How to Add 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 added.
   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 “Add new Strategy” from the “Select Plan Year to Edit/View” field. (Step 2 is only relevant if a strategy is already associated with the action plan)
3. Select the year from the “Choose a Plan Year” field that you wish to associate a new Strategy with.
4. Complete each relevant field associated with the new Strategy.
   a. A sequence number will automatically be assigned to the Strategy.
   b. Enter a description or explanation of the Strategy into the “Strategy” field.
   c. Revenues, Human Resources, Operating Costs, and Facilities (At least one of these sections must be filled out for a Strategy to be valid in the Reporting System)
      i. Enter an explanation of the revenue/cost in the “Generic Memo” field under the corresponding revenue/cost label.
      ii. Enter any one time revenue/cost dollar amount in associated the “One Time Dollar Amount” field. (Numerical values only – You many enter a zero if the dollar amount is unknown at the time of entry)
      iii. Enter any recurring revenue/cost dollar amount in associated the “Recurring Dollar Amount” field. (Numerical values only – You many enter a zero if the dollar amount is unknown at the time of entry)
      iv. Select by clicking the type of money the revenue/cost will be associated with be 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.
   d. Once you have completed all relevant fields, click the “Submit” button.
      i. Clicking the “Cancel” button will return to the main menu (Two Options: Strategic Planning Reporting System or Annual Report System).
5. Once you have clicked the “Submit” button you should receive a “Your Strategy has been added to 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.