



## HELP GUIDE – HOW TO ENTER YOUR THREE-YEAR PLANS IN DIAMOND

This Help Guide will walk you through how to add your Three-Year Plans to Diamond. If you have any questions, please email [planning@otc.edu](mailto:planning@otc.edu).

### STEP 1 – LOGIN TO DIAMOND

- The website is [otcc.strategicplanningonline.com](https://otcc.strategicplanningonline.com)
- Your username and password are the same as your OTC username and password.

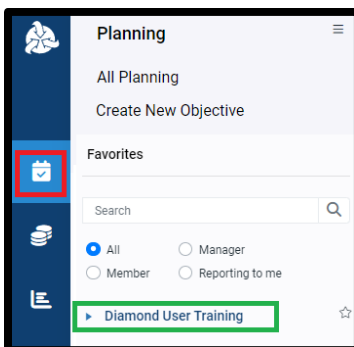
### STEP 2 – SELECT THE “2025-2026 (Current)” PLANNING YEAR

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

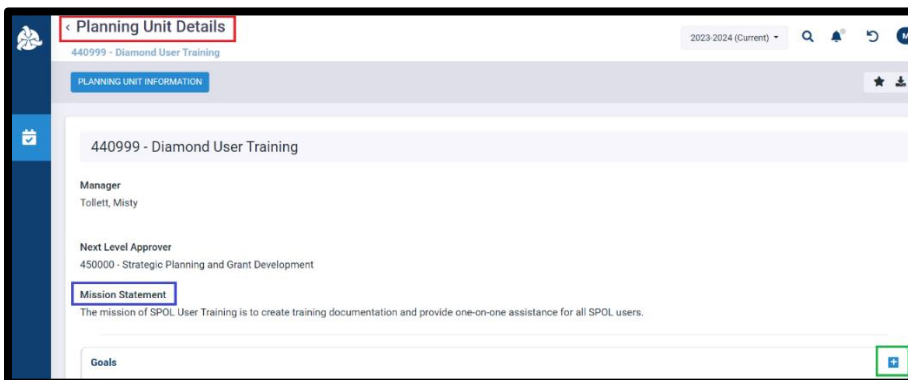


### STEP 3 – ENTER YOUR THREE-YEAR PLAN INFORMATION

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

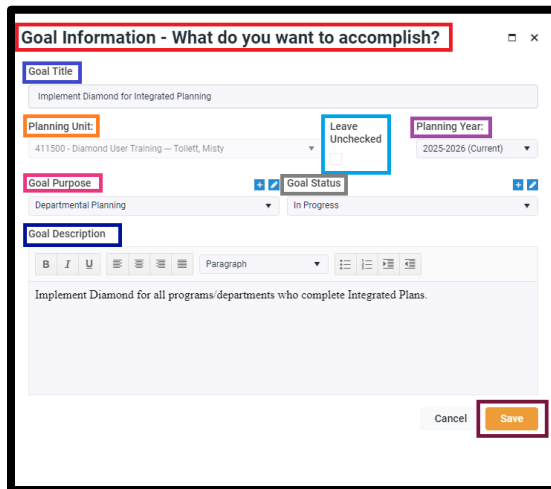


- C. The **Planning Unit Details** screen will appear.  
*If you need to update your **Mission Statement**, please email [planning@otc.edu](mailto:planning@otc.edu).*
- D. Hover over the Goals heading.
- E. Click on the **Add** icon (a blue plus sign) that appeared on the far-right side of Goals.



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- F. The **Goal Information – What do you want to accomplish?** screen will open:
1. Enter a title for your Three-Year Plan under **Goal Title**.
  2. Leave your respective program/department selected under **Planning Unit**.
  3. Leave **Leave Unchecked** unchecked.
  4. Leave the **Planning Year** as *2025-2026 (Current)*.
  5. Select the **Goal Purpose** that best fits your Three-Year Plan.
  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.

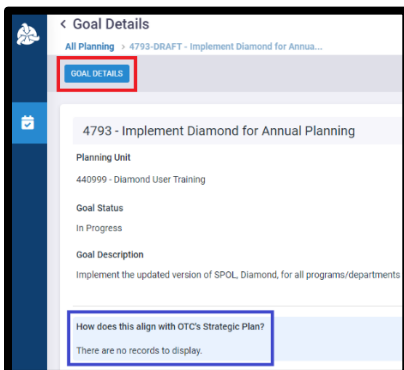


- G. The **Goal Details** screen will open after you click Save.



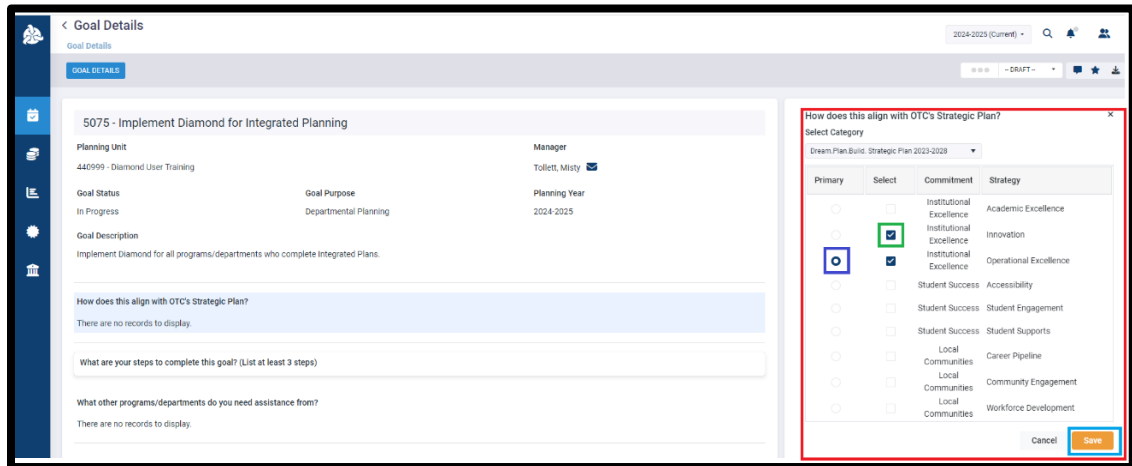
### STEP 4 – ALIGN YOUR THREE-YEAR PLAN TO OTC’S STRATEGIC PLAN

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

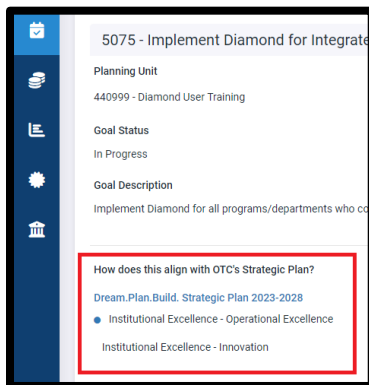


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- B. The **How does this align with OTC's Strategic Plan** screen will open on the right.
1. Click the **circle** next to the primary strategy your Three-Year Plan most closely aligns to. *It will automatically add the checkbox under Select as well.*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

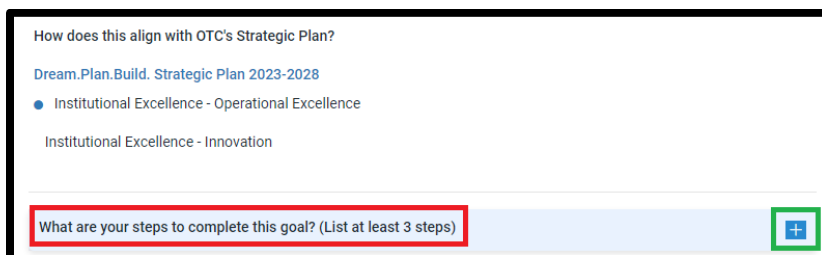


- C. The **Strategic Plan Strategy (or Strategies)** you selected will appear on the Goal Details screen.



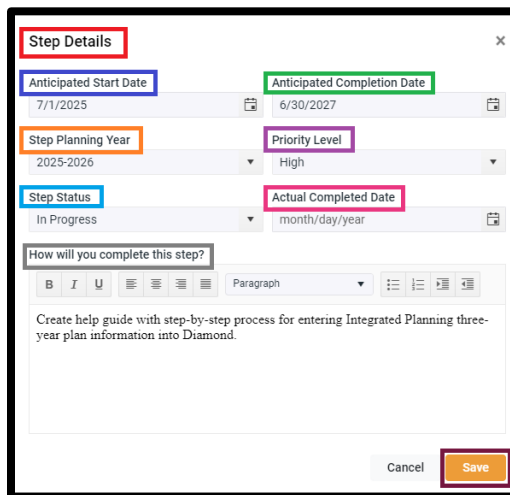
### STEP 5 – ENTER HOW YOU WILL COMPLETE YOUR THREE-YEAR PLAN

- 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.

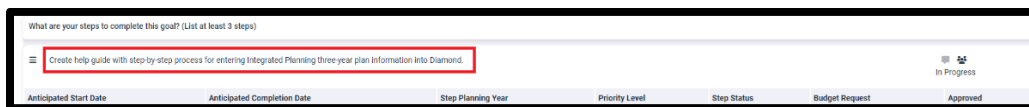


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- C. The **Step Details** entry screen will open on the right.
1. Enter the **Anticipated Start Date**.
  2. Enter the **Anticipated Completion Date**.
  3. Choose the **Step Planning Year** this step will occur in.
    - i. Example, if your start date is 7/1/2025, you will select 2025-2026 for this step.
  4. Choose your desired **Priority Level**.
  5. Choose your desired **Step Status**.
  6. The **Actual Completed Date** is optional, and you will update it in Year 2 or Year 3.
  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. You have entered your first step. It **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 Three-Year Plan and move to Step 7 when complete.



### STEP 6 – ADD NEW RESOURCE (BUDGET) REQUESTS, IF NEEDED

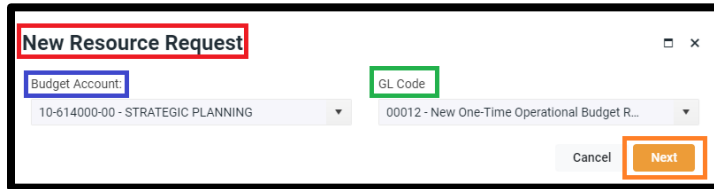
- A. Click on the step you would like to add your New Resource (Budget) Request to open it.  
*The **Step Details** entry screen will open on the right.*
1. The only date option will be **2025-2026**. It is ok to leave it as this, even if your resource request will be for a future year.
  2. Click on the **add icon** (a blue plus sign).



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B. The **New Resource Request** screen will appear.

1. Select the **Budget Account** and **GL Code** for your request and click **Next**.



2. A screen will appear where you will include additional details about your request:

- i. Select your desired **Priority Year**.
- ii. Enter a brief one-line **Description** about your request.
- iii. Select the **Budget Fiscal Year** of your request.
- iv. Select if your request **Has Ongoing Cost** or is **Connected to Another Budget Request**.
- v. Enter the **Quantity**, **Cost Per Item**, and **Total Price** of your request.
- vi. Enter the following information in the Justification box:

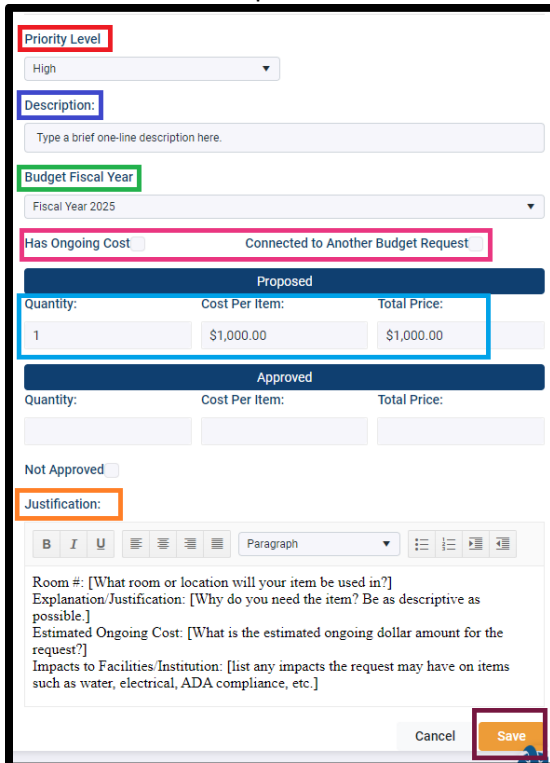
Room #:

Explanation/Justification:

Estimated Ongoing Cost:

Impacts to Facilities/Institution:

- vii. Click **Save** when complete.



**Priority Level**  
High

**Description:**  
Type a brief one-line description here.

**Budget Fiscal Year**  
Fiscal Year 2025

**Has Ongoing Cost**  **Connected to Another Budget Request**

Proposed		
Quantity:	Cost Per Item:	Total Price:
1	\$1,000.00	\$1,000.00

**Approved**

Quantity: Cost Per Item: Total Price:

Not Approved

**Justification:**

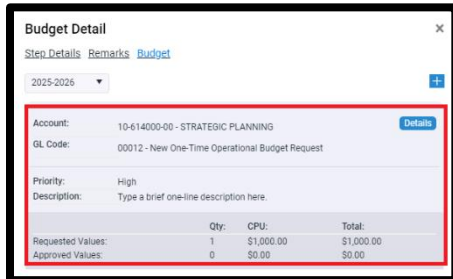
B I U Paragraph

Room #: [What room or location will your item be used in?]  
 Explanation/Justification: [Why do you need the item? Be as descriptive as possible.]  
 Estimated Ongoing Cost: [What is the estimated ongoing dollar amount for the request?]  
 Impacts to Facilities/Institution: [list any impacts the request may have on items such as water, electrical, ADA compliance, etc.]

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.



**Budget Detail** [X]

Step Details Remarks Budget

2025-2025 [+] [X]

Account: 10-614000-00 - STRATEGIC PLANNING [Details]

GL Code: 00012 - New One-Time Operational Budget Request

Priority: High

Description: Type a brief one-line description here.

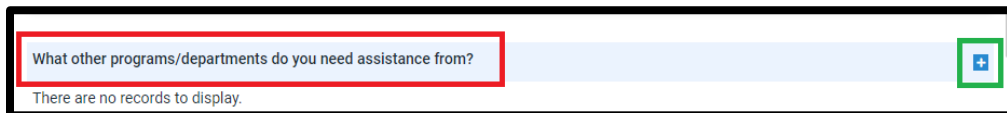
	Qty:	CPU:	Total:
Requested Values:	1	\$1,000.00	\$1,000.00
Approved Values:	0	\$0.00	\$0.00

- D. If you have additional resource requests to add for this Step, repeat items 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 YOUR THREE-YEAR PLAN (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.*

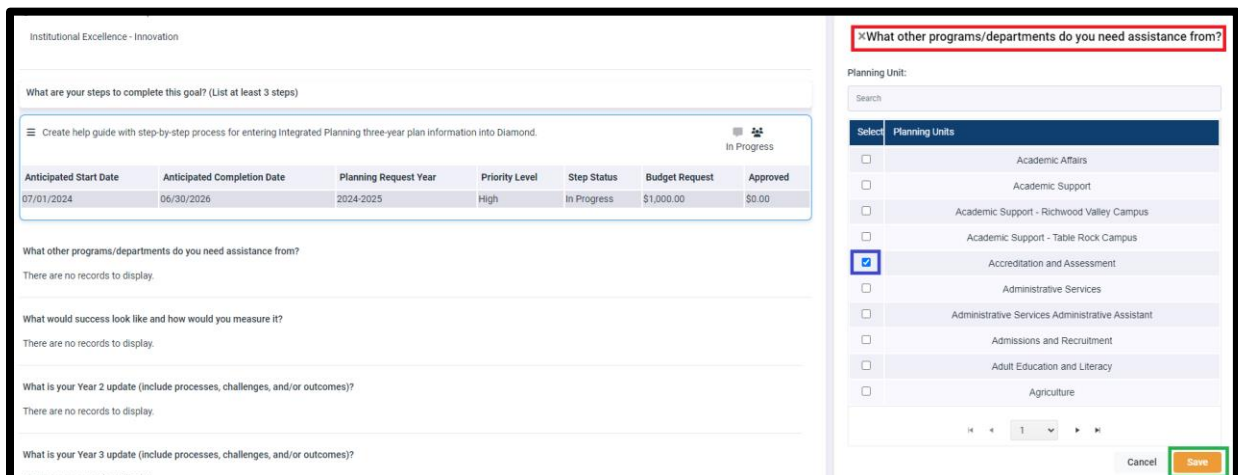
- B. Click the **Add** icon.



What other programs/departments do you need assistance from? [Add]

There are no records to display.

- C. The **What other programs/departments do you need assistance from?** screen will open on the right.
- Check** any areas you need direct assistance from to complete your Three-Year Plan.  
*You do not need to select your own program/department.*
  - Click **Save** when your selections are complete.  
*You may have to scroll down to see the save button depending on your screen size.*



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. [In Progress]

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?

There are no records to display.

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

There are no records to display.

What is your Year 2 update (include processes, challenges, and/or outcomes)?

There are no records to display.

What is your Year 3 update (include processes, challenges, and/or outcomes)?

What other programs/departments do you need assistance from?

Planning Unit:

Search

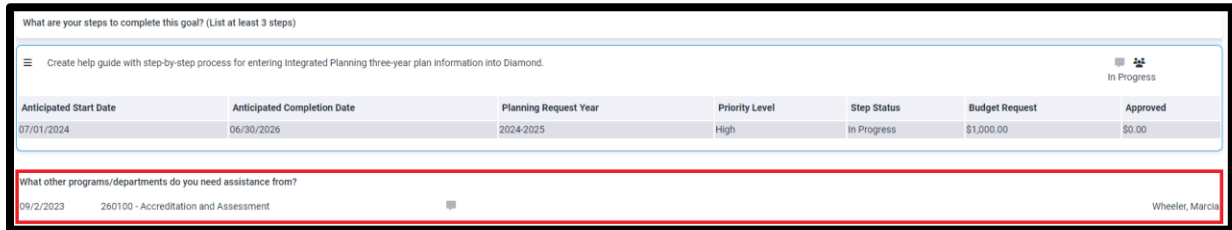
Select	Planning Units
<input type="checkbox"/>	Academic Affairs
<input type="checkbox"/>	Academic Support
<input type="checkbox"/>	Academic Support - Richwood Valley Campus
<input type="checkbox"/>	Academic Support - Table Rock Campus
<input checked="" type="checkbox"/>	Accreditation and Assessment
<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

1

Cancel Save

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



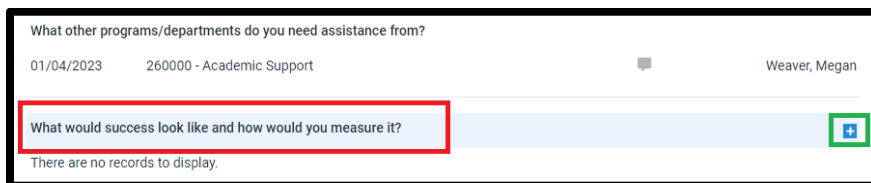
Anticipated Start Date	Anticipated Completion Date	Planning Request Year	Priority Level	Step Status	Budget Request	Approved
07/01/2024	06/30/2026	2024-2025	High	In Progress	\$1,000.00	\$0.00

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?

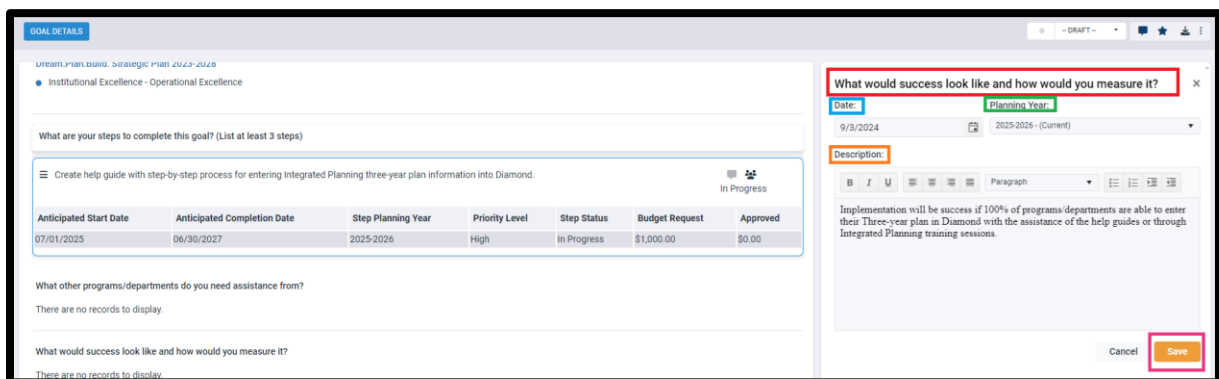
01/04/2023 260000 - Academic Support

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 **2025-2026**.
  - 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

Ustream Plan Book Strategic Plan 2025-2026

Institutional Excellence - Operational Excellence

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.

In Progress

Anticipated Start Date	Anticipated Completion Date	Step Planning Year	Priority Level	Step Status	Budget Request	Approved
07/01/2025	06/30/2027	2025-2026	High	In Progress	\$1,000.00	\$0.00

What other programs/departments do you need assistance from?

There are no records to display.

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

There are no records to display.

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

Date: 9/3/2024

Planning Year: 2025-2026 - (Current)

Description:

Implementation will be success if 100% of programs/departments are able to enter their Three-year plan in Diamond with the assistance of the help guides or through Integrated Planning training sessions.

Cancel Save

**Your Three-Year Plan has now been entered.**

**Repeat Steps 3-8 to enter each additional Three-Year Plan.**

**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.**