Campus Labs User Guide: Assessment Planning

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Logging In

- Open Campus Labs in your browser: [https://coastal.campuslabs.com/](https://coastal.campuslabs.com/). You can also access the program from the Faculty and Staff page under Quick Links: [https://www.coastal.edu/info/facstaff/](https://www.coastal.edu/info/facstaff/).
- Sign in with your CCU Username and Password.

Getting Assistance

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Campus Labs Help Center: [https://campuslabs.zendesk.com/hc/en-us/](https://campuslabs.zendesk.com/hc/en-us/) or link directly from the Planning Dashboard screen.
Selecting from the Campus Labs Tools

- Select the *Planning* link.
Navigating the Dashboard

- Select the **Planning** link to return to the CCU Campus Labs Tools page.
- Select the **Notifications** link to view the notification history of or download previously generated reports.
- Select **Name** link to access product support resources and to log out.

- Dashboard and Plans tabs: Select the **Dashboard** tab to return to the main Dashboard at any time. Select the **Plans** tab to navigate between templates and fiscal years.

- Fiscal Year: The current fiscal year will be set as the default. Select the **Plans** tab to navigate to a different time period.
- Only plan items falling within the default year will be viewable in the dashboard.
Filtering Dashboard Items

- Select the "FILTER" link to show specific items in Plans, Progress Options, and Templates.
  - This example will display Unit Objectives/Outcomes that are In Progress for a given Unit Assessment Plan.

- Select "Apply Filters" to confirm the selection.
- Select "Clear Filters" to remove filter selections.
Sorting Dashboard Items

- Select the ▼ in the Sort box to sort the screen by the desired list item.
- Select Number Identifier to group by Unit Goals and corresponding Unit Objectives/Outcomes.
- Select Default in the drop-down list to return to the original sorting order.

Workflow Tabs

- My Items: Any items you have created. We will only be using the My Items tab during the initial upgrade.
- Responsible Items: Any items assigned to you.
- Contributor: Any items you can edit based on your permissions.
Announcements and Plans

Announcements: Contains current news, due dates, the most recent version of the Campus Labs Planning User Guides, etc. Select each announcement to read additional information or download documents.

Plans: Plans you have access to review and/or edit. All users have review access to the University's strategic plan. To gain quick access to your unit assessment plan, select the Unit Assessment Plan link. This is the plan template you will use to create and edit your assessment plans and reports.

Some Notes About Navigation

- As you navigate through the system, current selections will be identified by a green bar at the top or side of a tab.

- Select the symbol to return to the main Plans tab.
Creating Assessment Plans

- Select the *Plans* tab to view, create, and edit plans (templates) available.
- Use the FY drop-down menu to select the appropriate fiscal year.
- Use the Plan drop-down menu to select the template you want to work with. Select the *Unit Assessment Plan* template.

- Your department and others you have access to are listed under the My Units tab.
- Navigate to and select the desired unit or program.

Creating Unit Goals

- Select the Plan Item drop-down list to create a new Unit Goal.
- Select *Unit Goal*. 
Unit Goal Template:

- Select the large blue Done button at the lower right corner of the template to save your work.
Creating Unit Objectives and Student Learning Outcomes

- Select the Plan Item drop-down list to create a new Unit Objective/Outcome.
- Select Unit Objective/Outcome.

**Unit Objective/Outcome Template:**

- Number the objectives and SLOs sequentially to correspond with the associated goal. Number as 1.1, 1.2, etc.
- Select Objective or Student Learning Outcome
- This text will appear on the main Plan Items tab.
- Remember to use one measurable verb for each objective or SLO.
• Select the large blue *Done* button at the lower right corner of the template to save your work.
Attaching Documents to Objectives/SLO fields

- Select the **+File** link corresponding to the field (i.e. description of assessment).

- Navigate to and select the file you want to upload.
- Select **Open**.
- You will be returned to the Unit Objective/Outcome template and the file will be attached.

Sharing Documents Across Plan Items

Documents may be added to the plan Documents repository and linked across different plan items (Objectives/SLOs).

- Select the **Documents** tab from the Plans tab.
- Document features include:
  - **+File** – Select to add a new file
  - **+Folder** – Select to create a folder(s) to organize documents
  - **Rename** – Select to rename the main Files directory
  - **Delete** (trash can) – Select to delete the Files directory
Uploading Files

- Select the +File link.
- The upload window will open on your computer:

![Image of file upload window]

- Navigate to and select the file you want to upload.
- Select Open.
- The file is now uploaded.

Adding the Uploaded Files to the Plan Item

- Select +Linked Document under the text box associated with the uploaded file(s).
- Navigate to and select the file to upload.
- Select the Link Documents button.

Pasting as Plain Text

- If copying text from a Word document highlight and copy the text to the clipboard.

![Image of Word document]

- Select Edit, Paste as Text to copy the text into the text box.

![Image of plain text mode]

- The plain text mode notification box will open.
- Position your cursor over this box and select CTRL+V to paste your copied text into the box.
- Select the ✗ to close the plain text mode notification box.

Deleting Plan Items

- Select the Delete button at the lower left corner of the template to delete plan items.
Printing Plan Items

- Select the **Read View** button at the lower right corner of the template to open printing options.
- Select the **Print** button to select print options.

![Print Options](image)

- Select the large blue **Print** button to print the page(s).
- When finished, select the **Go to Item in Planning** link to return to the plan item.

Establishing Related Item Connections

Relating Unit Objectives/SLOs to Unit Goals

To establish a connection or relationship from one plan item to another (e.g. connect unit objectives/SLOs to unit goals), open the objective/SLO you wish to establish the connection for. It is recommended that you establish relationships from the bottom up; from unit objectives/SLOs UP to unit goals.

![Related Connections](image)

- Select the **Related** tab within objective/SLO.
- Select the **+Supports** link.
• Navigate to the correct organizational using the Search box or clicking through the organizational chart.
• Select the unit.
• A list of plan items available to establish a relation with will be visible.

• Select the plus button to establish the relation with the desired goal.
• You will see that the relation has been established.

• Select the Back to Plan Item link at the bottom right corner of the screen to return to the objective/SLO.
Relating Unit Objectives/SLOs to Strategic Plan Goals and Objectives

Relations may be established between unit plan objectives/SLOs and the strategic plan objectives.

- Select the *Related* tab within objective/SLO.
- Select the +*Supports* link.

- Select *Strategic Plan 2016-2021 High Impact Engagement* from the plan drop-down list.
- Select *Coastal Carolina University* from the organizational structure.
• Strategic Goals and Strategic Objectives will be listed.
• Select the plus button to establish the relation with the desired goal or objective.
• You will see that the relation has been established.

NOTE: You can use the FILTER to see only Strategic Goals or Strategic Objectives.

Removing Relationships

• Relationships can be removed by selecting the "x" beside the goal or objective you want to remove the relationship with.
Printing the Unit Assessment Plan

- From Plan Items tab navigate to the desired unit.
- Use the FY drop-down menu to select the appropriate fiscal year.
- Use the Plan drop-down menu to select the Unit Assessment Plan.
- Select the Reports tab.
Available reports will be listed.

Select the View Report link to select various report options.

The Customize Dates link will allow you to choose the desired FY for the Unit Assessment Plan report.
Select the View Report button to open a new tab and view the report.
Close the report tab to return to the Custom Report Date Range page.
Select the symbol or to return to the main Plans tab.