Campus Labs planning module user guide
Prepared by the **L&C Student Life Assessment Committee**

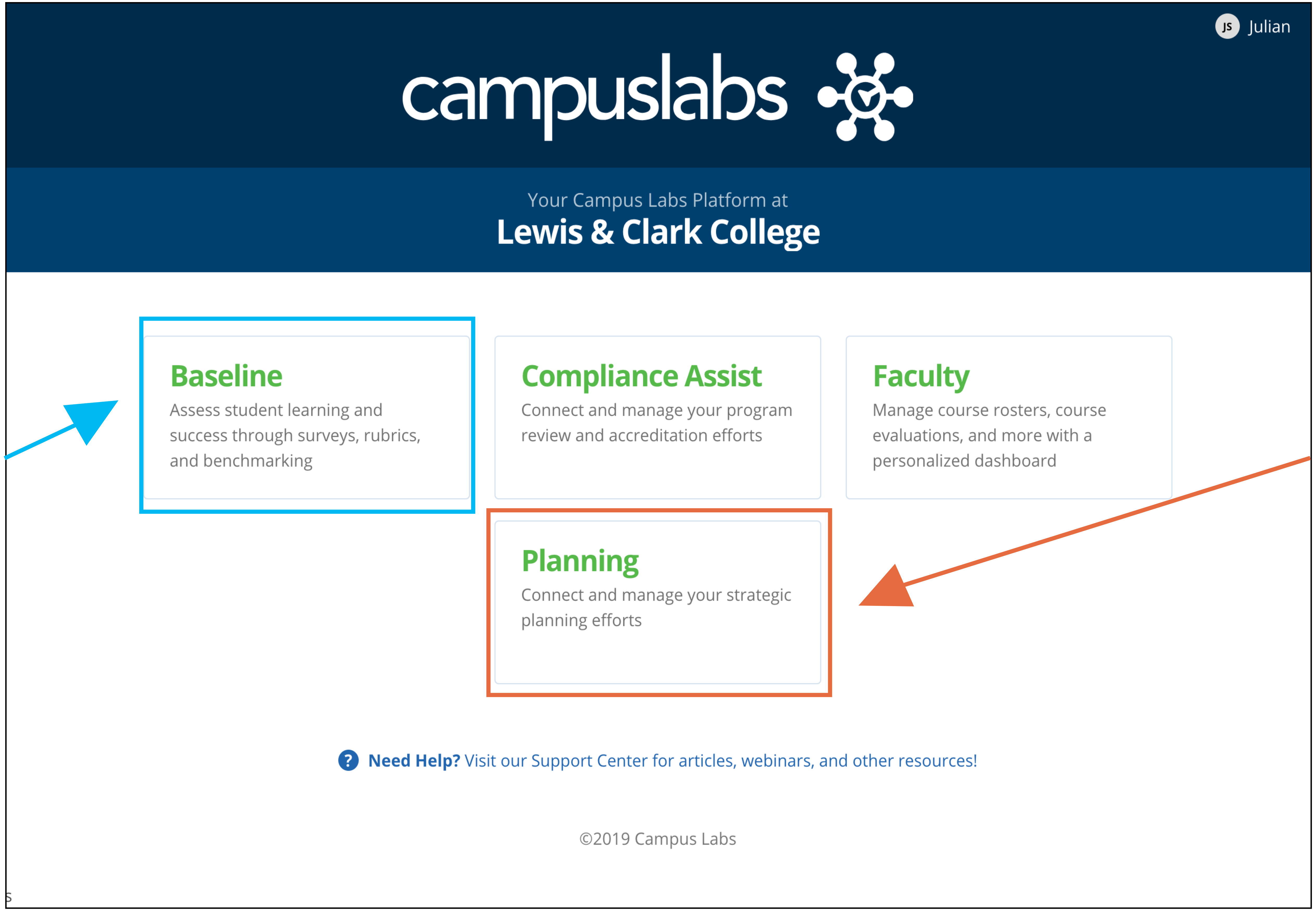
This guide will assist Campus Labs users in creating and documenting strategic plan items within the planning module. The following pages provide navigational information and relevant step-by-step instructions.

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

Contents:

Visit lclark.campuslabs.com/home to access the Campus Labs dashboard

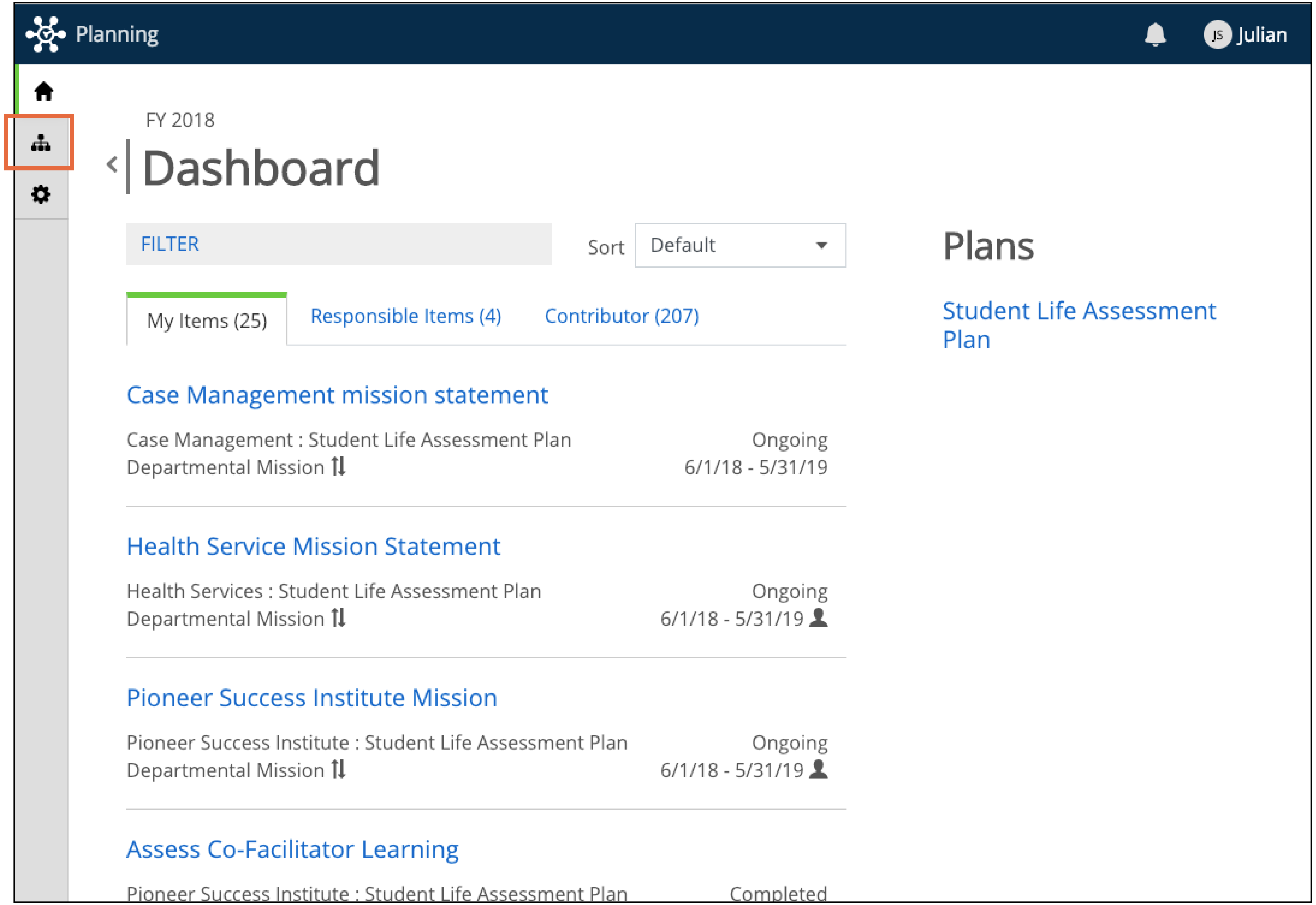
Use **Baseline** to distribute surveys through email and analyze results



Use **Planning** to track and update your department's strategic activities

The Planning dashboard displays plan items owned by the user

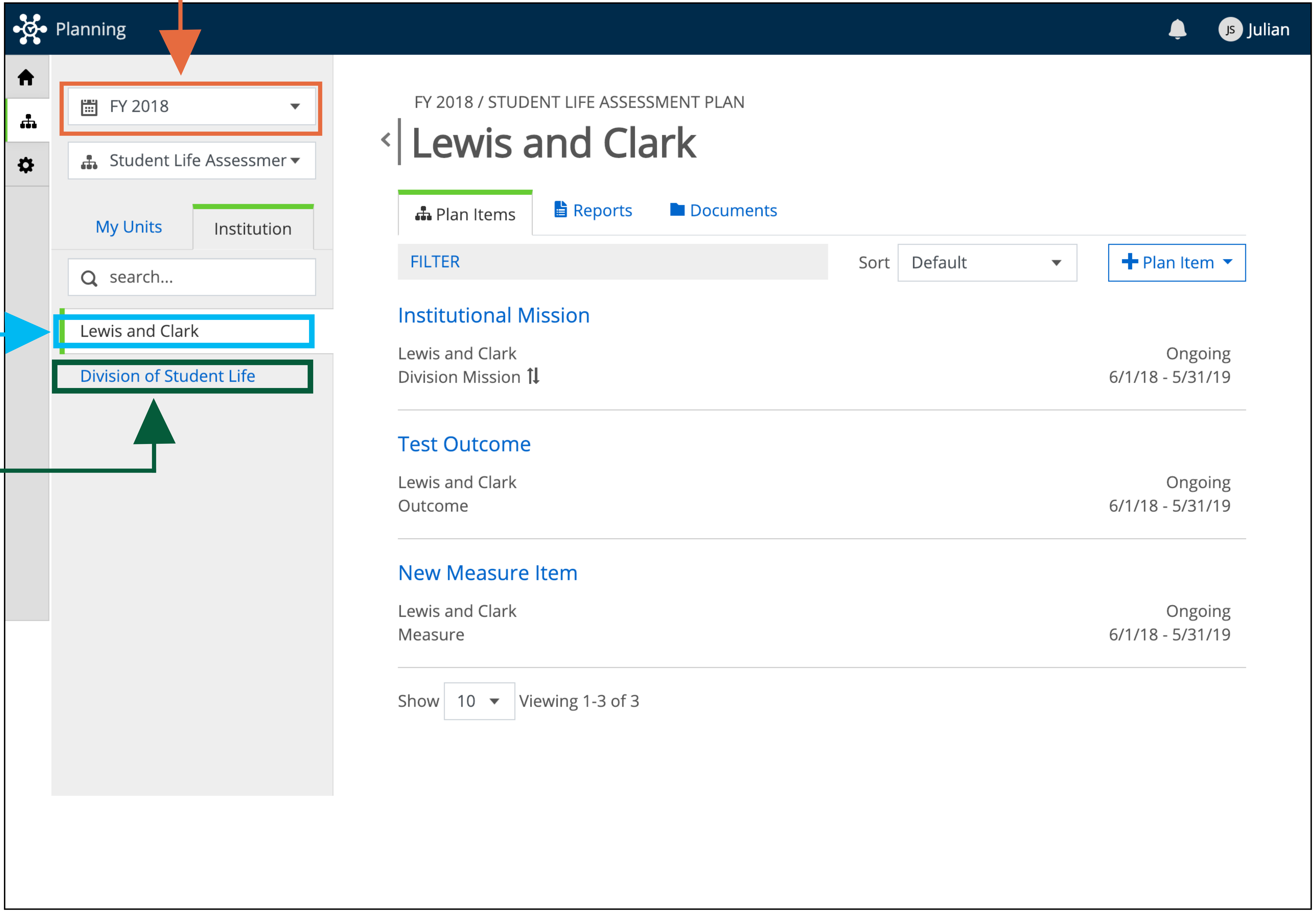
Select the **Plans** tab to access your department's plan items



1. Select the current **fiscal year**

2. Select **Lewis and Clark**

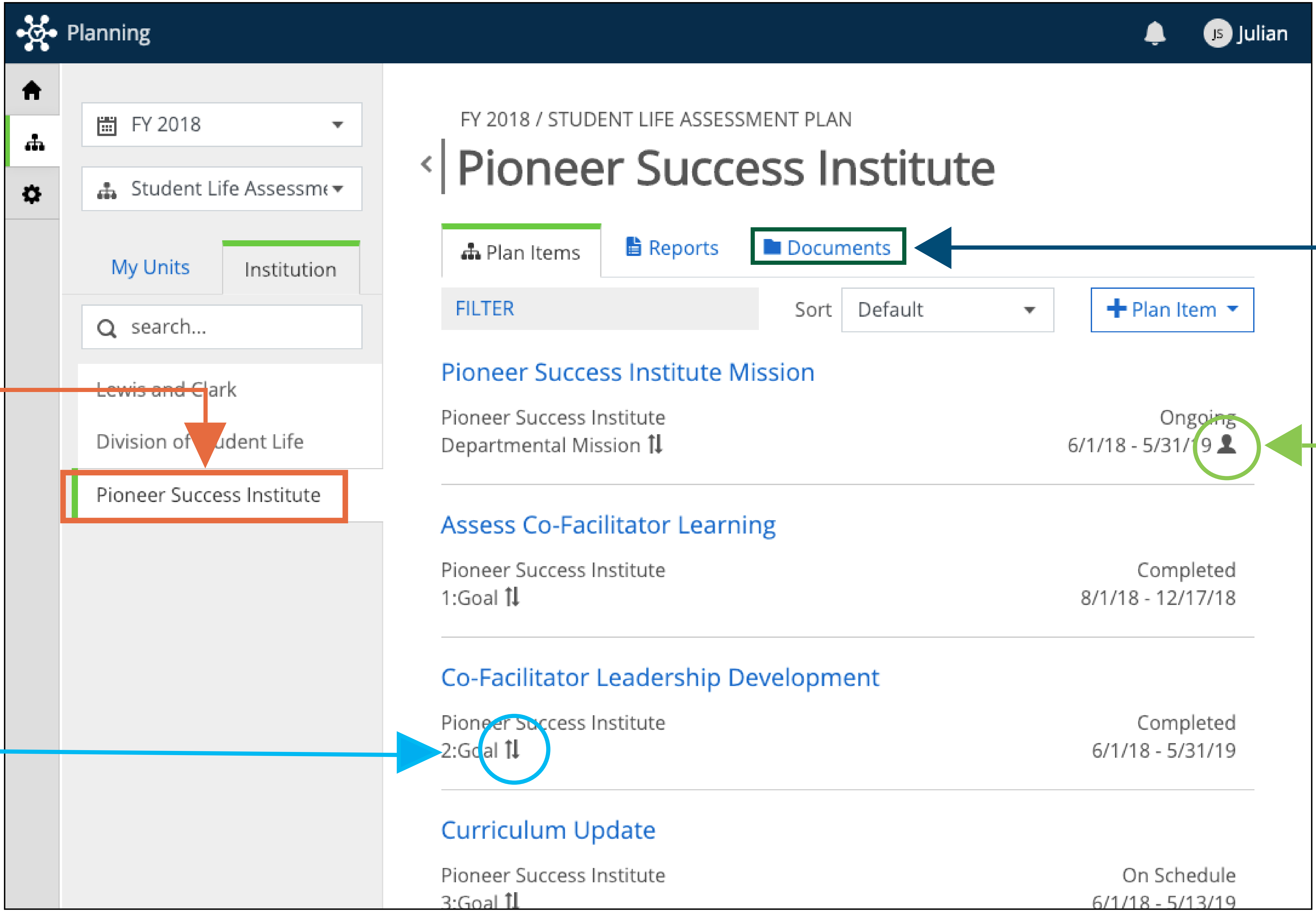
3. Select **Division of Student Life**



View your department's plan items

Select your **department**

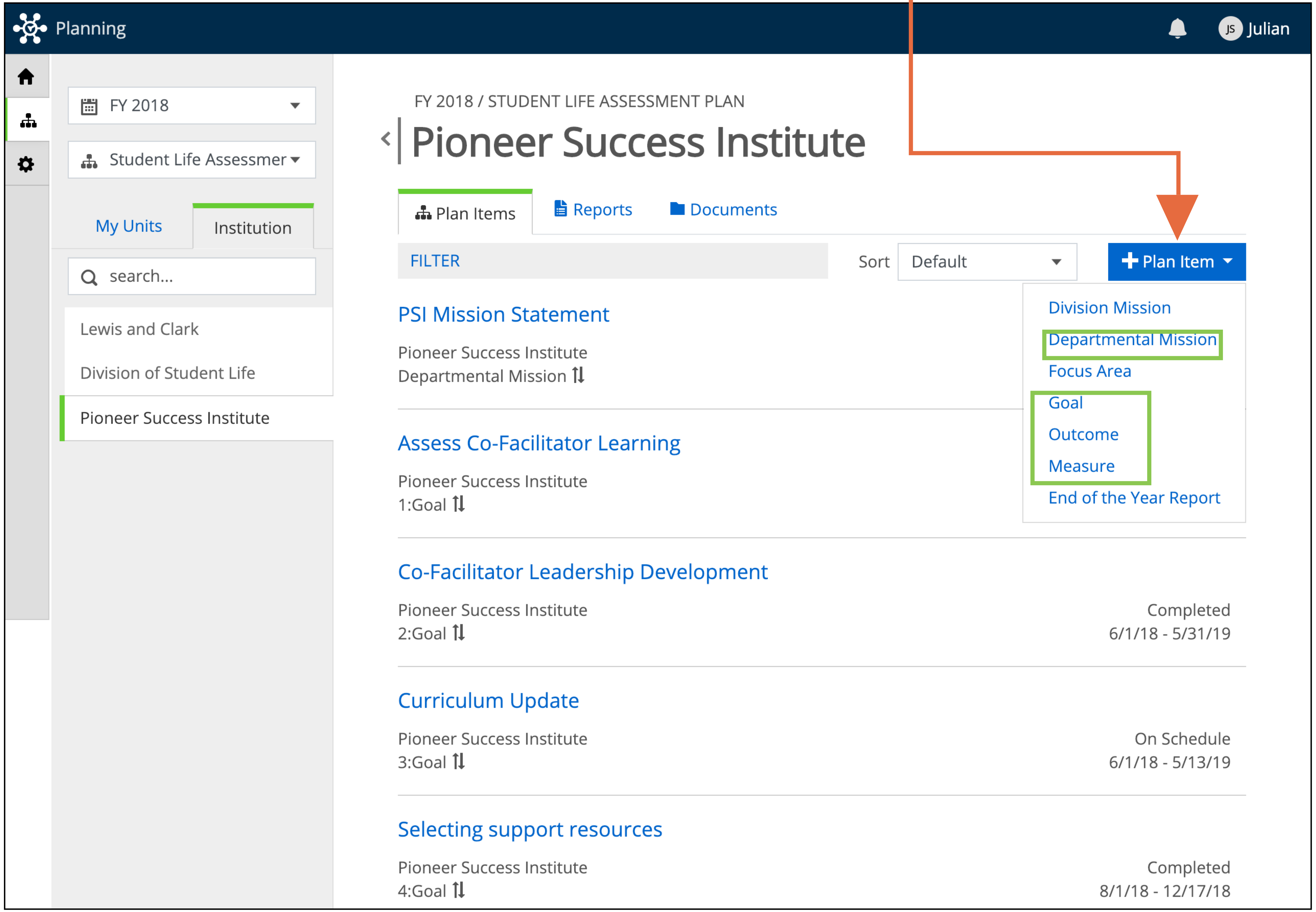
Arrow icon indicates item is connected to other item(s)



Upload **documents** here, such as interview transcripts

Person icon indicates item is assigned to a user

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



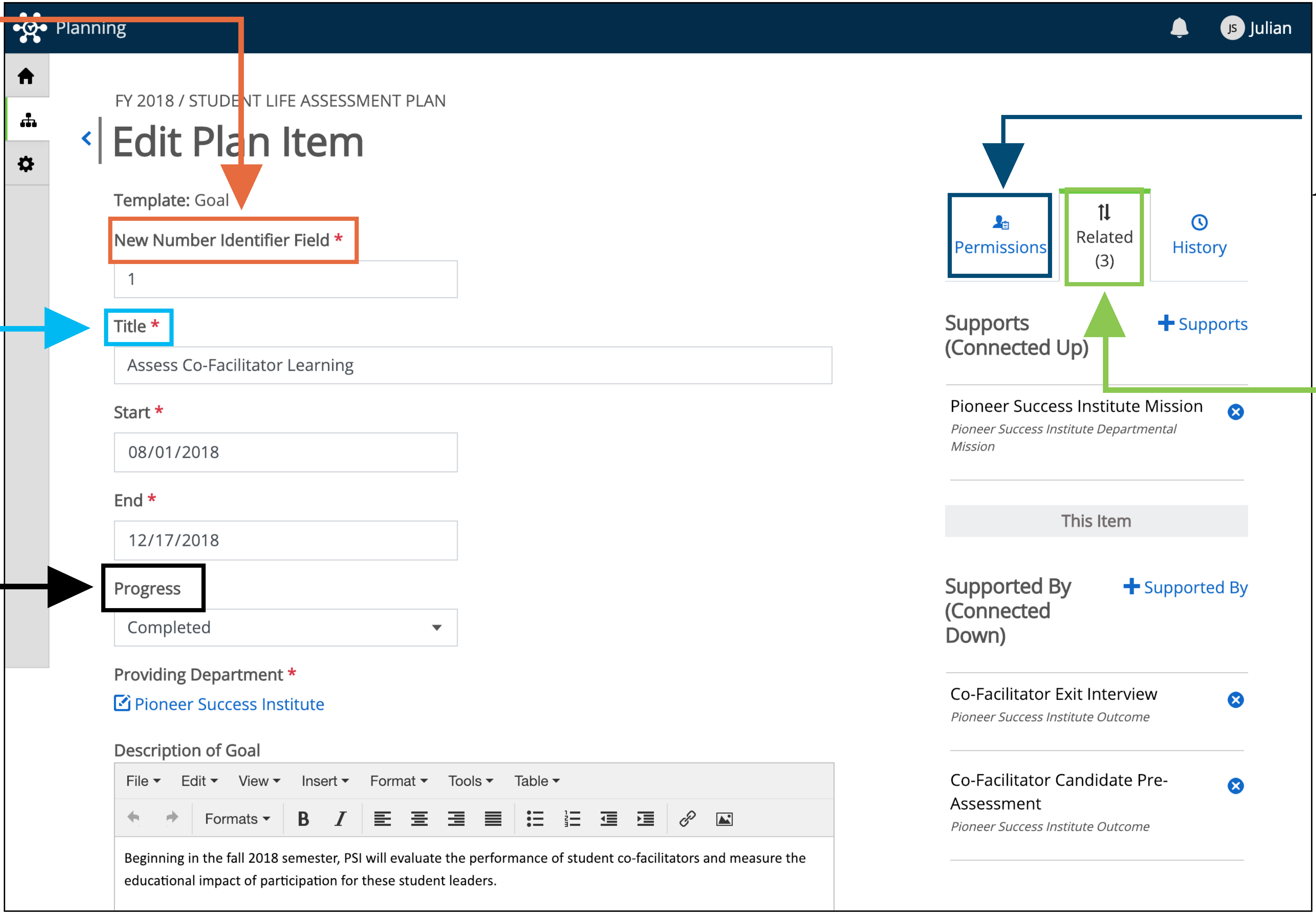
Department **mission**, **goal**, **outcome**, and **measure** are typical plan items

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



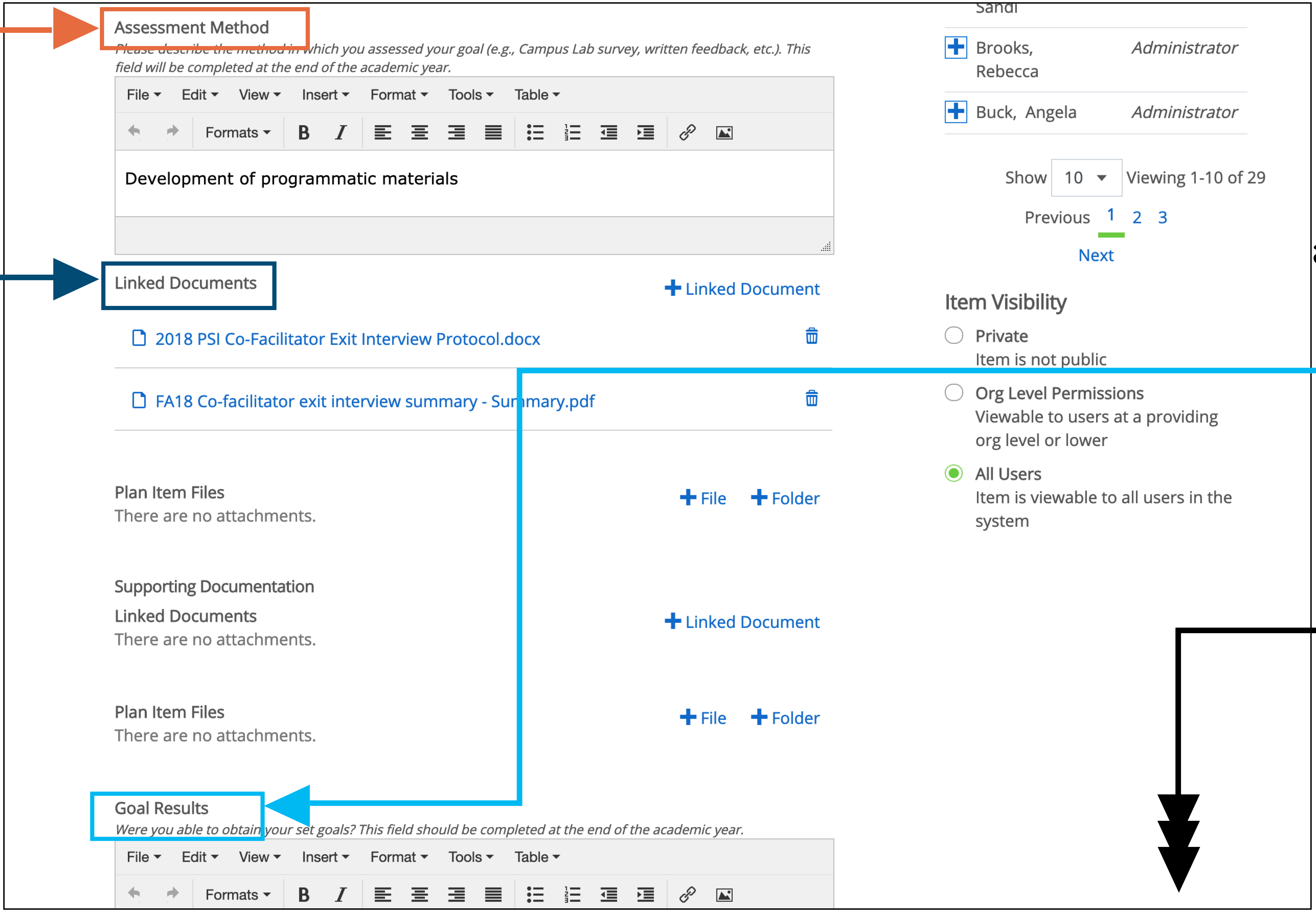
Permissions assign plan items to users. Assigned items will surface in dashboard view

Use **related** to connect to related plan items (details see pg. 9)

Fill in your plan item (pg. 1 of 2)

Define the **assessment method**

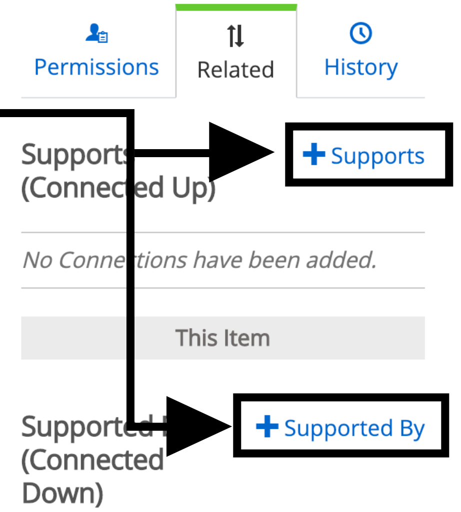
Link any relevant **documents** (see pages 16-17)



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

Scroll to bottom of page to save with “Done”

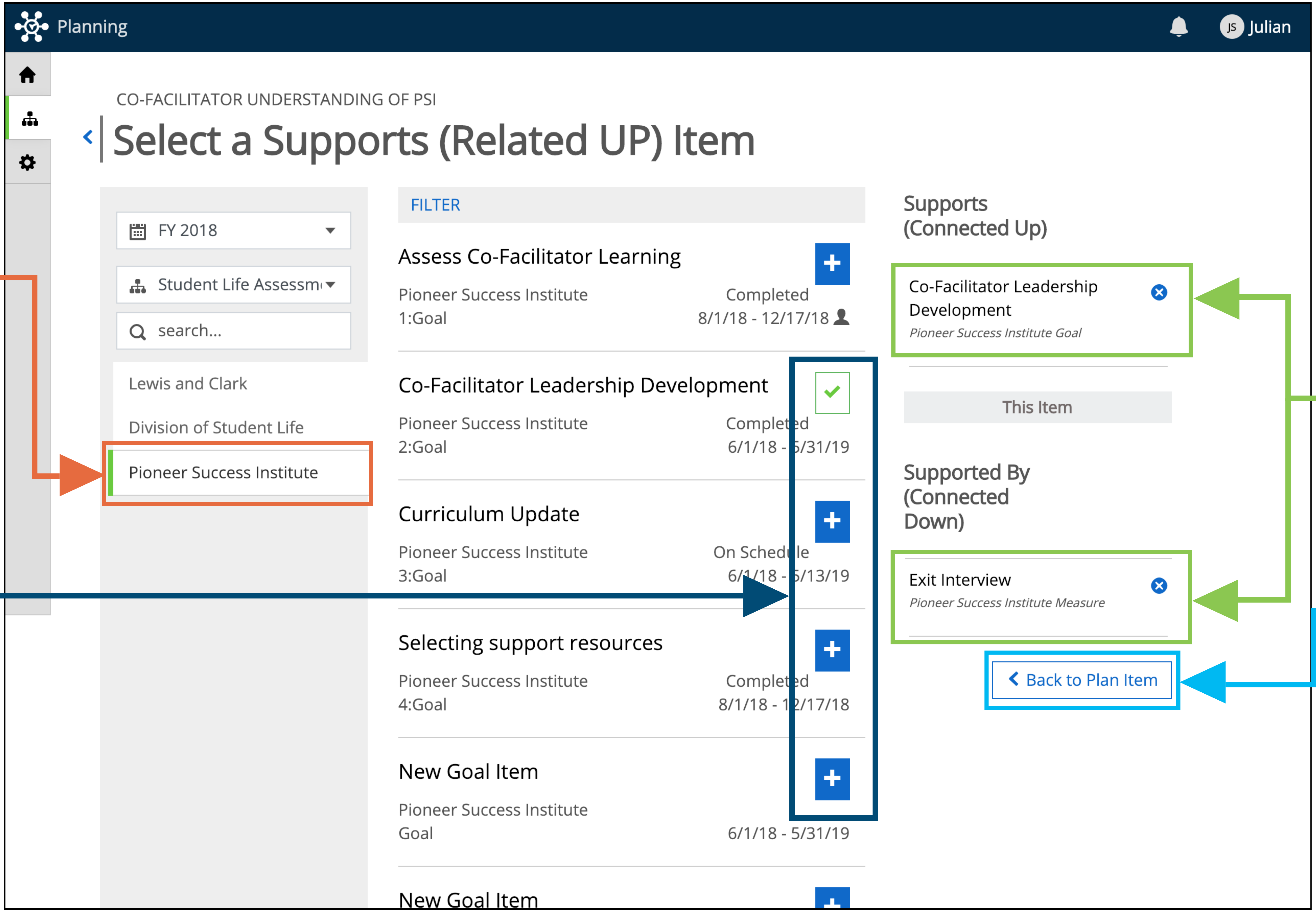
Connecting plan items: reach this page through the "related" tab in the plan item edit screen



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

2. Select appropriate **connections**

Note: items can have multiple connections either up or down



Review **current connections**

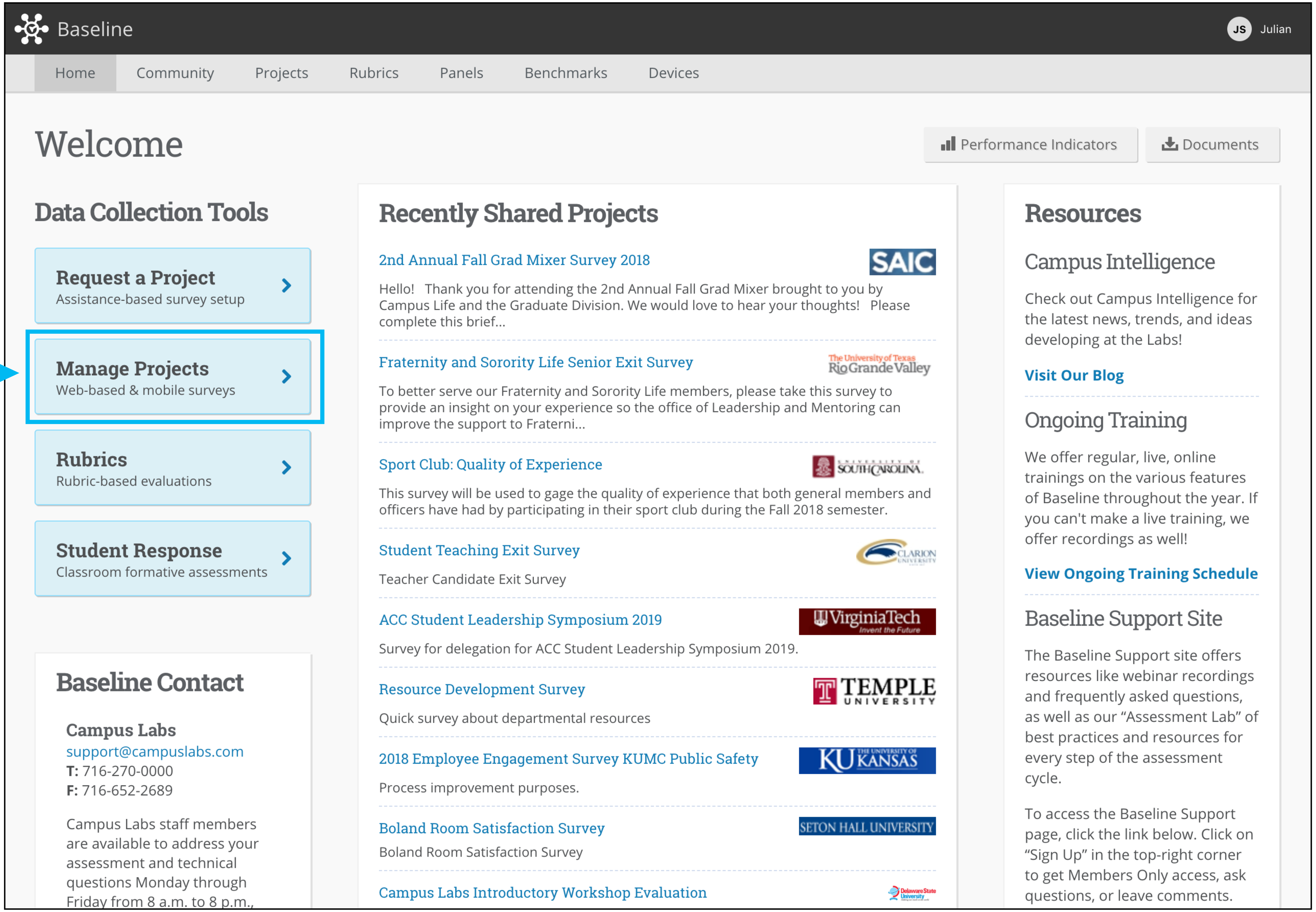
3. Click to save connections

Saving baseline survey data for export (pg. 1 of 4)

lclark.campuslabs.com/baseline

1. Begin at the baseline **homepage**

2. Click **Manage Projects**

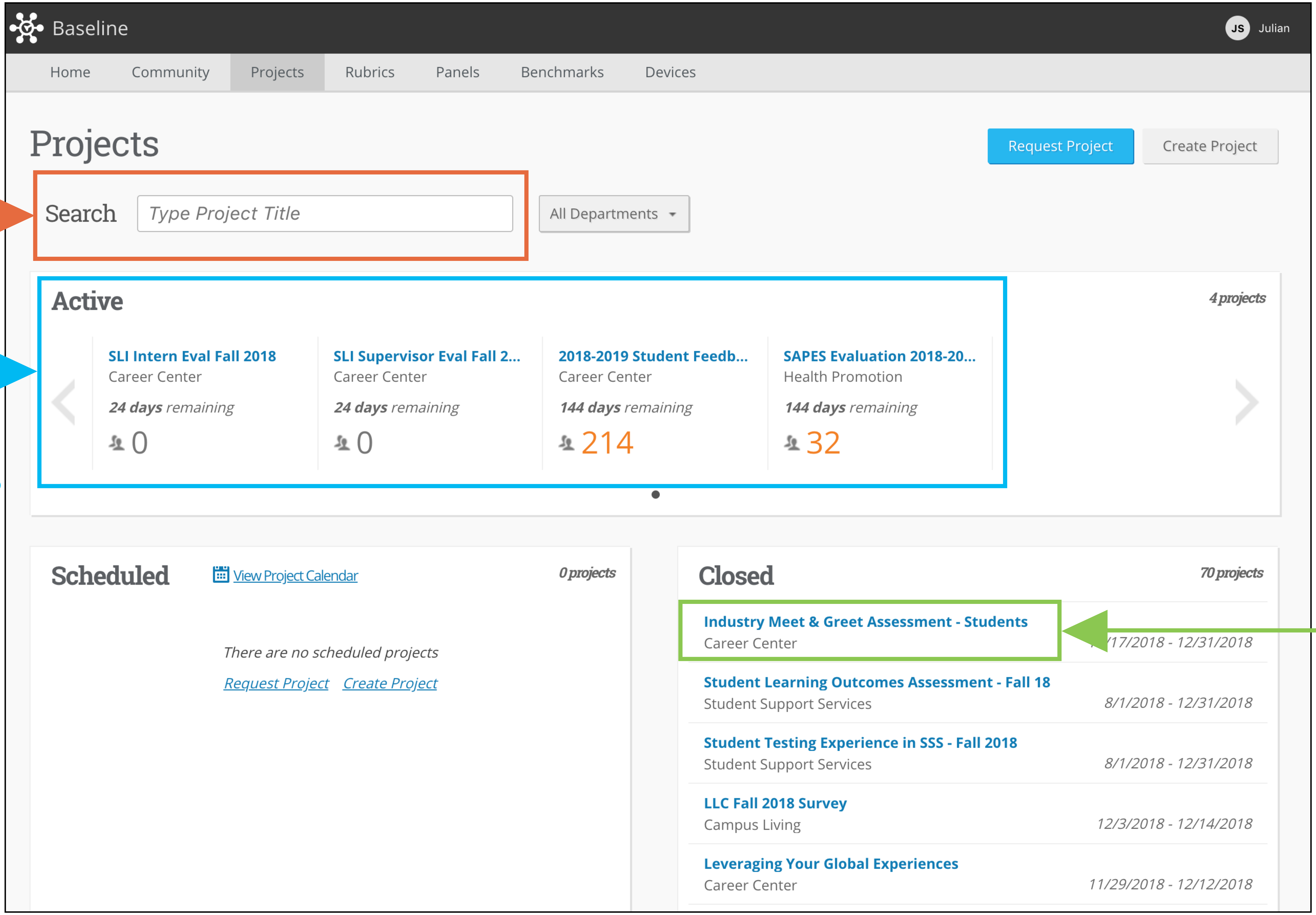


Saving baseline survey data for export (pg. 2 of 4)

3. Search for a specific project here

Active projects display here

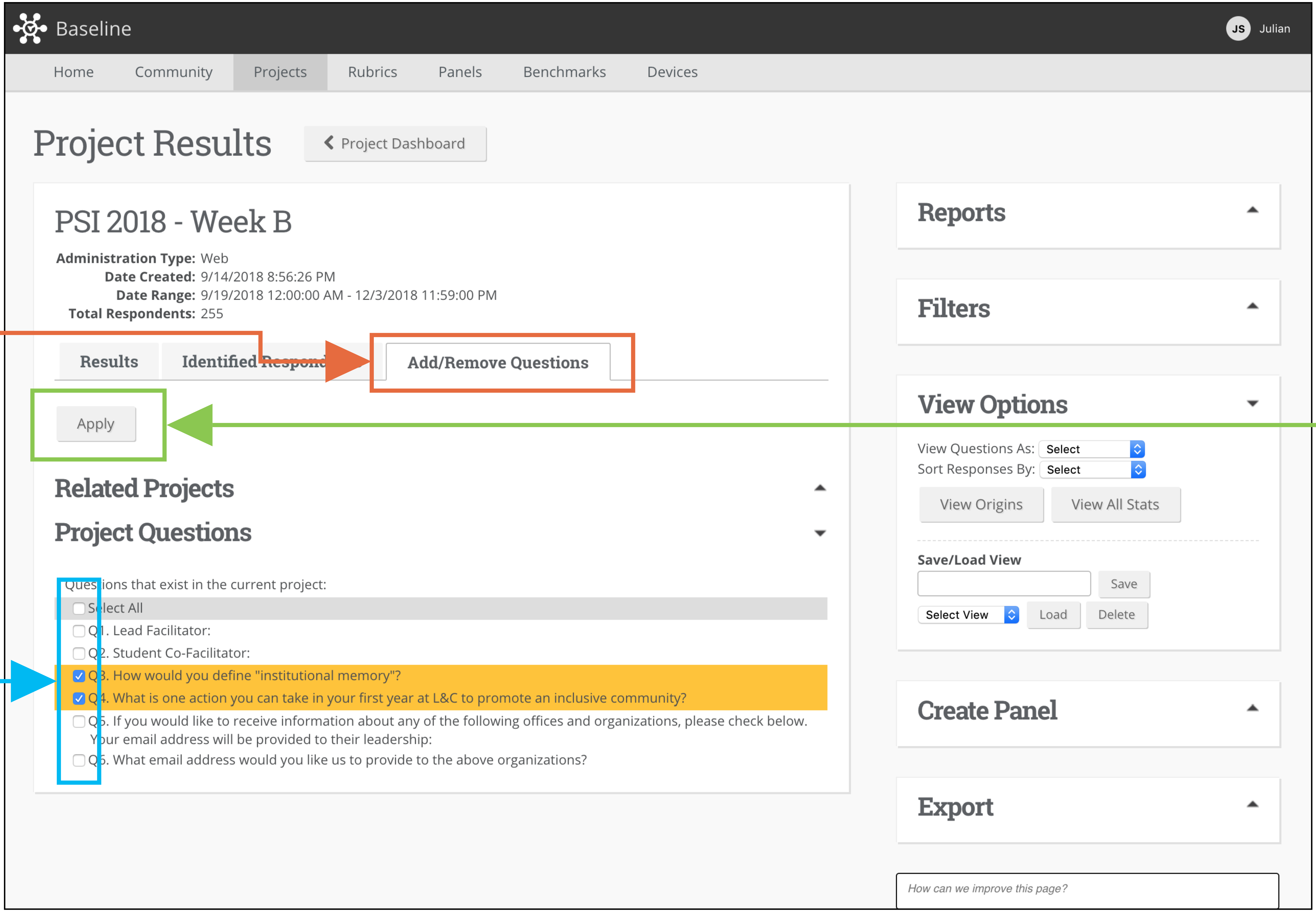
4. Click on a **project** to continue



Saving baseline survey data for export (pg. 3 of 4)

5. Click the **Add/Remove Questions** tab

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

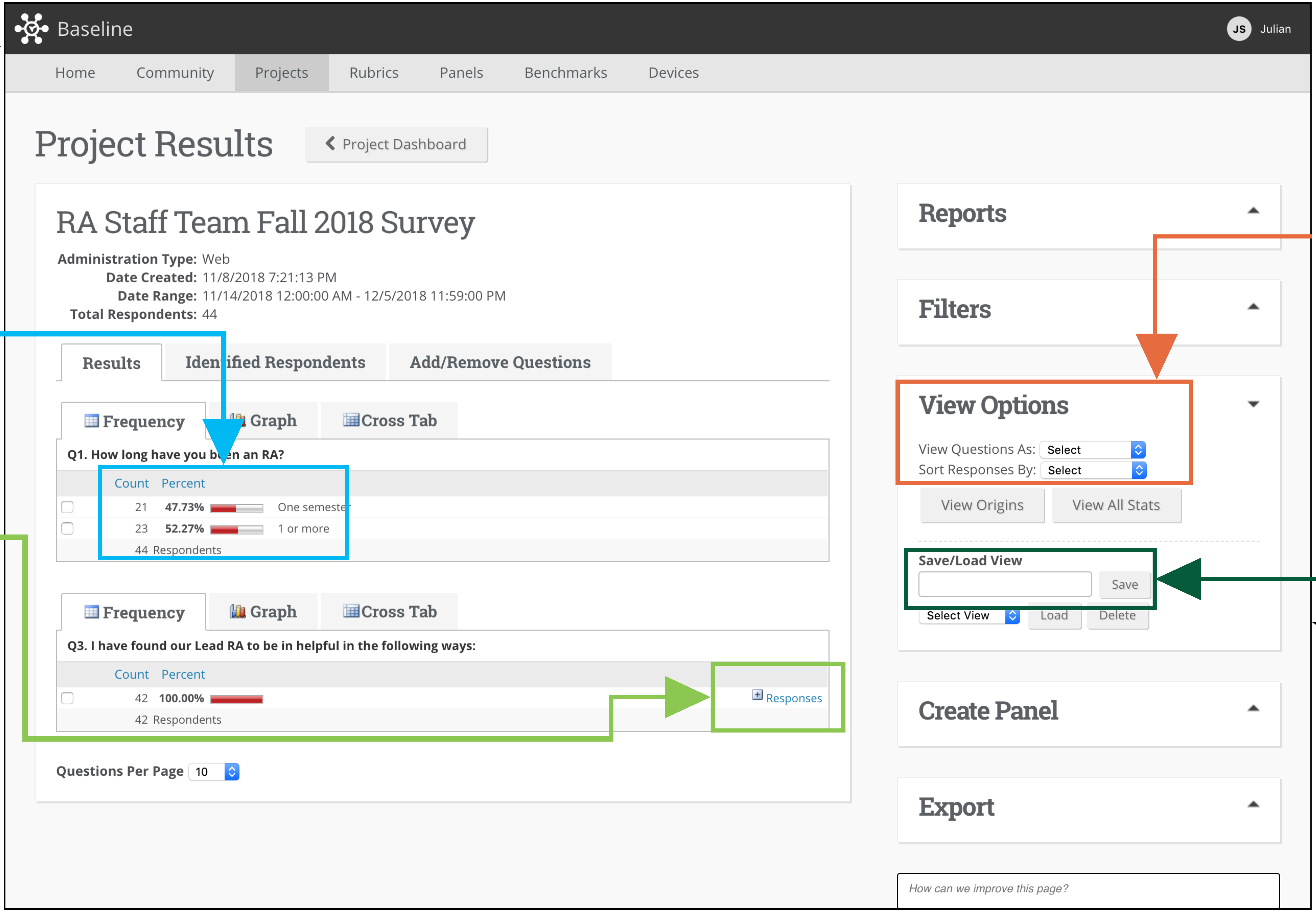


7. Click **Apply**

Saving baseline survey data for export (pg. 4 of 4)

Questions with pre-set answer selections will display **response counts**

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



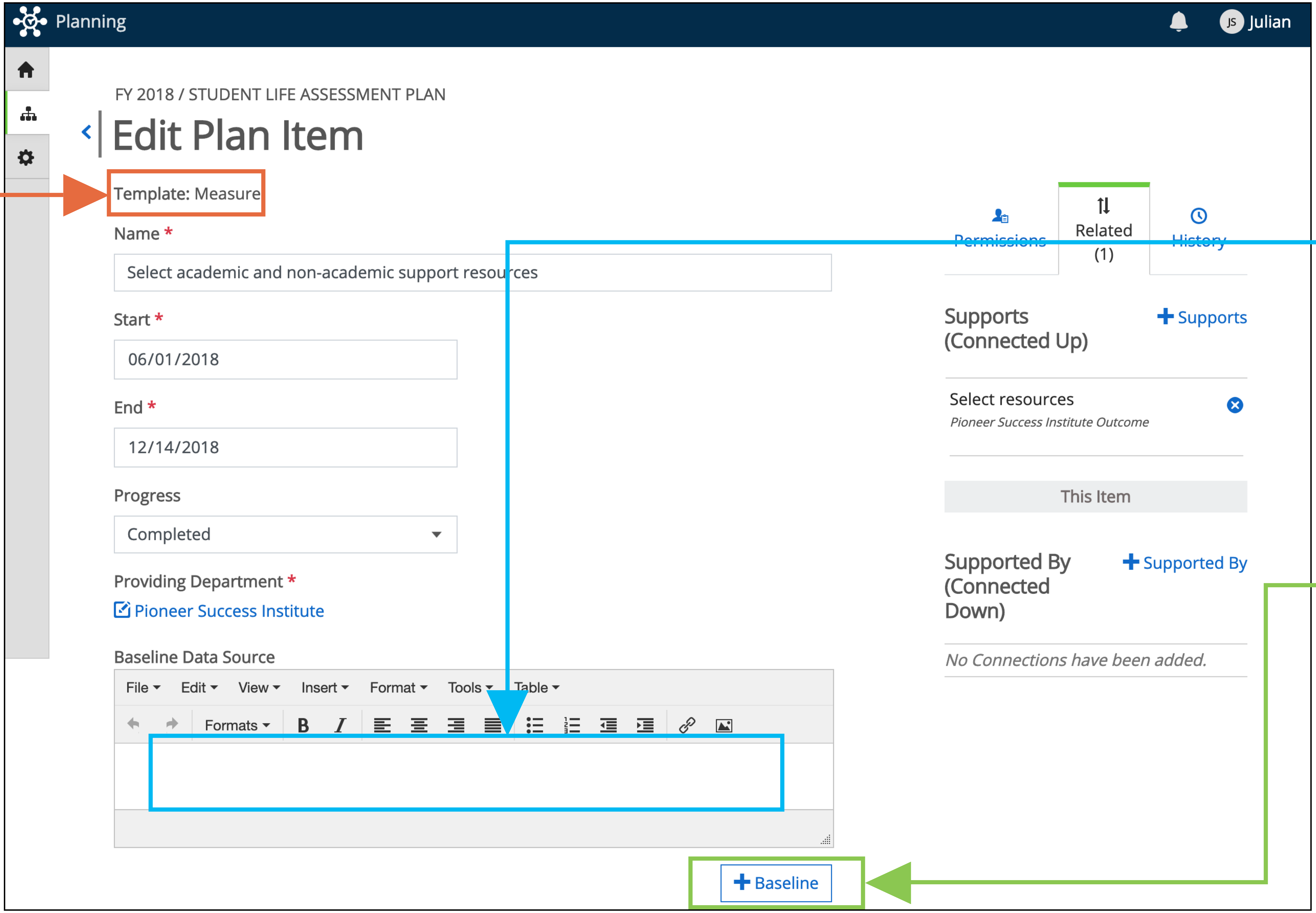
8. View options order questions and select frequency or graph display

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



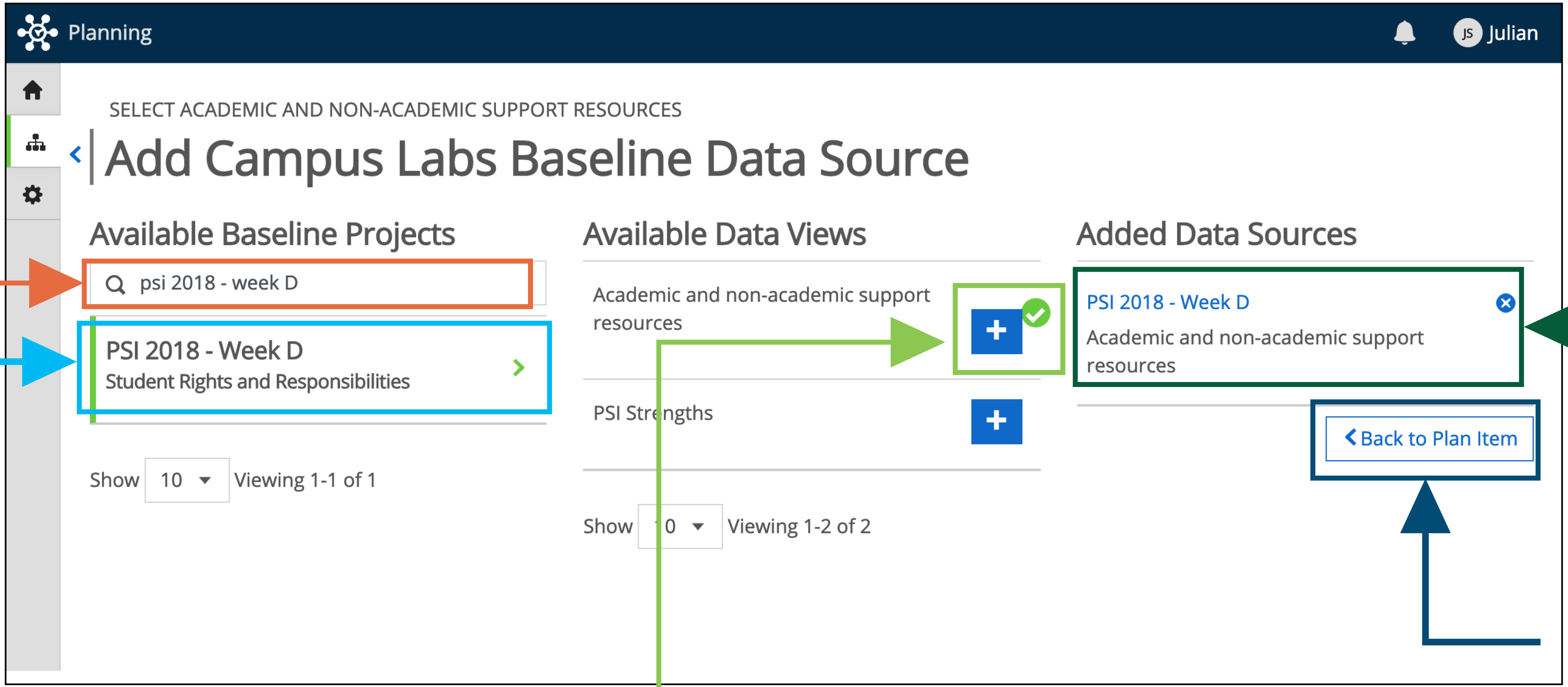
2. Provide a **descriptive name** for the data you will link

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



Selected **data sources** appear here

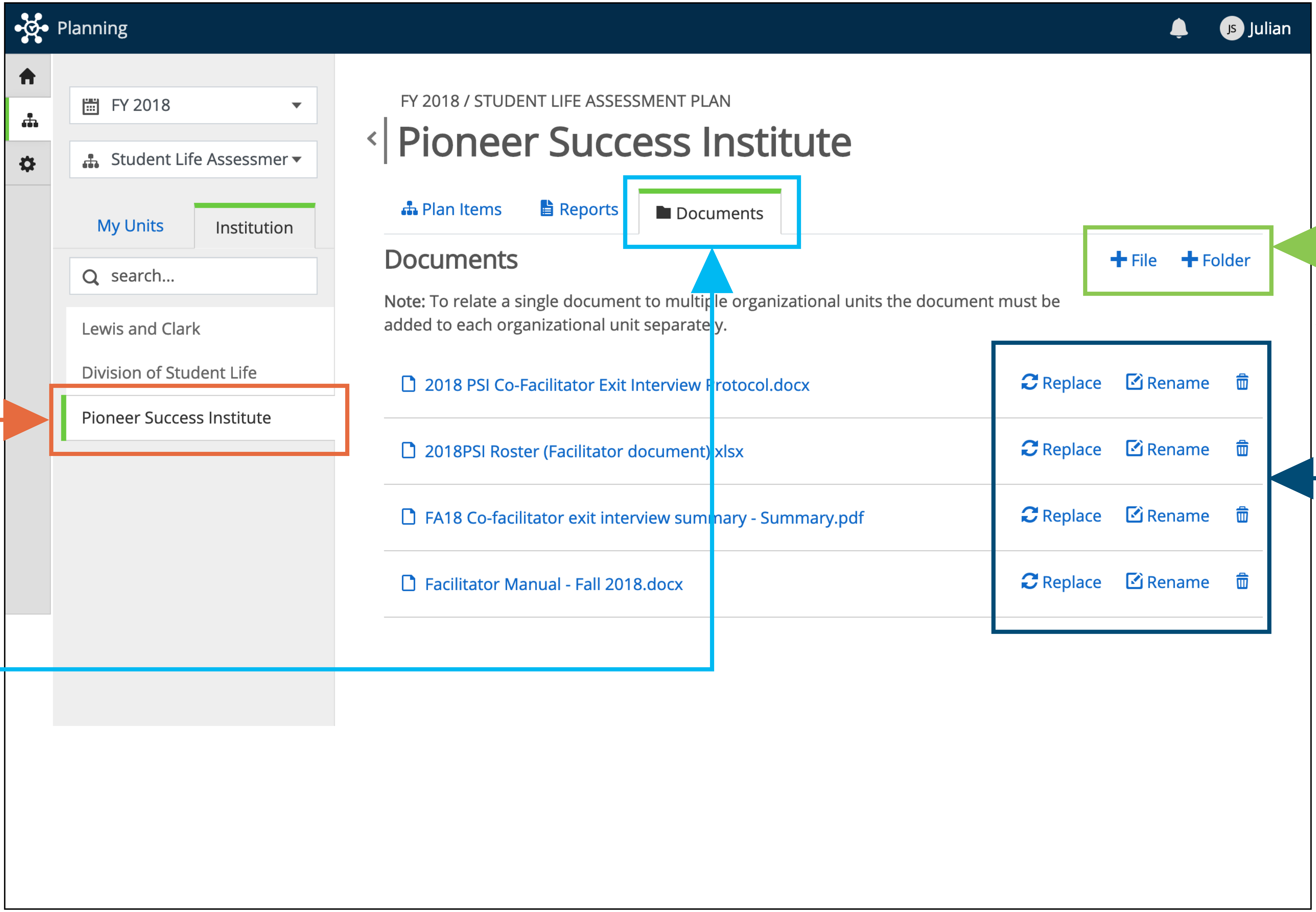
7. Click **back to plan item** to save

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

Link data to plan items, method 2: upload your own documents (pg. 1 of 2)

1. Navigate to your **department home page**

2. Select the **Documents** tab

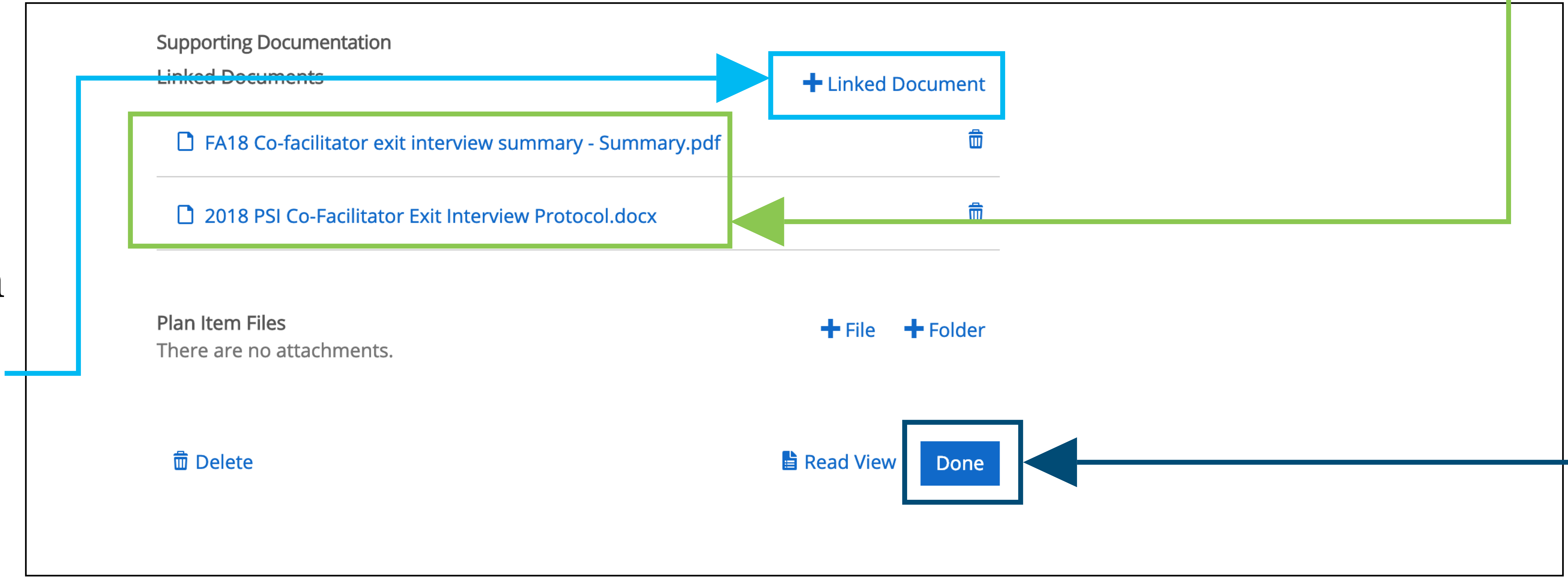


3. Upload a single **file** or a **folder**

View and edit uploaded **documents**

Link data to plan items, method 2: upload your own documents (pg. 2 of 2)

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