

Louisiana State University at Eunice



**Campus Labs Planning Module
Training Manual**

**Section VIII: Editing an Existing Outcome Assessment
Goal in the Plans Tab
include Editing,
Upward Relationships,
Downward Relationships,
Summary of Relationships, and
Read View**

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Revised May 4, 2020

Section VIII: Editing an Existing Outcome Assessment Goal in the Plans Tab

This section includes:

[Editing an Existing Outcome Assessment Goal](#)

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Editing an Existing Outcome Assessment Goal

To begin the process of editing an Outcome Assessment Goal, the user can begin on the Dashboard (home) Tab or Plans Tab. In order to edit an Outcome Assessment Goal in the **1)** Plans Tab, it is first necessary to change the plan item to **2)** for the **3)** academic year desired while ensuring that the user is still in their **4)** own department in the organizational tree. Click on **2)**

The screenshot shows the Planning application interface. On the left, a navigation menu is visible with the following items: AY 2019-2020, Strategic Plan, Assessment Plan, General Education, search..., LSU Eunice, Chancellor, Academic Affairs, Liberal Arts, AA/VT, Care and Development of Young Children, and General Studies. The 'Assessment Plan' item is highlighted with a red box and labeled '2'. The 'AY 2019-2020' item is labeled '1'. The 'Liberal Arts' item is labeled '4'. The main content area displays the 'Liberal Arts' page for the 'AY 2019-2020 / STRATEGIC PLAN'. The page title is 'Liberal Arts' and it shows 'Plan Items' and 'Reports' tabs. A 'FILTER' box is present, along with a 'Sort' dropdown set to 'Default' and a '+ Plan Item' button. Below this, the 'Liberal Arts Mission' is displayed with the text 'Liberal Arts Mission' and the date range '11/1/19 - 10/31/20'. At the bottom, it shows 'Show 10' and 'Viewing 1-1 of 1'.

Clicking populates the plan items with the Outcome Assessment Goals and the Outcomes Assessment Objectives for the user's department as shown in the next screen shot. The left side of the screen shows that the user is in the **1)** AY 2019-2020 planning year shown both in the upper left and at the right for each planning item. The user is currently working with **2)** and is looking at the **3)** Liberal Arts goals and objectives. There are three **4)** goals and three **5)** objectives in the screen shot below.

AY 2019-2020 / ASSESSMENT PLAN

Liberal Arts

Plan Items Reports

FILTER Sort Default + Plan Item

19-20 In working to maintain an effective developmental education program, Pathways to Success will provide students the necessary support for the successful completion of their developmental coursework.

Liberal Arts
1:Outcomes Assessment Goal 11/1/19 - 10/31/20

General Education: LSUE will provide students the necessary support for the successful completion of the first general education course in English and social science after the completion of developmental education.

Liberal Arts
2:Outcomes Assessment Goal 11/1/19 - 10/31/20

19-20 Retention of EDUN, PSYC, and SOCL Liberal Arts Majors

Liberal Arts
4:Outcomes Assessment Goal 11/1/19 - 10/31/20

Developmental English (ENGL 0001)

Liberal Arts
1.1:Outcomes Assessment Objective 11/1/19 - 10/31/20

Orientation to University Studies (UNIV 1005)

Liberal Arts
1.2:Outcomes Assessment Objective 11/1/19 - 10/31/20



College Reading (UNIV 0008)

Liberal Arts
1.3:Outcomes Assessment Objective 11/1/19 - 10/31/20

For this example, the user has clicked on the “19-20 Retention of EDUN, PSYC, and SOCL Liberal Arts Majors” which is an existing Outcome Assessment Goal so that it may be edited. When the goal is opened, most of the information below is automatically populated since the goal already existed. Note that the red identification letters in the list below will be used for throughout this section to refer to the plan items shown.

- A. Identifies that this is an Outcomes Assessment Goal Template that is set up in the system and is in edit mode.
- B. Identifies the academic year that is set in the planning system.
- C. Identifies the goal number. All goals in a specific department should have a unique number.
- D. The actual goal. In this case is deals with retention Liberal Arts students with specific majors. Goals do not need to be measurable; they may be a general statement as shown in this example.
- E. Date ranges set by the system. The user should not change the dates.
- F. The progress is blank initially and should not be changed by the user. The Director of IE changes the progress when items are complete at the end of the planning year.
- G. Liberal Arts is responsible for the completion of this goal.
- H. Budgets are not populated initially because budgets change from year to year. If new funds are being requested, then a dollar amount must be entered. If no new funds are being requested, then “budget currently exists” or “no new funds requested” can be entered. Note that one of the two situations require that something is entered for this item; **it cannot be left blank.**
- I. Clicking Delete will remove the item from the planning system. A dialogue box will open asking the user if the item should be removed. **Once deleted and confirmed, the item cannot be recovered.**
- J. The Read View button can be used to open a new window in order to print or check formatting. As mentioned earlier, the user should be sure that the item has automatically saved by clicking in the

same window, but outside the editing text box. A check mark inside a green circle will appear indicating that the item has been saved. After doing this, then click the read view button.

- K.** Click Done when finished editing the item. The item will automatically save and will return the user to the Plans Tab for the given year and department.
- L.** The [Permissions Tab](#) indicate who is responsible for the planning item – in this case the goal. Note that permissions for most users are restricted by the administrator.
- M.** The [↑↓ Related Tab](#) will relate the goal to the institution’s strategic and institutional goals the goal supports. It will also relate the goal to the objectives that support it. This will be illustrated in the next section.
- N.** The [History Tab](#) will give a detailed view of past versions of the goal.
- O.** The assigned responsible user is the specific person responsible for completing the goal is the Dean of Liberal Arts. Clicking the  will remove the current assigned user.
- P.** Available users are other individuals within the Campus Labs Planning System that can see the goal along with their permissions. Clicking the  sign next to an individual users’ name will result in the goal being assigned to that person. Please do not change assignments without first contacting the Director of IE.
- Q.** Visibility is whether the item may be viewed by other departments. Please set to public.

Remember, this is an example of a goal that existed in the system so most of the information was prepopulated. The goal, in most cases, needs just a few edits in order to be considered complete for a given year. If necessary, users should remember to edit the **C)** goal number, **D)** the actual goal, and the **H)** budget information. Any **L)** and **O-P)** Permissions changes that need to be made will require a discussion with the Director of IE. When complete, click Done.

AY 2019-2020 / ASSESSMENT PLAN

Edit Plan Item

A Template: Outcomes Assessment Goal

C Goal Number *
4

D Goal *
19-20 Retention of EDUN, PSYC, and SOCL Liberal Arts Majors

E Start *
11/01/2019

E End *
10/31/2020

F Progress

G Provided By *
 Liberal Arts

H Budget Information

I [Delete](#)

J [Read View](#) **K** [Done](#)

Dates are set by the system. Please do not change.

Progress should be left blank.

Budget may not be left blank.

L **M** **N**

[Permissions](#) [Related](#) [History](#)

Assign Responsible Users

O Responsible Users

Mahoney, Sandra Administrator

P Available Users

Select users from the list below or search for a specific user

Q Start typing a user's name

- P** Ardoin, Brian Administrator
- Batiste, Barbara Administrator
- Cilano, Joe Administrator
- Cormier, Sondra Administrator
- Fontenot, Billy Administrator
- Fowler, Paul Administrator
- Fowler, P Administrator
- Fruge, Courtney Contributor
- Greaud, Angela Administrator
- Gulllory, Keisa Renee Administrator

Show 10 Viewing 1-10 of 37

Previous 1 2 3 4 Next

Q Item Visibility

- Private
Item is not public
- Org Level Permissions
Viewable to users at a providing org level or lower
- All Users
Item is viewable to all users in the system

Assigned user. Clicking the ✖ will remove the current assigned user.

Available users in the system. Clicking the + next to an individual's name will assign the goal to that user. Contact the Director of IE prior to making any changes.

Upward Relationships for an Existing Outcome Assessment Goal in the Plans Tab

After the Outcome Assessment Goal has been edited, two further steps are needed prior to submitting it to the Director of IE to be reviewed. Outcome Assessment Goals must be related to institutional and strategic goals that the department goal supports and related to the Outcome Assessment Objective that support them. Please note that this step is completed after the goal is edited and saved.

After saving, click the **MRelated Tab on the right side of the screen from the screen shot above. The screen shot below will open. To relate the departmental goal **R**) upward to institutional and strategic goals, click “+Supports”. To related to departmental objectives, click “+Supported By”.**

AY 2019-2020 / ASSESSMENT PLAN

Edit Plan Item

Template: Outcomes Assessment Goal

Goal Number *

4

Goal *

19-20 Retention of EDUN, PSYC, and SOCL Liberal Arts Majors

Start *

11/01/2019

End *

10/31/2020

Progress

Provided By *

 Liberal Arts

Budget Information

Permissions **M** Related HistorySupports
(Connected Up)**R**

No Connections have been added.

This Item

Supported By
(Connected Down)**S**

No Connections have been added.

This area in editing mode and may be updated if needed.

Relating upward to institutional and strategic goals. Click "+Supports"

Relating downward to departmental objectives. Click "+Supported By"

Clicking "+Supports" above takes the user to a Related Up Screen as shown below. Because institutional and strategic goals are in the Strategic Plan section of planning, it will be necessary to choose the **T** in the Assessment Plan drop down to change to the strategic plans section (see screen show below). Be sure that the **U** academic year is the current year being edited and that the **V** organizational chart has LSU Eunice selected.

Verify that the academic year is the same being edited from above.

Click Assessment Plan drop down and choose Strategic Plan.

Verify that the organizational chart has LSU Eunice selected.

Once all settings are correct and the user clicks on the **T** Strategic Plan in the Assessment Plan drop down, the screen below will be populated with LSU Eunice's **W** current strategic goals.⁵ The current **U** academic year and place in the **V** organizational chart will be maintained.

Users should now choose the appropriate **W** institutional and/or strategic goals that apply to their departmental goal by clicking on the **+**. For this example, only strategic goals are listed so the user must choose at least one. In the case where both institutional and strategic goals appear, then it is important to

⁵ Please note that LSU Eunice's institutional and strategic goals are currently under review. Currently, the administration is using only strategic goals in the planning system; however, this is likely to change to both institutional and strategic goals in the future.

choose at least one from both types of goals. As the user clicks the **+**, the strategic goals will populate under **X)** connects up.

19-20 RETENTION OF EDUN, PSYC, AND SOCL LIBERAL ARTS MAJORS

Select a Supports (Related UP) Item

U AY 2019-2020

T Strategic Plan

V LSU Eunice
Chancellor

W Click the **+** to relate the current goal to LSU Eunice's strategic goal. The user must choose at least one.

Title reflects the goal being completed.

FILTER		
To serve the citizens of Louisiana and position the University strategically, LSU Eunice seeks to ensure student access.		+
LSU Eunice	1. Ensure Access:Strategic Goal	11/1/19 - 10/31/20
To serve the citizens of Louisiana and position the University strategically, LSU Eunice seeks to strengthen student success.		+
LSU Eunice	2. Student Success:Strategic Goal	11/1/19 - 10/31/20
To serve the citizens of Louisiana and position the University strategically, LSU Eunice seeks to expand partnerships.		+
LSU Eunice	3. Partnerships:Strategic Goal	11/1/19 - 10/31/20
To serve the citizens of Louisiana and position the University strategically, LSU Eunice seeks to demonstrate a culture of continuous improvement.		+
LSU Eunice	4. Improvement:Strategic Goal	11/1/19 - 10/31/20

Shows 10 | Viewing 1-4 of 4

Supports (Connected Up) X
No Connections have been added.

This Item

Supported By (Connected Down)
No Connections have been added.

[← Back to Plan Item](#)

After clicking the **+**, strategic goals will populate in this area.

After the **+** is clicked from the screen shot above, a **✓** will indicate that it was selected (see screen shot below). The dean did not choose one of the strategic goals as indicated by the **+** sign. Note that the strategic goals have now populated the **X)** Connects Up section. Any strategic goals that should not be in the **X)** connected up section may be removed by clicking on the **✘**. When finished, click [← Back to Plan Item](#) in the lower right corner.

19-20 RETENTION OF EDUN, PSYC, AND SOCL LIBERAL ARTS MAJORS

Select a Supports (Related UP) Item

U AY 2019-2020

T Assessment Plan

V LSU Eunice
Chancellor

W The user chose to relate this goal to #1, 2, and 4 of LSU Eunice's strategic goals as indicated by the **✓**.

Title reflects the goal and year being completed.

FILTER		
To serve the citizens of Louisiana and position the University strategically, LSU Eunice seeks to ensure student access.		✓
LSU Eunice	1. Ensure Access:Strategic Goal	11/1/19 - 10/31/20
To serve the citizens of Louisiana and position the University strategically, LSU Eunice seeks to strengthen student success.		✓
LSU Eunice	2. Student Success:Strategic Goal	11/1/19 - 10/31/20
To serve the citizens of Louisiana and position the University strategically, LSU Eunice seeks to expand partnerships.		+
LSU Eunice	3. Partnerships:Strategic Goal	11/1/19 - 10/31/20
To serve the citizens of Louisiana and position the University strategically, LSU Eunice seeks to demonstrate a culture of continuous improvement.		✓
LSU Eunice	4. Improvement:Strategic Goal	11/1/19 - 10/31/20

Shows 10 | Viewing 1-4 of 4

Supports (Connected Up) X

To serve the citizens of Louisiana and position the University strategically, LSU Eunice seeks to ensure student access.
LSU Eunice Strategic Goal ✘

To serve the citizens of Louisiana and position the University strategically, LSU Eunice seeks to strengthen student success.
LSU Eunice Strategic Goal ✘

To serve the citizens of Louisiana and position the University strategically, LSU Eunice seeks to demonstrate a culture of continuous improvement.
LSU Eunice Strategic Goal ✘

This Item

Supported By (Connected Down)
No Connections have been added.

[← Back to Plan Item](#)

After clicking the **+**, strategic goals will populate in this area.

When finished, click [← Back to Plan Item](#) to return to the goal.

Clicking on [Back to Plan Item](#) takes the user back to the goal as indicated below. The strategic relationships are now related on the right side. Users should notice that the **R**) strategic goals selected are on the **M**) [Related Tab](#) for the **E**) given year indicated. Next, to add downward relationships to the departmental objectives, click on **S**) [+Supported By](#)”.

AY 2019-2020 / ASSESSMENT PLAN

Edit Plan Item

Template: Outcomes Assessment Goal

Goal Number *

4

Goal *

19-20 Retention of EDUN, PSYC, and SOCL Liberal Arts Majors

Start *

11/01/2019

End *

10/31/2020

Progress

Provided By *

Liberal Arts

Budget Information

Budget exists, no new funds needed

[Delete](#) [Read View](#) [Done](#)

Title reflects the goal and year being completed.

Permissions **M** Related (3) History

Supports (Connected Up) **R** + Supports

To serve the citizens of Louisiana and position the University strategically, LSU Eunice seeks to ensure student access.
LSU Eunice Strategic Goal

To serve the citizens of Louisiana and position the University strategically, LSU Eunice seeks to strengthen student success.
LSU Eunice Strategic Goal

To serve the citizens of Louisiana and position the University strategically, LSU Eunice seeks to demonstrate a culture of continuous improvement.
LSU Eunice Strategic Goal

This Item

Supported By (Connected Down) **S** + Supported By

No Connections have been added.

Downward Relationships for an Existing Outcome Assessment Goal in the Plans Tab

Clicking on [+Supported By](#)” results in the screen shot below for **U**) the academic year being edited and the assessment plan section of **T**) [Assessment Plan](#). The user should verify that the **V**) organizational chart has landed on the department being edited. If not, the user will need to click through the **V**) organizational chart down to their own department because the window may open with LSU Eunice indicated. The LSU Eunice level of the organizational chart has no objectives. At least one departmental objective must be related to the goal being edited by clicking on the **+**. In this case, goal 4.1 noted by the has been selected and is populated in the **S**) connected down section. When finished, click [Back to Plan Item](#) .

19-20 RETENTION OF EDUN, PSYC, AND SOCL LIBERAL ARTS MAJORS

Select a Supports (Related DOWN) Item

Title reflects the goal and year being completed.

Clicking on the [Back to Plan Item](#) button will return the user to goal 4 keeping in mind that it is still in **M**) edit mode and with the **Related Tab** selected. The **R**) upward relationships are now shown on the right along with the **S**) downward relationships. The user may now click **K**) [Done](#) if everything is completed or **J**) if the item has been saved and a print copy is desired.

AY 2019-2020 / ASSESSMENT PLAN

Edit Plan Item

Template: Outcomes Assessment Goal

Goal Number *

Goal *

Start *

End *

Progress

Provided By *
 Liberal Arts

Budget Information

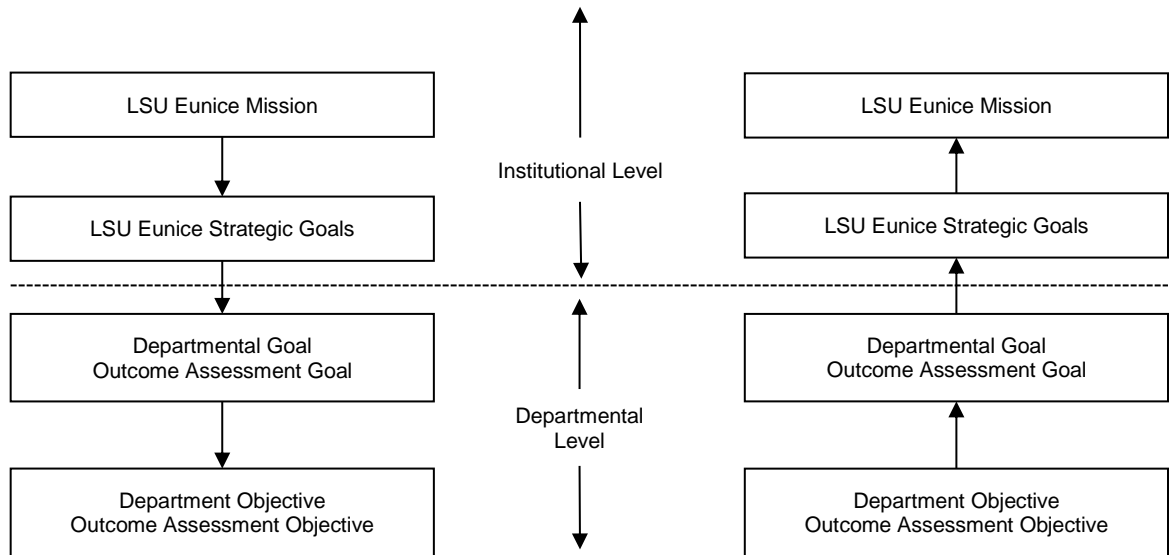
[Delete](#)

[Read View](#) [Done](#)

J **K**

Summary of Relationships

A summary of the relationships just created is shown in the figure below. Both circumstances are valid in that the department goals and objectives flow from the mission of the institution and both flow upward to support the mission.



The Read View

Clicking the [J\) Read View](#) from the screen shot above displays as shown in the screen shot below. This Outcome Assessment Goal is ready for review by the Director of IE once its Outcome Assessment Objectives are completed for this goal.

B AY 2019-2020 / ASSESSMENT PLAN
19-20 Retention of EDUN, PSYC, and SOCL Liberal Arts Majors

This view always presents the most current state of the plan item.
 Plan Item was last modified on 4/20/20, 9:35 AM
 Your individual permission settings determine what fields and content are visible to you.

[Go to Item in Planning](#)

[Print](#) [Share Item](#)

Template:

A Outcomes Assessment Goal

C Goal Number:

4

D Goal:

19-20 Retention of EDUN, PSYC, and SOCL Liberal Arts Majors

Start:

11/1/2019

End:

10/31/2020

E

F Progress:

G Provided By:

Liberal Arts

O Participants:

Sandra Mahoney (smahoney@lsue.edu)

H Budget Information:

Budget exists, no new funds needed

Related Items

Supports (Connected Up):

To serve the citizens of Louisiana and position the University strategically, LSU Eunice seeks to ensure student access.

LSU Eunice Strategic Goal

To serve the citizens of Louisiana and position the University strategically, LSU Eunice seeks to strengthen student success.

LSU Eunice Strategic Goal

To serve the citizens of Louisiana and position the University strategically, LSU Eunice seeks to demonstrate a culture of continuous improvement.

LSU Eunice Strategic Goal

R

S Supported By (Connected Down):

19-20 Retention- Aggregated Liberal Arts Majors of EDUN, PSYC, and SOCL
Liberal Arts Outcomes Assessment Objective