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 "2024-2025 (Current)" PLANNING YEAR

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



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 at 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.



- C. The report settings screen will appear.
 - 1. Make sure **2024-2025 (Current)** is selected for the planning year.
 - 2. Choose your program/department under Planning Units.
 - 3. 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. Mission Statement
 - ii. How does this align with OTC's Strategic Plan
 - iii. Step Description
 - iv. What other programs/departments do you need assistance from?
 - v. What would success look like and how would you measure it?
 - 4. Click View Report.
 - 5. The report will appear below. Click on the "W" to download as a Word document or the "PDF" to download as a PDF.

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



NEW RESOURCE (BUDGET) REQUEST REPORT

Unfortunately, your new resource (budget) request does not appear on the three-year plan report you ran above yet. However, here is a report you can run to review the information. For the final report given to the Peer Reviewers and Cabinet, we will include it with the three-year plan with nicer formatting!

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



B. Under Budget Reports, click on Enhanced Budget with Objective and Task Detail.

Reports		
Reports		
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Enhanced Budget by Objective Type Objective Approval Status Objectives by Planning Unit and Status Winki sour Year 2 update (include processes, challenges, and/or outcomes)? Strategic Planning by Objective Purpose Strategic Planning by Planning Unit	Institutional Effectiveness by Goal Objectives Objectives impacting by Objectives Objectives impacting by Planning Unit Planning Unit w/ Satatus Reports Strategic Planning by Objective Type Strategic Planning by Unit Mgrs	Institutional Effectiveness by Planning Unit Objective Summary by Institutional Goal Planning Unit History Strategic Planning by Institutional Goal Strategic Planning by Planning Priorities Step Details
Budget Reports Budget Detail and Forecast	Budget Detail by Account	Budget Forecast by Type
 Budget Forecast by Unit Manager 	Budget Manager	 Description of Request
Budget Summary by Manager	Enhanced Budget by (Account	 Enhanced Budget by GL Code
Enhanced Budget Summary by Institutional Goal GL Code Summary	Enhanced Budget with Objective and Task Detail summary by Function and Class	 GL Code by Account

- C. The report settings screen will appear.
 - 1. Make sure **2024-2025 (Current)** is selected for the planning year.
 - 2. Select your name under Select Budget Manager.
 - 3. Select your accounts under Selected Budget Accounts.
 - 4. Click View Report.
 - 5. The report will appear below. Click on the "W" to download as a Word document or the "PDF" to download as a PDF.
 - i. The **GL Code**, **Description**, and **Amount** are the items you want to review on this report.
 - ii. If you need to make edits, you will do that in your Three-Year Plan. Refer to the "How to Enter Your Three-Year Plan to Diamond" Help Guide, Step 6.

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	Account Name: STRATEGIC PL	ANNING	Planning Unit: Strategie Development	: Planning and Gr	ant	Planning Year: 2	2024-2025		
	GL Code	Description	Qty	Requested Cost	Amount	Goal Title	How will you complete this step?		
	00001 - New Capital Request	This is the area I would like to show on the report.	0	(\$0)	\$1	Test Gost 052820234	Test		
	00003 - New One-Time Request	Effect the details about your recuts the including: What are you recueding, and why ob you need if What are the estimated ongoing costs if your request in tubercent . What is in the estimated the index will the request have on the hootselination (e.g., waterreechail/CA complement).	0	(\$0)	81.000	Implement Diamond for Integrated Planning	Create help guide with tasp-by-step process for entering these year plan information into Diamond.		
	Total for 10-614	000-00 STRATEGIC PLANNING			\$1,001.00			6	

6. 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 at bit nicer!

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



- C. The Publish Review screen will appear.
 - 1. Choose **Program Review** from the first drop-down box.
 - Choose Non-Instructional 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!).

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	Program Review • Non-Netfunctional Program Review 2020 • 1 program selected ×	Preview Publish	<u>ן</u>
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9	Coarts Technical Community College (94/28/2023)		

- 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.

Information	×
Your request has been accepted. We will send you an email with the report download link shortly.	
	Ok

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.
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- 13. In the folder:
 - i. Open the Word document titled "Generic_ComplianceCertification_Template.doc"
 - ii. Your Program Review questions and responses will be in the document.
 - 1. Depending on your computer settings, you may need to click Enable Editing.



- 2. I would also go to "File Save As" to save the document somewhere where you can locate it.
 - a. Click Browse to change where the file will be saved.
 - b. Rename the file to something you'll remember.
 - c. Choose Word Document (*.docx) from the **drop-down menu** under the file name.
 - d. Click Save.

Save As		
L Recent	↑ 🗁 Desktop Program Review Document	
Ozarks Technical Community College	Word Document (*.docx)	✓ Save
OneDrive - Ozarks Technical C tollettm@otc.edu	More sptions	
Sites - Ozarks Technical Comm tollettm@otc.edu	Name 1	Date modified
Other locations		
This PC	Generic_ComplianceCertification_Template_files	9/28/2023 8:09 PM
Add a Place	Behavioral Science.docx	9/26/2023 2:11 PM
Browse		

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.