Planning
Results
In
Successful
Management

PRISM USER MANUAL
CS 312 – Software User Documentation Class
Jacksonville State University
Jacksonville, Alabama

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Instructor: Ms. Karen G. Myers

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JSU MCIS Department
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<td>Reviewing Funding Requests</td>
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WHAT IS PRISM AND WHY DO WE USE IT?

PRISM (Planning Results In Successful Management) is an on-line information management system for planning, budget requests, and reporting. It is used by Jacksonville State University (JSU) to facilitate the documentation of the university’s planning and evaluation process.

Division heads determine the information to be entered into PRISM for their unit. This information includes:

- Unit-level goals
- Objectives
- Strategies
- Funding requests
- Methods of assessment/evaluation
- Use of results

Information entered into the system by these university planners will be reviewed by:

- Deans, who can
  1. Approve
  2. Recommend to the Vice-President
  3. Not recommend
  4. Disapprove

- Vice-Presidents, who can
  1. Approve
  2. Recommend to the Expenditures Committee
  3. Recommend to the President
  4. Disapprove

The result of this activity is to provide annual reports with relevant information to decision-makers, to present significant accomplishments, and to show that each unit’s plan is appropriately aligned with JSU’s mission statement.
Section 1 - Entering System and Viewing Data

Section 2 - Planning an Upcoming Year

Section 3 - Evaluating a Previous Year

Section 4 - Administrators: Reviewing/Approving Requests for Funding
1. To change your password, select the **Change your Password** link on the screen.

2. Enter your **UserID** in the text box.

3. Enter your current **Password** in the text box.

4. Create and **Enter New Password** in the text box.

5. **Enter New Password for Verification** in the text box.

6. Select **OK**.
7. Select the **Click Here to Return to Login Screen** link to log in

---

Password Successfully Changed

[Click Here to Return to Login Screen]
UPGRADING YOUR WEB-EDITOR

© FYI: The new web-editor allows Word documents to be copied and pasted without losing any formatting.

1. To view the steps in following this task, select the Web-Editor Upgrade (Click here for Instructions) link on the screen.

Change your Password    Login Screen
Web-Editor Upgrade (Click here for Instructions)

UserID
Password
OK
2. Your result screen should now look like this:

![Screen Shot](image)

3. Simply follow the directions on the screen. If you have any questions about the new Web-Editor, select one or both of the links at the very bottom of the Web-Editor Upgrade page.

Please contact Omer Minhas, Institutional Research and Assessment, at 8157 or by email at ominhas@jsu.edu if you have any questions.
4. Select the \textbf{X} on the Web-Editor Upgrade page to return to the login screen.
1. Enter your **UserID** in the text box

2. Enter your **Password** in the text box

3. Select **OK**
Selecting a Planning Unit

**FYI:** A Planning Unit refers to the Unit or department in which you work

4. To select your Planning Unit, select the arrow on the drop down list box and select your department.
**Selecting a Planning Year**

5. To select a *Planning Year*, select the arrow in the drop down list box.

6. Select which *Planning Year* in which you wish to work.

7. Select **OK**.
After logging in, you will be viewing your **Unit Goals**
**VIEWING INSTITUTIONAL DATA**

**FYI: Institutional Data** includes information on how Jacksonville State University can be contacted, as well as the school’s Mission Statement.

1. To view the **Institutional Data** of Jacksonville State University, select the **Institutional Data** tab on the menu bar.

2. Your result screen should now look like this:

```
Institutional Data
View Record

InstName: Jacksonville State University
InstAbbrev: JSU
InstPres: Dr. William Meadow
InstAddr01: 700 Pelham Rd North
InstAddr02: 
InstCity: Jacksonville
InstState: AL
InstZip: 36261-1602
InstPhone: 2567825781
InstEmail: info@jsu.edu

Institution Mission Statement: Jacksonville State University is a public, comprehensive teaching institution that provides educational, cultural, and social experiences for undergraduate students. As a student-centered university, Jacksonville State University strives to balance academic challenges with students' academic, career, and personal goals. As an academic institution, Jacksonville State University seeks to produce broadly educated, competent, and professional students who are empowered to engage in lifelong learning. As a comprehensive university, Jacksonville State University supports scholarly and academic, and professional strengths.
```
VIEWING INSTITUTIONAL GOALS

1. To view the Institutional Goals, select the Institutional Goals tab on the menu bar.

2. Your result screen should now look like this:

<table>
<thead>
<tr>
<th>Goal Number</th>
<th>Goal Statement</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Educate students to be productive, responsible citizens and effective leaders in a rapidly changing global society.</td>
</tr>
<tr>
<td>2</td>
<td>Promote exemplary teaching and scholarship.</td>
</tr>
<tr>
<td>3</td>
<td>Enhance the roles of research and service.</td>
</tr>
<tr>
<td>4</td>
<td>Develop and maintain a student-body of sufficient size and with appropriate characteristics to constitute a robust learning community.</td>
</tr>
<tr>
<td>5</td>
<td>Increase the use of technology as a comprehensive teaching and learning tool.</td>
</tr>
<tr>
<td>6</td>
<td>Increase the efficiency and effectiveness of administrative processes and services.</td>
</tr>
<tr>
<td>7</td>
<td>Enhance and maintain sound financial planning that assures adequate fiscal resources for the University.</td>
</tr>
</tbody>
</table>
VIEWING ALL UNIT GOALS

FYI: Unit Goals are created by each department and relate (by number and intent) to a particular Institutional Goal set by the university.

1. To view all of the Unit Goals based on the Institutional Goals, select a Goal Number from the Institutional Goals screen.

Institutional Goals 2003 - 2008

<table>
<thead>
<tr>
<th>Goal Number</th>
<th>Goal Statement</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Educate students to be productive, responsible citizens and effective leaders in a rapidly changing global society. Unit Goals</td>
</tr>
<tr>
<td>2</td>
<td>Promote exemplary teaching and scholarship.</td>
</tr>
<tr>
<td>3</td>
<td>Enhance the role of research and service.</td>
</tr>
<tr>
<td>4</td>
<td>Develop and maintain a student-body of sufficient size and with appropriate characteristics to constitute a robust learning community.</td>
</tr>
<tr>
<td>5</td>
<td>Increase the use of technology as a comprehensive teaching and learning tool.</td>
</tr>
<tr>
<td>6</td>
<td>Increase the efficiency and effectiveness of administrative processes and services.</td>
</tr>
<tr>
<td>7</td>
<td>Enhance and maintain sound financial planning that assures adequate fiscal resources for the University.</td>
</tr>
</tbody>
</table>

2. Your result screen should now look like this:

<table>
<thead>
<tr>
<th>Unit Name</th>
<th>Goal Number</th>
<th>Goal Statement</th>
</tr>
</thead>
<tbody>
<tr>
<td>Alumni Affairs</td>
<td>5</td>
<td>Develop and implement programs for young alumni and current students</td>
</tr>
<tr>
<td>Associate Vice President</td>
<td>02</td>
<td>Provide education and guidance to faculty, staff and students on matters of ethics and integrity in research and scholarship</td>
</tr>
<tr>
<td>Academic Affairs</td>
<td>03</td>
<td>Review, improve and sustain academic advising across the institution</td>
</tr>
<tr>
<td>Associate Vice President</td>
<td>04</td>
<td>Develop, monitor and maintain student learning outcomes (educational objectives) consistent with the university’s mission and goals</td>
</tr>
<tr>
<td>Academic Affairs</td>
<td>05</td>
<td>Increase the visibility and impact of sponsored programs’ opportunities for faculty, staff and students</td>
</tr>
<tr>
<td>Associate Vice President</td>
<td>06</td>
<td>Help ensure the acceleration and success of new faculty, including part-time instructors</td>
</tr>
<tr>
<td>Academic Affairs</td>
<td>07</td>
<td>Continue to improve student services</td>
</tr>
<tr>
<td>Career Placement Services</td>
<td>01</td>
<td>Create a professional environment which encourages students’ and recruiters’ participation</td>
</tr>
<tr>
<td>Career Placement Services</td>
<td>02</td>
<td>To assist students and alumni in career placement</td>
</tr>
<tr>
<td>Career Placement Services</td>
<td>03</td>
<td>To provide community employers with top-notch students for internships, co-op opportunities, and career placement</td>
</tr>
<tr>
<td>College of Arts and Sciences</td>
<td>01</td>
<td>To strengthen undergraduate liberal, professional, and artistic studies</td>
</tr>
</tbody>
</table>
Section 1 - Entering System and Viewing Data

Section 2 - Planning an Upcoming Year

Section 3 - Evaluating a Previous Year

Section 4 - Administrators: Reviewing/Approving Requests for Funding
VIEWING UNIT GOALS

1. To view the goals from your Unit, select the **Unit Goals** tab from the menu bar.

Your result screen should now look like this:

![Image of the result screen showing unit goals]

2. Your result screen should now look like this:
FYI: Unit goals are connected to institutional goals. The unit goals should state the action(s) the unit will take to accomplish one or more institutional goals.

Adding a Unit Goal

1. Click on the **Unit Goals** tab

2. Select **click here to add a new goal**
3. Enter the Unit Goal number into the *GoalNumber* text box
   ♦ Use sequential numbers with a leading zero, such as 01, 02, 03, …, 10, ...

4. Enter the Unit Goal into the *GoalStmt* text box
5. Select **OK** to add the new goal.

6. Your result screen should now look like this (shown with some illustrative Unit Goals added):

**FYI:** An “E” Goal is the abbreviated name for an educational goal. The educational goals should reflect what students will be able to think, know, or do because of their educational experiences.
EDITING A UNIT GOAL

1. Click on the **Unit Goals** tab

2. Select the Unit Goal number you would like to edit
EDITING A UNIT GOAL (CONTINUED)

3. Select the **Edit** button from the set of options

4. Enter new information into the text boxes

5. Click **OK** to update the goal
6. Your result screen should now look like this, with your edited goal now updated:
DELETING A UNIT GOAL

1. Click on the Unit Goals tab

2. Select the Unit Goal number you would like to delete
3. Select the **Delete** button from the set of options.

Your result screen should look like this, with your goal deleted from the screen:

4. Your result screen should look like this, with your goal deleted from the screen:
VIEWING UNIT OBJECTIVES

1. Click on the **Unit Goals** tab

2. Select the **detail** link that is associated with the Unit Goal for which you would like to see the objective(s)
VIEWING UNIT OBJECTIVES (CONTINUED)

3. Your result screen should look similar to the one below. The arrows are pointing to the unit objectives for that particular goal.
ADDING OBJECTIVE(S) TO A UNIT GOAL

Planning

1. Click on the *Unit Goals* tab

2. Select the *detail* link that is associated with the Unit Goal for which you would like to add an objective(s)
### ADDING OBJECTIVE(S) TO A UNIT GOAL (CONTINUED)

3. Select **Click here to add a new Objective**

<table>
<thead>
<tr>
<th>Objective(s)</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Goal 07</strong>: Click here to add a new Objective. To provide and administer tests as necessary for assessing the intellectual development of students.</td>
</tr>
</tbody>
</table>

| 02.01 | To continue administration of College Board test (ongoing) |
| 02.02 | To transfer responsibility for registering and testing students to Counseling Services, while continuing to maintain CRASE database and analysis in the Office of Assessment (2001-2002) |
| 02.03 | To develop and implement Internet and telephone registration for CRASE testing (2001-2002). This objective is dependent upon improvements in Computer Services’ network support. |
| 02.04 | To implement WEB-based survey administration (2001-2006) (23,000) |
| 02.05 | To develop and implement means of assessing general-education outcomes not covered by College BASE, e.g., computer literacy, oral communications, and aesthetic appreciation. Accomplishing this goal requires designation of a unit or committee with responsibility for general-education outcomes. These assessments will need to be embedded in coursework in the students’ majors and will require cooperation by academic departments (2001-2003). |
| 02.06 | To continue to coordinate (and administer when necessary) the achievement tests in major fields (e.g., MPAT, PACAT) (ongoing). |

**Supports Institutional Goal(s)**

| Click here to add new Institutional Goal(s). |

---

Planning An Upcoming Year | Page 31
4. Your result screen should now look like this:
5. Enter the objective number into the **Objective Number** text box
   - Objectives should be numbered like 1.1, 1.2, ... where the first number (1) is the goal number and the second number after the decimal (.1) is the objective number

6. Enter text explaining the objective into the **Objective Statement/Expected Educational Outcome** text box
7. Enter text explaining the strategy to meet this objective into the *Strategy / Assessment / Success Criteria* text box.
8. Select the **Update** button to add your objective.
9. Your result screen should now look like this (with a new objective added):

![Image of result screen]

**2005 Office of Assessment 2007 - 2008**

<table>
<thead>
<tr>
<th>Objective(s)</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>02.01</td>
<td>To continue administration of College Exit Test (ongoing)</td>
</tr>
<tr>
<td>02.02</td>
<td>To transfer responsibility for registering and testing students to Counseling Services, while continuing to maintain CRASHE database and analysis in the Office of Assessment (ongoing)</td>
</tr>
<tr>
<td>02.03</td>
<td>To develop and implement internet and telephone registration for CRASHE testing (2001-2003). This objective is dependent upon improvements in Computer Services' network support.</td>
</tr>
<tr>
<td>02.04</td>
<td>To implement WEB based survey administration (2001-2005) (3,000)</td>
</tr>
<tr>
<td>02.05</td>
<td>To continue to coordinate and administer when necessary the achievement tests in major fields (e.g., MEAT, PACAT) (ongoing)</td>
</tr>
</tbody>
</table>

**Supports Institutional Goal(s):**

<table>
<thead>
<tr>
<th>Goal(s)</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Click here to add new Goal(s) supported</td>
<td></td>
</tr>
</tbody>
</table>
Requesting Funding for an Objective

**FYI:** Funding requests will travel through the administrative ranks until they reach someone who will/can fund the request. You will be notified by email to check the status of your request once an administrator has acted upon your request.

1. Click on the *Unit Goals* tab

2. Select the *detail* link that is associated with the Unit goal for which you would like to request funding
3. Click the **update** link for the objective for which you would like to request funding.
4. Select the proper **Status** for your request type from the drop down menu.
5. Put the person(s) responsible for the request in the **Person(s) Responsible** text box

6. Select the appropriate **Budget Request Type** from the drop down menu

FYI: O&M stands for operations and management
7. Enter the dollar amount of the funding request in the *Additional Funding Request* text box
   ♦ Amounts can ONLY be entered as whole numbers; for example: 100, 102, 250

8. Enter the funding request priority number in the *Funding Request Priority* (such as 1, 2, 3, ...)

![Additional Funding Request Text Box](image1)

![Funding Request Priority Text Box](image2)
9. Explain the justification for this request in the text box

10. Select the **Update** button to save this request
11. Your result screen should now look like this:

![Sample Screen](Image)

**Evaluating**

The evaluation of an objective is addressed in Section III of this manual.

**A Word about E-Goals**

An “E” Goal is the abbreviated name for an educational goal. The educational goals should reflect what students will be able to think, know, or do because of their educational experiences. “E” Goals should be numbered as follows: E01, E02, etc. To add “E” Goals and Objectives, follow the steps already outlined in this section.

**FYI:** Because “E” Goals are not budget-driven, no budget dialogue will appear in PRISM when you are adding objectives to “E” Goals.
STORING CHARTS/GRAPHICS ON PRISM SERVER

1. Click on the **Unit Goals** tab

2. Select the *detail* link that is associated with the unit goal for which you would like to see the objective(s)
3. Click **update** for the objective for which you would like to add a graphic or chart.

4. Click **Store Charts/Graphics on the PRISM server**.
5. Select **click here to upload a new image to the server**

6. Click the **Browse** button to search your computer for an image.
7. Click on the desired image, then click the **Open** button.

8. Click the **submit** button to upload your image.
9. Your result screen should look like this. Notice that the screen states your file was loaded successfully. If desired, you may now right-click on the image, copy and paste it into your text box in PRISM.
REVISING AND DELETING OBJECTIVES

Planning

1. Click on the Unit Goals tab

2. Select the detail link that is associated with the unit goal for which you would like to see an objective
3. Click the **update** link on the objective you want to update.
4. Update appropriate fields with any changes that you have.

5. Select the **Update** button to save the changes.

6. To reset all the fields in this form, click the **Reset Form** button.
7. Your result screen should now look like this:

![Screen Image]

**Evaluating**

Evaluation of an objective is addressed in Section III of this manual

*FYI:* The above steps are also used to revise and delete “E” objectives.
1. Click the **Unit Goals** tab

2. Select a **detail** link from the unit goals screen
Adding

3. Select the **Add** button

4. Enter the number of the **InstGoal Supported**

5. Select **OK**
6. Your result screen should now look like this:

![Image of institutional goal screen]

**Removing**

7. Use the arrows to navigate to the desired *Supported Division/Institutional Goal*
8. Select the **Delete** button

9. Your result screen should now look like this:
PRINTING REPORT OF GOALS AND OBJECTIVES

1. Click the *Unit Goals* tab

2. Select the *Print Report of Goals and Objectives* button
3. Select the **File, Print...** menu item

4. Select the **Print** button
5. The report will now print. Select the **Back** button to return to the unit goals screen.

6. Your result screen should now look like this:
PRINTING A REPORT OF ONLY "E" GOALS/OBJECTIVES

1. Click the **Unit Goals** tab

2. Select the **Print Report of Only “E” Goals/Objectives** link
PRINTING A REPORT OF ONLY "E" GOALS/OBJECTIVES (CONTINUED)

3. Select **OK**

![Image of the Jacksonville State University Office of Assessment 2007-2008 Plan]

4. Select the **Print** button

![Image of the Internet Explorer Print dialog box with selected report of "E" goals/objectives]
5. The report will now print. Select the **Back** button to return to the unit goals screen.

6. Your result screen should now look like this:
VIEWING SECTION II OF ANNUAL REPORT ONLINE

1. Click the **Unit Goals** tab

2. Select the **click here to Section II of the Annual Report online** link
3. Your result screen should now look like this:

![Image of Annual Report](image-url)
1. Click the **Unit Goals** tab

2. Select the **Print Section II of Annual Report** button
3. Select **OK**

4. Select the **Print** button
5. The report will now print. Click the **Back** button to return to the unit goals screen.

6. Your result screen should now look like this:
REVIEWING YOUR BUDGET REQUEST

② FYI: Funding requests will travel through the administrative ranks until they reach someone who will/can fund the request. You will be notified by email to check the status of your request once an administrator has acted upon your request.

1. Click the **Unit Goals** tab

2. Select a **detail** link from the unit goals screen. Remember, “E” Goals are not budget driven, so there will be no budget requests visible in the “E” detail.
3. Select an **update** link from the **Objective(s)** list.

4. Budget request information is located on the screen.
Section 1 - Entering System and Viewing Data

Section 2 - Planning an Upcoming Year

Section 3 - Evaluating a Previous Year

Section 4 - Administrators: Reviewing/Approving Requests for Funding
REVIEWING UNIT GOALS

1. To view the goals from your unit, select the **Unit Goals** tab from the menu bar.

2. Your result screen should now look like this, allowing you to view all of your unit’s goals:
REVISING and UPDATING UNIT GOALS

1. Click on the **Unit Goals** tab

2. Select the Unit **Goal** number you would like to edit
3. Select the **Edit** button from the list of options.

4. Enter new information into the text boxes.

5. Click **OK** to update the goal.
REVISING and UPDATING UNIT GOALS (CONTINUED)

6. Your result screen should now look like this, with the edited goal now updated

FYI: To revise and update “E” Goals, follow the steps above.
DELETING UNIT GOALS

1. Click on the **Unit Goals** tab

2. Select the Unit **Goal** number you would like to delete
3. Select the **Delete** button from the list of options

4. Your result screen should look like this, with the goal deleted from the screen.

   ![Image of goal deletion]

   FYI: To delete “E” Goals, follow the steps above.
REVIEWING UNIT OBJECTIVES

1. Click on the **Unit Goals** tab

2. Select the **detail** link that is associated with the unit goal for which you would like to see the objective(s)
3. Your result screen should look similar to the one below. The arrows are pointing to the unit objectives for that particular goal.

© FYI: To review objectives attached to “E” Goals, follow the steps above.
REVISING AND DELETING OBJECTIVES

Evaluating

1. Click on the **Unit Goals** tab

2. Select the **detail** link that is associated with the unit goal for which you would like to see an objective(s)
3. Click the **update** link on the objective you would like to update.
4. Evaluate this goal by entering information in the **Strategy / Assessment / Success Criteria** text box.

5. Select the **Update** button to save the changes.

6. To reset all the fields in this form click the **Reset Form** button.

**FYI:** Remember, objectives attached to “E” Goals will not contain funding request information.
7. Your result screen should now look like this:

![Image of PRISMI Institutional Effectiveness System]

### Planning

The planning of an objective is addressed in Section II of this manual.

### Requesting Funds

The topic of requesting funds is addressed in Section II of this manual.
1. Click on the *Unit Goals* tab

2. Select the *detail* link that is associated with the unit goal for which you would like to see the objective(s)
3. Click **update** for the objective for which you would like to add a graphic or chart.

4. Click **Store Charts/Graphics on the PRISM server**.
5. Select **click here to upload a new image to the server**

6. Click the **Browse** button to search your computer for an image
7. Click on the chosen image, then click the **Open** button

8. Click the **submit** button to upload your image
9. Your result screen should now look like this. Notice that the screen states your file was loaded successfully. If desired, you may now right-click on the image, copy and paste it into your text box in PRISM.
1. Click the **Unit Goals** tab

2. Select a **detail** link from the unit goals screen
ADDING/REVISING INSTITUTIONAL GOAL(S) SUPPORTED (CONTINUED)

Adding

3. Select the **Add** button

4. Enter the number of the **InstGoal Supported**

5. Select **OK**
6. Your result screen should now look like this:

![Image of result screen]

**Removing**

7. Use the arrows to navigate to the desired **Supported Division/Institutional Goal**
8. Select the **Delete** button

9. Your result screen should now look like this:
Printing Report of All Goals/Objectives

1. Click the **Unit Goals** tab

2. Select the **Print Report of ALL Goals/Objectives** button
3. Select the **File, Print...** menu item

4. Select the **Print** button
5. The report will now print. Select the **Back** button to return to the unit goals screen.

6. Your result screen should now look like this:
PRINTING A REPORT OF ONLY "E" GOALS/OBJECTIVES

1. Click the **Unit Goals** tab

2. Select the **Print Report of Only “E” Goals/Objectives** link
3. Select **OK**

4. Select the **Print** button
5. The report will now print. Select the **Back** button to return to the unit goals screen.

6. Your result screen should now look like this:
1. Click the **Unit Goals** tab

2. Select the **click here to Section II of the Annual Report online** link
3. You are now in the annual report screen:

4. Enter the **Number of advertisements in targeted publications/organizations** into the text box

   ![Advertisements Text Box]

5. Enter the **Number of candidates contacted from Minority and Women Doctoral Directory** into the text box

   ![Candidates Text Box]
6. Enter the **Number of African American candidates interviewed for faculty/administrative staff openings** into the text box

   ![Text box]

7. Enter the **Number of African American candidates hired for faculty/administrative staff openings** into the text box

   ![Text box]

8. Enter the **Number of African American faculty/administrative staff engaged in TLC mentoring program** into the text box

   ![Text box]

Publications

9. Enter the number of **Refereed** and **Non-Refereed Scholarly/Professional Journal** entries into the text boxes

   ![Text box]

10. Enter the number of **Refereed** and **Non-Refereed Book Chapters/Other Papers Published** entries into the text boxes

    ![Text box]
11. Enter the number of Refereed and Non-Refereed Complete Books/Manuals Published into the text boxes

12. Enter other Refereed and Non-Refereed Publications into the text boxes

Scholarly Activities

13. Enter the Number of Scholarly/Professional Presentations

14. Enter the Number of Creative Products/Performances
15. Please enter any other *Scholarly Activities* and the *Number* of them

<table>
<thead>
<tr>
<th>Scholarly Activities</th>
<th>Number</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
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</tbody>
</table>

**External Funds**

16. Enter the number of *Funded Grants, Contracts, Other* and their value in dollars

<table>
<thead>
<tr>
<th>Funded Grants, Contracts, Other (funded this year)</th>
<th>Number</th>
<th>Dollars</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
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</tbody>
</table>

17. Enter the number of *Active Grants, Contracts, Other* and their value in dollars

<table>
<thead>
<tr>
<th>Active Grants, Contracts, Other (continued from previous years)</th>
<th>Number</th>
<th>Dollars</th>
</tr>
</thead>
<tbody>
<tr>
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</tbody>
</table>

18. Enter the number of *Current Proposals for Grants, Contracts, Other* and their value in dollars

<table>
<thead>
<tr>
<th>Current Proposals for Grants, Contracts, Other (in development or not yet funded)</th>
<th>Number</th>
<th>Dollars</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
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</tr>
</tbody>
</table>
19. Enter any other *External Funds*, their number, and their value in dollars

<table>
<thead>
<tr>
<th>External Funds</th>
<th>Number</th>
<th>Dollars</th>
</tr>
</thead>
<tbody>
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**Part I: Significant Accomplishments to President**

20. Fill out the *Significant Accomplishments for the Annual Report to the President* field
Part II: Significant Accomplishments Narrative for Published

21. Fill in the *Significant Accomplishments Narrative for Published Version of the Annual Report* field

22. Select the *Save* button
23. Your result screen should now look like this:
1. Click the **Unit Goals** tab

2. Select the **click here to Section II of the Annual Report online** link
3. Your result screen should now look like this:
1. Click the **Unit Goals** tab

2. Select the **Print Section II of Annual Report** button
3. Select **OK**

4. Select the **Print** button
5. The report will now print. Select the **Back** button to return to the unit goals screen.

6. Your result screen should now look like this:
Section 1 - Entering System and Viewing Data

Section 2 - Planning an Upcoming Year

Section 3 - Evaluating a Previous Year

Section 4 - Administrators: Reviewing/Approving Requests for Funding
**FYI:** Departments you are authorized to view/edit can be accessed through the *Units* tab.

1. From the tab bar at the top of the screen, select the *Units* tab.

2. Your screen should now look like this, allowing you to view/edit unit (departmental) requests:
1. From the tab bar at the top of the screen, select the *Units* tab

2. To view unit (department) details, select the *Unit details* link for the desired unit
3. Your screen should now look like this, allowing you to view unit details:

![Unit Details Image]
1. From the tab bar at the top of the screen, select the **Units** tab.

2. Select the **Unit detail** link for the desired unit.
4. Your screen should now look like this:

5. Select the **Edit** button

(Task continues on next page . . .)
After selecting the *Edit* button, the unit details should be displayed in an editable form as shown:

6. Enter information into the text box for the item(s) to be edited.

7. Select **OK** to edit form or the **Cancel** button to void any changes and go back to the unit details screen.

8. Select the **Back** button to return to the previous screen.
1. To view unit (departmental) goals, select the **Units** tab

2. Select the **Unit goals** link
3. Your results screen should now look like this:
VIEWING UNIT OBJECTIVES

1. To view unit objectives, select the **Units** tab on the tab bar

2. Select the **Unit goals** link
3. Select the **detail** link that is associated with the unit goal for which you would like to see the objective(s)

4. Your result screen should look similar to the one below:
1. To print a report, select the **Units** tab on the tab bar.

2. Select the **Unit goals** link.
3. Select the **Print Report of Goals and Objectives** button

4. Select the **File, Print...** menu item
5. Select the **Print** button

6. The report will now print. Select the **Back** button to return to the previous screen

7. Your result screen should now look like this:
1. To view Institutional Goals supported by the unit goals, select the Units tab on the tab bar.

2. Select the Unit goals link.

PRINTING REPORT OF ONLY "E" GOALS/OBJECTIVES
3. Select the **Print Report of Only “E” Goals/Objectives** link

![Print Report of Only “E” Goals/Objectives](image)

4. Select **OK**

![Output of the Print Report](image)
5. Select the **Print** button

6. The report will now print. Select the **Back** button to return to the unit goals screen.
7. Your result screen should now look like this:
1. To view Section II of the Annual Report, select the **Units** tab on the tab bar.

2. Select the **Unit goals** link.
VIEWING SECTION II OF THE ANNUAL REPORT (CONTINUED)

3. Select the **click here to Section II of the Annual Report online** link

4. Your result screen should now look like this:
1. To print Section II of the Annual Report, select the Units tab on the tab bar.

2. Select the Unit goals link.
3. Select the **Print Section II of Annual Report** button

4. Select **OK**
5. Select the **Print** button

6. The report will now print. Click the **Back** button to return to the unit goals screen.

7. Your result screen should now look like this:
1. To view *Institutional Goals* supported by the unit goals, select the *Units* tab on the tab bar.

2. Select the *Unit goals* link.
3. Select a **detail** link from the unit goals screen

4. Your screen should now look like this:
Reviewing Funding Requests

1. After selecting the **Units** tab, select the **Review / Approve** button.

2. Your results screen should now look like this:
DEAN: REVIEWING / APPROVING FUNDING
(CONTINUED)

Approving Funding Requests

3. To update the status of the request click on the Status drop-down menu and select the desired status.

4. To give a specific amount of money for a request, enter the amount in the Dean/Dir Request text box.
   - Amount can ONLY be entered as a whole number.
     Example 100, 102, 250

   To determine a priority level for a particular request, enter the priority level, such as 1, 2, 3, in the Dean/Dir Priority text box.
5. To update requests for funding, select one of the **Update** buttons located at the top and the bottom of the form.

6. To print the form, select the **Print** button.

7. To notify the department of funding status, select the **Notify Department** button.
Reviewing Funding Requests

1. Select **VP Review / Approve** button from the viewing units screen

2. Your results screen should now look like this:
Approving Funding Requests

1. To update the status of the request, click on the **VP Status** drop-down menu and select the desired status from the list.

2. To determine a priority level for a particular request, enter the priority level, such as 1, 2, 3, in the **VP Priority** text box.

3. To give a specific amount of money for a request, enter the amount in the **VP Request** text box.

   - Amount can ONLY be entered as a whole number. Example 100, 102, 250
4. To update requests for funding, select the action from the **Update Action** drop-down menu.

5. Select the **Update** button which is located at the top or the bottom of the page.

6. To notify the department of funding status, select the **Notify Department** button.
1. To select another planning year, select the **Units** tab on the tab bar.

2. Select the **Click here to select another Planning Unit or Year** link.

3. Click the **Planning Unit** drop-down menu and select the correct unit.

4. Click the **Planning Year** Drop-down menu and select the correct year.

5. Select OK.
6. Your screen should now look like this:

![Image of a screen showing various goal statements and options like "View or Print a report of Unit goals or "E" goals (and view or print the associated objectives)".

From this screen, you can:

- View or Print a report of Unit goals or “E” goals (and view or print the associated objectives)
- View details of Institutional Goals supported by unit goals
- View or Print Section II of the Annual Report
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