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# Step-by-Step Instructions for Using the Online Planning Software

ECC Plan Builder v1.2



Staff Development Office  
November 2007

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## Introduction

The purpose of this guide is to provide sequential step-by-step instructions (Sections I through Section VI) on how to use the online planning software. The guide is divided into the following sections:

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## SECTION I: ACCESS THE ONLINE PLANNING SYSTEM

### Step 1: To log into the online system.

You can access the online system from any internet enabled computer, even off-campus.

- Open your **Internet Explorer**.
- Type in URL: **http://eccplan/pb**



Double click on your Internet Explorer icon located on your computer desktop.

Log into Plan Builder using your ECC Logon and password.

Your login prompt will look like this.

If you would like to create a desktop shortcut to Plan Builder for future use, after logging on click File > Send > Shortcut to Desktop.



**TIP!**

A screenshot of a web browser window titled 'Connect to eccplan'. The window has a blue header with a key icon. Below the header, the domain 'elcamino.edu' is displayed. There are two input fields: 'User name:' with a dropdown menu showing 'dmano' and 'Password:' with a masked field of six dots. Below the password field is a checkbox labeled 'Remember my password'. At the bottom right, there are 'OK' and 'Cancel' buttons.

### Step 2: Once you see the screen to the right, you have successfully logged into the online planning system.

A screenshot of the 'Welcome to Online Planning' screen. The title is 'Welcome to Online Planning'. Below the title, it asks 'What would you like to do?'. There are four buttons: 'Start a New Plan', 'Open an Existing Plan', 'Create Reports', and 'Sign-Off on a Plan'.

### Step 3a: To start a plan when No Previous Online Plan exists.

## ATTENTION—PLEASE READ BEFORE YOU PROCEED

For Steps 3a and 3b, there are two sets of instructions depending upon whether no previous online plan exists or an online plan does exist. **Step 3a** is to be followed when **No Previous Online Plan** exists. Instructions under **Step 3b** are to be followed when a **Previous Online Plan** exists. Before you proceed, decide which set of instructions you will follow. If you are unsure, please call the Staff Development Office at extension 3871.

### No Previous Online Plan

- Click the “**Start a New Plan**” box.

If you do not complete the entire plan during this session, you will click the “**Open an Existing Plan**” box when you later return to work on your plan.

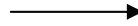


**TIP!** Step 3a: To start a plan when No Previous Online Plan exists (con't).

A screenshot of the 'Welcome to Online Planning' screen, identical to the one in Step 2. A callout box with a speech bubble points to the 'Start a New Plan' button, containing the text 'Click here'.

## SECTION II: START A PLAN

- The “**Start a Plan**” screen will appear
- Click the “**New empty plan**” box.



Since this is your first online plan, you will need to create your first online plan in the system. Next year, you will create your online plan by clicking the “**Rollover a previous plan**” box.



### TIP!

#### No Previous Online Plan

- Under the “**Year**” field, click the downward arrow.
- Select the year for which you are creating a plan. For example, select “**2008-09.**”
- Under the “**Type**” field, click the downward arrow next to “**Select a plan type from this list.**”
- Select “**Program,**” “**Unit,**” or “**Area**” for an annual plan **OR** “**Review**” to create a Program Review plan.
- Under the “**Area**” field, click the downward arrow next to “**Select an Area from this list.**”
- Select your area: President, Academic Affairs, Administrative Services, or Student Services & Community Advancement.
- Select your unit and program.
- Make sure the year, type of plan, area, unit, and program fields are correct.
- Click the “**Continue**” box.
- A “**Microsoft Internet Explorer**” message will appear on the screen asking if you would like to create the plan.
- Review the information. Make sure the year, area, unit (if applicable), and program (if applicable) are correct.
- Click “**OK**” if you want to create the plan.
- Click “**Cancel**” if you do not want to create the plan.
- Click “**OK.**”

### Step 3b: To start a plan when a “Previous Online Plan” exists.

The big advantage of starting a new plan from a previous online plan is that all of the information in your previous online plan will automatically rollover into your new plan. You then need only to edit and update the

## SECTION II: START A PLAN

information.

### Previous Online Plan

- Click the “Start a New Plan” box.

If you do not complete the entire plan during this session, you will click the “Open an Existing Plan” box when you later return to work on your plan.

- The “Start a Plan” screen will appear. →
- Click the “Rollover a previous plan” box. The rollover feature enables rollover sections of your previous online plan into your new plan.

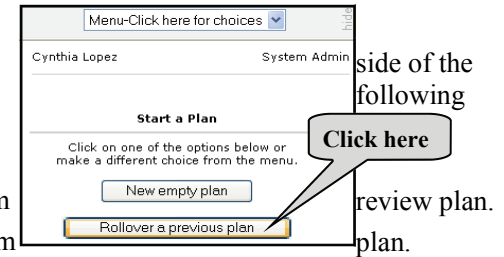
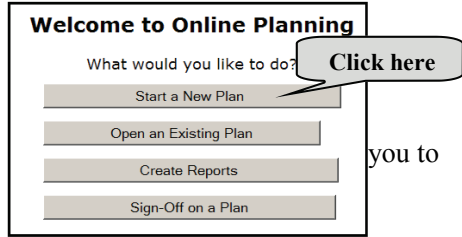


#### TIP!

#### First, locate your previous online plan

You need to find your previous online plan in the system. The right hand screen lists all the existing online plans in the system. Keep in mind the parameters when choosing the previous online plan you would like to rollover to your new plan:

- ◆ You can rollover a previous online program plan into a new program
- ◆ You can rollover a previous program review plan into a new program
- ◆ You can rollover a previous unit plan into a new unit plan.
- ◆ You can rollover a previous area plan into a new area plan

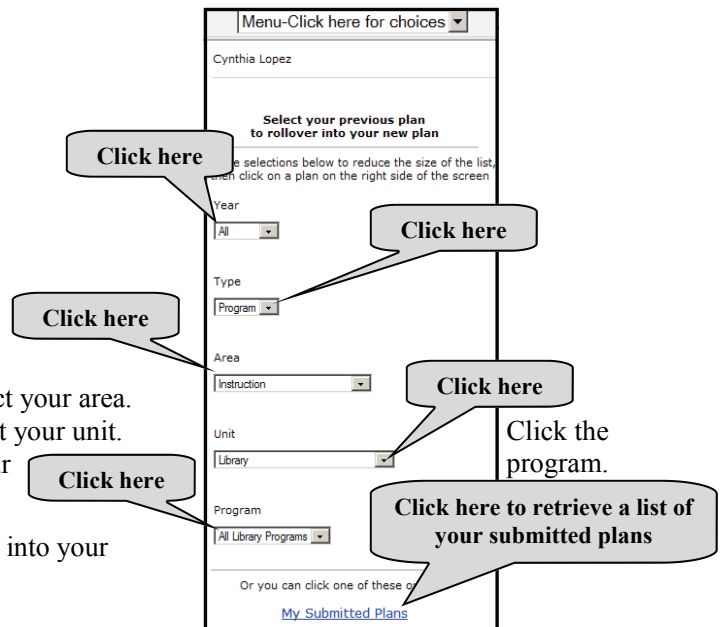


The list of existing online plans is long. Thus, locate your plan by doing **one** of the following:

**Option 1:** You can sort the list by plan id, date submitted, program, unit, or area. Click on the header of the column you wish to sort the list by. Scroll down to find your plan, and then click on your plan.

**Option 2:** Reduce the size of the list by doing the following:

- Click the downward arrow under the “Year” field.
  - Select the year of your last year’s plan.
- Click the downward arrow under the “Type” field.
  - Select the type (program, review, unit, or area) of the previous online plan you would like to use as the base of your plan.
- Click the downward arrow under the “Area” field. Select your area. Click the downward arrow under the “Unit” field. Select your unit. Click the downward arrow under the “Program” field. Select your
- After you make your selections, click on the previous online plan (right side of the screen) you wish to rollover into your new online plan.



## SECTION II: START A PLAN

**Option 3:** You can retrieve a list of your previously submitted online plans.

- Click the “**My Submitted Plans**” field in blue text (located at the bottom of left side of the screen).
- Click on the previous online plan (right side of the screen) you wish to rollover into your **new** online plan.

### Second, Start Your New Online Plan

- Select the type of plan under the “**Select the Type of Plan to Create:**” sentence.
- Click the “**OK**” box.

Review the information under your “**Previous Plan**” section. Make sure the year, type, name of program (if applicable), unit, and area of the existing plan you wish to rollover to your new plan are correct.

Menu-Click here for choices ▾

Cynthia Lopez

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**Previous Plan**

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Plan: 117 9/8/2005  
2006-07 Program Plan  
Program: Library Technology  
Unit: Library  
Area: Instruction

**Year for New Plan:**

2007-08

**Select the Type of Plan to Create** Click here

Program ▾

OK Cancel



**TIP!**

### **Step 4: To create your Planning Team in the online system.**

You need to create your planning team before anyone can work on or sign-off on your online plan. These are the individuals who collectively developed the plan. This step is very important and should not be overlooked.

- Click the “**Administration**” field located on the left side of the screen.
- Click the “**Plan Team**” field.
- Decide who are the participants in your Planning Team. The three types of participants are individuals:
  1. Who can only write to the plan (e.g., individuals you have assigned to work on (edit) the plan or

## SECTION III: CREATE A PLANNING TEAM

secretaries who type the plan).

2. Who can acknowledge participation in the development of the plan, but cannot write to the plan.
  3. Who can both write to (edit) and acknowledge participation in the development of your plan.
- Go to the “**Employee List**” (located on the right side of the screen) and scroll down to find the employee’s name (listed in alphabetical order). An employee must have a ECC login name and password to be listed in the “**Employee List**.” If you have an employee that is part of your Planning Team and who does not have a login name and password, you need to contact Donna Manno in Staff Development (ext. 3871).
  - Click on the name of the employee.
  - Click on an arrow box to add or remove names from the list.
  - Once you have inserted all the names of the individuals of your Planning Team, the system will automatically save the employees’ names.

**NOTE:** The names of the individuals who can edit and acknowledge participation in the development of the plan must be inserted in both the “**People who can edit this plan**” section and the “**People who can acknowledge participation in this plan**” section.

**Support Service**  
Support Service statements that program intends employees, etc., who receive services; **OR** 2. efficiency the accomplish in its or processes el., 2005<sup>1</sup> and

Plan Team

Plan Leader: Lopez, Cynthia

Click on a name then an arrow button to add or remove people from the plan team lists.

People who can edit this plan

Employee List

People who can acknowledge participation in this plan

Wilcox, Stuart - SAWILCOX  
Tillman, Beverly - BWTILLMAN  
No entries found

Telle, Beverly - BATATE  
Tatsugawa, Shihoko - SSTATSUGAWA  
Taylor, Daryl - DJTAYLOR  
Teng, Maria - MNTENG  
Thibodeaux, Lisa - LGWHITING  
Thomas, Charlotte - CSTHOMAS  
Thomas, Deryll - DETHOMAS  
Thompson, Leslie - LATHOMPSON  
Thompson, Brent - BTHOMPSON  
Thrasher, Mike - MXTHRASHER  
Triguer, Flora - FXTIGNER  
Tillman, Beverly - BWTILLMAN  
Timmer, Mary - MCTIMMER  
Tirapelle, Robert - GRTIRAPELLE  
Tirapelle, Leslie - LATIRAPELLE  
Tomlinson, John - JRTOMLINSON  
Torres, Robert - RATORRES  
Torres, Richard - RRTORRES  
Torres, Hermila - HETORRES  
Tran, Lan - LNTRAN  
Trendler, Teresa - TATRENDLER  
Trinh, Ken - KXTRINH  
Truong Counseling Intern, Len - LXTRUONG

**Outcomes (SSOs)**  
Outcomes are describe: 1. what the to produce in students, community members, the program’s key what level of quality or program desires to key services, activities, (adapted from Smelin at WEAVE: A Quality

Enhancement Guide, 2000<sup>2</sup>). SSOs are **not** outcomes that result from every single process, service, or activity. Rather, SSOs are the overarching or broadest outcomes that contribute to the accomplishment of the program’s mission. In developing SSOs, it may help to decide if your outcome will describe what your services will produce in someone (impact) **OR** what is the desired level of quality or efficiency of your key services, activities, or processes (quality). See below for an explanation of each type (adapted from WEAVE: A Quality Enhancement



## SECTION IV: CREATE A PLAN

### ATTENTION—PLEASE READ BEFORE YOU PROCEED

For Steps 5 through 21, two sets of instructions are presented. Under each step, instructions on the left side of the picture are to be followed when **No Previous Online Plan** exists. Instructions on the right side of the picture are to be followed when a **Previous Online Plan** exists. Before you proceed, decide which set of instructions you will follow. If you are unsure, please call the Staff Development Office at extension 3871.

#### Step 5: To enter or update your mission statement.

- Click the “Sections from previous plan” field (located on the left side of the screen).
- Click the “Mission Statement” field.

#### No Previous Online Plan

- Go to your existing plan (probably a Word document), highlight and copy the mission statement.
- Paste the mission statement in this section.
- Review this section, and make any necessary changes or updates.

Menu-Click here for choices

Indicate the program's mission. What is the program's purpose? What does the program intend to accomplish?

Cynthia Lopez System Admin

Mission Statement

The mission of the accreditation program is to serve the entire college community by coordinating and facilitating the college's accreditation process. Therefore, this program's mission supports the college's mission of academic excellence.

Type here

Click here

The Plan

- Administration
- Sections from Previous Plan
  - Mission Statement
  - Overarching Outcomes
  - Characteristics, Performance, and Trends
  - Strengths and Weaknesses
  - Opportunities and Challenges
  - Evaluation of Performance
  - 3-5 Year Strategic Directions
- Goal 1

#### Previous Online Plan

- This is the mission statement that rolled over from your previous online plan.
- Review this section, and make any necessary changes or updates.

#### Step 6: To enter your overarching outcomes.

##### **Overarching Outcomes**

ECC is accredited by the Accrediting Commission for Community and Junior Colleges, Western Association of Schools and Colleges (WASC). WASC requires that all accredited institutions develop Student Learning Outcomes (SLOs) at the course, program, and degree level. SLOs are “overarching outcomes” that result from students: 1. completing a course; 2. completing a certificated program or associates degree; or 3. receiving a support service. WASC’s standards require that all institutions identify and assess Student Learning Outcomes (SLO) for its instructional and non-instructional programs.

The concept of identifying and assessing SLOs fits well with programs in the Instructional and Student and Learning Services areas; however, for programs in the President and Administrative Services areas the fit is not as good. Therefore, ECC has decided to use **SLOs** to refer to overarching outcomes for its instructional and student support service programs (e.g., Spanish, Math, Counseling, Transfer Center, etc.) and use **Support Service Outcomes (SSOs)** to refer to its non-instructional programs of the President’s and Administrative Services areas (e.g., help desk, custodial, safety services, alumni office, etc.). To meet mandates set by WASC, ECC has decided to ask its instructional and non-instructional programs to identify and assess its program SLOs and SSOs in its planning process. Specifically, in the program review and annual program plans. The definitions of SLOs and SSOs are described below:

##### **Student Learning Outcomes (SLOs)**

Student Learning Outcomes are overarching outcomes that faculty agree students must achieve upon completion of a sequence or cluster of courses leading to a certificate, degree or specific body of knowledge. See ECC’s SLO website at <http://www.elcamino.edu/academics/slo/definitions.asp> for additional information on writing SLOs.

## SECTION IV: CREATE A PLAN

Guide, 2000)<sup>2</sup>:

- **Impact** — SSO concerned with gains you want those you serve to make — for example, what will students, faculty, staff, and others think, know, or do following the provision of your core services or activities.
- **Quality** — SSO concerned with accomplishing a specific standard of quality in your core services, processes, or activities such as:
  - level or volume of activity or service
  - efficiency with which you conduct the processes
  - compliance with external standards or regulations

The SSOs like SLOs need to be measurable. In other words, the outcome should be one for which it is feasible to collect accurate and reliable data (Smelin et al., 2005)<sup>1</sup>. Consider the following questions:

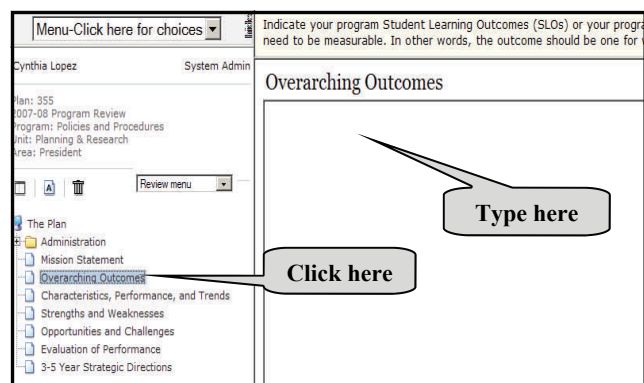
1. What is my program’s mission statement. What services or processes do I state in my mission statement that I will accomplish?
2. What are the broadest overarching outcomes that I intend to produce as a result of the stated services or processes in my mission statement?
3. What will my students or other clientele groups (e.g., employees, community members, etc.) think (e.g., attitudes, values), know, or do (e.g., skills, abilities, behaviors) following the provision of my program’s core services and/or activities? You need to write your SSOs in specific measurable terms.
4. What do I expect to accomplish with my core services, activities, or processes? What is the level of quality or efficiency in my services, activities, or processes? Specify an end result to be achieved rather than an action to be implemented (Smelin et al., 2005)<sup>1</sup>.
5. What are the most important results or impacts that should occur as a result of my program’s services and/or activities?

Describe your SLOs and SSOs in this section.

- Click the “**Sections from previous plan**” field, if not already clicked.
- Click the “**Overarching Outcomes**” field.
- Type in your SLOs or SSOs.

<sup>1</sup>Selim, B. R., J. Pet-Armacost, A. Alber, and P. S. Krist (2005b). *Program Assessment Handbook: Guidelines for Planning and Implementing Quality Enhancing Efforts of Program and Student Learning Outcomes*.

<sup>2</sup>WEAVE: *A Quality Enhancement Guide for Academic Programs and Administrative and Educational Support Units*. (2000, April). Virginia Commonwealth University.



### PERFORMANCE OF PROGRAM SLOs or SSOs

In addition to your program’s characteristics, performance, and trends, please include data that document the performance

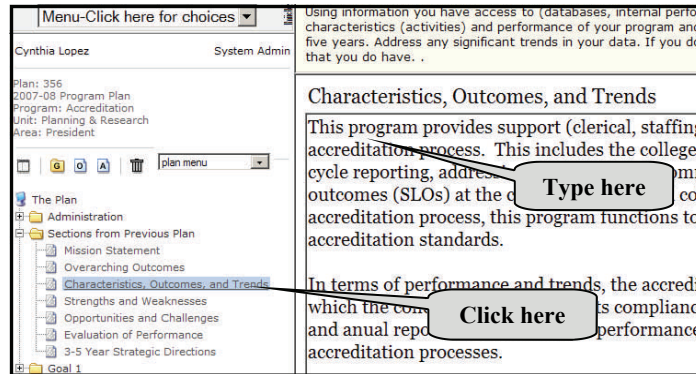
## SECTION IV: CREATE A PLAN

### Step 7: To enter or update your characteristics, outcomes, and trends.

- Click the “Sections from previous plan” field, if not already clicked.
- Click the “Characteristics, Outcomes, and Trends” field. Note: The label has changed to help remind you to include a review of your program SLOs or SSOs attainment.

#### No Previous Online Plan

- Go to your existing plan, highlight and copy your characteristics, performance, and trends.
- Paste your characteristics, performance, and trends in this section.
- In addition to your program’s characteristics, performance and trends, you need to present data that document the performance of your program SLOs or SSOs. See below for instructions.
- Review this section, and make any necessary updates.



of your program SLOs or SSOs. Note: it is realized that 2008-09 plans are the first to incorporate SLOs and SSOs. Therefore, this first year you may need to work on documentation, but it is expected that more documentation of SLOs and SSOs attainment will be provided each year thereafter. Below are instructions on how to assess your SLOs and SSOs:

#### Student Learning Outcomes (SLOs)

For instruction on how to assess your SLOs, please see ECC’s SLO website at:

<http://www.elcamino.edu/academics/slo/>

#### Support Service Outcomes (SSOs)

Consider the following questions:

1. What change did my program’s core services and/or activities services produce in my students or other clientele groups (e.g., employees, community members, etc.)? What data document the change? Present data that document the change.
2. Did I accomplish the level of quality or efficiency in my services, activities, or processes? What was the end result? What data document the results? Present data that document the level of quality or efficiency.

#### Previous Online Plan

- These are the characteristics, outcomes, and trends that rolled over from your previous online plan.
- In addition to your program’s characteristics, performance and trends, you need to present data that document the performance of your program SLOs or SSOs. See below for instructions.
- Review this section, and make any necessary updates.

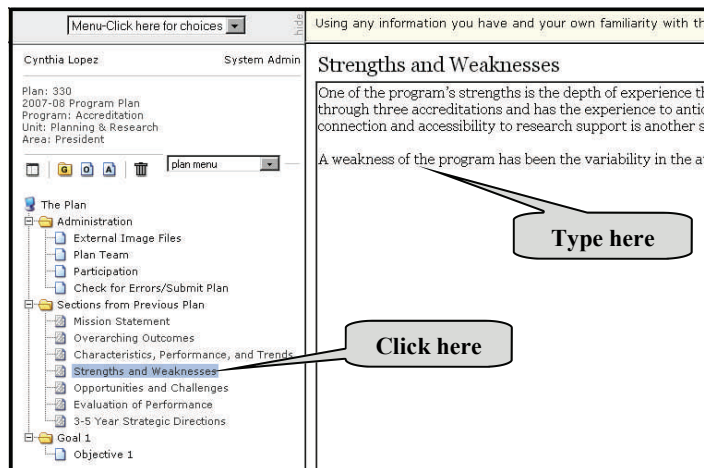
## SECTION IV: CREATE A PLAN

### Step 8: To enter or update your strengths and weaknesses.

- Click the “Sections from previous plan” field, if not already clicked.
- Click the ”Strengths and Weaknesses” field.

#### No Previous Online Plan

- Go to any existing data (probably a Word document), highlight and copy the strengths and weaknesses.
- Paste the strengths and weaknesses in this section.
- Review this section, and make any necessary updates.



#### Previous Online Plan

- These are the strengths and weaknesses that rolled over from your previous online plan.
- Review this section, and make any necessary updates.

### Step 10: To enter or update your evaluation of performance section.

The “Evaluation of Performance” section is based upon an analysis of the

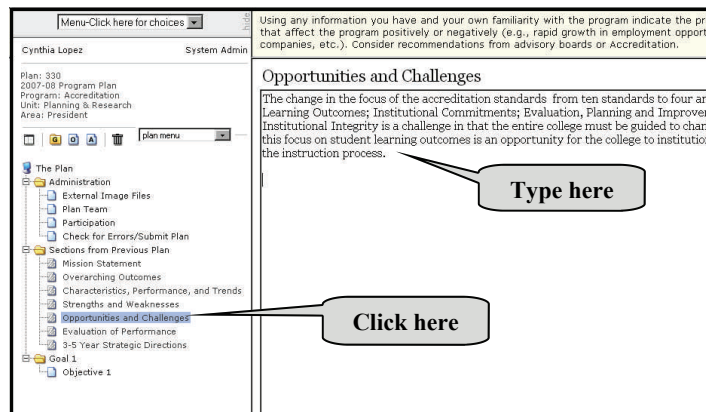
update your evaluation

### Step 9: To enter or update your opportunities and challenges.

- Click the “Sections from previous plan” field, if not already clicked.
- Click the ”Opportunities and Challenges” field.

#### No Previous Online Plan

- Go to your existing plan, highlight and copy the opportunities and challenges.
- Paste the opportunities and challenges in this section.
- Review this section, and make any necessary updates.



#### Previous Online Plan

- These are the opportunities and challenges that rolled over from your previous online plan.
- Review this section, and make any necessary updates.

data in the previous sections, state how well the program is doing and what changes may be needed. Include any changes you need to make to the program in order to accomplish your SLOs or SSOs.

- Click the “Sections from previous plan” field, if not already clicked.
- Click the ”Evaluation of Performance” field.

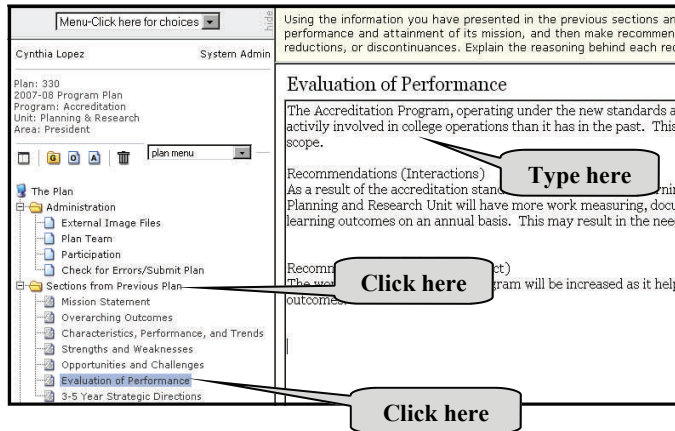
## SECTION IV: CREATE A PLAN

### Step 11: To enter or update your 3-5 year strategic directions.

- Click the “Sections from previous plan” field, if not already clicked.
- Click the “3-5 Year Strategic Directions” field.

#### No Previous Online Plan

- Go to your existing plan, highlight and copy your evaluation recommendations.
- Paste your evaluation recommendation in this section.
- Review your evaluation recommendations, and make any necessary updates.
- Include any changes you need to make to the program based on your SLOs’ or SSOs’ performance.



#### Previous Online Plan

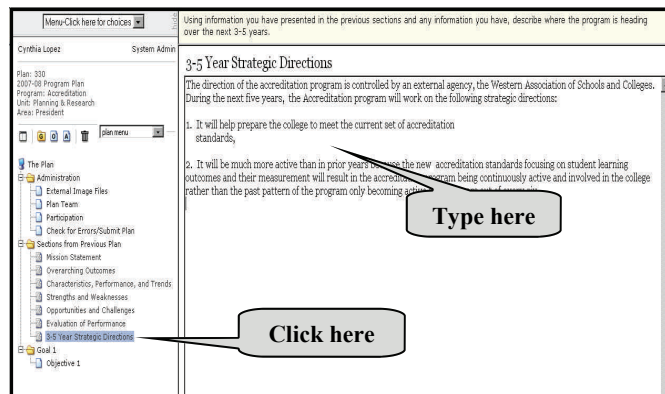
- These are the sections that rolled over from your previous online plan; recommendations evaluation, interactions, and planning impact, respectively.
- Review the text and determine what you want to keep, delete, or modify.
- Review your evaluation recommendations, and make any necessary updates.
- Include any changes you need to make to the program based on your SLOs’ or SSOs’ performance.

### Step 12: To enter or update your Goal 1.

- Click the “Goal 1” field (located on the left side of the screen).

#### No Previous Online Plan

- Go to your existing plan (probably a Word document), highlight and copy the 3-5 year strategic directions.
- Paste your strategic directions in this section.
- Review your strategic directions, and make any necessary updates.



#### Previous Online Plan

- These are the strategic directions that rolled over from your previous online plan.
- Review your strategic directions, and make any necessary updates.



## SECTION IV: CREATE A PLAN

### No Previous Online Plan

- Go to your existing plan, highlight and copy Goal 1.
- **PLEASE NOTE:** Copy goals that you plan to carry out during the year for which the plan is being created. In this case, during 2008-2009.. Do not include goals that you have completed.
- Paste your top priority goal in the “Goal 1” section of your online plan.
- Indicate whether your goal is short-term (1 year) or long-term (2-5 years) by clicking on one of the options located right above the description of the goal.
- Review this section, and make any necessary updates.

The screenshot shows the 'Goal 1' section of an online plan. The left sidebar contains a tree view with 'Goal 1' selected. The main content area has a 'Goal:' label and a 'Type here' callout. Above the goal type are radio buttons for 'Short-term goal (1year)' and 'Long-term goal (2-5 years)'. Below the goal type is an 'Evaluation:' label with a 'Click here' callout.

### **Step 13: To enter or update the evaluation of Goal 1.**

- Click in the “Evaluation” section of your online plan (under the “Goal 1” section). In this section, you need to state how you will determine if your goal is achieved.

### Previous Online Plan

- This is the goal that rolled over from your previous online plan.
- **PLEASE NOTE:** Keep goals that you plan to carry out during the year for which the plan is being created. In this case, during 2008-2009. Do not keep goals that you have completed or abandoned.
- Review this section, and make any necessary updates.



**TIP!** See page 27 for instructions on how to add additional goals. Also, see page 28 for instructions on how to change the order of your goals.

### **Step 14: To enter or update Objective 1 of Goal 1.**

- Click on the [+] sign next to “Goal 1” to open your “Goal 1” folder and show the objective(s) under your goal.

### No Previous Online Plan

- Go to your existing plan, highlight and copy the evaluation of Goal 1.
- Paste the evaluation of Goal 1 in this section.
- Review this section, and make any necessary updates.

The screenshot shows the 'Objective 1' section under 'Goal 1'. The left sidebar contains a tree view with 'Objective 1' selected. The main content area has a 'Type here' callout. Below the objective type is an 'Evaluation:' label.

- Click the “Objective 1” field located on the left side of the screen.

### Previous Online Plan

- This is the evaluation of Goal 1 that rolled over from your previous online plan.
- Review this section, and make any necessary updates.

## SECTION IV: CREATE A PLAN

### No Previous Online Plan

- Go to your existing plan, highlight and copy Objective 1 of Goal 1.

#### **PLEASE NOTE:**

- Copy objectives that you plan to carry out during 2008-2009. Do not include objectives that you have completed.
- Paste Objective 1 of Goal 1 in this section.
- Review this section, and make any necessary updates.

The screenshot shows a web-based interface for creating a plan. On the left is a navigation tree with categories like 'Administration', 'Participation', and 'Goal 1'. Under 'Goal 1', 'Objective 1' is selected. The main content area is titled 'Objective 1.1' and contains a text box for describing the objective. Below the text box are several checkboxes for indicating resource requirements: 'This objective impacts other Programs, Units, and/or Areas.', 'There are existing resources that will be used to carry out this objective.', 'This objective requires resources from other sources.', 'This objective requires additional personnel.', 'This objective requires additional technology.', and 'This objective requires additional space or changes to facilities.' Two callout boxes are present: one pointing to the text box with the text 'Type here' and another pointing to the first checkbox with the text 'Click here'.

### Previous Online Plan

- This is the objective that rolled over, with its goal, from your previous online plan.
- **PLEASE NOTE:** Copy objectives that you plan to carry out during 2008-2009. Do not include objectives that you have completed or abandoned.
- Review this section, and make any necessary updates.



**TIP!** See page 27 for instructions on how to add additional objectives. Also, see page 28 for instructions on how to change the order of your objectives.

### **Step 15: To indicate or update that your objective will have an impact.**

If the objective you have just entered will have an impact on another program, unit, or area, you need to indicate the impact in this section.

### **ATTENTION—PLEASE READ BEFORE YOU PROCEED**

Under each objective are a series of boxes that can be checked to provide more information about your objective. Click each item that applies. For each box you check, the supporting information boxes will appear underneath the series of boxes in your plan. **Please do not click the box and then type in “None” in the section.** Click only the boxes that refer to the resources you will need to carry out your objective. If you clicked in a box by accident, unclick the box. This will remove the section you created.

## SECTION IV: CREATE A PLAN

### No Previous Online Plan

- Click in the box next to the **“This objective impacts other Programs, Units, and/or Areas”** sentence.
- The **“Impact of Objective on Other Programs, Units, and/or Areas”** section will appear.
- Select the impacted area, unit, and/or program, then click the **“Add Impact”** box.
- Go to your existing plan, highlight and copy the impact that the objective will have on other programs, units, and/or areas.
- Paste the impact of your objective in the **“Explain the impact here”** section of your online plan.
- Review this section, and make any necessary updates.

The screenshot shows a web-based interface for creating a plan. On the left is a sidebar with a tree view containing items like 'Administration', 'The Plan', 'Mission Statement', 'Overarching Outcomes', 'Characteristics, Performance, and Trends', 'Strengths and Weaknesses', 'Opportunities and Challenges', 'Evaluation of Performance', '3-5 Year Strategic Directions', 'Goal 1', and 'Objective 1'. The main area is titled 'Describe the specific step necessary to accomplish the goal.' and contains a text box with the text 'IPRO will begin developing procedures and tools to measure student learning outcomes.' Below this is a section titled 'Click the [ ] next to the statements that apply to this objective. Fill out the form that is created below the statements.' with several checkboxes: 'This objective impacts other Programs, Units, and/or Areas.' (checked), 'There are existing resources that will be used to carry out this objective.', 'This objective requires resources from other sources.', 'This objective requires additional personnel.', 'This objective requires additional budget.', 'This objective requires additional technology.', and 'This objective requires additional space.' Below this is a section titled 'Impact of Objective on Other Programs, Units, and/or Areas' with a dropdown menu for 'Instruction' and a text area for 'Explain the impact here:'. Callout boxes with speech bubbles point to the checked checkbox, the 'Add Impact' button, and the text area.

### Previous Online Plan

- If the box next to the **“This objective impacts other Programs, Units, and/or Areas”** sentence is checked, this is the **“Impact of Objective on Other Programs, Units, and/or Areas”** section that rolled over from your previous online plan.
- Review this section, and make any necessary updates.

To indicate that your objective will impact more than one program, unit, or area.

- ◆ For your first impact, follow Step 15.
- ◆ For your second impact, click the **“Add another”** field located right above the section where you explained the impact of your first impact. Then, follow Step 15. If you created a second impact by accident, remove the impact by clicking on the **“Remove this impact”** field.



### TIP!

**Step 16:** To indicate or update that your objective will be carried out with existing resources.

**Step 17a:** To indicate or update that your objective requires resources from other sources.



## SECTION IV: CREATE A PLAN

### No Previous Online Plan

- Click in the box next to the **“There are existing resources that will be used to carry out this objective”** sentence.
- The **“Existing Resources”** section will appear.
- Go to your existing plan, highlight and copy the existing resources.
- Paste the existing resources in the **“Existing Resources”** section of your online plan.
- Review this section, and make any necessary updates.

### Step 17b: To enter or update the resource from

Describe the specific step necessary to accomplish the goal.

Objective 1.1

Describe the specific step necessary to accomplish the goal.

[PRO will begin developing procedures and tools to measure student learning outcomes.

Click the box next to the statements that apply to this objective. Fill out the form that is created below the statements.

This objective impacts other Programs, Units, and/or Areas.

There are existing resources that will be used to carry out this objective.

This objective requires resources from other sources.

This objective requires additional personnel.

This objective requires additional budget.

This objective requires additional technology.

This objective requires additional space or changes to facilities.

Existing Resources

Indicate existing resources that will be used to carry out this objective:

**Fund 15, VTEA, or Matriculation section.**

### Previous Online Plan

- If the box next to the **“There are existing resources that will be used to carry out this objective”** sentence is checked, this is the **“Existing Resources”** section that rolled over from your previous online plan.
- Review this section, and make any necessary updates.

## ATTENTION—PLEASE READ BEFORE YOU PROCEED

Follow Steps 17a and 17b or 17c to indicate that your objective requires resources from other sources.

### No Previous Online Plan

- Click in the box next to the **“This objective requires resources from other sources”** sentence.
- The **“Resources from Other Sources”** section will appear.
- Select the source of funds (e.g., Fund 11, Fund 15, VTEA, etc.) from the **“source list,”** then click the **“Add Source”** box.
- If you have selected Fund 15, VTEA, or Matriculation, go to Step 17b. If you have selected Grant or other sources, go to Step 17c.

Describe the specific step necessary to accomplish the goal.

Objective 1.1

Describe the specific step necessary to accomplish the goal.

[PRO will begin developing procedures and tools to measure student learning outcomes.

Click the box next to the statements that apply to this objective. Fill out the form that is created below the statements.

This objective impacts other Programs, Units, and/or Areas.

There are existing resources that will be used to carry out this objective.

This objective requires resources from other sources.

This objective requires additional personnel.

This objective requires additional budget.

This objective requires additional technology.

This objective requires additional space or changes to facilities.

Resources From Other Sources

Select the source of funds, then click the 'Add Source' button.

Source list

Source list

PFE

VTEA

Matriculation

Grant

Other

### Previous Online Plan

- If the box next to the **“This objective requires resources from other sources”** sentence is checked, this is the **“Resources from Other Sources”** section that rolled over from your previous online plan.
- Review this section, and make any necessary updates.

## SECTION IV: CREATE A PLAN

### No Previous Online Plan

- Click the downward arrow next to the **“Required for how long”** sentence and select the number of years the resource is required. In other words, if you will need VTEA funds for two years to carryout this objective, indicate it here.
- Go to your existing plan, highlight and copy the requested amount. Paste or type in the requested amount in the **“Requested Amount”** section of your online plan.
- Go to your existing plan, highlight and copy. Paste or type in the amount received in the **“Amount Received”** section of your online plan.
- Go to your existing plan, highlight and copy the explanation of the difference between the amounts. Paste your explanation of the difference between the amounts in the **“Explain the difference between the amounts”** section of your online plan.
- Review this section, and make any necessary updates.

The screenshot shows a web-based interface for creating a plan. On the left is a navigation menu with items like 'The Plan', 'Administration', 'Sections from Previous Plan', 'Goal 1', and 'Objective 1'. The main area is titled 'Describe the specific step necessary to accomplish the goal.' and contains a text area with the text 'IPRO will begin developing procedures and tools to measure student learning outcomes.' Below this are several checkboxes for selecting applicable statements, such as 'This objective impacts other Programs, Units, and/or Areas.' and 'This objective requires resources from other sources.' (which is checked). The 'Resources From Other Sources' section includes a dropdown for 'Select the source of funds, then click the 'Add Source' button.' with 'PFE' selected. Below this are fields for 'Required for how long:', 'Requested Amount: \$', and 'Amount Received: \$'. A callout box with the text 'Type here' points to a text area labeled 'Explain the difference between the amounts:'. There are also 'Remove this source' and 'Add another' buttons.

### Previous Online Plan

- This is the resources from Fund 15, VTEA, or Matriculation section that rolled over from your previous online plan.
- Click the downward arrow next to the **“Required for how long”** sentence and select the number of years the resource is required. For instance, if you will need VTEA funds for two years to carryout your objective, indicate it here.
- Review this section, and make any necessary updates.

**To indicate that your objective will require resources from more than one source.**

- ◆ For your first source, follow Steps 17a and 17b.
- ◆ For your second source, click the **“Add another”** field located right above the section where you explained the difference between the amounts.
- ◆ Select the source of funds (e.g., Fund 11, Fund 15, VTEA, etc.) from the **“source list,”** then click the **“Add Source”** box. The **“Resources from Other”** section for your second source will come up right above your first source. Then, follow Step 17b or 17c. If you created a second source by accident, remove the source by clicking on the **“Remove this source”** field.

**Step 17c: To enter or update the resources from a grant or other sources section.**



**TIP!**

## SECTION IV: CREATE A PLAN

### No Previous Online Plan

- Select “Grant” from the “source of funds list.” The “Enter the name of the grant” section will come up.
- Go to your existing plan, highlight and copy the name of the grant. Paste the name of the grant in the “Enter the name of the grant” section of your online plan.
- Click the “Add Source” box.
- Click the downward arrow next to the “Required for how long” sentence and select the number of years the resource is required.

### Previous Online Plan

- This is the resources from a grant or other sources section that rolled over from your previous online plan.
- Click the downward arrow next to the “Required for how long” sentence and select the number of years the resource is required.
- Review this section, and make any necessary updates.

- Go to your existing plan, highlight and copy the requested amount or type in an amount. Paste or type in the requested amount in the “Requested Amount” section of your online plan.
- Go to your existing plan, highlight and copy the amount received or type in an amount. Paste or type in the amount received in the “Amount Received” section of your online plan.
- Go to your existing plan, highlight and copy the explanation of the difference between the amounts. Paste your explanation of the difference between the amounts in the “Explain the difference between the amounts” section of your online plan.
- Review the section, and make any necessary updates.



#### TIP!

To indicate that your objective will require resources from more than one source.

- ◆ For your first source, follow Steps 17a and 17c.

**Step 18a:** To indicate that the objective requires additional personnel.

- ◆ For your second source, click on the “Add another” field located right above the section where you explained the difference between the amounts.
- ◆ Select the source of funds (e.g., Fund 11, Fund 15, VTEA, etc.) from the “source list,” then click on the “Add Source” box. The “Resources from Other” section for your second source will come up right above your first source. Then, follow Step 17b or 17c. If you created a second source by accident, remove the source by clicking on the “Remove this source” field.

update

## SECTION IV: CREATE A PLAN

### ATTENTION—PLEASE READ BEFORE YOU PROCEED

Follow Steps 18a and 18b to indicate that your objective requires additional personnel.

#### No Previous Online Plan

- Click in the box next to the **“This objective requires additional personnel”** sentence.
- The **“Additional Personnel”** section will come up.
- Select the classification of the position (faculty, unclassified staff, etc.). Note that the classification of the position is not the method of payment (stipends, reassignment, etc.).
- You will be able to describe the method of payment in the **“Position Description”** section (see Step 18b) of the online plan. The classification of the position is the job classification that a manager would indicate on the personnel documents submitted to payroll.
- Click the **“Add Position”** box.
- Review this section, and make any necessary updates.

The screenshot shows a web interface for creating a plan. On the left, a sidebar lists the plan structure: 'The Plan', 'Administration', 'Sections from Previous Plan', 'Goal 1', and 'Objective 1'. The main area is titled 'Objective 1.1' and contains a text box for describing the step necessary to accomplish the goal. Below this, there are several checkboxes for selecting resources: 'This objective requires additional personnel' (checked), 'This objective requires additional budget', 'This objective requires additional technical resources', and 'This objective requires additional space'. An 'Additional Personnel' section is visible at the bottom, with a dropdown menu for 'position classification list' and an 'Add Position' button. A callout box points to the 'Click here' text above the 'Additional Personnel' section, and another callout box points to the 'Click here' text above the 'Additional Personnel' section.

#### Previous Online Plan

- If the box next to the **“This objective requires additional personnel”** sentence is checked, this is the personnel request that rolled over from your previous online plan.
- Review this section, and make any necessary updates.

The classification of the position is the job classification that a manager would indicate on the personnel documents submitted to payroll.

#### **Step 18b: To enter or update the description of the position.**



**TIP!**

## SECTION IV: CREATE A PLAN

### No Previous Online Plan

- Click the downward arrow next to the **“Required for how long”** sentence and select the number of years the position is required.
- Go to your existing plan, highlight and copy the description of the position.
- Paste the description of the position in the **“Position Description”** section of your online plan.
- Go to your existing plan, highlight and copy the estimated cost.
- Paste the estimated cost in the **“Estimated Cost”** section of your online plan.
- Go to your existing plan, highlight and copy the supporting rationale.
- Paste the supporting rationale in the **“Supporting Rationale”** section of your online plan.
- Review this section, and make any necessary updates.

Describe the specific step necessary to accomplish the goal.  
Click the box next to the statements that apply to this objective. Fill out the form that is created below the statements.

This objective impacts other Programs, Units, and/or Areas.  
 There are existing resources that will be used to carry out this objective.  
 This objective requires resources from other sources.  
 This objective requires additional personnel.  
 This objective requires additional budget.  
 This objective requires additional technology.  
 This objective requires additional space or changes to facilities.

**Additional Personnel**  
Select the classification of the job, then click 'Add Position'.  
Classified Staff Add Position

Position Classification: Classified Staff  
Required for how long: [dropdown]  
Position Description: [text area]  
Estimated Cost: \$ [text input]  
Supporting Rationale: [text area]

Remove this position

### Previous Online Plan

- This is the description of the position that rolled over from your previous online plan.
- Click the downward arrow next to the **“Required for how long”** sentence and select the number of years the position is required.
- Review this section, and make any necessary updates.

**To indicate that your objective will require a request for more than one personnel position.**

- ◆ For your first request, follow Steps 18a and 18b.
- ◆ For your second request, select the classification of the position (faculty, unclassified staff, etc.), and then click the **“Add Position”** box. The **“Position Description”** section for your second position will come up right above your first request. Then, follow Step 18b. If you created a second position by accident, remove the request by clicking on the **“Remove this position”** field.

**Step 19a: To indicate or update that the objective requires additional budget.**

**TIP!**

**Step 19b:** To enter or update the amount and description of the additional budget section.



## SECTION IV: CREATE A PLAN

### ATTENTION—PLEASE READ BEFORE YOU PROCEED

Follow Steps 19a and 19b to indicate that your objective requires additional budget.

#### No Previous Online Plan

- Click in the box next to the **“This objective requires additional budget”** sentence.
- The **“Additional Budget”** section will come up.
- Select the object code category, and then click on the **“Add Budget Request”** box.
- Review this section, and make any necessary updates.

The screenshot shows a web interface for creating a plan. On the left is a navigation menu with 'Objective 1' selected. The main area is titled 'Objective 1.1' and contains several checkboxes for selecting resources. The 'Additional Budget' section is visible at the bottom, with a dropdown menu for object code categories and an 'Add Budget Request' button. Two callout bubbles are present: one pointing to the 'Add Budget Request' button with the text 'Click here', and another pointing to the 'Additional Budget' section header with the text 'Click here'.

#### Previous Online Plan

- If the box next to the **“This objective requires additional budget”** sentence is checked, this is the additional budget request that rolled over from your previous online plan.
- Review this section, and make any necessary updates.

#### No Previous Online Plan

- Click the downward arrow next to the **“Required for how long”** sentence and select the number of years the additional budget is required.
- Go to your existing plan, highlight and copy the requested amount. Paste the requested amount in the **“Requested Amount”** section of your online plan.
- Go to your existing plan, highlight and copy the description. Paste the description in the **“Description”** section of your online plan.
- Go to your existing plan, highlight and copy the supporting rationale. Paste the supporting rationale in the **“Supporting Rationale”** section of your online plan.
- Review your objective, and make any necessary updates.

The screenshot shows the same web interface as the previous one, but with the 'Additional Budget' section expanded. It includes a 'Required for how long' dropdown menu, a 'Requested Amount' field, and a 'Description' field. Two callout bubbles are present: one pointing to the 'Add Budget Request' button with the text 'Click here', and another pointing to the 'Requested Amount' field with the text 'Type here'.

#### Previous Online Plan

- This is the additional budget request that rolled over from your previous online plan.
- Click the downward arrow next to the **“Required for how long”** sentence and select the number of years the additional budget is required.
- Review this section, and make any necessary updates.

**Step 20a: To indicate or update that the objective requires additional technology.**

## SECTION IV: CREATE A PLAN

### ATTENTION—PLEASE READ

Follow Steps 20a and 20b to indicate that your objective requires additional technology.

#### No Previous Online Plan

- Click in the box next to the **“This objective requires additional technology”** sentence.
- The **“Additional Technology”** section will come up.
- Select a classification for the technology you will need from the **“Technology classification list,”** and then click on the **“Add Technology”** box.
- Review this section, and make any necessary updates.

The screenshot shows a web-based interface for creating a plan. On the left is a navigation tree with 'Objective 1' selected. The main area is titled 'Objective 1.1' and contains a text box for describing the goal. Below this are several checkboxes for selecting applicable statements, with a 'Click here' callout pointing to the 'This objective requires additional technology' option. At the bottom, there is an 'Additional Technology' section with a dropdown menu for 'Technology classification list' and an 'Add Technology' button. Another 'Click here' callout points to the 'Add Technology' button.

#### Previous Online Plan

- If the box next to the **“This objective requires additional technology”** sentence is checked, this is the technology request that rolled over from your previous online plan.
- Review this section, and make any necessary updates.

**Step 20b: To enter or update the additional technology information section.**

## SECTION IV: CREATE A PLAN

### No Previous Online Plan

- Go to your existing plan, highlight and copy the requested amount. Paste or type in the requested amount in the **“Requested Amount”** section of your online plan.
- Go to your existing plan, highlight and copy the description of the technology. Paste the description of the technology in the **“Description of Technology”** section of your online plan.
- Go to your existing plan, highlight and copy the answer to Question 1.
- Paste the answer to Question 1 in the section of Question 1 (what do you want to do or accomplish with this technology?) of your online plan.
- Go to your existing plan, highlight and copy the answer to Question 2.
- Paste the answer to Question 2 in the section of Question 2 (where is the physical location that the technology will be installed?) of your online plan.
- Click the downward arrow next to the **“Is this replacing an existing piece of equipment or is it a new installation?”** question to answer Question 3.
- Click the box next to each service (electricity, internet access, etc.) that you will need if the technology is provided.
- Review this section, and make any necessary updates.

**Step 21: To indicate or that the objective requires additional space changes to facilities.**

### Previous Online Plan

- This is the additional budget request that rolled over from your previous online plan.
- Review this section, and make any necessary updates.



**TIP!** To indicate that your objective will require more than one technology request.

- ◆ For your first technology request, follow Steps 20a and 20b.
- ◆ For your second technology request, select the classification of your technology from the **“Technology classification list,”** and then click on the **“Add Technology”** box. The **“Description of Technology”** section for your second technology request will come up right above your first technology request. Then, follow Step 20b. If you created a second technology request by accident, remove the request by clicking on the **“Remove this technology”** field.

**update  
or**



## SECTION IV: CREATE A PLAN

### No Previous Online Plan

- Click the box next to the “**This objective requires additional space or changes to facilities**” sentence.
- The “**Additional Space or Changes to Facilities**” section will come up.
- Go to your existing plan, highlight and copy the requested amount.
- Paste or type in the requested amount in the “**Requested Amount**” section of your online plan.
- Go to your existing plan, highlight and copy the description of the need.
- Paste the description of the need in the “**Description of Need**” section of your online plan.
- Go to your existing plan, highlight and copy the answer to Question 1.
- Paste the answer to Question 1 in the section of Question 1 (what do you want to do or accomplish with this space or modification?) of your online plan.
- Go to your existing plan, highlight and copy the answer to Question 2.
- Paste the answer to Question 2 in the section of Question 2 (where is the physical location of the space?) of your online plan.
- Click the box next to each service (electricity, water, etc.) that you will need if the space is provided (Question 3).
- Review this section, and make any necessary updates.

### Previous Online Plan

- If the box next to the “**This objective requires additional space or changes to facilities**” sentence is checked, this is the additional space or changes to facilities section that rolled over from your previous online plan.
- Review this section, and make any necessary updates.

The screenshot shows a web-based interface for creating a plan. On the left is a navigation pane with a tree view containing 'The Plan', 'Administration', 'Sections from Previous Plan', 'Goal 1', and 'Objective 1'. The main content area is titled 'Describe the specific step necessary to accomplish the goal.' and contains several checkboxes for selecting resources and services. A callout bubble labeled 'Click here' points to the 'Additional Space or Changes to Facilities' section. Another callout labeled 'Type here' points to the 'Requested Amount' field. A third callout labeled 'Type here' points to the 'Description of Need' text area. Below this are three numbered questions: 1. 'What do you want to do or accomplish with this space or modification?', 2. 'Where is the physical location of the space (room number is preferred)?', and 3. 'Check the box next to each service that you will need if the space is provided.' with checkboxes for electricity, water, special heat/air conditioning needs, and waste disposal (sewer).

## SECTION V: SIGN-OFF ON A PLAN

### Step 22: To sign-off on a plan.

WASC requires institutions to show proof that plans were developed by a representative group of the entire program, unit, or area. WASC also requires that institutions show proof that the results of a plan are communicated to all the individuals in the program, unit, or area. The online system has been designed to help you provide evidence to WASC that your plan was developed by a representative group and that the results of the plan were communicated to constituents in your program, unit, or area. **This step is very important and should not be overlooked.**

First, all program, unit, and area managers need to ask individuals on their Planning Team to sign-off on a plan. Second, all program, unit, and area managers need to let employees in their program, unit, and area know that they can review the plan on the online system. This will ensure that results of the plan are communicated to all the employees in the program, unit, or area. Please ask individuals to follow the steps below:

#### **1st Step: Log-on to the System and Locate the Plan**

- Log on to the online planning system (see Step 1 on page 2).
- Click the “**Sign-Off on a Plan**” box. Locate the plan (see page 4).

#### **2nd Step: Sign-off on a Plan**

##### **-Individuals Who can Only Edit the Development of the Plan (Cannot Edit the Plan)**

- Review the plan.
- Click the “**Administration**” field (located on the left side of the screen).
- Click the “**Participation**” field.
- Click the “**reviewed**” word in the “**I acknowledge that while I was not involved in the development of this plan, I have reviewed it**” (located on the upper left side). After you click the “**reviewed**” word, your name will automatically appear under the “**Participant List for this Plan**” section.

##### **-Individuals Who can Only Acknowledge Participation in the Development of the Plan (Cannot Edit the Plan)**

- Review the plan.
- Click the “**participated**” word in the “**I acknowledge that I participated in the development of this plan**” sentence (located in the upper left side). After you click the “**participated**” word, your name will automatically appear under the “**Participant List for this Plan**” section.

##### **-Individuals Who can Edit and Acknowledge Participation in the Development of the Plan**

- Review the plan.
- Click the “**Administration**” field (located on the left side of the screen).
- Click the “**Participation**” field.
- Click the “**participated**” word in the “**I acknowledge that I participated in the development of this plan**” sentence. After you click the “**participated**” word, your name will automatically appear under the “**Participant List for this Plan**” section.

##### **-Individuals Who can Only Review the Plan (Cannot Edit and Cannot Acknowledge Participation in Plan)**

- Review the plan.
- Click the “**reviewed**” word in the “**I acknowledge that while I was not involved in the development of this plan, I have reviewed it**” (located on the upper left side). After you click the “**reviewed**” word, your name will automatically appear under the “**Participant List for this Plan**” section. Note that any employee that has a ECC Network user name and password can sign-off as having reviewed a plan.

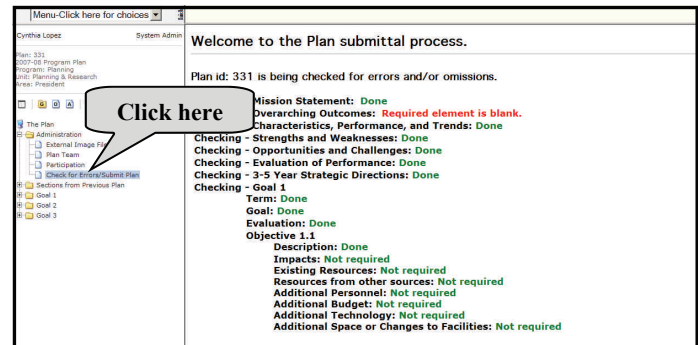
## SECTION VI: CHECK FOR ERRORS/SUBMIT A COMPLETED PLAN

### ATTENTION—PLEASE READ BEFORE YOU PROCEED

Before you submit your plan, please ask the members of your Planning Team to sign-off on the plan.

#### Step 23: To check for errors in a plan.


- Click the “Administration” field (located on the left side of the screen).
- Click the “Check for Errors/Submit Plan” field.
- The system will display “Done” (in green text) for each field you completed correctly.
- For each error (in red text), the system will give the reason for the error. The system will also display the number of errors in your plan (bottom of the screen). You will need to correct the errors. If you do not fix your errors, you will not be able to submit your completed plan.



- After you correct the errors you will get the “Submit” box at the bottom of your screen. See Step 24 for instructions on how to submit a completed online plan.

#### Step 24: To submit a completed online plan.

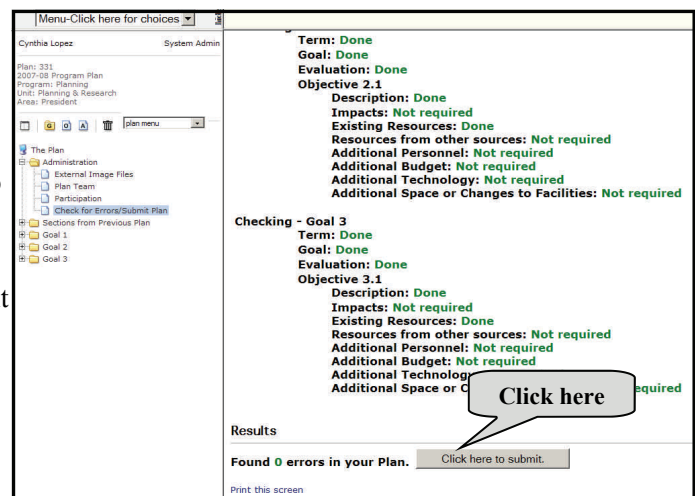
After you have fixed all the errors or your plan is free of errors, you can submit your plan.


 Do not submit your completed plan until all participants have signed off (see Step 22). After a plan is submitted, the participants and reviewers will not be able to sign-off.

#### TIP!

- Click the “Administration” field (located on the left side of the screen).
- Click the “Check for Errors/Submit Plan” field.
- If your plan is free of errors, the “Click here to submit” box will appear at the bottom of the screen.
- Click the “Click here to submit” box to submit your plan.

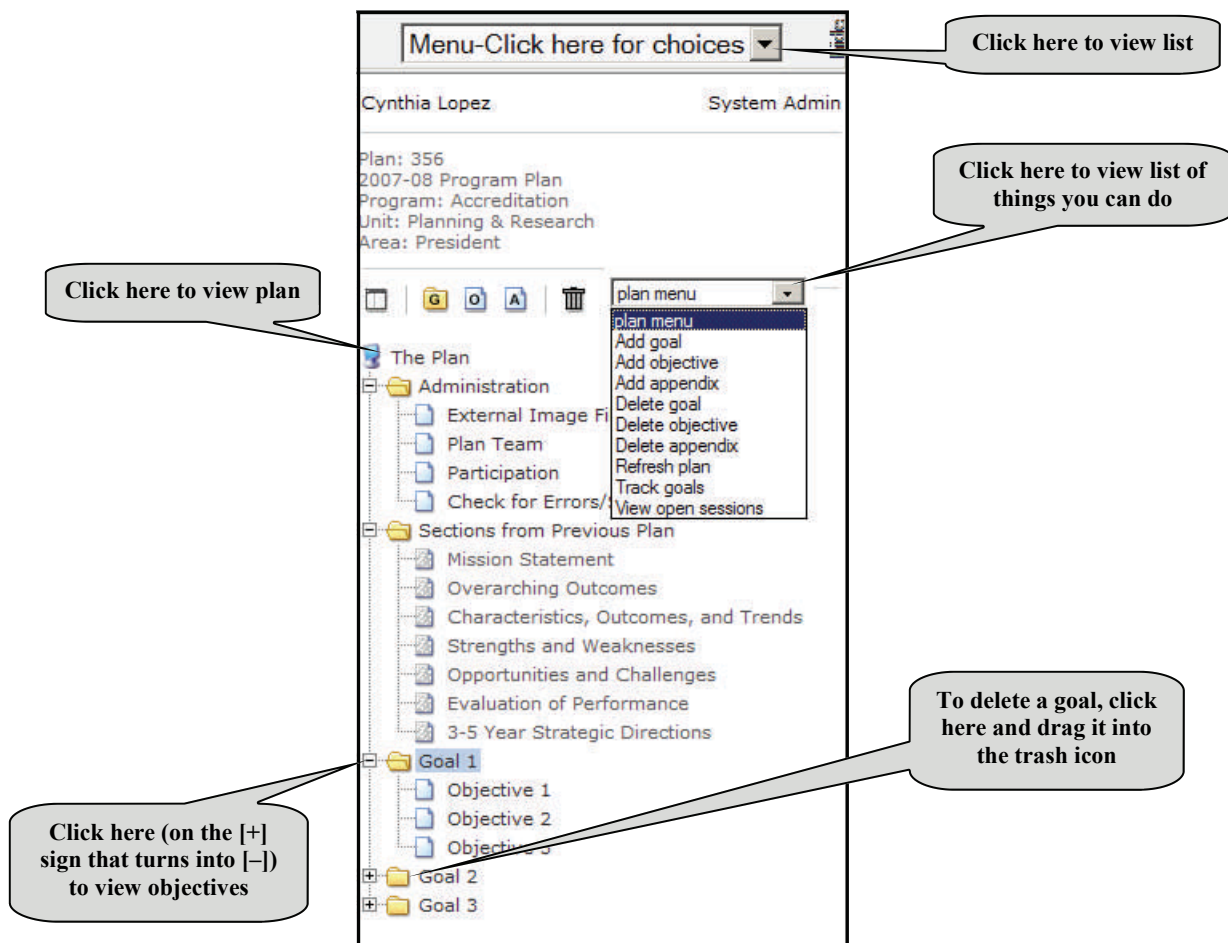
**Congratulations! You have successfully completed your plan.**



 If you submitted your plan by accident, please contact the Staff Development Office at extension 3871.

#### TIP!

## SECTION VII: TOOLS AVAILABLE




Listed below are tools available on the online system.

### SAVE INFORMATION YOU HAVE ENTERED OR PASTED

Steps: To save the information you have entered or pasted in your online plan.

- Enter or paste the information in the appropriate section. Note that if you have any special formatting such as special fonts, borders, bolding, font color, etc., it will not remain.
- Once you have entered or pasted the information in the section, go on to another section.
- When you leave a section, the system automatically saves the information you have entered or pasted.


 You cannot create or copy tables, charts, and/or pictures into your online plan. However, you can upload tables, charts, and/or pictures into your online plan (see pages 30 and 31 for instructions).

#### TIP!

### LOGOFF THE ONLINE SYSTEM

Steps: To logoff the online system.

- Click the “X” located on the top right hand corner of your screen.
- Or, click “File” located on the toolbar (left hand corner), and then click “Close.”

 The online system will automatically log you off when you stop working on it for an extended period of time.

#### TIP!

## SECTION VII: TOOLS AVAILABLE

### VIEW CONTENTS OF A FOLDER

Steps: To view contents of a folder.

- Click the [+] sign next to the icon to view contents of a folder.
- It will change from a [+] sign into a [-] sign (see figure on page 26).



### VIEW A PLAN

Steps: To view your online plan or to see how the plan will look when you print it.

- Click the “**The Plan**” field located at the top of the list (below the “**plan menu**” field).
- Your online plan will appear on the right hand side. Note that any new information you have entered or pasted in a section will be displayed.



### ADD A GOAL

Steps: To add an additional goal.

- Click the goal icon  located on the upper left hand side of the screen.
- Or, click the  downward arrow next to the “**plan menu**” field, and then select “**Add goal.**”
- After you click the goal icon or select “**Add goal**” on the “**plan menu**” field, the new goal will appear on the screen. The system will automatically add one objective when you add a goal.


### ADD AN OBJECTIVE

Steps: To add an additional objective.

- Click on the [+] sign next to “**Goal 1**” to open your “**Goal 1**” folder and show the objective(s) under your goal.
- Click the objective icon  located on the upper left hand side of the screen.
- Or, click the downward  arrow next to the “**plan menu**” field, and then select “**Add objective.**”
- After you click the objective icon or select “**Add objective**” on the “**plan menu**” field, the new objective will appear on the screen.

### ADD AN APPENDIX

Steps: To add an additional appendix.



- Click the appendix icon located on the upper left hand side of the screen.
- Or, click the downward  arrow next to the “**plan menu**” field, and then select “**Add appendix.**”
- After you click the appendix icon or select “**Add appendix**” on the “**plan menu**” field, the new appendix will appear on the screen.

## CHANGE THE ORDER OF A GOAL, OBJECTIVE, OR AN APPENDIX



## SECTION VII: TOOLS AVAILABLE

Steps: To change the order of a goal, objective, or an appendix.

### Change the order of a goal:

- Click the folder icon next to the goal you would like to change the order and drag it on top of the folder icon next to the goal number you would like it to change to. For example, if you want to change Goal 3 and its objectives into Goal 1, then click the folder icon next to Goal 3 and drag it on top of the folder icon next to Goal 1. This will turn  Goal 3 and its objectives to Goal 1 and automatically change what was previously Goal 1 into  Goal 2. Note that when you change the order of a goal the objectives will also automatically move with the goal.
- A message will come up on the screen that asks if you want to make the change. Click **“OK.”**

### Change the order of an objective:

- Click the objective icon next to the objective you would like to change the order and drag it on top of the folder icon next to the objective number you would like it to change to. For example, if you want to change Objective 3 into Objective 1, then click the folder icon next to Objective 3 and drag it on top of the folder icon next to Objective 1. This  will turn Objective 3 to Objective 1 and automatically change what was previously Objective 1  into Objective 2.
- A message will come up on the screen that asks if you want to make the change. Click **“OK.”**
- Use the method stated above to change the order of an appendix.

## DELETE A GOAL

Steps: To delete a goal.

- Select the goal you want to delete.
- Click on the downward arrow next to the **“plan menu”** field, and then select **“Delete goal.”**
- Or, click on the goal you would like to delete and drag it into the trash icon.
- A message will come up on the screen that asks if you are sure you want to delete the goal and its objectives. Note that when you delete a goal, you will automatically delete all of its objectives.
- Click **“OK.”**



## DELETE AN OBJECTIVE

Steps: To delete an objective.

- Select the objective you want to delete.
- Click the downward arrow next to **“plan menu”** field, and then select **“Delete objective.”**
- Or, click the objective you would like to delete and drag it into the trash icon.
- A message will come up on the screen that asks if you are sure you want to delete the objective.
- Click **“OK.”**



## DELETE AN APPENDIX

Steps: To delete an appendix.

- Click the downward arrow next to the **“plan menu”** field and select **“Delete appendix.”**

## SECTION VII: TOOLS AVAILABLE

- Or, click the appendix you would like to delete and drag it into the trash icon.
- A message will come up on the screen that asks if you are sure you want to delete the appendix.
- Click “**OK.**”

### PRINT A PLAN



Steps: To print an online plan.

- Click the downward arrow next to the “**Menu-Click here for choices**” field.
- Select “**Print the open plan.**”

### DELETE A PLAN

Steps: To delete an online plan.

- You are not authorized to delete an online plan.
- Contact the Staff Development Office at extension 3871.

### START A PLAN

Steps: To start a plan.

- Click the downward arrow next to the “**Menu-Click here for choices**” field.
- Select “**Start a plan.**”

You **cannot** start more than one plan at a time.



#### TIP!

### UPLOAD TABLES, CHARTS, AND/OR PICTURES

Steps: To upload your tables, charts, and/or pictures into your online plan. Note that there are two parts in uploading tables, charts, and/or pictures to your online plan. The two parts are:

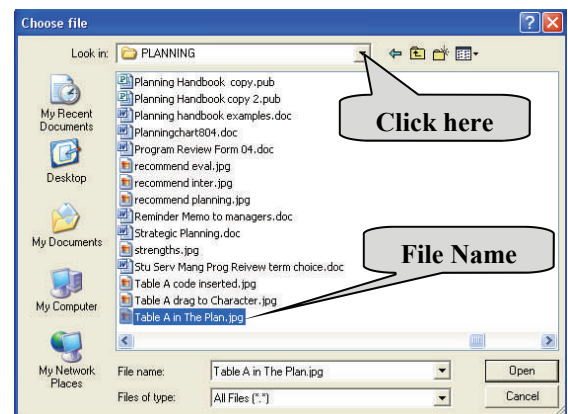
1. uploading the image and
2. inserting the image.



## SECTION VII: TOOLS AVAILABLE

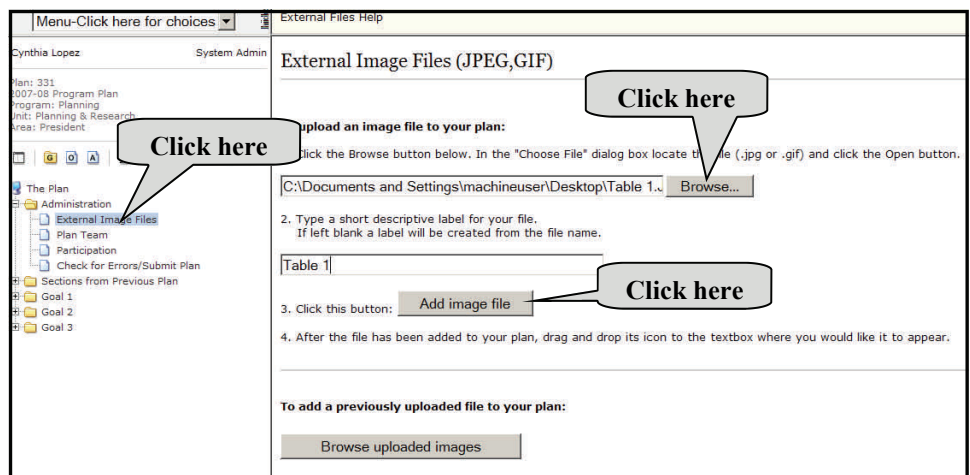
### Part 1 – Uploading the Image (Tables, Charts, and/or Pictures)

- Go to your existing document, highlight and copy your table, chart, and/or picture.
- Go to the Microsoft Paint program (click on the “**Start**” box located in the bottom left-hand corner, click All Programs, then Accessories, and then Paint) and open the Paint program. Note that you may also use Photoshop.
- Click the “**Edit**” field located on your toolbar, click paste.
- Click the “**File**” field located on your toolbar, then click “**Save as,**” click the downward arrow next to the “**Save as type**” field. Scroll down until you locate “**JPEG,**” and then click on it. Name your image and save it on your computer’s hard drive (preferably your desktop so you can locate it) or a disk. Give your file a name that you will remember.
- Go to your online plan.
- Click the “**Administration**” field located on the left side of the screen.
- Click the “**External Image Files**” field.
- Click the “**Browse**” box to locate your file. A “**Choose File**” message will come up, and then do the following:
  - Click the downward arrow next to the “**Look in**” field.
  - Find the drive where you saved your file and search for the name of your file.
  - Once you locate your file, click on the file. The name of your file will come up next to the “**File name**” field.
  - Click the “**Open**” box.
- For Item 2, type a short, descriptive label for your file.
- For Item 3, click the “**Add image file**” box.



### Part 2 — Inserting the Image (Tables, Charts, and/or Pictures)

- Once you have uploaded your table, chart, and/or picture as a JPEG file, the name of your image (table, chart, and/or picture) will appear in the “**External Image**”





## SECTION VII: TOOLS AVAILABLE

**Files”** folder, which is a subfolder under the **“Administration”** folder located on the left side of the screen.

- Click in the section of the online plan (e.g. Characteristics, Performance and Trends, Evaluation of Performance, etc., on the left side of the screen) where you would like to insert your image.
- Click the folder icon (not the text label) next to the image you would like to insert and drag it to the location you want the image to appear. Note that as you drag your image into the section, you must see a circle with a line in the middle.
- When you drop the image into the section, you will see the name of the image in the section (see example below).

You will not be able to immediately view the image you inserted until you click on the **“The Plan”** field. This is the view mode.



**TIP!**

Menu-Click here for choices

Cynthia Lopez System Admin

Plan: 353  
2007-08 Program  
Program: Accreditation  
Unit: Planning & Research  
Area: President

After you insert your image, click here to view the image

Characteristics, Performance, and Trends

Click and drag image into the section

Example of an image inserted into a section

<EF "table 1 (194)" >



STAFF DEVELOPMENT OFFICE  
EL CAMINO COLLEGE  
16007 Crenshaw Blvd.  
Torrance, CA 90506  
Voice: 310-660-3871  
Fax: 310-660-6157