

WILLIAM PATERSON UNIVERSITY OFFICE OF INSTITUTIONAL EFFECTIVENESS

Step-By-Step Guide for Administrative Unit Assessment in Anthology Planning

June 2021

By Dr. Patrick N. Allala

Log on to WP-Connect and do a search for "Campus Labs". Select "Campus Labs" from the pop-up.

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Or long on to WP-Connect and click on "Institutional Reports" and select "Campus Labs" as shown below.

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Information Technology	Employee Dashboard	2
Faculty & Advisors	My HR Record/Leave Balance	Θ
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Institutional Reports	Emergency Notification Setup	8
University Documents	My Training	0
	My Vision Care Reimbursements	•
	Wageverify - Income and Employment Verifications	8

Click on "Planning" as shown below



Then click on the "Plans" menu as indicated by the arrow below.

Program Assessment Cycle 2021	▼ Z Days Remaining	End 09/30/21	University Mission and Strategic Plan 7/1/12 - 6/30/22 Unit-Level Key Performance Indicators 10/1/18 - 9/30/31
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View Status Detai	ils		Administration and Finance

In the FY window select the Fiscal Year of your assessment (Eg. FY 2021 or 2022) from the drop-down arrow as shown below. Then select "Admin Unit Mission and Strategic Plan" as your template from the drop-down arrow as shown below.



Once that (Admin Unit Mission and Strategic Plan) is selected, you should see the list of all the Administrative Divisions beneath. Select your specific Administrative Division and click on your unit of assessment. The example below selected **"Division of Administration and Finance"** as the Division and select (clicked on) **"Human Resources"** as the unit, and then selected **"Development"** as its area of assessment.

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Human Resources								
Development								© 2021 Anthology In
Employee Relations								
Employee Services								
Payroll and Benefits								

Next, in the far right-hand corner of the page, click on "Plan Item". This should reveal all the Plan items you will be working with to complete your assessment. First, select "Admin Unit Mission Statement" from the list as the first template to create.

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The pop-up gives you the screen below. In the "Name" box, you may edit the name of your mission statement as "Mission Statement" or "Unit Mission Statement". The example below used "Mission Statement". Then in the "Progress" box, from the drop-down arrow, select the stage at which you are in the assessment process. If it is ongoing, select "Ongoing"; if it is completed, select "Complete", etc. Next, type in or copy and paste your mission statement in the "Mission Statement" box as shown below.

NB: Do not change the <u>"start</u>" and "<u>end"</u> dates. Leave as is. They are pre-set in the system.

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	Barreau Myranda Administrator

Then click "Done" (as shown below) to save your entries.

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Next, go back "Plan Item", as before, and select "Admin Unit Strategic Plan Goal" (See screen below)

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Human Resources Development	Show 10 • Viewing 1-1 of 1	Admin Unit Strategic Planning - Measures, Targets, Results Admin Unit Strategic Plans - Action Plans and Updates
		© 2021 Anthology Inc.

In the pop-up page, you may edit the name of your goal as "Goal 1", "Goal 2", "Goal 3"... (Up to the number of goals you may have as you repeat the process). Then in the "**Progress**" box select the stage at which you are in the assessment process (Eg. "**Ongoing**") as seen below. Next, type in or copy and paste your unit goal for "Goal 1" into the "**Strategic Plan Goal**" box as shown below. Then click on "**Done**" below the Strategic "**Plan Goal**" box to save your entries.

NB. You will repeat this process for as many goals as you have for your assessment cycle. Each goal having its own page. If, for example, you have five (5) goals, you will repeat the process five times.

Again, do not change the <u>"start</u>" and "<u>end"</u> dates. Leave as is. They are pre-set in the system.

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Then click on **"Done"** to save your entries as shown below.

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[OPTIONAL- FOR UNITS THAT HAVE OBJECTIVES]

Next, go back to "Plan Item" and select "Admin Unit Strategic Plan Objective (optional)". In the "Name" box edit the name to read "Objective 1".

Leave the Start and End dates as is. Next, indicate your progress in the **"Progress"** box (ongoing, completed, On schedule, etc.).

Next, type in or copy and paste your objective into the "**Strategic Plan Objective**" box as seen below and click "**Done**" to save your entry.

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NB: You will repeat this process for as many Objectives as you have (Objective 2, Obj..3, Obj...4, etc. depending on how many you have).

Next, you will go back to "Plan Item" and select "Admin Unit Strategic Planning – Measures, Targets, Results".

In the pop-up page, change the name in the "Name" box to "Measure 1". Select your current stage in the "Progress" box (Eg. "Ongoing", "Completed", " On schedule", etc.).

In the "Measures/Metrics" box, type in or copy and paste your measure/metric used to assessed/evaluate your goals. **Do not change the** "<u>start</u>" and "<u>end</u>" dates.

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Next, upload into the **"Plan Item Files"** any document relevant to the assessment process that indicate evidence of actions taken to evaluate your stated goals. Do so by clicking on **"Folder"** to give a name to the folder directory into which you will upload your document. Then click on the **"File"** menu to locate your saved document(s) for upload. **Please see screenshot below**. **This is not mandatory. You can instead upload all supporting documents into the "Documents" folder**.

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Auto Saved: Jun 30, 2021, 1:33:58 PM Target Quantify the goal that you would like this measure to attain.	 Barrera, Silvia Bivaletz, Theresa 	Administrator

Next, state in the **"Target"** box, your target or benchmark set as the indicator of achievement/accomplishment/success. **Please see screenshot below.**

Then in the "Results" box, describe the resultant data produced by your measure/matric, which was stated earlier above. This would be completed when assessment is done and results are entered.

Next, in the Target Attainment" box, select the indicator of the achievement status described above from the drop-down arrow. (Eg. "Met", "Partially Met", "Not Met" or "No Evidence Collected").



NB. Below the "Result" box is the provision to load up any supporting document of your result attainment.

Describe the resultant data produced by the measure/metric.		Item Visibility
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Then click "Done" to save your entries.

Action Plan Template

You will use this template only if your assessment findings (results) reveal shortfalls or gaps that need to be addressed in the next academic year. (Example, not meeting established target(s), encountering issues that prevented you from meeting your target). You do not need to use this template if all benchmarks are met.

To use this template, go back to "Plan Item" and click on "Admin Unit Strategic Plans – Action Plans and Updates".

In the pop-up page, edit the "Name" to read "Action Plans and Updates" (as seen in the screenshot below).



Then in the "Action Plans and Update" box, state your action plans based on the results of the achievement reported; outcomes not met or no evidence collected; and what the plan is going forward – aiming at the improvement of what has been achieved. State the Outcome number to which the Action Plan is being associated with.



NB: Please, be sure you date each entry and describe what actions will be undertaken based on the results of this assessment. You may come back to add updates or delete wrong entries (if in error).

You may also upload additional documents about future action plans based on the results of the assessment

AGAIN, PLEASE ADD DATES TO ALL ENTRIES.

Then click on "Done" to save all entries.

[Relating or Connecting of Plan Items]

You would need to relate (connect) your Planning items for your assessment to generate the relevant results in your Report Template.

First, click on your **"Unit Goal 1"** and to the top right corner, select **"Related"** and then click on **"Support (connected UP)"** plus sign by it **[+ Supports**] as shown below.

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Next, click on the Mission Statement plus sign [+] by it to connect your mission statement to your Goal(s). Next, click on "**Back to Plan Item**" to return to your Goal template as shown below.



You should see a black "x" [x] by the connected Mission Statement to your far right indicating a connection. Next, click "Done" to save your entry.

Template: Admin Unit Strategic Plan Goa	I	20	Permissions 🗍 Related (1)	() History	
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Next, click on **"Objective"** to connect your Goal 1 (or corresponding goal) to your **"Objective"** by clicking on the plus sign to your right of **"Goal 1"**. Once the plus sign is clicked, you should see a green check mark indicating a connection between your **"Goal"** and **"Objective"**.

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The green check sign indicating connection between "Objective" and "Unit Goal" below.

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Next, click on **"Back to Plan Items"** to return to the **"Objective"** template and click "Done to save your entry.

[CONNECTING YOUR MEASURE TO YOUR ACTION PLAN & UPDATES]

Click on your "Measure 1", then (using the "Supported By [Connected Down]"), click on + Supported By plus sign as shown below.

Next, on the popped up page, click on the blue [+] (plus) sign to the right of "Action Plans and Updates". You should see a green check mark indicating that a connection is being made between "Measure 1" and "Action Plans and Updates" as shown below.

Next, click on the **"Back to Plan Item"** to return to the **"Measure 1"** template and click **"Done"** to save your entry.



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NB: The process above to relate (connect) items should be repeated for as many <u>Goals</u> <u>Objectives</u>, <u>Measures</u>, and <u>Action Plans and Updates</u> as you have entered for the assessment cycle.

THE GENERATION, PRINTING & SAVING OF RESULT/REPORT



After all items have been connected, now is the time to generate your report from the assessment just completed.

To do this, click on "Report" at the very top of the page to open the "Report" template as shown below.

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	Action Plans and Updates	
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Next, click on the "View Report: 10/1/21-9/30/22" to load up your assessment report as shown below.

ology Planning		R (B)
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Q search	Sort Default	
William Paterson University Division of Administration and Finance	Admin Unit Report This report has been shared from William Paterson University and can only be modified there. Created by Bartick 7/8/2021 Wew Report: 10/1/21 - 9/30/22 ~	
Human Resources	Sample Report Academic Program Assessment	
Development	This report has been shared from William Paterson University and can only be modified there. Report reated by Campus Labs consultant to demonstrate reporting functionality. View Report: 10/1/20 - 9/30/21	
	Show 10 • Viewing 1-2 of 2	

You may decide to load up your report in either <u>Word Document</u> (most preferred), <u>CSV</u>, or <u>PDF</u> format.

In Word Document

Under "Admin Unit Report", click on "View Report: 10/1/21 – 9/30/22" and select "Word Export", as shown below, and click on it.

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filliam Paterson University	Admin Unit Report This report has been shared from William Paterson University and can only be modified there. Created by Patrick 7/8/2021	
evelopment	View Report View Report Customize Dates Imic Program Assessment	
	CSV Report ared from William Paterson University and can only be modified there. Word Export Labs consultant to demonstrate reporting functionality. Print V30/21 *	
	Show 10 • Viewing 1-2 of 2	

[NB: The loading-up takes between a few seconds to 3 minutes to finally load up]

Save a copy of the generated report in a *temporary folder* on your computer (*Document folder*, *Desktop*, *etc*.) to be transferred into the **"Documents"** folder in Planning.

Documents Folder

To save a copy of the generated report in the appropriate folder in **Planning** associated with each academic year, follow the steps below to create the folders for respective academic years if they are not already created.

Creating Folders for Reports and Documents in "Documents" in Planning

While logged into Planning and under your program portal, click on the "Documents" tab at the top as shown below.

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* @ ∵	🗎 FY 2021 🔹	FY 2021 / ADMIN UNIT MISSION AND STRATEGIC PLAN Development Plan Items Reports Documents		
	My Units Institution Q search	Documents	+ File	+ Folder
	William Paterson University Division of Human Resources Development	Note: To relate a single document to multiple organizational units the document must be added to each organizational unit separately.		

Next, click on "+Folder" [1] (to your far right) and type in your folder name (e.g. AY 2021-2022) [2]. Click "save" [3] to save your new folder. See screenshot below.

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	Development	Directory Name AY 2021 - 2022	Cancel	Save

Upload the report and other documents into the folder by clicking on "+File" as shown below.

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	Development	AY 2021 - 2022 + File + Folder	<table-cell> Renar</table-cell>	ne 面

Next, locate (search for) the document file from the temporary folder (Desktop, Document, etc.) in which report was temporarily saved. Open the file and save the **report** now into the new folder created under "**Document**" in Planning (AY 2021 -2022).

PRINTING OF REPORT

To print your report, click the "Print" button to your far-right-top-corner of the page.

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Objective (optional) 1XX					
Strategic Plan Objective:					
Our objective XXXXXXXXXXXXXXXXXXXXXX	XXXX				
RELATED ITEM LEVEL 1					
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REPORT IN PDF

Create a folder on the desktop or your personal drive for temporary housing of the generated report. Right-click on the generated report and select "Save As". In the "Save as type" window, select "Webpage, Single File" from the drop-down arrow.

Next, click "Save" to save the generated report to your temporary folder (to be deleted later).

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Next, go back to the "**Report**" template and click on "**Documents**", then on "**Folder**" to create and name the folder **AY 2021-2022** as shown below.

Admin Unit Mission and Stra 🔻	fy 2021 / Admin Unit mission and strategic plan Development		
My Units Institution	🐨 Plan Items 📑 Reports 🖿 Documents		
search	Documents	+ File + Folder	
iam Paterson University	Note: To relate a single document to multiple organizational units the document must be added to each organizational unit separately.	_	
ision of Administration and ance	There are no attachments.		
man Resources	Directory Name	_	
velopment	AY 2021-2022	Cancel Save	

Next, click on "File" and search for your saved "Development Report" from your desktop and select it.

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 FY 2021 FY 4dmin Unit Mission and Stra * 	FY 2021 / ADMIN UNIT MISSION AND STRATEGIC PLAN			
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Development	· · · · · · · · · · · · · · · · · · ·			

Next, click on **"Open"** to load up the **"Development Report"** into your newly created **Folder: AY 2021-2022** as shown below.

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	Division of Administration and Finance	► AY 2021-2022 + File + Folder 🕼 Rename 💼		
	Human Resources Development	D Development Report,mhtml		

Below is a sample of the pdf report profile (In our case, the report of the Development Unit under HR as generated by this demo).

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Filter Report	Clear Filters Apply F
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Development	
Mission Statement	
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Goal 1 XX	
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Strategic Outcome XXXX	
Outcome:	
OutcomeXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX	
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[End of Assessment and THANK YOU FOR THE GOOD JOB DONE!!!]