SBCCD PPR Web Tool: The Basics, with Screen Samples

If you need any help with working with the SBCCD Offices PPR Web Tool, please contact Keith Wurtz at extension 4375.

1. Opening screen at www.sbccd.edu/programreview; click Log On at upper right. If you receive invalid certificate error message click on advanced and proceed.

2. Logon screen; enter district user name and password, and click the <Log On> button at the bottom.
3. Opening screen after logon, parts 1 and 2; shows editing and management rights and available submitted plans. I clicked on Test1 link in Direct Management section, so I can create a plan (as a unit leader would) on the next screen.
4. Opening screen for plan creation: Click on Create a New Annual Plan or Program Review if this is the first time a program review has been done in your area. If there is a prior plan, click on Create Annual Plan or Program Review by Copy.

5. Plan creation screen by copy, for unit leaders. Choose the plan you want to copy (usually the most recent plan), Plan Group and Type should default to one choice, then click the <Yes> button.
6. Back to the opening screen for plan creation or editing. The plan I just created now appears; I clicked on Edit Plan under it to begin filling in the plan on the next screen.

7. If the plan is not already locked, click Lock plan for editing on this screen, so that you can begin entering information. Or you can just scroll down to read the plan. When the plan is locked for editing, only the person who locked the plan can make changes. All other users with Direct Editing Rights can still access and read the plan.
8. Edit Tasks screen, parts 1 and 2 of many; this is your base for all editing and submission functions. I first clicked on *Edit texts for plan*. 

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**Planning & Program Review (WebForms)**

- **Plans for District Institutional Effectiveness, Research, & Planning >> 2015 - 2016 District Institutional Effectiveness, Research, & Planning District Program Review**

   This page is suitable for printing. Just use the print option in your browser or you can [print this page](#).

   - View Objective Priority List
   - View Goal Priority List
   - Submit Plan (Draft)
   - Submit Plan (Finalized)
   - Unlock plan
   - **Edit texts for plan**
   - Edit goals/objectives/resource requests/actions/activities for plan (Question #9)
   - Edit Progress Report goals/objectives/resource requests/actions/activities for plan (Question #10)
   - Attach Supporting Document(s) - Optional (Question #12)

   **Name:** 2015 - 2016 District Institutional Effectiveness, Research, & Planning District Program Review

   **Principal Preparer:** Keith Wurtz

   **Progress Report Preparer:** Keith Wurtz

   **Version:** 4

   **Group:** 2015 - 2016

   **Type:** District Program Review

   **Last Modified On:** 12/22/2015 2:45:01 PM

   **Last Modified By:** Keith Wurtz

   **State:** Locked for Editing

   **State By:** Keith Wurtz

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**Instructions**
9. The Edit Texts screen is where you create or edit most sections of the plan, either by cutting and pasting or by direct entry. The rudimentary word processor works best with straight text or outlines, not tables or graphics. Start by entering the principal preparer’s name, and go section by section from there.

When you have finished editing for the time being, be sure to click on the <Save> button. After a moment, “Plan Updated” will appear in green type at the top of the Edit Texts screen. Now you may continue entering or editing information here, or go back to Screen 8 to do other tasks by clicking on the name of your plan at the top of the screen—in this case, it’s 2015 – 2016 District Institutional Effectiveness, Research, & Planning District Program Review.
10. Now I have clicked on Attach supporting document(s) – Optional (Question 12) on Screen 8. This is where you attach documents that are too long or complex to cut and paste directly into the section windows. Just click the <Choose Files> button to find your file, select it, and click <Submit>; repeat the process for each file you wish to attach. Be sure to refer to the attached document in the applicable section of your plan.

11. Now I have clicked on Edit goals/objectives/resource requests/actions/activities for plan (Question 9) on Screen 8. You’ll work on all goals, objectives, and activities from here. If you have copied a plan you can click on any goal, objective, action, or resource to edit the goal. You can also move, delete, or add any goal, objective, action, or resource by clicking on the icons (e.g. “+” will add an objective).
12. Now I have clicked on *Add Goal* on Screen 11, and have entered the name and description of a goal here, with a priority rank of 3 (Remember goals are very broad and will most likely stay the same from year-to-year). You can change both the order of appearance and the priority rank later if you wish, but entering the goals in priority order from the beginning makes the process easier. Click *<Save>* when you’re done with this goal, and you’ll go back to Screen 11.

![Planning & Program Review (WebForms)](image)

13. Now the goal is listed, and you can click on it to edit it if you wish. Click on the little plus (+) sign to its right to add objectives.

![Planning & Program Review (WebForms)](image)


- a. Goals (with priority rank) over the next three years
- b. Objectives (with priority rank) under each Goal
- c. Principal Activities under each Objective, if available
- d. Timeline for completion of each Activity or Objective
- e. Person responsible for ensuring completion of each Activity or Objective
- f. Progress on or achievement of a given Goal or Objective does not necessarily require additional resources. For Goals and Objectives that do require resources, enter the following information:
  - i. Resources required to achieve Goals and Objectives over the next three years, with description and rationale for each
  - ii. Identification of associated Goals or Objectives
  - iii. Type of Resource
    - i. Expenditure Category
    - ii. One-time/Ongoing
  - iv. Estimated annual cost (or savings) for the next three years

- 1 Goal: *Promote Evidence-Based Decision Making* (Priority: 3)
14. I have named and described the objective, and assigned an overall priority, timeline, and responsible person to it. All the fields shown must be filled in for each objective. Don’t worry about precise dates at this point; just pick a month to start, and an end month that represents a reasonable amount of time to reach the objective. (NOTE: The strategic directions will be changed to District Strategic Goals, Institutional Learning Outcomes will be removed, and the impact level categories are in the process of being changed.) Be sure to click <Save>.
15. Now the objective is listed under the goal, and you can click on it to edit it if you wish. Click on *Add Action/Activity* to its right to add specific activities, which are optional but helpful in organizing the work on the objective.

16. I have named and described the activity, and assigned a timeline and responsible person to it. All fields are optional. Be sure to click *Save*.
17. Now the activity is listed under the objective, and you can click on it to edit it if you wish.
18. Here I have added another goal and another objective under one of them. Note the little arrows that now appear to the right of each goal and objective. Use those arrows to change the order in which the goals and objectives are listed. Changing the order of appearance does not change the priority of the goal or objective.

- 1 - Goal - **Promote Evidence-Based Decision Making** (Priority: 1)  
  - 1.1 - Objective - Increase access to data by continuing to collaboratively work with all District employees to develop Informer reports and dashboards. (Priority: 1)  
    - Actions/Activities:
      - 1.1.a1 - **Develop IEPI dashboards**

- 2 - Goal - **Promote Student Success** (Priority: 2)
19. Here I have clicked on Add Resource Request back on Screen 15. You can add as many resources as you need for each objective. The name is the actually resource request. You can provide a description and rationale to help justify the request; however, these are optional. You are required to enter a resource type, category, and estimated cost for the resource request. Enter each resource request separately. Be sure to click <Save>.
20. Now the new resource request appears next to the objective, and you can click on it to edit it if you wish.
21. Here I have clicked on View Objective Priority List on Screen 8 so that I can review and easily prioritize the objectives. If I want to change number 2 to number 1, just click on number 2 and type one or you can click on the arrows to move the objectives up or down. If I click on Details, a box will expand to show the associated information.
22. The last step in submitting a plan is to click on *Submit Plan (Finalized)* on Screen 8, the final step in the process for each unit. If you need to change something after finalizing a plan, you can reopen the plan by clicking on *Reopen*.

23. After all the departments within an area like TESS have submitted their finalized plans, the Area manager clicks the applicable Area name (in this case, “TESS”) under Direct Management Entities on Screen 3, then *Create Plan* on the Division equivalent of Screen 4. That brings up this screen, which permits the roll-up of the goals, objectives, activities, and resource requests in multiple unit plans (the “children”) into a single Area plan. That plan can then be edited as needed to set overall Area priorities.