UNIVERSITY OF WEST GEORGIA

Xitracs User Manual:

Blueprints and Annual Reports

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Logging into Xitracs Portal

Log into the Xitracs Portal with the UWG ID and password through single sign-on:
https://xitracs.westga.edu

You can also access the Xitracs login page via the Xitracs Resources page found on the Institutional Effectiveness and Assessment website here,
https://www.westga.edu/administration/vpaa/iea/xitracs.php

If you are having trouble logging into the system, please contact Amanda Thomas at amandat@westga.edu

Accessing Your Blueprints

You will arrive at the homepage when you first log into the Portal. Here, you will see a welcome message that includes information about assessment reporting expectations and a few helpful links.

To access the list of Blueprints for which you are assigned, you can either click *View* under *My Open Activities* <u>OR</u> use the Plans tab in the blue navigation bar at the top.

Roles

There are three types of User Roles for Blueprints:

- An *Editor* has the ability to input and edit content (i.e. write and edit the Blueprint Report).
- A *Reviewer* can only view information and provide feedback using the *Comments* function.
- A *Viewer* can only view reports in progress.

If you believe that you should have access to additional Blueprints that do not appear on your list, or if there is a Blueprint listed that is not under your purview, please contact Amanda Thomas at amandat@westga.edu.

Opening the Blueprint

Find the current reporting cycle and click on the header bar of the Blueprint you wish to open, and then "Open."
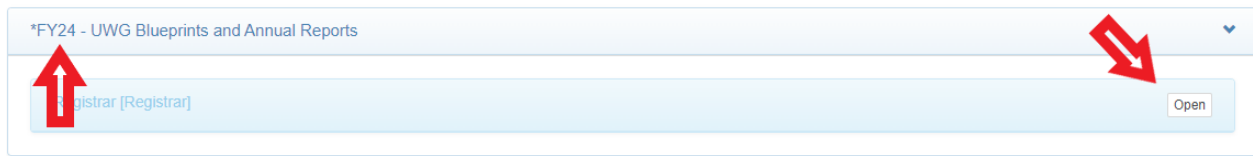
This will open the Unit level view. Here you will be able to see all Unit Goals being reported on this Cycle.

Entering Content into Your Blueprint

This section will define and explain the different functions available in a Blueprints report.

If you are opening and creating a report for the first time, you will not have any content to view. For information on starting a new reporting cycle, see the section below, Starting a New Reporting Cycle.

Goal Header Bar

The Header Bar includes a few useful tools along with the selected Goal.

View PDF

This button allows you to generate a PDF report of all Goals and subsequent fields that have been entered for your unit.

Edit

This button allows you to edit the Goal currently selected.

Link

The *Link* button allows units to link the Blueprint Goals to the Institutional Scorecard and UWG Strategic Plan. NOTE: ALL Goals should be linked to the Strategic Plan and/or the Institutional Scorecard.

Delete

The *Delete* button will delete the Goal currently selected.

Finish

The *Finish* button is for when you have achieved/completed or decided to no longer report on this Goal. You can still edit the Goal and subsequent fields during the current reporting cycle, but will not be available for future reporting.

Close

The *Close* button will close out the current Goal view and take you back to the Unit level view.

Show All

The *Show All* button expands/collapses content for all fields for easy viewing.

How to Add & Edit Report Content

The Blueprint template itself is broken down into fields or sections of the report and is built off of the Goals you create. Once created, you see the subsequent fields in an outline format.

Click anywhere on the field header to expand it and see your editing options. Each field has its own set of parameters and available functionality. Once open, any existing field content will be visible, together with available links as follows:
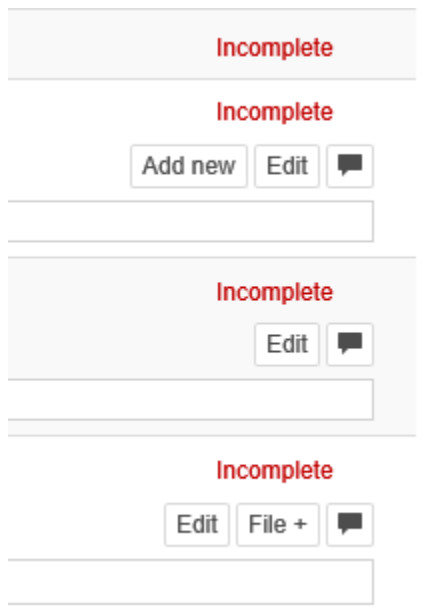
Add new

The *Add new* button appears if the field parameters allow an additional field of the same type to be created (i.e., add Actions/Tasks for the same Goal)> If the field has dependent or 'child' fields, these will also be added automatically.

Edit

Click the *Edit* button to edit/update the response for a field. Most fields have a rich text editor available. Please note that formatting may not transfer if copying and pasting from Word or PDFs.

While in the *Edit* window, in the bottom right-hand corner, you will see the option:
Complete (Select once you have completed filling out this part of the report.)

Once marked complete, the field will change to green and be displayed as completed on the progress bar and the field set view. *Pro Tip: Do not mark it as complete until data and/or information has been added.*

*Please note that marking a field as complete only means that you have filled in this part of the report.

File+

The *File+* button allows for programs to attach files to be included as part of the report. (i.e. raw data, tools, reports, etc.)

(Comment)

Click the text box icon to add a comment to the field.

Report Content Descriptions

Below is some guidance about what is expected for each field in the assessment report.

90 Day Priorities/Projects

What objectives does the unit hope to achieve during the reported 90 days to contribute to the annual goal?

Actions/Tasks

What specific tasks/actions will your unit take during the reported 90 days to achieve the 90-day objective?

Person Responsible and Collaborating Offices

For each 90 Day Priority/Project, list any individuals who will be responsible for overseeing the completion of the priority/project. Include any offices/units you may be working with as well.

Quarter __ Update/Summary

For each quarter, provide an update and summary of the progress and status of the connected 90 Day Priority/Project.

Annual Measurable Goals

Annual goals are redefined to be measurable. This may mean the Annual Goal is broken down into multiple Measurable Goals.

KPIs/Lead Metrics

What are the key factors and measures you will use to assess whether you have successfully met your objectives for this 90-day sprint?

Results

For each Annual Measurable Goal, report the data collected. This format should match the KPI/Lead Metric described above.

Status: Green, Yellow, Red

Select one of the options provided to describe the results presented for the outcome.
- Green
- Yellow
- Red

Annual Executive Summary

For each Unit Goal, summarize the unit's progress towards achieving the goal. Describe any important events, decisions, metrics, etc. Provide a brief data analysis describing what it means to the Unit and how you will use the data to inform decision-making, including any budgetary decisions.

Plans for Next Year

Based on a review and analysis, describe any actions the unit plans to take to improve the reported Goals.

Starting a New Blueprint and/or Goal

Blueprints run on a fiscal calendar, July 1 - June 30. For each cycle, you will first need to create goals so that the Blueprint template can be populated for you to complete. Please follow the instructions below.

*Please follow the same instructions whenever you wish to add a new goal to your unit.

1. After you log in to the Xitracs system, click the Plans tab at the top or "Open" in the My Open Activities box in the upper right corner.
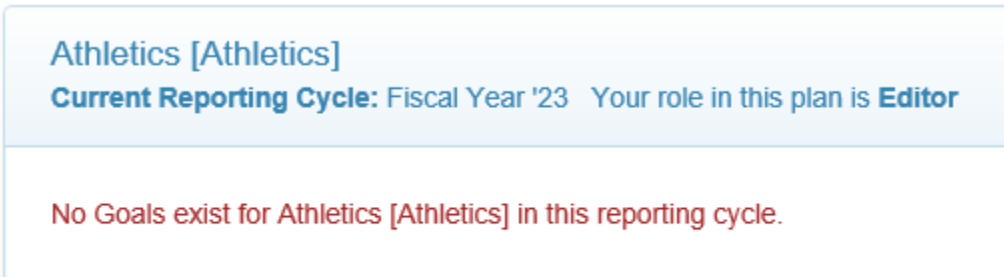

2. Find the current reporting cycle and click on the header bar of the Blueprint you wish to open, and then "Open."

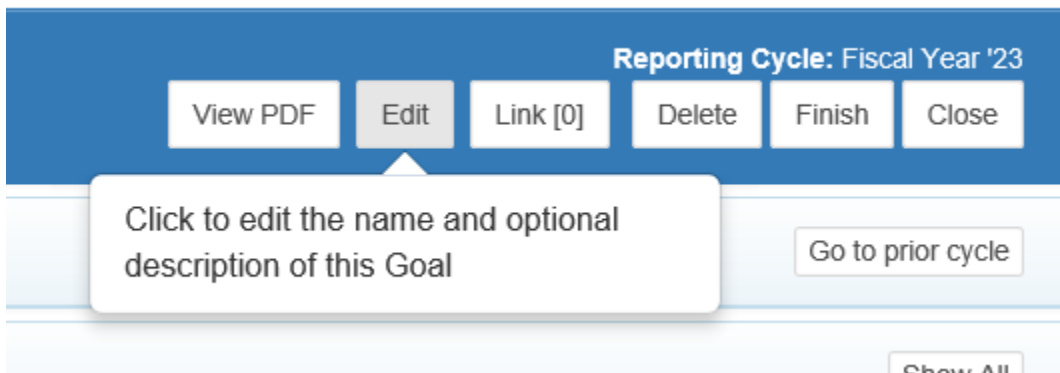This will open the Unit level view. Here you will be able to see all Unit Goals being reported on this Cycle.

3. Once in the correct Unit, you will see in red text, "No Goals exist for <insert your unit name> in this reporting cycle."

Athletics [Athletics]
Current Reporting Cycle: Fiscal Year '23   Your role in this plan is **Editor**

No Goals exist for Athletics [Athletics] in this reporting cycle.

4. Click *Add Goal* in the unit Header Bar. This will generate a field set for the Goal.

| Narrative | Add Goal | View Finished | View PDF | Close |

Click to add a new Goal.
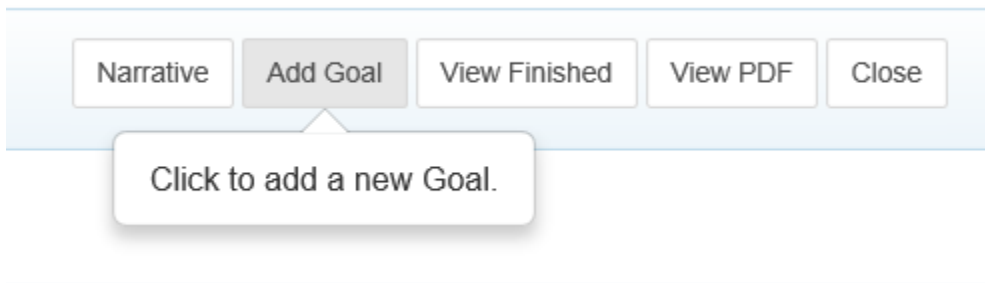
5. After generating the fieldset, you will need to click the *Edit* button and enter your Goal.

Reporting Cycle: Fiscal Year '23

| View PDF | Edit | Link [0] | Delete | Finish | Close |

Click to edit the name and optional description of this Goal

Go to prior cycle

Show All

6. You can modify the Short Name, though it is not required. The full Goal will go into the text editing space.

Goal Athletics-G001   ×

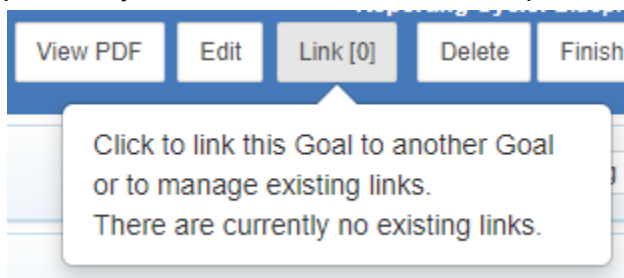**Goal Short Name (max 60 characters)**

Goal #001

Position

1   ▾

Goal Description

| Paragraph ▾ | Verdana ▾ | 11pt ▾ | A ▾ | A ▾ | ⊞ ▾ | <> |

| **B** | *I* | U | ≡ | ≡ | ≡ | ≡ | ✂ | ⎘ | 📋 | ☰ ▾ | ☰ ▾ | ≣ | ≣ | ↶ | ↷ |

Save   Cancel

7. Next, you will need to "Link" each goal to the Strategic Plan and/or the Institutional Scorecard. This is done by clicking the "Link" button to the right of the "Edit" button you previously clicked to edit the Goal description.

| View PDF | Edit | Link [0] | Delete | Finish |

Click to link this Goal to another Goal or to manage existing links.
There are currently no existing links.

8. To the right, you will see a button, "Add New Link." Click this button.

9. The next page has three steps for you to complete to link the current goal.
   a. "1. Select the plan you want to link to" - from the dropdown, select one of the three options: Categories, Institutional Scorecard, or Strategic Plan 2021-2026
   b. "2. Select the type of link from this plan" - it is recommended that you leave this as "All fields."
   c. "3. Select an available goal in the target plan" - choose one or more of the options that best align with your unit's current goal. Then click "Save" at the bottom.

Please note if you want to link to more than one plan from the first dropdown menu, you will need to save your selections for the first set before going back and linking to the next plan in the dropdown menu.

10. You are now ready to fill in the rest of your Blueprint for this Goal. Click on each row so that it will expand and show you the editing options. Refer to the Report Content Descriptions above for more information on what goes in each field.

11. After entering the required information for each field, make sure to mark it as "Complete." This will turn the row green to indicate that portion of the report has been entered.

Note: While in the Blueprint template, if you select the "Close" button at the top right corner, you will be taken back to the main page for the Unit where all the unit goals can be seen.

Finishing a Goal

1. While working in the <u>current</u> reporting cycle, you will have a "Finish" button available to you for each Goal. If your Unit has decided that you have fully achieved a goal or you no longer wish to continue working on it, you can decide to finish (close-out) the goal. The goal and any other Blueprint information will still be available to review, but it will no longer appear as an "active" goal.
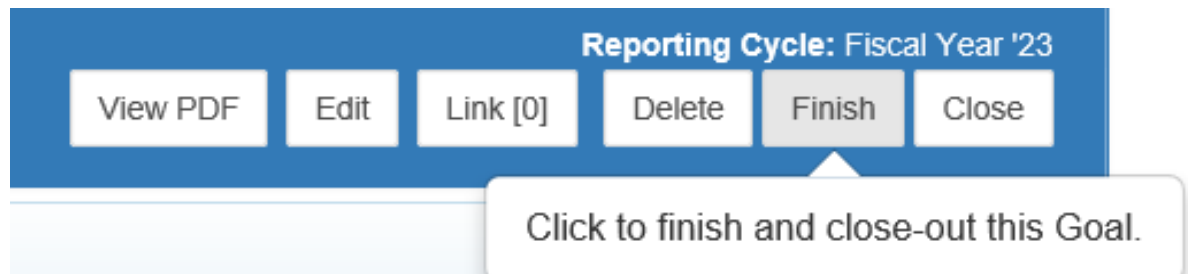
2. You will be prompted to confirm your selection if you click the "Finish" button. *Please note that you will have the option to Reactivate this goal during this reporting cycle*.
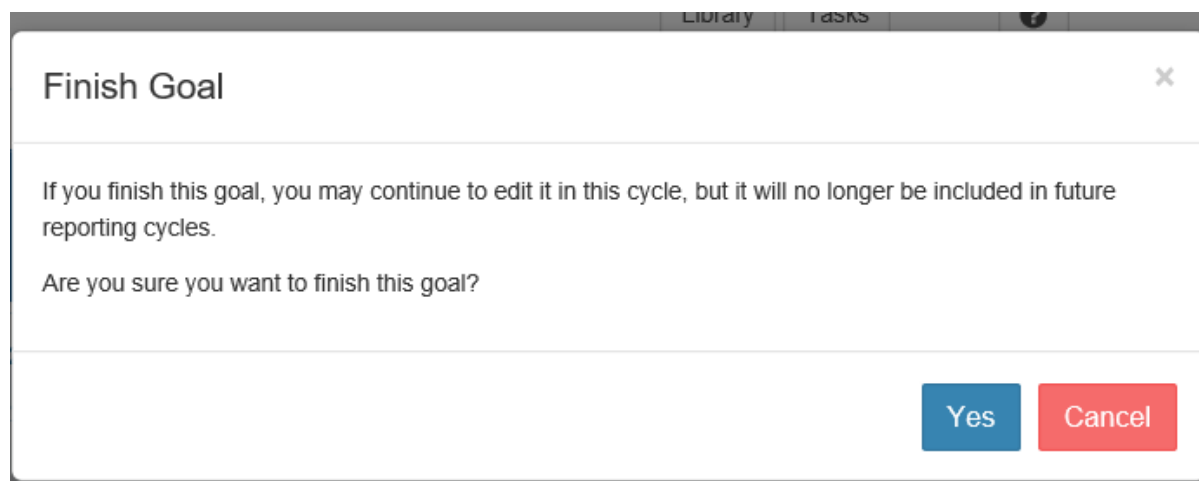
3. Any goals that you choose to Finish will continue to be visible in your list of Goals during this reporting cycle, but they are marked as "Finished" and not "Active."
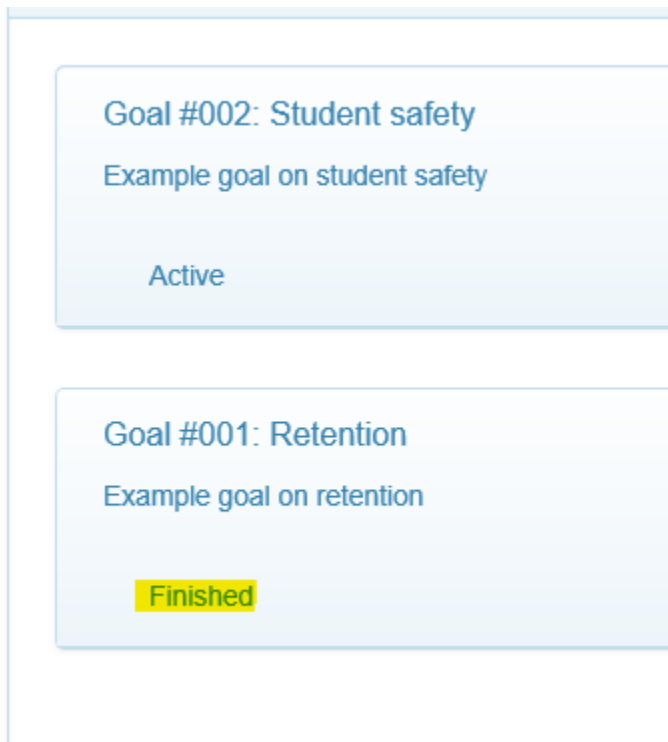
Viewing Prior Blueprints / Goals

At the end of each reporting cycle, all goals are closed out/finished for the year. To view prior goals and Blueprints, please follow the instructions below.

1. After you log in to the Xitracs system, click the Plans tab at the top or "Open" in the My Open Activities box in the upper right corner.

2. Find the row that lists desired reporting cycle and click on the header bar of the Blueprint you wish to open, and then "Open."

This will open the Unit level view. Here you will be able to see all Unit Goals previously reported.

3. If you click on "View Goal" for any of the displayed goals, you will be taken to the Blueprint template for the FY23 reporting cycle.
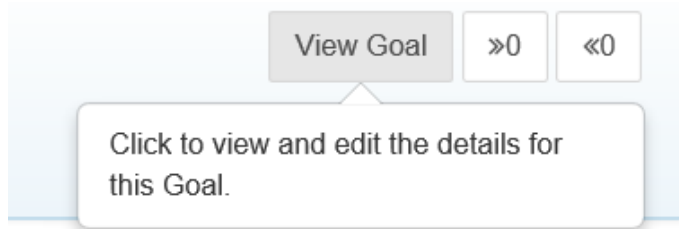
If the goals were reported on in FY23, all information entered will be visible for you to review.

For any goal that was reported on in FY22, you will need to contact Amanda Thomas, amandat@westga.edu and ask for a copy of the FY22 Blueprint for your unit. This includes any goals labeled with "FINISHED FY22" at the beginning of the Goal name.

For any issues, questions, or requests for additional training with Xitracs, please contact Amanda Thomas at amandat@westga.edu.