

Rolling-up Plans in Planning and Program Review

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February, 2011
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Prioritizing Objectives at Three Levels

- Department Level
 - Chairs
 - Examples: Business, Economics and Information Technology; Public Safety and Services; English and Reading
- Division Level
 - Deans
 - Arts and Sciences; Career Education & Human Development; Instructional Support
- Area
 - Administrative Services, Instruction, President, Student Services

Logging-In

- When a Chair, Dean, VP, or the President logs in they have the ability to...
 - ...not only create and edit a Department, Division, or Area plan
 - ...but they can also roll up the goals and resource requests for the Department, Division, or Area
- Chair → Department
- Dean → Division
- VPs/President → Area

Available Submitted Plans

You may view submitted plans for these entities. Entities without a link do not have any submitted plans available for viewing.

- CHC

- [Administrative Services Area](#) ←

- [Administrative Services Office](#)
- [Bookstore](#)
- [Cafeteria](#)
- Campus Business Office
- Communications
- Custodial
- [Grounds](#)
- [Maintenance](#)

- Instruction ←

- Arts and Sciences ←
 - Biological Science and Physical Science
 - Anatomy
 - Biology
 - [Chemistry](#)
 - Earth Science (Geology / Geography / Oceanography)
 - Microbiology
 - Physics / Astronomy
 - [Business, Economics and Information Technology](#) ←
 - [Business Administration / Accounting / Marketing](#)
 - [Computer Information Systems](#)
 - [Economics](#)
 - Communication and Language

Area

Division

Department

Rolling Up a Plan (Combining Objectives)

- Step 1 – Click on the Department, Division, or Area Level

- 
- [Test Parent](#)
 - [Test 1](#)
 - [Test 2](#)
 - [District](#)
 - [Distributed Education and Technology Services](#)
 - [Distributed Education](#)
 - [District Computing Services - Administrative Services](#)
 - [District Computing Services - Technical Services](#)
 - [EduStream](#)
 - [Print Shop](#)
 - District Police Department
 - EDTC

Rolling Up a Plan (Combining Objectives)

- Step 2 – Click on **“Create Plan”**

Plans for Test Parent

- [Create Plan](#)
- [Create Plan by Copy](#)

- **Name:** New Test Div Plan
Version: 2
Group: 2010 - 2011
Type: CHC Program Review
Last Modified On: 10/12/2010 3:33:13 PM
Last Modified By: Keith Wurtz
State: Locked for Editing
State By: Keith Wurtz

- [Edit Plan](#)
- [View Versions](#)
- [View Objective Priority List](#)
- [Reports](#)
- [View Plan](#)
- [Submit Plan \(Draft\)](#)
- [Submit Plan \(Finalized\)](#)
- In order to delete this plan, it must be unlocked.
- In order to comment on this plan, it must be submitted and not locked.

Rolling Up a Plan (Combining Objectives)

- Step 3 – Add a Plan Name, Plan Type, and Plan Group

[Plans for Test Parent](#) >> New Plan

Entity Name : Test Parent

* **Plan Name :**

* **Plan Type** ▼

CHC Roll Up Plan

* **Plan Group** ▼

This Entity has children. Please select plans below to roll up their Goals and Resource Requests.

Are you sure you want to create a new plan for this entity?

Rolling Up a Plan (Combining Objectives)

- Step 4 – Select the plans while holding down the control key



[Plans for Test Parent](#) >> New Plan

Entity Name : Test Parent

* **Plan Name :**

* **Plan Type** CHC Roll Up Plan / ▼

* **Plan Group** 2010 - 2011 ▼

This Entity has children. Please select plans below to roll up their Goals and Resource Requests.

Test2: Copy of Test2 Program Review
Test1: Test Unit Plan 1

Are you sure you want to create a new plan for this entity?

No

Yes

Rolling Up a Plan (Combining Objectives)

- Step 5 – Click
“Yes”

[Plans for Test Parent](#) >> New Plan

Entity Name : Test Parent

* **Plan Name :**

* **Plan Type**

* **Plan Group**

This Entity has children. Please select plans below to roll up th

Test2: Copy of Test2 Program Review
 Test1: Test Unit Plan 1

Are you sure you want to create a new plan for this entity?

Rolling Up a Plan (Combining Objectives)

- The new roll-up plan has been created
- You can view and edit the plan and objectives just like you can with other plans

• Name: Test Plan Roll-Up

Version: 1

Group: 2010 - 2011

Type: CHC Roll Up Plan

Last Modified On: 2/9/2011 9:25:25 AM

Last Modified By: Keith Wurtz

State: Available for Editing

State By: Keith Wurtz

◦ [Edit Plan](#)

◦ [View Versions](#)

◦ [View Objective Priority List](#)

◦ [Reports](#)

◦ [View Plan](#)

◦ [Submit Plan \(Draft\)](#)

◦ [Submit Plan \(Finalized\)](#)

◦ [Delete Plan](#)

◦ In order to comment on this plan, it must be submitted and not locked.

Rolling Up a Plan (Combining Objectives)

- Step 6 – Click on “**Reports**” to roll-up the objectives and resources into Excel

• **Name:** Test Plan Roll-Up

Version: 1

Group: 2010 - 2011

Type: CHC Roll Up Plan

Last Modified On: 2/9/2011 9:25:25 AM

Last Modified By: Keith Wurtz

State: Available for Editing

State By: Keith Wurtz

- [Edit Plan](#)
- [View Versions](#)
- [View Objective Priority List](#)
- [Reports](#)
- [View Plan](#)
- [Submit Plan \(Draft\)](#)
- [Submit Plan \(Finalized\)](#)
- [Delete Plan](#)
- In order to comment on this plan, it must be submitted and not locked.

Rolling Up a Plan (Combining Objectives)

- Step 7 – Click on **“Priority Report”** to roll-up the objectives and resources into Excel

Planning & Program Review - Mozilla Firefox

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craftonhills.edu https://www.craftonhills.edu/ProgramReview/Plan.aspx

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[Plans for Test Parent](#) >> [Test Plan Roll-Up](#) >> Reports

- [Priority Report](#)

Rolling Up a Plan (Combining Objectives)

- For each program the following fields are exported to Excel: Department, Department Priority, Unit, Unit Priority, Objective ID, Objective Description, Resource ID, Resource Description, Resource Type, Year 1-3 Cost, and Year 1-3 Savings

The screenshot shows the Microsoft Excel interface with the following data in the spreadsheet:

	A	B	C	D	E	F	G	H	I	J
1	Department	Department Priority	Unit	Unit Priority	Objective Id	Objective Description	Resource Id	Resource Description	Resource Type	Year 1 Cost
2	Test Parent		1 Test 1	1	1.1	Nunc dui sapien, pulvinar ne	1.1.1	Printing costs for X,000 fou	OnGoing	30
3	Test Parent		6 Test 1	6	1.2	Pellentesque lobortis facilis augue. Pellentesque lobortis pharetra sem id aliquam. Vivamus dictum est ve				
4	Test Parent		3 Test 1	3	1.3	asef				
5	Test Parent		2 Test 1	2	1.4	asdf				
6	Test Parent		1 Test 2	1	2.1	salfjsladj kf	2.1.1	I-phone	OneTime	
7	Test Parent		4 Test 1	4	3.1	oiahf yas yu yad879 8y				
8	Test Parent		5 Test 1	5	4.1	k i iu ihlkj l adf asdf				

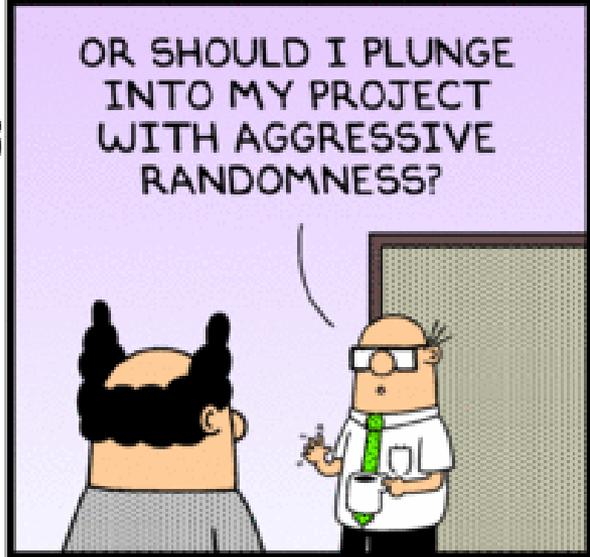
Rolling Up a Plan (Combining Objectives)

- Important to Remember
 - Only Plans that are (**Finalized**) are rolled-up

Questions



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