# CampusLabs Compliance Assist® Quick Reference

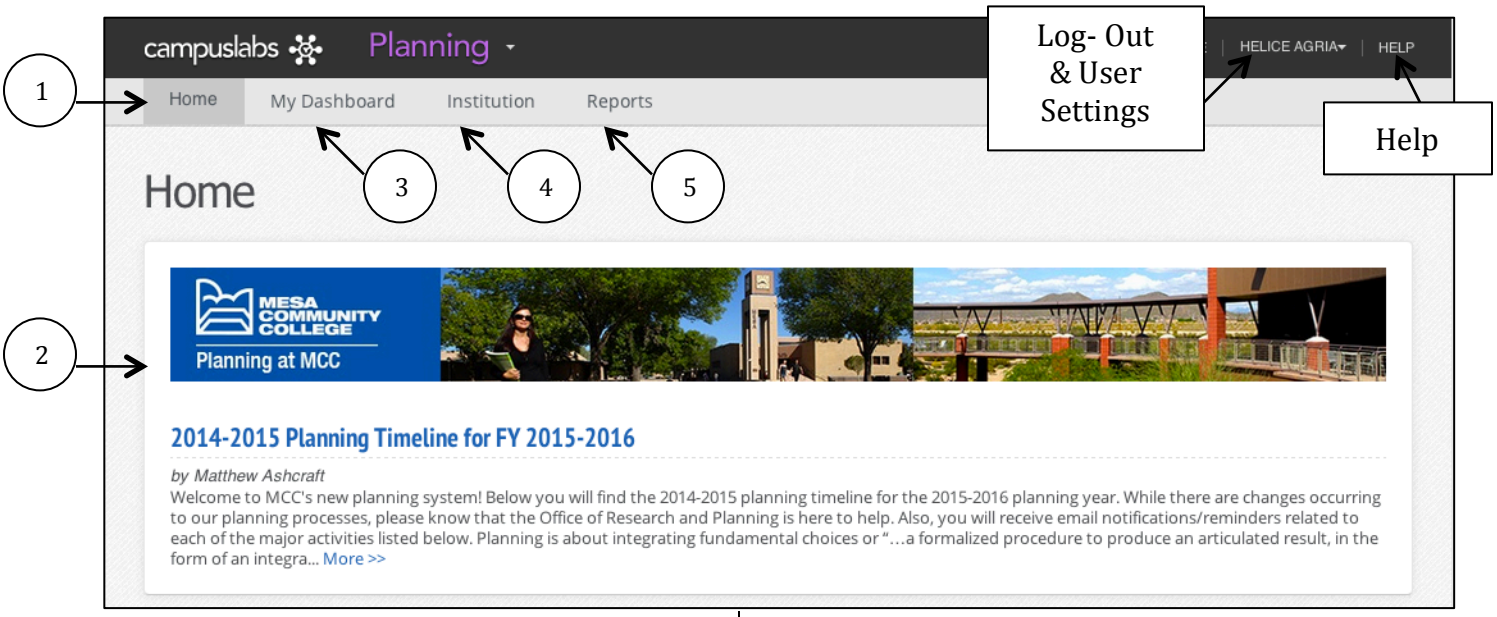
## Log-in Instructions

**Follow the link to access CampusLabs Compliance Assist®** – https://mesacc.compliance-assist.com/

**Username:** MEID
**Password:** MEID Password

**Account set-up/maintenance** – If you have forgot or need to change your password, please visit: https://memo3.maricopa.edu/usertool.html.

**Browser/Platform Compatibility** – The recommended browser for CampusLabs Compliance Assist® is Google Chrome in both the Mac and Windows platforms. Firefox and Internet Explorer 9 can work, but will not be optimal. Safari is NOT recommended.




## Getting Started

1 **Interface Tabs**– The tabs can be used to navigate to he different system options. By default you will be brought to the Home Tab.

2 **Announcements** – On the **Home Tab** you will find **Announcements** about the Budget & Planning Process.

3 **MyDashboard** – The **Dashboard** is where you can build **Department Plans**, view resource documents and view/assign planning roles.

4 **Institution** – Review shared Institutional Planning Items by Department.

5 **Reports** – Create and run reports like **Department Plans**. **Note:** Some reports will be pre-loaded.

**Help** – Access the CampusLabs Compliance Assist® HelpCenter for FAQs, tutorials, etc.

**Log-Out/User Settings** – Access your user settings options. **Note:** Always log-out on public computers.

# MyDashboard

## My Roles Tab

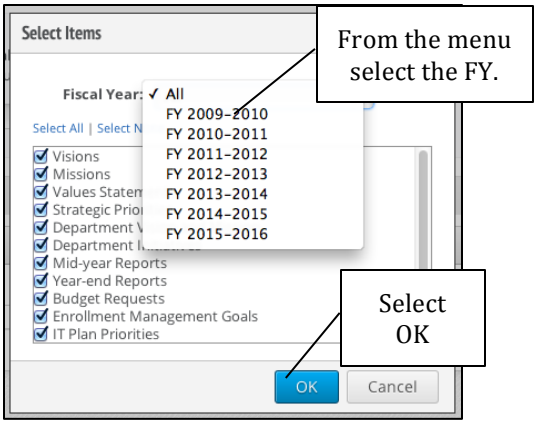
### *Filtering the Fiscal Year (FY)*

From this tab you can Filter your role as a planner by Fiscal Year (FY). It is important to set this option first to make sure you are working in the correct plan.

**Follow these steps to set your Filter:**

1. From the My Roles Tab click the blue **Edit Filter** button.


2. From the **drop-down menu** select the appropriate FY to work on. **Note:** Refer to the Budget & Planning Cycle for details.



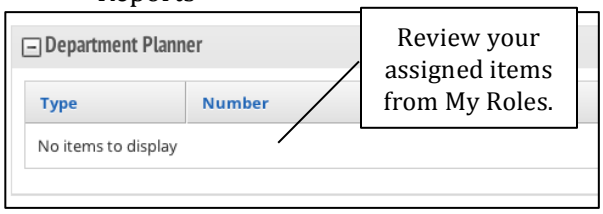

3. Select **OK**. **Note:** This Filter option is browser specific and might have to be set-up again if you access the tool from a different computer or with a different browser.

### *Assigned Items*

Also **from the My Roles Tab you will be able to view the Department Planner**. This functions as a task list allowing you to view and manage any assigned planning items.

**Assigned planning items might include:**

- Vision and Mission Statements
- Department Initiatives
- Reports




## Strategic Plans Tab

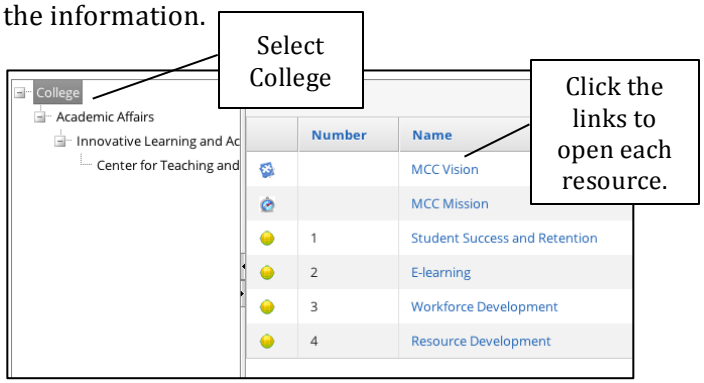
This tab includes MCC's Strategic Priorities AND Vision, Mission and Values statements. These are here as a reference and later will be used to relate your department initiatives to.

**To view these resources:**

1. From the **Strategic Plans Tab** select **College**.

2. A list of links will appear.

3. Click on each link name respectively to review the information.




## Department Plans Tab

This is where you will spend most of your planning time in CampusLabs Compliance Assist®.

From this area you will:

- Share your Department Vision and Mission
- Create Department Planning Initiatives
- Build Mid-Year and Year-End Reports
- Make Budget Requests

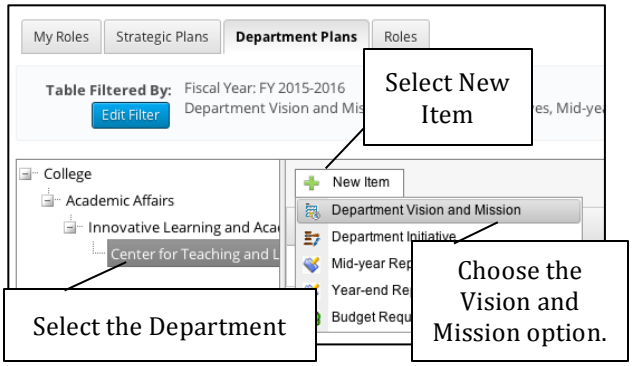
**Tip:** Click on the "Speech Bubble" icon for details on what to enter into each content area throughout the Department Plans interface.

### *Department Mission & Vision*

Add your Department Vision and Mission to the system to include it in your planning process.

1. Navigate to your Department Planning window by selecting the following from the left-panel organizational structure: **College > Division (Academic Affairs, Student Affairs, etc.) > *Your Department*.**

2. Click **New Item** and from the menu select **Department Vision and Mission**.




3. In the window enter the details for each section using the **Edit** option and select **Update**.

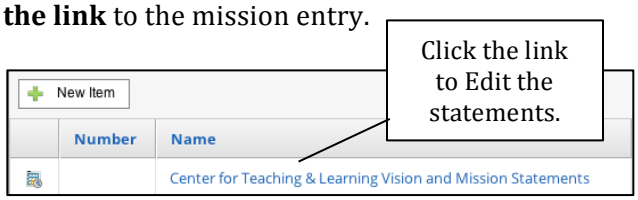
4. Select the FY dates.

5. From the progress menu <u>ALWAYS select</u> **Ongoing**.

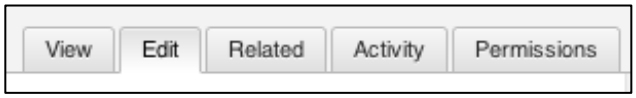
6. Select **Save** to save progress and continue editing OR **Save & Close** to exit the window.

7. Repeat this process for every section.

**Editing**
To edit your Department Mission and Vision:
1. From the Department Planning window **click the link** to the mission entry.




2. Select the **Edit tab** from the menu.




3. Enter your edits and select **Save**.

***Department Initiatives***
Add your Department Initiatives to the system to include it in your planning process.

1. **Navigate to your Department Planning window** by selecting the following from the left-panel organizational structure: **College > Division (Academic Affairs, Student Affairs, etc.) > *Your Department***.

2. Click **New Item** and from the menu select **Department Initiative**.

3. In the window enter **the initiative number, title and description**.

4. Enter the **Related Needs**. Click the **Edit** option, enter the information and select **Update**.

5. From the drop-down menu choose the **Informed Improvement (ii) step** that the initiative is currently in.

6. Provide supporting information that describes your Informed Improvement (ii) process related to the initiative. Click the **Edit** option, enter the information and select **Update**.

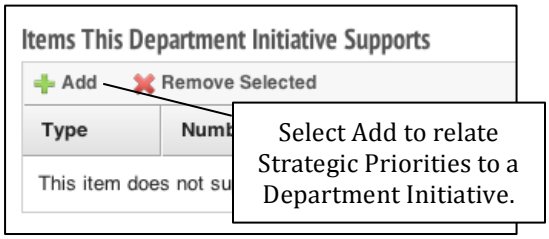
7. Enter the **FY dates and the current progress** from the drop-down menu.

**Note:** To edit your Department Initiative, from the Department Planning window **click the link** to the initiative entry and **select the Edit tab** from the menu. Enter your edits.

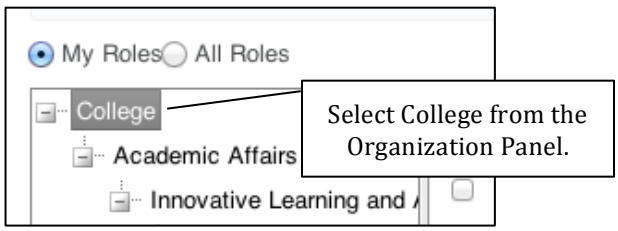
**Relating Initiatives**
As part of the planning process <u>ALL Department Initiatives MUST be related to a specific Strategic Priority (Priorities)</u>.

**To relate your initiative follow these steps:**
1. From the Department Planning window **click the link** to the initiative entry and **select the Edit tab** from the menu.

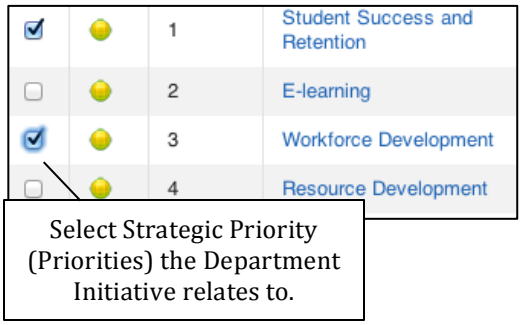
2. In the relate window below the title "Items This Department Initiative Support", select **Add**.




3. From the left-panel organizational structure **select College**.



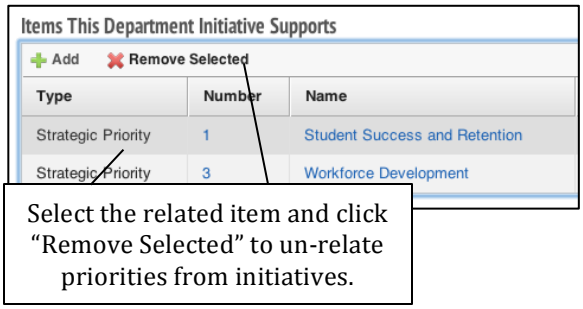
4. From the list **place a check mark in the box next to the Strategic Priority (Priorities)** that the Department Initiative relates to.




5. Select **Add**.

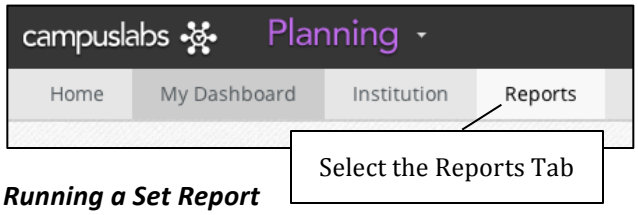
6. Select **Close**.

**Note:** To remove a related item click it on the list and choose **Remove Selected**.




## Reports Tab

In the Reports area you can run set reports (created by the system administrator) or add a custom report. To access the Reports area, from the tab menu select **Reports**.



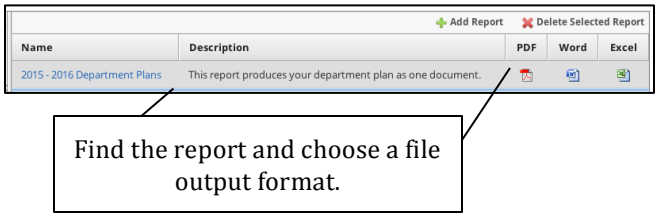

***Running a Set Report***

1. Select the **Department Tab** from the menu.

2. Navigate to your Department Reports window by selecting the following from the left-panel organizational structure: **College > Division (Academic Affairs, Student Affairs, etc.) > *Your Department***.

3. On the list, **find the report** you want to run, e.g. 2015-2015 Department Plans.

4. Run the report by selecting an output option (PDF, Word, Excel options are available.)




**Note:** A pop-up window will display when generating reports. Depending on your browser and browser settings, the MS Word and MS Excel options will download files to your computer and the PDF version will preview a report that you can download from the page.

***Creating a Custom Report***

You can create custom reports that include data types of your choice from the planning system.

**Follow these steps to create a custom report:**

1. Select the **Department Tab** from the menu.

2. Navigate to your Department Reports window.

3. Select **Add Report** from the upper-right side of the Reports Window.


4. Carefully follow the prompts to set the parameters of your report and select **Next** to move through each part of the report set-up.

5. Select **Create and Run**.

## User Settings

Access User Settings by clicking on *your name* in the upper-right. Settings include an option to edit rich text items in-place or in new window.

## Help

**CampusLabs Compliance Assist® HelpCenter:**
http://casupport.campuslabs.com/home

**Office of Research & Planning:**
http://www.mesacc.edu/about/office-research-planning

**Canvas Planning & Budget Course:**
http://tinyurl.com/MCCBPCourse