



New Objective Cheat Sheet

Entering a New Objective

1. Click on the Planning icon on the *navigation bar* to the left of the page.



2. Click the Planning Unit you are creating the objective for.

3. This will open the **Planning Unit Details** page. The headers listed are Objective, Tasks, Associations, and History. Click on the Objectives header.

4. To add a new Objective click on the Objectives title. Fill the following Fields:

- Objective Title
- Objective Description – SMART Objective - Specific, Measurable, Attainable, Results-driven, Time-limited

5. Select from the drop-down box:

- Planning Unit – the department that will carry out this objective
- Planning Year – the year the objective will begin
 - Multi-year objectives can be extended into future planning years
- Objective Purpose
- Objective Status

6. Click the save icon (Yellow Button) at the lower right of the page.



7. You will then navigate to the **Objective Details** page.



8. To add a task click on the task header within the objective. Then click the task header again to open the task details box.

9. Enter individual records in each of the following areas:

- **Tasks** – the steps you'll follow or strategies you'll employ to achieve the objective (click the drop-downs to add a start date, due date, task type, priority level, and status, description – (You can sort your tasks in whichever order you like by holding the three bar icon ≡ in the left corner and dragging it to the desired location)

The 'Task Details' dialog box is a form for entering task information. It includes the following fields:

- Start Date:** 5/16/2023
- Due Date:** month/day/year
- Task Type:** Select
- Priority Level:** Select
- Status:** Select
- Completed Date:** month/day/year
- Description:** A rich text editor with a toolbar containing Bold (B), Italic (I), Underline (U), bulleted list, numbered list, indent, and outdent icons. The text area is currently empty.

At the bottom right of the dialog are 'Cancel' and 'Save' buttons.

10. Required data to enter:

- **Intended Results** – what you want to see happen as a result of a) the objective overall and b) specific tasks (strategies)
- **Assessment Measures** – the tools, methods, and/or data sources you will use to determine whether or not you achieved your intended results
- **Units Impacted** – select from the list any other departments who will need to assist you in carrying out this objective
- **Adding Evidence** – supporting evidence and documentation for intended results/benchmarks, assessment measure, actual, and/or use of results

11. Bonus data you may want to include:

- **Status Reports** – a good place to add any other information that doesn't fit elsewhere
- **Associated Standards** – create a link between this objective and an accreditation standard, if appropriate

12. Approve the objective by clicking <Approve> at the top right of the page (planning unit managers only). This takes the objective out of draft mode and sends it through to the next approver

