UNIVERSITY OF WEST GEORGIA

Xitracs User Manual:

Blueprint and Annual Report

**This manual is still in Draft and changes should be expected.*

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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

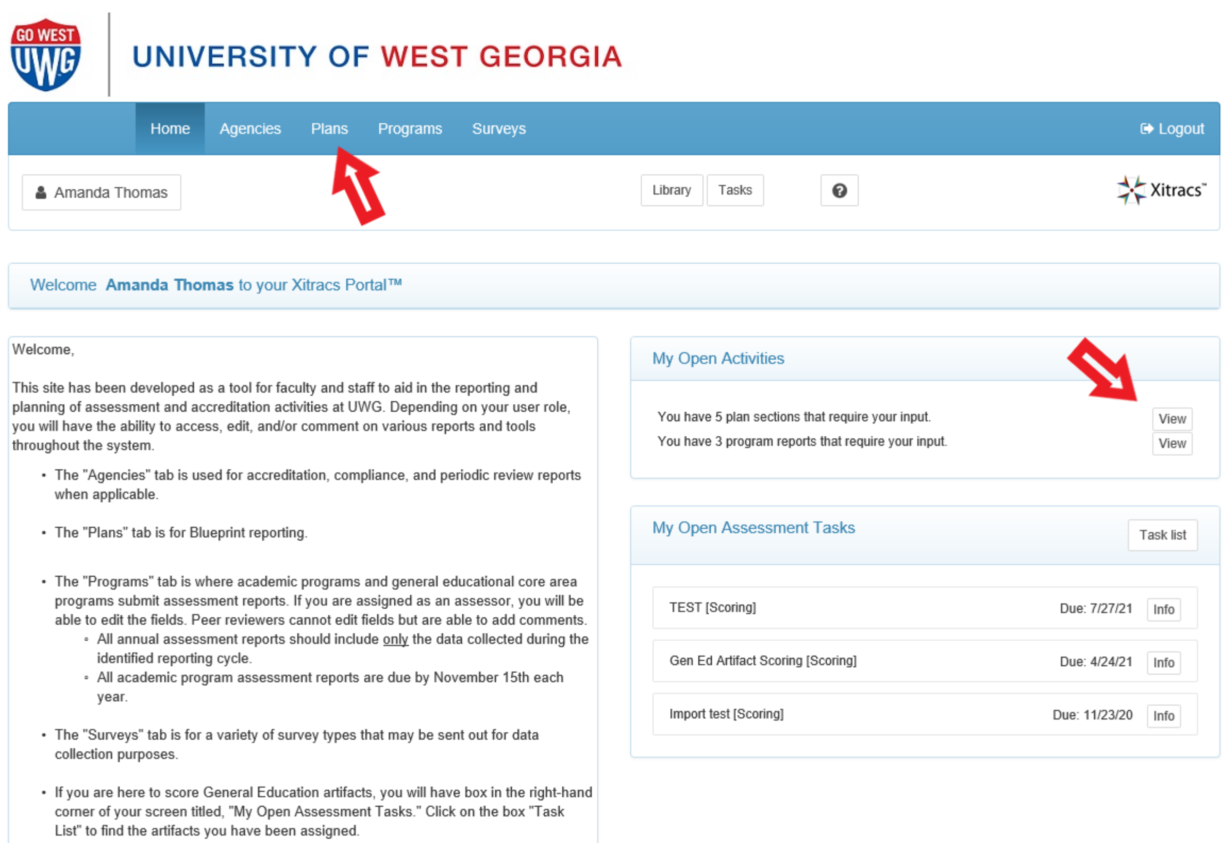
You can also access the Xitracs login page via the Xitracs Resources page found on the Institutional Effectiveness and Assessment website here, https://www.westga.edu/administration/vpaa/iea/xitracs.php

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

Accessing Your Blueprints

When you first log into the Portal, you will arrive at the homepage. Here, you will see a welcome message that includes information about expectations for assessment reporting along with 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.



Roles

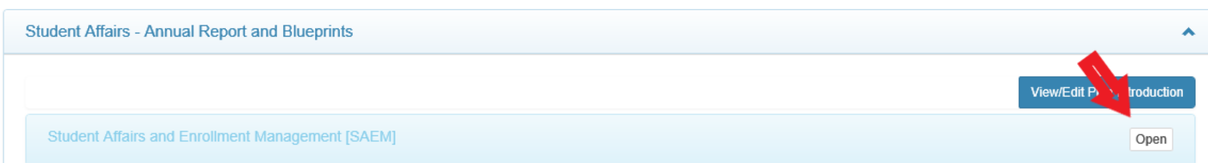
There are three types of User Roles for Blueprints:

- 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

Click on the header bar of the Blueprint you wish to open, and then "Open."



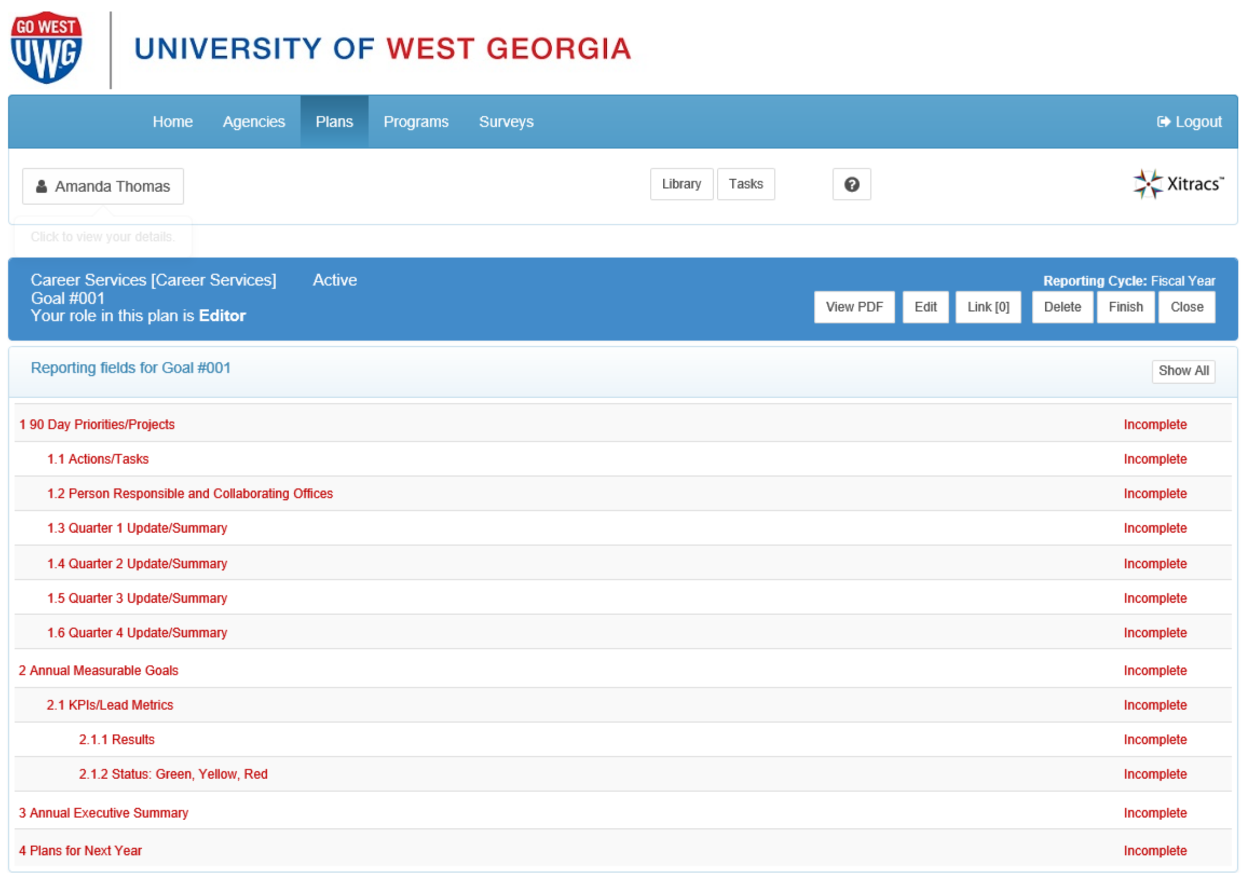
This will open the Unit level view. Here you will be able to see all Unit Goals being reported on this Cycle.

Entering Content to your Blueprint

If you are opening and creating a report for the first time, you will not have any content to view. The first step will be to click *Add Goal* in the unit Header Bar. This will generate a field set for the Goal.

After generating the field set, you will need to click the *Edit* button and enter your Goal. You can modify the Short Name, though it is not required. The full Goal will go into the text editing space.

Goal Header Bar



Along with the selected Goal, the *Header Bar* includes a few useful tools.

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 at least be linked to 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 will still be able to 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.

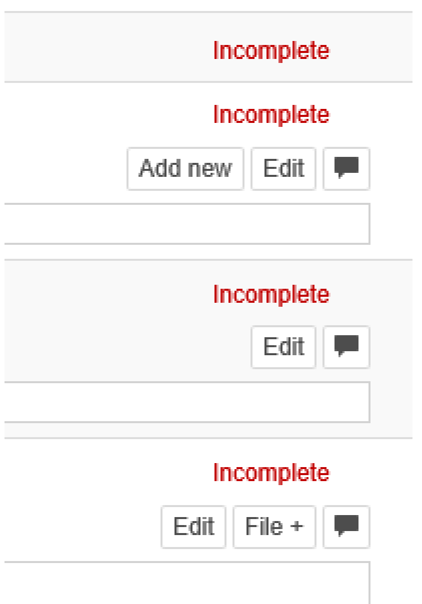
Show All

The *Show All* button expands/collapses content for all fields for ease of 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 options:

Complete (Select once you have completed filling out this part of the report.)
Not Applicable (Only available for some fields)
Include Child Fields (If "Complete" is selected along with this, it will mark all connected child fields as "complete" as well.)

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

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 <u>specific</u> tasks/actions your unit will 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 goal 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 that 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 units' 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, to include 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.

Submitting Goal for Approval (Editor)

1. **For each Goal**, verify all fields needed for the reporting period (90 days or Annual) are filled out correctly and marked as “Complete.” All fields should be green.

2. At the top of the page in the “Workflow” header, click the *Workflow* button. Here, you can select “Approval Requested” and enter any comments to share with the person assigned as “Reviewer.” The Reviewer will receive an email notification.

3. The Reviewer/Approver will have the chance to review the report and provide feedback if desired. If the report is sent back to you with feedback, after making any edits you will once again need to click the *Change* button and request approval.

Reviewing, Commenting, and Submitting (Reviewer)

1. Once the person designated as the “Editor” has requested approval, you will receive an email notification. While in the system, the report header will be colored orange with “Approval Requested ⚠”, shown below.

2. Open the report/Goal to be reviewed.

3. As you read through the various fields, anytime you see a grey comment box 💬 you can add comments/feedback on the field.

4. After you have reviewed the report, provided any necessary comments and/or are ready to approve the report, you will change the Workflow status by clicking the *Workflow* button within the Workflow header at the top of the page.

5. A pop-up window will appear with options for you to select.
    a. Reviewed with comments: This will send the report back to the Editor for additional editing, who will be notified via email.
    b. Approved: This will mark the report as “Approved” and notify the Editor.

6. If you choose to provide comments and send it back to the Editor, they will once again need to request approval. You will follow the same process as described above.