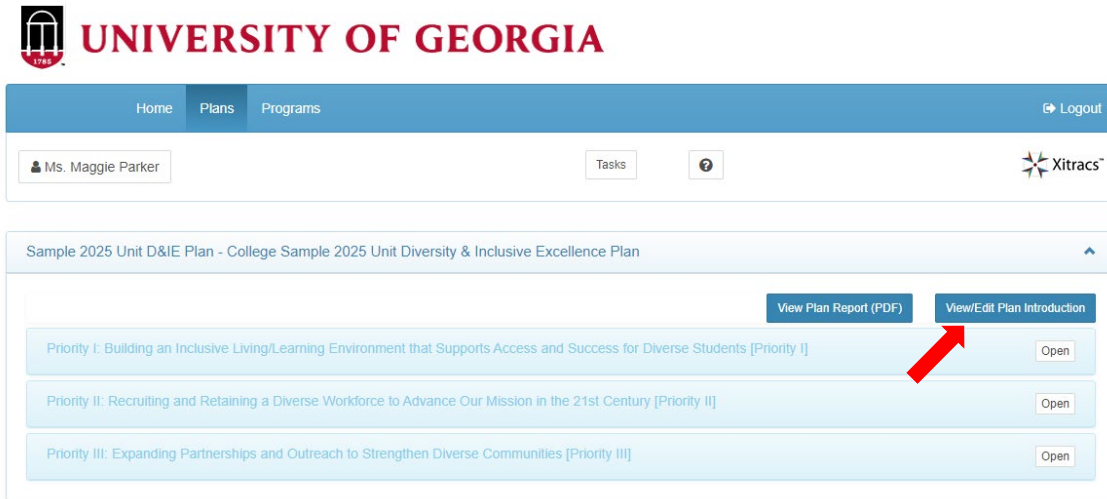


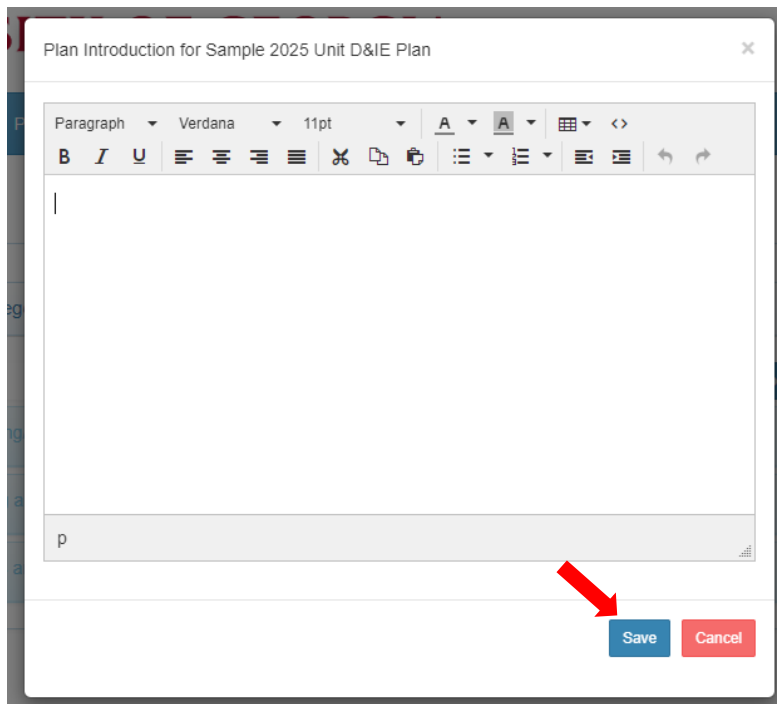
How to Edit Unit Diversity & Inclusive Excellence Plans & Reports

Edit Diversity & Inclusive Excellence Plan Introduction

From the Plan view, click on the *View/Edit Plan Introduction* button.

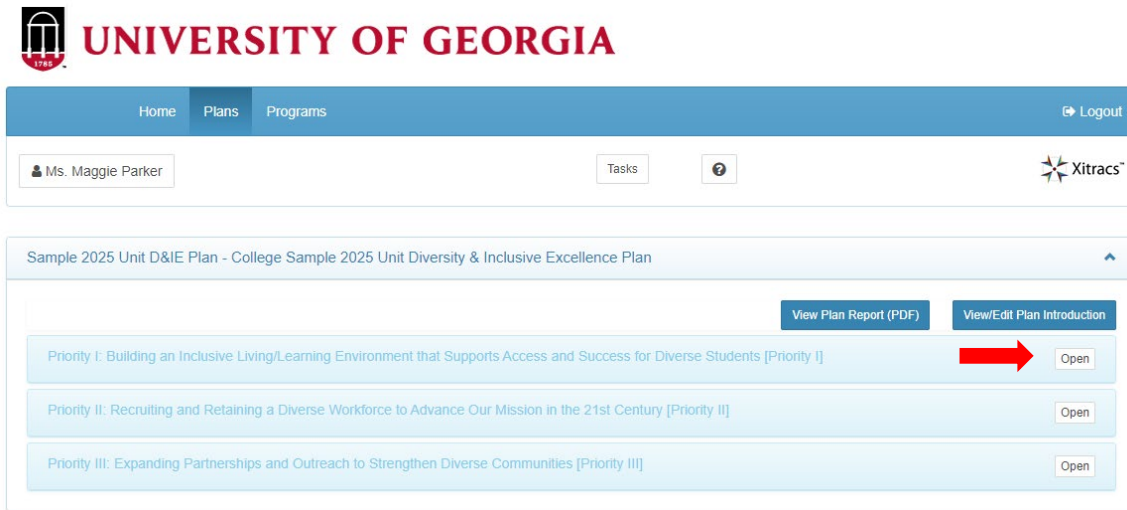


Enter or edit the introductory text using the HTML editor. Once completed, make sure to click the *Save* button.



Strategic Priorities

From the Plan view, click on the *Open* button for the Strategic Priority you wish to view.

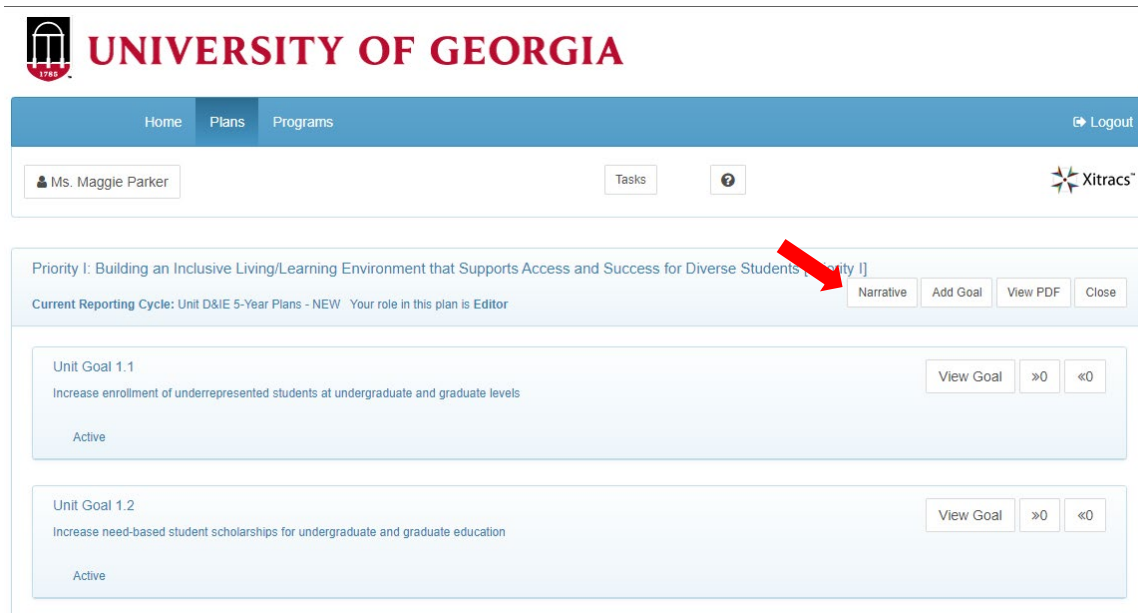


The screenshot shows the University of Georgia XitracS interface. At the top, there is a navigation bar with 'Home', 'Plans', and 'Programs' tabs, and a 'Logout' button. Below the navigation bar, the user's name 'Ms. Maggie Parker' is displayed, along with 'Tasks' and a help icon. The main content area shows a list of Strategic Priorities under the heading 'Sample 2025 Unit D&IE Plan - College Sample 2025 Unit Diversity & Inclusive Excellence Plan'. There are two buttons at the top right: 'View Plan Report (PDF)' and 'View/Edit Plan Introduction'. The list contains three items:

- Priority I: Building an Inclusive Living/Learning Environment that Supports Access and Success for Diverse Students [Priority I] (with a red arrow pointing to the 'Open' button)
- Priority II: Recruiting and Retaining a Diverse Workforce to Advance Our Mission in the 21st Century [Priority II] (with an 'Open' button)
- Priority III: Expanding Partnerships and Outreach to Strengthen Diverse Communities [Priority III] (with an 'Open' button)

This will bring up all of the *Goals* associated with the selected *Strategic Priority*.

To add a narrative introduction for each Strategic Priority, click the *Narrative* button at the top (optional).



The screenshot shows the University of Georgia XitracS interface with the details of a Strategic Priority. At the top, there is a navigation bar with 'Home', 'Plans', and 'Programs' tabs, and a 'Logout' button. Below the navigation bar, the user's name 'Ms. Maggie Parker' is displayed, along with 'Tasks' and a help icon. The main content area shows the details of 'Priority I: Building an Inclusive Living/Learning Environment that Supports Access and Success for Diverse Students [Priority I]'. There are four buttons at the top right: 'Narrative', 'Add Goal', 'View PDF', and 'Close'. Below the buttons, the 'Current Reporting Cycle' is 'Unit D&IE 5-Year Plans - NEW' and the user's role is 'Editor'. The list contains two items:

- Unit Goal 1.1: Increase enrollment of underrepresented students at undergraduate and graduate levels (with 'View Goal', '>0', and '<0' buttons)
- Unit Goal 1.2: Increase need-based student scholarships for undergraduate and graduate education (with 'View Goal', '>0', and '<0' buttons)

Diversity & Inclusive Excellence Plan Goals

To edit an existing Unit Goal, click the *View Goal* button on the right.

To add a new goal to the Plan, click the *Add Goal* button at the top.

The screenshot shows the University of Georgia Xitrac interface. At the top, there is a navigation bar with 'Home', 'Plans', and 'Programs' tabs, and a 'Logout' button. Below this is a user profile section for 'Ms. Maggie Parker' with 'Tasks' and a help icon. The main content area displays a 'Priority I: Building an Inclusive Living/Learning Environment that Supports Access and Success for Diverse Students [Priority I]' with a 'Narrative' button and 'Add Goal', 'View PDF', and 'Close' buttons. Below the priority header, there are two 'Unit Goal' entries. The first is 'Unit Goal 1.1: Increase enrollment of underrepresented students at undergraduate and graduate levels', which is 'Active' and has a 'View Goal', '>0', and '<0' button. The second is 'Unit Goal 1.2: Increase need-based student scholarships for undergraduate and graduate education', which is also 'Active' and has a 'View Goal', '>0', and '<0' button. Red arrows point to the 'Add Goal' button at the top and the 'View Goal' button for Unit Goal 1.1.

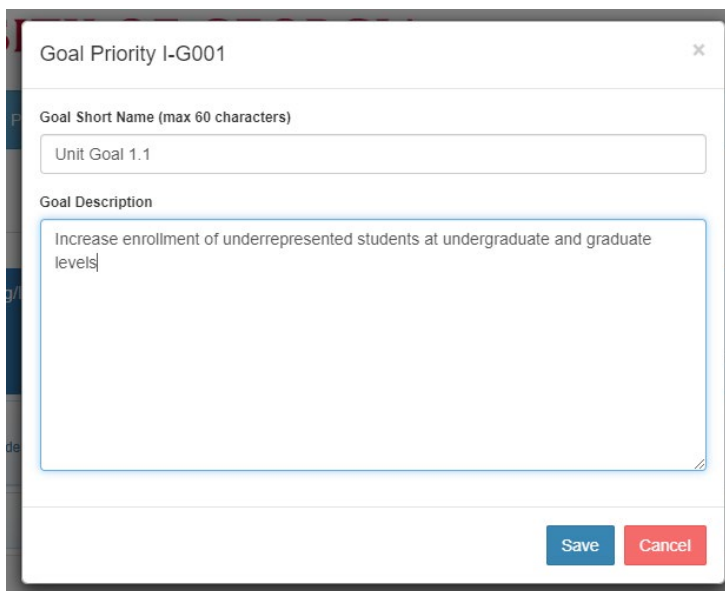
Once you click *View*, Unit Goals are described at the top of the page, under the Strategic Priority (dark blue bar).

To edit the goal, click the *Edit* button.

The screenshot shows the detailed view of a Unit Goal in the University of Georgia Xitrac system. At the top, there is a navigation bar with 'Home', 'Plans', and 'Programs' tabs, and a 'Logout' button. Below this is a user profile section for 'Ms. Maggie Parker' with 'Tasks' and a help icon. The main content area displays a 'Priority I: Building an Inclusive Living/Learning Environment that Supports Access and Success for Diverse Students [Priority I]' with an 'Active' status and 'View PDF', 'Edit', 'Link [0]', 'Delete', and 'Close' buttons. Below the priority header, there is a 'Goal Description' section with the text 'Increase enrollment of underrepresented students at undergraduate and graduate levels'. Below the goal description, there is a 'Reporting fields for Unit Goal 1.1' section with a 'Show All' button. Below the reporting fields, there is a table with 1 Key Performance Indicator and 3 Annual Targets FY22, all of which are 'Incomplete'.

1 Key Performance Indicator	Incomplete
1.1 Data Source	Incomplete
1.2 Annual Targets FY22	Incomplete
1.2.1 FY23	Incomplete

Edit the *Goal Short Name* and *Goal Description* using the text box. Make sure you click *Save* when complete.



The image shows a software window titled "Goal Priority I-G001" with a close button (X) in the top right corner. Below the title bar, there are two main sections. The first section is labeled "Goal Short Name (max 60 characters)" and contains a text input field with the text "Unit Goal 1.1". The second section is labeled "Goal Description" and contains a larger text area with the text "Increase enrollment of underrepresented students at undergraduate and graduate levels". At the bottom right of the window, there are two buttons: a blue "Save" button and a red "Cancel" button.

Edit KPIs, Data Sources, & Annual Targets

To edit any of the other fields in the Diversity & Inclusive Excellence Plan/Report, click on the line to expand the field you wish to edit.


Priority I: Building an Inclusive Living/Learning Environment that Supports Access and Success for Diverse Students [Priority I] Active
Unit Goal 1.1
Your role in this plan is **Editor**

View PDF Edit Link [0] Delete Close Reporting Cycle: Unit D&IE 5-Year Plans - NEW

Goal Description
Increase enrollment of underrepresented students at undergraduate and graduate levels

Reporting fields for Unit Goal 1.1 Show All

1 Key Performance Indicator		Incomplete
1.1 Data Source		Incomplete
1.2 Annual Targets FY22		Incomplete
1.2.1 FY23		Incomplete
1.2.2 FY24		Incomplete
1.2.3 FY25		Incomplete
1.3 Annual Performance FY22		Incomplete
1.3.1 FY23		Incomplete
1.3.2 FY24		Incomplete
1.3.3 FY25		Incomplete
1.4 Additional Comments (related to performance)		Incomplete



To edit the text fields, click the *Edit* button.


Priority I: Building an Inclusive Living/Learning Environment that Supports Access and Success for Diverse Students [Priority I] Active
Unit Goal 1.1
Your role in this plan is **Editor**

View PDF Edit Link [0] Delete Close Reporting Cycle: Unit D&IE 5-Year Plans - NEW

Goal Description
Increase enrollment of underrepresented students at undergraduate and graduate levels

Reporting fields for Unit Goal 1.1 Show All

1 Key Performance Indicator		Incomplete
<input type="text"/>		Add new Edit File + Drop + ▾
1.1 Data Source		Incomplete
1.2 Annual Targets FY22		Incomplete
1.2.1 FY23		Incomplete
1.2.2 FY24		Incomplete
1.2.3 FY25		Incomplete
1.3 Annual Performance FY22		Incomplete
1.3.1 FY23		Incomplete
1.3.2 FY24		Incomplete
1.3.3 FY25		Incomplete
1.4 Additional Comments (related to performance)		Incomplete



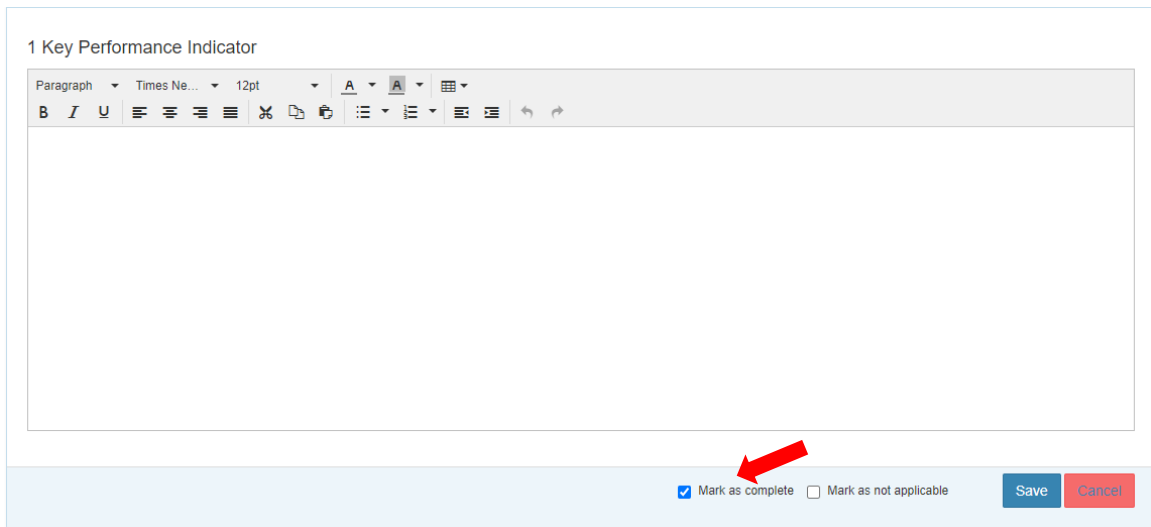
Make sure to mark the field as *Complete* in the bottom left corner, and then *Save* once you have finished entering the information.

1 Key Performance Indicator

Paragraph Times Ne... 12pt A A

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

Mark as complete Mark as not applicable Save Cancel

The image shows a screenshot of a web form titled "1 Key Performance Indicator". At the top, there is a rich text editor toolbar with options for Paragraph, Times New Roman font, 12pt size, bold (B), italic (I), underline (U), text alignment (left, center, right, justified), list creation, and undo/redo. Below the toolbar is a large empty text area. At the bottom of the form, there is a light blue footer bar containing two checkboxes: "Mark as complete" (which is checked) and "Mark as not applicable" (which is unchecked). To the right of these checkboxes are two buttons: "Save" (blue) and "Cancel" (red). A red arrow points from the right towards the "Mark as complete" checkbox.

Add Additional KPIs

If you would like to add an additional KPI for a goal, click the *Add New* button on the first KPI field.

Priority I: Building an Inclusive Living/Learning Environment that Supports Access and Success for Diverse Students [Priority I] Active
Unit Goal 1.1
Your role in this plan is **Editor**

View PDF Edit Link [0] Delete Close Reporting Cycle: Unit D&IE 5-Year Plans - NEW

Goal Description
Increase enrollment of underrepresented students at undergraduate and graduate levels

Reporting fields for Unit Goal 1.1 Show All

1 Key Performance Indicator	Incomplete
<input type="text"/>	Add new Edit File + Drop + ⌵
1.1 Data Source	Incomplete
1.2 Annual Targets FY22	Incomplete
1.2.1 FY23	Incomplete
1.2.2 FY24	Incomplete
1.2.3 FY25	Incomplete
1.3 Annual Performance FY22	Incomplete
1.3.1 FY23	Incomplete
1.3.2 FY24	Incomplete
1.3.3 FY25	Incomplete
1.4 Additional Comments (related to performance)	Incomplete

This will populate an additional KPI field and all of the sub-fields (data source, targets, etc.) under your goal.