Steps for Completing 2020 Effectiveness Reports

(This report will be a reflection on assessment activities for the 2019-2020 academic year.)

Note: If you would like to reference your submissions from last year, you may generate a report in Campus Labs' AU Planning to see last year's submissions using the "Report" tab, highlighting the name of your department in the org. chart, and selecting "View Report" below a report titled "2018-2019 Division of Student Affairs Assessment Report."

Step 1: Log-in to AU Planning from the A&SP website using your AU username and password http://assessment.auburn.edu/software/

Step 3: Click on the "Plans" button (2nd button under the house icon) at the top left of the screen.

Step 4: Select "2019-2020" from the first drop-down menu on the top left of the screen.

Step 5: Select "Student Affairs Strategic Plan" from the second drop-down menu.

Step 6: Select "Senior Vice President for Student Affairs" in the organizational chart.

Step 7: Select the AVP or SVP unit that your department falls under

Step 8: Click your parent department within the organizational chart so that the wording for your department/area displays with green highlighting to the left (ex: Greek Life). (*Use caution not to enter information under any child departments. All outcomes should be located within the parent departments. E.g., "Club Sports under Campus Recreation should not contain any outcomes.)*

Step 9: To update information for an existing 2019-2020 Strategic Planning Department Outcome, click on the name of the outcome. Type into the fields to report on the outcome. AU Planning (formerly Compliance Assist) will auto-save as you work. (*Note that your departmental colleagues and Assessment & Strategic Planning staff members carefully reviewed wording for the 2019-2020 "Outcome Statement" section. Use caution not to change this wording, if possible.)* Make sure that the "Action Steps" section was completed, with staff members listed and timeframes assigned; expand on this section if needed.

If you had a 2019-2020 Strategic Planning Outcome that was never entered in AU Planning, while under the plans tab, with "Student Affairs Strategic Plan" selected from the drop-down menu, you will see an icon labeled "+ Plan Item" on the top right of the screen. Click this icon and select "Strategic Planning Department Outcome" from the drop-down menu. To share information about additional outcomes you measured during the year that were important to your area but that were not strategic planning department outcomes, select "Additional Department Outcome" from the same drop down menu.

Steps for Completing 2020 Effectiveness Reports (Continued)

Step 10: Enter information within each field on the form for every outcome. (*If you are using copy/paste to enter information in a field, remember to always paste in "plain text" to avoid formatting issues when your report is printed. You may right click and select the appropriate paste option or use the appropriate button on the toolbar in order to paste in plain text.*) If you are not sure what to include, see the explanations under the field titles. Continue to add information in the "Assessment Method 2 and 3" sections only if you measured your outcome in more ways than one. (See pages 2-4 for information about adding images to reports.)

Step 11: Scroll to the bottom of the screen within the fields for each outcome to locate the "Progress" indicator. Select the appropriate label for each of your department's outcomes.

Step 12: Your work will auto-save. Click the "Done" button at the bottom of the page when you are finished editing or entering your outcome. (Clicking "Done" will return to the screen containing your department's "Plan Items" (outcomes) under the Plans tab. To view a printable version of your report click the words "Read View" to the left of the "Done" button at the bottom of the screen.

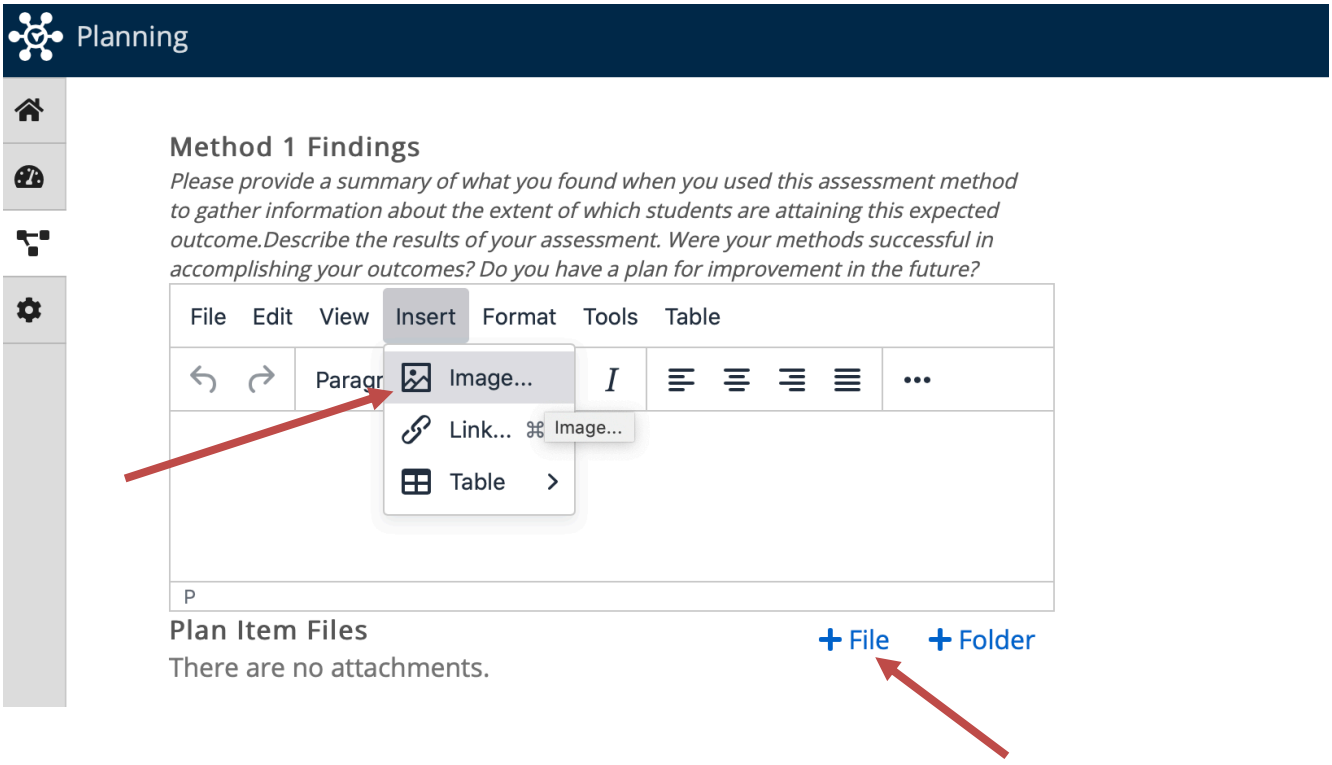
Step 13: Repeat steps 9-12 for each of your outcomes.

Steps for Completing 2020 Effectiveness Reports (Continued)

How to add an image and/or supporting documents:

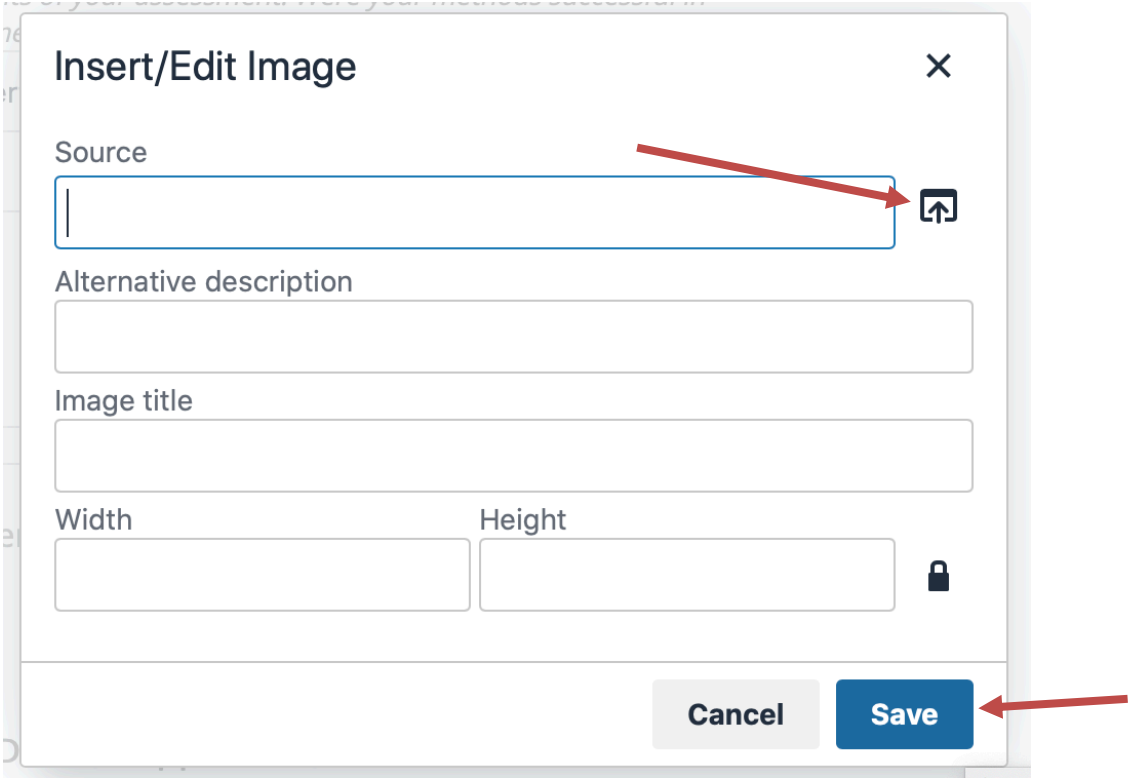
There are several options in AU Planning for adding images or supporting documents. If you click "Insert" then "Image" (see below), the image will be inserted directly into your text box. (Note: If you create a graph, table, or chart in Microsoft Excel or other software, simply copy the image and paste it in "Paint", a program located through the "Start" button on your computer within the "Accessories" folder. You will need to crop the image to a manageable size and to remove any white space that appears around the image. Save the image in "Paint" as a "jpeg". Then insert the image, generally in the Findings field, in AU Planning as instructed).

There is also an option for attaching a file (see below). This type of attachment will show up as a link below the text within the field.

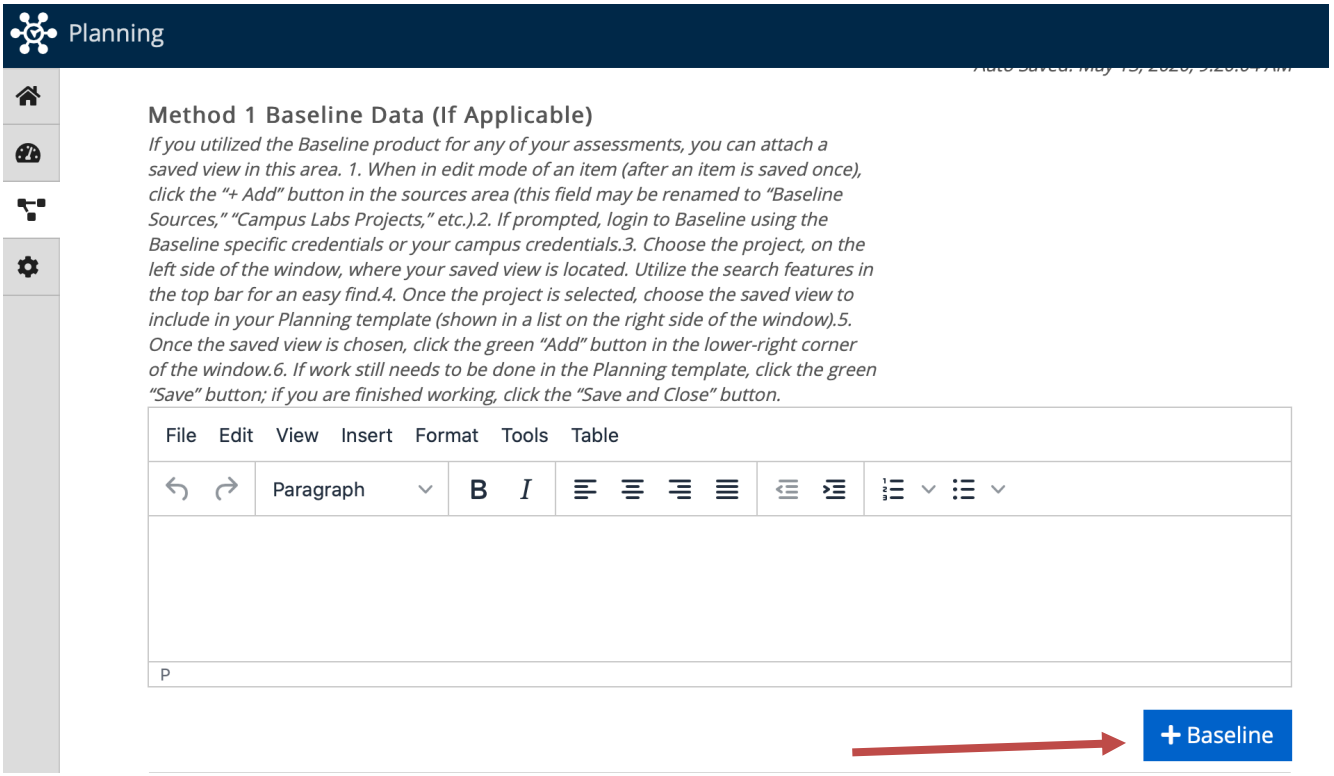


Steps for Completing 2020 Effectiveness Reports (Continued)

Once you click on "Insert" and "Image," a box will open allowing you to browse for files to attach. Browse to select the desired file and click "Save." (See below.) The image will appear within the text of the field. (Similarly, clicking the "+ File" icon (mentioned above and shown in the first image) will pull up the File Explorer on your computer, allowing you to browse, select, and attach as a link.)



Remember: You are also able to link directly to information stored in Campus Labs' Baseline using the field "Baseline Data" (see below). Note you will need to save a view within Baseline before you can link that view in AU Planning. Click here for further instructions.


Planning
Method 1 Baseline Data (If Applicable)
If you utilized the Baseline product for any of your assessments, you can attach a saved view in this area. 1. When in edit mode of an item (after an item is saved once), click the "+ Add" button in the sources area (this field may be renamed to "Baseline Sources," "Campus Labs Projects," etc.).2. If prompted, login to Baseline using the Baseline specific credentials or your campus credentials.3. Choose the project, on the left side of the window, where your saved view is located. Utilize the search features in the top bar for an easy find.4. Once the project is selected, choose the saved view to include in your Planning template (shown in a list on the right side of the window).5. Once the saved view is chosen, click the green "Add" button in the lower-right corner of the window.6. If work still needs to be done in the Planning template, click the green "Save" button; if you are finished working, click the "Save and Close" button.
File Edit View Insert Format Tools Table
Paragraph
P
+ Baseline