South Dakota State University
Assessment Academy
Getting Started: Planning; Annual Assessment Report Template

Getting Started

1. Use the Google Chrome web browser
2. Go to https://sdstate.campuslabs.com/home
   a. Login to Campus Labs using your sdstate username and password
3. On homepage, choose ‘Planning’
4. You will be taken to a Dashboard page.
   a. Dashboard contains
      i. Items you are working on
      ii. Items you are Responsible for
      iii. Items you are a Contributor on.
5. Right side of the screen on Dashboard page:
   a. Announcements
   b. Plans you have access to
6. Left side of the screen:
   a. ‘Home’ icon takes you to Dashboard page
   b. ‘Plans’ tab,
      i. Plan Items and Reports live.

Filling Out a Plan

7. Select correct Academic Year on top left side of screen (non-current years will be locked)
8. Select Plan you wish to fill out.
9. In this case, ‘2. SDSU Annual Assessment Report’
10. Go to ‘My Units’
    a. Select desired program/unit
11. Click ‘Plan Items’ tab on the main screen

12. Click ‘+Plan Item’
    a. Click ‘Program/Unit Name’ Plan Item
       i. Enter information into template boxes
       ii. Add available users if applicable
       iii. Select ‘Visibility’ for template (most will be at the ‘Org Level Permissions’)
       iv. Click ‘Done’ at bottom of page
    b. Click ‘Assessment Activities’ Plan Item
       i. Enter information into template boxes
       ii. Add available users if applicable
       iii. Tip: ‘Name’ can be as simple as “Assessment Activities 20__” or more specific if you prefer that

Resource Link: https://planningsupport.zendesk.com/hc/en-us
iv. Click ‘Done’ at bottom of page
c. Click ‘Assessment Results’ Plan Item
   i. Fill out the template
   ii. Add any applicable Outcomes data
      
      1. Click [Outcome]
         a. This will take you to an Outcomes looking page.
      2. Select correct year
      3. Click ‘Programs’ in OrgChart
         
         4. Find desired program (programs are listed in alphabetical order)
      5. Add relevant SLOs by clicking [+] 
         6. Click [Back to Plan Item] to return to Planning template
   iii. Finish filling out template
   iv. Click ‘Done’ at bottom of page

13. Click ‘+Plan Item’
   a. Click ‘Continuous Improvement’ Plan Item
      i. Fill out the template
      ii. Click ‘Done’ at bottom of page

14. Click ‘+Plan Item’
   a. Optional ‘Appendix’ template:
      i. Use fields to add or explain anything not addressed in other Plan Items
      ii. Tip: Rename an ‘Appendix’ item to fit your needs
      iii. Tip: With more than one ‘Appendix’, number them in desired order for final document (e.g. 1. Extra Information; 2. Additional Thoughts; 3. Appendix)

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Creating a Report

1. Click ‘Reports’ tab
2. Click ‘+Report’ for a new report
3. Name report (e.g. Civil Engineering Undergraduate Assessment Report AY:2018/19)
   a. Provide a brief description of the plan (e.g. Assessment Report for Civil Engineering (BS))
4. Primary Data
   a. Click ‘+Template’
      i. A ‘+Choose Template’ dropdown will appear
      ii. You will add each component of the ‘2. SDSU Annual Assessment Report’
      iii. Add Data Fields for each template (Program/Unit Name; Assessment Activities, etc) by clicking the blue plus sign [+]
         1. Example: Assessment Activities
            a. After selecting the Assessment Activities template, a list of data fields will appear
            b. To add each field to the report, click the plus sign for each field (e.g. Department/office; Assessment Coordinator, etc).
         2. Add all fields you want to show in your Report
5. Choose to show Related Data or not

Resource Link: https://planningsupport.zendesk.com/hc/en-us
a. Most common: click ‘Do Not Include Related Data’

6. Choose how to display results
   a. Click ‘Hide fields that do not have any data’

7. Choose start and end date restrictions
   a. Click ‘Restrict results to specific dates’
      i. Enter dates for current academic year
      ii. If you select ‘All time periods’ duplicates will show up in report with more than one year’s worth of data

8. Ignore ‘Sort Results’

9. Choose groupings
   a. Most common: ‘Templates’
   b. Unless you have information in sub-units or programs below you in the OrgChart, in which case, select ‘Org. Units’

10. Click ‘View Report’

11. Review report
   a. Make adjustments as necessary

12. Additional options: get a CSV Report, Word document, print report, or share report with other users

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**Helpful Tips**

1. If you are having difficulty editing a field, ensure you are in the current year

2. Do not alter the “Start” and “End” dates in the Plan Items. The default time frame helps us keep track of when users enter information.

3. Click out of a field box to save the content. A green circle with a check mark will appear indicating that it saved properly.

4. If you are having trouble with “copy and paste” use keyboard shortcuts

5. If you copy and paste information and it pastes in a weird format, highlight text and “Clear Formatting”

6. Anywhere you see an option to ‘add files’ feel free to add any files that would better illustrate your point.

7. When adding templates to Report, generally, only add ‘Responsible Users’, ‘Providing Department’, ‘Progress’, ‘Start’ and ‘End’ to the first template (Mission Statement). These can be left off the rest of the templates unless you have a reason to include them.

8. Likely you will ignore the option to ‘Relate’ items

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