How to Edit an Action Plan

1. Login to the Strategic Planning Reporting System by entering your username into the “Goalkeeper Name” field, entering your password into the “Password” field, and clicking the “Login” button.

2. Click the “Strategic Planning Reporting System” button.
   a. Please Note: this screen in the system also displays a broadcast message that is used to communicate with the campus community. As you notice in this example the Strategic Planning Committee is asking all users of the system to review their dollar amounts and evaluation methods of their action plans.

3. Select the planning cycle associated with the action plan you wish to edit by making a selection from the drop down list located in the “Planning Years” field.
4. Select a current goal associated with the action plan you wish to edit by making a selection from the drop down list located in the “Goal” field.

5. Select a current objective associated with the action plan you wish to edit by making a selection from the drop down list located in the “Objective” field.

6. Select a current action you wish to edit by making a selection from the drop down list located in the “Action” field.
7. Click the “Edit/View an Existing Action” button to edit the selected action plan.
8. **Edit** the existing action plan.
   
   a. Enter any notes or alternate goalkeeper in the “Goalkeeper Memo” field.
   
   b. Select an evaluation method as a unit a measure for the action plan from the “Evaluation Method” drop down list.
   
   c. Enter a target to evaluate the action plan by entering a numeric value in the “Target” field.
   
   d. Select an alternate evaluation method as a 2nd unit a measure for the action plan from the “Alt Evaluation Method” drop down list.
   
   e. Enter a 2nd target to evaluate the action plan by entering a numeric value in the “Alt Target” field.
   
   f. Enter any alternate goalkeeper by selection an option from the “Alternate Goalkeeper” drop down list.
   
   g. Click the **Continue/Save** button to save the edited action plan.
      i. Clicking the **Cancel** button will cancel all changes to the action plan and return you back to the screen where you can select the planning cycle.
      ii. Clicking the **Delete This Action** button will delete the current Action Plan.
9. You have now edited the existing action plan to the Strategic Planning Reporting System and it will appear in summarized form in a gray shaded area. You will also receive a confirmation that the edited data has been saved. You can now do the following things:
   h. Click the “Return to Choose System” button to return to the main menu (Two Options: Strategic Planning Reporting System or Annual Report System).
   i. Click the “Return to Main” button to return back to the screen where you can select the planning cycle.
   j. Click the “Logoff” button to exit the Strategic Planning Report System.
   k. Add strategies associated with an action plan – see “How to Add a Strategy” or “How to Edit a Strategy”