



HELP GUIDE – HOW TO PRINT A REPORT IN DIAMOND

This Help Guide will walk you through how to print a report of your Three-Year plan, Program Review, and New Resource (Budget) Request in Diamond. If you have any questions, please email planning@otc.edu.

STEP 1 – LOGIN TO DIAMOND

- The website is otcc.strategicplanningonline.com
- Your username and password are the same as your OTC username and password.

STEP 2 – SELECT THE “2025-2026 (Current)” PLANNING YEAR

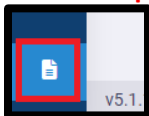
- In the upper right corner, ensure the **Planning Year** is **2025-2026**.



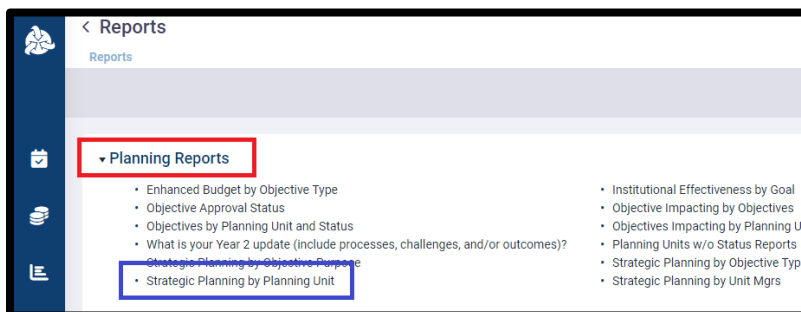
THREE-YEAR PLAN REPORT

Full disclosure – these reports are easy to run, but not the best in terms of formatting. However, they will provide you with the option to print what you have entered to review on paper. For the final report given to the Peer Reviewers and Cabinet, we will format the reports so they look a bit nicer!

- A. Click on **Report Icon** on the left menu (at the very bottom of the screen!).

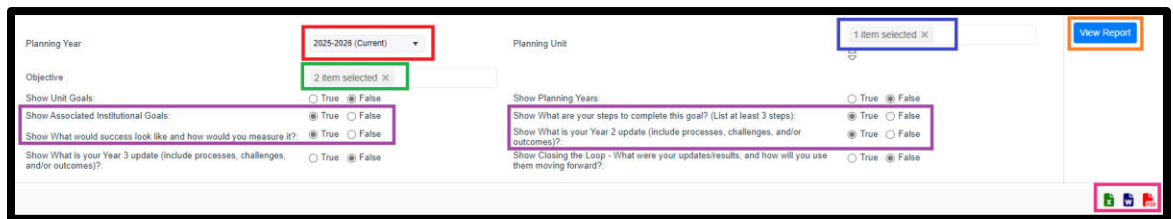


- B. Under **Planning Reports**, click on **Strategic Planning by Planning Unit**.

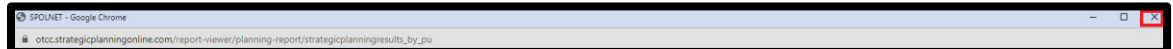


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- C. The report settings screen will appear.
1. Make sure **2025-2026 (Current)** is selected for the planning year.
 2. Choose your program/department under **Planning Units**.
 3. Select which Objective (aka Goals) you would like to print a report for.
 4. Optional – you can **Include/Exclude** specific items on the report. If you don't mind having extra information we aren't using, leave everything as "Include". If you only want the items that will be on the final report, **only keep the following** marked as "Include"
 - i. Show Associated Institutional Goals
 - ii. Show What would success look like and how would you measure it?
 - iii. Show What are your steps to complete this goal? (List at least 3 steps)
 - iv. Show What is your Year 2 update (include processes, challenges, and/or outcomes)?
 5. Click **View Report**.
 6. The report will appear below. Click on the **"X"** to download as Excel, **"W"** to download as a Word document or the **"PDF"** to download as a PDF.



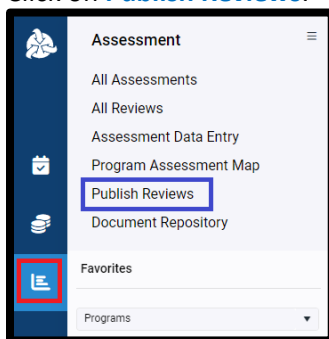
7. Click the **X** in the upper right to close the report and return to Diamond when you are finished.



PROGRAM REVIEW REPORT

This report is also easy to run, and the text you see under the Response will appear on the final report. We will do some overall formatting updates on the final report given to the Peer Reviewers and Cabinet so they look a bit nicer!

- A. Click on **Assessment Icon** on the left menu.
- B. Click on **Publish Reviews**.

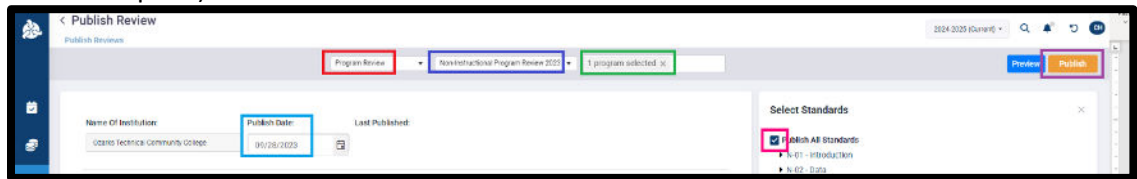


- C. The Publish Review screen will appear.

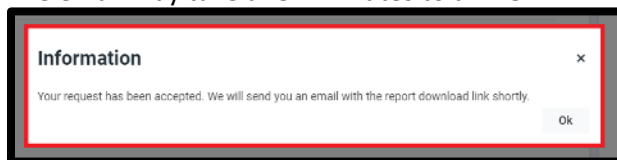


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1. Choose **Program Review** from the first drop-down box.
2. Choose **Non-Instructional Program Review 2023** or **Instructional Program Review** (whichever category your program/department falls under) from the second drop-down box.
3. Choose your **Program/Department** from the third box.
4. Change the **Publish Date** to today's date.
5. Check box **Publish All Standards**.
6. Leave all other options as is.
7. Click on **Publish** (it is ok to choose this – it doesn't send any emails or mean you are submitting the final report!).



8. You will **receive a notice** confirming that your request has been accepted, and you will receive an email.
9. The email may take a few minutes to arrive.



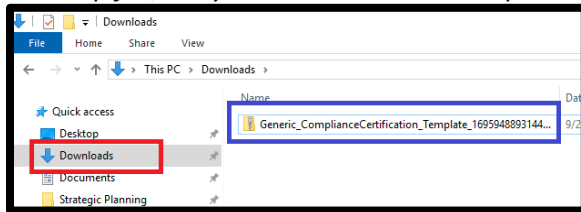


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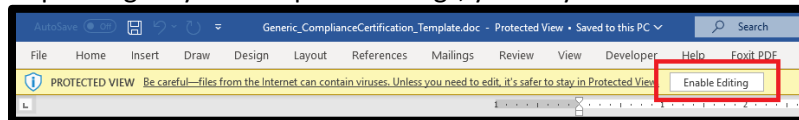
10. In the email you receive, **click on the link** to save the report attachment.
The attachment will likely save in your “Downloads” folder.



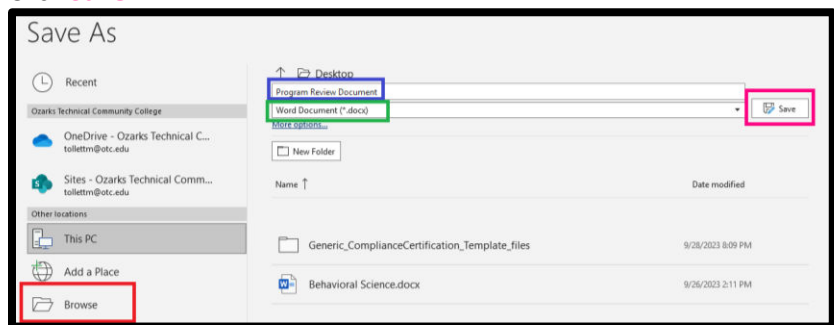
11. Go to your **Downloads** folder (or wherever the link saved the report).
12. Double-click on the file that was downloaded
It is a zip file, but you can double-click to open it like a standard folder.



13. In the folder:
- Open the Word document titled “**Generic_CompilanceCertification_Template.doc**”
 - Your Program Review questions and responses will be in the document.
 - Depending on your computer settings, you may need to click **Enable Editing**.



- I would also go to “File – Save As” to save the document somewhere where you can locate it.
 - Click **Browse** to change where the file will be saved.
 - Rename the file** to something you’ll remember.
 - Choose Word Document (*.docx) from the **drop-down menu** under the file name.
 - Click **Save**.





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- e. The formatting is not great unfortunately, but it will help you review your responses. If you need to edit any of the text in Diamond, refer back to the “How to Add Your Program Review to Diamond” Help Guide.