



UNIVERSITY OF WEST GEORGIA

Xitracs User Manual: Blueprint and Annual Report

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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.

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

Roles

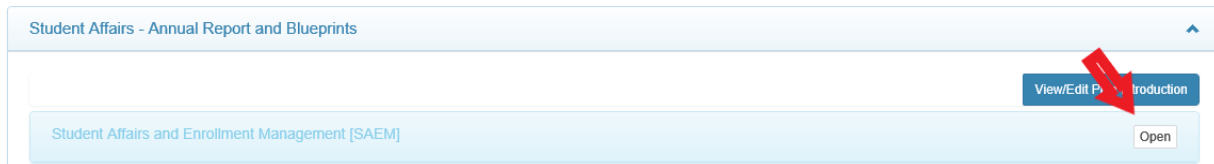
There are three types of User Roles for Blueprints:

- 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.

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 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. Please see the section below, [Starting a New Blueprint and/or Goal](#) for more information.

For information on starting a new reporting cycle, see the section below, [Starting a New Reporting Cycle](#).

Goal Header Bar

The screenshot displays the Xitracs interface for the University of West Georgia. At the top left is the UWG logo with the text "GO WEST UNIVERSITY OF WEST GEORGIA". A navigation bar includes "Home", "Agencies", "Plans", "Programs", and "Surveys", with "Logout" on the right. Below this is a user profile for "Amanda Thomas" with "Library" and "Tasks" buttons. A "Click to view your details." tooltip is visible. The main header bar for "Career Services [Career Services] Active" shows "Goal #001" and "Your role in this plan is Editor". Action buttons include "View PDF", "Edit", "Link [0]", "Delete", "Finish", and "Close". The "Reporting Cycle: Fiscal Year" is also indicated. Below the header bar is a table titled "Reporting fields for Goal #001" with a "Show All" button. The table lists various reporting fields, all of which are marked as "Incomplete".

Reporting Field	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

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.

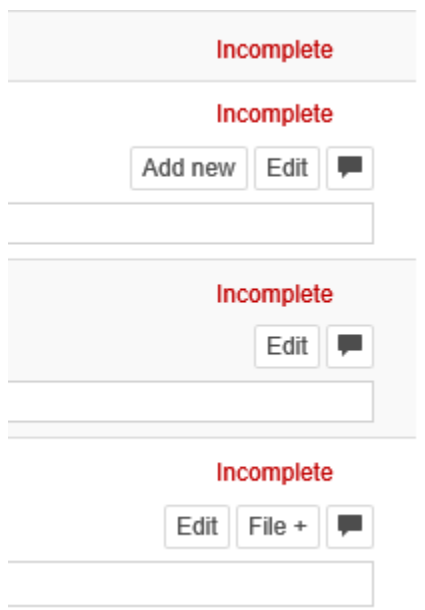
Show All

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 option:

Complete (Select once you have completed filling out this part of the report.)

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.*

**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 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 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

If this is the first time your unit has been asked to complete a Blueprint in Xitracs, 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 for any time you wish to add a new goal to your unit.

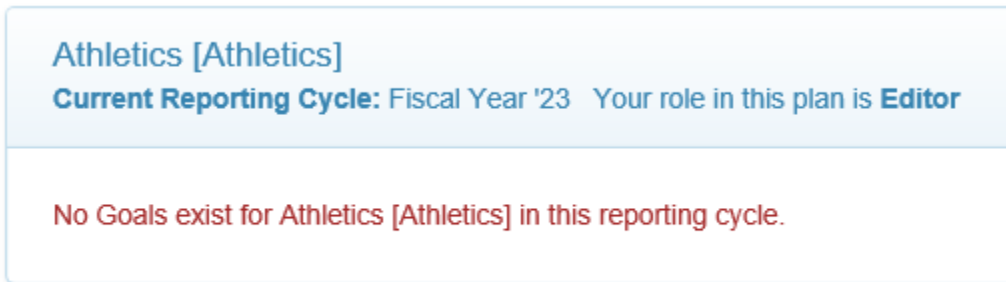
1. After you log in to the Xitracs system, click the Plans tab at the top or “Open” in the My Open Activities box in the upper right corner.

The screenshot shows the Xitracs portal for Amanda Thomas. The navigation bar includes Home, Agencies, Plans, Programs, and Surveys. The 'Plans' tab is highlighted with a red arrow. 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 and 'Info' buttons.

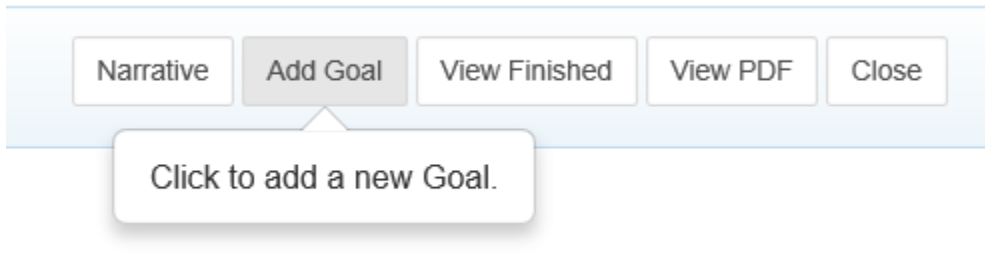
Task Name	Due Date	Action
TEST [Scoring]	Due: 7/27/21	Info
Gen Ed Artifact Scoring [Scoring]	Due: 4/24/21	Info
Import test [Scoring]	Due: 11/23/20	Info

2. “Open” the appropriate Unit. **You may need to click on a row to have it expand and show you more options.*

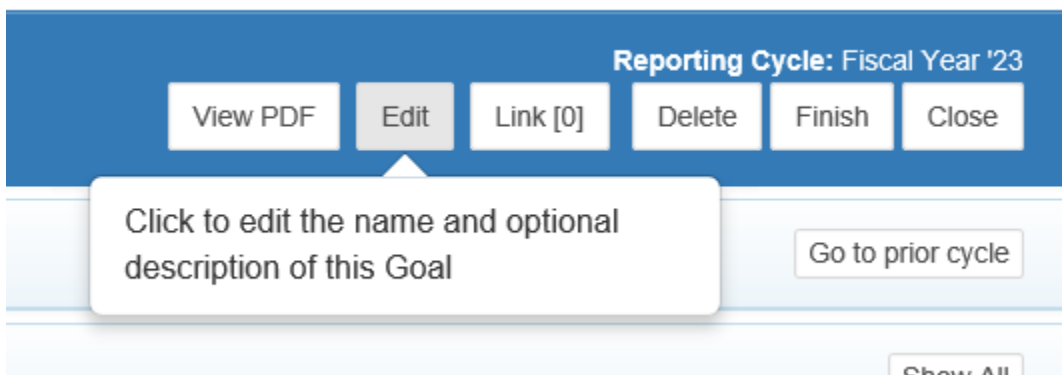
3. Once in the correct Unit, you will see in red text, “No Goals exist for <insert your unit name> in this reporting cycle.”



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



5. After generating the field set, 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 [Grid] [Code]

B I U [Text Color] [Background Color] [Bulleted List] [Numbered List] [Indent] [Outdent] [Undo] [Redo]

Save Cancel

7. 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.
8. 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.

Starting a New Reporting Cycle

Blueprints run on a fiscal calendar, July 1 - June 30. Each time a new reporting cycle is opened, your unit will have the option to “Finish” any previous goals that you no longer wish to work on/have completed working on. Or, you may decide to continue working on a goal into the next cycle.

Please follow the instructions below for finishing a goal and viewing finished goals.

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.

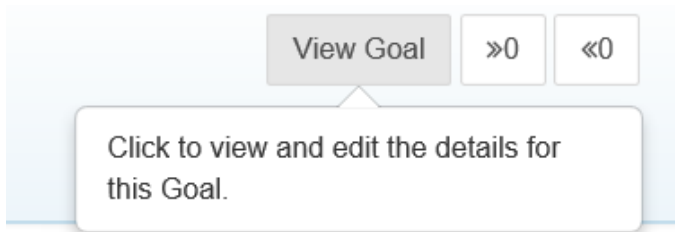
The screenshot shows the Xitracs portal interface. At the top, there is a navigation bar with tabs for Home, Agencies, Plans, Programs, and Surveys. The 'Plans' tab is highlighted with a red arrow. Below the navigation bar, there is a user profile for Amanda Thomas, a Library button, a Tasks button, and a Xitracs logo. A welcome message reads: "Welcome Amanda Thomas to your Xitracs Portal™". The main content area is divided into two columns. The left column contains a welcome message and a list of instructions for using the system. The right column contains two sections: "My Open Activities" and "My Open Assessment Tasks". The "My Open Activities" section is highlighted with a red arrow and contains a "View" button. The "My Open Assessment Tasks" section contains a table of tasks with columns for task name, due date, and an "Info" button.

Task Name	Due Date	Info
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

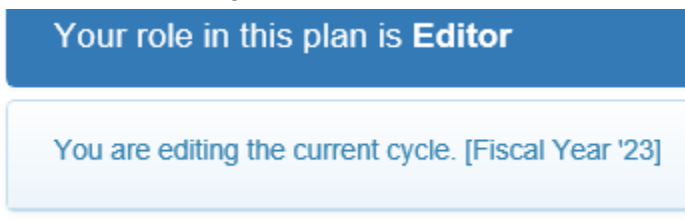
2. “Open” the appropriate Unit. **You may need to click on a row to have it expand and show you more options.*

Once opened, you will see a list of all active goals for your unit.

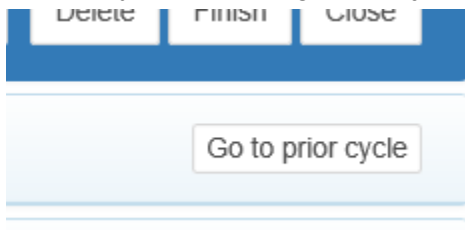
3. If you click on “View Goal” for any of the displayed goals, you will be taken to the new blank Blueprint template for the next fiscal year.



4. Just below the darker blue header bar, you will see a row that tells you what cycle you are working in.

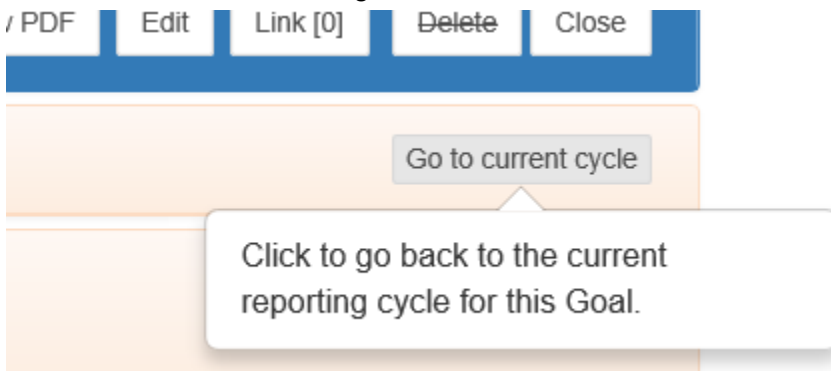


5. To view the Blueprint from the previous reporting cycle for this goal, click the “Go to Prior Cycle” on the right side, just below the darker blue header bar.

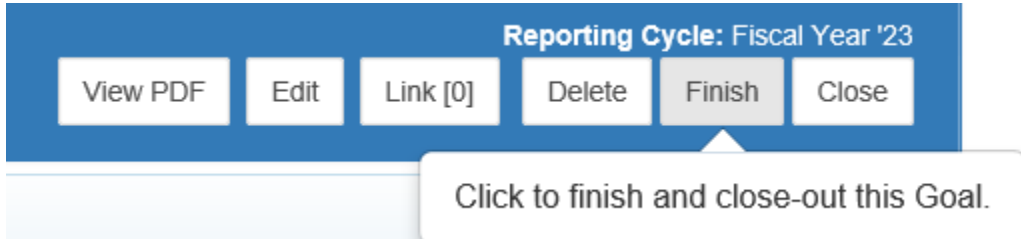


6. Once you are viewing a previous reporting cycle, some of the header rows will turn orange to indicate that you are in a reporting cycle that is not the current reporting cycle.

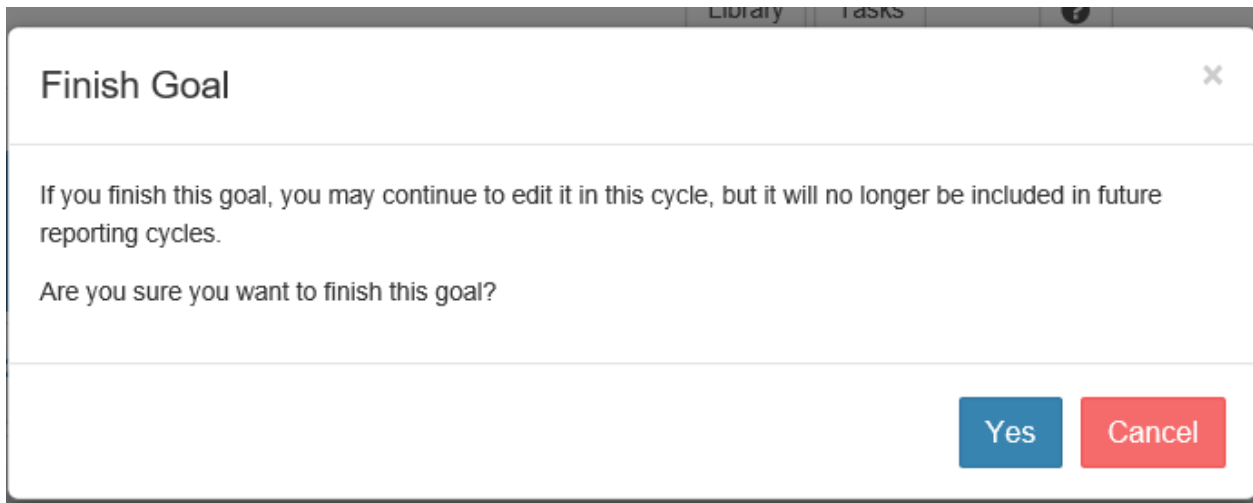
7. To get back to the Current Reporting Cycle, click the “Go to current cycle” on the right side in the first orange row.



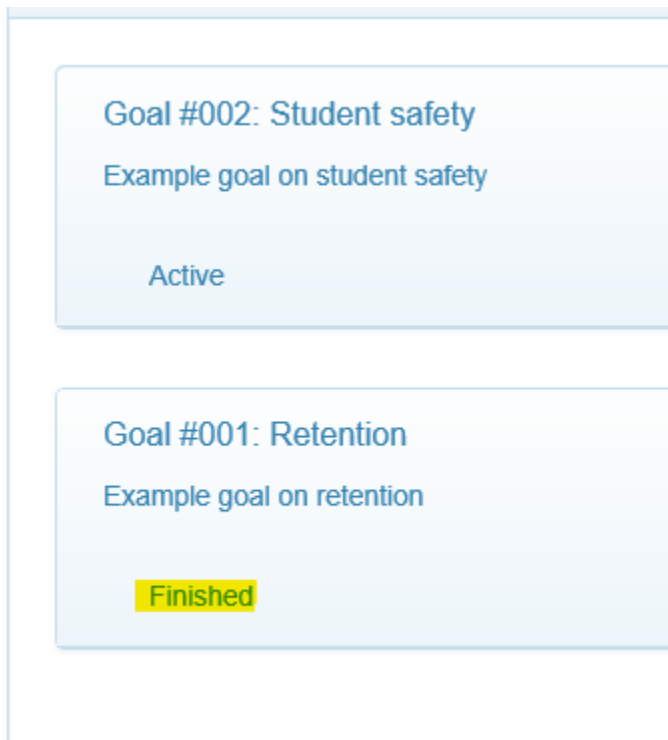
8. While working in the current reporting cycle, you will have a “Finish” button available to you for each Goal. If your Unit has decided that you have fully achieved a goal or you no longer wish to continue working on it, you can decide to finish (close-out) the goal. The goal and any other Blueprint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



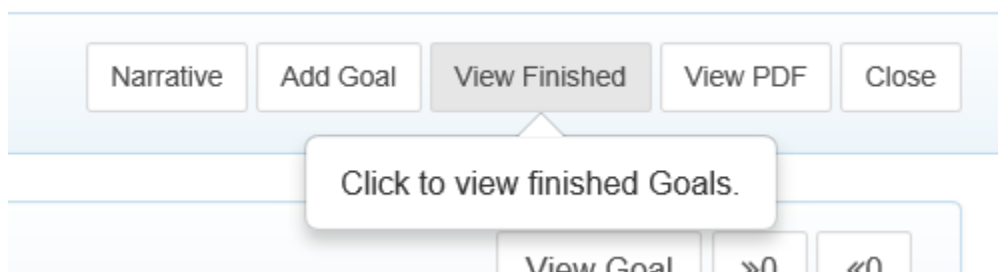
9. If you click the “Finish” button, you will be prompted to confirm your selection. **Please note that you will have the option to Reactivate this goal during this reporting cycle.*



10. Any goals that you chose 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.”



11. While on the main page for your Unit where all active goals are listed, you can click the “View Finished” button, to view a full list of finished goals from any reporting cycle.



12. Once you have finished all goals that your unit no longer wishes to report on, please proceed with [adding any new goals](#) and completing the Blueprint templates. Refer to the [Report Content Descriptions](#) above for more information on what goes in each field.

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