

# Instructions for Campus Labs/Anthology Planning for Enrollment Support Programs

**This document provides basic instructions for using Campus Labs/Anthology Planning and includes how to:**

1. Get help with Planning
2. Log in
3. Navigate to your program(s)
4. Check/Change the time period (optional)
5. Select the Enrollment Support Assessment Plan template
6. Create a new item
  - Important labeling conventions
7. Link/Relate items to a project description
8. Edit existing items
9. Sort and filter information
10. Export or share your assessment plan

## 1. Get Help with Planning

New and experienced Planning users sometimes run into an occasional question that the instructions below don't answer. If that happens, help is available from the following sources:

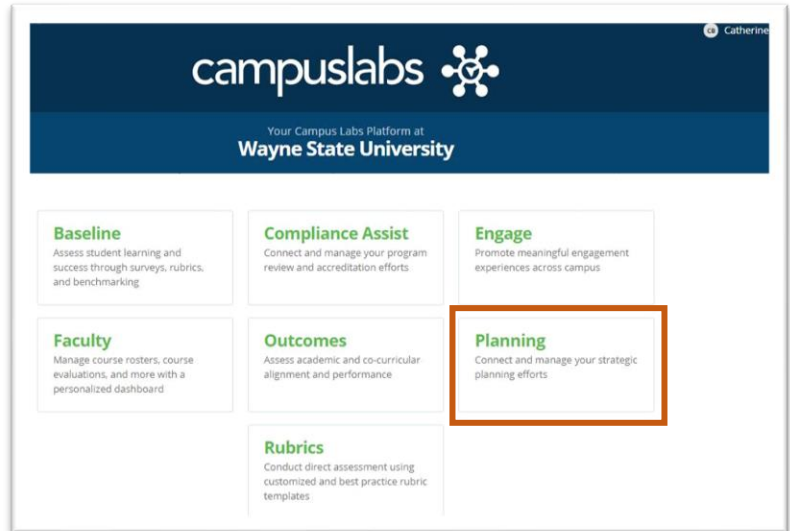
1. Cathy Barrette, WSU Director of Assessment ([c.barrette@wayne.edu](mailto:c.barrette@wayne.edu))
2. [Campus Labs Support](#), which offers individual help by:
  - a. Chat (9am to 5pm EST weekdays)
  - b. Phone (8am to 8pm EST weekdays) at (716)270-0000
  - c. [Web form](#)
  - d. Email ([support@campuslabs.com](mailto:support@campuslabs.com))
3. Campus Labs End User Online Training [Modules](#)



CAMPUS LABS PLANNING  
SUPPORT SITE LOGO

## 2. Log In

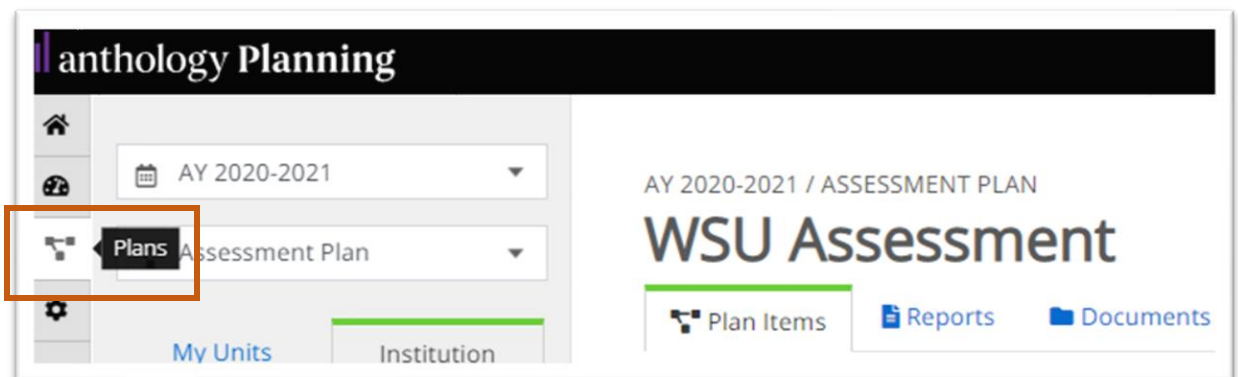
1. To get permissions in Planning to access a program's assessment plan, please send the individual's full name, AccessID, and desired access level (read/edit or read only) to [c.barrette@wayne.edu](mailto:c.barrette@wayne.edu).
2. Go to [wayne.campuslabs.com](http://wayne.campuslabs.com)
3. Use your WSU credentials to sign in (AccessID, password)
4. Select **PLANNING**.



## 3. Navigate to Your Program(s)

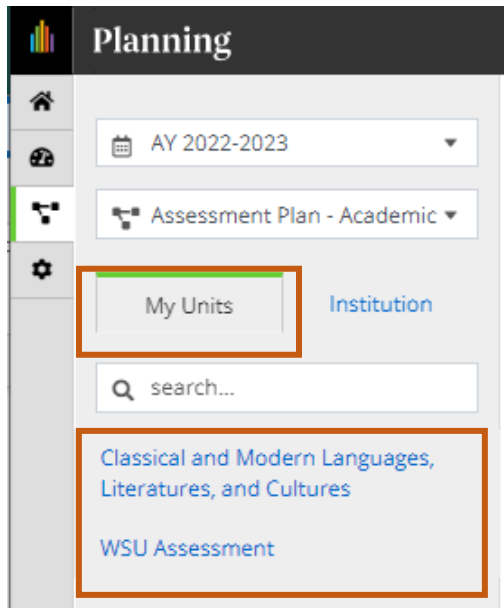
The default home view only provides a filtered list of information, so is often not the best view. To see all your information:

1. Click on the **PLANS** icon (the three dots with connecting lines).



PLANS icon on left navigation bar

2. In the **MY UNITS** tab, click the program in the program list that you want to work on. (You can also browse for your program under the INSTITUTION tab or find it using the search bar.)

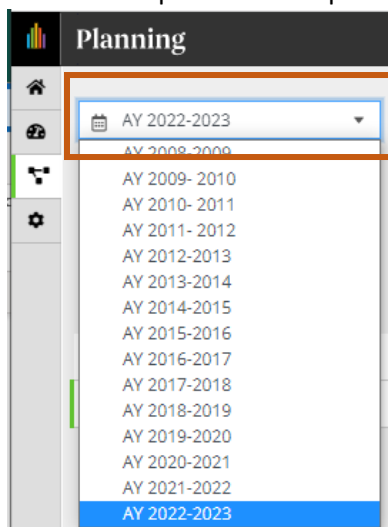


MY UNITS tab and Program List locations

#### 4. Check/Change the Time Period

Planning only allows a single time period for all programs, which is the current academic year (September 1 to August 31). **Enrollment Support programs, however, will be reporting on a calendar year cycle. For your purposes, focus on the ending year of each time period as your calendar year indicator.** For example, to work on your 2023 reporting, select “AY2022-2023”.

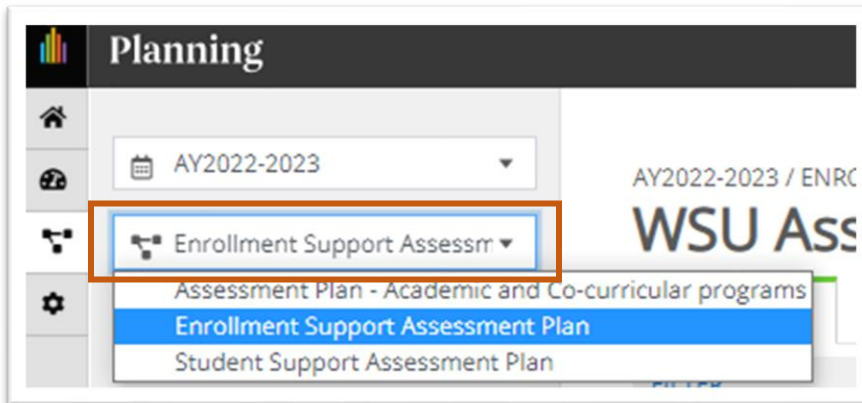
To return to previous time periods, use the pulldown menu at the top left.



Time Period pulldown menu location

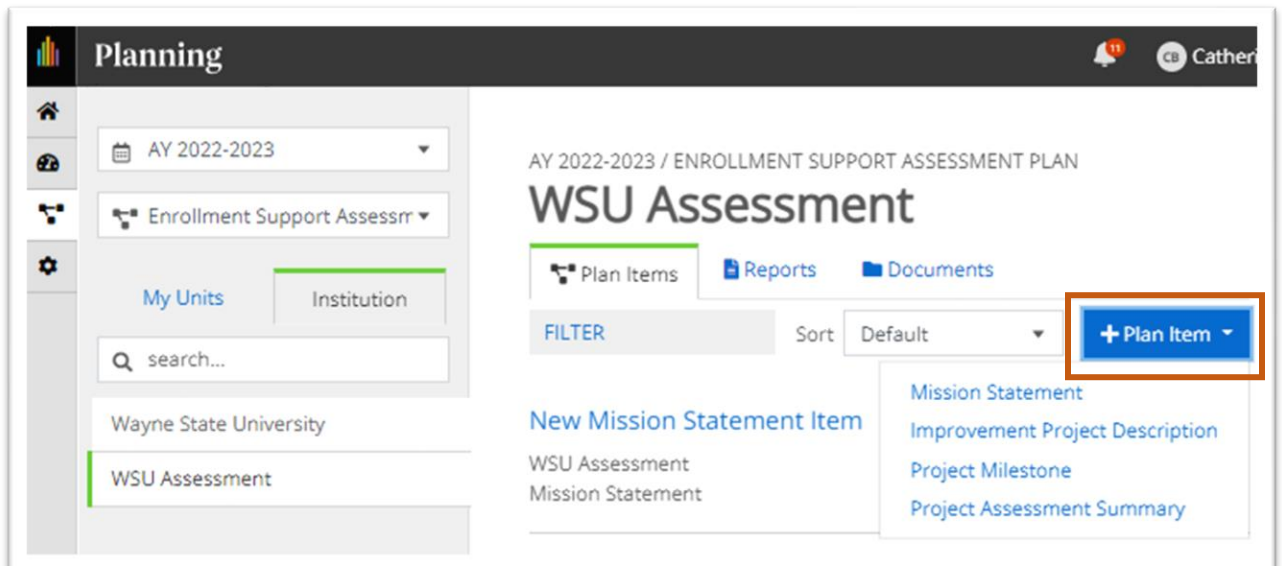
## 5. Select the *Enrollment Support Assessment Plan* Template

Some users have access to multiple assessment plans. Be sure to select the **Enrollment Support Assessment Plan** from the pulldown menu just below the time periods if it is not your default.



## 6. Create a New Item in Your Program's Assessment Plan

1. Click on **+ Plan Item** to open a menu of items you can add (e.g., mission statement, assessment).
2. Select an item from the list to add it. An editing window will open where you can add your content.
  - a. You'll need 1 Mission Statement and at least 2 Improvement Project Descriptions, 2 Project Milestones per project, and 2 Project Assessment Summaries.
  - b. Information is saved automatically as you work, indicated by a green circle with a check mark in it.



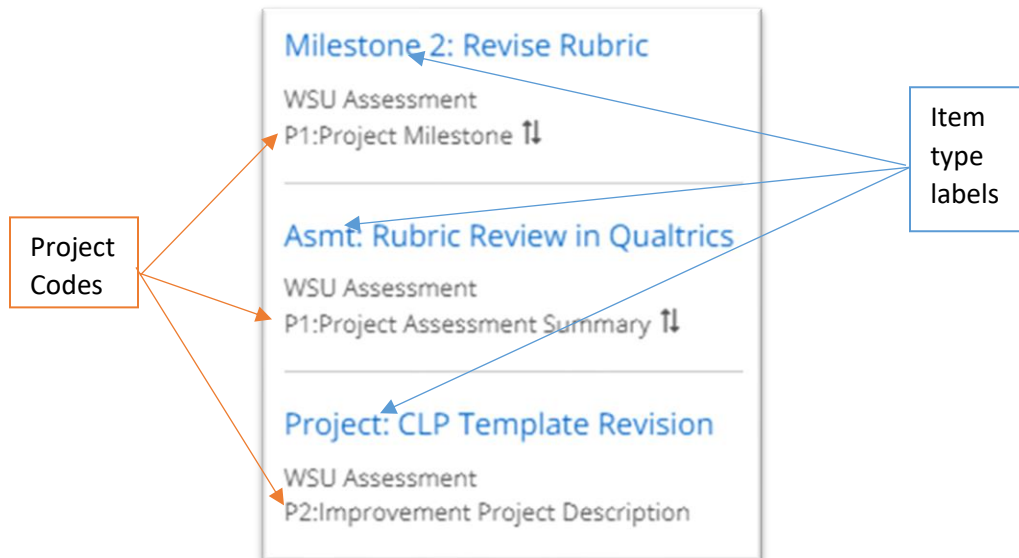
3. If there is a default title (e.g., “New Mission Statement”) in your new item, replace it with a short keyword title before completing any other sections.

**IMPORTANT LABELING CONVENTIONS:**

How you label your items affects how easily you can sort them and identify which type they are in your table of contents and in reports.

To facilitate both:

- a. **Begin each title with a short label for the item type** so that the items will display in a logical order.
  - i. Examples: “**Mission**: WSU Assessment”, “**Project**: Rubric Review in Qualtrics”, “**Asmt**: Rubric Review in Qualtrics”
  - ii. **If you have multiple items of the same type**, add a number if you want to control the order in which they are displayed (e.g., “**Milestone 1**: Rubric Feedback”, “**Milestone 2**: Revise Rubric”).
- b. **Enter a short, unique Project Code (Number Identifier) of your choice when setting up each Improvement Project Description.** The code can be one or more letters, numbers, or symbols, e.g., “P1”.
  - i. Enter that same Project Code in the Project Milestone and Project Assessment Summary items that are related to that project.

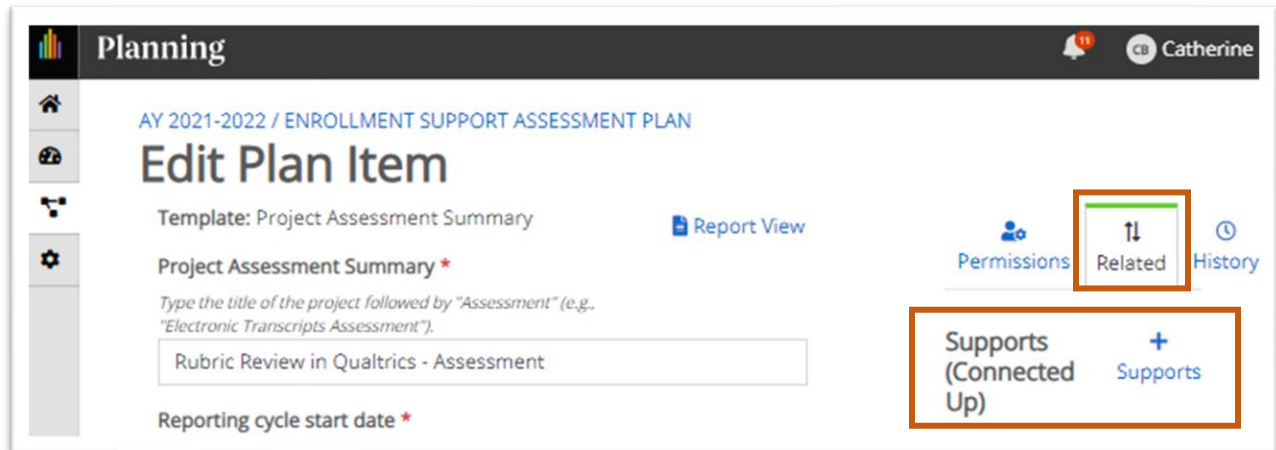


- ii. The **Mission Statement** has a Number Identifier box. Enter “0” (zero) to make your mission the first item in your reports.

## 7. Link/Relate Items to a Project Description

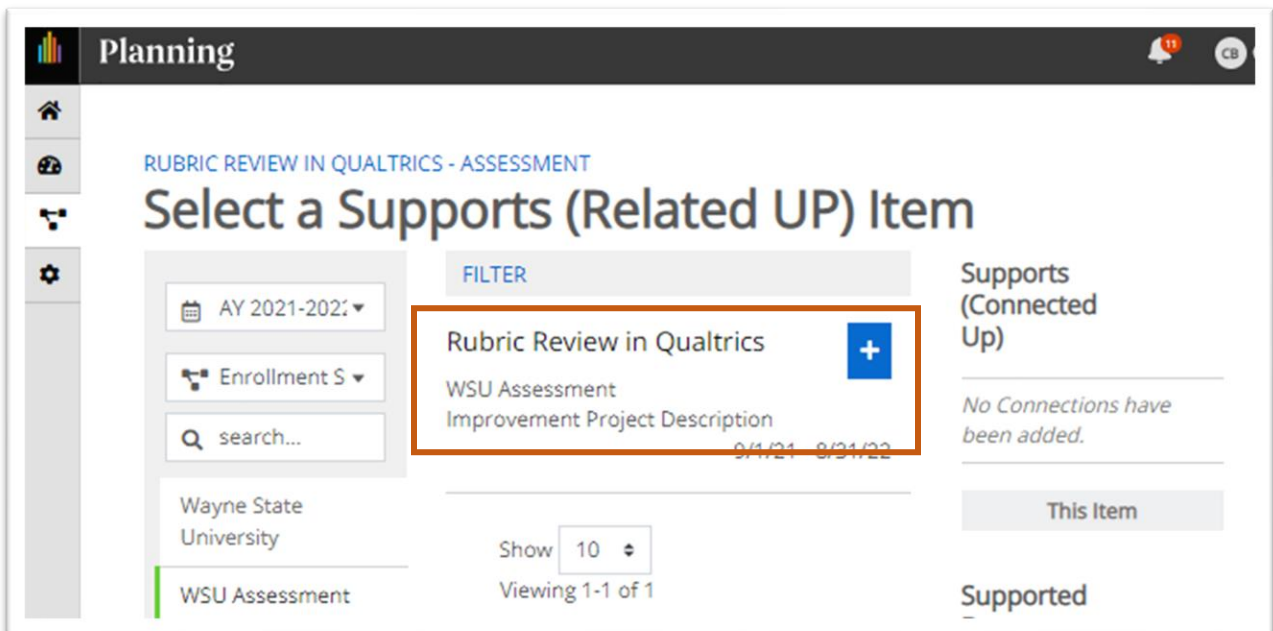
Linking/relating items creates relationships between them. This affects how they display in reports.

1. If your new item is a **Project Milestone** or a **Project Assessment Summary**, go to the **RELATED** tab and click on the **+Supports** link in the “Supports (Connected Up)” section.



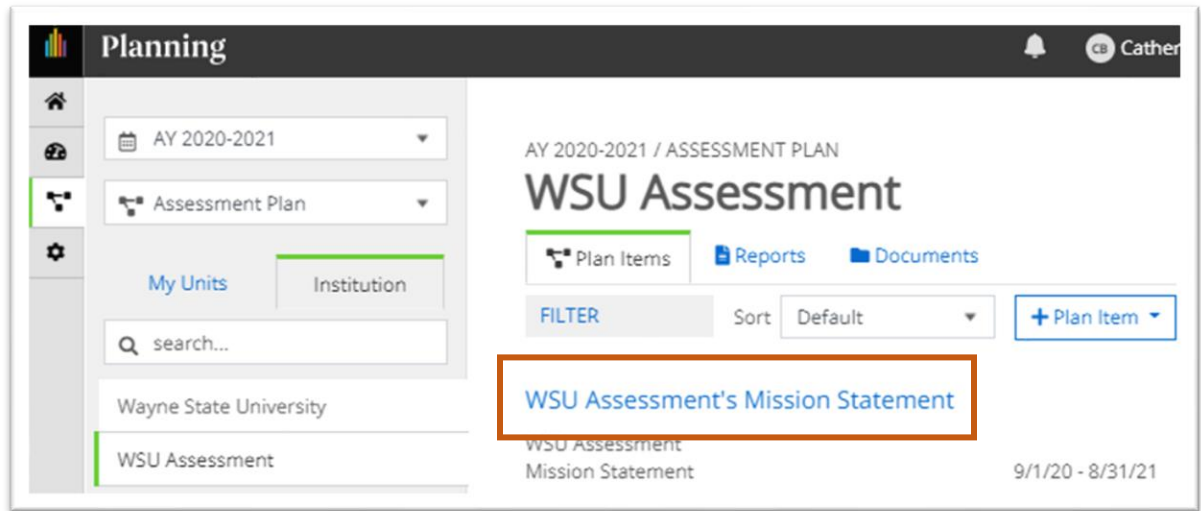
In the new view, select the **+** (plus sign) next to the **Improvement Project Description** that you want to link your milestone or assessment summary to. The **+** (plus sign) will change to a check mark.

NB: If you don't see any items to choose, check the left navigation menu. You may need to select your program name again to get back to the relevant list of items.



## 8. Edit Existing Items in Your Program's Assessment Plan

1. Click on the title of the item you want to edit. An editing window will open where you can modify your content.
  - Keep in mind that the information you want to edit may be embedded in a larger item (e.g., Project Assessment Summary includes an Evidence/Data box and a multiple-choice item for HLC (Accreditation) Alignment).

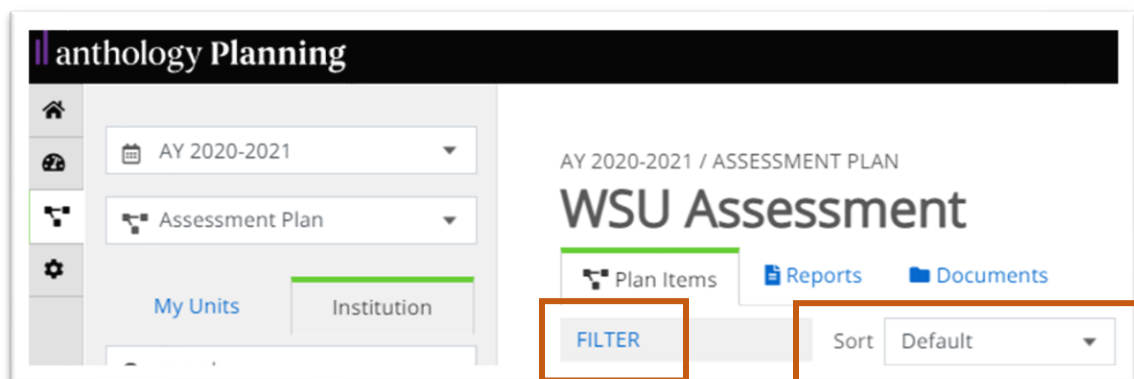


Item title example

2. Once you've made your changes, you can navigate to the next item or program you want to work on. Clicking "Done" is optional; your work auto-saves regularly.

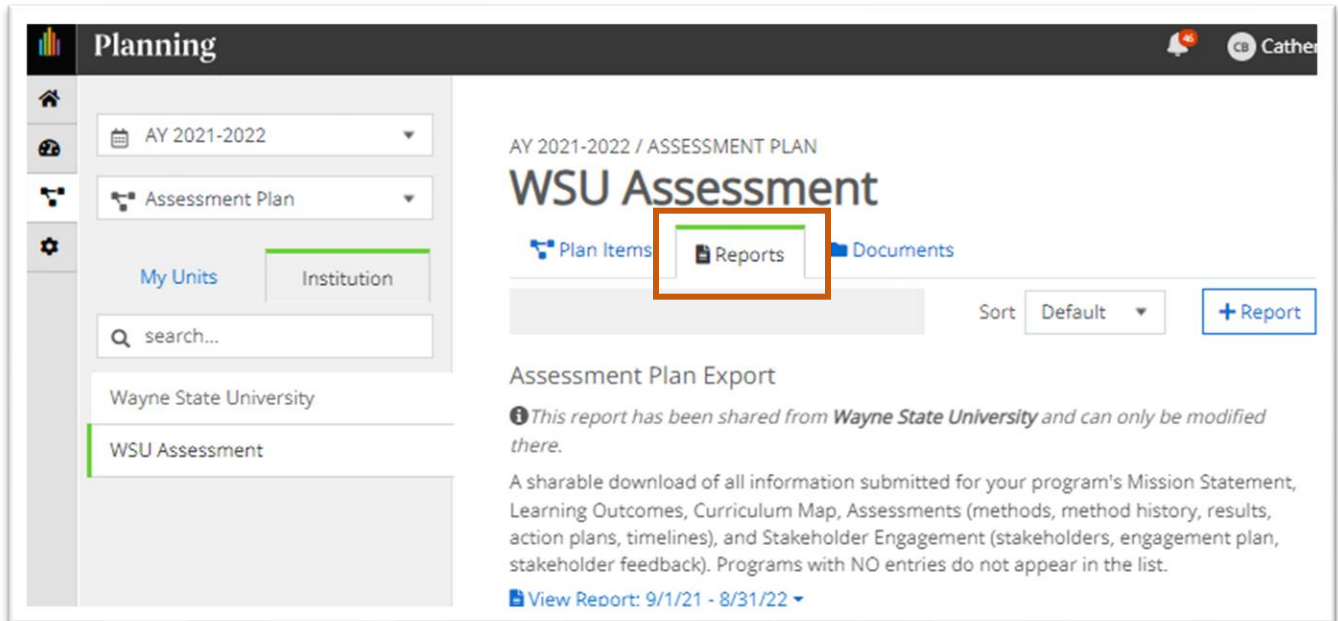
## 9. Sort and Filter Your Program's Information

- To organize your list of items by template (the default), name, or another attribute, use the **Sort** pulldown menu.
  - To sort by project, select Number Identifier. This will sort by the Project Code explained in section 5 above.
- To display only a subset of items, use the **Filter** hyperlink. See the [Campus Labs instructional article](#) for more detail if needed.



## 10. Export or Share Your Assessment Plan

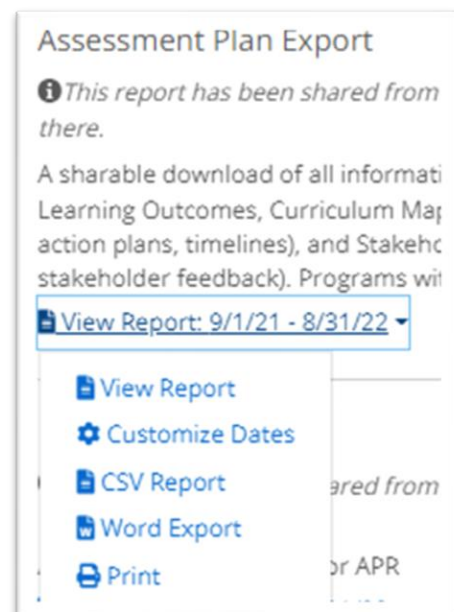
1. In the **PLANS** view, navigate to the program or unit whose plan you want to export.
2. Select the **REPORTS** tab. A list of the reports that you have access to will be displayed. Choose **Assessment Plan Export - Enrollment Support Programs** to export your program's submissions for a given year.



Reports tab location

3. Click on **View Report** to reveal a pulldown menu with options for viewing, customizing, or exporting the report in CSV or MS Word formats. The **View Report** option in the pulldown menu generates a report for the default time period in the default format (PDF).

NB: Reports will always generate using the default year's data, even if you are viewing a different year's display on your screen. If you want a report from a different year, you must first **Customize Dates** under the View Report menu.





Once you click on **Customize Dates**, then click on and edit the **Start** and **End** dates. Only change the years (not the month or day) to the desired one-year reporting period:

UNIT REPORT

## Custom Report Date Range

### Assessment Plan Export

A sharable download of all information submitted for your program's Mission Statement, Learning Outcomes, Curriculum Map, Assessments (methods, method history, results, action plans, timelines), and Stakeholder Engagement (stakeholders, engagement plan, stakeholder feedback). Programs with NO entries do not appear in the list.

#### Date Range

Adjust the start and end dates and click, View Report

Start Date: 09/01/2019

End Date: 08/31/2020

Buttons: Cancel, Word Export, CSV Report, View Report

4. Once your changes have been made, click on the **View Report** button to view your report in a new window.
5. If you chose **View Report**, click **Print** to print/save to PDF, or choose to download a CSV or MS Word file. You can also click **Share Item** to email a link to the report to another Planning user.