

HOW TO ADD YOUR THREE-YEAR PLAN TO DIAMOND

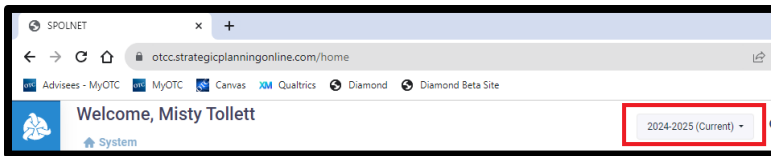
This Help Guide will walk you through how to add your three-year plan to Diamond. If you have any questions, please email planning@otc.edu.

STEP 1 – LOGIN TO DIAMOND

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

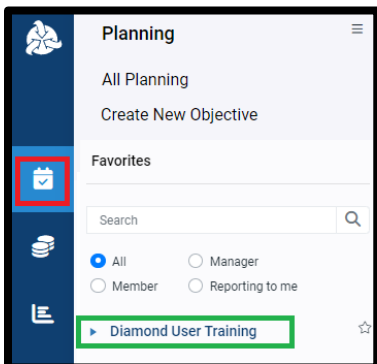
STEP 2 – SELECT THE “2024-2025 (Current)” PLANNING YEAR

- In the upper right, ensure the **Planning Year** is **2024-2025 (Current)**.

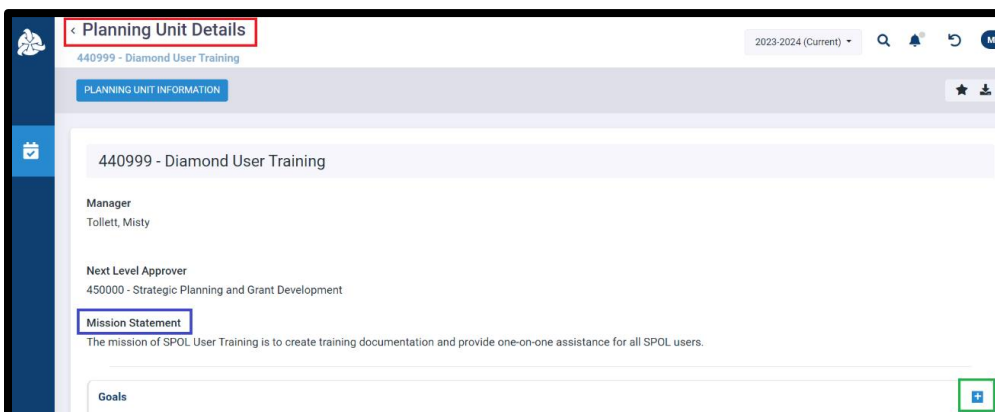


STEP 3 – ENTER YOUR GOAL INFORMATION

- A. Click on **Planning Icon** on the left menu.
- B. Click on your **Program/Department** name.



- C. The **Planning Unit Details** screen will appear.
*If you need to update your **Mission Statement**, please email planning@otc.edu.*
- D. Hover over the Goals heading.
- E. Click on the **Add** icon (a blue plus sign) that appeared on the far-right side of Goals.



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- F. The **Goal Information – What do you want to accomplish?** screen will open:
1. Enter a title for your goal under **Goal Title**.
 2. Leave your respective program/department selected under **Planning Unit**.
 3. Leave **Leave Unchecked** unchecked.
 4. Leave the **Planning Year** as *2024-2025 (Current)*.
 5. Select the **Goal Purpose** that best fits your goal.
 6. Choose *In Progress* for your **Goal Status**.
 7. Enter a description of what you would like to accomplish under **Goal Description**.
 8. Click **Save** when complete.

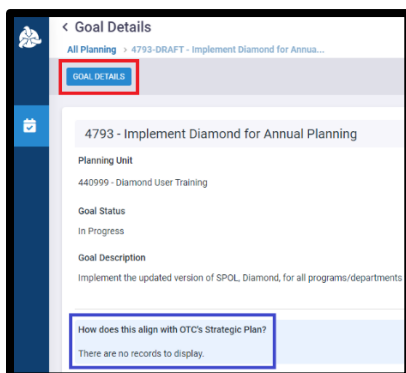
The screenshot shows a form titled "Goal Information - What do you want to accomplish?". The form has several sections: "Goal Title" with the text "Implement Diamond for Integrated Planning"; "Planning Unit" with a dropdown menu showing "440999 - Diamond User Training -- Tollett, Misty"; "Leave Unchecked" with an unchecked checkbox; "Planning Year" with a dropdown menu showing "2024-2025 (Current)"; "Goal Purpose" with a dropdown menu showing "Departmental Planning"; "Goal Status" with a dropdown menu showing "In Progress"; and "Goal Description" with a text area containing "Implement Diamond for all programs/departments who complete Integrated Plans." At the bottom right, there are "Cancel" and "Save" buttons.

- G. The **Goal Details** screen will open after you click Save.



STEP 4 – ALIGN YOUR GOAL TO OTC’S STRATEGIC PLAN

- A. On the **Goal Details** screen, click on **How does this align with OTC’s Strategic Plan?**



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- B. The **How does this align with OTC's Strategic Plan** screen will open on the right.
1. Click the **circle** next to the primary strategy your goal most closely aligns to.
It will automatically add the checkbox under Select as well.
 2. You may **check** any additional initiatives if desired.
 3. Click **Save** when your selections are complete.

Primary	Select	Commitment	Strategy
<input type="checkbox"/>	<input type="checkbox"/>	Institutional Excellence	Academic Excellence
<input type="checkbox"/>	<input type="checkbox"/>	Institutional Excellence	Innovation
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Institutional Excellence	Operational Excellence
<input type="checkbox"/>	<input type="checkbox"/>	Student Success	Accessibility
<input type="checkbox"/>	<input type="checkbox"/>	Student Success	Student Engagement
<input type="checkbox"/>	<input type="checkbox"/>	Student Success	Student Supports
<input type="checkbox"/>	<input type="checkbox"/>	Local Communities	Career Pipeline
<input type="checkbox"/>	<input type="checkbox"/>	Local Communities	Community Engagement
<input type="checkbox"/>	<input type="checkbox"/>	Local Communities	Workforce Development

- C. The **Strategic Plan Strategy (or Strategies)** you selected will appear on the Goal Details screen.

How does this align with OTC's Strategic Plan?
Dream.Plan.Build. Strategic Plan 2023-2028


- Institutional Excellence - Operational Excellence
- Institutional Excellence - Innovation

STEP 5 – ENTER HOW YOU WILL COMPLETE THE GOAL

- A. Scroll down and hover over the **What are your steps to complete this goal?** heading.
*The line will turn blue and the **add icon** (a blue plus sign) will appear on the right side.*
- B. Click the **Add** icon.

How does this align with OTC's Strategic Plan?
Dream.Plan.Build. Strategic Plan 2023-2028

- Institutional Excellence - Operational Excellence
- Institutional Excellence - Innovation

What are your steps to complete this goal? (List at least 3 steps) 

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- C. The **Step Details** entry screen will open on the right.
1. Enter the **Anticipated Start Date**.
 2. Enter the **Anticipated Completion Date**.
 3. Choose the **Planning Request Year** this step will occur in.
 - i. Example, if your start date is 7/1/2024, you will select 2024-2025 for this step.
 4. Choose your desired **Priority Level**.
 5. Choose your desired **Step Status**.
 6. The **Actual Completed Date** is optional and will be updated at a later date.
 7. Enter one of the steps you plan to do under **How will you complete this step?**
 8. Click **Save** when complete.
You may have to scroll down to see the save button depending on your screen size.

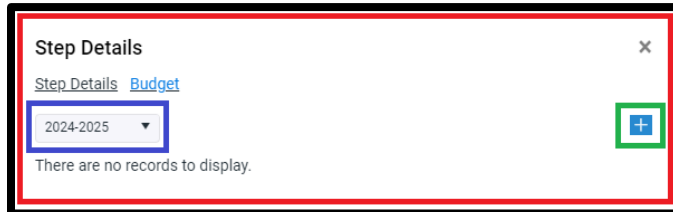
- D. Your first step has been entered and **will appear** on the Goal Details screen.
- E. If you need to add a **New Resource (Budget) Request** to this step, follow the instructions listed under Step 6 below. Otherwise, repeat steps 5A – 5D to enter your remaining steps to complete this goal and move to Step 7 when complete.

Anticipated Start Date	Anticipated Completion Date	Planning Request Year	Priority Level	Step Status	Budget Request	Approved
07/01/2024	06/30/2026	2024-2025	High	In Progress	\$0.00	\$0.00

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STEP 6 – ADD ANY NEW RESOURCE (BUDGET) REQUESTS FOR THE GOAL (OPTIONAL)

- A. Click on the step you would like to add your New Resource (Budget) Request to open it. The **Step Details** entry screen will open on the right.
1. The only date option will be **2024-2025**. It is ok to leave it as this, even if your resource request will be for a future year.
 2. Click on the **add icon** (a blue plus sign).



Step Details

Step Details Budget

2024-2025

There are no records to display.

- B. The **New Resource Request** screen will appear.
1. Select the **Budget Account** and **GL Code** for your request and click **Next**.



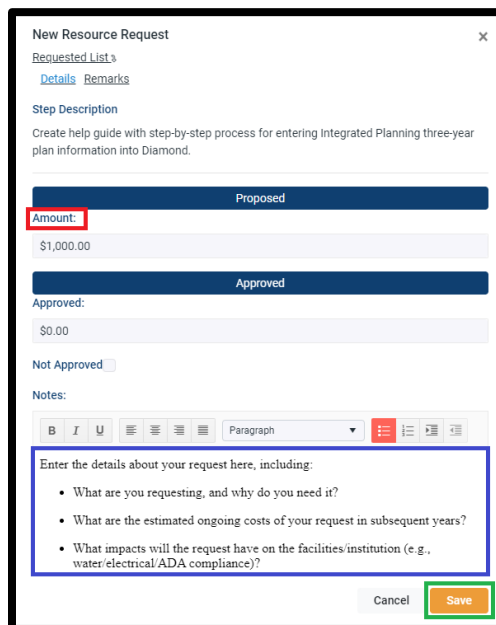
New Resource Request

Budget Account: 10-614000-00 - STRATEGIC PLANNING

GL Code: 00003 - New One-Time Request

Cancel Next

2. A screen will appear where you will include some additional details about your request.
 - i. Enter the **amount** of your request.
 - ii. Enter the details of your request in the **Notes** area.
 - iii. Click **Save** when complete.



New Resource Request

Requested List

Details Remarks

Step Description

Create help guide with step-by-step process for entering Integrated Planning three-year plan information into Diamond.

Proposed

Amount: \$1,000.00

Approved

Approved: \$0.00

Not Approved

Notes:

Enter the details about your request here, including:

- What are you requesting, and why do you need it?
- What are the estimated ongoing costs of your request in subsequent years?
- What impacts will the request have on the facilities/institution (e.g., water/electrical/ADA compliance)?

Cancel Save

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- C. Your **completed request** will appear on the screen. You may click the **X** in the upper right to return to the Goal Details screen.

- D. If you have additional resource requests to add, follow steps A-C. Otherwise, move back to Step 5 to enter your next Step or move on to Step 7 below.

STEP 7 – SELECT ANY PROGRAMS/DEPARTMENTS YOU NEED ASSISTANCE FROM FOR THE GOAL (OPTIONAL)

- A. Scroll down and hover over the **What other programs/departments do you need assistance from?** heading.

*The line will turn blue and the **add icon** (a blue plus sign) will appear on the right side.*

- B. Click the **Add** icon.

- C. The **What other programs/departments do you need assistance from?** screen will open on the right.

1. **Check** any areas you need direct assistance from to complete your goal.

You do not need to select your own program/department.

2. Click **Save** when your selections are complete.

You may have to scroll down to see the save button depending on your screen size.

Anticipated Start Date	Anticipated Completion Date	Planning Request Year	Priority Level	Step Status	Budget Request	Approved
07/01/2024	06/30/2026	2024-2025	High	In Progress	\$1,000.00	\$0.00

Select	Planning Units
<input type="checkbox"/>	Academic Affairs
<input type="checkbox"/>	Academic Support
<input type="checkbox"/>	Academic Support - Richwood Valley Campus
<input type="checkbox"/>	Academic Support - Table Rock Campus
<input checked="" type="checkbox"/>	Accreditation and Assessment
<input type="checkbox"/>	Administrative Services
<input type="checkbox"/>	Administrative Services Administrative Assistant
<input type="checkbox"/>	Admissions and Recruitment
<input type="checkbox"/>	Adult Education and Literacy
<input type="checkbox"/>	Agriculture

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F. The programs/departments you selected **will appear** on the Goal Details screen.

Anticipated Start Date	Anticipated Completion Date	Planning Request Year	Priority Level	Step Status	Budget Request	Approved
07/01/2024	06/30/2026	2024-2025	High	In Progress	\$1,000.00	\$0.00

What other programs/departments do you need assistance from?	
09/2/2023	260100 - Accreditation and Assessment

STEP 8 – ENTER WHAT SUCCESS WOULD LOOK LIKE AND HOW YOU WILL MEASURE IT

- Scroll down and find “**What would success look like and how would you measure it?**”
- Hover over the “**What would success look like...**” heading.
*The line will turn blue and the **add icon** (a blue plus sign) will appear on the right side.*
- Click the **Add** icon.

What other programs/departments do you need assistance from?

Date	Program/Department	Assistance From
01/04/2023	260000 - Academic Support	Weaver, Megan

What would success look like and how would you measure it? +

There are no records to display.

- The “**What would success look like...**” entry screen will open on the right.
 - You may leave the **Date** as the current date, or change if you would like.
 - Leave the **Planning Year** as **2024-2025**.
 - Under **Description**, enter your “What would success look like...” information.
 - Click **Save**.
You may have to scroll down to see the save button depending on your screen size.

GOAL DETAILS

Institutional Excellence - Innovation

What are your steps to complete this goal? (List at least 3 steps)

Create help guide with step-by-step process for entering Integrated Planning three-year plan information into Diamond.

Anticipated Start Date	Anticipated Completion Date	Planning Request Year	Priority Level	Step Status	Budget Request	Approved
07/01/2024	06/30/2026	2024-2025	High	In Progress	\$1,000.00	\$0.00

What other programs/departments do you need assistance from?

Date	Program/Department	Assistance From
09/28/2023	260100 - Accreditation and Assessment	Wheeler, Marcia

What would success look like and how would you measure it?

Date: 9/1/2023

Planning Year: 2024-2025 - (Current)

Description:

Implementation will be successful if 100% of programs/departments are able to enter their three-year plan in Diamond with the assistance of the Help Guides or through professional development sessions.

Cancel Save

Your goal has now been entered.

Repeat Steps 3-8 to enter each additional goal.

Note – in the past we had you submit the goal for approval. You will not do that at this point.

You will submit the goals after your Peer Review meeting.