Adding Collaborators and Goals
Training on eLumen Functions for Program/Department Coordinators

Strategic Initiative Cycle: Adding Collaborators and Goals

Adding Collaborators to an SI Section

- In eLumen the Strategic Initiative (SI) is equivalent to the Program Review.

The first step in the SI cycle is to add collaborators who will be adding to and editing the Strategic Initiative on eLumen, i.e., who will actively type into and help complete the Program Review.

After logging into eLumen and selecting your role and program from the top drop-down menus, click the Strategic Planning tab and then the Initiatives tab. In the middle of the screen, under the Type drop-down menu, select Program Review. Scrolling down you can now see last year’s 2019-2020 Program Review Progress Report, the full Program Review from 2018-2019, and the current cycle’s 2020-2021 Program Review Progress Report.

Click on the link to the 2020-2021 Program Review Progress Report to open the official program review in eLumen where the program’s responses and reflections will be recorded.
To add a collaborator(s), first click on the blue To Design Mode button.

then, directly underneath this header, click the Manage SI Collaborators button on the right-hand side of the grey bar labeled Sections (note the blue button now says To Active Mode).

A new window will open. In the right-hand column of this pop-up, under Available Users – Role, choose an appropriate role for the collaborator you wish to add from the options in the drop-down menu (e.g., Faculty). Then use the Search box to type in and quickly find the collaborator’s name within that role.

Once you see the name of the collaborator you wish to add, click on their full name in the right column of the window. Their name will jump over to the left column as an Assigned Collaborator. Click the blue Save button (scroll down to see it if needed) and the pop-up window will close.

To remove an Assigned Collaborator, click on their name in the left column and their name will jump back to the right column un-assigning them. Please always leave both Betsy and Alyson in the list of Assigned Collaborators, in addition to the Program and Department Coordinators.
Once any and all changes are made to the list of Assigned Collaborators, click the blue Save button (again, you may need to scroll down to see it) and then the pop-up window will close. The program’s collaborators are now added to the SI / Program Review.

To wrap up this process of adding collaborators, scroll back up to the top of the screen and click the blue To Active Mode button to go back to actively completing the SI / Program Review.

**Adding Goals (Prior) to a SI Section**

The second step in the SI cycle is to bring in prior goals to the current SI that have either been met or are still in progress since the previous SI cycles (i.e., goals that have been met or are still in progress from either the 2019-2020 Program Review Progress Report or from the full 2018-2019 Program Review).

After entering the 2020-2021 Program Review Progress Report by clicking the link under the Initiatives tab, the Program/Department Coordinator can bring in goals from prior SI cycles to the Goals and Objectives section in the SI by first clicking on the blue To Design Mode button.

Scrolling down to the Goals and Objectives section, click the Goal (flag) icon on the Goals and Objectives (Prior) – Progress and Action Plans header.
In the window that pops up, click the + Add Goals and Objectives button. This is where you will link to Institutional, Division, or Department Goals and set the appropriate measurement rubric.

From the Select Org Type drop-down menu choose the appropriate option (i.e., select Department for program-level goals). The corresponding goals will appear on the right side of the window.

Under the Department Goals & Objectives list on the right side of this window, click on each goal from the two prior SI cycles that is to be included in this current ‘20-‘21 Progress Report. Each goal will move to the Selected Goals & Objectives column on the left. When done, click OK.

In the next window that opens after clicking OK, but before clicking Save, use the drop-down menu in the upper right corner to select Multiple Level Benchmark as the rubric for the goals.
Once the correct rubric is selected, select the blue Save button and you’re done. The program’s goals from the two prior SI cycles are now added to the current SI cycle, the 2020-2021 Program Review Progress Report. From here we move on to add the new goal(s) created for this SI cycle.

**Adding Goals (New) to a SI Section**

The third step in the SI cycle is to bring in the new goal(s) developed to tie into either the Vision for Success Goals, the college’s new Educational Master Plan Goals, or the Guided Pathways Pillars as incorporated in the college’s EMP.

After entering the 2020-2021 Program Review Progress Report by clicking the link under the Initiatives tab, the Program/Department Coordinator can bring in the new goal(s) by first clicking on the blue To Design Mode button.

Scrolling down to almost the end of the Goals and Objectives section, click the Goal (flag) icon on the Goals and Objectives (New) – Action Plans header.

In the window that pops up, click the + Add Goals and Objectives button. This is where you will link to Institutional, Division, or Department Goals and set the appropriate measurement rubric.

From the Select Org Type drop-down menu choose the appropriate option (i.e., select Department for program-level goals). The corresponding goals will appear on the right side of the window.
Under the **Department Goals & Objectives** list on the right side of this window, click on the new goal(s) that is to be included in this ‘20-’21 Progress Report.

![Image of selected goals]

The goal(s) will move to the **Selected Goals & Objectives** column on the left. When done, click **OK**.

![Image of selected goal and OK button]

In the next window that opens after clicking OK, **but before clicking Save**, use the drop-down menu in the upper right corner to select **Multiple Level Benchmark** as the rubric for the goals.

![Image of selected goal and multiple level benchmark]

Once the correct rubric is selected, select the **blue Save** button and you’re done bringing in goals. The program’s new goal(s) is now added to the 2020-2021 Program Review Progress Report.

To wrap up this process of adding goals (both prior and new), scroll back up to the top of the screen and click the **blue To Active Mode** button to go back to actively completing the SI / Program Review.

![Image of program review progress report]
Next Steps…

Assessing Goals

Once back in Active Mode (note that when you are in Active Mode, the blue button will actually say To Design Mode), any program coordinator or collaborator can now assess the program’s goals using the Multiple Level Benchmark rubric.

Assessment begins by first selecting the Goal (flag) icon in the section header. The collaborator can then select a Benchmark Level for each goal, like scoring an SLO assessment. The point of this is to discuss work towards the program’s goals, including goals the program has achieved since the last SI cycle, and to attach Action Plans and Resource Requests as needed.

Detailed steps for Assessing Goals are provided in the next training document, “Completing the Strategic Initiative.”

Writing Responses and Reflections

Once back in Active Mode (again, when you are in Active Mode the blue button will say To Design Mode), the coordinator/collaborator can complete the rest of the sections in the SI by writing their responses and reflections in the provided text boxes. The work in these sections can be saved as drafts and the program can decide which draft to publish.

Note that only Program/Department Coordinators and Data Stewards can alternate between Active Mode and Design Mode in the SI. Other users (i.e., collaborators) are always in Active Mode. All users working on the SI can view the current published version of any section. Collaborators on a section will see the current draft version and can edit the text.

To review and recover text from previous drafts, use the drop-down menu in the Version Information of the section.

To view the collaborators on a given section, select the Person Icon in the top right corner of a section.

Periodically and when finished writing, the coordinator/collaborator can Save Draft to save a copy of their work for other collaborators. When a draft is ready to be shared with all users on the Strategic Initiative and printed in a Strategic Initiative Report, the program’s Administrator can select Publish All for the SI.
Detailed steps for Writing Responses and Reflections, and Saving Drafts and Publishing the final report, are provided in the next training document, “Completing the Strategic Initiative.”

Step 2 of 3 is now complete. Please go to Step 3 of 3 to finish completing the 2020-2021 Program Review Progress Report.