Instructions for Campus Labs/Anthology **Planning** for Academic, Co-curricular, and Student 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. Select a time period (optional)
5. Select the right template for your program
6. Create a new item in your assessment plan
7. Edit existing items in your assessment plan
8. Move an item to a different year
9. Move an item to a different program
10. Sort and filter information
11. Export or share your assessment plan

For information about what content to add to Planning and the timeline for each year, please see these other resources:

- [What to write (docx)](#) in each section of your assessment plan in Planning.
- The [Academic](#) and [Student Services](#) Assessment Handbooks, with good examples from WSU programs for each part of the assessment plan
- [Annual assessment timeline](#) with Fall, Winter and Spring/Summer deadlines

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)
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)
3. Campus Labs End User Online Training [Modules](#)
4. Also, brief instructions are embedded in Planning under each item:


CAMPUS LABS PLANNING SUPPORT SITE LOGO

2.1 Goal/Outcome Title (Assessment Method Keyword) *

Enter a keyword for this goal/learning outcome. Add a keyword/phrase in parentheses at the end. (e.g., Navigate WSU systems (Advisor observation). Create a separate item for a different goal/outcome or for an additional assessment method for the same goal/outcome.

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.
2. Go to **wayne.campuslabs.com**
3. Use your WSU credentials to sign in (AccessID, password)
4. Select **PLANNING.**
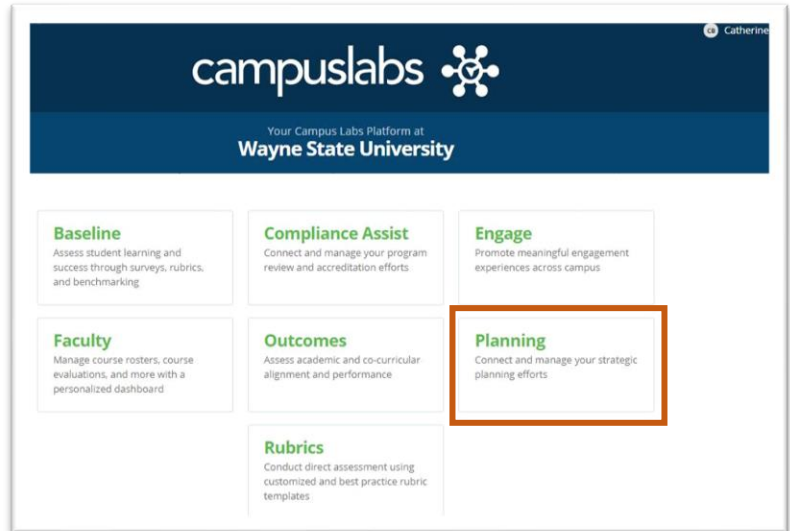
3. Navigate to Your Program(s)

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).
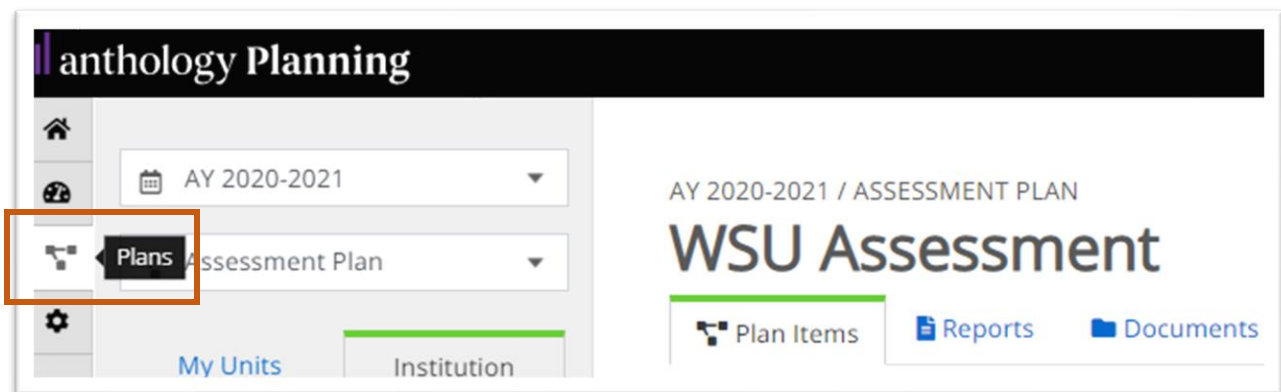

PLANS icon on left navigation bar

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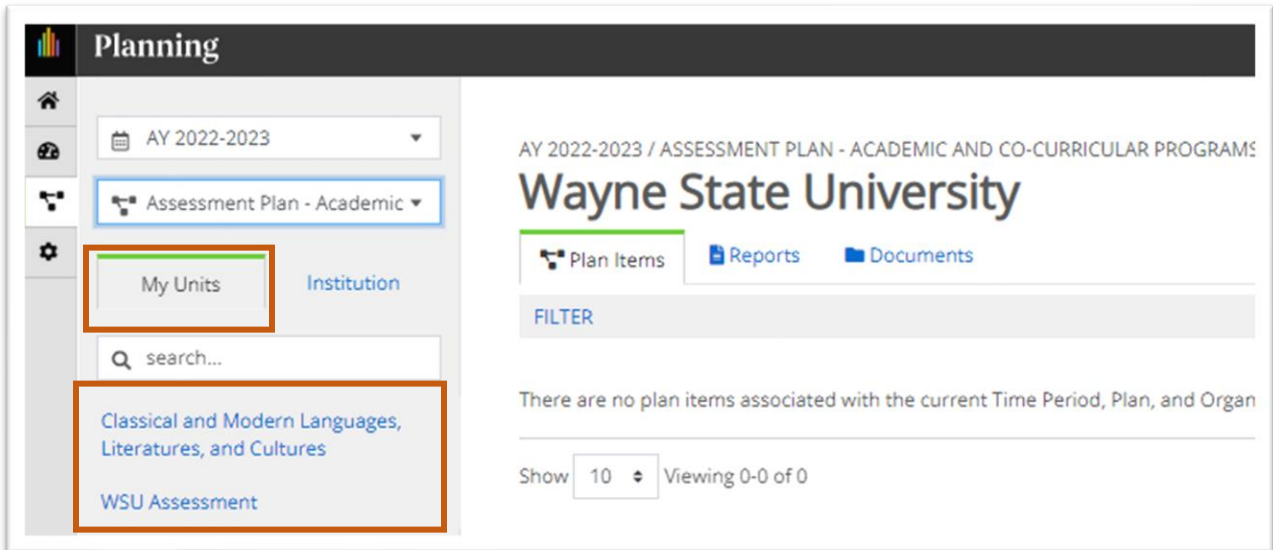
MY UNITS tab and Program List locations

4. Optional: Select a Time Period

The default time period is the current academic year. To see previous years, use the pulldown menu at the top left of the Planning window.
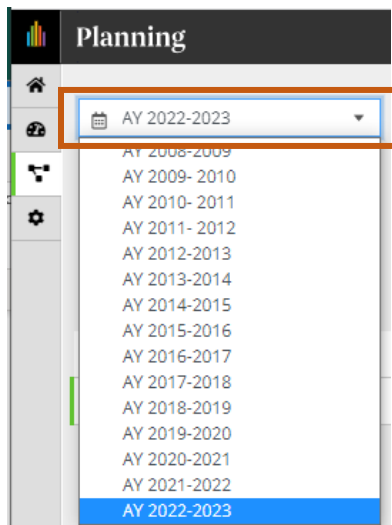

Time Period pulldown menu location

5. Select the Right Template for Your Program

Some users have access to multiple assessment plans, so may need to choose the right one before entering any information.

1. In the Plans pulldown menu on the left, select your group's plan: **Assessment Plan – Academic and Co-curricular Programs** or **Assessment Plan – Student Support Programs.**
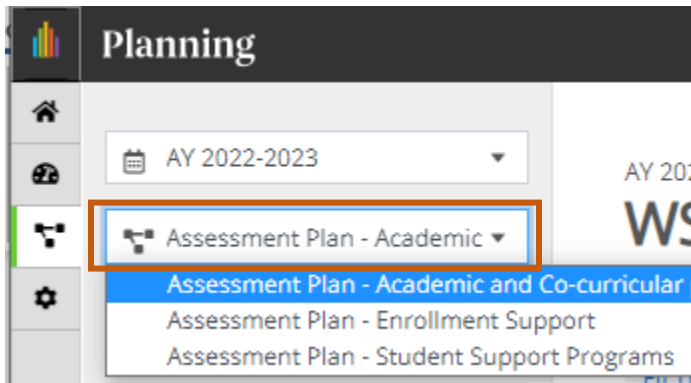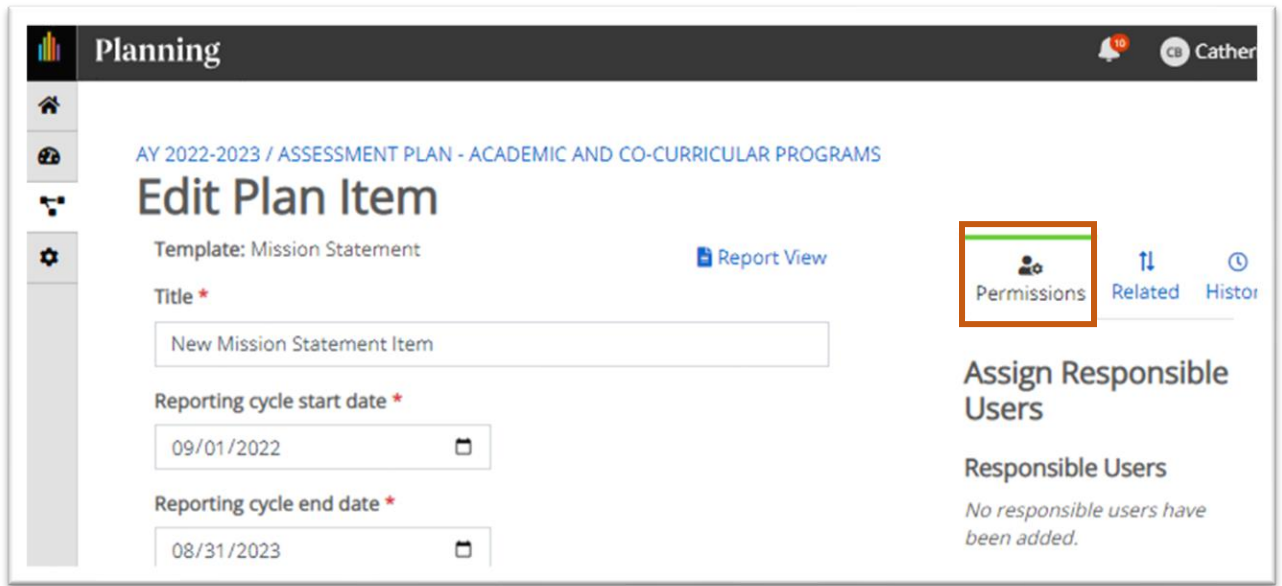

6. Create a New Item in Your Program's Assessment Plan

1. Click on **+ Plan Item** to open a menu of items you can add (e.g., mission statement, learning outcomes, goals).
2. Select an item to add it. An editing window will open where you can add your content.
   a. Information is saved automatically as you work, indicated by a green circle with a check mark in it.
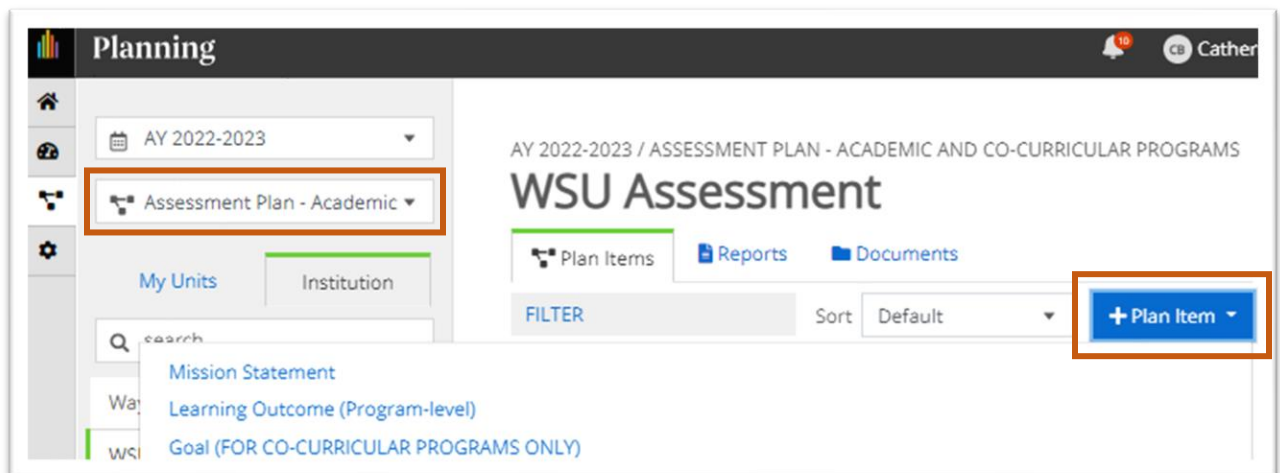

Locations to select your group's assessment plan and the Add a Plan Item menu

3. Optional: You can assign responsibilities for an item to a user under the **PERMISSIONS** tab when creating or editing the item. Doing so will make the item show up on the user's dashboard in a Responsible Items list.

7. Edit Existing Items in Your Program's Assessment Plan

1. Click on the title of the item you want to edit to open an editing window where you can modify your content.
- Keep in mind you may be looking for a section that isn't listed if it's part of an item that includes multiple boxes: e.g., open an assessment for methods, history, results, action plans, and timelines.
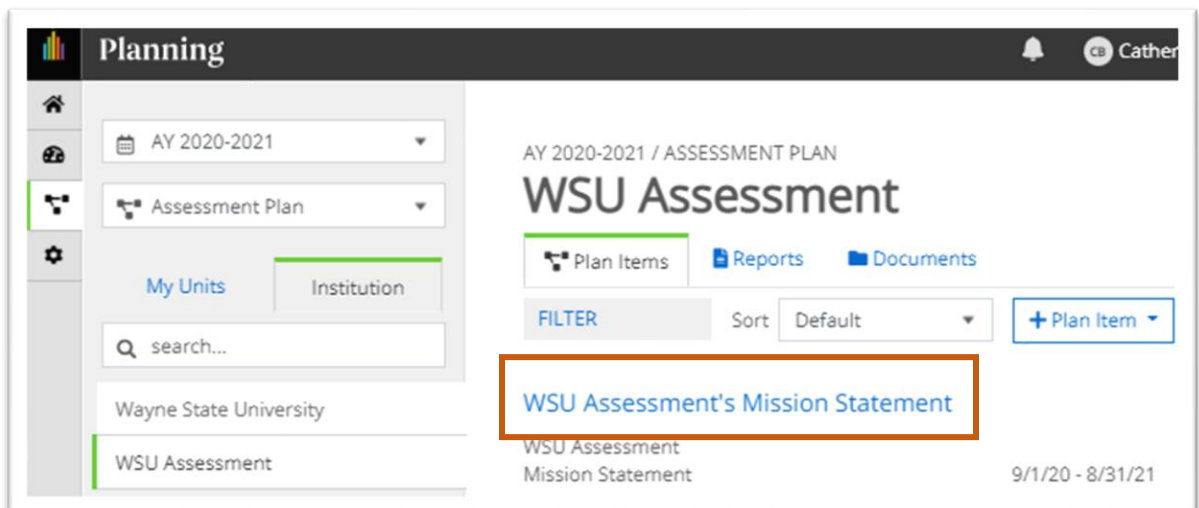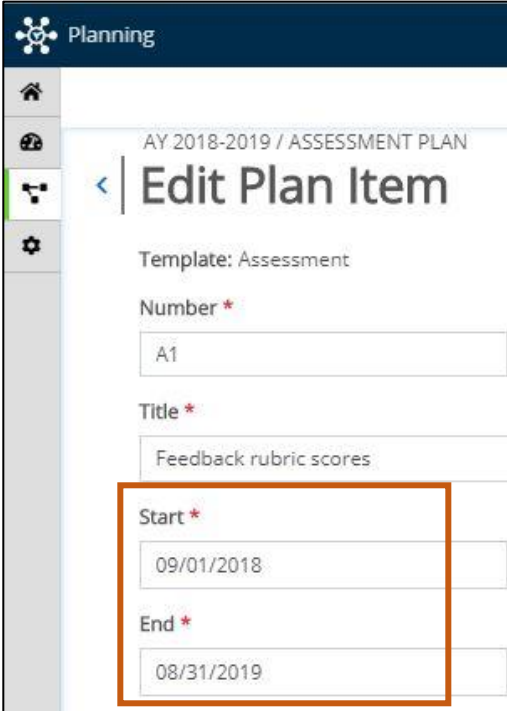

Item title example

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.

8. Move an Item to a Different Year

If you've unintentionally added an item in the wrong year, change the **Start** and **End** dates to move the item to a different year.

Please use academic year dates only (September 1 to August 31).

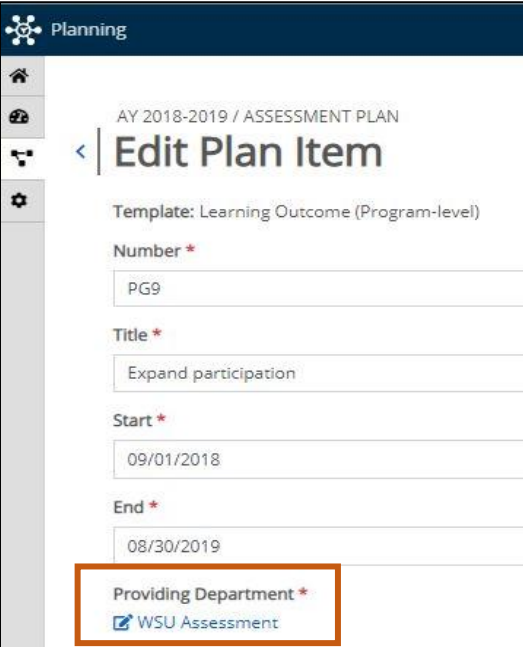NB: If you enter future years, you will not be able to access the item and it will disappear from the current year's view.

Start and End date locations

9. Move an Item to a Different Program

If you've unintentionally added an item under the wrong program and need to move it:

1. Click on the Providing Department's name. A search box will open.
2. Search for the correct department name and select it.
3. Click **Move Item**.

Providing Department location

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

- To organize your list of items by title, number, or another attribute, use the **Sort** pulldown menu.
- To select which information to display by progress or item type (AKA, by "template"), such as learning outcomes, use the **Filter** hyperlink.
- See the Campus Labs instructional article for more detail if needed.
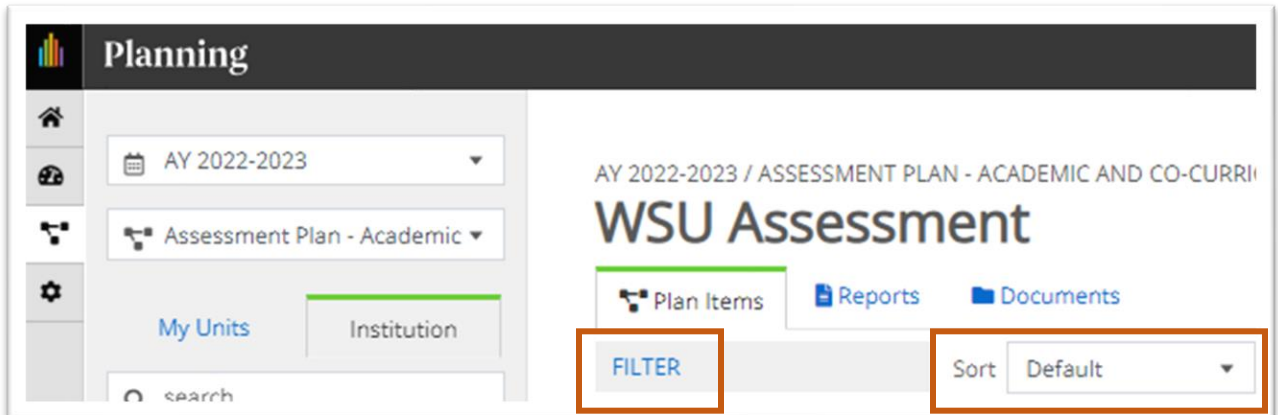
Sort and Filter locations

11. Export or Share Your Assessment Plan

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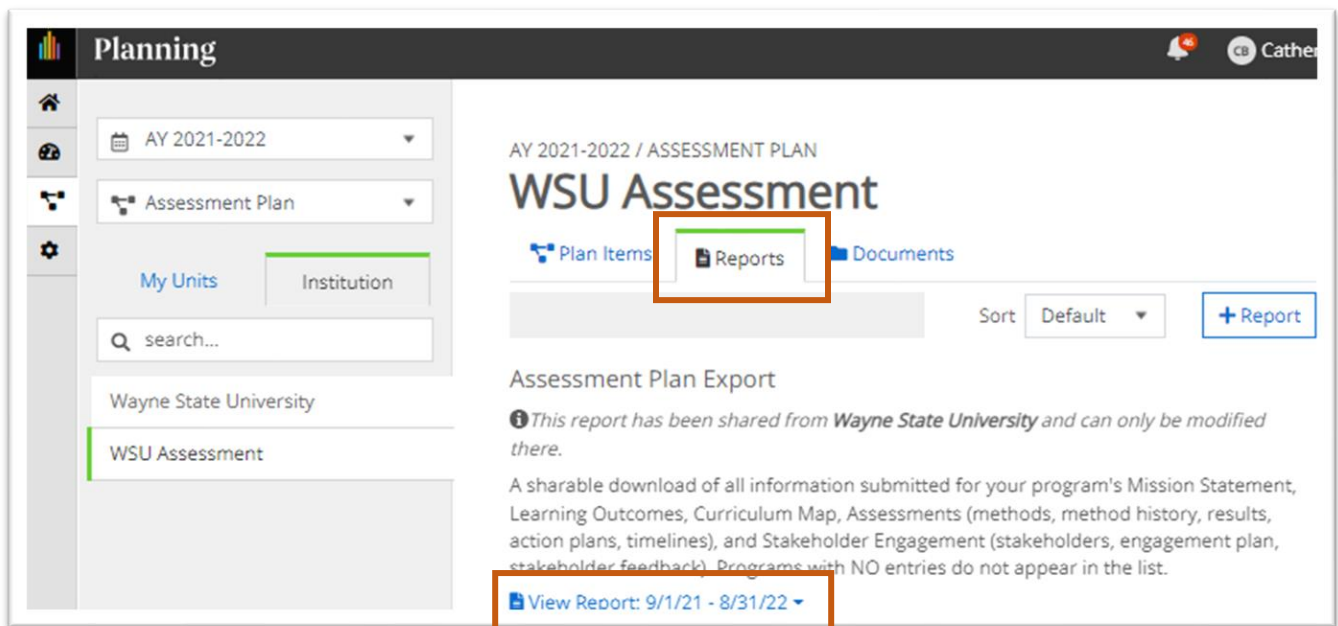

Reports tab location

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 most recent year in the default format, PDF.

> NB: Reports will always generate using the current year's data, even if you are viewing a previous year's display on your screen. If you want a report from a prior year, you must first **Customize Dates** under the View Report menu.
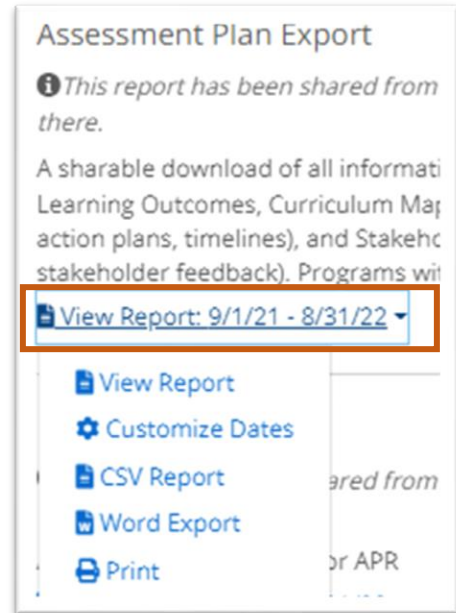
Once you click on **Customize Dates**, then click on and edit the **Start** and **End** dates. Only change the <u>years</u> (not the month or day) to the desired one-year reporting period:
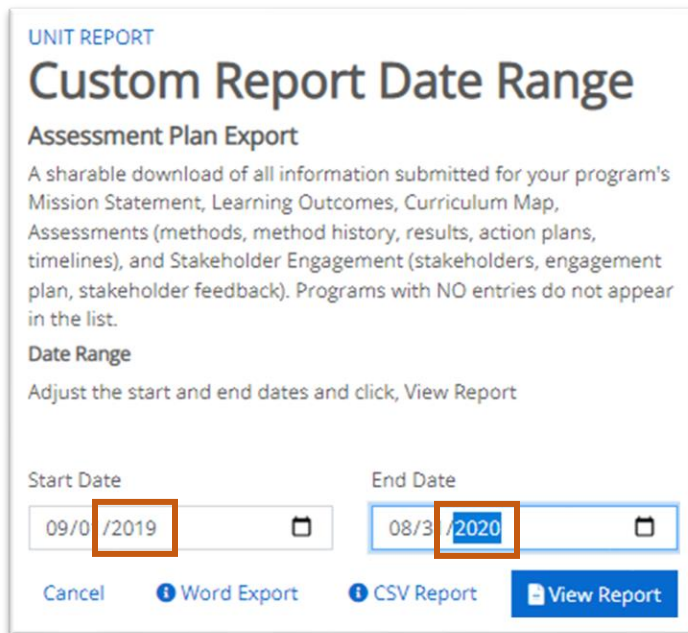
4. Once your changes have been made, click on the **View Report** button to view your report in a new window.
5. If you chose **View Report**, click **Print** to print/save to PDF, or choose to download a CSV or MS Word file. You can also click **Share Item** to email a link to the report to another Planning user.