChargerID and Password.

3. Select the  **Dashboard** home icon to display items by level of access for the current year.


OR

Select the  **Org Chart** graphic to access items by degree, program, or area.

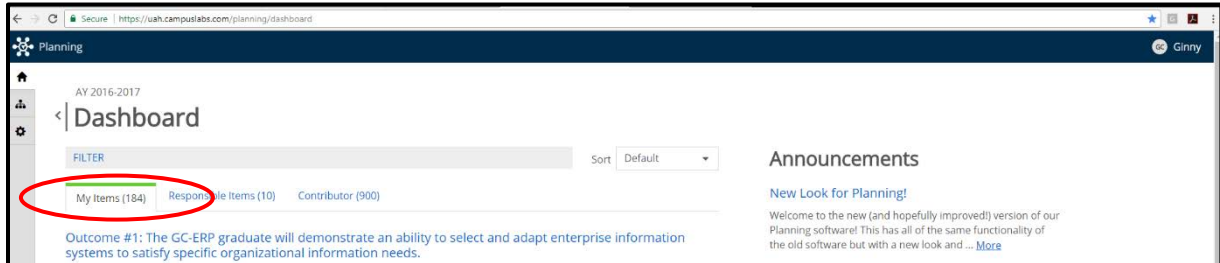


Alternate Step 1&2: Enter the URL <https://UAH.CampusLabs.com/Planning> directly in your internet browser.

Section 2: Navigating the Dashboard

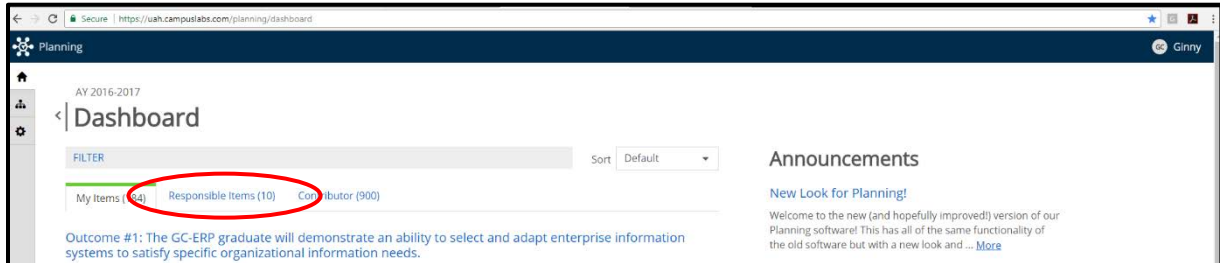
The **Dashboard**  displays items by level of access for the current reporting year.

1. Click the **My Items** tab to access items that you have created



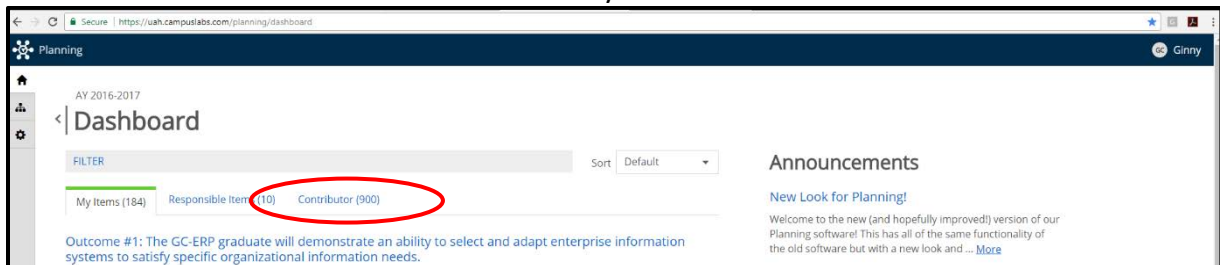
OR

Click the **Responsible Items** tab to access items that you are responsible to complete.



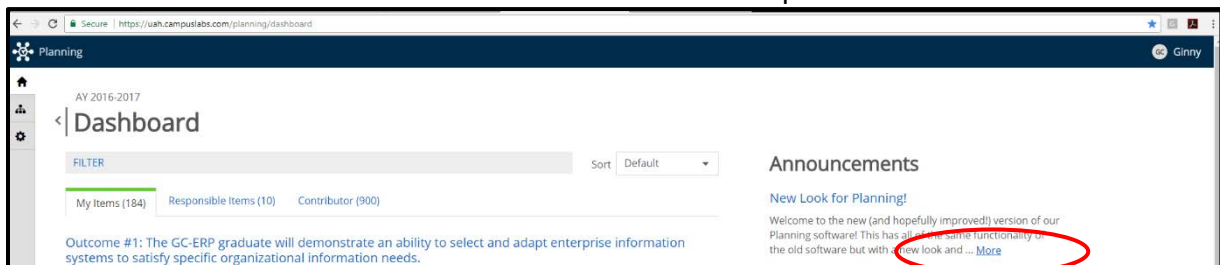
OR

Click the **Contributor** tab to access items that you have access to.

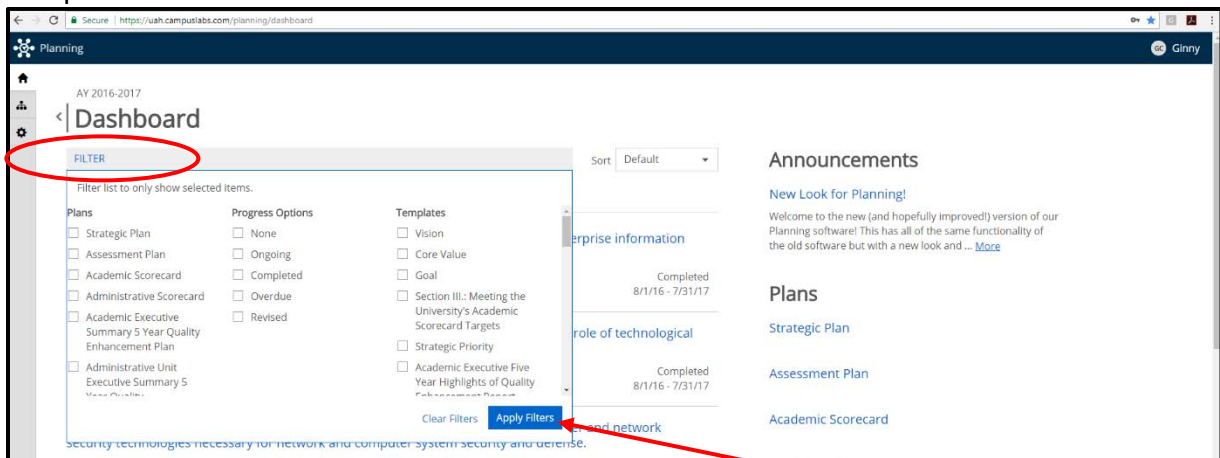


OR

Click the **More** link to read the most recent Announcement posted for the website.

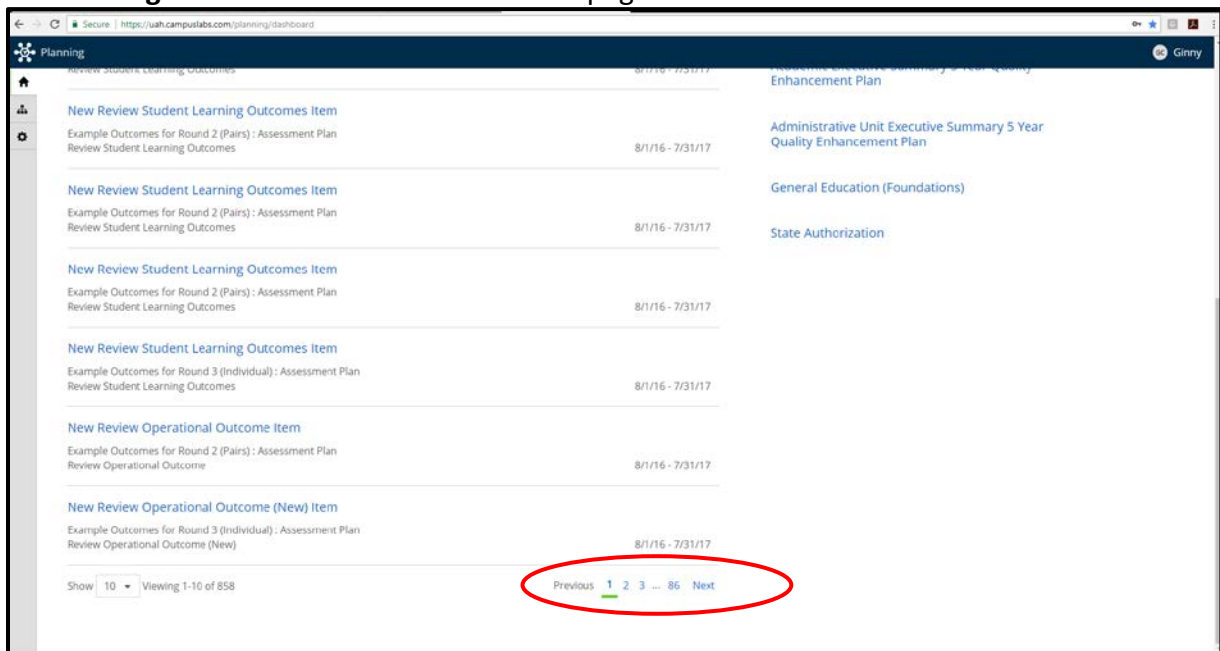


- Use the **FILTER** option on any of the tabs to filter for items by Plans, Progress Options, or Templates.




Indicate which items should be included and then click the Apply Filters button.

- Use the **Page Numbers** at the bottom of the page to access more items.

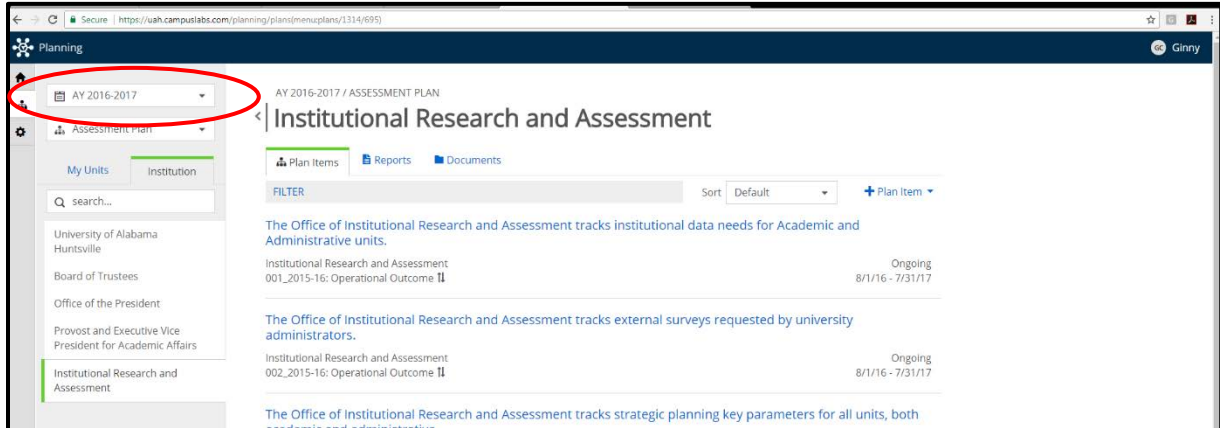


Note: Navigating off the tab will remove any FILTER, Sort, or Page options selected

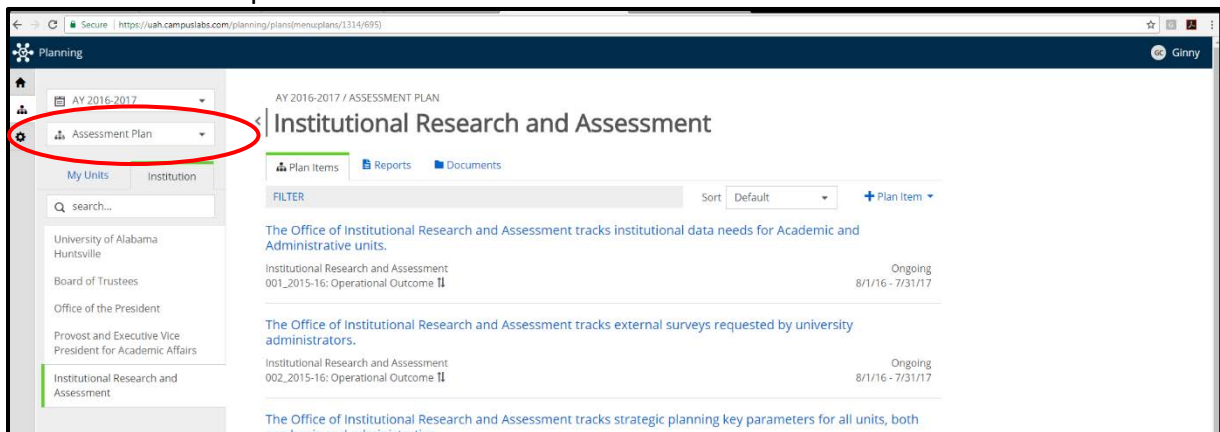
Section 3: Navigating the Org Chart

The **Org Chart**  displays items by degree, program, or area based on VP & College structure.

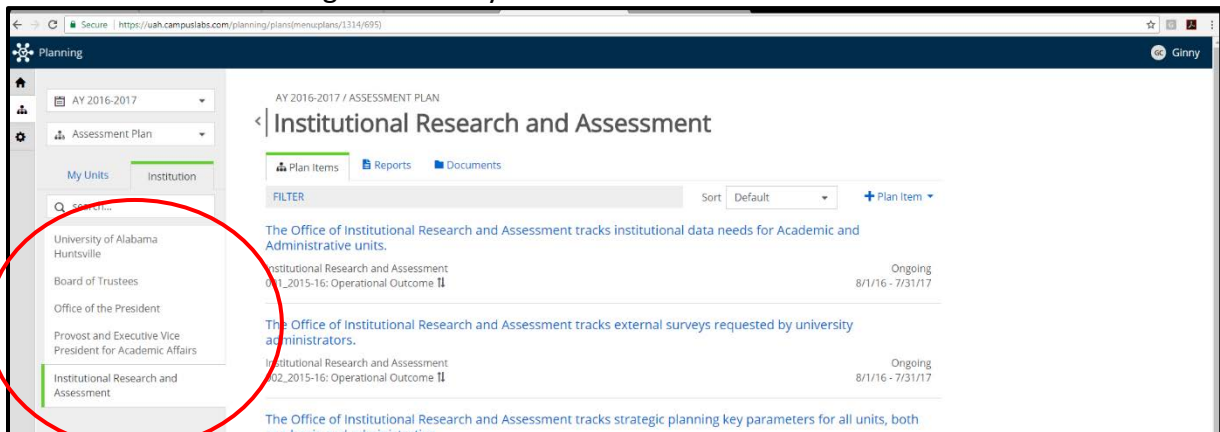
1. Use the first drop-down box to set the appropriate **Academic Year**.



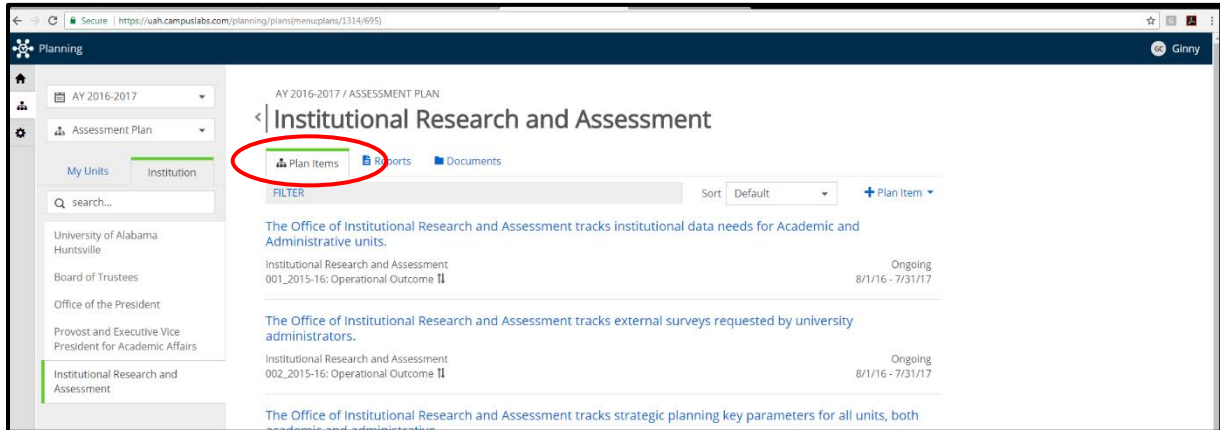
2. Set the second drop-down box to “**Assessment Plan.**”



4. Click each level of the org chart until you reach the desired unit.

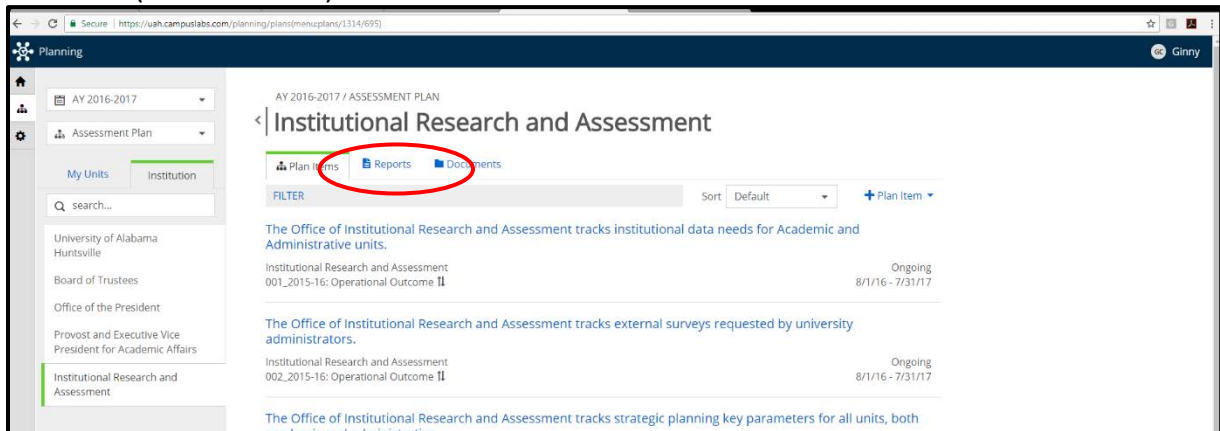


4. Use the **Plan Items** tab to access Outcomes or Review Items for that unit.



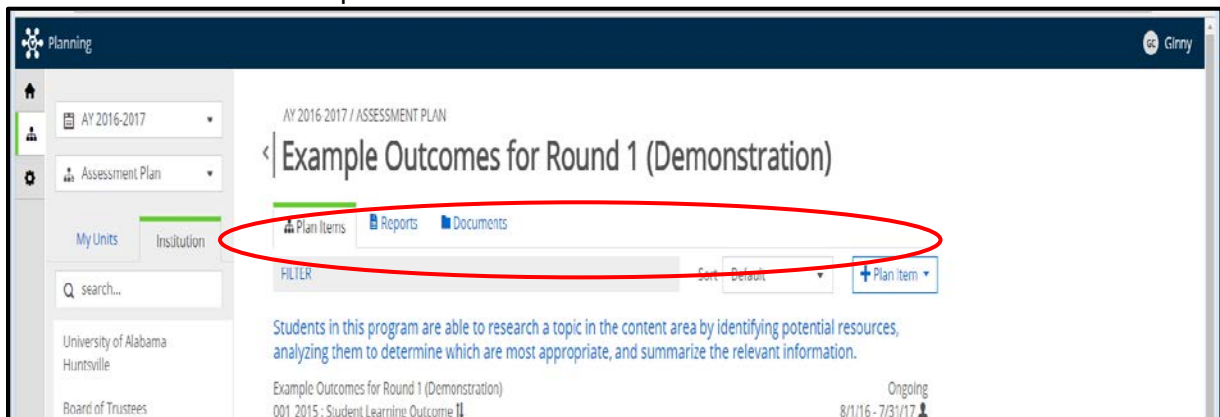
OR

Use the **Reports** tab to view or print a report with all of the Outcomes or Review Items for that unit. (See Section 8.)

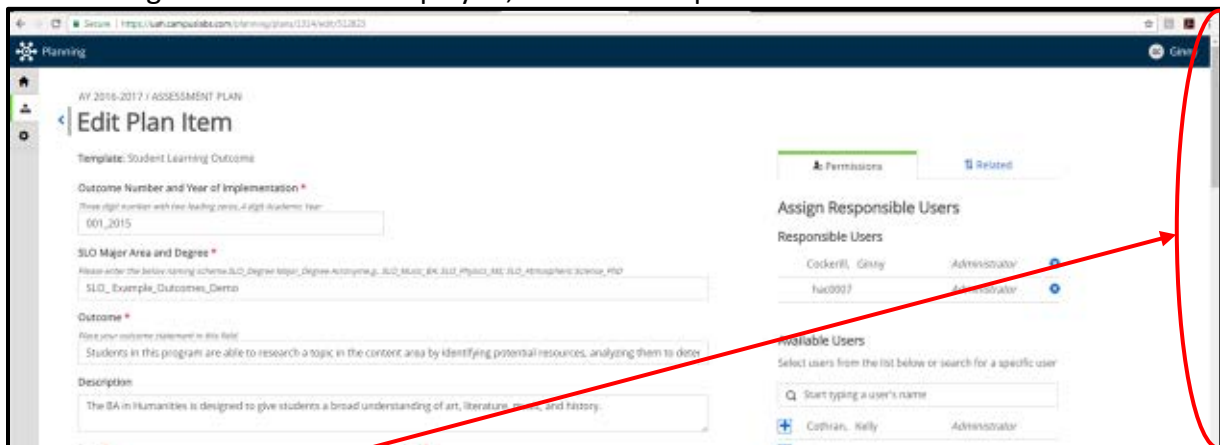


Section 4: Editing an existing Outcome

1. Navigate so that you can see the Outcome you want to edit in the list, either on the **Dashboard** (Section 2) or the **Org Chart** (Section 3).
2. Click on the blue title to open the Outcome.



The existing outcome is now displayed, with fillable spaces or textboxes for each item.



3. Use the scrollbar at right to navigate to the next component of the template. Or use the Tab key to move from one field to the next.
4. Click in each field to type directly in it or copy/paste from an existing document.
Note: Changes to an outcome are saved immediately. Textboxes include an Undo option but there is no cancel or undo option for the outcome as a whole.

Reminders

- **Outcome Number and Year of Implementation** is a three digit number (e.g. 001, 002, etc.) with an underscore (e.g. _) and then the academic year (e.g. 15-16) the outcome was first added.
- **SLO Major Area and Degree** (for SLOs) is outcome type (SLO) with an underscore (e.g. _) followed by the unit (e.g. OIRA or Biology_BA). An additional underscore and short name for the outcome can be added if desired.
- **Operational Outcome and Unit Name** (for OPOs) is the outcome type (OPO) with an underscore (e.g. _) followed by the unit (e.g. OIRA or Biology_BA). An additional underscore and short name for the outcome can be added if desired.
- **Outcome** is the actual outcome statement. (This field is limited to 255 characters.)
- **Start Date** is August 1 of the current academic year.
- **End Date** is July 31 of the current academic year.
- **Progress** reflects the current status of the outcome and so should usually be “Ongoing.” If a unit decides to discontinue an outcome, then it should be changed to “Completed.”
- **Does This Outcome Relate to Any of the Following?** (for SLOs) is optional and indicates if an outcomes meets an special categories.

5. *Optional: Relate the Outcome to the Strategic Plan. (See Section 5.)*
6. *Optional: Upload supporting files such as rubrics, surveys, or data reports. (See Section 6.)*
7. *Optional: Assign a Responsible User. (See Section 7.)*
8. Click the blue **Done** button at the bottom of the outcome to exit or when changes are complete.



9. Use the **Read View** button to view the outcome as it will appear in a report.

Section 5: Relating an Outcome to the Strategic Plan

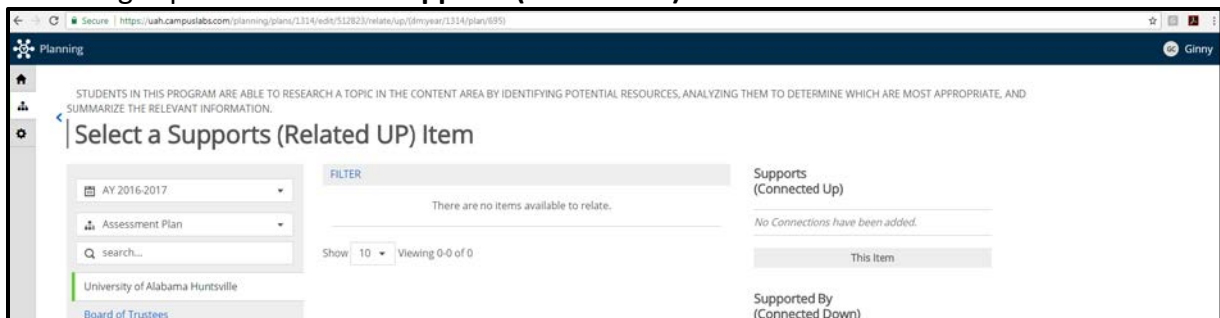
1. Log on to OIRA-Planning and edit the appropriate outcome. (See Section 4.)
2. Click the **Related** tab.



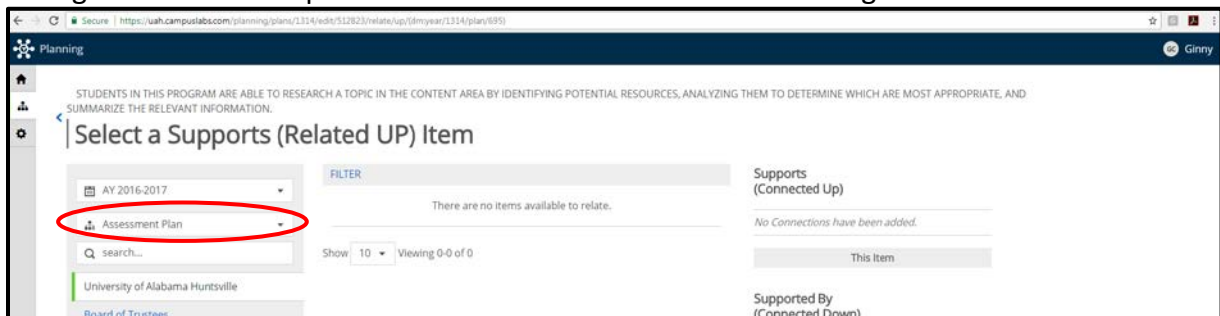
3. Click the **+Supports** button.



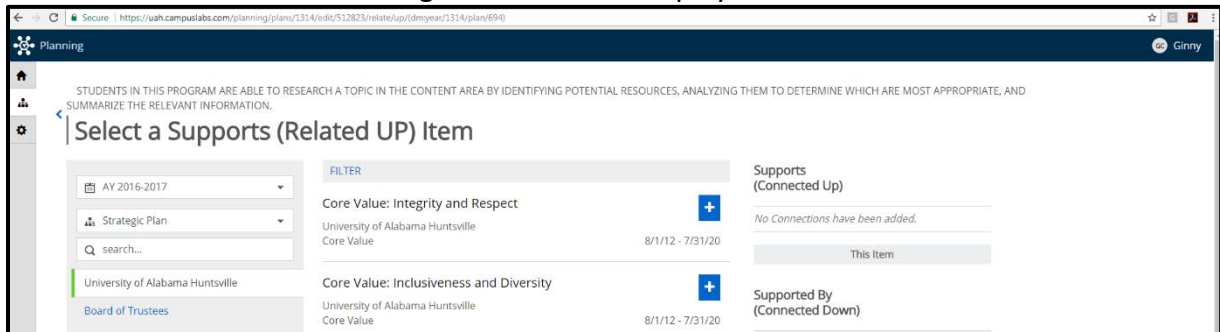
This brings up a new **Select a Supports (Related UP) Item** window.



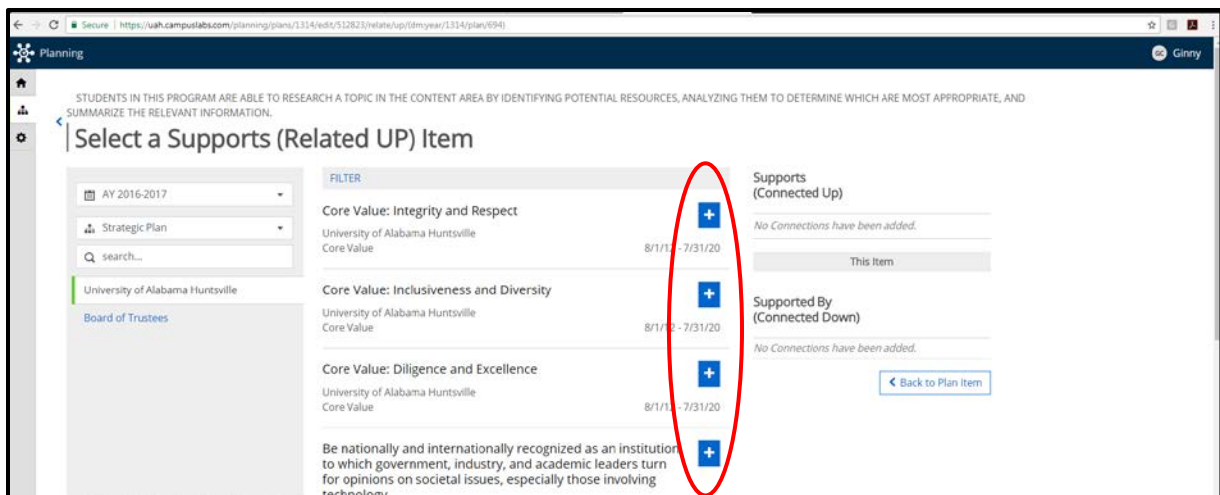
4. Change the second drop-down from "Assessment Plan" to "Strategic Plan."



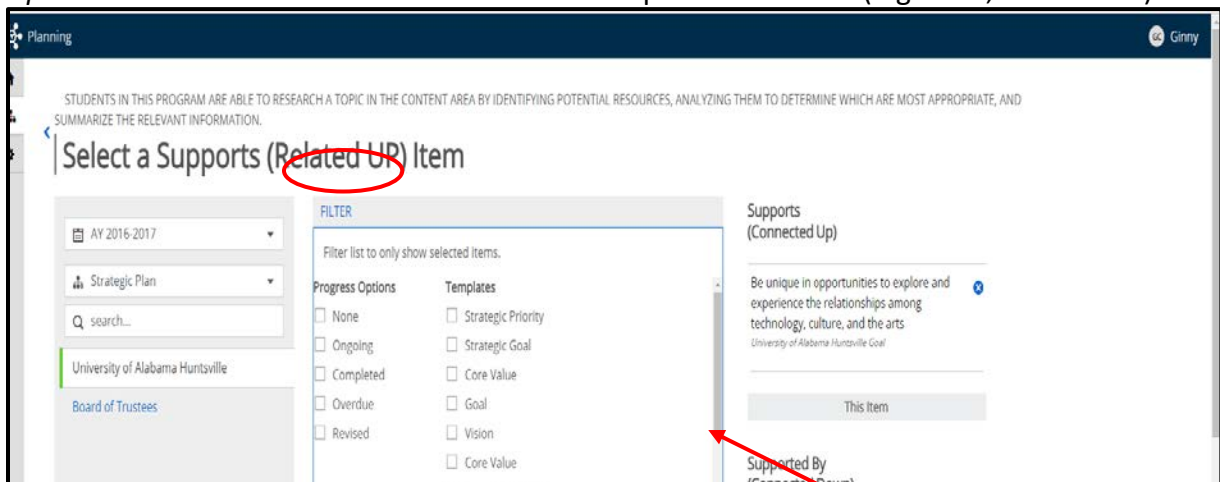
The elements of the UAH Strategic Plan are now displayed.



5. Click the blue + next to an item to select it.



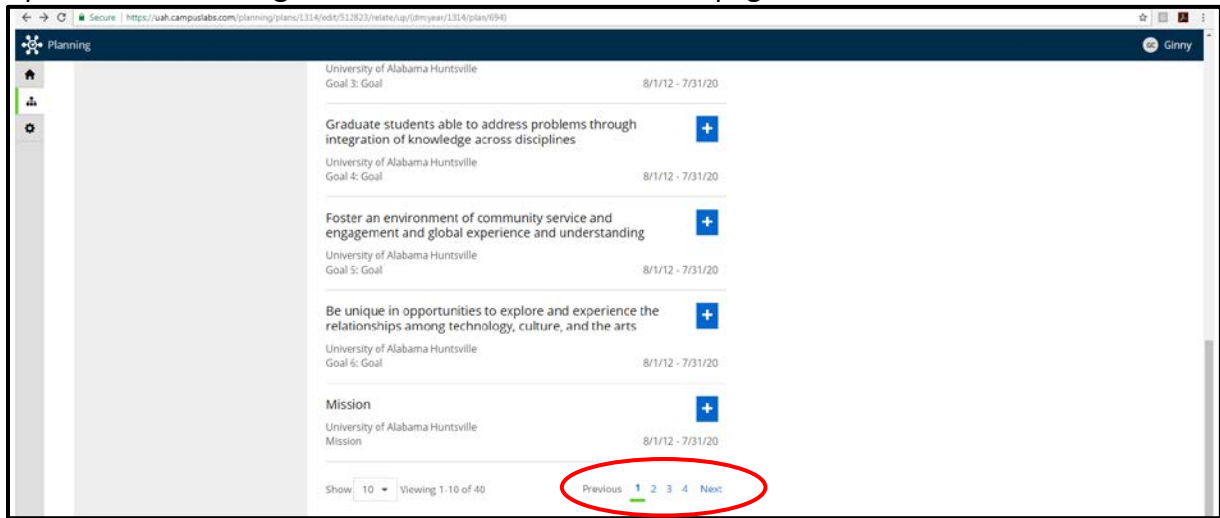
6. *Optional:* Use the **FILTER** button to filter for the specific elements (e.g. Goal, Core Value).



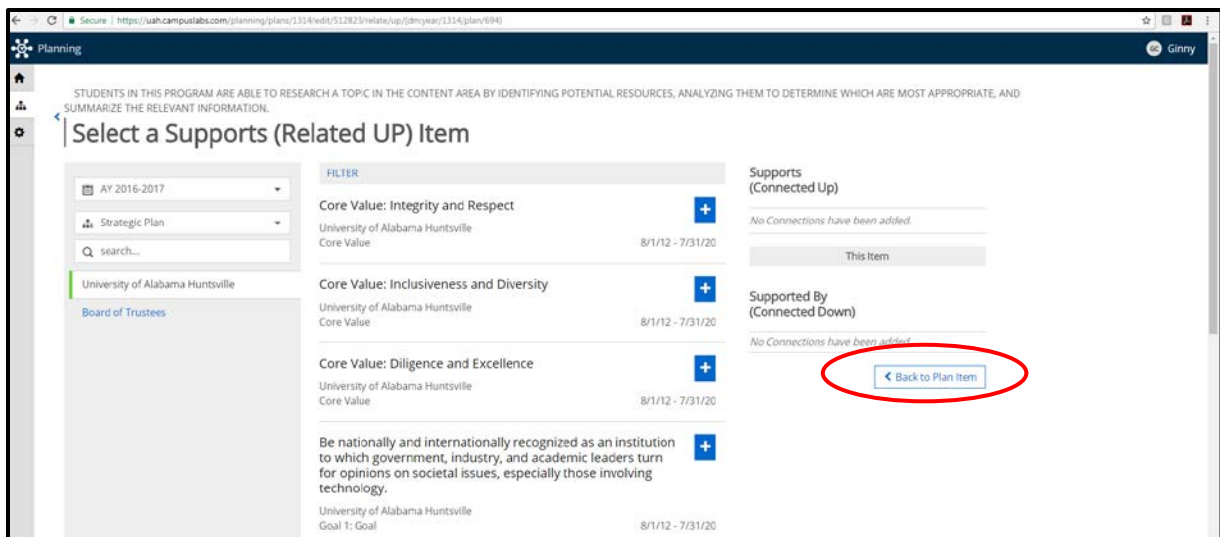
Indicate which items should be included and then click the **Apply Filters** button.

Note: Navigating off the tab will remove any FILTER, Sort, or Page options selected.

10. *Optional:* Use the **Page Numbers** at the bottom of the page to access more items.

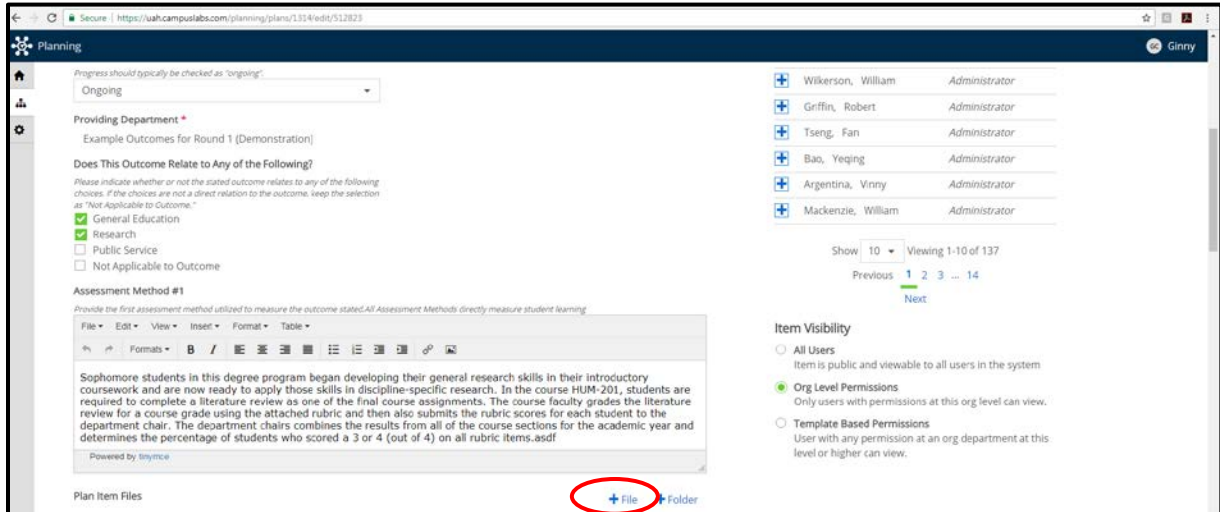


11. Click the **Back to Plan Item** button when finished.

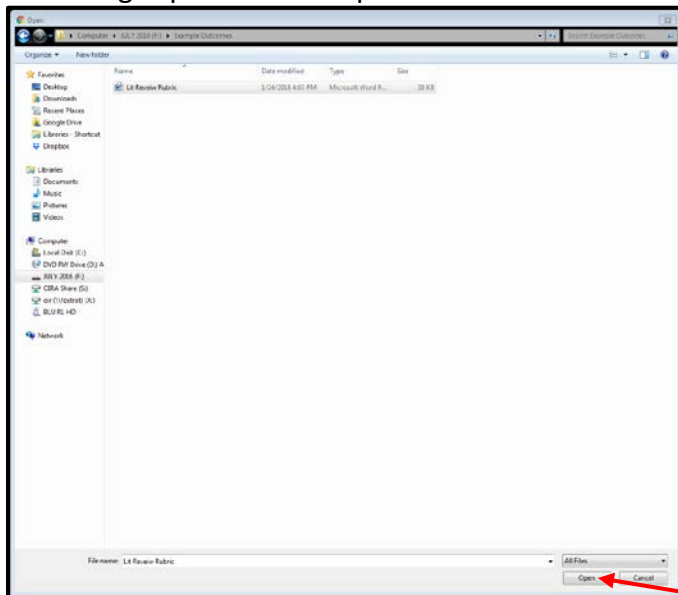


Section 6: Uploading a file

1. Log on to OIRA-Planning and edit the appropriate outcome. (See Section 4.)
2. Navigate to the appropriate template element and click the **+File** link.

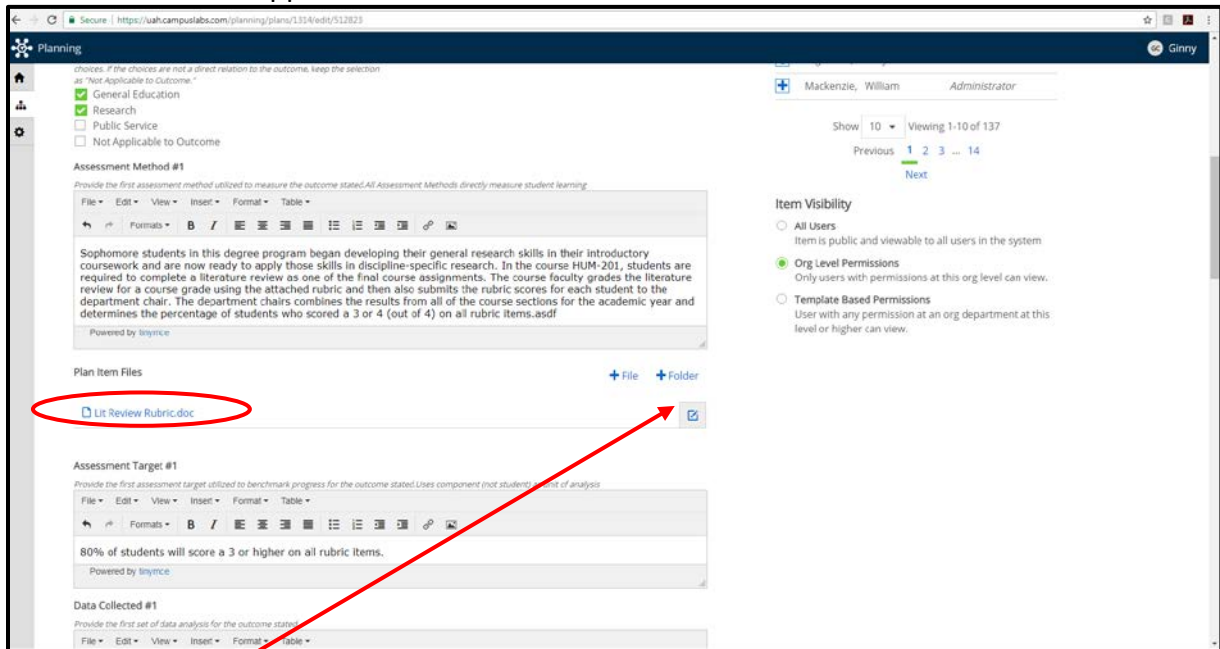


This brings up a new file explorer window.



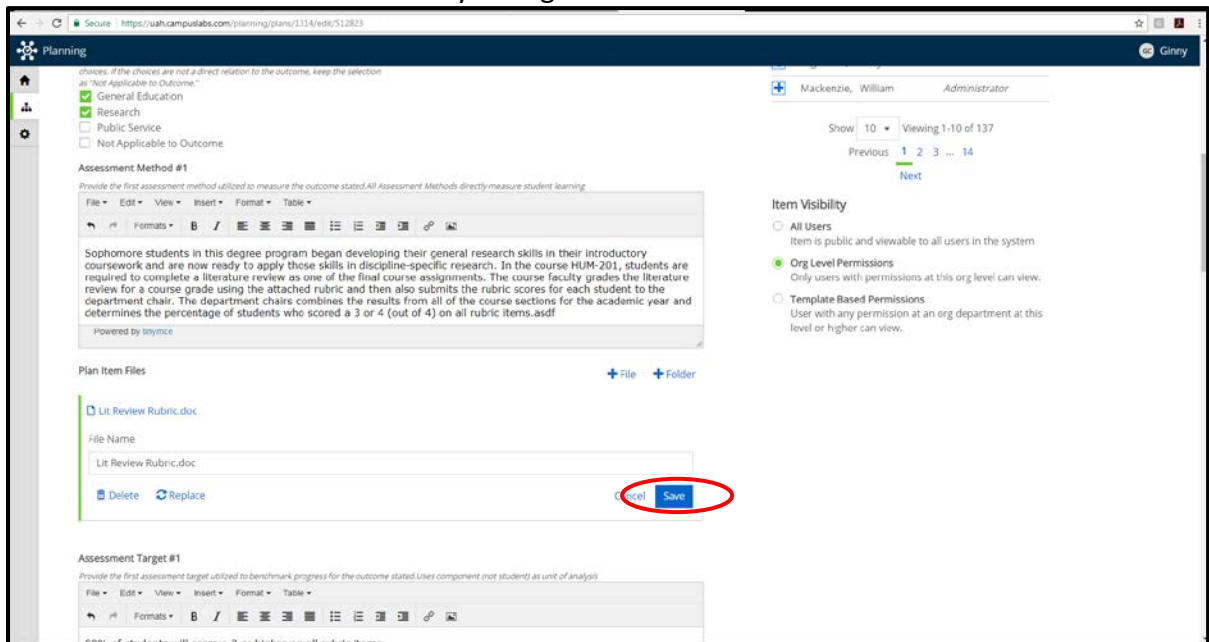
3. Locate the appropriate file on your computer, select the file, and then click the **Open** button.

The file name now appears as a blue link.



4. Click the **Edit** icon to rename, replace, or delete the file.

5. Click the blue **Save** button after any changes.

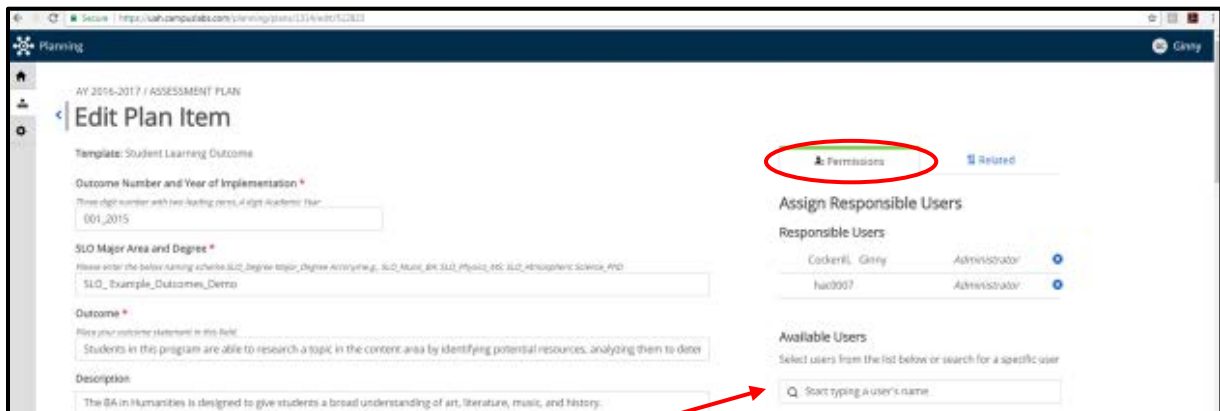


6. Repeat as needed until all files are uploaded.

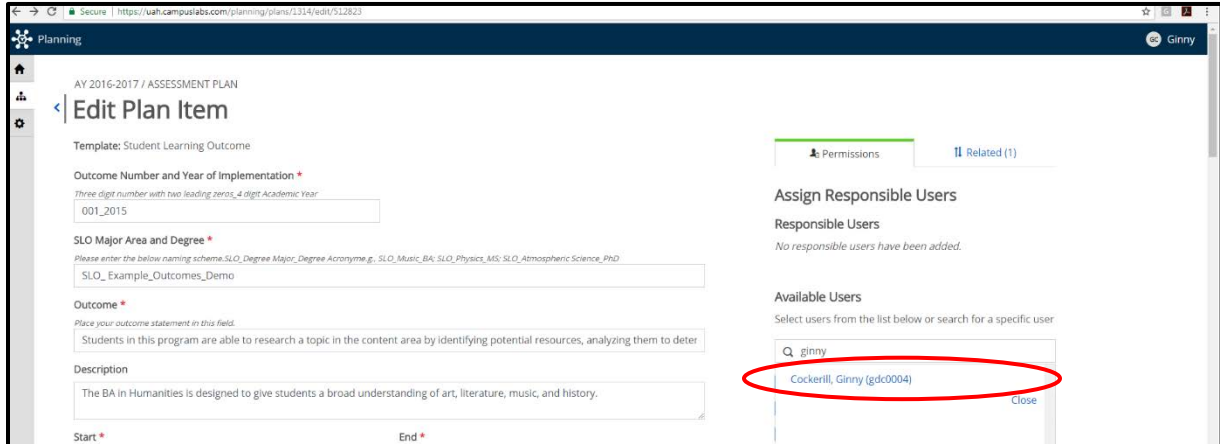
Section 7: Assigning a Responsible User

Items assigned this way display for that user in the Responsible Items tab on the Dashboard.

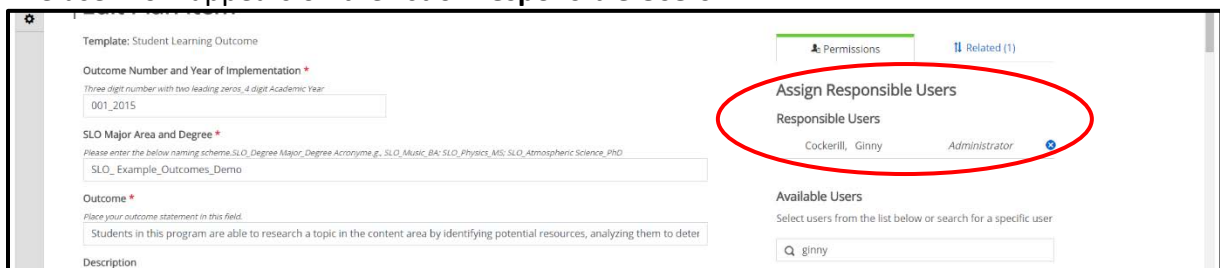
1. Log on to OIRA-Planning and edit the appropriate outcome. (See Section 4.)
2. Click the **Permissions** tab.




3. Start typing the user name in the **search box** under **Available Users**.
4. Click the select the appropriate user from the list displayed.

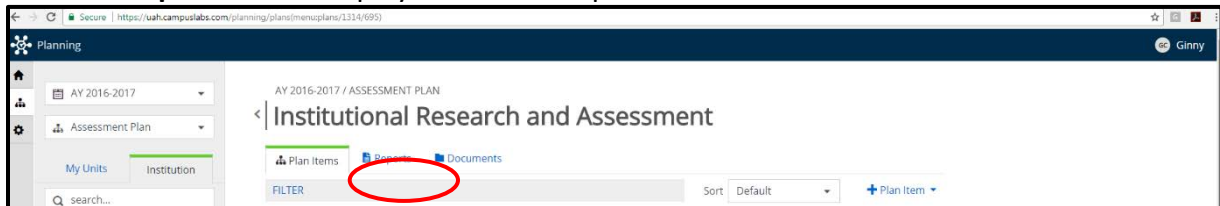


The user now appears on the list of **Responsible Users**.

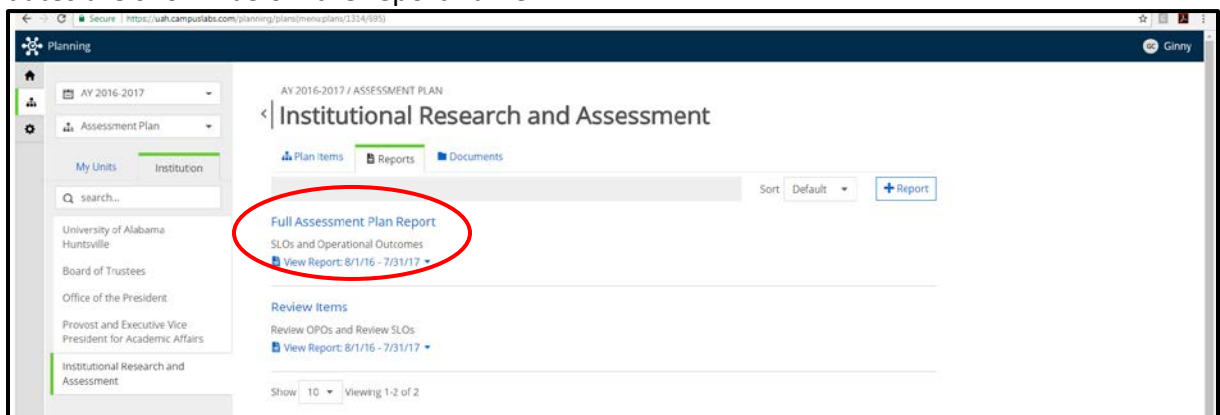


Section 8: Viewing or printing a Report

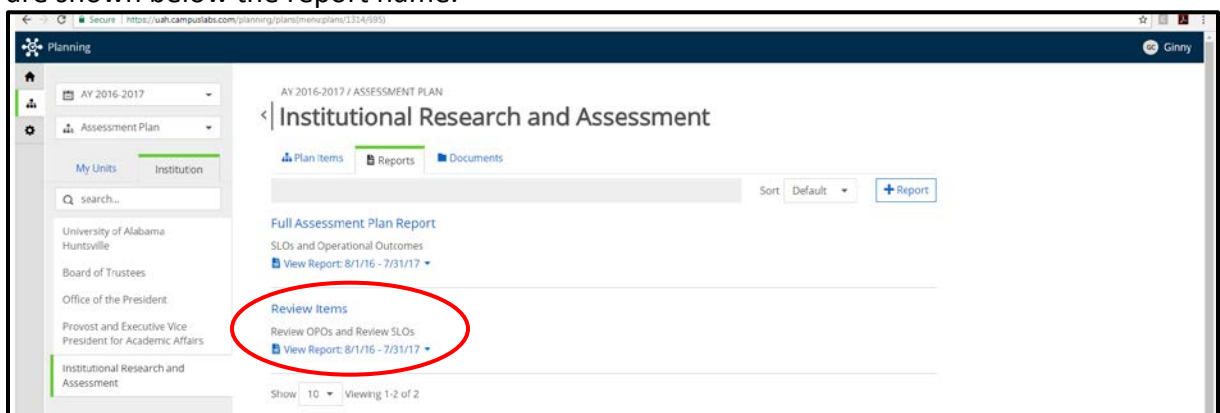
1. Log on to OIRA-Planning and access the appropriate **Org Chart**  unit. (See Section 3.)
2. Click the **Reports** tab to display the tabs of reports available for that unit.



The **Full Assessment Plan Report** includes all Outcomes for the unit. The default reporting dates are shown below the report name.

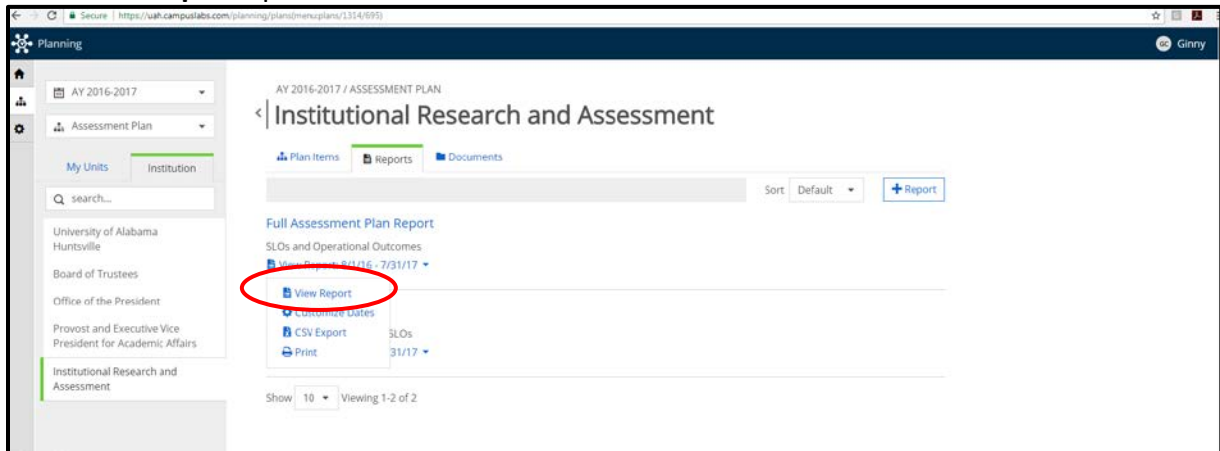


The **Review Items Report** includes all Review Items for the unit. The default reporting dates are shown below the report name.

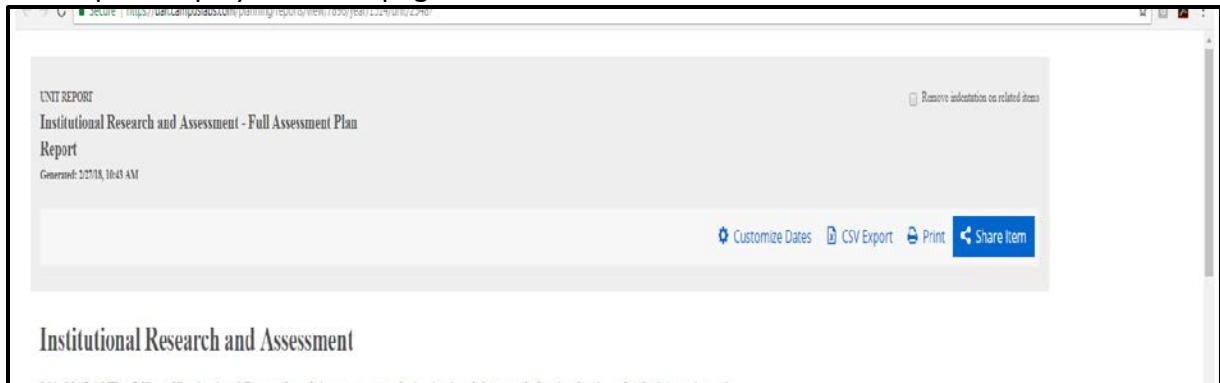


3. Click the **View Report** link under the appropriate report to display the report options.

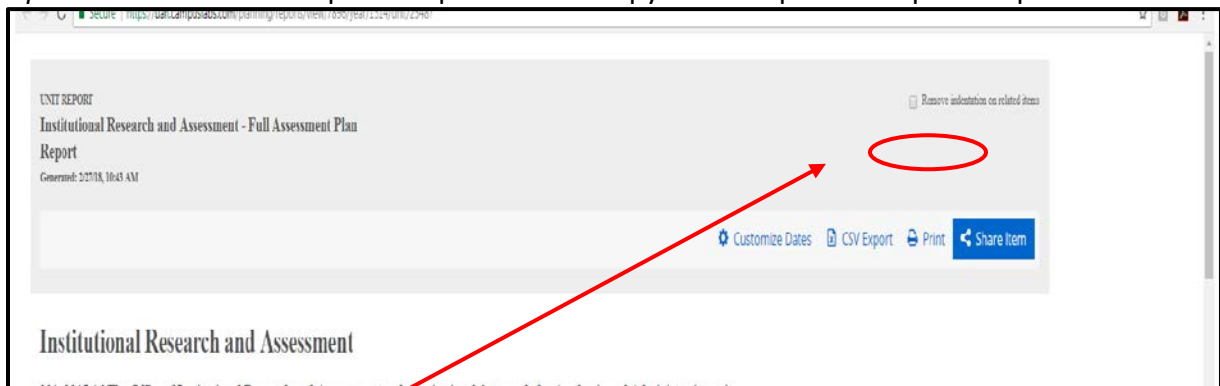
4. Click **View Report** option.



The Report displays as a webpage in a new tab.



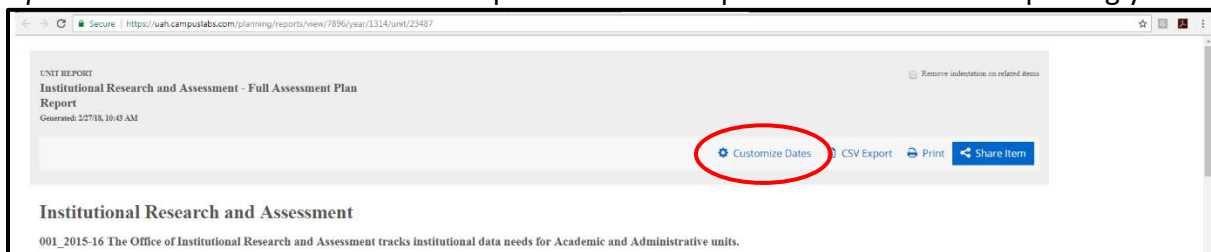
5. *Optional:* Use the Print option to print a hard copy of the report or to print to pdf.



6. *Optional:* Use the CSV Export option to view the report in as an Excel file.

7. *Optional:* Copy and paste the report text into Word document or other software if needed.

8. *Optional:* Click the Customize Dates option to view a report from a different reporting year.



This displays the **Custom Report Date Range** window.

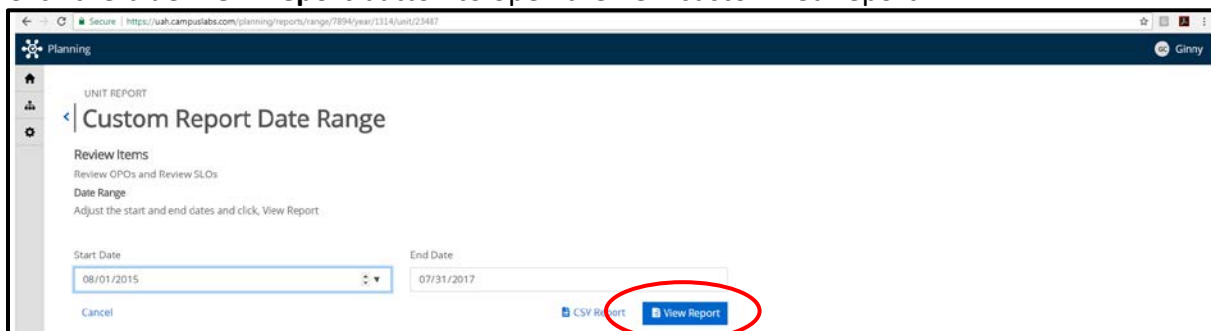


Click to the **year** in the **Start Date**




Click either the **up or down arrow** to select the appropriate year. Repeat for the **End Date**.

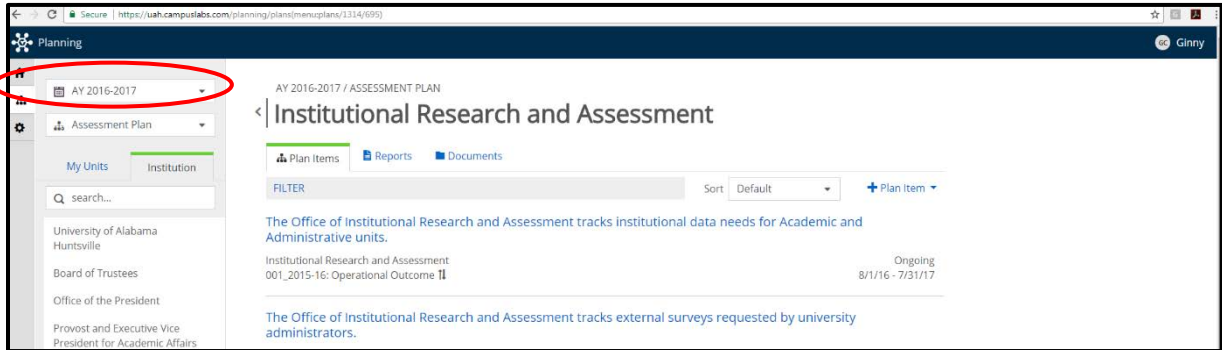
Click the blue **View Report** button to open the new customized report.



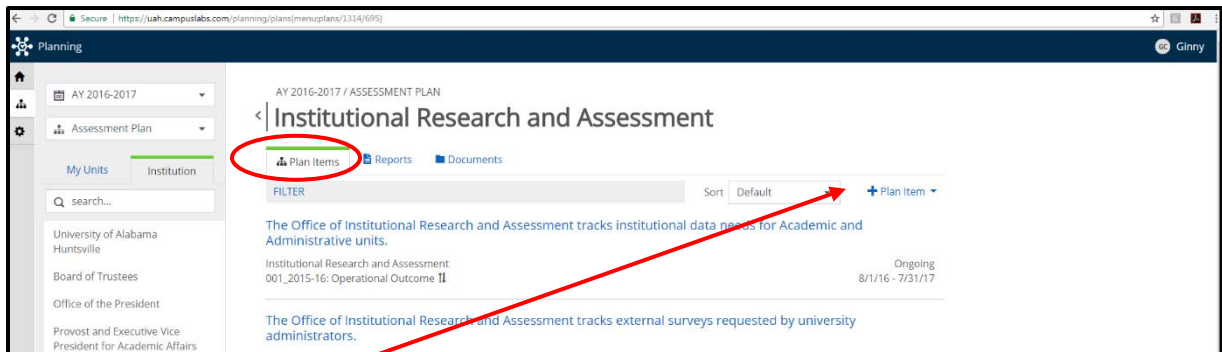
9. Close the tab to exit the report.

Section 9: Adding a new Outcome

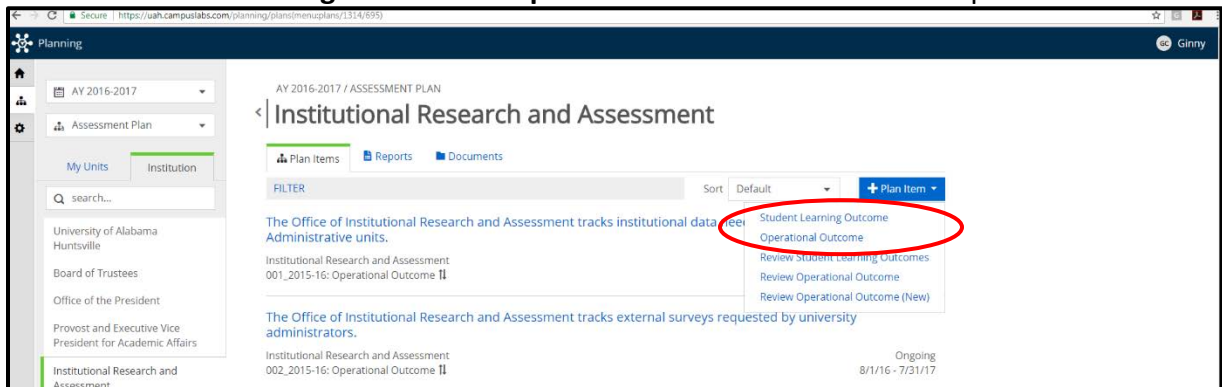
1. Log on to OIRA-Planning and access the appropriate **Org Chart**  unit. (See Section 3.)
2. Check the **Academic Year** setting to ensure it is set for the correct year.



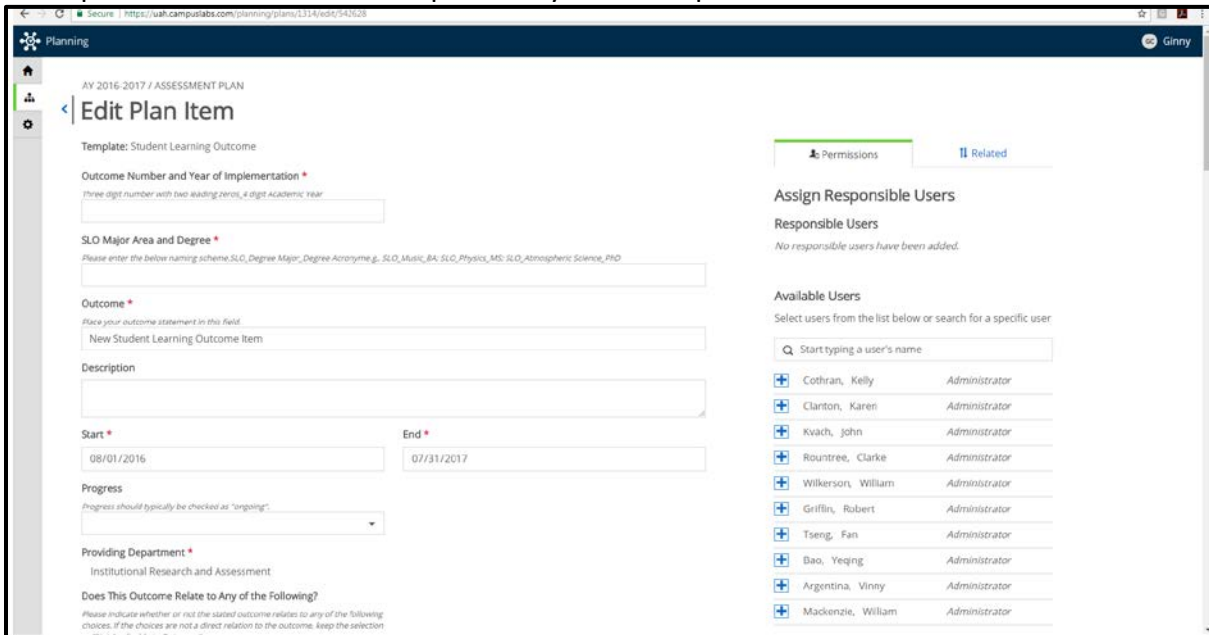
3. Click on the **Plan Items** tab.



4. Click on the **+ Plan Item** link on the right.
5. Choose **Student Learning Outcome** or **Operational Outcome** from the drop-down list.



This opens a blank Outcome template for you to complete.



The screenshot shows the 'Edit Plan Item' form for a 'Student Learning Outcome'. The form includes the following fields and sections:

- Template:** Student Learning Outcome
- Outcome Number and Year of Implementation ***: A text box with a placeholder 'Three digit number with two leading zeros, 4 digit Academic year'.
- SLO Major Area and Degree ***: A text box with a placeholder 'Please enter the below naming scheme: SLO_Degree Major_Degree Acronym e.g. SLO_Music_BA; SLO_Physics_MS; SLO_Atmospheric Science_PhD'.
- Outcome ***: A text box with a placeholder 'Place your outcome statement in this field' and the text 'New Student Learning Outcome Item'.
- Description**: A large text area.
- Start ***: A date field with the value '08/01/2016'.
- End ***: A date field with the value '07/31/2017'.
- Progress**: A dropdown menu with the value 'Progress should typically be checked as "ongoing"'. Below it is a dropdown arrow.
- Providing Department ***: A text box with the value 'Institutional Research and Assessment'.
- Does This Outcome Relate to Any of the Following?**: A section with a note: 'Please indicate whether or not the stated outcome relates to any of the following choices. If the choices are not a direct relation to the outcome, keep the selection'.
- Permissions** and **Related** tabs.
- Assign Responsible Users**: A section with the text 'No responsible users have been added'.
- Available Users**: A list of users with a search bar. The list includes:

Name	Role
Cothran, Kelly	Administrator
Clanton, Karen	Administrator
Kvach, John	Administrator
Rountree, Clarke	Administrator
Wilkerson, William	Administrator
Griffin, Robert	Administrator
Tseng, Fan	Administrator
Bao, Yeqing	Administrator
Argentina, Vinny	Administrator
Mackenzie, William	Administrator

Note: Changes to an outcome are saved immediately. Textboxes include an Undo option but there is no cancel or undo option for the outcome as a whole.

- Enter the **Outcome Number and Year of Implementation** as a three digit number (e.g. 001, 002, etc.) with an underscore (e.g. _) and then the academic year (e.g. 15-16) the outcome was first added.
- For SLOs, enter the **SLO Major Area and Degree** as the outcome type (SLO) with an underscore (e.g. _) followed by the unit (e.g. OIRA or Biology_BA).
For OPOs, enter the **Operational Outcome and Unit Name** as the outcome type (OPO) with an underscore (e.g. _) followed by the unit (e.g. OIRA or Biology_BA).
An additional underscore and short name for the outcome can be added if desired.
- Enter the **Outcome** as the actual outcome statement or title. (This field is limited to 255 characters.)
- Confirm that the **Start Date** and **End Date** have auto-populated correctly.
The **Start Date** is August 1 of the current academic year.
The **End Date** is July 31 of the current academic year.
- Click the drop-down arrow for the **Progress** field to select the "Ongoing" option.
Use the "Completed" option only if a unit decides to discontinue an outcome.
- For SLOs, complete the **Does This Outcome Relate to Any of the Following?** field if the outcome meet any of the special categories.



12. Use the **scrollbar** at right to navigate to the next component of the template. Or use the Tab key to move from one field to the next.

13. Click in each field to type directly in it or copy/paste from an existing document.

12. *Optional*: Relate the Outcome to the Strategic Plan. (See Section 5.)

13. *Optional*: Upload supporting files such as rubrics, surveys, or data reports. (See Section 6.)

14. *Optional*: Assign a Responsible User. (See Section 7.)

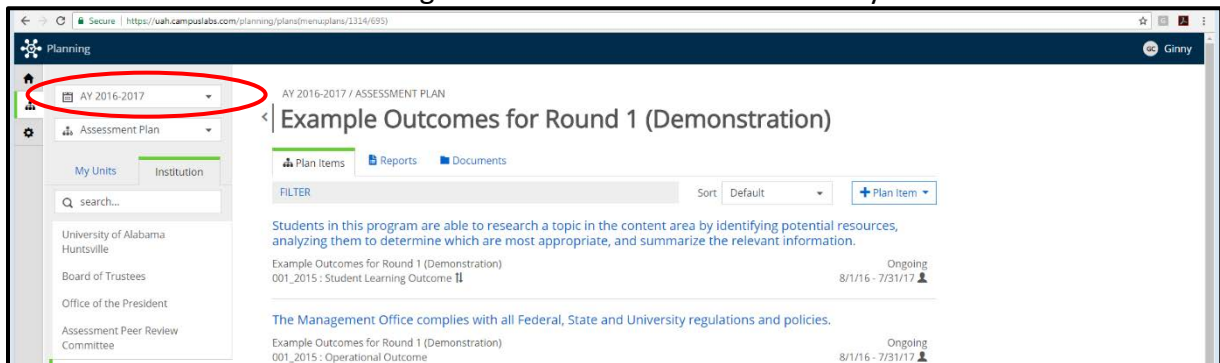
14. Click the blue **Done** button at the bottom of the outcome to exit or when all changes are complete.

15. Use the **Read View** button to view the outcome as it will appear in a report.

Section 10: Deleting an Outcome

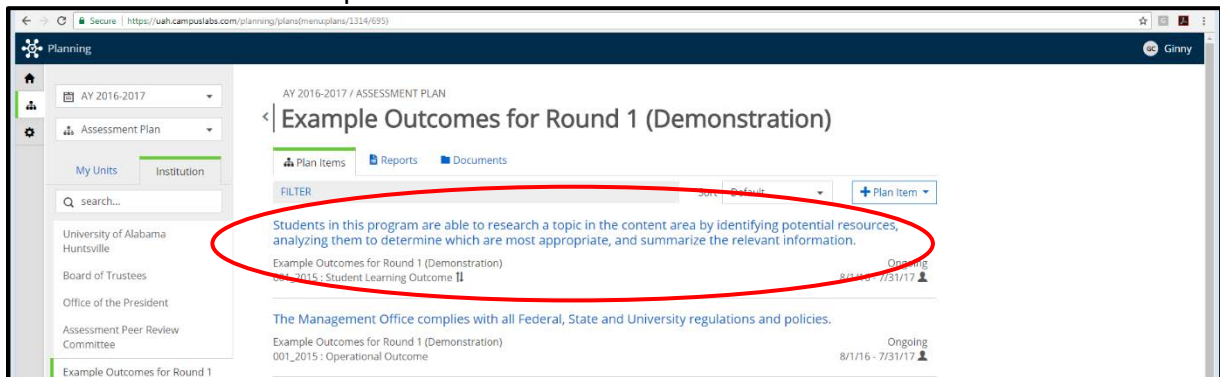
This action cannot be undone. Once an outcome is deleted, it cannot be restored.

1. Navigate so that you can see the Outcome you want to edit in the list, either on the Dashboard (Section 2) or the Org Chart (Section 3).
2. Check the **Academic Year** setting to ensure it is set for the correct year.

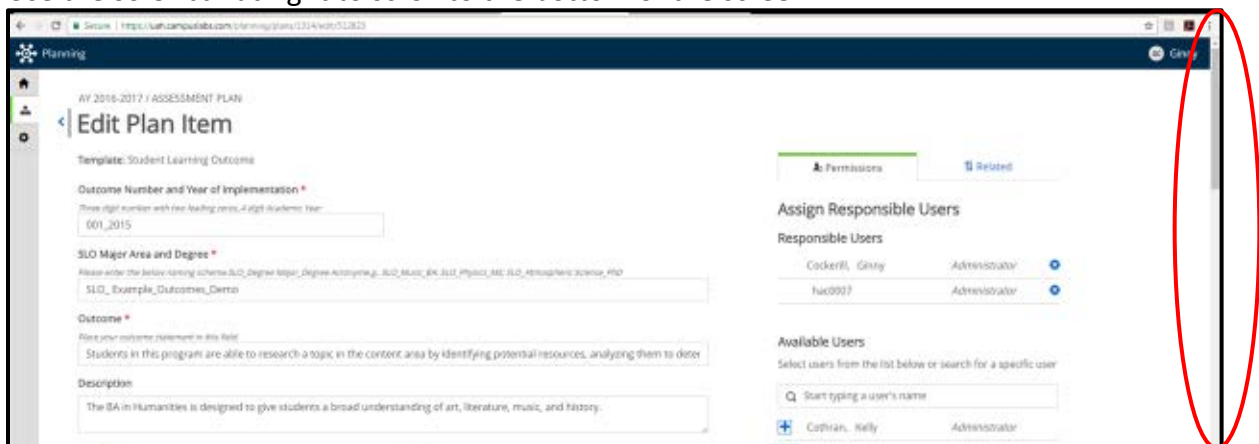


Note: Deleting an outcome removes it from the current Academic Year only.

3. Click on the **blue title** to open the Outcome.

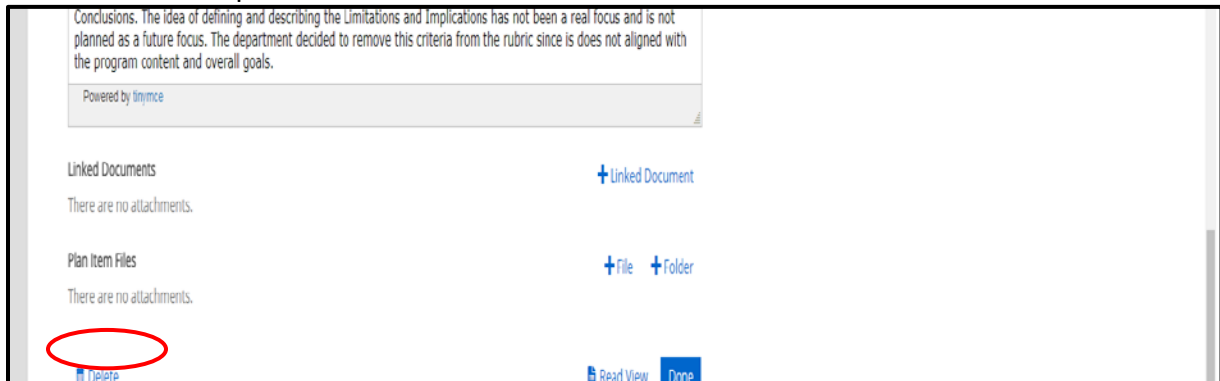


4. Use the **scrollbar** at right to scroll to the bottom of the screen.

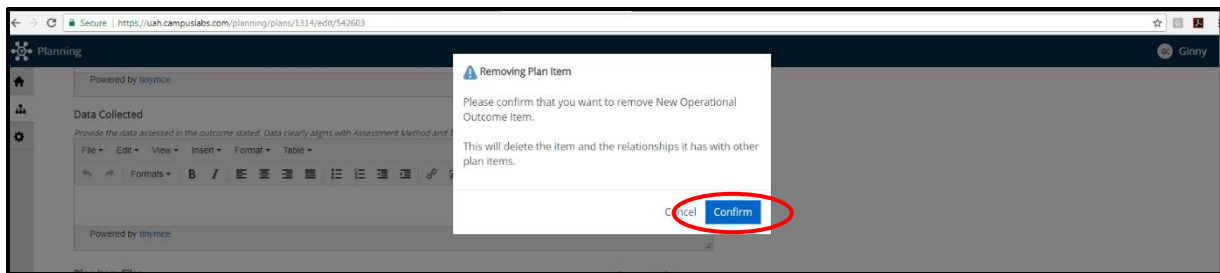





- Click the **Delete** option on the far left.

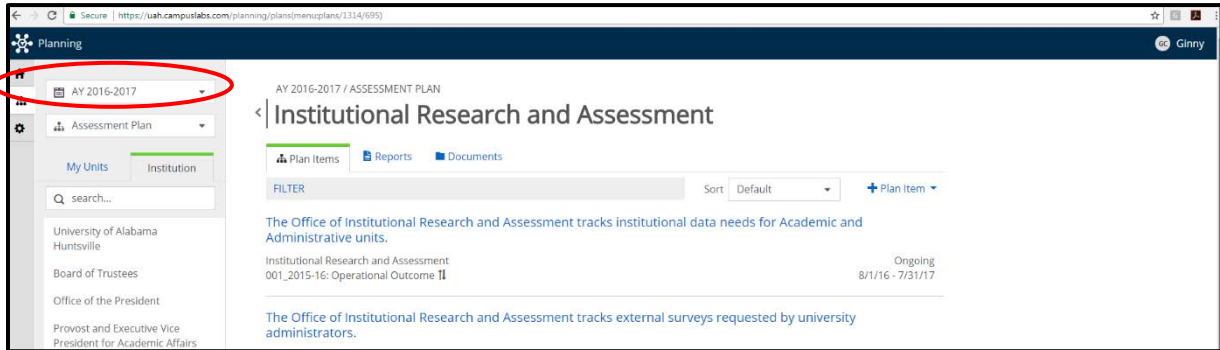


- Click the blue **Confirm** button to delete the outcome.

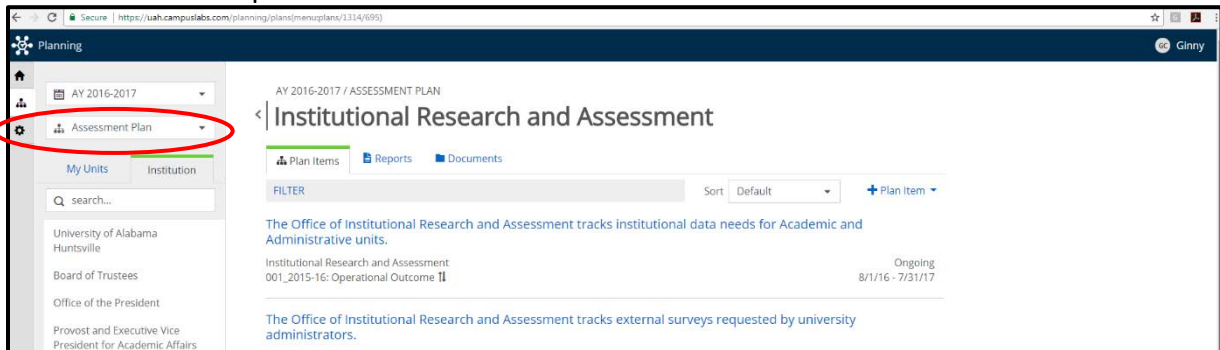


Section 11: Completing a Review Item

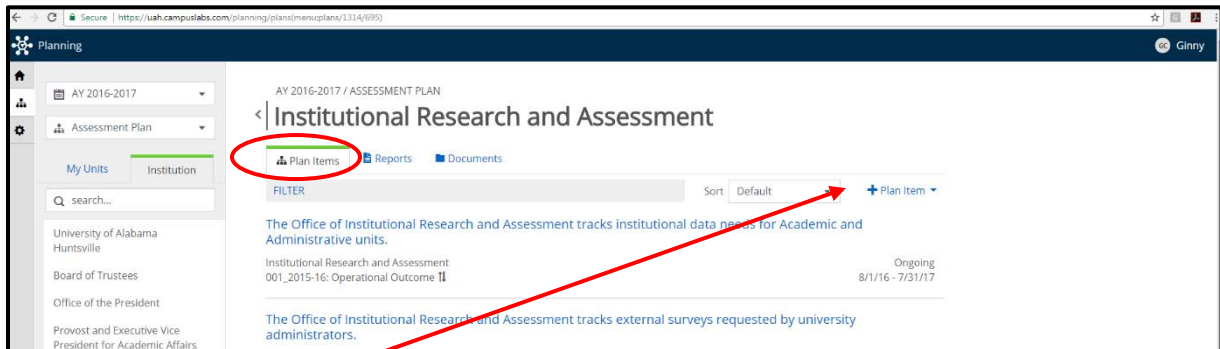
1. Ensure that you have access to the outcomes being reviewed, either in hardcopy or by viewing a report. (See Section 8.)
2. Log on to OIRA-Planning and access the appropriate **Org Chart**  unit. (See Section 3.)
3. Check the **Academic Year** setting to ensure it is set for the correct year.



4. Check the next drop-down to ensure it is set for **Assessment Plan**.

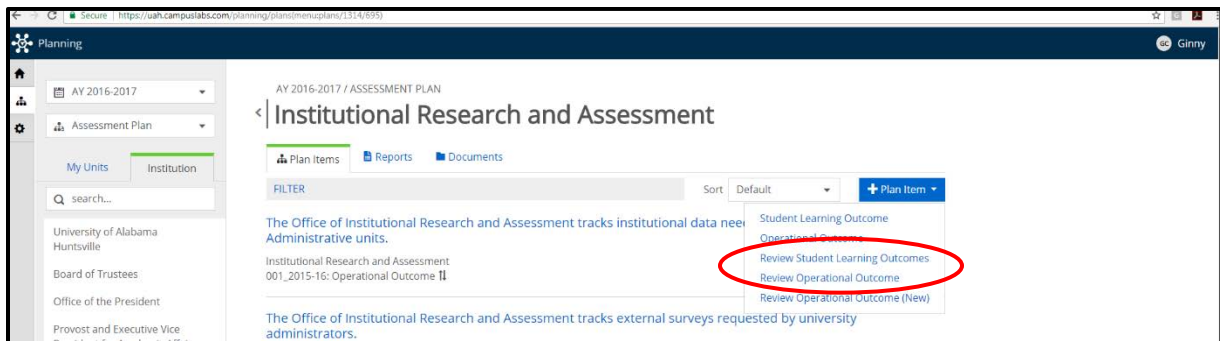


5. Click on the **Plan Items** tab.

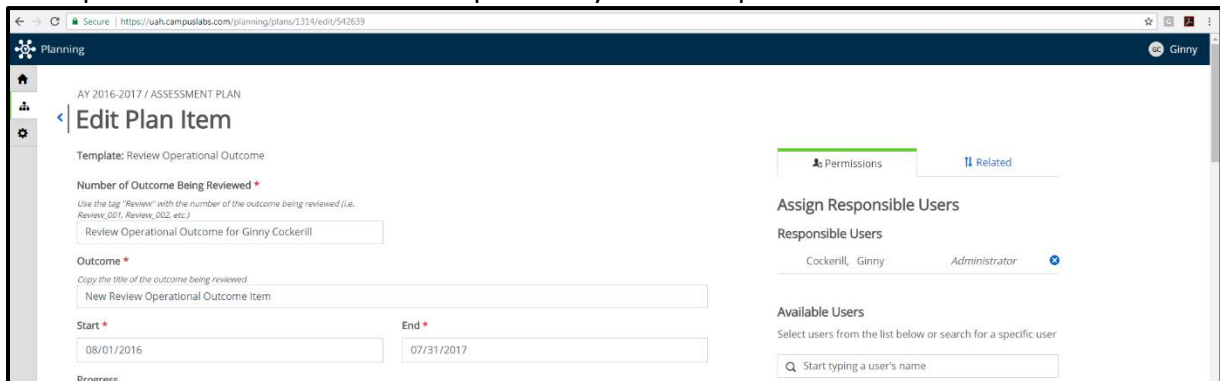


6. Click on the **+ Plan Item** link on the right.

- Choose **Review Student Learning Outcome** or **Review Operational Outcome** from the drop-down list.

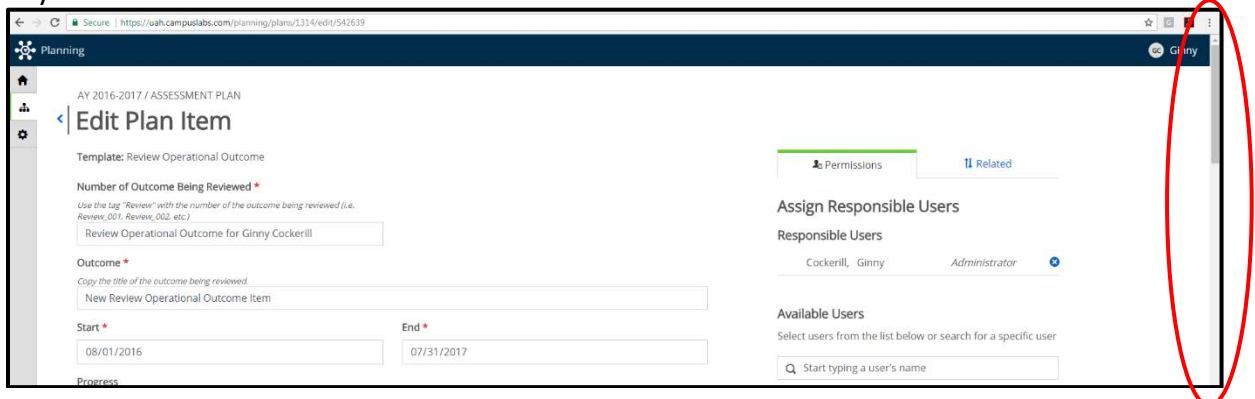


This opens a blank Review Item template for you to complete.



Note: Changes to a Review Item are saved immediately. Textboxes include an Undo option but there is no cancel or undo option for the Review Item as a whole.

- 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.
- Use the **scrollbar** or the tab key to navigate through the rest of the template. Or use the Tab key to move from one field to the next.

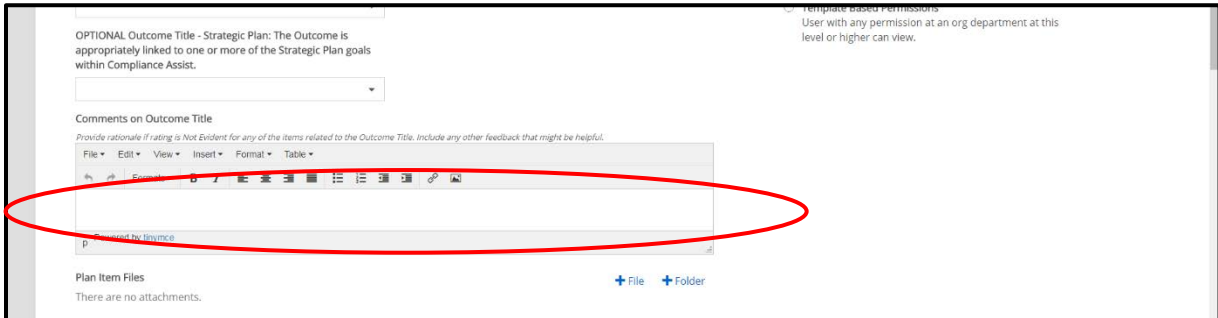


11. Click the dropdown menu next to each item and choose the appropriate response, “Evident” or “Not Evident.”



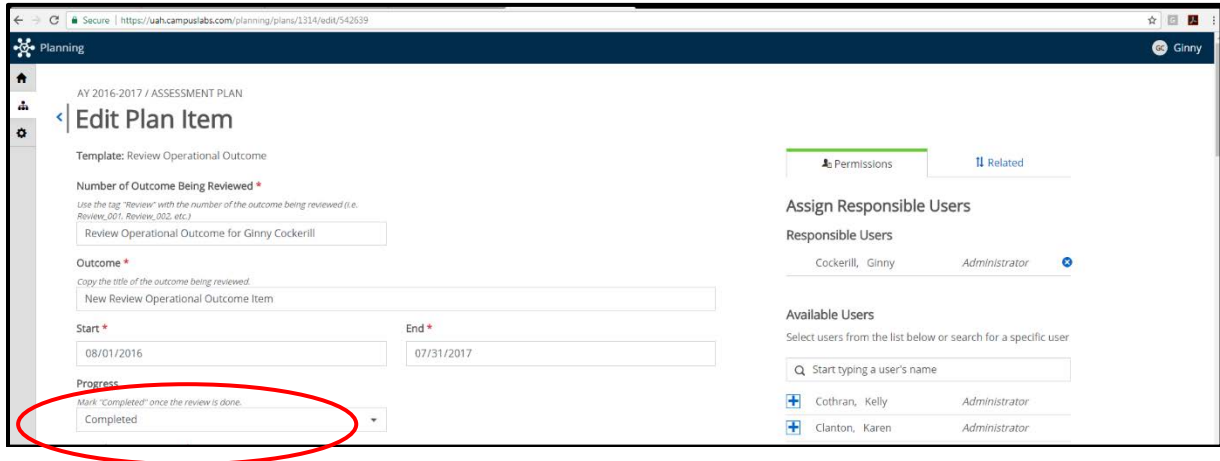
The screenshot shows the Planning interface. On the left, there are date pickers for '08/01/2016' and '07/31/2017'. Below them is a 'Progress' section with a dropdown menu. The 'Providing Department' is set to 'Institutional Research and Assessment'. The 'Outcome Title - Service or Process' dropdown menu is circled in red, showing options 'Evident' and 'Not Evident'. To the right, there is a search bar and a list of users with their roles (Administrator).

12. 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.



The screenshot shows the Planning interface. The 'OPTIONAL Outcome Title - Strategic Plan' section is visible. Below it, the 'Comments on Outcome Title' section has a text area circled in red. The text area contains the text 'Submitted by brynce'.

13. Change the **Progress** field to “Completed” when all fields are filled in.



AY 2016-2017 / ASSESSMENT PLAN

Edit Plan Item

Template: Review Operational Outcome

Number of Outcome Being Reviewed *
Use the tag "Review" with the number of the outcome being reviewed (i.e. Review_001, Review_002, etc.)
 Review Operational Outcome for Ginny Cockerill

Outcome *
Copy the title of the outcome being reviewed.
 New Review Operational Outcome Item

Start * 08/01/2016 **End *** 07/31/2017

Progress
Mark "Completed" once the review is done.
 Completed

Assign Responsible Users

Responsible Users

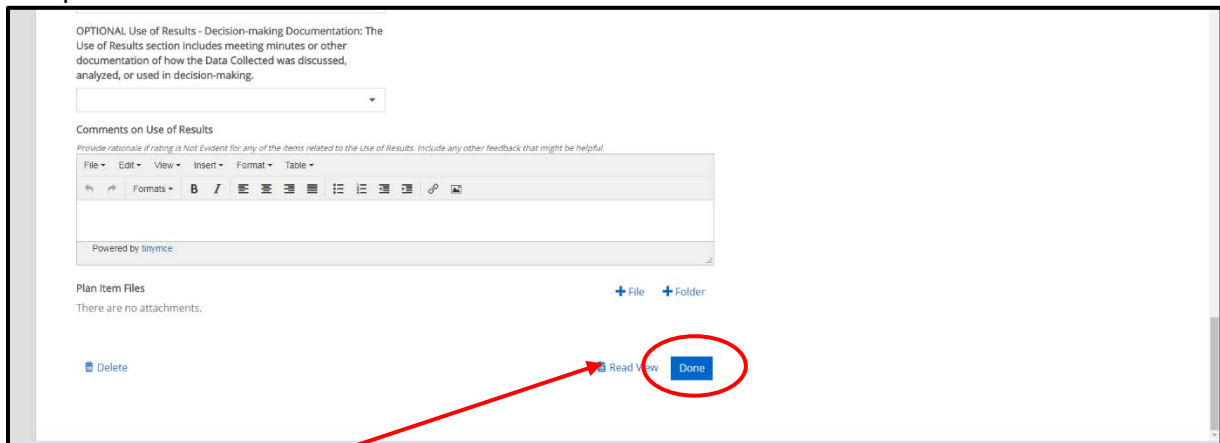
Cockerill, Ginny	Administrator
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Available Users
 Select users from the list below or search for a specific user

Search: Start typing a user's name

Cothran, Kelly	Administrator
Clanton, Karen	Administrator

14. Click the blue **Done** button at the bottom of the page to exit or when the review item is complete.



OPTIONAL Use of Results - Decision-making Documentation: The Use of Results section includes meeting minutes or other documentation of how the Data Collected was discussed, analyzed, or used in decision-making.

Comments on Use of Results
Provide rationale if rating is Not Evident for any of the items related to the Use of Results. Include any other feedback that might be helpful.

File Edit View Insert Format Table

Formats B I Text Color Background Color Link Unlink

Powered by tinymce

Plan Item Files
 There are no attachments.

+ File + Folder

Delete Read View Done

15. Use the **Read View** button to view the review item as it will appear in a report.