

Quick Guide for Displaying Sections in a Plan

The user will be presented with options that they wish to include in the PDF. These PDFs will not be saved in ASSIST. The user can view, download and/or print the plan.

Portfolio Profile Diagnostics & Surveys Assurances **Goals & Plans** Reviews Progress

View Plan

Name
test

Comments
test

Goal thread(s) included in Plan

Goal	test demo
Objective	A total of 30 All Students will achieve colleg...
Strategy	strategy7
Activity	activity 3 (Type(s): Class Size Reduction, Community Engagement; Dates: 9/16/15-9/22/15)
Strategy	Strategy Two Name
Activity	Activity for strategy 2 (Type(s): Class Size Reduction, Career Preparation/Orientation; Dates: 9/18/15-10/2/15)

** Indicates that the goal has been archived*

In addition to the Goals, Objectives and Strategies, include the following sections in the report:

Progress Notes

Research Cited for Strategy

Activities

Activity Summary by funding source

PDF Edit Plan Cancel

The user will be able to select one or multiple options to include in the PDF.

1. **Progress Notes** – If the **Progress Notes** originally were not included in a saved/new plan, the checkbox automatically will be unchecked. If they were included, they automatically will be checked.
2. **Research Cited for Strategy**- Due to the length of research that some institutions enter, the user will have the option to view or print the PDF without this section.
3. **Activities** - The report always will contain goals, objectives and strategies. All activities will be excluded if unchecked.
4. **Activity Summary by funding source** section - The PDF will not contain this section if unchecked.