

Louisiana State University at Eunice



**Compliance Assist Training
Running Reports**

Paul Fowler

Director of Institutional Effectiveness

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Compliance Assist (CA) Training – Running Reports July 10, 2020

Section I: Purpose

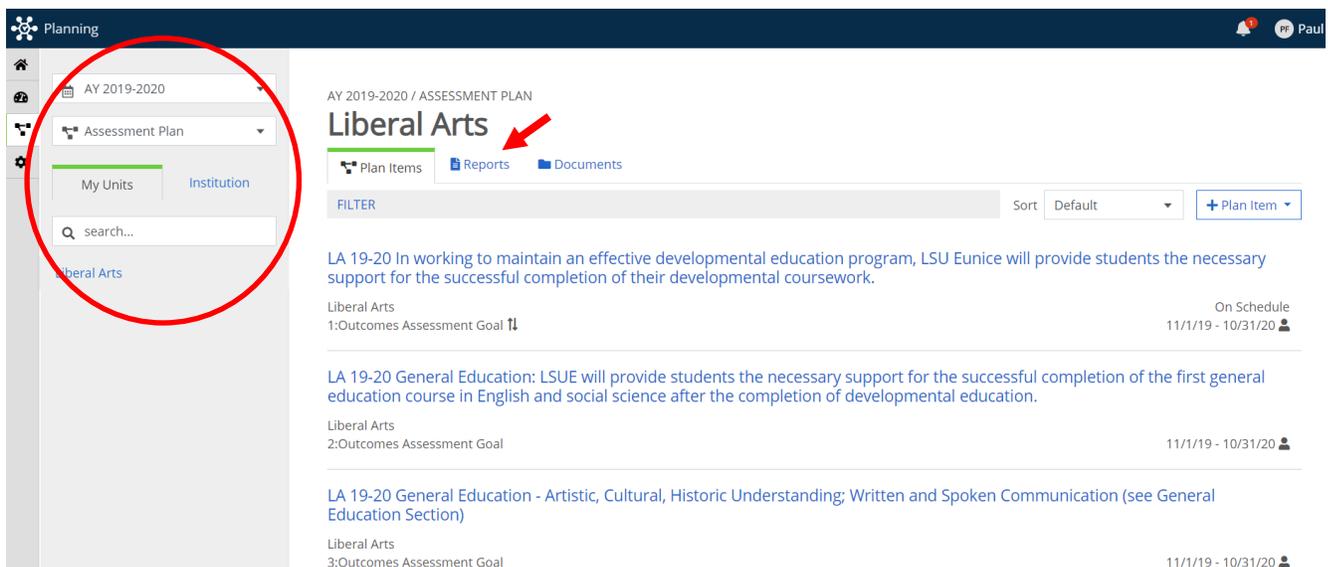
The purpose of this module is to give users an understanding of how to print reports in their individual departments. Reports may be displayed for an entire division (section II), a department within a division (section III), or for each vision, mission, goal, and objective (section IV).

This document does not repeat the login, dashboard, or the plans tab information from the Campus Labs Planning Module training. Instead, links are provided below for the reader's convenience.

- For log in procedures, see Section IV: [Login Information](#)
- For entering the planning system and the dashboard page, see Section V: [The Dashboard](#)
- For additional information on the Plans Tab, see Section VII: [The Plans Tab](#)

Section II: Printing all Assessment Plans within a Division

Either use the “My Units” or “Institution” tab and the organizational tree to navigate to the unit that is to be printed. Liberal Arts has been selected below in the Plans Tab. The user may leave the academic year (AY) and the choice of plans in the red circle to default because the report parameters are set when choosing the report. To view the various reports, click the  Reports Tab shown by the arrow after the planning system has landed on the proper department.



The screenshot displays the Planning system interface for the Liberal Arts department. The left sidebar shows the navigation menu with 'My Units' and 'Institution' tabs, and a search bar. The main content area shows the 'AY 2019-2020 / ASSESSMENT PLAN' for 'Liberal Arts'. The 'Reports' tab is highlighted in the navigation bar, indicated by a red arrow. Below the navigation bar, there is a 'FILTER' section and a 'Sort' dropdown menu set to 'Default'. The main content area lists several assessment goals for Liberal Arts, including '1:Outcomes Assessment Goal' and '2:Outcomes Assessment Goal', with their respective dates and status (On Schedule).

Clicking on the [Reports](#) Tab will open the window below. Each of the reports on this page are set to run reports on the different sections of the planning system.

1. **The Departmental Assessment Goals and Objectives Report** displays all assessment plan objectives and goals in the selected department and all departments that report to it for the year selected. All relationships from the departmental objectives to the departmental goals and to LSU Eunice's Strategic Goals are also displayed. Results are sorted by department and by objective number.
2. **The Departmental General Education Report** displays all general education outcomes for the department and the year selected with their relationships to the general education outcomes at the Academic Affairs Level and their relationship to LSU Eunice's Strategic Goals. Results are sorted by department and by objective number.
3. **The Departmental Vision and Mission Report** displays the vision and mission statement for the department and all departments that report to it for the year selected. No relationships exist for vision and mission. Results are sorted by department.

NOTE: The dates shown by the number 4 represent the dates that the reports were created and may be changed. The process is described below.

Planning

AY 2019-2020 / STRATEGIC PLAN

Liberal Arts

Plan Items **Reports** Documents

Sort Defa

- 1 **Departmental Assessment Goals and Objectives Report**
This report will run Assessment Plan Objectives and Goals along with their relationships to Strategic Goals. The objectives appear first.
[View Report: 11/1/18 - 10/31/19](#) 4
- 2 **Departmental General Education Report**
This report will run the General Education Outcomes only.
[View Report: 11/1/18 - 10/31/19](#) 4
- 3 **Departmental Vision and Mission Report**
This report runs the Departmental Vision and Mission only.
[View Report: 11/1/18 - 10/30/19](#) 4

Clicking [View Report](#): on any of the reports will enable the drop down for that report as shown in the screenshot below. In the drop down menu, clicking

- [View Report](#): will display the report as a webpage. The report may be downloaded to a pdf, if needed.
- [Customize Dates](#) will allow the user to display the report for a different academic year.

NOTE: The planning system is set up so that AY 2018-2019 runs from November 1, 2018 through October 31, 2019. The lag time allows planning heads time to enter their data prior to the academic year switching in the system. This is typical for all academic years. Further information on changing the date range follows.

- [CSV Report](#) will display the data in Microsoft Excel.
- [Word Export](#) will download the report to Microsoft Word so that it may be edited.
- [Print](#) will download the report as a webpage so that it may be printed or changed to a pdf file.

Each report's drop down menu has the same functionality.

The screenshot shows the Planning system interface. On the left is a navigation sidebar with a search bar and a list of units including 'Liberal Arts'. The main content area is titled 'AY 2019-2020 / STRATEGIC PLAN' and 'Liberal Arts'. It features tabs for 'Plan Items', 'Reports', and 'Documents'. A dropdown menu is open over the 'View Report: 11/1/18 - 10/31/19' link, showing options: 'a View Report', 'b Customize Dates', 'c CSV Report', 'd Word Export', and 'e Print'. The page lists two reports: 'Departmental Assessment Goals and Objectives Report' and 'Departmental Vision and Mission Report'.

To change the dates for the report, click **b.** [Customize Dates](#). The window below will open allowing the user to choose the dates.

NOTE: All academic years in the planning system at LSU Eunice begin on November 1, xxxx and end on October 31, xxxx (the next year). For example, if the user wanted to run the report for AY 2014-2015, then the user would enter the following dates: Start Date: November 1, 2014 with an End Date of October 31, 2015.

NOTE: It is recommended that users simply change the year only and not the other parts of the date range. For example, open the page and click on the “Start Date” year of 2018 and change it to the year desired, then do the same for the “End Date” leaving the month and day intact. This will direct the planning system to print one academic year at a time. Displaying reports over multiple years will combine data and may be a bit confusing.

Planning

UNIT REPORT

Custom Report Date Range

Departmental Assessment Goals and Objectives Report

This report will run Assessment Plan Objectives and Goals along with their relationships to Strategic Goals. The objectives appear first.

Date Range
Adjust the start and end dates and click, View Report

Start Date: 11/01/2018

End Date: 10/31/2019

Cancel Word Export CSV Report View Report

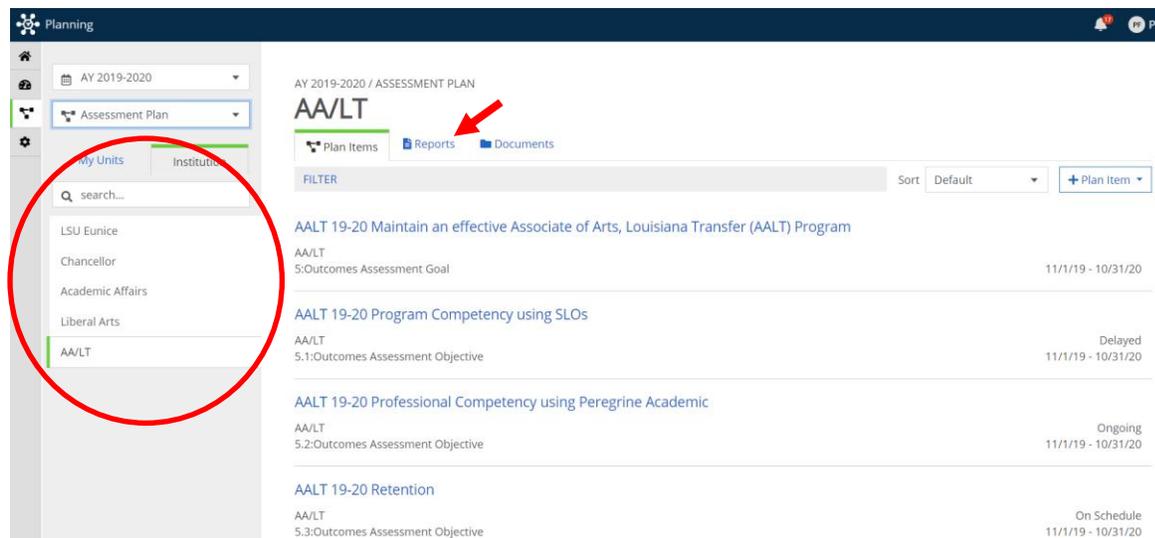
After changing the years, the user can then click [Cancel](#) to cancel the report and return to the previous page, [Word Export](#) to download the report to Microsoft Word, [CSV Report](#) to download the report to Microsoft Excel, or [View Report](#) to open a new webpage and display it as an html document that can be printed or saved as a pdf.

Section III: Printing Planning Items for Individual Units

Thus far, this training aid has focused on running reports for the entire division such as Liberal Arts. Reports that need to be displayed for individual departments are treated in the same way except that the user must select the department desired in the organizational tree in the “Plans Tab” at the left of the screen shot below shown in the red circle.

Here, the user is interested in the AA/LT outcomes only. Clicking on the [Reports](#) tab as shown by the red arrow allows the user to display the three reports for the AA/LT degree only. The results will be displayed by objective number with relationships to the departmental goal and to LSU Eunice’s Strategic Goals.

NOTE: General Education Objectives are at the Division Level except for Economics. Economics is held in the Management Program because it is the only General Education Course in the Division. As a result, running the General Education report for AA/LT will result in no output.



The screenshot shows the Planning system interface for the AA/LT Assessment Plan. The left sidebar contains a navigation tree with the following items: LSU Eunice, Chancellor, Academic Affairs, Liberal Arts, and AA/LT. The AA/LT item is circled in red. The main content area shows the 'Reports' tab selected, with a red arrow pointing to it. The main content displays a list of assessment objectives for the AA/LT program.

Assessment Objective	Status	Period
AA/LT 5:Outcomes Assessment Goal		11/1/19 - 10/31/20
AA/LT 5.1:Outcomes Assessment Objective	Delayed	11/1/19 - 10/31/20
AA/LT 5.2:Outcomes Assessment Objective	Ongoing	11/1/19 - 10/31/20
AA/LT 5.3:Outcomes Assessment Objective	On Schedule	11/1/19 - 10/31/20

After the [Reports](#) webpage opens, click the desired report and proceed as indicated above.

Section IV: Printing Individual Vision, Mission, Goals, and Objectives

The last section in this aid is displaying and printing a single vision, mission, goal, or objective for an individual department. Note that this process is different from the sections above and requires the user to not only select the specific department in the Plans Tab, but the year and type of plan as well (see red circle).

For this example, the user clicked on the hyperlinked text for goal 1 as shown by the red arrow.

The screenshot displays the Planning system interface for the Science & Mathematics department. The left sidebar navigation menu is circled in red, showing options for 'My Units' and 'Institution'. The main content area shows the 'Science & Mathematics' assessment plan for 'AY 2019-2020 / ASSESSMENT PLAN'. A red arrow points to the 'FILTER' button above the list of goals.

Plan Item	Reports	Documents
SCI 19-20 In working to maintain an effective developmental education program, students will be provided the necessary support for the successful completion of their developmental coursework.		
Science & Mathematics 1:Outcomes Assessment Goal		11/1/19 - 10/31/20
SCI 19-20 General Education: Competency in sciences and mathematics		
Science & Mathematics 2:Outcomes Assessment Goal		11/1/19 - 10/31/20
SCI 19-20 Sequential Courses		
Science & Mathematics 4:Outcomes Assessment Goal		11/1/19 - 10/31/20
SCI 19-20 Developmental Math (MATH 0001)		
Science & Mathematics 1.1:Outcomes Assessment Objective		On Schedule 11/1/19 - 10/31/20

Clicking the hyperlinked text will open the goal in edit mode as shown in the screenshot below. This partial view shows the [Read View](#) button at the bottom of the edit window shown in the red circle. Clicking the [Read View](#) button will open the goal in a separate window in a printable format.

Note: The [Read View](#) button appears at the bottom of each vision, mission, goal and objective next to the [Done](#) button.

The screenshot displays the 'Edit Plan Item' interface. The top navigation bar is dark blue with a 'Planning' label. The left sidebar contains navigation icons. The main content area is titled 'AY 2019-2020 / ASSESSMENT PLAN' and 'Edit Plan Item'. The form includes the following fields:

- Template:** Outcomes Assessment Goal
- Goal Number ***: Input field containing '1'
- Goal ***: Text area containing 'SCI 19-20 In working to maintain an effective developmental education program, students will be provided the necessary support fr'
- Start ***: Date picker showing '11/01/2019'
- End ***: Date picker showing '10/31/2020'
- Progress**: Dropdown menu
- Provided By ***: Selection showing 'Science & Mathematics'
- Budget Information**: Empty text area

At the bottom of the form, there are two buttons: 'Delete' and 'Read View'. The 'Read View' button is circled in red. To the right of the form, there are tabs for 'Permissions', 'Related', and 'History'. Below these tabs, there is a section for 'Assign Responsible Users' with a 'Responsible Users' list (currently empty) and an 'Available Users' list. The 'Available Users' list includes:

+	Name	Role
+	Ardoin, Brian	Administrator
+	Batiste, Barbara	Administrator
+	Borill, Brandon	Administrator
+	Broussard, Michael	Administrator
+	Ceaser, Melonie	Contributor
+	Cilano, Joe	Administrator

Questions on any of the material in this document may be addressed to Paul Fowler at pfowler@lsue.edu.