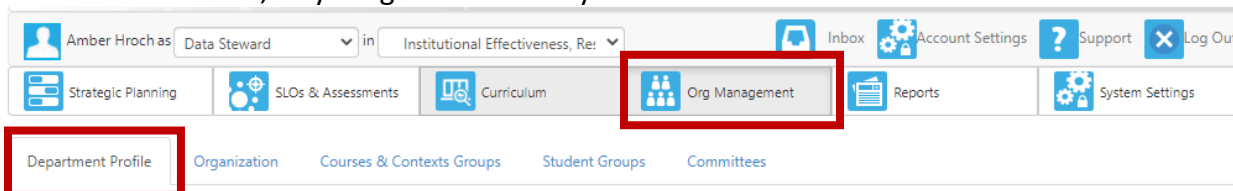


## eLumen Goals and Resource Requests Guide

October 28, 2022

### Step 1: Adding Goals to your Plan

- If you want to develop new goals, navigate to **Org Management** to **Department Profile** and **Add Goal** (see [eLumen Annual Planning Guide](#) on how to login).
  - Note, all your goals from last year have been entered into eLumen



### Institutional Effectiveness, Research, Planning, & Grants

Non-Academic: default non-academic type

#### Mission

The Institutional Effectiveness, Research, Planning, and Grants (IERPG) Division at Cerritos Colleges provides unbiased research, analysis, and reporting that is grounded in a holistic understanding of complex college processes to facilitate data-informed decision making to support the college's mission and commitment to student success and equity. We enhance the colleges internal capacity to generate external funding from federal, state, and private sources and ensure compliance with federal, state, and institutional requirements and policies. IERPG serves the internal community of Cerritos College administrators, faculty, and students, serves as the clearinghouse for official college data, and responds to external requests for information.

[Edit Mission](#)

Faculty:

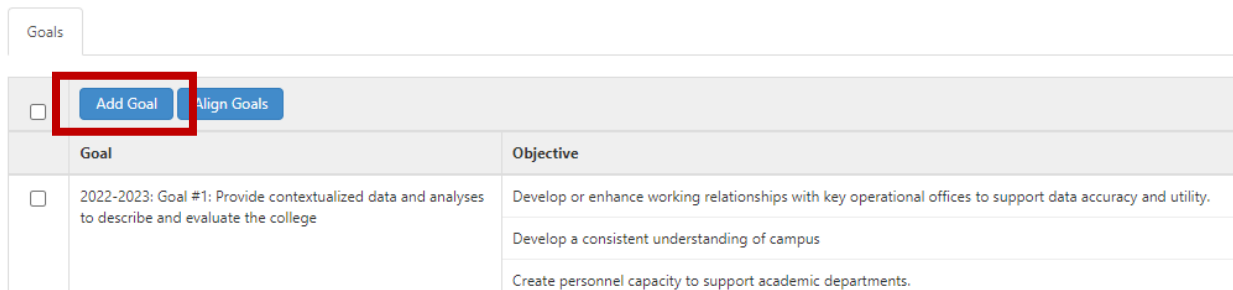
0

Courses:

0

Contexts:

0



- After you select **Add Goal**, this text box will pop up; select **Done**
  - Tip: include the **academic year** in front of your goals (e.g., 2022-2023: Goal #1, etc.); this will track what year the goal was developed (see the screenshot above)
  - Tip: **Add Objectives** can also be included for each goal



## Step 2: Navigating to your Goals and Objectives

- At the top of your plan, select **Design Mode** so it is turned on, it will show **Active Mode** (see [eLumen Annual Planning Guide](#) on how to navigate to your plan).

The screenshot shows the eLumen user interface. At the top, the user is logged in as Amber Hroch as Data Steward. The navigation menu includes Strategic Planning, SLOs & Assessments, Curriculum, Org Management, Reports, and System Settings. Below the navigation, there are tabs for Dashboard, Planner, Initiatives, Assessments, Action Plans, and RFI. The main content area displays the title '2022-2023 Non-Instructional Annual Unit Plan - IERPG' and a 'Program Review' section. A 'Download' button is visible, and a 'Strategic Initiative Report' section contains a 'To Active Mode' button, which is highlighted with a red rectangular box. Below this, there is a 'Cycle Announcement' section with the text 'Cycle Announcement is not defined'.

- Scroll down to **the Goals and Resource Requests** section
- Click on the flag and arrow to **move forward the goals** you developed

This screenshot shows the 'Goals and Resource Requests' section of the interface. The section title is 'Goals and Resource Requests' and it includes a 'Review' button. Below the title, there is a sub-section with the same title and a 'No versions created yet for this section' message. A flag and arrow icon is highlighted with a red rectangular box. Below this, there is an 'Instructions' section with the text: 'Identify your goals. For each goal, provide an action plan that gives the steps to complete the goal and the timeline; link any resource requests if applicable. When establishing the program goals for the current year, it is important to focus on and align with the College's mission and strategic goals by explicitly connecting the program goals to the College's goals. In the "Recommended Action," list the College's goal(s) that align to your program goals.'

- Select **+Add Goals and Objectives**

This screenshot shows the 'Goals and Resource Requests' section with a dialog box open. The dialog box title is 'Link Goals and Objectives to Goals and Resource Requests' and it contains the text: 'No Goals nor Objectives linked to this Strategic Initiative section'. At the bottom of the dialog box, there is a '+ Add Goals and Objectives' button, which is highlighted with a red rectangular box. There are also 'Cancel' and 'Save' buttons at the bottom right of the dialog box.

- **Select Org Type** and then, the **Division Goals and Objectives** will populate on the right-hand side
  - Once you select the Goals and Objectives you want to move forward for this annual planning cycle, they will be moved to the left-hand side
    - Note: the dark blue boxes are the goals, and the light blue boxes are the objectives
  - Select **OK** once you have moved the goals forward to your plan

Link Goals & Objectives

**Selected Goals & Objectives**

- 2022-2023: Goal #1: Provide contextualized data and analyses to describe and evaluate the college
- Regularly offer campus-wide presentations.

**Select Org Type**

Division

**Select Division**

Institutional Effectiveness, Resea

**Division Goals & Objectives**

- Work with IPR Committee to restructure and align Instructional Program Review and Annual Planning
- 2022-2023: Goal #2: Proactively support others in using college data to its full benefit
- 2022-2023: Goal #3: Improve quality of data and access to information produced by Institutional Research
- 2022-2023: Goal #4: Build and maintain organizational capacity and develop opportunities enhance quality of Institutional Research team

Cancel OK

- The below box will appear where you can choose two options by using the drop-down section:
  - Met/Not Met
  - Met/Not Met/Ongoing/On Hold
- Select your options and click **Save**

Link Goals and Objectives to Goals and Resource Requests

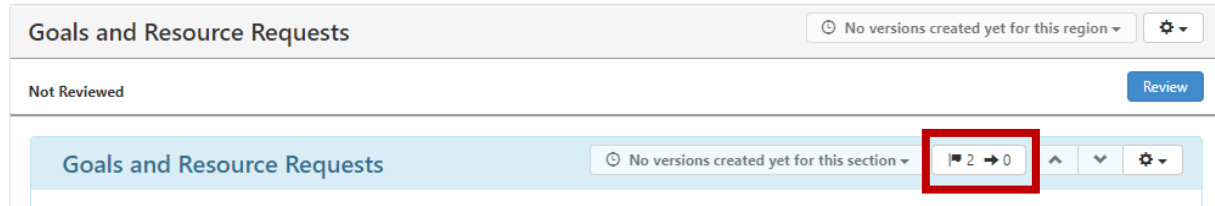
Met / Not Met

Goals and Objectives	Met	Not Met	
2022-2023: Goal #1: Provide contextualized data and analyses to describe and evaluate the college	Met	Not Met	✘
Regularly offer campus-wide presentations.	Met	Not Met	✘

+ Add Goals and Objectives

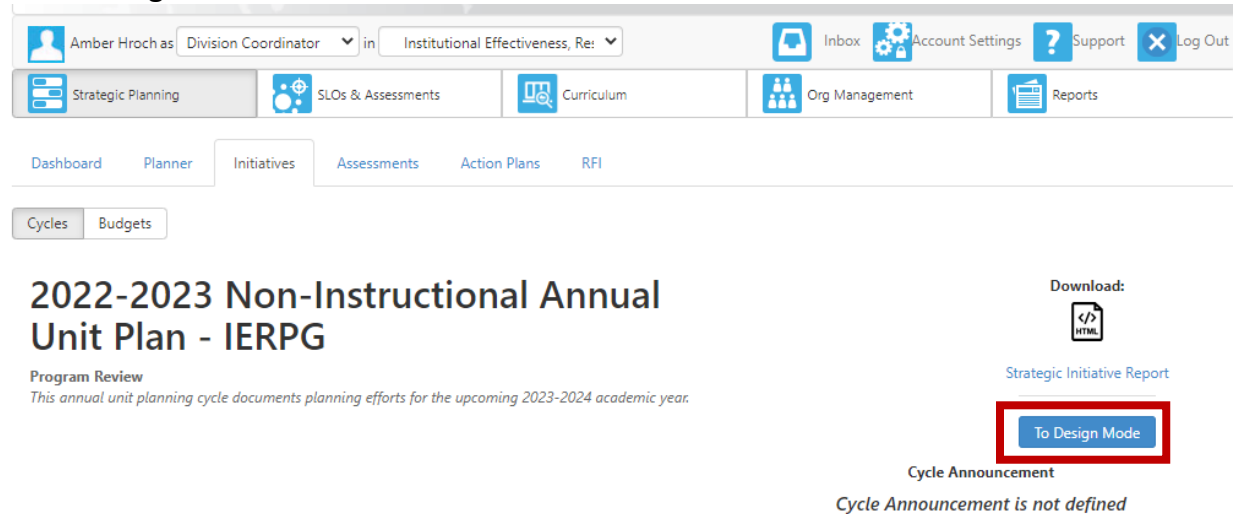
Cancel Save

- After you save, you will see two (one goal and one objective) next to the arrow that indicates your changes have been made

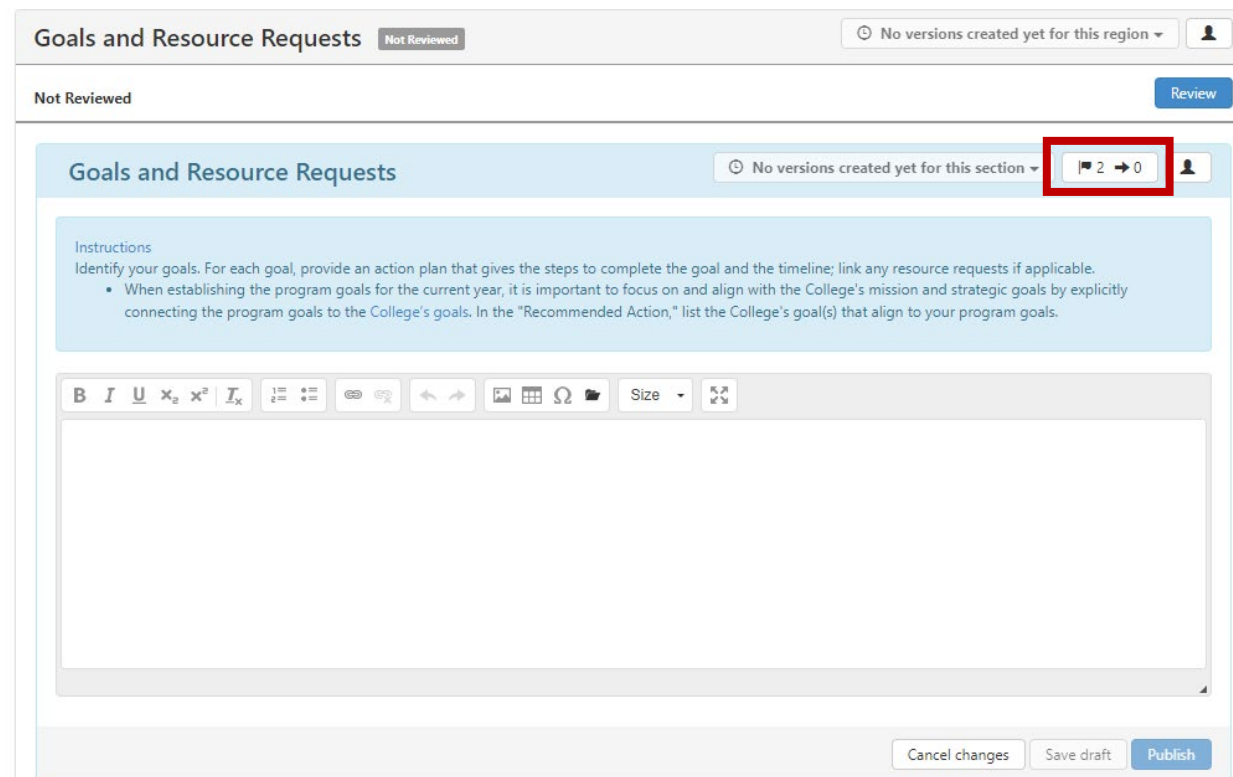


### Step 3: Linking Goals to Resource Requests

- Go back up to the top of eLumen and select **Active Mode** so it is turned on, it will show **Design Mode**



- Scroll down to the **Goals and Resource Requests** section
- Click on the **flag with the arrow** to link your goals and objectives



- This box will pop up where you can indicate if your goal has been met or not

Goals and Objectives	Met	Not Met	Ongoing	On Hold
2022-2023: Goal #1: Provide contextualized data and analyses to describe and evaluate the college				
Recommended Actions	+ Align Action			
Regularly offer campus-wide presentations.				
Recommended Actions	+ Align Action			

+ Link Unaligned Recommended Action

Cancel Save

- After a selection has been made, the box turns blue (**Ongoing** was indicated for the goal and objective)
- Select **+Align Action** to add actions and link resource request(s)

Goals and Objectives	Met	Not Met	Ongoing	On Hold
2022-2023: Goal #1: Provide contextualized data and analyses to describe and evaluate the college				
Recommended Actions	+ Align Action			
Regularly offer campus-wide presentations.				
Recommended Actions	+ Align Action			

+ Link Unaligned Recommended Action

Cancel Save

- The following box will appear. Select **Create New Action**

Align Action to 2022-2023: Goal #1: Provide contextualized data and analyses to describe and evaluate the college

Use Existing Action **Create New Action**

Org. Entity: Institutional Effectiv... Terms: 30 selected Strategic Initiative: 2022-2023 Non-Inst... Section: Any Goals & Objectives: Any

Select one Action  
No Actions To Link

Cancel Add New Action

- The following box will appear. Add text into the **Recommended Action** and how this aligns to the [College's Goals](#)
- **Action Type** is a drop-down menu where you can select an option:
  - **Action:** Action to be taken on the unit- or division-level
  - **Proposed Action:** Thoughts on possible next steps for improvement
  - **Study Needed:** Need to do more analysis
  - **Reflection:** Thought on previous academic year
  - **New Resource Request:** Purchase and apply new resource(s)

Align Action to 2022-2023: Goal #1: Provide contextualized data and analyses to describe and evaluate the college

Use Existing Action Create New Action

**Recommended Action**

Develop Tableau dashboards to provide the campus with relevant and timely data to inform decision-making. Aligned to Goal A and Goal F.

**Action Type**

New Resource Request

Goals and Objectives

- 2022-2023: Goal #1: Provide contextualized data and analyses to describe and evaluate the college

Linked SLOs [Link SLOs](#)

+Add a Resource Request

Cancel Add New Action

- If **New Resource Request** is selected in **Action Type**, click **+Add a Resource Request** and additional textboxes will appear.

Align Action to 2022-2023: Goal #1: Provide contextualized data and analyses to describe and evaluate the college

Use Existing Action Create New Action

**Recommended Action**

Develop Tableau dashboards to provide the campus with relevant and timely data to inform decision-making. Aligned to Goal A and Goal F.

**Action Type**

New Resource Request

Goals and Objectives

- 2022-2023: Goal #1: Provide contextualized data and analyses to describe and evaluate the college

Linked SLOs [Link SLOs](#)

+Add a Resource Request

Cancel Add New Action

- Add text into the **Resource Name**
- **Resource Type** is a drop-down menu where you can select an option:
  - **Other Resource Request:** Any other request needed
  - **Technology and Software Resource Request:** Technology and software needs
  - **Facilities Resource Request:** Facilities and equipment needs
  - **Professional Development Resource Request:** Training and professional development needs
  - **Other Staffing Resource Request:** Other staffing needs (e.g., management, confidential, etc.)
  - **Classified Staffing Resource Request:** Any classified needs
  - **Faculty Staffing Resource Request:** Any new (growth) or replacement faculty needs
    - Note: faculty requests must be submitted in the annual unit plan to be considered for FHP
- Add text into the **Amount**
- Lastly, save your changes by selecting **Add New Action**

Align Action to 2022-2023: Goal #1: Provide contextualized data and analyses to describe and evaluate the college ✕

Use Existing Action

**Recommended Action**

Develop Tableau dashboards to provide the campus with relevant and timely data to inform decision-making. Aligned to Goal A and Goal F.

**Action Type**

New Resource Request ▼

**Goals and Objectives**

- 2022-2023: Goal #1: Provide contextualized data and analyses to describe and evaluate the college

Linked SLOs [Link SLOs](#)

+Add a Resource Request

Resource Name ✕

Tableau Online, annual subscription

Resource Type

Technology and Software Resource Request ▼

Amount

\$20,000

- Once you have saved that action, the **Recommended Actions** will show in the **Link Goals and Objectives to Goals and Resource Requests**
  - Note: you can add additional actions per goal through **+Align Action** under the same goal in **Recommended Actions**
- Click **Save**

Link Goals and Objectives to Goals and Resource Requests

Goals and Objectives	Met	Not Met	Ongoing	On Hold
2022-2023: Goal #1: Provide contextualized data and analyses to describe and evaluate the college				
Recommended Actions	Develop Tableau dashboards to provide the campus with relevant and timely data to inform decision-making. Aligned to Goal A and Goal F.		0 linked SLOs 1 resource requests	✖
	+ Align Action			
Regularly offer campus-wide presentations.				
Recommended Actions	+ Align Action			

+ Link Unaligned Recommended Action

Cancel Save

- Once you save, the **Recommended Actions**, you will see this has been saved with the arrow in the **Goals and Resource Requests** section

Goals and Resource Requests Not Reviewed No versions created yet for this region

Not Reviewed Review

Goals and Resource Requests No versions created yet for this section 2 → 1

**Instructions**  
Identify your goals. For each goal, provide an action plan that gives the steps to complete the goal and the timeline; link any resource requests if applicable.

- When establishing the program goals for the current year, it is important to focus on and align with the College's mission and strategic goals by explicitly connecting the program goals to the College's goals. In the "Recommended Action," list the College's goal(s) that align to your program goals.

B I U x<sub>2</sub> x<sup>2</sup> I<sub>x</sub> [List] [Link] [Image] [Table] [Omega] [Folder] Size [Dropdown] [Fullscreen]

Cancel changes Save draft Publish



## Step 4: Adding a Funding Source and Prioritizing Resource Requests

- At the top of your plan, select **Management**, and select **Budget Management**

The screenshot shows the eLumen dashboard interface. At the top left is the eLumen logo. Below it, the user's name 'Amber Hroch' is displayed along with their role 'Data Steward' and the current plan 'Institutional Effectiveness, Re'. Navigation icons for 'Inbox', 'Account Settings', 'Support', and 'Log Out' are visible. A horizontal menu contains 'Strategic Planning', 'SLOs & Assessments', 'Curriculum', 'Org Management', 'Reports', and 'System Settings'. Below this is a secondary menu with 'Dashboard', 'Planner', 'Initiatives', 'Assessments', 'Action Plans', and 'RFI'.

### 2022-2023 Non-Instructional Annual Unit Plan - IERPG

Program Review  
*This annual unit planning cycle documents planning efforts for the upcoming 2023-2024 academic year.*

Download:



Strategic Initiative Report

To Design Mode

Cycle Announcement

Cycle Announcement is not defined

This screenshot shows a dropdown menu for 'Management'. The 'Management' option is highlighted with a red box, and its sub-option 'Budget Management' is also visible below it. To the right of the menu are buttons for 'Save all as draft' and 'Publish all'.

The screenshot shows the 'Overview' section of the plan. It includes a 'Not Reviewed' status indicator, a 'Review' button, and a message: 'No versions created yet for this region'. There is also a user profile icon.

- Your resource request(s) will appear (see the screenshot below)
- You can modify the **Funds**, **Budget Category**, and **Status**

This screenshot shows a table of resource requests. The table has columns for 'Requester', 'Resource Requested', 'Type', 'Funds', 'Budget Category', and 'Status'. The 'Funds', 'Budget Category', and 'Status' columns are highlighted with a red box. The first row shows a request for 'Tableau Online, annual subscription' for \$20,000, with a budget category of '--No Budget Category' and a status of 'Pending'.

Requester	Resource Requested	Type	Funds	Budget Category	Status
1. Amber Hroch Institutional Effectiveness, Research, Planning, & Grants	Tableau Online, annual subscription \$20,000	Technology and Software Resource Request	\$0.00	--No Budget Category	Pending

- Funds:** enter in the amount you are requesting
- Budget Category:** select one of the following budget sources
  - Categorical – Other
  - Categorical – Equity
  - Categorical – SSSP
  - General Fund (Program 100)
  - Grants/Contracts
  - Instructional Equipment
  - Other Funding
  - Perkins
  - Vintage

- **Status:** leave the status as pending so all your requests can roll forward to your Division Dean (there are three options: **Pending, Accepted, Rejected**)

<input type="checkbox"/>	Requester	Resource Requested	Type	Funds	Budget Category	Status
<input type="checkbox"/>	1. Amber Hroch Institutional Effectiveness, Research, Planning, & Grants	Tableau Online, annual subscription \$20,000	Technology and Software Resource Request	\$20,000.00	General Fund (Program)	Pending <input type="button" value="Change priority"/>

- **Change priority:** you can move requests up or down by using the **↑ Set to highest, ↓ Set to lowest, or ≡ Set to...** to prioritize your resource request from greatest to least importance

<input type="checkbox"/>	Requester	Resource Requested	Type	Funds	Budget Category	Status
<input type="checkbox"/>	1. Amber Hroch Institutional Effectiveness, Research, Planning, & Grants	Tableau Online, annual subscription \$20,000	Technology and Software Resource Request	\$20,000.00	General Fund (Program)	Pending <input type="button" value="Change priority"/>

Change priority ▾

- ↑ Set to highest (1)
- ↓ Set to lowest (1)
- ≡ Set to...

Overview Not Reviewed

- If you select the last option, **≡ Set to**, the following will populate
- You can set the priority a number if you have multiple requests
- **Set priority** to save

### Set priority for resource request ✕

Amber Hroch Institutional Effectiveness, Research, Planning, & Grants	<b>Requested:</b> Tableau Online, annual subscription \$20,000  <b>Type:</b> Technology and Software Resource Request	<b>Status:</b>  <b>Cost:</b> \$20,000.00
--	--	---

Enter a new priority for the resource request, it must be between 1 and 1.

- **Save Change** to save your work

Overview ▾ All changes saved Management ▾

1 - 1 of 1 1

<input type="checkbox"/>	Requester	Resource Requested	Type	Funds	Budget Category	Status
<input type="checkbox"/>	1. Amber Hroch	Tableau Online, annual subscription	Technology and Software	\$20,000.00	General Fund (Program)	Pending <input type="button" value="Change priority"/>