Online Strategic Planning System

This document describes the use of the Strategic Planning online input/contribution system. The system allows for multiple users to view and collaborate on the various parts of a Strategic Plan while maintaining data integrity.

Logging In

Authentication is done through the GVSU Central Login Service. Upon accessing the Strategic Planning link (http://intranet.gvsu.edu/strategicplanning), the system redirect the user to the following login screen for authentication:
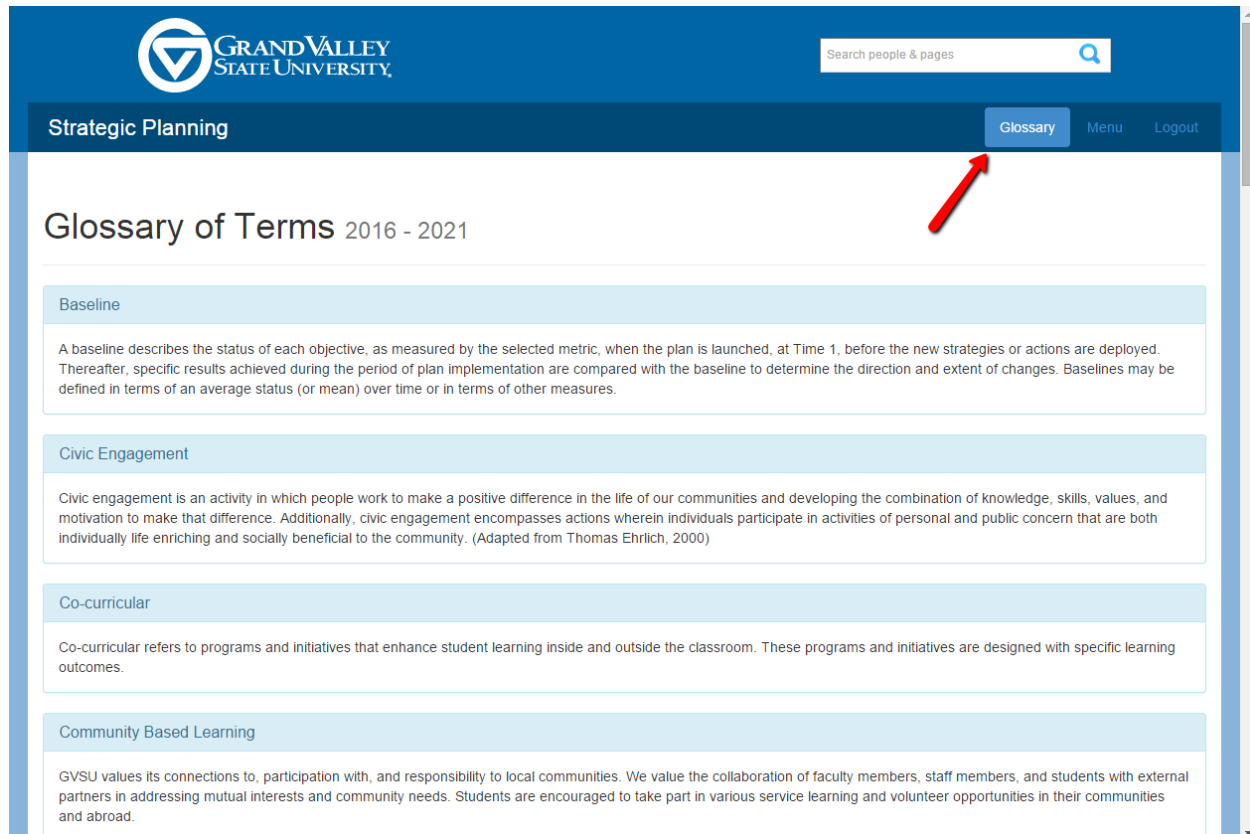

The user's credentials are then determined and the appropriate screens are displayed to them within the online Strategic Planning system. There are four access levels that can be associated with a user account.

1. Admin
    a. An Admin account has access to any aspect of the site. This document will not be used to describe the options available to that user group.
2. Group Admin

      a. Group Admins have control of the Strategic Plan for the entity with which they are associated. They have the ability to "Finalize" the plan when the work has been concluded.

3. Standard

      a. A Standard user has the ability to edit any aspect of the Strategic Plan for the entity with which they are associated. (e.g. A user associated with CLAS can only edit that Strategic Plan)

4. View

      a. This access level allows a user to view any of the plan for the entity with which they are associated.

5. If a user is not defined in the system but has a valid GVSU Faculty/Staff network account, they are allowed to view the finalized sections of the plan for any of the entities (University, Divisions, Colleges, etc.)

Glossary

There is a glossary of terms that is accessible through the Glossary menu item in the upper right corner of the screen. Common terms used in the system and in the plans are defined on this screen.
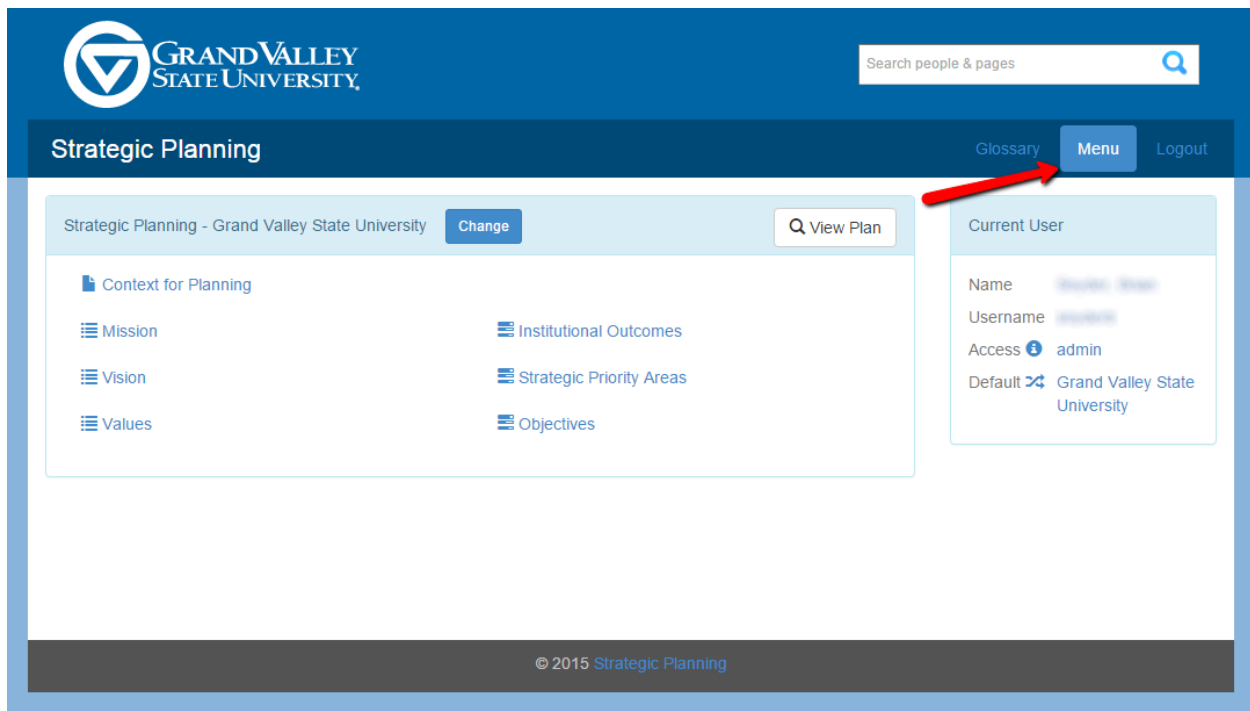
Main Menu

The main menu is used to access the various pieces that compose an entities Strategic Plan. The button to access the menu can be found in the upper right corner of the screen.

Account Info

The Account Info panel displays information about the user that is currently logged into the project. Clicking the information icon next to the "Access" label displays a description about the access level that was granted to the user. The entity that a user has been assigned to is displayed by the "Default" label. If a user has navigated away from their "Default" entity, clicking the "Change to Default" icon will return them to their "Default" entity.
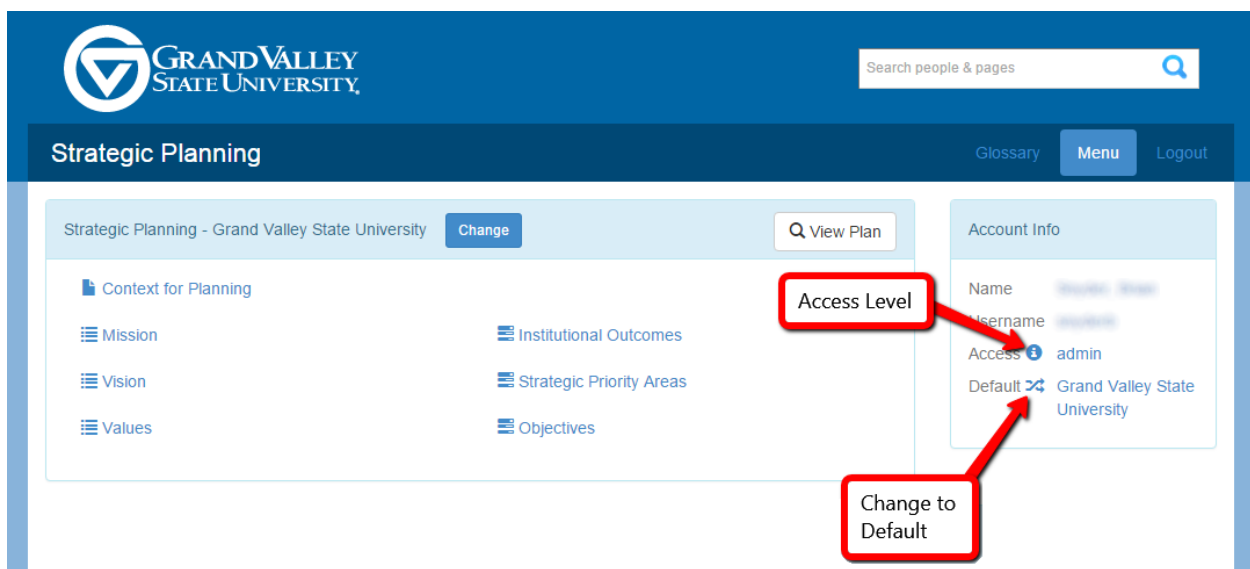
This screen also indicates which entity you are currently working with/viewing. And has a button to change that entity in the sub-header.
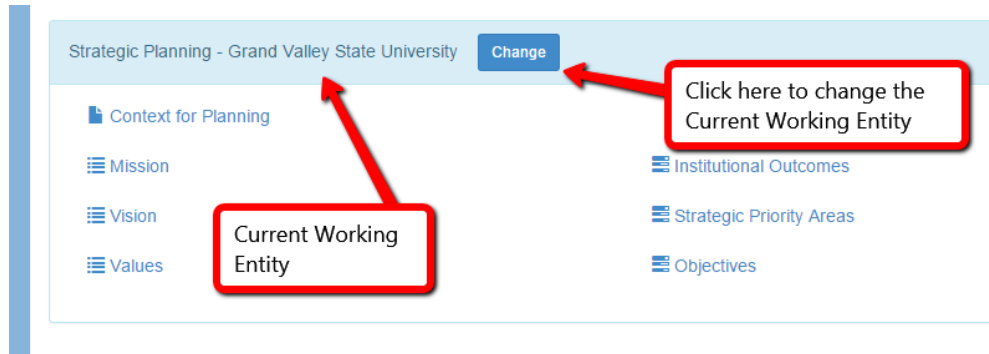
## Changing the Current Working Entity/Searching for a Strategic Plan

Clicking the "Change" button described above will present you with a series of screens that allow you to drill into the various entities that make up Grand Valley State University. Users can also utilize the search function located in the top right corner in the image below to find a specific strategic plan.
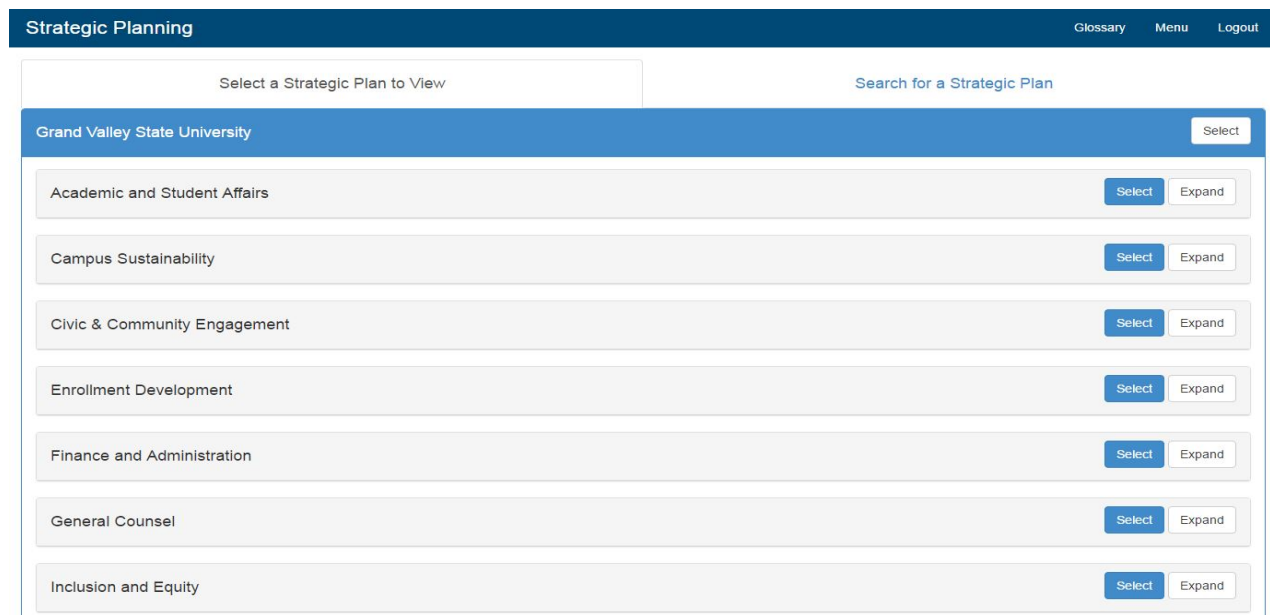

There are two buttons accompanying each of the entities. The "Select" button sets that entity as your "Current Working Entity" while the "Expand" button displays all of the entities that are under the associated entity. E.g. All of the entities displayed in the screen shot above are directly associated with the Institution (GVSU).

Working with a Strategic Plan

This section of the manual describes the screens used to create/maintain a Strategic Plan. Certain maintenance/edit screens of the plan function similarly and will be described jointly.

Editing the Context for Planning, Mission, Vision, and Values sections

The Context for Planning, Mission, Vision, and Values sections function in a similar fashion and will be described as one unit. The instructions described in context of the Vision section are applicable to each of the other sections. Upon accessing a section, a user with rights to edit the plan will be presented with the following screen. Please note that only Group Admins will be presented with the "Finalize" button.
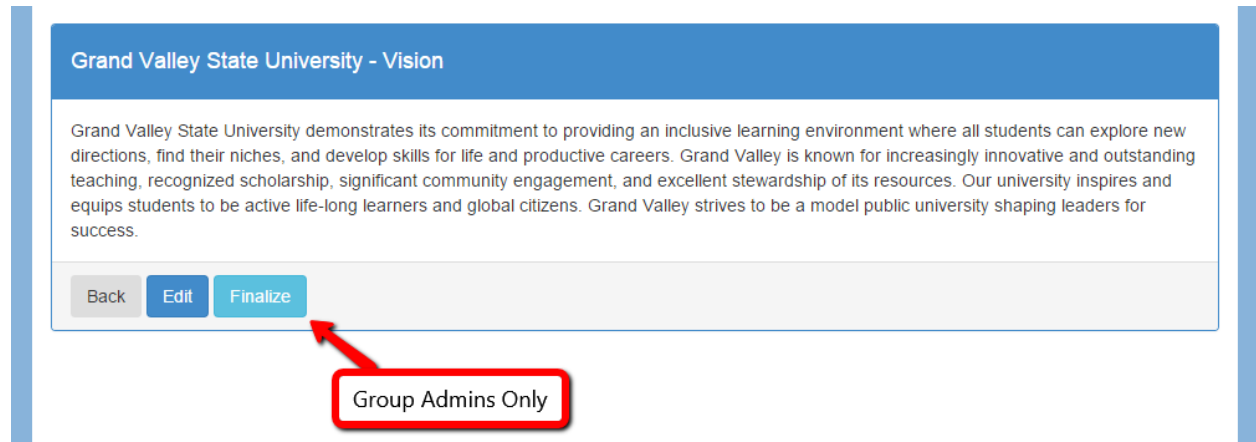
The "Back" button will return the user to the previous screen while clicking the "Edit" button will present the user with the following screen for manipulating the data.

The anatomy of the edit screen includes a simple editor for adding formatting to the text, the option for a user to "Lock" the data for editing purposes and a dialog for adding notes.

Editing the Outcomes and Strategic Priority Areas

The Outcomes and Strategic Priority Areas function is a similar fashion and will be described jointly. The Strategic Priority Area display screen offers options to "Add Strategic Priority Area", "Edit" an existing Strategic Priority Area or "Finalize" a Strategic Priority Area. Note that the "Finalize" button is only available to users with the "Group Admin" access level.
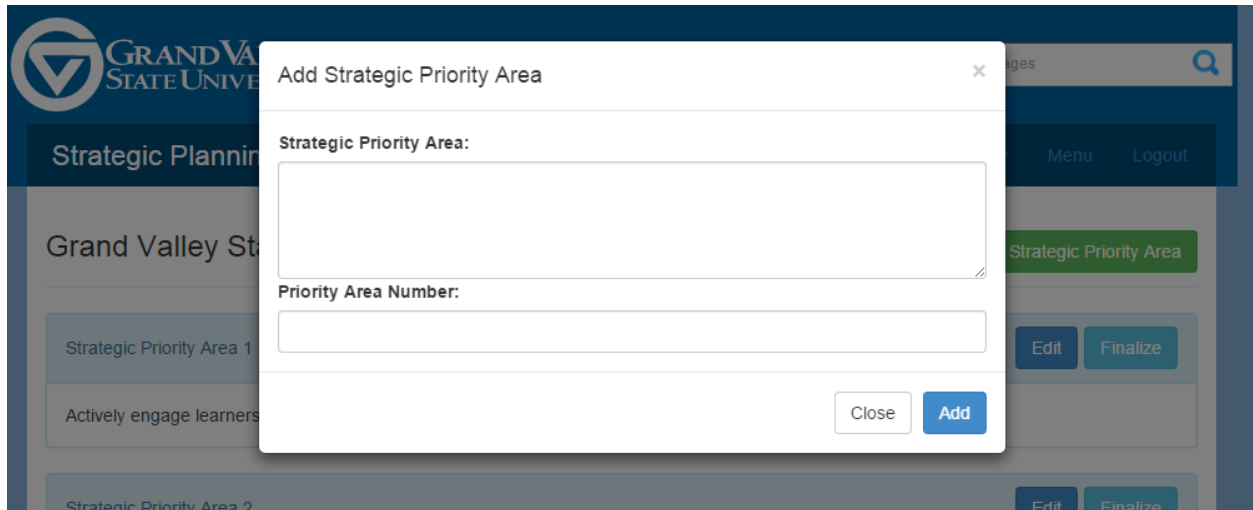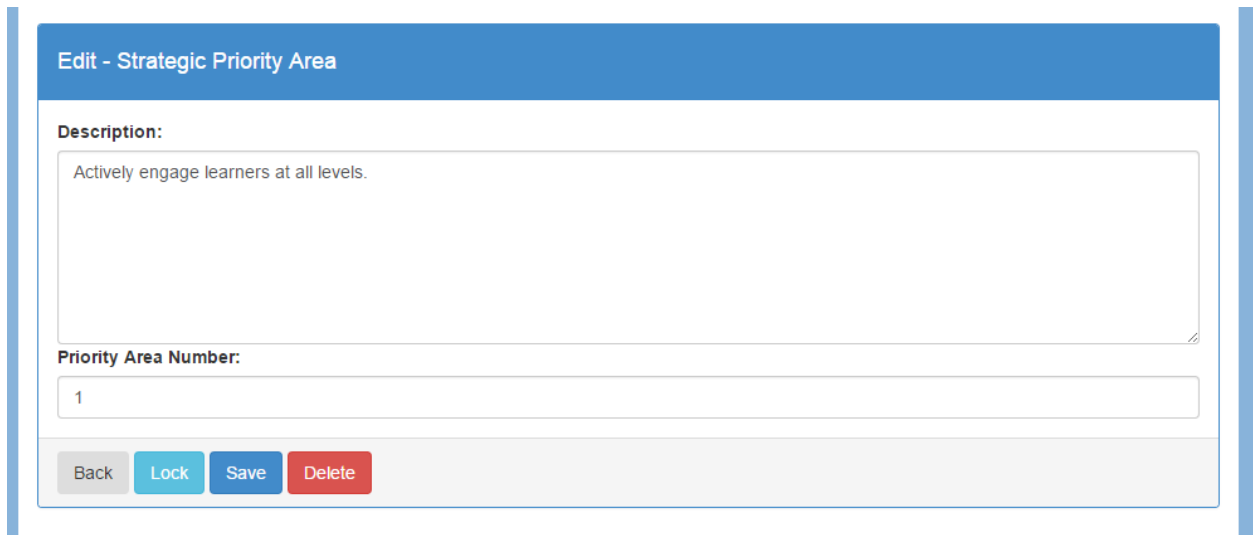
Clicking the "Add Strategic Priority Area" button presents a user with a basic dialog box for creating a new record.

Editing a Strategic Priority Area offers the user the options of locking the record for editing, saving any changes or deleting the record.

Adding/Editing Objectives

Objectives are displayed in a grid layout with associated Outcomes listed across the top of the grid and Strategic Priority Areas listed in the left column. Each Objective has an Edit button and after the last Objective listed in a grid section there is a button for adding a new Objective.

The Objective edit screen lists the Strategic Priority Area, Outcome and if applicable the Institutional Objective that an Objective is associated with at the top of the page. After that information, there are editable fields that make up an objective. There are buttons at the bottom of the screen that allow the user to "Lock" an Objective for editing, "Save" the changes, "Delete" an Objective and "Finalize" an Objective once it's complete. Please note that the "Finalize" button is only available to users with the "Group Admin" access level.

After an objective has been "Finalized", the fields displayed above become locked and an "Add Reporting" button becomes visible. Clicking the "Add Reporting" button brings up the following dialog that allows a user to submit the current state of progress towards obtaining the selected Objective.

Strategic Planning   Glossary   Menu   Logout

Objective Reporting

Objective 1.B.2: Retention rates between freshman and sophomore years and sophomore and junior years for first-generation and other non-traditional undergraduate students meet or exceed the retention rates of traditional undergraduate students.

Year to Attribute this Finding: (publicly reported)

[- ▼]

Status: (publicly reported) ⓘ

[- ▼]

Brief Progress Update: (publicly reported) ⓘ

[ ]

Findings Since Last Reporting: (or upload a PDF - not publicly reported) ⓘ

[ ]

Findings File Title & PDF Upload: (not publicly reported - PDF only) ⓘ

[ ]

[Choose File] No file chosen

Analysis of Findings: (not publicly reported) ⓘ

[ ]

Next Course of Action: (not publicly reported) ⓘ

[ ]

Sharing of Findings: (not publicly reported) ⓘ

[ ]

Additional Comments: (optional - not publicly reported) ⓘ

[ ]

[Back] [Lock] [Save] [Delete] [Finalize]

Please note that you can save work while completing the reporting for each objective ("Save" button at the bottom of the Objective Reporting page) and come back to work on it later.

The Objective Reporting must be finalized before everything is complete (click "Finalize" button at the bottom of the Objective Reporting page). Once "Finalize" is clicked, you will not be able to to edit the reporting further.

If you have questions about the various fields on the Objective Reporting page, please click the Information button for each field, represented by the lower case "i" circled in blue.

In order to make the plan visible on the Strategic Plan Index website, all items must be individually finalized and then the plan must be published. To publish the plan select "Publish this Plan" button shown above. Note that only finalized items will be visible when the plan is published.

Viewing a Strategic Plan

An entities plan is viewable via the "View Plan" button on the"Menu" page.
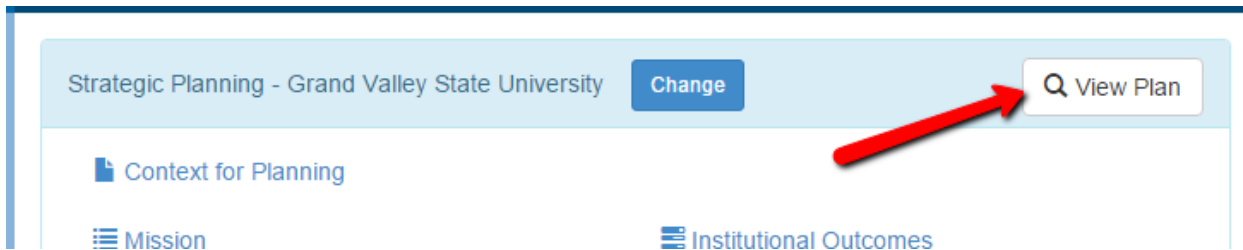
A user can view any entities plan by using the "Change" button. Then after selecting the desired entity, the plan can be viewed by clicking the "View Plan" button.

The Strategic Plan View: