# CHC WebPPR: The Basics, with Screen Samples

Note: WebPPR has many new features, so it might change during this shakedown cruise, which means that some of these screenshots might become inaccurate. Please be patient, and if you experience problems that your unit leader can't resolve, contact the new Help Desk at 877-241-1756 or stac.sbccd.org. Thank you!

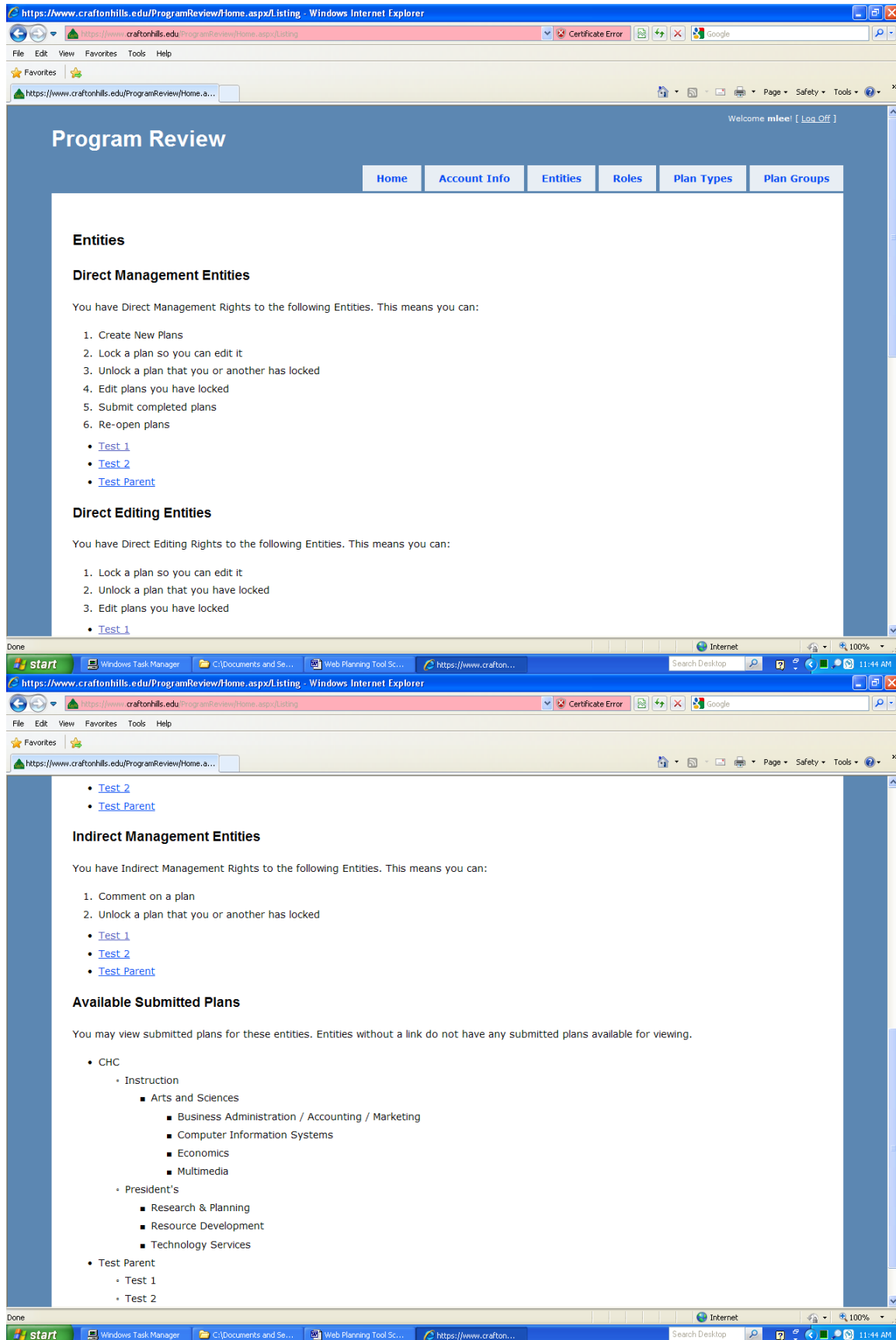1. Opening screen at www.craftonhills.edu/programreview; click *Log On* at upper right.
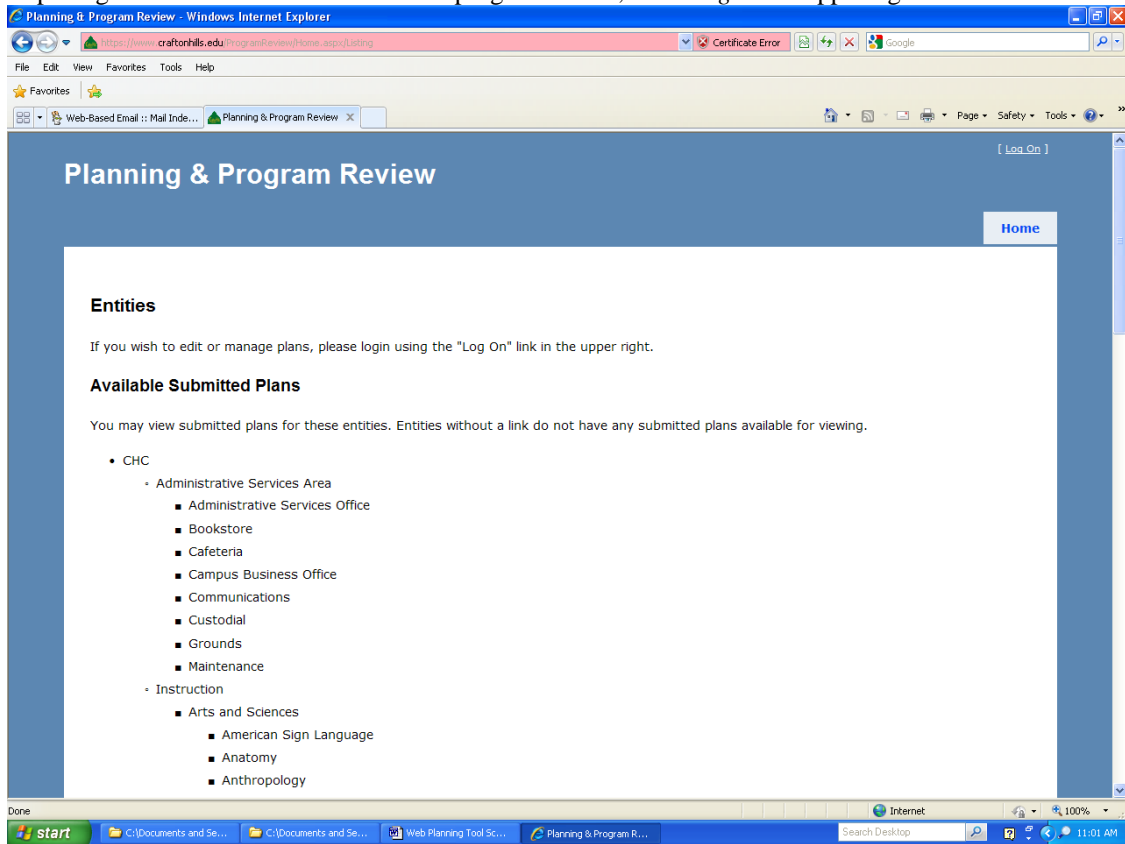
2. Logon screen; enter regular user name and password, and click the <Log On> button at the bottom.
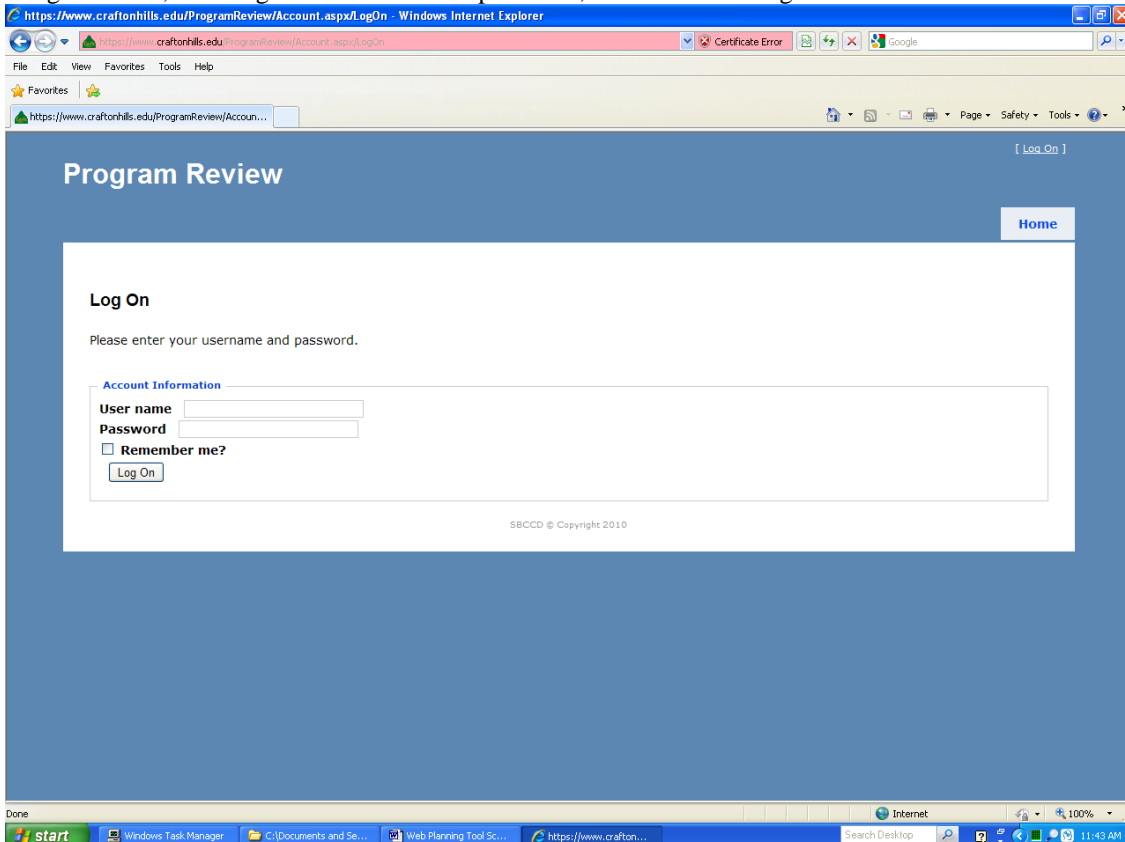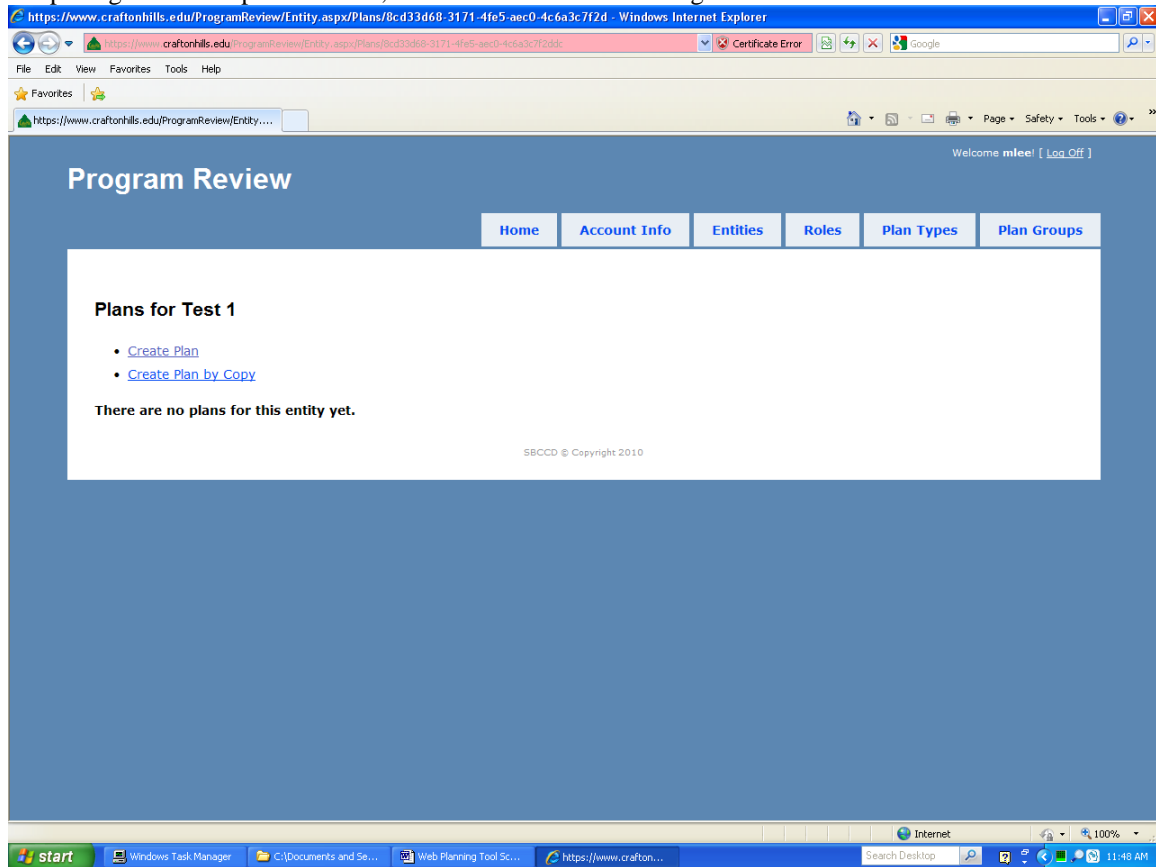
3. Opening screen after logon, parts 1 and 2; shows editing and management rights and available submitted plans. I clicked on *Test1* link in Direct Management section, so I can create a plan (as a unit leader would) on the next screen.

Program Review

| Home | Account Info | Entities | Roles | Plan Types | Plan Groups |

Entities

Direct Management Entities

You have Direct Management Rights to the following Entities. This means you can:

1. Create New Plans
2. Lock a plan so you can edit it
3. Unlock a plan that you or another has locked
4. Edit plans you have locked
5. Submit completed plans
6. Re-open plans

- Test 1
- Test 2
- Test Parent

Direct Editing Entities

You have Direct Editing Rights to the following Entities. This means you can:

1. Lock a plan so you can edit it
2. Unlock a plan that you have locked
3. Edit plans you have locked

- Test 1

- Test 2
- Test Parent

Indirect Management Entities

You have Indirect Management Rights to the following Entities. This means you can:

1. Comment on a plan
2. Unlock a plan that you or another has locked

- Test 1
- Test 2
- Test Parent

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
  - Instruction
    - Arts and Sciences
      - Business Administration / Accounting / Marketing
      - Computer Information Systems
      - Economics
      - Multimedia
  - President's
    - Research & Planning
    - Resource Development
    - Technology Services
- Test Parent
  - Test 1
  - Test 2

4. Opening screen for plan creation; I clicked on *Create Plan* to go to next screen.

5. Plan creation screen, for unit leaders. I entered a Plan Name (Test Unit Plan 1), Plan Type (CHC Program Review), and Plan Group (2010-11), then clicked the <Yes> button.
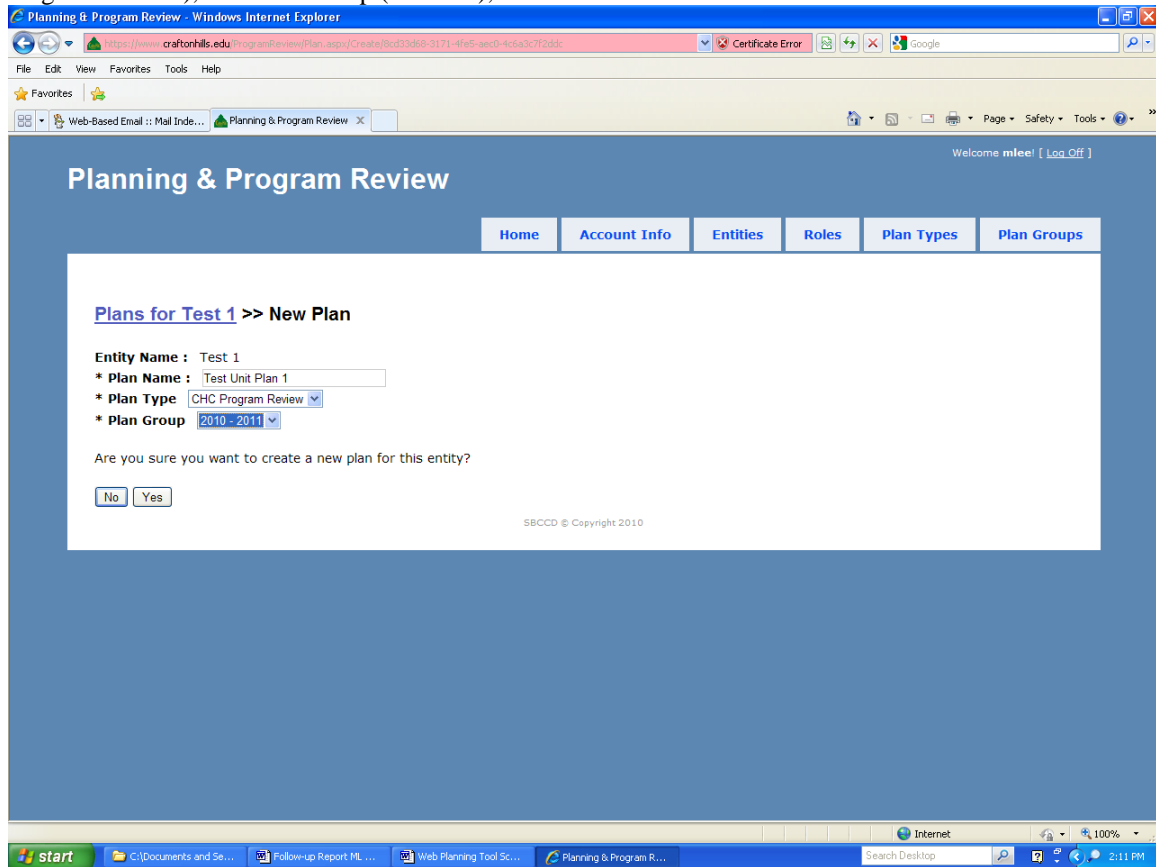
6. Back to the opening screen for plan creation or editing. The plan I just created now appears; I clicked on *Edit Plan* under it to begin filling in the plan on the next screen.
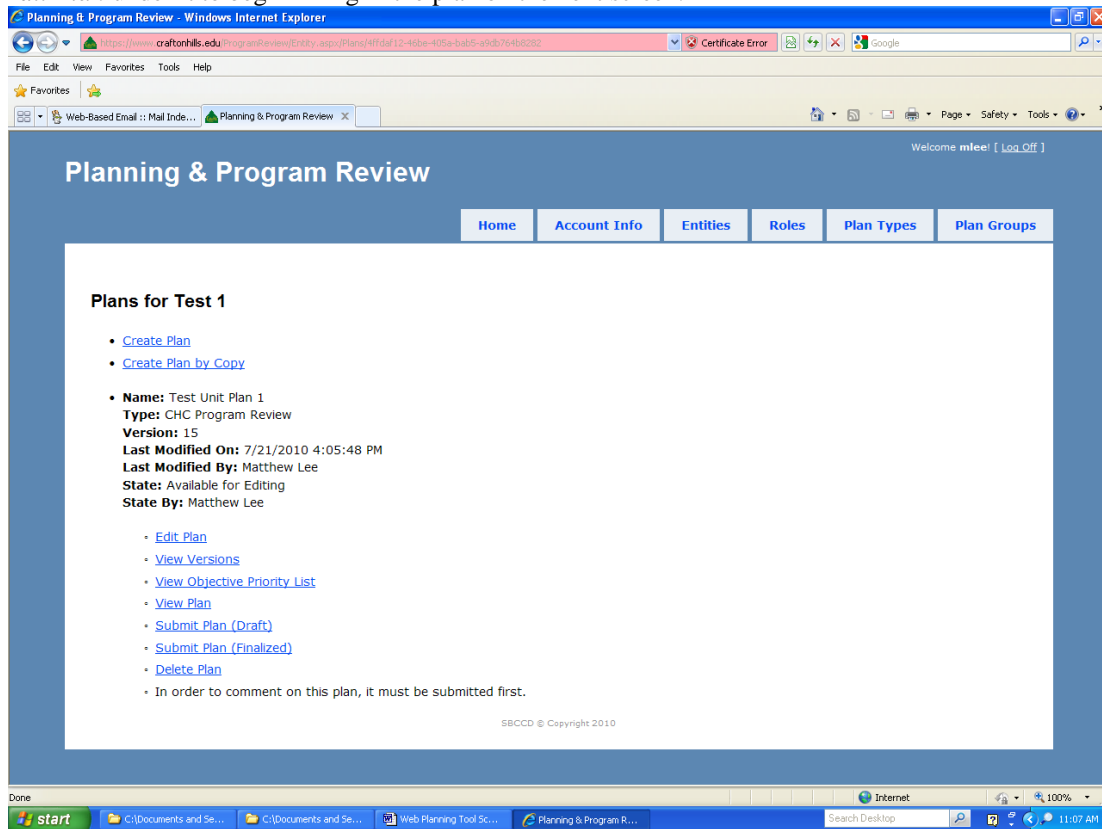
7. If the plan is not already locked, click *Lock plan for editing* on this screen, so that you can begin entering information. Or you can just scroll down to read the plan. When the plan is locked for editing, only the person who locked the plan can make changes. All other users with Direct Editing Rights can still access and read the plan.
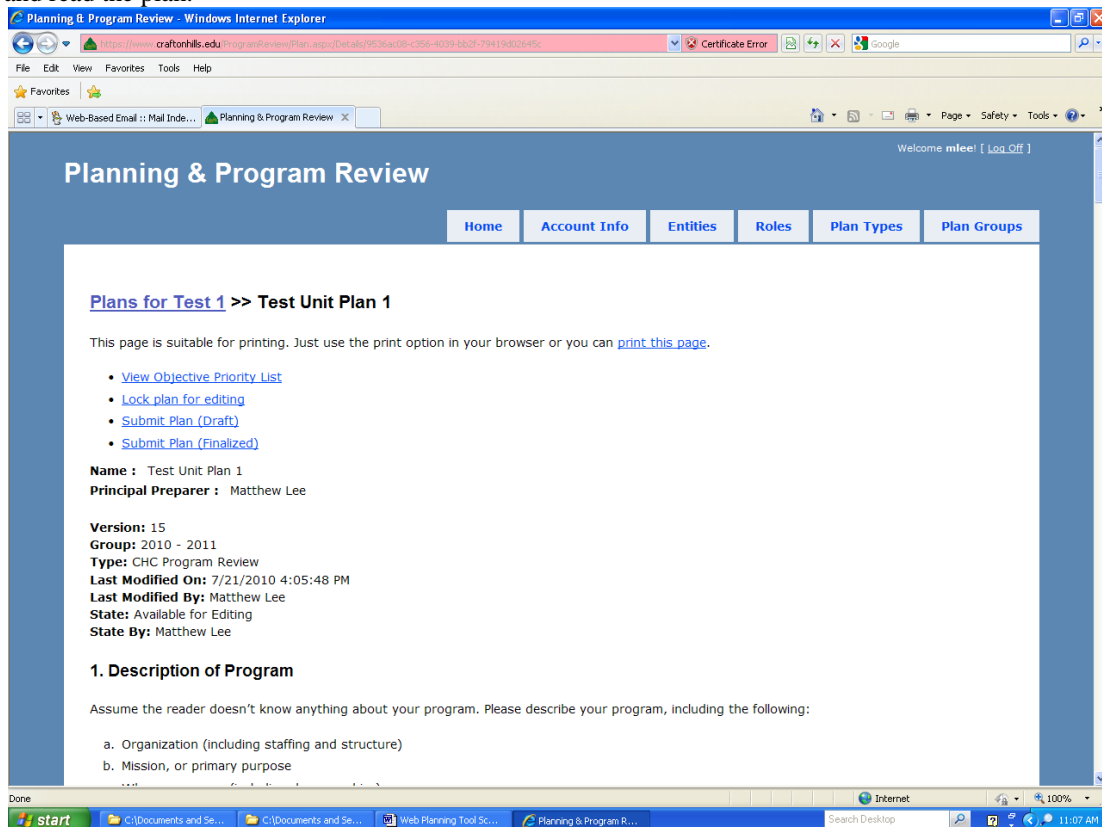
8. Edit Tasks screen, parts 1 and 2 of many; this is your base for all editing and submission functions. I first clicked on *Edit texts for plan*.

Note: See the *CHC Integrated Planning and Program Review Handbook* for details on the whole process.

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9. Edit Texts screen, which mirrors the program review form. This is where you create or edit most sections of the plan, either by cutting and pasting or by direct entry. The rudimentary word processor works best with straight text or outlines, not tables or graphics. Start by entering the principal preparer's name, and go section by section from there.

When you have finished editing for the time being, be sure to click on the <Save> button. After a moment, "Item Updated" will appear in green type at the top of the Edit Texts screen. Now you may continue entering or editing information here, or go back to Screen 8 to do other tasks by clicking on the name of your plan at the top of the screen—in this case, it's *Test Unit Plan 1*.
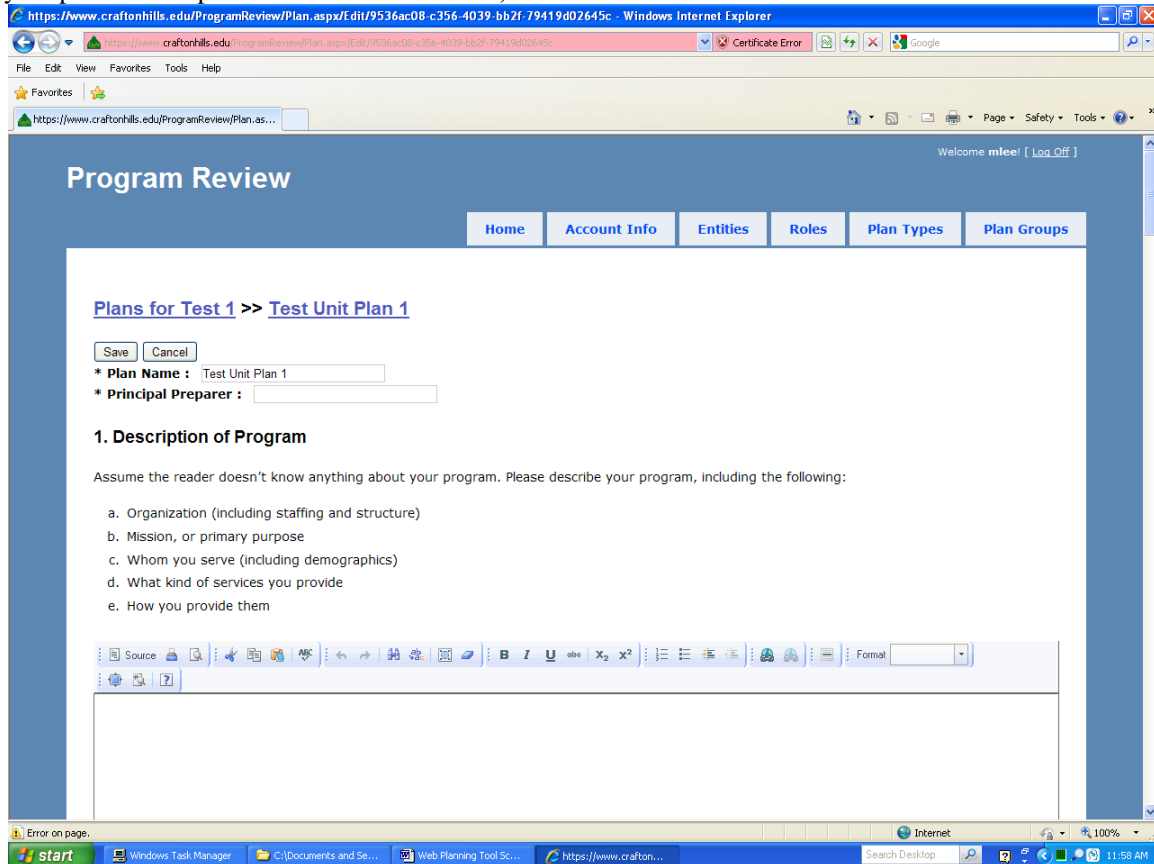
10. Now I have clicked on *Edit supporting documents for plan* on Screen 8. This is where you attach documents that are too long or complex to cut and paste directly into the section windows. Just click the <Browse> button to find your file, select it, and click <Submit>; repeat the process for each file you wish to attach. Be sure to refer to the attached document in the applicable section of your plan.
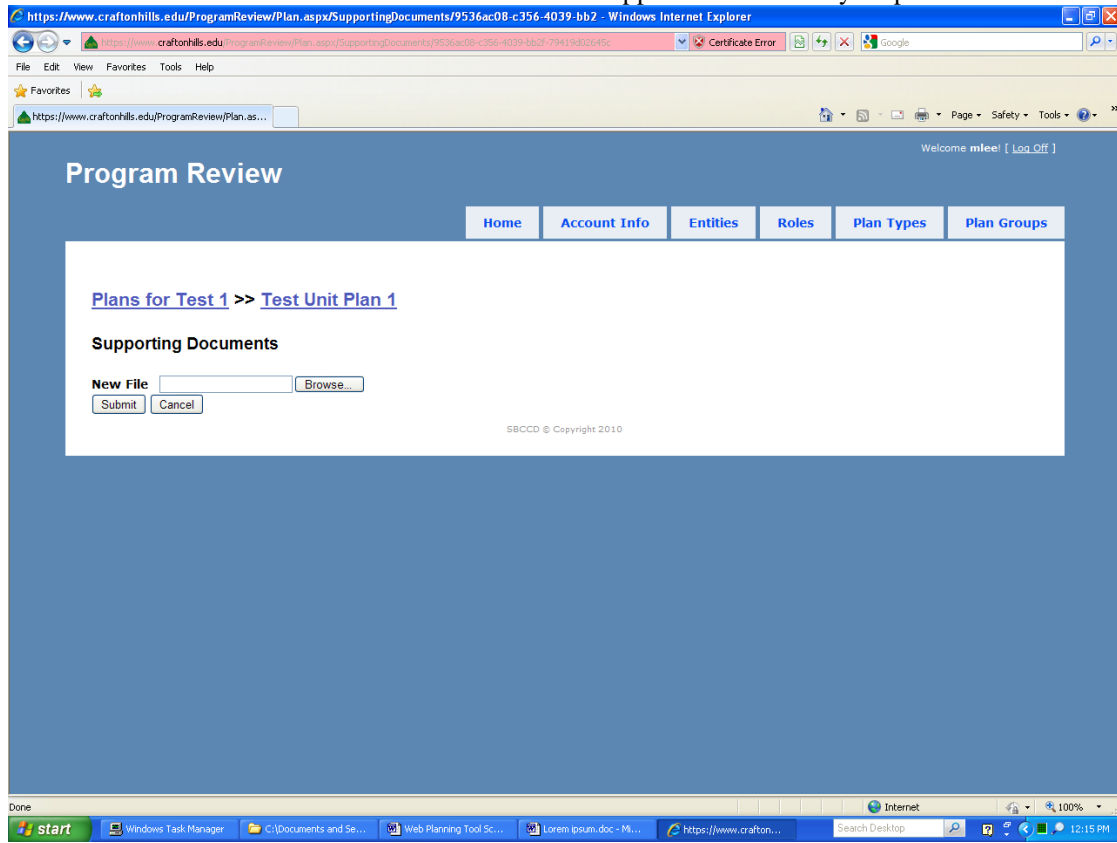
11. Now I have clicked on *Edit goals/objectives/activities for plan* on Screen 8. You'll work on all goals, objectives, and activities from here. Start by clicking *Add Goal*.
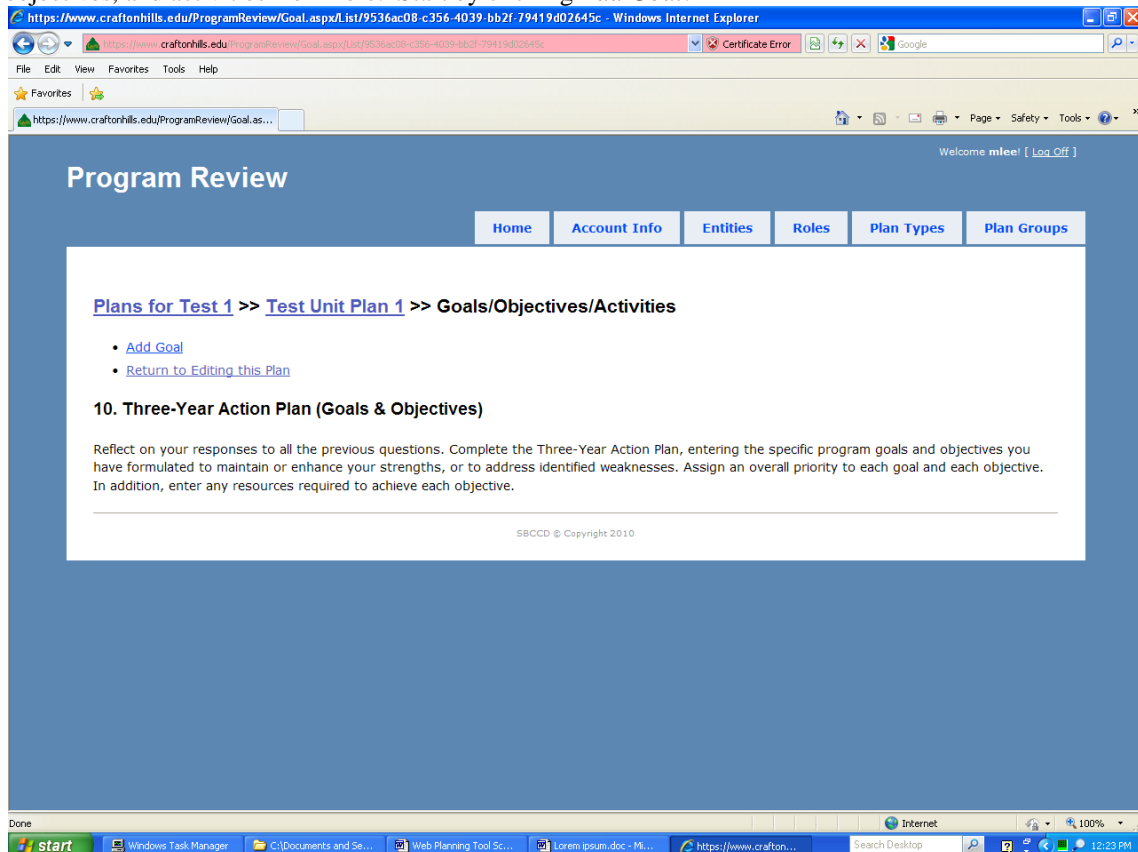
12. Now I have clicked on *Add Goal* on Screen 11, and have entered the name and description of my most important goal here, with a priority rank of 1. You can change both the order of appearance and the priority rank later if you wish, but entering the goals in priority order from the beginning makes the process easier. Click <Save> when you're done with this goal, and you'll go back to Screen 11.

13. Now the goal is listed, and you can click on it to edit it if you wish. Click on the little plus (+) sign to its right to add objectives.

14. I have named and described the objective, and assigned an overall priority, timeline, and responsible person to it. All the fields shown must be filled in for each objective. Don't worry about precise dates at this point; just pick a month to start, and an end month that represents a reasonable amount of time to reach the objective. Be sure to click <Save>.

15. Now the objective is listed under the goal, and you can click on it to edit it if you wish. Click on the (+) sign to its right to add specific activities, which are optional but helpful in organizing the work on the objective.
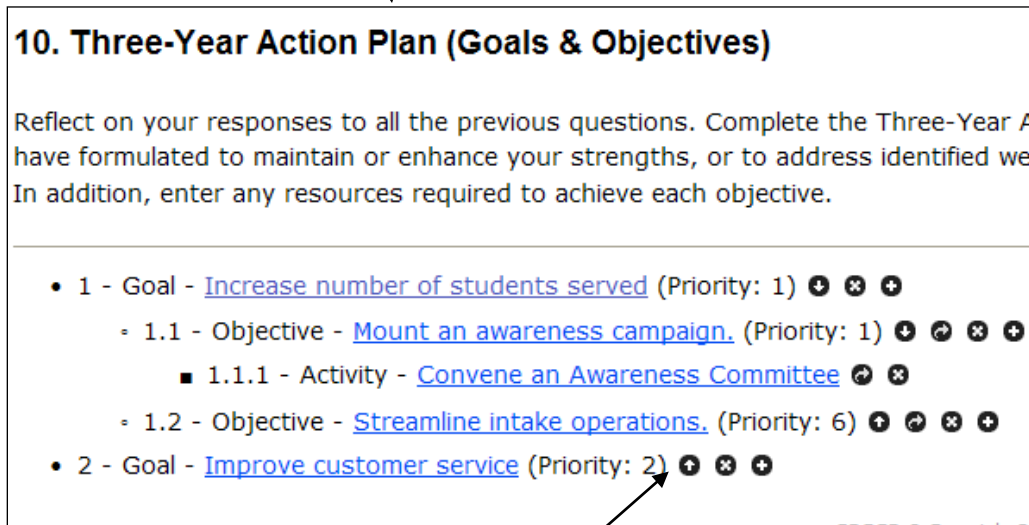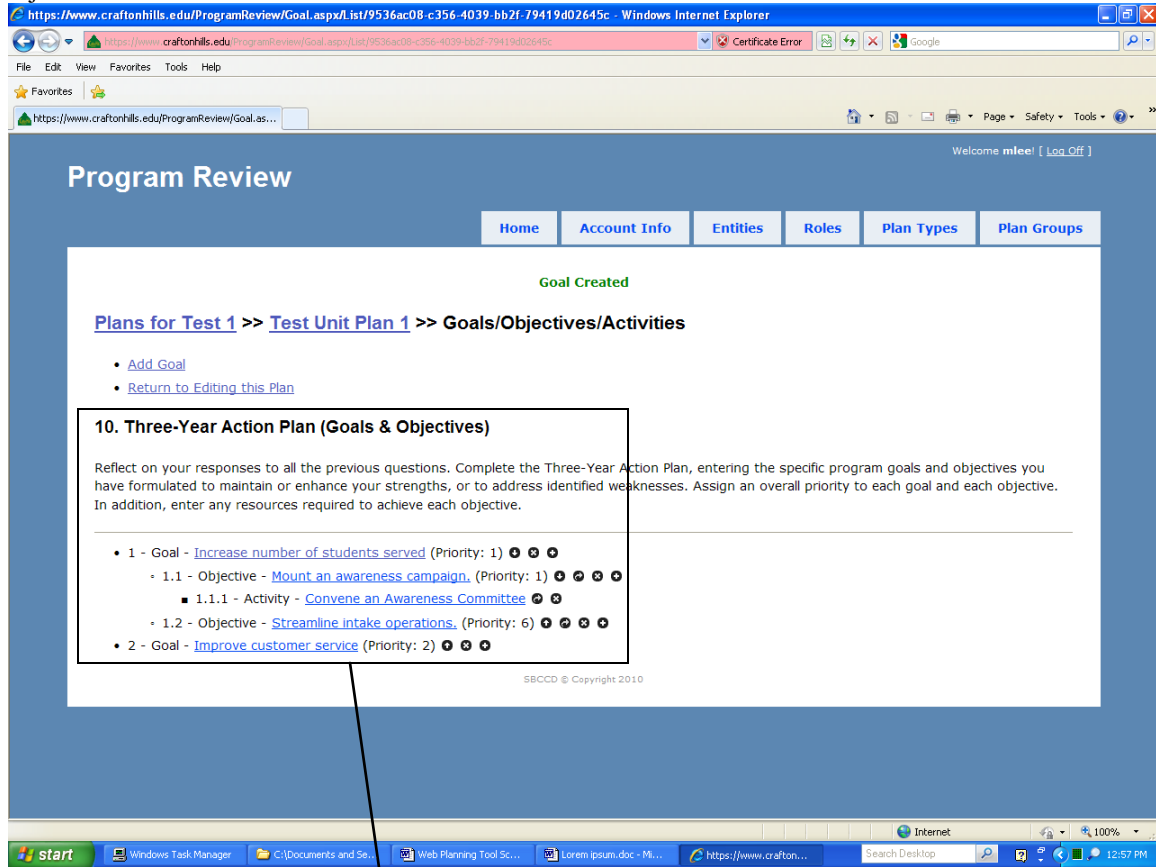
16. I have named and described the activity, and assigned a timeline and responsible person to it. All fields are optional. Be sure to click <Save>.
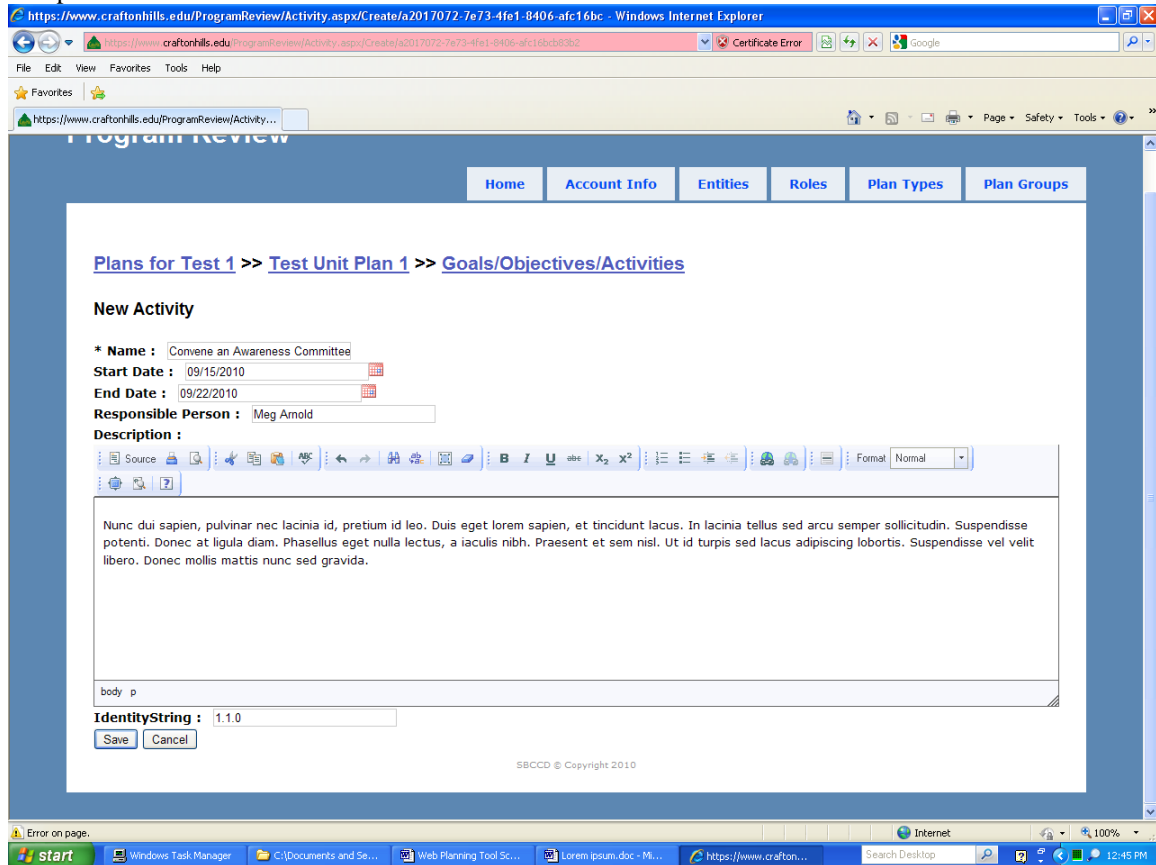
17. Now the activity is listed under the objective, and you can click on it to edit it if you wish.
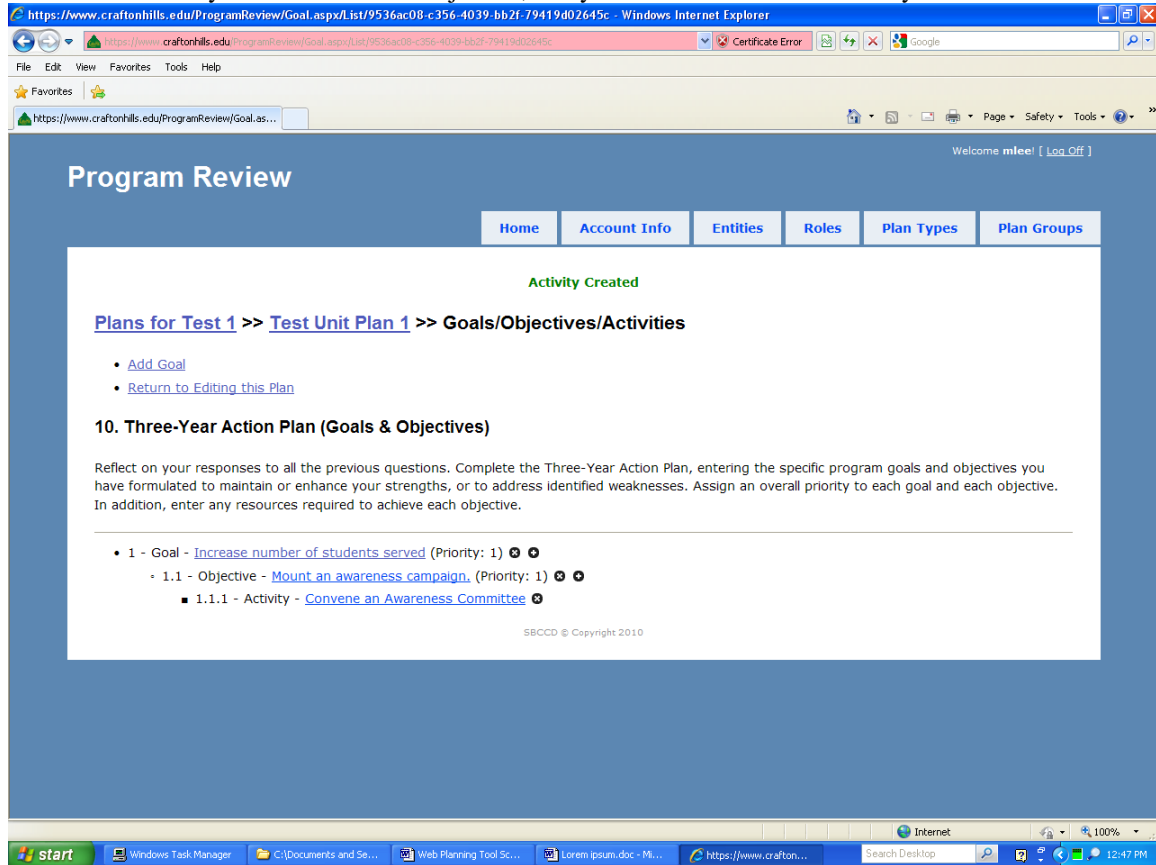
18. Here I have added another goal and another objective under one of them. Note the little arrows that now appear to the right of each goal and objective. Use those arrows to change the order in which the goals and objectives are listed. Changing the order of appearance does *not* change the priority of the goal or objective.

10. Three-Year Action Plan (Goals & Objectives)

Reflect on your responses to all the previous questions. Complete the Three-Year A
have formulated to maintain or enhance your strengths, or to address identified wea
In addition, enter any resources required to achieve each objective.

- 1 - Goal - <u>Increase number of students served</u> (Priority: 1)
    - 1.1 - Objective - <u>Mount an awareness campaign.</u> (Priority: 1)
        - 1.1.1 - Activity - <u>Convene an Awareness Committee</u>
    - 1.2 - Objective - <u>Streamline intake operations.</u> (Priority: 6)
- 2 - Goal - <u>Improve customer service</u> (Priority: 2)

Clicking on this arrow will move the goal up.

19. Here I have clicked on *Edit resource requests for plan* back on Screen 8. If achievement of an objective requires any additional resources, click the (+) sign by that objective.

20. I clicked the + sign by Objective 1.1 on screen 19, and named and entered the description, rationale (based on my objective), type, category, and estimated cost for my resource request. Enter each resource request separately. Be sure to click <Save>.
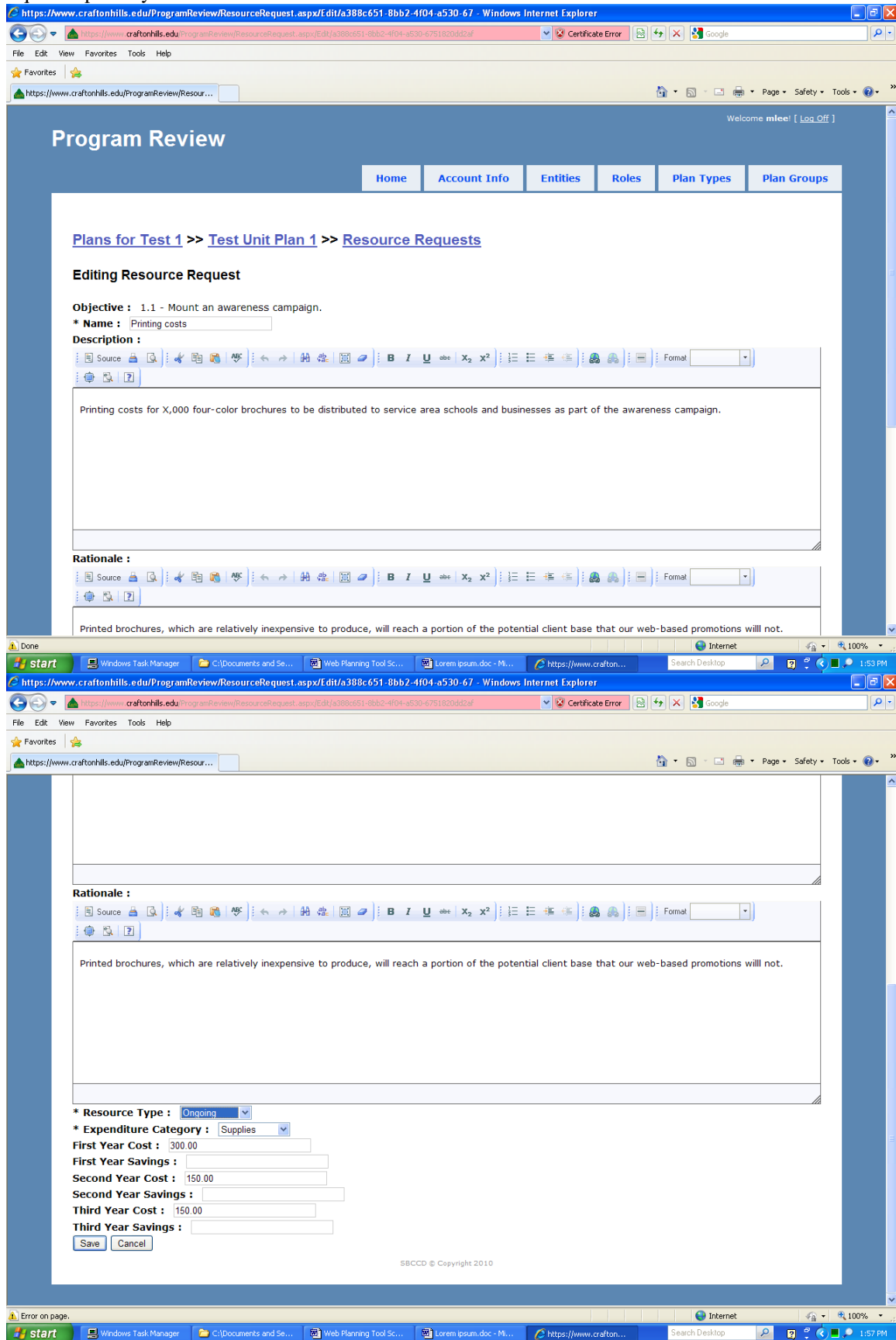
21. Now the new resource request appears next to the objective, and you can click on it to edit it if you wish.

Note: See the *CHC Integrated Planning and Program Review Handbook* for details on the whole process.

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22. Here I have clicked on *Unlock Plan* on Screen 8 so that I could submit the plan.

23. Now I have clicked on *Submit Plan (Draft)* on Screen 22, which you would do when the unit is ready for feedback on your draft plan. To edit the plan after receiving feedback, click on *Reopen Plan*.

24. Here I have clicked on *Submit Plan (Finalized)* on Screen 22, the final step in the process for each unit.
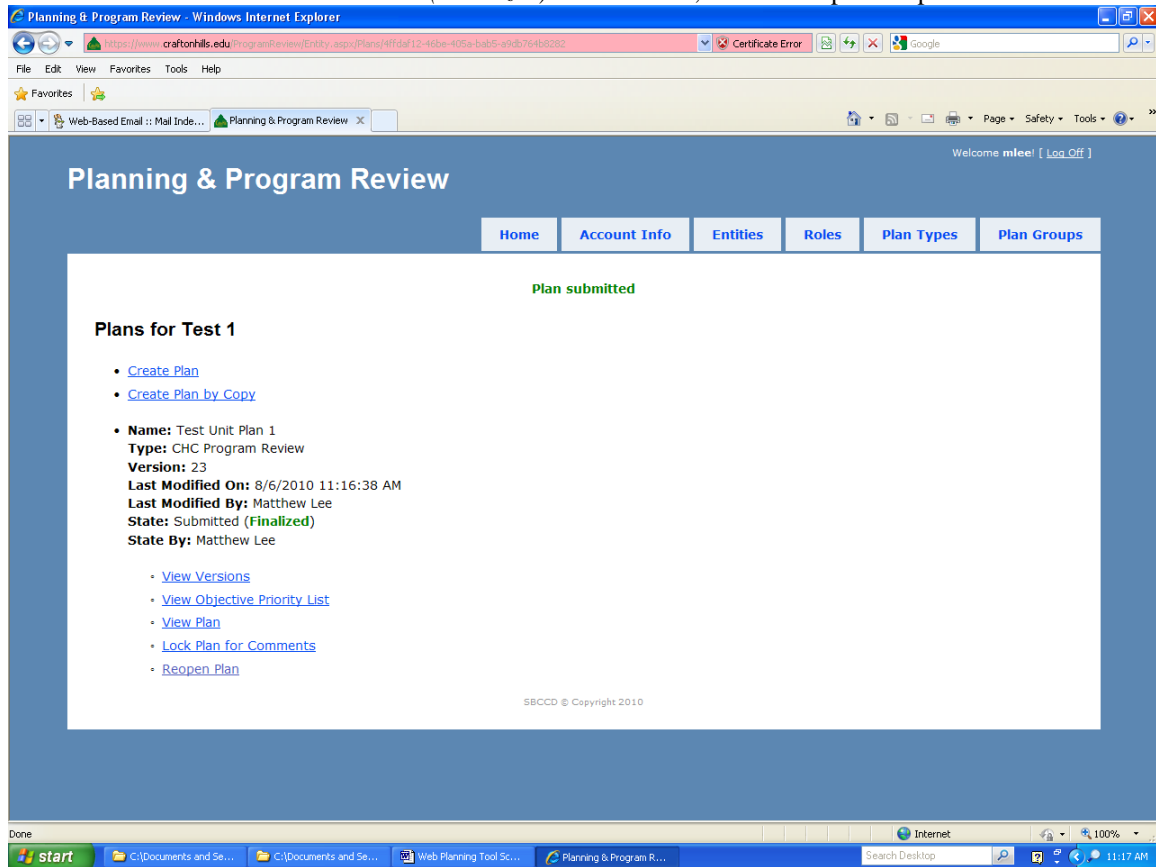
25. Now I have clicked on *View Versions* on Screen 23 or 24. I can view any of the successive versions of the plan here, or compare two versions to find out which text sections have changed from one to the other.
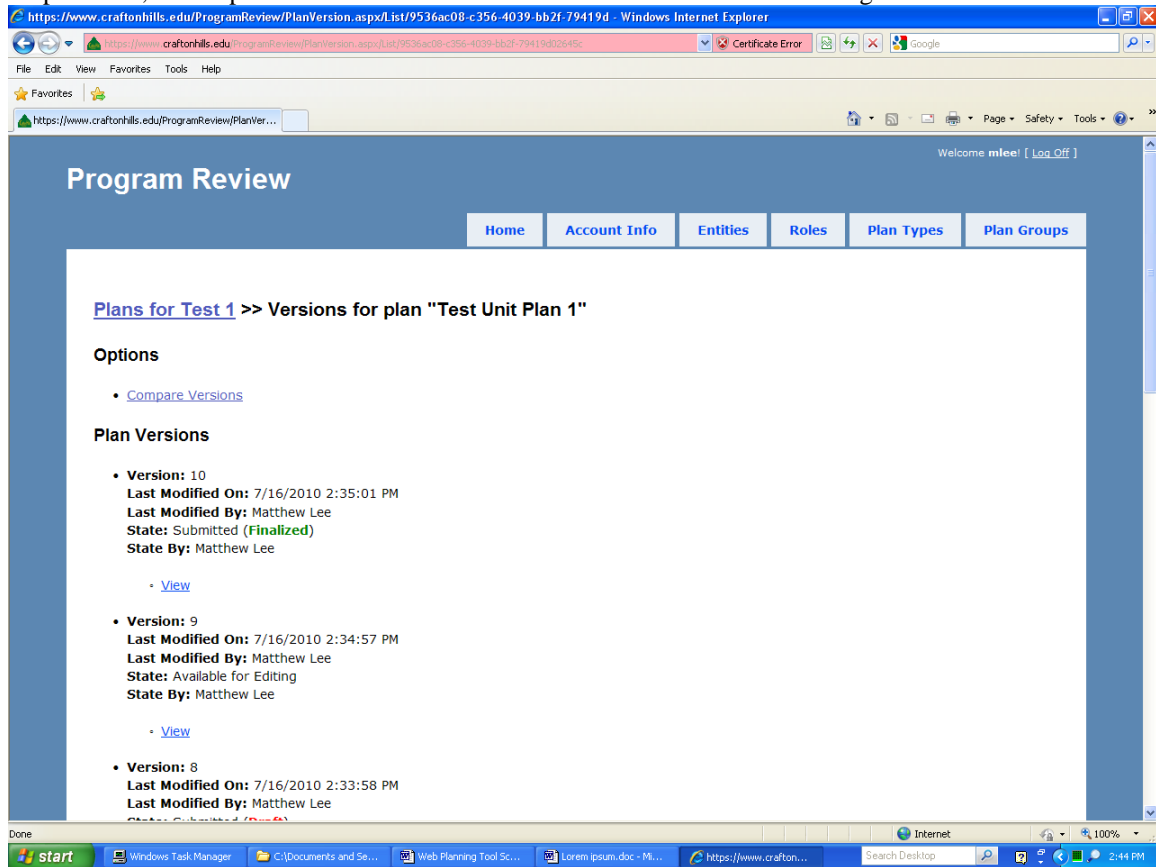
26. Here I have clicked on *Compare Versions* on Screen 25, and have entered the two versions I wish to compare. Now I will click on <Select>.
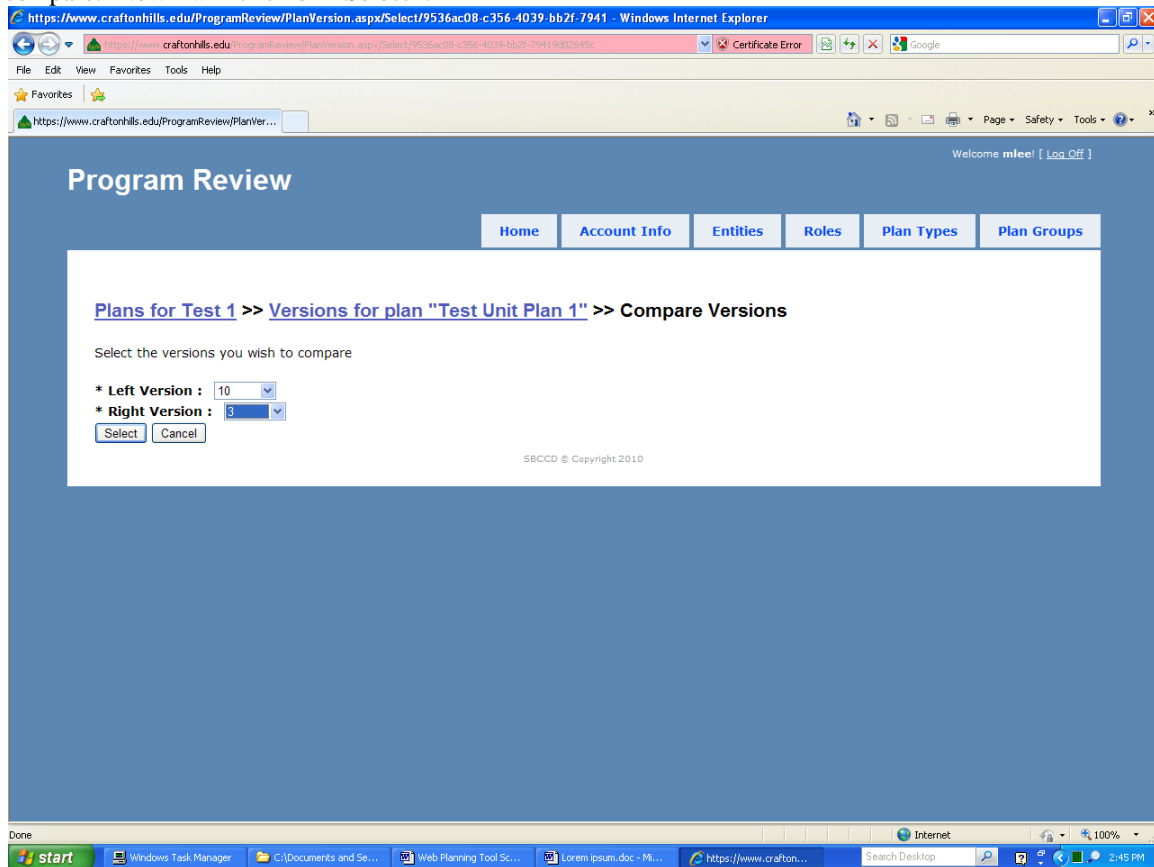
27. The system shows me the six text sections that differ between versions 3 and 10.
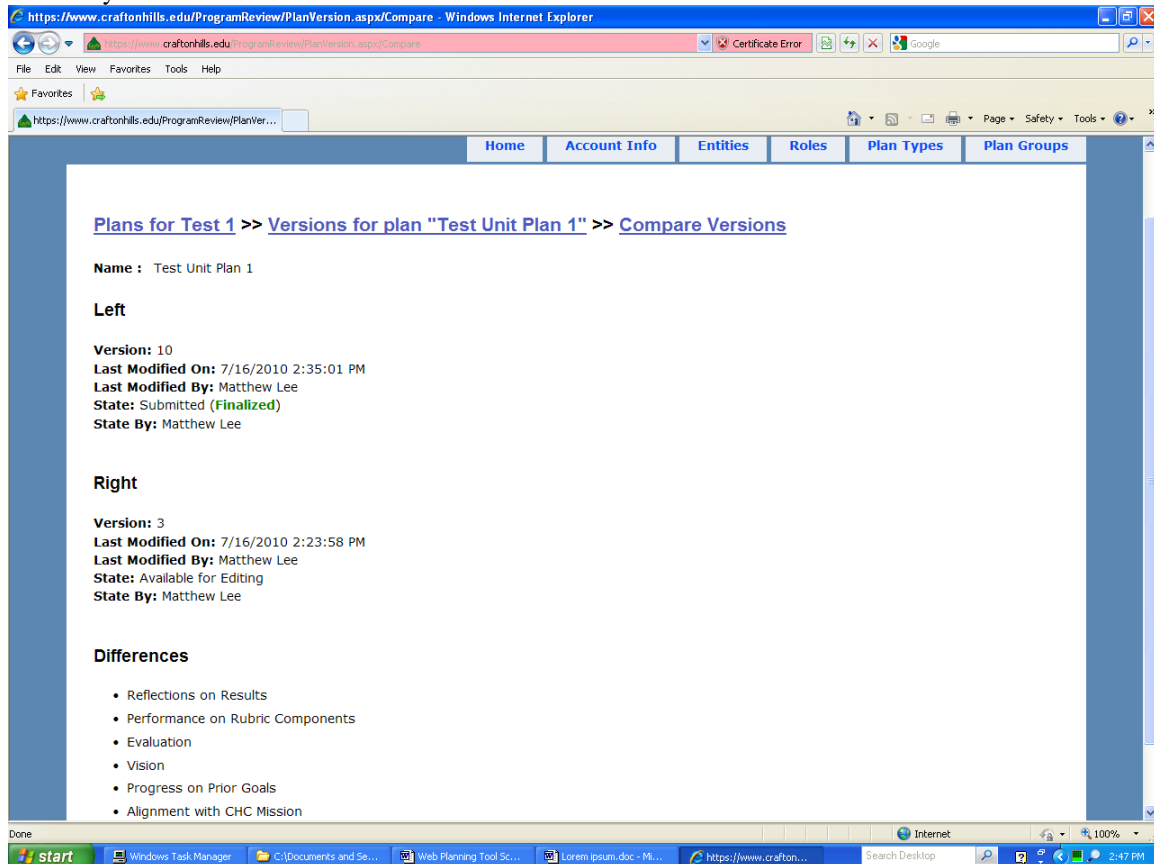
28. Here I have clicked on *View Objective Priority List* on Screen 8 so I can see my unit objectives in priority order. If I click on *Goal*, *Action/Activity*, or *Resource Requests*, a box will expand to show the associated information.
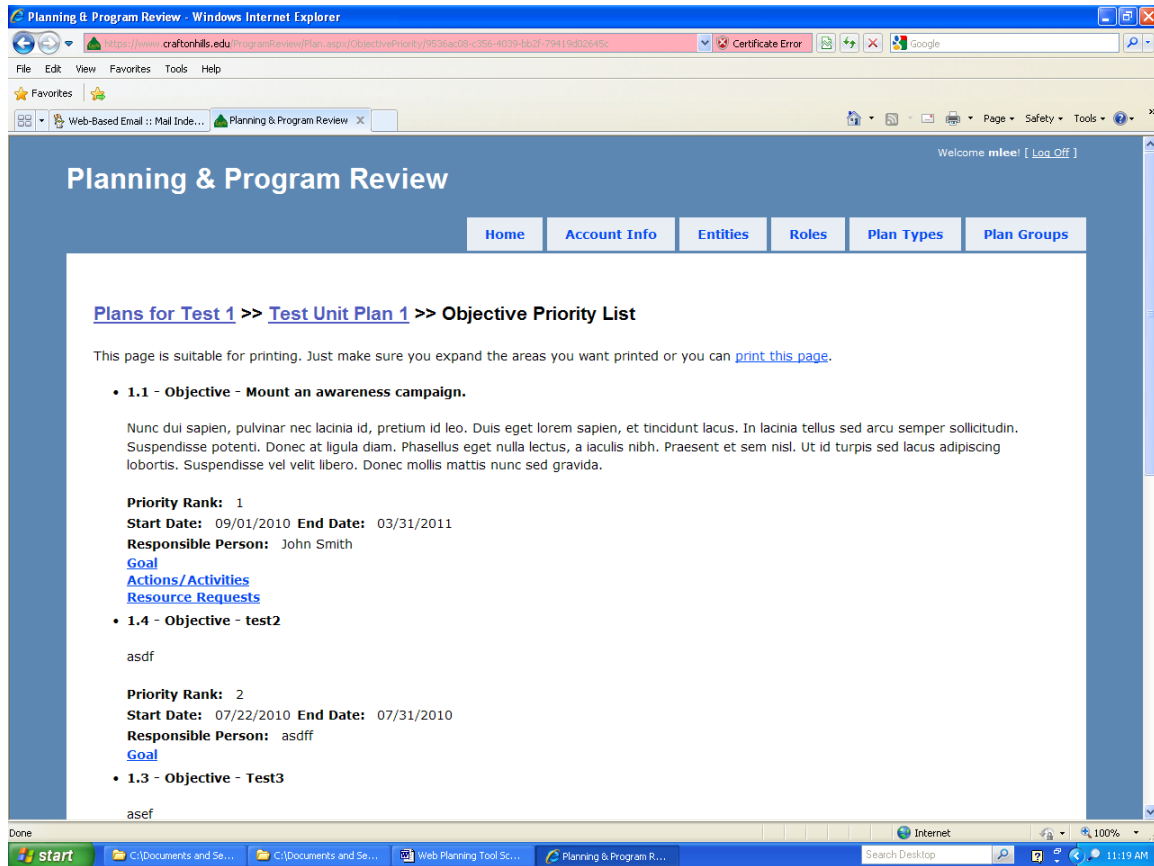
29. Here I have clicked on *Goal*. Clicking it again will make the box disappear to save screen space.

30. When the Division or Area manager is ready to provide feedback on a plan that has been submitted in draft or final form, he or she clicks on *Lock Plan for Comments* on Screen 23 or 24, which brings up the screen below.

31. Click on *Edit Your Comments*, and enter your feedback on the screen below. Be sure to click on <Save> when you are finished, and then click 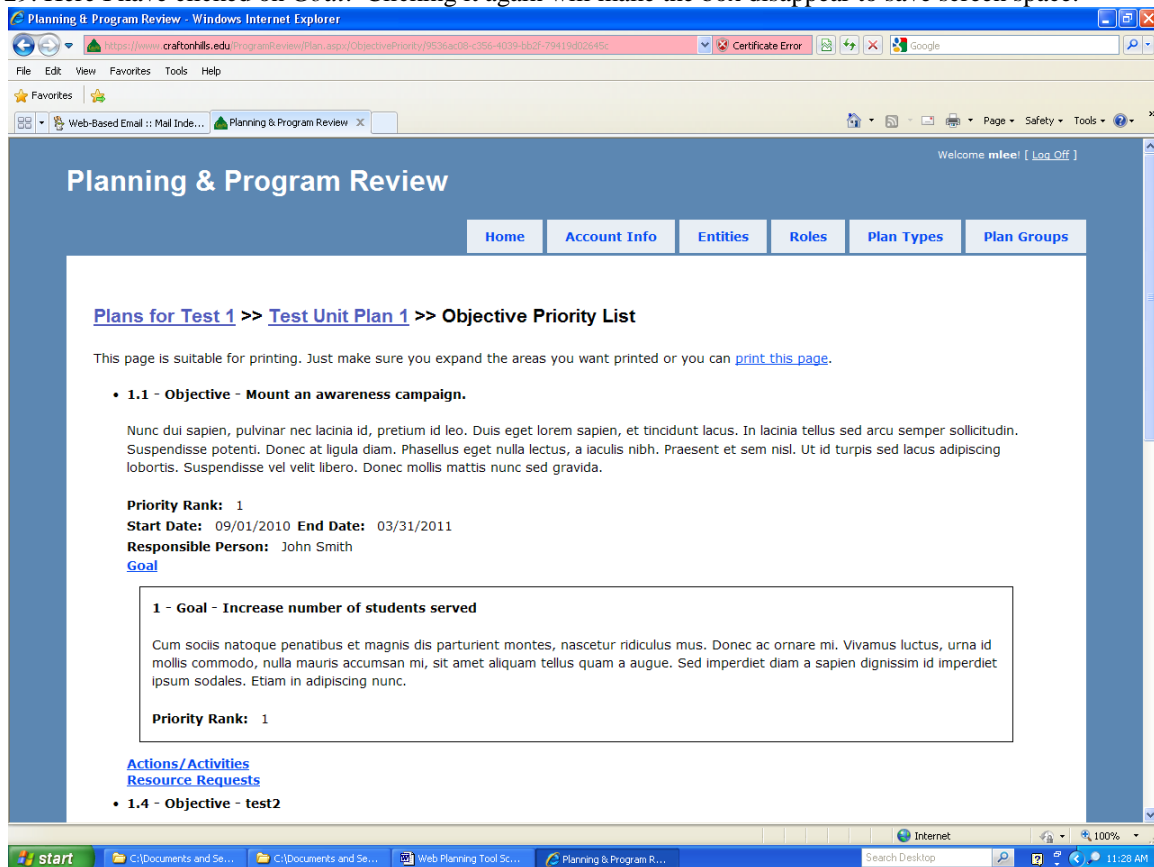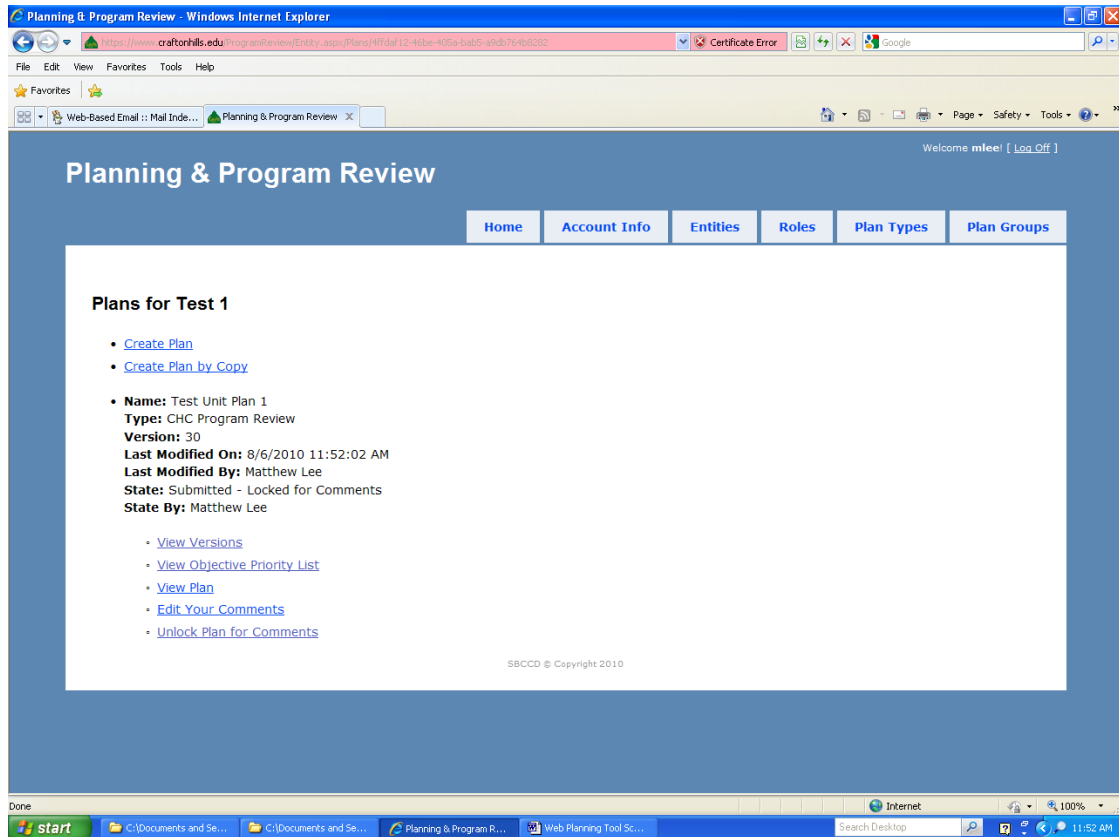on <Cancel> or the *Plans for ...* link (in this case, *Plans for Test 1*) to take you back to Screen 30. There, click on *Unlock Plans for Comments*, so the unit members will be able to view your feedback.

Note: See the *CHC Integrated Planning and Program Review Handbook* for details on the whole process.
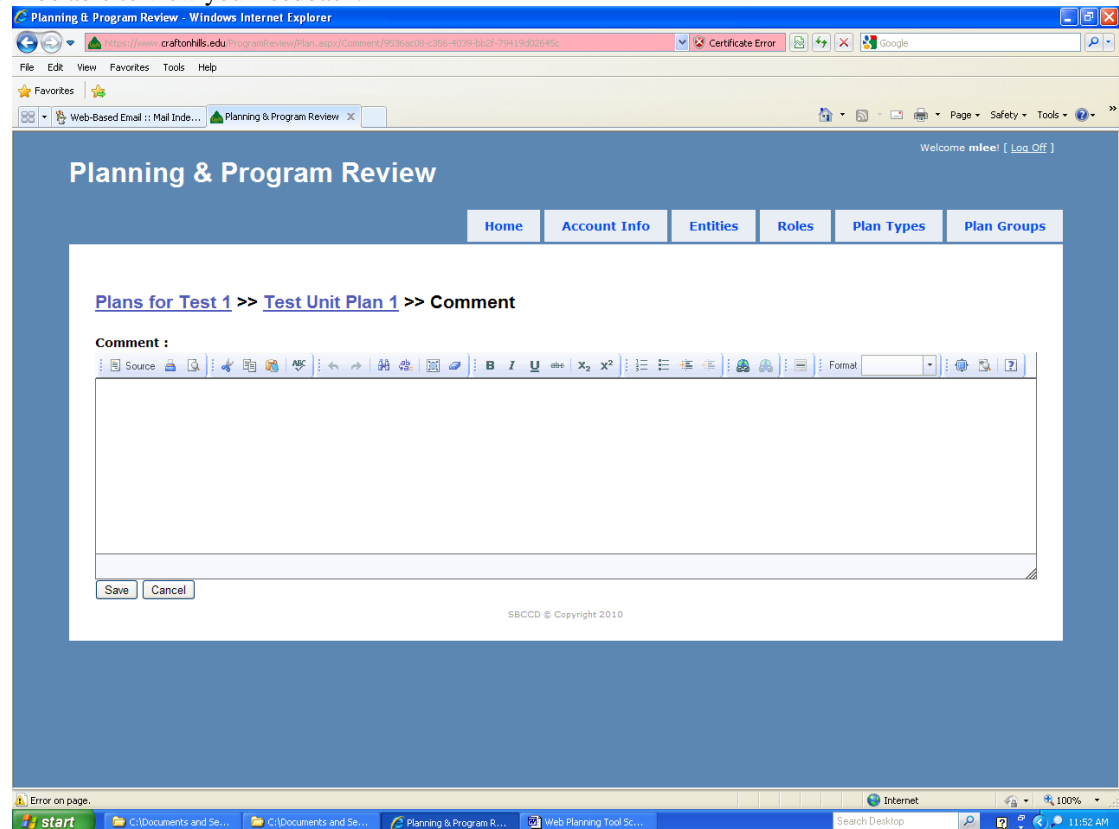
32. After all the units have submitted their finalized plans, the Division manager clicks the applicable Division name (in this case, "Test Parent") under Direct Management Entities on Screen 3, then *Create Plan* on the Division equivalent of Screen 4. That brings up this screen, which permits the roll-up of the goals, objectives, activities, and resource requests in multiple unit plans (the "children") into a single Division plan. That plan can then be edited as needed to set overall Division priorities. When all Divisions in an Area have submitted their finalized plans, the Area manager follows a corresponding process to roll up the goals, objectives, activities, and resource requests in multiple divisional plans into a single Area plan.