



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](mailto: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* OR use the *Plans* tab in the blue navigation bar at the top.

**UNIVERSITY OF WEST GEORGIA**

Home Agencies **Plans** Programs Surveys Logout

Amanda Thomas Library Tasks ? Xitracs™

Welcome Amanda Thomas to your Xitracs Portal™

Welcome,

This site has been developed as a tool for faculty and staff to aid in the reporting and planning of assessment and accreditation activities at UWG. Depending on your user role, you will have the ability to access, edit, and/or comment on various reports and tools throughout the system.

- The "Agencies" tab is used for accreditation, compliance, and periodic review reports when applicable.
- The "Plans" tab is for Blueprint reporting.
- The "Programs" tab is where academic programs and general educational core area programs submit assessment reports. If you are assigned as an assessor, you will be able to edit the fields. Peer reviewers cannot edit fields but are able to add comments.
  - All annual assessment reports should include only the data collected during the identified reporting cycle.
  - All academic program assessment reports are due by November 15th each year.
- The "Surveys" tab is for a variety of survey types that may be sent out for data collection purposes.
- If you are here to score General Education artifacts, you will have box in the right-hand corner of your screen titled, "My Open Assessment Tasks." Click on the box "Task List" to find the artifacts you have been assigned.

**My Open Activities**

You have 5 plan sections that require your input.  
You have 3 program reports that require your input.

**My Open Assessment Tasks**

Task Name	Due Date	Action
TEST [Scoring]	Due: 7/27/21	Info
Gen Ed Artifact Scoring [Scoring]	Due: 4/24/21	Info
Import test [Scoring]	Due: 11/23/20	Info

## Roles

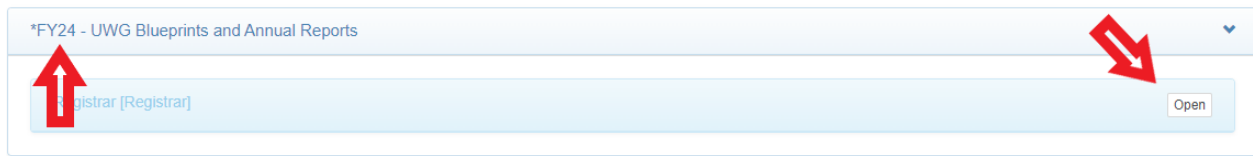
There are three types of User Roles for Blueprints:

- 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](mailto: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 screenshot displays the University of West Georgia XitracS interface. At the top left is the UWG logo with the text "GO WEST UNIVERSITY OF WEST GEORGIA". A navigation bar contains links for Home, Agencies, Plans, Programs, and Surveys, along with a Logout button. Below this is a user profile for Amanda Thomas with buttons for Library, Tasks, and a help icon. A "Click to view your details." tooltip is visible. The main header bar shows "Career Services [Career Services] Active" and "Goal #001" with the role "Editor". It includes buttons for "View PDF", "Edit", "Link [0]", "Delete", "Finish", and "Close", and a "Reporting Cycle: Fiscal Year" dropdown. Below the header is a table titled "Reporting fields for Goal #001" with a "Show All" button. The table lists various reporting fields, all of which are currently "Incomplete".

Reporting fields for Goal #001	Status
1 90 Day Priorities/Projects	Incomplete
1.1 Actions/Tasks	Incomplete
1.2 Person Responsible and Collaborating Offices	Incomplete
1.3 Quarter 1 Update/Summary	Incomplete
1.4 Quarter 2 Update/Summary	Incomplete
1.5 Quarter 3 Update/Summary	Incomplete
1.6 Quarter 4 Update/Summary	Incomplete
2 Annual Measurable Goals	Incomplete
2.1 KPIs/Lead Metrics	Incomplete
2.1.1 Results	Incomplete
2.1.2 Status: Green, Yellow, Red	Incomplete
3 Annual Executive Summary	Incomplete
4 Plans for Next Year	Incomplete

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.

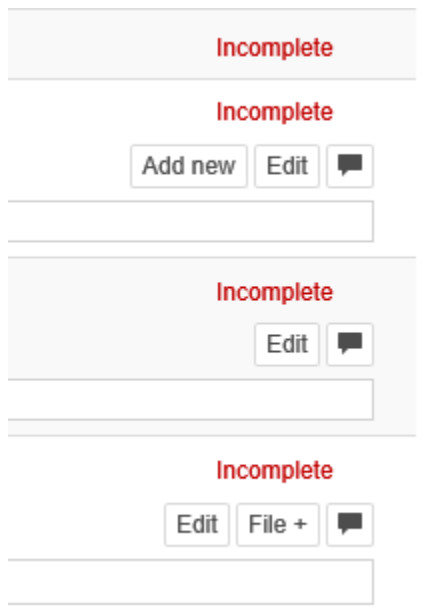
## Show All

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.

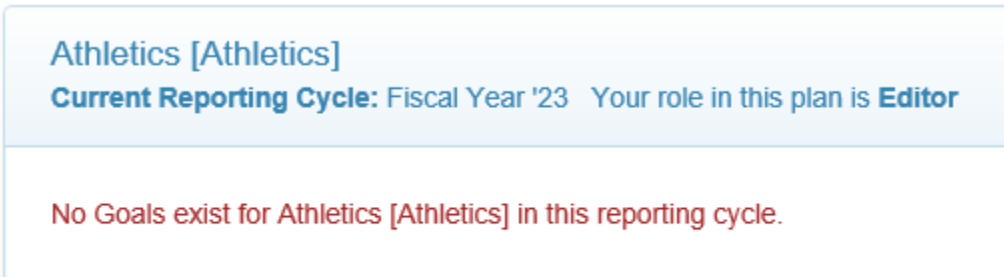
The screenshot shows the Xitracs system interface for user Amanda Thomas. The top navigation bar includes 'Home', 'Agencies', 'Plans', 'Programs', and 'Surveys'. A red arrow points to the 'Plans' tab. Below the navigation bar, there is a welcome message and a list of open activities. The 'My Open Activities' section shows 5 plan sections and 3 program reports that require input, with 'View' buttons. The 'My Open Assessment Tasks' section shows a list of tasks with due dates: TEST [Scoring] (Due: 7/27/21), Gen Ed Artifact Scoring [Scoring] (Due: 4/24/21), and Import test [Scoring] (Due: 11/23/20). A red arrow points to the 'View' button in the 'My Open Activities' section.

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

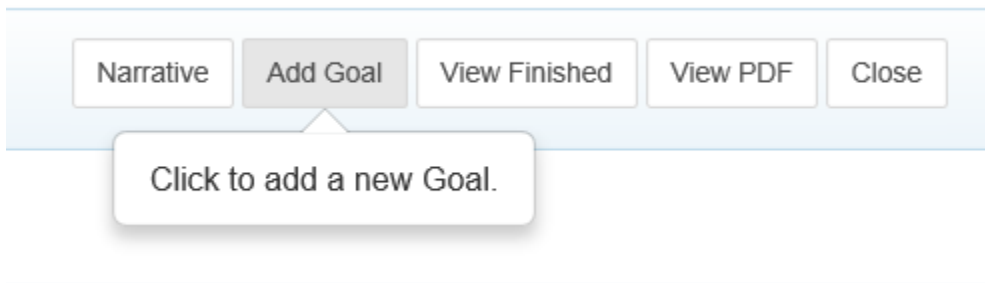
The screenshot shows the header bar for the 'FY24 - UWG Blueprints and Annual Reports' section. A red arrow points to the 'Open' button in the bottom right corner of the header bar.

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

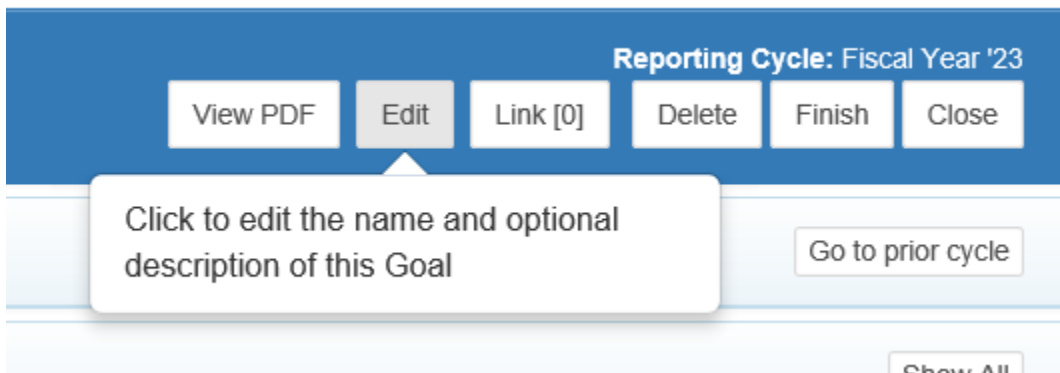
3. Once in the correct Unit, you will see in red text, “No Goals exist for <insert your unit name> in this reporting cycle.”



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



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



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

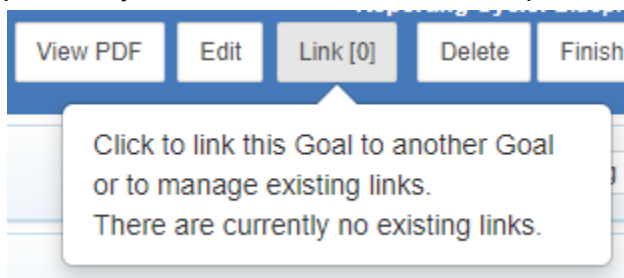
Goal Description

Paragraph Verdana 11pt A A

**B** *I* U [Text Alignment Icons] [List Icons] [Link/Unlink Icons] [Undo/Redo Icons]

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.



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.

Goal #001

**1** Select the plan you want to link to

Strategic Plan 2021-2026

**2** Select the type of link from this plan

All fields   
  Field
 

1 90 Day Priorities/Projects ▼

**3** Select an available goal in the target plan

Priority 1 - Relevance	
<input checked="" type="checkbox"/>	Relevance - Goal 1 Update existing programs and develop new programs to engage students in 21st century learning.
<input type="checkbox"/>	Relevance - Goal 2 Launch or advance each students' career before graduation by ensuring they work on at least one project.
<input type="checkbox"/>	Relevance - Goal 3 Elevate ALL students' professional, cultural, and global competencies via cocurricular experiences.
<input type="checkbox"/>	Relevance - Goal 4 Leverage the geography of UWG to be an economic and intellectual engine for companies, organizations, and partnerships.
<input type="checkbox"/>	Relevance - Goal 5 Define pathways to post-graduation through an institutional commitment to elevating and advancing student success and community-based networking for all students.
Priority 2 - Competitiveness	
<input checked="" type="checkbox"/>	Competitiveness - Goal 1 Elevate institutional visibility and reputation by promoting the successes and contributions of the institution.
<input type="checkbox"/>	Competitiveness - Goal 2 Be distinct — design distinctive, world-class experiences inside and outside the classroom.

*\*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.*

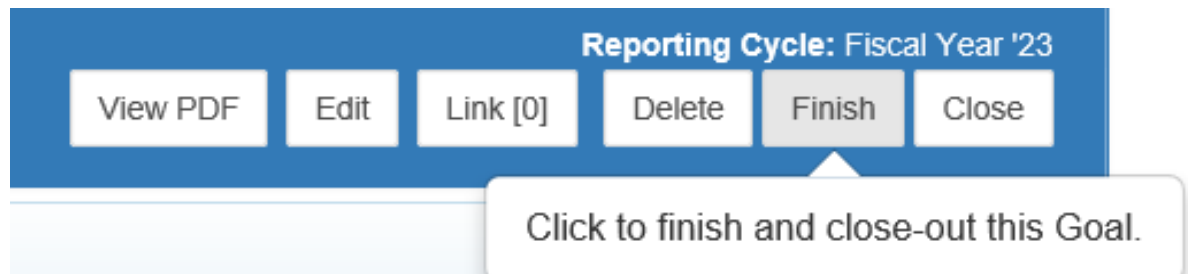
10. You are now ready to fill in the rest of your Blueprint for this Goal. Click on each row so that it will expand and show you the editing options. Refer to the [Report Content Descriptions](#) above for more information on what goes in each field.

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.

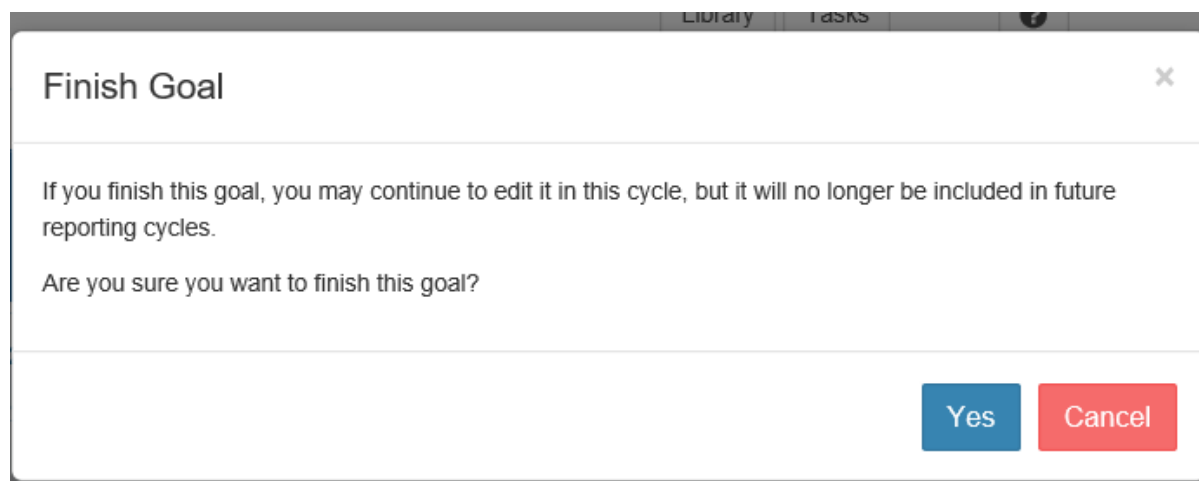
Note: While in the Blueprint template, if you select the “Close” button at the top right corner, you will be taken back to the main page for the Unit where all the unit goals can be seen.

## Finishing a Goal

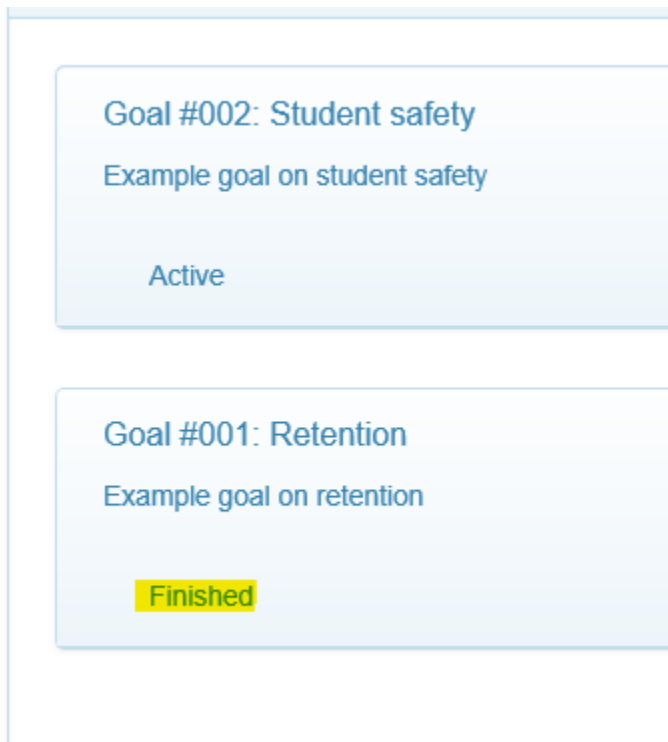
1. While working in the current reporting cycle, you will have a “Finish” button available to you for each Goal. If your Unit has decided that you have fully achieved a goal or you no longer wish to continue working on it, you can decide to finish (close-out) the goal. The goal and any other Blueprint 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.



Home Agencies **Plans** Programs Surveys Logout

Amanda Thomas Library Tasks ? Xitrac<sup>SM</sup>

Welcome Amanda Thomas to your Xitrac<sup>SM</sup> Portal™

Welcome,

This site has been developed as a tool for faculty and staff to aid in the reporting and planning of assessment and accreditation activities at UWG. Depending on your user role, you will have the ability to access, edit, and/or comment on various reports and tools throughout the system.

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- If you are here to score General Education artifacts, you will have a box in the right-hand corner of your screen titled, "My Open Assessment Tasks." Click on the box "Task List" to find the artifacts you have been assigned.

**My Open Activities**

You have 5 plan sections that require your input.  
You have 3 program reports that require your input.

View  
View

**My Open Assessment Tasks** Task list

TEST [Scoring]	Due: 7/27/21	Info
Gen Ed Artifact Scoring [Scoring]	Due: 4/24/21	Info
Import test [Scoring]	Due: 11/23/20	Info

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."

\*FY24 - UWG Blueprints and Annual Reports

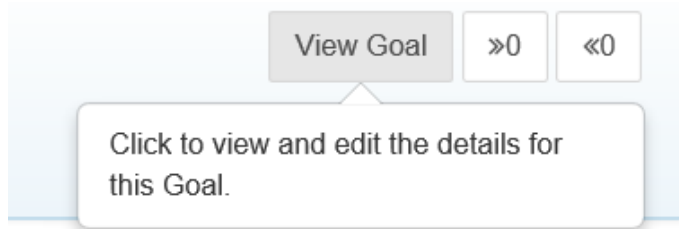
College of Arts, Culture, and Scientific Inquiry [CACSI] Open

FY22 & FY23 - UWG Blueprints and Annual Reports - Academic Affairs

College of Arts, Culture, & Scientific Inquiry [CACSI] [Viewer] 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](mailto: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](mailto:amandat@westga.edu).