

## Getting Around in the Online Planning System

<https://montevallo.campuslabs.com/planning>

Google Chrome is the recommended web browser (other browsers have had minor issues).

Log In (your username & password are the same as your UM Network username & password)

In the upper left you'll see a house icon (Dashboard) and an icon that looks like an org chart (Plans). Click on the org chart icon.

Now, next to those icons you should see a drop-down box for the fiscal years (ex. FY 2022). That is where you select between the fiscal years. Currently, you want to be in FY 2022 (which is academic year 2021-2022). This is our 7<sup>th</sup> year for entering into this online system.

Below that fiscal year drop-down box, you should see another drop-down box. This is where you select between Strategic Planning, Unit Planning & Assessment, Student Learning Outcomes (for faculty), and Budget Resources. You may not see all those listed, it depends on the credentials assigned by user (who needs access to what). Currently, we are working in the Unit Planning & Assessment and Budget Resources sections.

Below the drop-down boxes is where you will select your unit/department. Depending on how many you have responsibility for, several may be visible. Some people may need to first select their Division, then their department will appear. I cannot see what you see, so if you have trouble finding your unit/department, please let me know and I'll walk you through it.

If you are in Unit Planning & Assessment (remember, check the second drop-down box), in the main portion of the screen you should see three tabs under your unit name. Plan Items, Reports, and Documents.

- The Plan Items tab is where you go to edit your Unit Mission & Description and your Goals. Once you've made changes in your goals, etc. scroll down and click the blue "Done" button at the bottom of the page. See note below on how to link a goal to a UM Strategic Plan item.
- The Reports tab is where you go to create a pdf (or Word, etc.) of your completed document, if you'd like one. Look for 2021-2022 (FY22) Unit Plan, then click on "View Report: 10/1/21 – 9/30/22," then "View Report."

When you are in Budget Resources (remember, you toggle to it from the second drop-down box in the upper left of your screen), you can see the Staffing Request and Mid-Year Funding Request items. Be sure you are in the Plan Items tab (which is displayed right under your unit name).

### How to link a goal to a UM Strategic Plan item:

Once in your goal, click the “Related” tab on the top right side. Choose “Supports (Connected Up).” Click the “+Supports.” Then, look to the left and where it shows “Unit Planning & Assessment,” change that to “Strategic Planning.” (stay in FY 2022)

For the Institution’s Strategic Plan – you’ll want to be in “Institution” (there under the search box). Find the item you want (they are displayed in the middle of the screen, you can scroll through them and hit Next at the bottom of the list, to page through them) and click the blue + sign. It will change to a green checkmark. Once you are done “attaching” any strategic plan items to the goal you are in, you’ll click “Back to Plan Item” (look to the right side of the screen). Once back in your plan item, scroll down and click the blue “done” button. You can then go into your Goal 2, etc. and do the same. Attach any strategic plan items to that goal.

Please call (665.6399) or email ([jdean5@montevallo.edu](mailto:jdean5@montevallo.edu)) Jerome Dean for help.

Version 1.3, 12-28-2021