

# Guide for Using the Updated Campus Labs Planning Tool: Completing Your 4-year Plan

## 1. How to Create Username and Password

- a. If you have already logged into Compliance Assist, you should still have a username and password for the new Campus Labs interface. The username should be your AUC email username. Use your AUC email credentials to login.
- b. If you do not have a login for the Campus Labs Planning Tool, please request one (*see contact information on back of sheet*), and we will grant you access.

## 2. How to Log in to the System

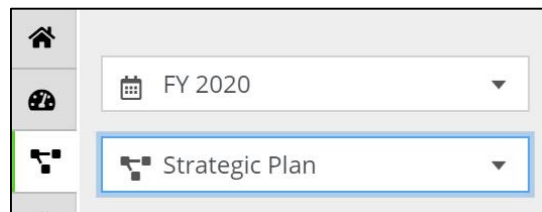
- a. Please go to <https://aucegypt.campuslabs.com/planning/auth/>
- b. Note that the old link (<https://aucegypt.compliance-assist.com/planning>) has a redirect and will work in the interim, although we recommend the new link for continued use.
- c. At the login screen, enter your username and password.

## 3. How to Locate your Department/Unit

- a. After logging in, you will be directed to the new user Dashboard
- b. From here click on the “Plans” icon located in the vertical toolbar on the left side of the screen



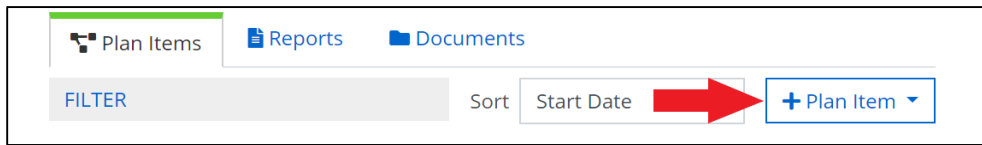
- c. From the “plans” page, make select “Strategic Plan” and choose the desired “Fiscal Year” as shown below.



- d. You will find the new tab, “My Units”, which contains the departments and/or areas you have access to as well as the institutional hierarchy. Simply click on the department under the “My Units” tab you wish to edit and you will see the current items already included within that department.
- e. You may use the “Filter” button at the top of the screen to view progress or filter by a strategic plan component (i.e. University Mission, Institutional Pillar, etc). For ease of use, the “Sort” button can also be used to organize documents according your needs.

#### 4. How to Add Your Strategic Plan

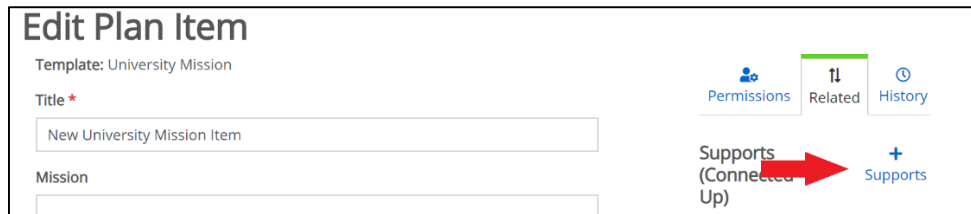
- a. Simply click on the “+ Plan Item” button located at the top of the screen. You will see a drop down menu with the different strategic planning and assessment components.



- b. Decide which item you would like to add, and then proceed to fill in the required fields. Typically, you will want to include a mission, an environmental scan, unit strategic goals, and objectives for every goal.

#### 5. How to Edit Your Strategic Plan

- a. If you wish to edit an item, click on the document that you wish to edit. You will immediately be taken to the editing window. From there, simply make the changes within the document and then press the “Done” button at the bottom of the screen when you are finished. You will be able to edit the files at any time, as well as see the most recent edits by accessing the “History” tab on the far right side of the screen.
- b. To link your document to the university level, navigate to the right side of the editing page screen and click on the “Related” tab located between “Permissions” and “History”. Then, press the “+ Supports” button. From there, use the hierarchy to link to the desired document.



#### 6. How to Create Reports

- a. To see your department report, click on the “Reports” tab at the top of your Strategic Plan homepage.
- b. Then click on “Unit Strategic Plan”; you will be taken to the “Unit Strategic Plan” report page
- c. Make sure to Specify Fiscal Years that you wish to look at by navigating to the “Start and End Date” section:
  - Select “Restrict results to specific dates”
  - Identify the start and the end date



- d. At the end of the “Unit Strategic Plan” report page, make sure to specify the format of the report (Word, Excel)



- e. To save your plan as a PDF, follow the below steps:

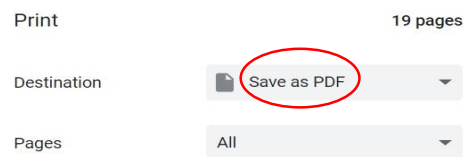
- Select “View Report”



- Once report is viewed, select “print”



- From the “print” settings, and under the “destination”, select “Save as PDF”



## 7. Software Support

- To learn more about the software, please consult <https://planningsupport.campuslabs.com/hc/en-us/articles/115015518308-Planning-Introduction-for-Users> and navigate to 7:10 within the video for information on the updated system.
- If you have any further questions please email [yousra\\_elnemr@aucegypt.edu](mailto:yousra_elnemr@aucegypt.edu)