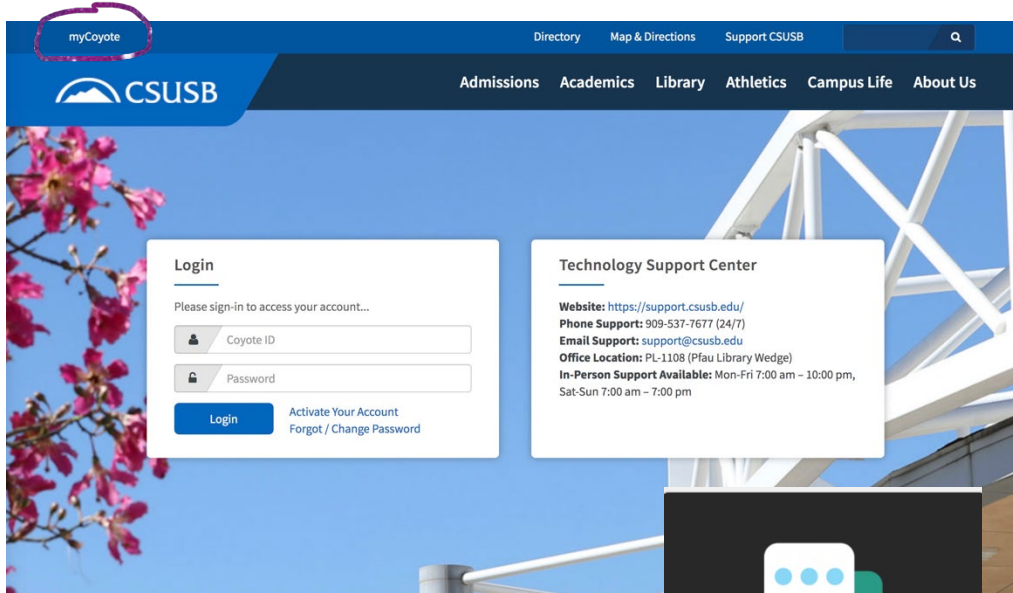**Campus Labs/Anthology**
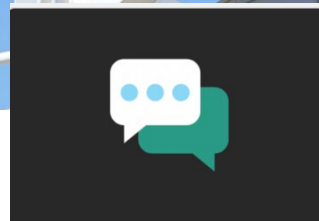**Planning User Training Module**
Please contact us at the Assessment Office if you need support
or have questions: assessmentoffice@csusb.edu

Logging into Planning

Log into **My Coyote**

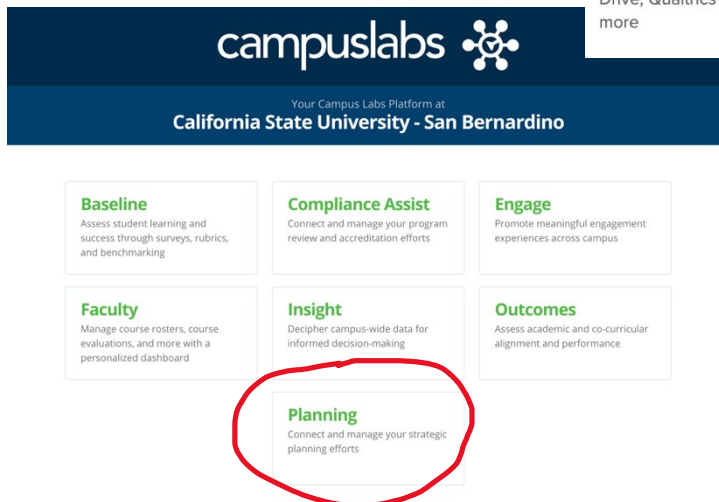Once in My Coyote, click on the **Collaborate** tile; then click on the **Campus Labs** tile

Finally, click on **Planning**

The Planning platform supports combining information and organizing efforts around all kinds of initiatives including strategic plans and annual reporting of outcomes and program effectiveness. In Planning, objectives can be linked to goals, vision statements, and to your mission. Action plans, outcomes achievement data, and assessments can be aligned to provide evidence of progress to inform planning, accreditation, and program review processes. The modules below require specific user access. Please contact your supervisor, department head, or assessment coordinator if you require access to Planning. If you are not sure who to contact, please send a message to the Assessment Office in the Division of Academic Affairs at assessmentoffice@csusb.edu.

Introduction & Overview
This training will provide a broad overview of how to navigate the Planning tool, in addition to providing examples of how the tool enables campuses to take strategic or annual planning and reporting efforts online.

Topic	Resource
Planning Overview	Video

Follow-up: Log into Planning. Navigate any organizational units to which you may have access and become familiar with the platform.

Using Planning
This training will provide an overview of how to navigate through the Planning tool and contribute to plans. It will cover the user dashboard and how to create, edit and review content for the unit(s). *You must have permission at the Administrative level for your unit in Planning from your site administrator for this training module.*

Topic	Resource
Plan Item Sort and Filter Options	Article
Adding a Plan Item	Article
Assigning Item Responsibility	Article, Video
Plan Item Read View	Article
Sharing a Plan Item	Article
Related Items	Article

Follow-up: Log into Planning. Sort and filter your Plan items in the dashboard to see different options, then sort and filter items in your organizational unit. Add, edit and move a plan item if you have access to all these actions. Then use the delete button on the item to delete it when you are finished. Make a site administrator responsible for an item. Follow the steps to relate an item if you have access and then break the relationship. Share a Plan item with a site administrator.

Documents & File Management

This training will provide guidance on using the Documents tab for document storage in Planning. *You must have permission for Documents in Planning from your site administrator for this training module.*

Topic	Resource
Item File Storage	Article
Unit Documents	Article

Follow-up: Add a folder and some files to Documents for your unit.

Custom Reporting

This training will walk you through all of the steps from creating a report to sharing a report. *You must have permission for Reports in Planning from your site administrator for this training module.*

Topic	Resource
Planning Report Creation	Video
Reporting Permissions	Article
Creating a Report Definition	Article
Sharing a Report Definition	Article
Generating a Report	Article
Report Filters	Article
Sharing a Report	Article
Saving a Report as a PDF	Article
Saving a Report as a CSV	Article

Follow-up: You know the drill! Create, generate, and share a report with your site administrator!

Planning Unit Administrator

This training is for those who are designated as the Planning Unit Administrator for their unit or sub-unit.

Topic	Resource
Understanding User Permissions	Article
Reporting Permissions	Article

Follow-up: Navigate to the Settings area in Planning. For your unit, search for a user and go in and view their Permissions.