Unit Strategic Planning With Insight 2.0:
Lesson 2: User Registration

In Lesson 2, you will learn how to request Insight 2.0 user access to your strategic plan. Insight 2.0 uses UVU’s Single Sign-On system to give users access to the planning user portal using the same credentials used to login to the campus network and MyUVU. However, users must be associated with accreditation standards, program assessments, and strategic plans created in Insight 2.0 in order to use the system. The user registration process provides the information needed to assign users. By requesting user access to Insight 2.0 for the right people in the right roles, you will be able to build an effective strategic planning team.

USER REGISTRATION FORM

Insight 2.0 users are registered using a request form available at http://bit.ly/insightuser. The form provides the necessary information for Institutional Effectiveness and Planning to assign users to roles and plans.

Step 1: User Information
Complete the requested information about the faculty or staff member who will be using the account. The Job Category field is used to assign users to roles within the Insight 2.0 planning and assessment modules. To select a job category click on the appropriate one. It will turn from grey to green to indicate it has been selected.

Employees should be classified as both if they are:

- Employees classified as “staff” under UVU job categories who sometimes teach.
- Faculty who have administrative responsibilities, either as academic administrators or under reassigned time.

This will allow them to be assigned to roles in both modules.
Step 2: Accreditation Roles
Choosing an accreditation role gives you the access you need to contribute to the NWCCU accreditation self-study. Select accreditation roles to build a team for a standard. There are two roles for accreditation users:

- Responsible Leaders coordinate responses to one or more agency accreditation standards. They have the ability to review, edit, and finalize responses to accreditation standards, and can assign users to contribute content to the responses. Only the responsible leader can incorporate the contributions into the response. This role cannot be delegated to other faculty or staff members, including administrative assistants. Leaders are assigned to standards by the Accreditation Executive Team.

- Accreditation Standard Contributors provide content that will be integrated into responses to one or more agency accreditation standards by responsible leaders. Contributors are assigned to standards by the assigned responsible leader for each standard.

Responsible leaders can build teams by completing requests for those who need to contribute to their assigned standards. Requests can also be submitted by the users following assignment by leaders or the Accreditation Executive Team.

Employees not involved in accreditation should select "No Accreditation Role."

Step 3: Planning Roles
Choosing a planning role gives you access to the plans you work with. Select planning roles to build teams for strategic plans. There are two roles for planning users:

- Unit Leaders are responsible for coordinating the planning process for their units. They have access to their own unit's plans and to subordinate unit plans for review and approval. Each unit must have a designated unit leader.

- Planning Contributors provide content for their own unit plans and/or are responsible for entering plans into Insight 2.0. They do not have access to plans for subordinate units.

Unit leaders can build teams by completing requests for those who need to contribute to their organizations' plans or for the leaders of subordinate units. Requests can also be submitted by the users following assignment by unit leaders.

Employees not involved in planning should select "No Planning Role."
Step 4: Planning Units
Employees involved in unit strategic planning should identify the unit for which they will be planning. First select the division, then the specific department, office, or other unit. Users who need to be assigned to more than one unit plan will need to submit a separate request for each plan. If a unit is not listed, please contact Corey Leano-Peel in Institutional Effectiveness and Planning at corey.peel@uvu.edu or x8259.

Requestor, Verification, Processing
The final steps before submitting your request are to:

- Complete the requestor information if you are requesting an account for someone else.
- Verify that the information shown is correct.

User requests will be processed by Institutional Effectiveness and Planning, usually within two business days. You should receive a confirmation email when you submit your request and another when your account is ready to use. If you do not or have other questions, contact Corey Leano-Peel in Institutional Effectiveness and Planning at corey.peel@uvu.edu or x8259.