This guide will assist Campus Labs users in creating and documenting strategic plan items within the planning module. The following pages provide navigational information and relevant step-by-step instructions.

For more in-depth resources and support for Campus Labs platforms, visit campuslabs.zendesk.com/hc/en-us/

Contents:

Navigating the planning module and creating plan items
pg. 2 - 9

Saving data views in Baseline for export
pg. 10 - 13

Linking data to plan items
pg. 14 - 17
Visit lclark.campuslabs.com/home to access the Campus Labs dashboard.

Use Baseline to distribute surveys through email and analyze results.

Use Planning to track and update your department’s strategic activities.
The Planning dashboard displays plan items owned by the user.

Select the **Plans** tab to access your department’s plan items.
1. Select the current fiscal year

2. Select Lewis and Clark

3. Select Division of Student Life
View your department’s plan items

Select your department

Arrow icon indicates item is connected to other item(s)

Upload documents here, such as interview transcripts

Person icon indicates item is assigned to a user

5
Click this button to add a **plan item**

Department mission, goal, outcome, and measure are typical plan items.
Fill in your plan item (pg. 1 of 2)

Number plan items sequentially, beginning with “1.” This orders items in reports.

Provide a descriptive title “In progress” and “ongoing” goals will surface in dashboard view.

Permissions assign plan items to users. Assigned items will surface in dashboard view.

Use related to connect to related plan items (details see pg. 9).
Define the assessment method

Link any relevant documents (see pages 16-17)

Update the results of your goal at the end of the academic year

Scroll to bottom of page to save with “Done”
Connecting plan items: reach this page through the “related” tab in the plan item edit screen

1. Click through to the Division, then to your department

2. Select appropriate connections
   Note: items can have multiple connections either up or down

3. Click to save connections
1. Begin at the baseline homepage

2. Click Manage Projects
3. Search for a specific project here

4. Click on a project to continue
5. Click the **Add/Remove Questions** tab

6. Select question(s) from the survey relevant to your plan item

7. Click **Apply**
Questions with pre-set answer selections will display response counts.

Click the Responses view expander to display all answers to open-ended questions.

8. View options order questions and select frequency or graph display.

9. Name the view and click save.
Linking data to plan items, method 1: importing from baseline (pg. 1 of 2)

1. Begin by editing the measure you wish to link data to.

Note: baseline data links only to measures.

2. Provide a descriptive name for the data you will link.

3. Click the + Baseline button.
Linking data to plan items, method 1: importing from baseline (pg. 2 of 2)

4. Search for your project name
5. Select the project containing your target data

6. Select from saved data views for the project (see pages 10-13)

Selected data sources appear here

7. Click back to plan item to save
1. Navigate to your department home page
2. Select the Documents tab
3. Upload a single file or a folder

View and edit uploaded documents
4. Edit the **plan item** you wish to link to.

   **Note:** documents link to goals, outcomes, or measures.

5. Scroll down to the **linked document** button.

6. Select the **appropriate document(s)**

7. Click **Done** to save.