

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:

**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

JS Julian

campuslabs

Your Campus Labs Platform at
Lewis & Clark College

Baseline
Assess student learning and success through surveys, rubrics, and benchmarking

Compliance Assist
Connect and manage your program review and accreditation efforts

Faculty
Manage course rosters, course evaluations, and more with a personalized dashboard

Planning
Connect and manage your strategic planning efforts

? Need Help? Visit our Support Center for articles, webinars, and other resources!

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

The Planning dashboard displays plan items owned by the user

Planning

JS Julian

Home

Plans

Settings

FY 2018

< Dashboard

FILTER

Sort Default

My Items (25)

Responsible Items (4)

Contributor (207)

Case Management mission statement

Case Management : Student Life Assessment Plan
Departmental Mission ↕

Ongoing
6/1/18 - 5/31/19

Health Service Mission Statement

Health Services : Student Life Assessment Plan
Departmental Mission ↕

Ongoing
6/1/18 - 5/31/19

Pioneer Success Institute Mission

Pioneer Success Institute : Student Life Assessment Plan
Departmental Mission ↕

Ongoing
6/1/18 - 5/31/19

Assess Co-Facilitator Learning

Pioneer Success Institute : Student Life Assessment Plan

Completed

Plans

Student Life Assessment Plan

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

1. Select the current **fiscal year**

Planning

FY 2018

Student Life Assesmer

My UnitsInstitution

search...

Lewis and Clark

Division of Student Life

FY 2018 / STUDENT LIFE ASSESSMENT PLAN

Lewis and Clark

Plan ItemsReportsDocuments

FILTERSort Default+ Plan Item

Institutional Mission

Lewis and Clark
Division Mission

Ongoing
6/1/18 - 5/31/19

Test Outcome

Lewis and Clark
Outcome

Ongoing
6/1/18 - 5/31/19

New Measure Item

Lewis and Clark
Measure

Ongoing
6/1/18 - 5/31/19

Show 10 Viewing 1-3 of 3

2. Select **Lewis and Clark**

3. Select **Division of Student Life**

View your department's plan items

Planning

JS Julian

Home

Organization

Settings

FY 2018

Student Life Assessment

My Units

Institution

search...

Lewis and Clark

Division of Student Life

Pioneer Success Institute

FY 2018 / STUDENT LIFE ASSESSMENT PLAN

< Pioneer Success Institute

Plan Items

Reports

Documents

FILTER

Sort Default

+ Plan Item

Pioneer Success Institute Mission

Pioneer Success Institute
Departmental Mission ⬆⬆

Ongoing
6/1/18 - 5/31/19

Assess Co-Facilitator Learning

Pioneer Success Institute
1:Goal ⬆⬆

Completed
8/1/18 - 12/17/18

Co-Facilitator Leadership Development

Pioneer Success Institute
2:Goal ⬆⬆

Completed
6/1/18 - 5/31/19

Curriculum Update

Pioneer Success Institute
3:Goal ⬆⬆

On Schedule
6/1/18 - 5/13/19

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**

Planning

JS Julian

Home

Organization

Settings

FY 2018

Student Life Assesmer

My Units

Institution

search...

Lewis and Clark

Division of Student Life

Pioneer Success Institute

FY 2018 / STUDENT LIFE ASSESSMENT PLAN

< Pioneer Success Institute

Plan Items

Reports

Documents

FILTER

Sort Default

+ Plan Item

PSI Mission Statement

Pioneer Success Institute

Departmental Mission ↑↓

Assess Co-Facilitator Learning

Pioneer Success Institute

1:Goal ↑↓

Co-Facilitator Leadership Development

Pioneer Success Institute

2:Goal ↑↓

Completed

6/1/18 - 5/31/19

Curriculum Update

Pioneer Success Institute

3:Goal ↑↓

On Schedule

6/1/18 - 5/13/19

Selecting support resources

Pioneer Success Institute

4:Goal ↑↓

Completed

8/1/18 - 12/17/18

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

6

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

Planning

JS Julian

Home

Grid

Settings

FY 2018 / STUDENT LIFE ASSESSMENT PLAN

< Edit Plan Item

Template: Goal

New Number Identifier Field *

1

Title *

Assess Co-Facilitator Learning

Start *

08/01/2018

End *

12/17/2018

Progress

Completed

Providing Department *

☒ Pioneer Success Institute

Description of Goal

File Edit View Insert Format Tools Table

← → Formats **B** *I* [List Icons] [Link Icon] [Image Icon]

Beginning in the fall 2018 semester, PSI will evaluate the performance of student co-facilitators and measure the educational impact of participation for these student leaders.

Permissions

Related (3)

History

Supports (Connected Up)

+ Supports

Pioneer Success Institute Mission

Pioneer Success Institute Departmental Mission

This Item

Supported By (Connected Down)

+ Supported By

Co-Facilitator Exit Interview

Pioneer Success Institute Outcome

Co-Facilitator Candidate Pre-Assessment

Pioneer Success Institute Outcome

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

Assessment Method

Please describe the method in which you assessed your goal (e.g., Campus Lab survey, written feedback, etc.). This field will be completed at the end of the academic year.

File Edit View Insert Format Tools Table

← → Formats B I [text alignment icons] [list icons] [link icon] [image icon]

Development of programmatic materials

Linked Documents

+ Linked Document

2018 PSI Co-Facilitator Exit Interview Protocol.docx

FA18 Co-facilitator exit interview summary - Summary.pdf

Plan Item Files
There are no attachments.

Supporting Documentation
Linked Documents
There are no attachments.

Plan Item Files
There are no attachments.

Goal Results

Were you able to obtain your set goals? This field should be completed at the end of the academic year.

File Edit View Insert Format Tools Table

← → Formats B I [text alignment icons] [list icons] [link icon] [image icon]

Sandi

+ Brooks, Rebecca Administrator

+ Buck, Angela Administrator

Show 10 Viewing 1-10 of 29

Previous 1 2 3 Next

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

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

Supports (Connected Up) [+ Supports](#)

No Connections have been added.

This Item

Supported (Connected Down) [+ Supported By](#)

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

2. Select appropriate connections

Note: items can have multiple connections either up or down

Planning

CO-FACILITATOR UNDERSTANDING OF PSI

Select a Supports (Related UP) Item

FY 2018

Student Life Assessment

search...

Lewis and Clark

Division of Student Life

Pioneer Success Institute

FILTER

Assess Co-Facilitator Learning

Pioneer Success Institute

1:Goal

Completed

8/1/18 - 12/17/18

+

Co-Facilitator Leadership Development

Pioneer Success Institute

2:Goal

Completed

6/1/18 - 5/31/19

✓

Curriculum Update

Pioneer Success Institute

3:Goal

On Schedule

6/1/18 - 5/13/19

+

Selecting support resources

Pioneer Success Institute

4:Goal

Completed

8/1/18 - 12/17/18

+

New Goal Item

Pioneer Success Institute

Goal

6/1/18 - 5/31/19

+

New Goal Item

+

Supports (Connected Up)

Co-Facilitator Leadership Development

Pioneer Success Institute Goal

This Item

Supported By (Connected Down)

Exit Interview

Pioneer Success Institute Measure

Back to Plan Item

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

Baseline JS Julian

Home Community Projects Rubrics Panels Benchmarks Devices

Welcome

Performance Indicators Documents

Data Collection Tools

- Request a Project**
Assistance-based survey setup
- Manage Projects**
Web-based & mobile surveys
- Rubrics**
Rubric-based evaluations
- Student Response**
Classroom formative assessments

Baseline Contact

Campus Labs
support@campuslabs.com
T: 716-270-0000
F: 716-652-2689

Campus Labs staff members are available to address your assessment and technical questions Monday through Friday from 8 a.m. to 8 p.m.,

Recently Shared Projects

- 2nd Annual Fall Grad Mixer Survey 2018** SAIC
Hello! Thank you for attending the 2nd Annual Fall Grad Mixer brought to you by Campus Life and the Graduate Division. We would love to hear your thoughts! Please complete this brief...
- Fraternity and Sorority Life Senior Exit Survey** The University of Texas Rio Grande Valley
To better serve our Fraternity and Sorority Life members, please take this survey to provide an insight on your experience so the office of Leadership and Mentoring can improve the support to Fraterni...
- Sport Club: Quality of Experience** UNIVERSITY OF SOUTH CAROLINA
This survey will be used to gage the quality of experience that both general members and officers have had by participating in their sport club during the Fall 2018 semester.
- Student Teaching Exit Survey** CLARION UNIVERSITY
Teacher Candidate Exit Survey
- ACC Student Leadership Symposium 2019** VirginiaTech
Survey for delegation for ACC Student Leadership Symposium 2019.
- Resource Development Survey** TEMPLE UNIVERSITY
Quick survey about departmental resources
- 2018 Employee Engagement Survey KUMC Public Safety** KU KANSAS
Process improvement purposes.
- Boland Room Satisfaction Survey** SETON HALL UNIVERSITY
Boland Room Satisfaction Survey
- Campus Labs Introductory Workshop Evaluation** Delaware State University

Resources

Campus Intelligence

Check out Campus Intelligence for the latest news, trends, and ideas developing at the Labs!

[Visit Our Blog](#)

Ongoing Training

We offer regular, live, online trainings on the various features of Baseline throughout the year. If you can't make a live training, we offer recordings as well!

[View Ongoing Training Schedule](#)

Baseline Support Site

The Baseline Support site offers resources like webinar recordings and frequently asked questions, as well as our "Assessment Lab" of best practices and resources for every step of the assessment cycle.

To access the Baseline Support page, click the link below. Click on "Sign Up" in the top-right corner to get Members Only access, ask questions, or leave comments.

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

3. Search for a specific project here

Active projects display here

Baseline

JS Julian

HomeCommunityProjectsRubricsPanelsBenchmarksDevices

Projects

Request ProjectCreate Project

Search

Type Project Title

All Departments

Active

4 projects

SLI Intern Eval Fall 2018

Career Center

24 days remaining

0

SLI Supervisor Eval Fall 2...

Career Center

24 days remaining

0

2018-2019 Student Feedb...

Career Center

144 days remaining

214

SAPES Evaluation 2018-20...

Health Promotion

144 days remaining

32

Scheduled

View Project Calendar

0 projects

There are no scheduled projects

[Request Project](#) [Create Project](#)

Closed

70 projects

Industry Meet & Greet Assessment - Students

Career Center

11/17/2018 - 12/31/2018

Student Learning Outcomes Assessment - Fall 18

Student Support Services

8/1/2018 - 12/31/2018

Student Testing Experience in SSS - Fall 2018

Student Support Services

8/1/2018 - 12/31/2018

LLC Fall 2018 Survey

Campus Living

12/3/2018 - 12/14/2018

Leveraging Your Global Experiences

Career Center

11/29/2018 - 12/12/2018

4. Click on a project to continue

11

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**

The screenshot shows the 'Baseline' application interface. The top navigation bar includes 'Home', 'Community', 'Projects' (selected), 'Rubrics', 'Panels', 'Benchmarks', and 'Devices'. The user 'JS Julian' is logged in. The main section is titled 'Project Results' with a 'Project Dashboard' link. Below this, the project details for 'PSI 2018 - Week B' are shown, including 'Administration Type: Web', 'Date Created: 9/14/2018 8:56:26 PM', 'Date Range: 9/19/2018 12:00:00 AM - 12/3/2018 11:59:00 PM', and 'Total Respondents: 255'. The 'Add/Remove Questions' tab is selected, and the 'Apply' button is highlighted. The 'Project Questions' section lists several questions, with Q3 and Q4 selected. The right sidebar contains sections for 'Reports', 'Filters', 'View Options' (with dropdowns for 'View Questions As' and 'Sort Responses By'), 'Save/Load View' (with 'Save', 'Load', and 'Delete' buttons), 'Create Panel', and 'Export'. A feedback box at the bottom asks 'How can we improve this page?'.

Baseline

JS Julian

Home Community **Projects** Rubrics Panels Benchmarks Devices

Project Results [Project Dashboard](#)

PSI 2018 - Week B

Administration Type: Web
Date Created: 9/14/2018 8:56:26 PM
Date Range: 9/19/2018 12:00:00 AM - 12/3/2018 11:59:00 PM
Total Respondents: 255

Results **Identified Responses** **Add/Remove Questions**

Apply

Related Projects

Project Questions

Questions that exist in the current project:

☐ Select All

☐ Q1. Lead Facilitator:

☐ Q2. Student Co-Facilitator:

☒ Q3. How would you define "institutional memory"?

☒ Q4. What is one action you can take in your first year at L&C to promote an inclusive community?

☐ Q5. If you would like to receive information about any of the following offices and organizations, please check below.
Your email address will be provided to their leadership:

☐ Q6. What email address would you like us to provide to the above organizations?

Reports

Filters

View Options

View Questions As: **Select**

Sort Responses By: **Select**

View Origins **View All Stats**

Save/Load View

Save

Select View **Load** **Delete**

Create Panel

Export

How can we improve this page?

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

Baseline

JS Julian

Home Community Projects Rubrics Panels Benchmarks Devices

Project Results [Project Dashboard](#)

RA Staff Team Fall 2018 Survey

Administration Type: Web
Date Created: 11/8/2018 7:21:13 PM
Date Range: 11/14/2018 12:00:00 AM - 12/5/2018 11:59:00 PM
Total Respondents: 44

Results Identified Respondents Add/Remove Questions

Frequency Graph Cross Tab

Q1. How long have you been an RA?

	Count	Percent	
<input type="checkbox"/>	21	47.73%	One semester
<input type="checkbox"/>	23	52.27%	1 or more
44 Respondents			

Frequency Graph Cross Tab

Q3. I have found our Lead RA to be in helpful in the following ways:

	Count	Percent	
<input type="checkbox"/>	42	100.00%	
42 Respondents			

Questions Per Page 10

Responses

View Options

View Questions As: Select
Sort Responses By: Select

View Origins View All Stats

Save/Load View

Select View Load Delete

Create Panel

Export

How can we improve this page?

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

Planning

FY 2018 / STUDENT LIFE ASSESSMENT PLAN

Edit Plan Item

Template: Measure

Name *

Select academic and non-academic support resources

Start *

06/01/2018

End *

12/14/2018

Progress

Completed

Providing Department *

☒ Pioneer Success Institute

Baseline Data Source

File Edit View Insert Format Tools Table

Formats B I

+ Baseline

Permissions Related (1) History

Supports (Connected Up) + Supports

Select resources

Pioneer Success Institute Outcome

This Item

Supported By (Connected Down) + Supported By

No Connections have been added.

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

The screenshot shows a web interface titled 'Add Campus Labs Baseline Data Source' under the 'Planning' header. The interface is divided into three main sections: 'Available Baseline Projects', 'Available Data Views', and 'Added Data Sources'. In the 'Available Baseline Projects' section, a search bar contains 'psi 2018 - week D', and a result 'PSI 2018 - Week D' with the subtitle 'Student Rights and Responsibilities' is highlighted with a blue border and a green arrow. In the 'Available Data Views' section, 'Academic and non-academic support resources' is highlighted with a green border and a green arrow, and its corresponding plus icon is also highlighted. In the 'Added Data Sources' section, 'PSI 2018 - Week D' is listed with the subtitle 'Academic and non-academic support resources', and a green arrow points from the highlighted data view to this entry. A blue button labeled '< Back to Plan Item' is located below the added data sources. The interface also includes a sidebar with navigation icons and a top bar with a user profile 'JS Julian'.

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

Planning

FY 2018

Student Life Assesmmer

My Units

Institution

search...

Lewis and Clark

Division of Student Life

Pioneer Success Institute

FY 2018 / STUDENT LIFE ASSESSMENT PLAN

<| Pioneer Success Institute

Plan Items

Reports

Documents

Documents

Note: To relate a single document to multiple organizational units the document must be added to each organizational unit separately.

2018 PSI Co-Facilitator Exit Interview Protocol.docx

2018PSI Roster (Facilitator document).xlsx

FA18 Co-facilitator exit interview summary - Summary.pdf

Facilitator Manual - Fall 2018.docx

+ File + Folder

Replace Rename

Replace Rename

Replace Rename

Replace Rename

- 3. Upload a single file or a folder
- View and edit uploaded documents

16

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

The screenshot shows the 'Edit Plan Item' interface for 'FY 2018 / STUDENT LIFE ASSESSMENT PLAN'. The page title is 'Edit Plan Item'. On the left sidebar, the 'Template: Outcome' is selected, highlighted with an orange box and an orange arrow pointing to it from the instruction '4. Edit the plan item you wish to link to'. Below this, a 'Number Identifier Field *' is shown with a text input containing '1a'. To the right of the main content area, there are tabs for 'Permissions', 'Related (2)', and 'History'. Below these tabs, there is a 'Supports' section with a '+ Supports' button. A large black arrow points from the 'Template: Outcome' section down to the 'Supporting Documentation' section. The 'Supporting Documentation' section has a 'Linked Documents' header. Below it, there are two document entries: 'FA18 Co-facilitator exit interview summary - Summary.pdf' and '2018 PSI Co-Facilitator Exit Interview Protocol.docx'. A blue box highlights the '+ Linked Document' button, with a blue arrow pointing to it from the instruction '5. Scroll down to the linked document button'. A green box highlights the two document entries, with a green arrow pointing to it from the instruction '6. Select the appropriate document(s)'. At the bottom of the page, there is a 'Plan Item Files' section with the text 'There are no attachments.' and buttons for '+ File', '+ Folder', 'Delete', 'Read View', and 'Done'. A blue arrow points from the 'Done' button to the instruction '7. Click Done to save'.

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

7. Click **Done** to save