

HOW TO PRINT A REPORT IN DIAMOND

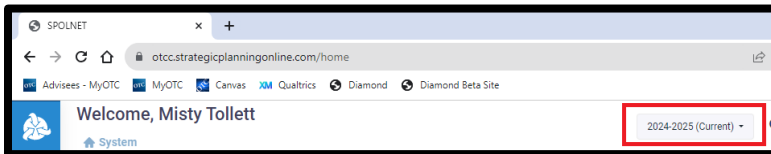
This Help Guide will walk you through how to print a report of your Three-Year plan, Program Review, and New Resource (Budget) Request in Diamond. If you have any questions, please email planning@otc.edu.

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 “2024-2025 (Current)” PLANNING YEAR

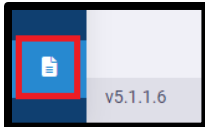
- In the upper right, ensure the **Planning Year** is **2024-2025 (Current)**.



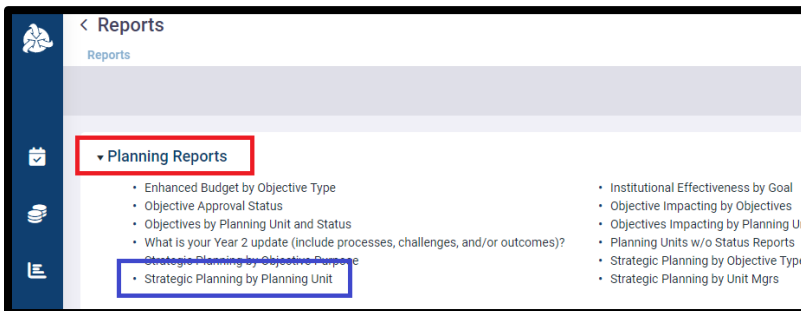
THREE-YEAR PLAN REPORT

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 a bit nicer!

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

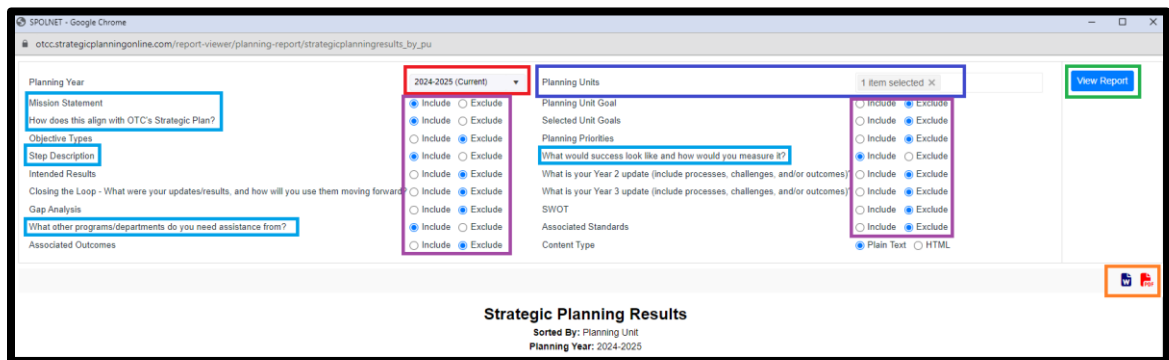


- B. Under **Planning Reports**, click on **Strategic Planning by Planning Unit**.

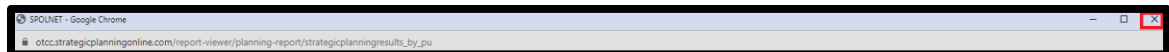


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- C. The report settings screen will appear.
1. Make sure **2024-2025 (Current)** is selected for the planning year.
 2. Choose your program/department under **Planning Units**.
 3. Optional – you can **Include/Exclude** specific items on the report. 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.



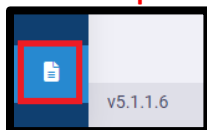
6. Click the **X** in the upper right to close the report and return to Diamond when you are finished.



NEW RESOURCE (BUDGET) REQUEST REPORT

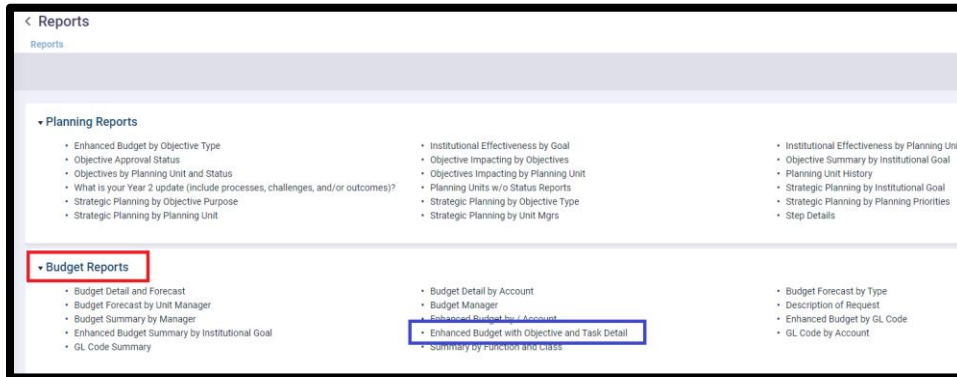
Unfortunately, your new resource (budget) request does not appear on the three-year plan report you ran above yet. However, here is a report you can run to review the information. For the final report given to the Peer Reviewers and Cabinet, we will include it with the three-year plan with nicer formatting!

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



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



- 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 Code Three-Year Plan to Diamond” Help Guide, Step 6.

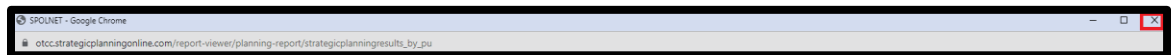
Enhanced Budget with Objective and Task Detail

Budget Account #: 10-614600-00 Planning Unit Code: 450000 Manager: Holden, Celia

Account Name: STRATEGIC PLANNING Planning Unit: Strategic Planning and Grant Development Planning Year: 2024-2025

GL Code	Description	Qty	Cost	Amount	Goal Title	How will you complete this step?
00001 - New Capital Request	This is the area (scroll line to enter the report)	0	(0)	\$1	Test One: 0820222A - Test	
00002 - New One-Time Request	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 - justification? • What impacts will the request have on the budget position (e.g. will it increase/ decrease compliance)?	0	(0)	\$1,000	Implement Diamond	Create help guide with step-by-step process for entering Integrated Planning Three-Year Plan information into Diamond.
Total for 10-614600-00 STRATEGIC PLANNING				\$1,001.00		

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

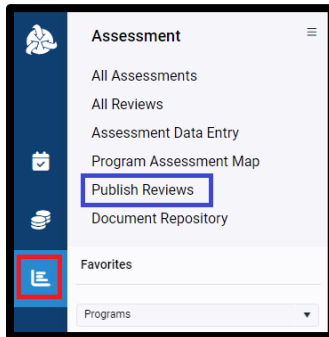


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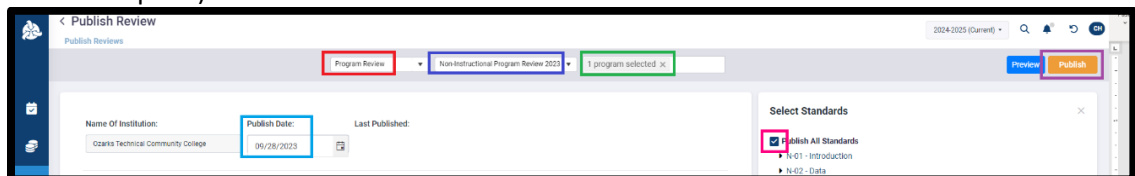
PROGRAM REVIEW REPORT

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!

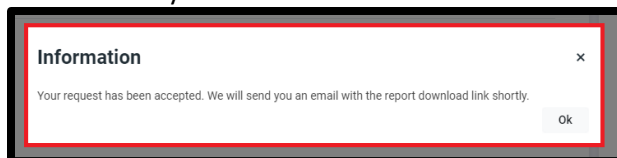
- A. Click on **Assessment Icon** on the left menu.
- B. Click on **Publish Reviews**.



- C. The Publish Review screen will appear.
 1. Choose **Program Review** from the first drop-down box.
 2. 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!).



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.

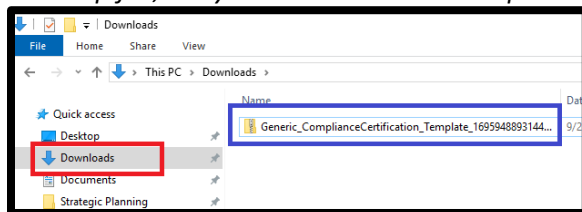


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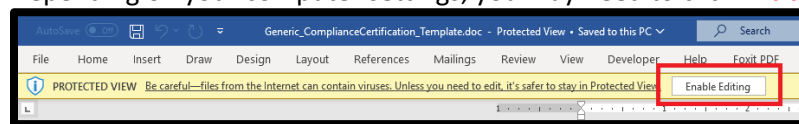
10. In the email you receive, **click on the link** to save the report attachment.
The attachment will likely save in your “Downloads” folder.



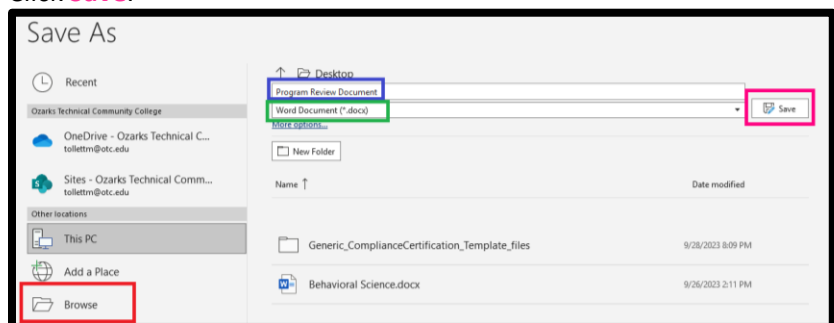
11. Go to your **Downloads** folder (or wherever the link saved the report).
12. Double-click on the file that was downloaded
It is a zip file, but you can double-click to open it like a standard folder.



13. In the folder:
 - 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**.



- 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.