

# Tennessee Technological University

## Strategic Planning Reporting System

### How to Edit a Strategy

1. Please see [“How to Edit and Action Plan”](#) for instructions on how to navigate to the location in the Reporting System where Strategies can be edited.
  - a. **Please Note:** When selecting an Action Plan to edit you do not have to change any data to progress through the Reporting System.
2. Select the year associated with the strategy you wish to edit from the **“Select Plan Year to Edit/View”** field.
  - a. If you wish to select **“Add new Strategy”** from the **“Select a Plan Year to Edit/View”** field please see [“How to Add a Strategy”](#).

The screenshot shows the top navigation bar with the TTU logo and 'TENNESSEE TECH UNIVERSITY' on the left, and 'STRATEGIC PLANNING SYSTEM' on the right. Below the navigation bar are links: 'Return to Choose System', 'Return to Main', 'Logoff', 'TTU Strategic Planning Website', and 'Help'. The main content area displays 'Planning Years 2010-2015' and 'Goalkeeper TEST'. The goal is to increase the number of new and existing academic programs. The objective is to create new degree-granting programs. The action is a test only. Evaluation methods include Enrollment FTE (Target 82) and Enrollment Headcount (Target 100). A goalkeeper memo states 'This is a note!'.

*Your Action has been Saved.*

*If you would like to add a new Strategy to this Action, select "Add New Strategy" from the Plan Year dropdown list.*

*Choose a Plan Year and Strategy to Edit/View.*

The screenshot shows a dropdown menu for 'Select a Plan Year to Edit/View' with '2010-11' selected. Below it is a 'Select Strategy to Edit/View' dropdown menu with '1 - This is a test only' selected. A blue button labeled 'Add new Strategy' is visible at the bottom of the strategy dropdown.

3. Select the strategy you wish to edit from the list in the **“Select Strategy to Edit/View”** field. *(Only strategies associated with the year selected in Step 2 will be listed)*

The screenshot shows the same interface as the previous one, but with '2012-13' selected in the 'Select a Plan Year to Edit/View' dropdown. The 'Select Strategy to Edit/View' dropdown now shows '1 - This is a test only' as the only option.

*Your Action has been Saved.*

*If you would like to add a new Strategy to this Action, select "Add New Strategy" from the Plan Year dropdown list.*

*Choose a Plan Year and Strategy to Edit/View.*

The screenshot shows the 'Select a Plan Year to Edit/View' dropdown menu with '2012-13' selected. The 'Select Strategy to Edit/View' dropdown menu shows '1 - This is a test only' as the only option.

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4. Edit any relevant field associated with the new Strategy you wish to change.
  - a. A sequence number associated with the Strategy will be displayed but cannot be edited.
  - b. The current status of the Strategy will be displayed in the **“Status”** field. *This field can only be edited by the Strategic Planning Committee as either “Approved” or “Disapproved”*)
  - c. Any comment entered by the Strategic Planning Committee regarding the Strategy will be displayed in the **“Comments”** field. *(This field can only be edited by the Strategic Planning Committee)*
  - d. Edit the description or explanation of the Strategy in the **“Strategy”** field.
  - e. Revenues/ Cost Savings, Human Resources, Operating Costs, and Facilities
    - i. Edit any explanation of the revenue/cost in the **“Generic Memo”** field under the corresponding revenue/cost label.
    - ii. Edit any one time revenue/cost dollar amount in associated the **“One Time Dollar Amount”** field. *(Numerical values only – You may enter a zero if the dollar amount is unknown at the time of entry)*
    - iii. Edit any recurring revenue/cost dollar amount in associated the **“Recurring Dollar Amount”** field. *(Numerical values only – You may enter a zero if the dollar amount is unknown at the time of entry)*
    - iv. Edit the type of money the revenue/cost will be associated with by selecting either **“E&G, Grants/Restricted, Gifts, or Other.”** *(Only one type can be selected per revenue/cost section)*
    - v. If the **“Other”** money type was selected, enter a brief description in the **“Other”** field in the associated revenue/cost section.
  - f. Once you have completed all relevant fields, click the **“Submit”** button.
    - i. Clicking the **“Cancel”** button will return to Step 2 of this work instruction.
    - ii. Clicking the **“Cancel”** button will delete the associated Strategy.

The screenshot displays a web form for editing a strategy. At the top, there is a 'Strategy' field with a dropdown menu showing '1' and a 'Status and Comments' dropdown menu showing 'Pending'. Below these are two large text areas for 'This is a test only' and a blank area. The 'Net New Revenue/Net Cost Savings' section includes a 'Generic Memo' text area with 'bla', 'One Time Dollar Amount' (100), 'Recurring Dollar Amount' (0), and radio buttons for 'E&G', 'Grants/Restricted', 'Gifts', and 'Other' (selected). An 'Other:' text field is also present. The 'Human Resources' section has similar fields with 'One Time Dollar Amount' (0), 'Recurring Dollar Amount' (0), and radio buttons for 'E&G', 'Grants/Restricted', 'Gifts', and 'Other' (selected). An 'Other:' text field is also present.

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## Strategic Planning Reporting System

### Operating Costs

One Time Dollar Amount:

Recurring Dollar Amount:

Funding Source:

E&G  Grants/Restricted  Gifts  Other

Other:

### Facilities

One Time Dollar Amount:


Recurring Dollar Amount:

Funding Source:

E&G  Grants/Restricted  Gifts  Other

Other:

5. Once you have clicked the **“Submit”** button you should receive a **“Your Strategy has been updated in the database”** message.
  - a. Click the **“Here”** link in the phrase **“Click here to add or edit another Strategy for this Action”** to add or edit a Strategy for the same Action Plan.
  - b. Click the **“Return to Choose System”** button to return to the main menu (*Two Options: Strategic Planning Reporting System or Annual Report System*).
  - c. Click the **“Return to Main”** button to return back to the screen where you can select the planning cycle.
  - d. Click the **“Logoff”** button to exit the Strategic Planning Report System



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STRATEGIC PLANNING SYSTEM

[Return to Choose System](#) [Return to Main](#) [Logoff](#) [TTU Strategic Planning Website](#) [Help](#)

Planning Years 2010-2015  
Goalkeeper TEST

Your Strategy has been updated in the database.

Click [here](#) to add or edit another Strategy for this Action.