

Louisiana State University at Eunice



**Campus Labs Planning Module
Training Manual**

Section V: The Dashboard

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Revised May 4, 2020

Section V: Entering the Planning System and the Home Dashboard Page

Users familiar with the Planning System will immediately notice a new look. The updates changed the look of the planning system in an effort to make it more functional while requiring fewer web pages and clicks. **1)** Each user will land on the Dashboard Home Tab in the current academic year (in red circle). Please make sure that the academic year is set to the desired year; otherwise, it may lead to updating material in an incorrect year. **2)** Below the Home Tab is the Plans Tab that will be discussed later. **3)** The Settings Tab at the bottom has limited functionality for most users because most permissions are set when a user is given access to the system.

4) The home page will open in default mode, but the user may apply various filters. The **5)** Sort is set to Default so items are sorted by number. Items with no numbers will appear first in the list of planning items. **6)** Announcements now appear on the Dashboard Page. Please pay attention to any announcements that apply to all users. **7)** The My Items Tab is where most users will find planning items that they have created. This may be a small number if the Director of Institutional Effectiveness created the items. The **8)** Responsible Items Tab represents the planning items the user is directly responsible for completing. The **9)** Contributor Tab contains the items that the user may assist with completing even though they are not directly responsible for completing them. Next, **10)** is a vision planning item. There are no longer any lemons, globes, or hour glasses to identify planning elements, however, the title, the type of plan, and the whether the item is a goal or an objective is grouped together as shown for convenience. Please note that there are two number 10s – one showing a vision and one showing a goal. **11)** Any planning element, whether it be a vision, mission, goal, or objective may be edited by clicking on the [blue hyperlink](#) noted by the arrow. The user may click on the title and the system will enter the editing screen for that item. The **12)** Plan items listed in this area are the specific types of templates that are available to the user.

The screenshot shows the Planning System Dashboard for AY 2019-2020. The dashboard includes a navigation bar with tabs for Dashboard, My Plan Items, FILTER, and Sort (Default). Below the navigation bar are three filter tabs: My Items (12), Responsible Items (0), and Contributor (0). The main content area displays a list of planning items, including Pathways to Success Vision, Pathways to Success Mission, and Increase overall unduplicated enrollment headcount. The right side of the dashboard features an Announcements section and a Plans section. The Plans section lists Strategic Plan, Assessment Plan, and General Education. Callout boxes provide details about these plan types.

1) Dashboard (circled in red)

2) My Plan Items

3) FILTER

4) My Items (12)

5) Sort: Default

6) Announcements

7) Pathways to Success Vision

8) Responsible Items (0)

9) Contributor (0)

10) Pathways to Success Vision

10) Increase overall unduplicated enrollment headcount

11) Pathways to Success Mission

12) Strategic Plan

12) Assessment Plan

12) General Education

Callout 1: Vision and mission both institutional and departmental.

Callout 2: Goals and objectives developed by individual departments.

Callout 3: General Education Goals at the Academic Affairs level and departmental level.

While this Dashboard looks “different” from what LSU Eunice users are used to, it is more functional than the multiple tab format of the past. As noted, clicking on the various planning elements on the right **12)** allows the user to examine and edit their individual plans for the current year, however, it is recommended to use the **2)** Plans Tab instead which will be covered in an upcoming section.