

Instructions for using the Online Unit Plan Form

DRAFT

A. General Information: Read before beginning to use the online unit plan form

The word “unit” means a department or area of the college. Instruction, Student Services, and Administrative Services all have units which write unit plans. Most units have either a department chair, a supervisor or a coordinator who writes the unit plan.

Start from the planning portal webpage page. This page lets you choose to view or work on plans. In the future, other types of plans besides unit plans, such as Program Plans, will also be reached from this page. You’ll be able to reach this page from home as well as on campus.

The online form looks a lot like the Excel form we used to use. The same parts of the unit plan are there (these were tabs on the Excel form):

- unit identification & basic information
- unit plan objectives and associated information such as prioritizations
- financial resource request information
- facilities resource request information
- IT resource request information
- Summary information for the Budget Committee.

There is a navigation bar at the top of the online unit plan. This allows you to go to different areas of the online unit plan. When you move the cursor over bar you will see small drop down lists; you can use these to “view” or “edit” sections of the online unit plan.

You can click on “view” to look at unit plans or “edit” to edit information. When you click on “view” you can see the unit plan objectives for the whole college. While you can see unit plan objectives from across the college you can only edit those associated with your unit. The online planning system is set up so that you can enter or edit the information that is associated with your job. For example, a department chair can enter/edit department objectives, department priorities, etc., while a division dean can enter division priorities.

In order to enter or edit information in the online unit plan you need to:

First go to the editing area of the section you are working on (you can use the yellow navigation bar to do this), then choose a specific objective to edit. To choose an objective to edit, click on the word “edit” next to the objective you want to edit.

Don’t forget to hit “Save” when you are done with each subsection!

The first time you work on it your unit plan will be blank - there will be no objectives or other information pre-populated in your unit plan. (In the future, your objectives from the previous year will already be there when you open the unit plan and you’ll be able to delete, edit, or add to them.)

Don’t use the back browser arrow to return to a part of the unit plan which you were working on before. Use the navigation bar at the top of the pages to move around in your planning work.

B. Detailed Instructions for entering information in the online unit plan:

Step 1: Follow the link provided to the SCC Online Planning Portal and choose to work on your unit plan.

On that page you will have the choice of working on your planning documents, viewing college plans, or viewing the planning analyses produced by PRIE.

- To work on your unit plan click on the “unit plan” link in the “work on my documents” section.
- You will be able to enter or edit the information associated with your job. For example, a department chair can enter/edit department objectives, department priorities, etc., while a division dean can enter division priorities.

Step 2: Enter some basic information about your unit on the “identification” page.

The first screen that comes up will ask you for some background information about your unit: the mission of the unit, the types of information that you use in planning, and the results of your review of that data for this planning year. There are two ways to enter or edit the information:

- If you are entering information for the first time on this page, you can do so clicking on “Create mission statement for.....” This will open all of the areas in this section for you to enter the information. *Don't forget to hit “Save” when you are done!*
- If you already have some information in the areas on this page, you can click on the word “edit” to edit the information in each of the areas in this section. *Don't forget to hit “Save” when you are done!*

Step 3: Add new objectives or edit the objectives you already wrote.

This is the first time we are entering information into the online unit planning system, so no objectives will be pre-populated into the unit plans. (In the future, your objectives from the previous year will be there when you open the unit plan and you'll be able to delete, edit, or add to them.). So, as far as the online system ‘knows’, you will be creating all new objectives for this year.

- From “Identification” page, click on “Add new objectives”; this will take you to the “Objectives” page.
- The first time you add an objective you use the insert tab to include the objective on your unit plan. After that you use the “edit” feature to change it.
- Type the information into the first row:
 - Enter the objective ID first...you can't save the row until you do that. It's important to note that the computer sorts numbers differently than you normally do. If you have more than 10 objectives this can make sorting interesting. For example, if PRIE had 12 unit objectives the computer would sort them as: PRIE 1, PRIE 11, PRIE 12, PRIE 2, PRIE 3, etc. So if you have more than 10 unit objectives then use the following format for the ID numbers: *MyUnit 01, MyUnit 02, MyUnit 03...MyUnit 10, MyUnit 11*, and so forth. “MyUnit” is standing in for whatever abbreviation you use for your unit in the unit plan).
 - There are text boxes for the objective ID, objective, and outcome measure.
 - There are drop down menus for the start and end year of the objective.
 - There are check boxes for resource requests, type of action, and college goals.
 - Don't enter the department priority yet; you'll do that after you have your objectives in place.

- Note: If you are the chair/supervisor of more than one unit, you'll need to use the drop-down menu under "Identification" to indicate which unit the objective is part of. (It's on the far right of the page...you may need to scroll over.)
- Click "Insert" to add the objective to your unit plan. *Don't forget to click "Insert" to add the objective.*
- After the objectives have been added to your unit plan enter the department priority for each objective. (Note: You can't put a priority in for an objective until after it's been inserted into the list of objectives.)

Step 4: Enter some details about the resources that you are requesting.

You can use the yellow navigation bar at the top of the page to go to the sections of the unit plan where information about resource requests can be viewed or entered.

- Hover over the type of resource request in the yellow navigation bar (e.g. "IT resource request") and then click on "edit" to add or change information in that area.
- Click on "edit" to work on the information for a given objective.
- Enter the information and click "Save"
- For Financial Resource requests enter the following:
 - Description
 - Rationale
 - Nature of Request (this is a drop down menu)
 - General Funding type (this is a drop down menu)
 - Specific Funding type (this is a drop down menu)
 - Hours or quantity
 - Cost per unit
 - Total financial need (hours or quantity x cost per unit)
 - Amount requested from budget committee.
 - Grand total project cost
- For Facilities Resource Requests and IT Resource requests enter the following:
 - Description
 - Rationale
- *Don't forget to hit "Save" when you are done!*

Other notes:

Some department chairs or supervisors may have more than one unit under them. Those folks will typically write more than one unit plan. For example, History and Political Science have the same department chair, but have separate unit plans.

If you have trouble finding or accessing online unit plan, call or email the PRIE Office 2511, or Kudinj@scc.losrios.edu.