

Xitracs Planning Module UGA Portal User Manual

2023

Contents

Logging into Xitracs Portal.....	1
Accessing Unit Diversity & Inclusive Excellence Plans.....	1
Editing Unit Diversity & Inclusive Excellence Plans & Reports.....	3
Diversity & Inclusive Excellence Plan Introduction.....	3
Strategic Priorities	4
Diversity & Inclusive Excellence Plan Goals.....	5
Edit KPIs, Data Sources, & Annual Targets	7
Add Additional KPIs	9
Annual Performance Reporting.....	10
Produce a PDF of the Unit Diversity & Inclusive Excellence Plan	12
Export a PDF of the Entire Unit Diversity & Inclusive Excellence Plan.....	12
Export a PDF of One Strategic Priority.....	13
Export a PDF of Just One Unit Goal	14

Logging into Xitracs Portal

Log into the Xitracs Portal with your UGA MyID and password: <https://uga.xitracs.net/portal.htm>

If you are having trouble logging into the Portal, please contact Maggie Parker at mcparker@uga.edu.

NOTE: If you already have access to Xitracs for other functions (LOA reporting, SACSCOC reporting), you likely use the Xitracs SYSTEM User view. Unfortunately, web browsers will often confuse these two URLs (the System and the Portal views), causing issues. In these instances, there are two options for accessing the PORTAL View:

- 1 – open an incognito/private window in your browser and type in the Portal URL above, or
- 2 – use a different browser to access the Portal view (than you use to access the System view).

Accessing Unit Diversity & Inclusive Excellence Plans

When you first log into the Portal, you will arrive at the homepage. Here you will see a welcome message and contact information for various tools in the Portal.

To get to your unit's Diversity & Inclusive Excellence Plan, you can either click *View* under My Open Activities OR use the *Plans* tab in the blue navigation bar at the top.

UNIVERSITY OF GEORGIA

Home Plans Programs Logout

Ms. Maggie Parker Tasks Xitracs™

Welcome Ms. Maggie Parker to your Xitracs Portal™

For questions or concerns regarding the Xitracs Portal, please refer to the appropriate contact below:

Learning Outcomes Assessment (Program & University-Level)
Katie Burr, Associate Director of Assessment, katieburr@uga.edu
Resource: <https://assessment.uga.edu>

Strategic Planning
Maggie Parker, Associate Director for Accreditation, mcparker@uga.edu
Resource: <https://oir.uga.edu/sp2025/xitracs/>

Program Review
Katie Chapman, Program Review Coordinator, ktchapman@uga.edu

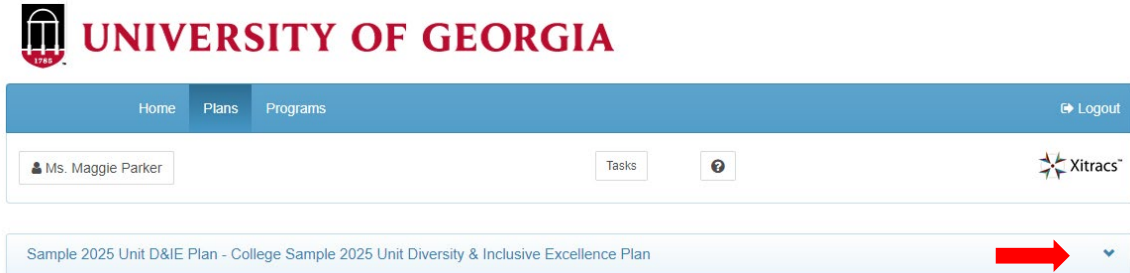
My Open Activities

You have 1 plan section that requires your input.

You have 2 program reports that require your input.

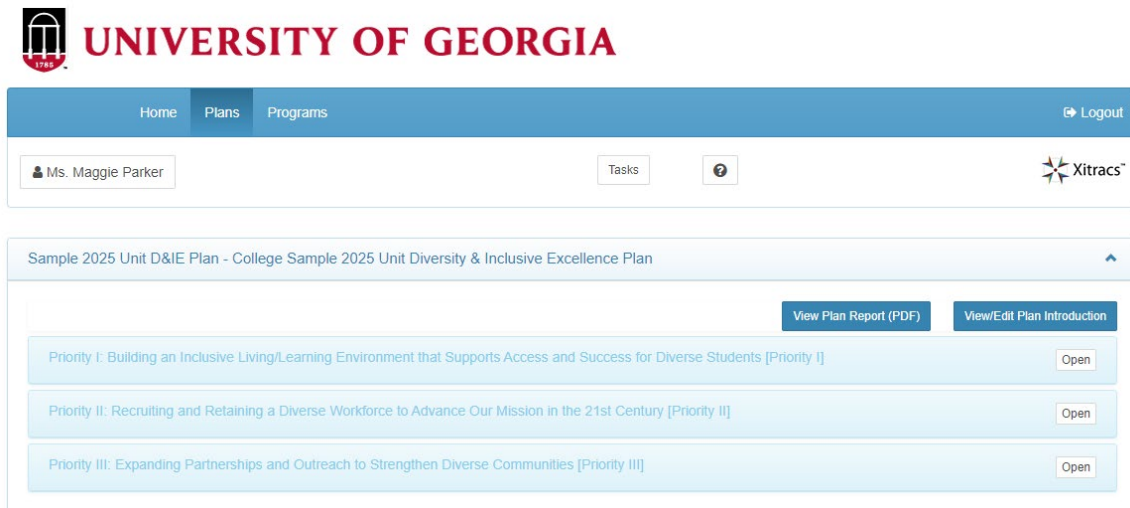
The plan(s) for which you have been assigned will be listed on the *Plan* tab.

If you do not see the Diversity & Inclusive Excellence Plan you need access to, please contact Maggie Parker at mcparker@uga.edu.



Click on the small down arrow on the right side of the screen to open the plan.

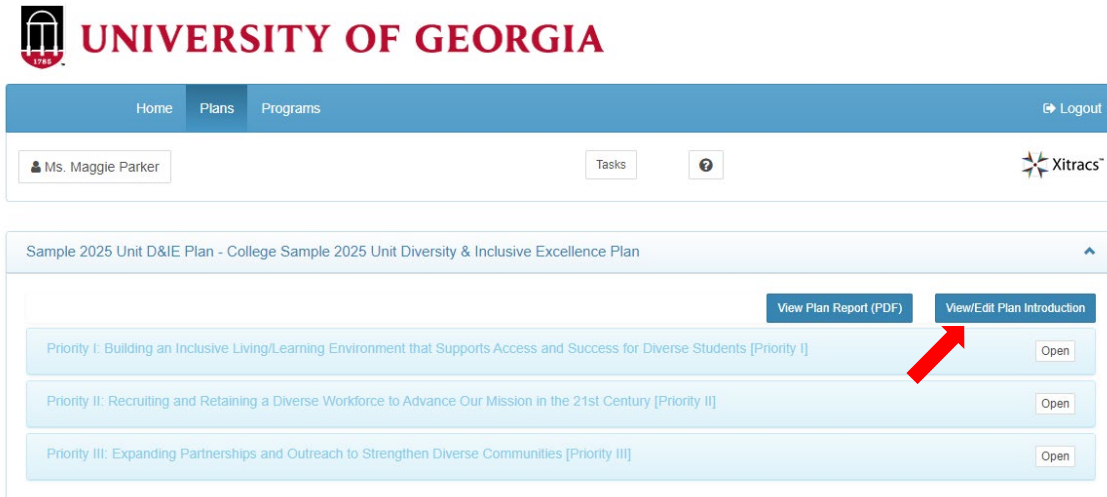
From here, you will see the structure of the Diversity & Inclusive Excellence Plan, including the defined Strategic Priorities.



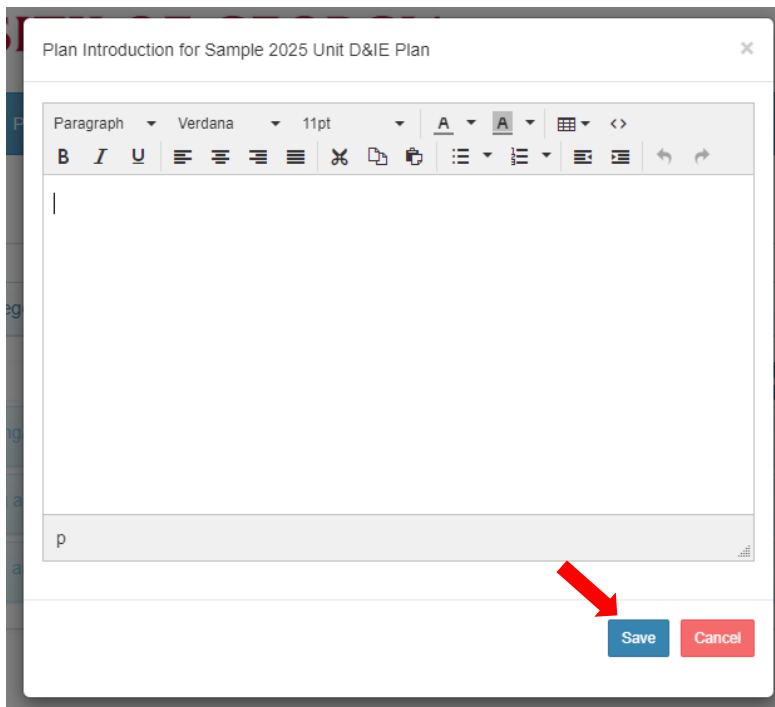
Editing Unit Diversity & Inclusive Excellence Plans & Reports

Diversity & Inclusive Excellence Plan Introduction

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

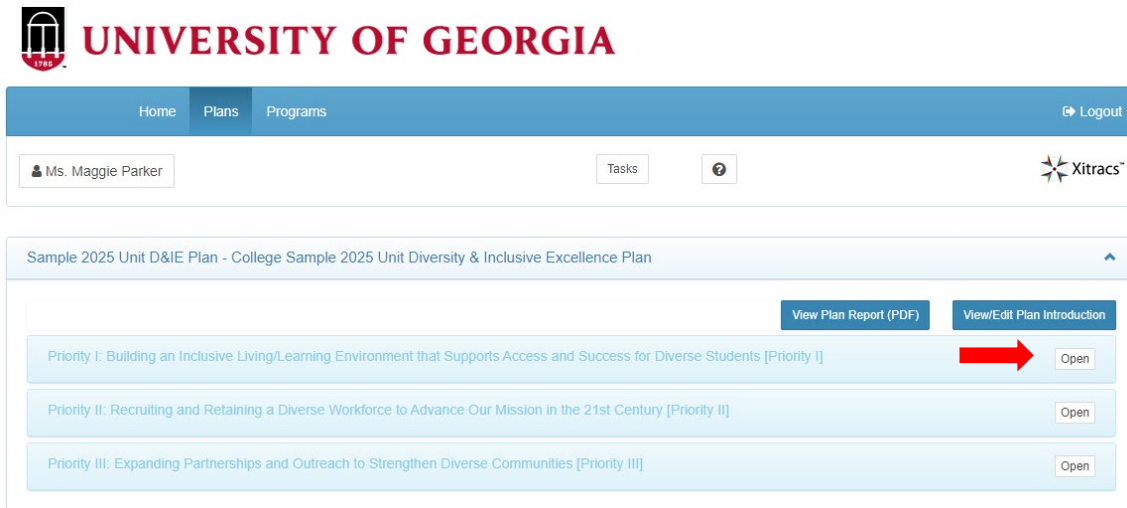


Enter or edit the introductory text using the HTML editor. Once completed, make sure to click the *Save* button.



Strategic Priorities

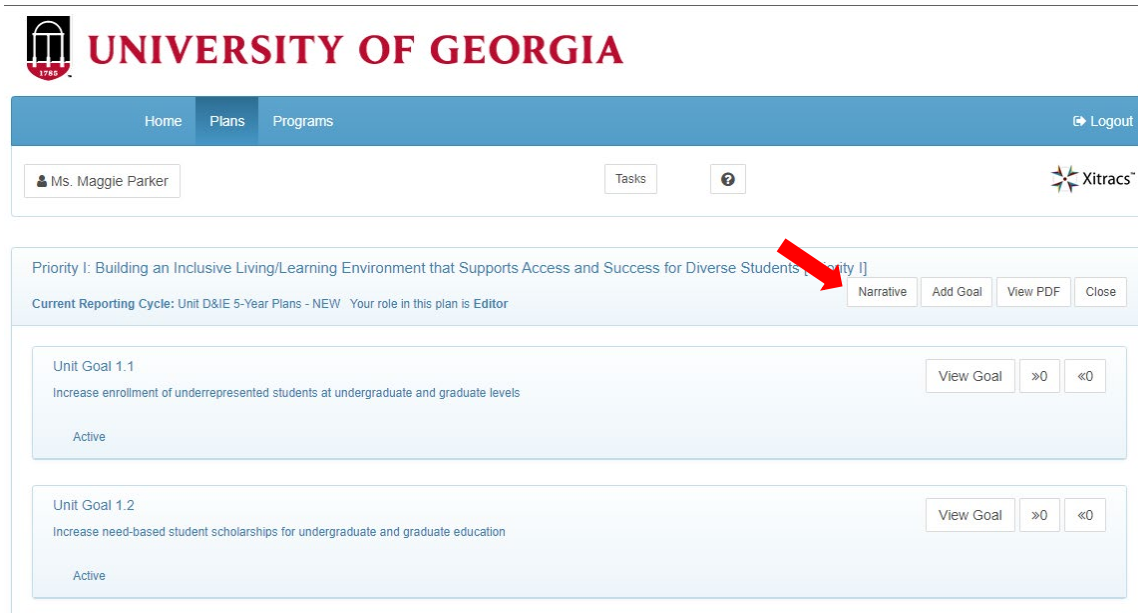
From the Plan view, click on the *Open* button for the Strategic Priority you wish to view.



The screenshot shows the University of Georgia Xitrac 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 for the 'Sample 2025 Unit D&IE Plan - College Sample 2025 Unit Diversity & Inclusive Excellence Plan'. The list includes three priorities, each with an 'Open' button. A red arrow points to the 'Open' button for Priority I: Building an Inclusive Living/Learning Environment that Supports Access and Success for Diverse Students [Priority I].

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 Xitrac interface displaying the details of a Strategic Priority. The priority is 'Priority I: Building an Inclusive Living/Learning Environment that Supports Access and Success for Diverse Students [Priority I]'. Below the priority title, there is a 'Narrative' button, an 'Add Goal' button, a 'View PDF' button, and a 'Close' button. A red arrow points to the 'Narrative' button. The main content area shows a list of Unit Goals for this priority. The first goal is 'Unit Goal 1.1: Increase enrollment of underrepresented students at undergraduate and graduate levels'. The second goal is 'Unit Goal 1.2: Increase need-based student scholarships for undergraduate and graduate education'. Each goal has a 'View Goal' button and navigation arrows.

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 'Current Reporting Cycle: Unit D&IE 5-Year Plans - NEW' and 'Your role in this plan is Editor'. There are buttons for 'Narrative', 'Add Goal', 'View PDF', and 'Close'. Below this, two 'Unit Goal' cards are shown. The first card is for 'Unit Goal 1.1: Increase enrollment of underrepresented students at undergraduate and graduate levels' and is 'Active'. It has a 'View Goal' button and navigation arrows. A red arrow points to this 'View Goal' button. The second card is for 'Unit Goal 1.2: Increase need-based student scholarships for undergraduate and graduate education' and is also 'Active', with its own 'View Goal' button and navigation arrows. Another red arrow points to the 'Add Goal' button at the top right.

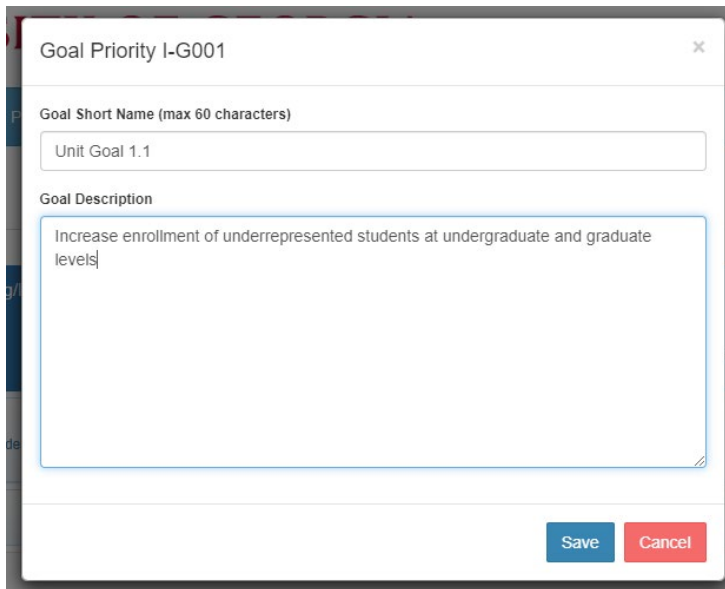
Once you click *View*, Unit Goals are described at the top of the page, under the Strategic Priority (dark blue bar).

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

The screenshot shows the detailed view of 'Unit Goal 1.1' in the University of Georgia Xitrac system. The top navigation bar is dark blue and contains 'Home', 'Plans', and 'Programs' tabs, a 'Logout' button, and the user profile 'Ms. Maggie Parker'. Below this is a 'Priority I: Building an Inclusive Living/Learning Environment that Supports Access and Success for Diverse Students [Priority I]' header with 'Active' status and 'Your role in this plan is Editor'. The goal description is 'Increase enrollment of underrepresented students at undergraduate and graduate levels'. A red arrow points to the 'Edit' button in the top navigation bar. Other buttons include 'View PDF', 'Link [0]', 'Delete', and 'Close'. Below the goal description, there is a 'Reporting fields for Unit Goal 1.1' section with a 'Show All' button. A table shows '1 Key Performance Indicator' with the following data:

Key Performance Indicator	Status
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.

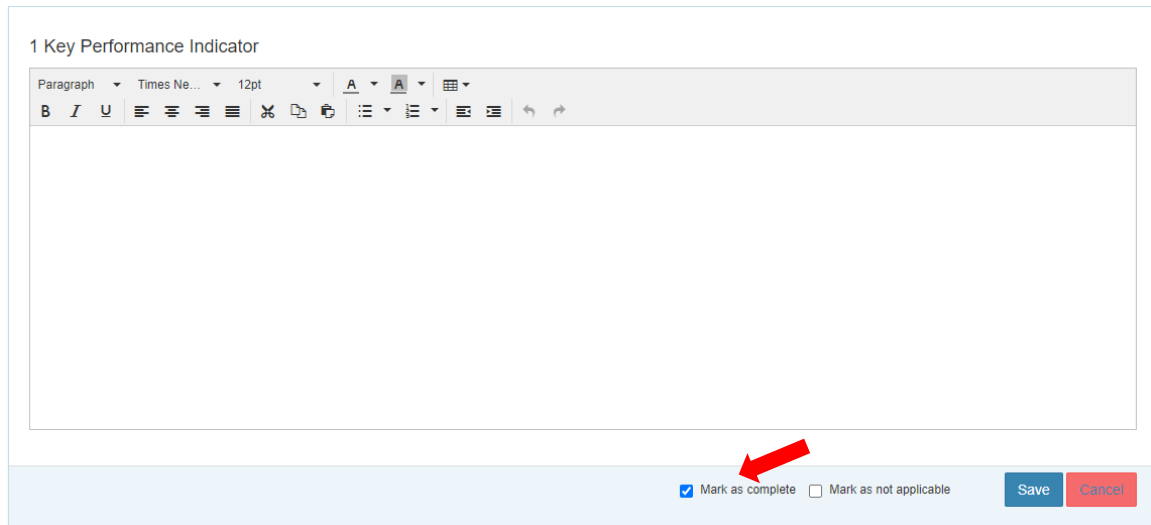
1 Key Performance Indicator

Paragraph Times Ne... 12pt

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

Mark as complete Mark as not applicable

Save Cancel

The image shows a screenshot of a software interface for entering a Key Performance Indicator. At the top, it says "1 Key Performance Indicator". Below this is a rich text editor toolbar with options for Paragraph, Times New Roman font, and 12pt size. The toolbar includes icons for bold (B), italic (I), underline (U), text alignment (left, center, right, justified), list creation (bulleted, numbered), and undo/redo. The main area is a large empty text box. At the bottom, there are two checkboxes: "Mark as complete" (checked) and "Mark as not applicable" (unchecked). A red arrow points to the "Mark as complete" checkbox. To the right of the checkboxes are "Save" and "Cancel" buttons.

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&E 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.

Annual Performance Reporting

In the Xitracs Portal, the *Annual Targets* and *Annual Performance* fields are in an outline format for entry. However, when a PDF report is produced for the Diversity & Inclusive Excellence Plan, these will be transformed into a more digestible format.

Strategic Direction I: Promoting Excellence in Teaching & Learning

Goal: Unit Goal 1.1	UGA 2025 Strategic Plan Linked Goals Strategic Goal 1.2
Increase the application rate for teaching improvement grants for all instructor types	

Key Performance Indicator

Teaching improvement grants for all instructors

Data Source

Center for Teaching and Learning, Unit Annual Reports

Annual Targets FY21	FY22	FY23	FY24	FY25
5	5	6	6	7
Annual Performance FY21	FY22	FY23	FY24	FY25
example performance data				

Additional Comments (related to performance)

Each year, units will be expected to enter performance data or information for each KPI into the appropriate fiscal year (FY) field.

To enter annual performance data, select on the appropriate FY field for the specific KPI, and click *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

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

Make sure to check *Mark as Complete* once the annual information is entered.

The screenshot shows a web-based reporting interface. At the top, it displays 'Priority I: Building an Inclusive Living/Learning Environment that Supports Access and Success for Diverse Students [Priority I]' and 'Unit Goal 1.1'. On the right, it says 'Reporting Cycle: Unit D&IE 5-Year Plans - NEW'. Below this, the section is labeled '1.3.1 FY23'. A rich text editor is present, with a toolbar showing options for Paragraph, Times New Roman, 12pt, Bold, Italic, Underline, Text Color, Background Color, Bulleted List, Numbered List, Indent, Outdent, Undo, and Redo. The text area is currently empty. At the bottom of the form, there are two radio buttons: 'Mark as complete' (which is selected) and 'Mark as not applicable'. To the right of these are 'Save' and 'Cancel' buttons. A red arrow points to the 'Mark as complete' checkbox.

Completion of this Annual Performance field is the only annual reporting requirement. If you have additional information or analysis you wish to provide, you can do so by entering it via the *Additional Comments (related to performance)* field at the bottom. Make sure to note which FY you are providing the information for in the text box.

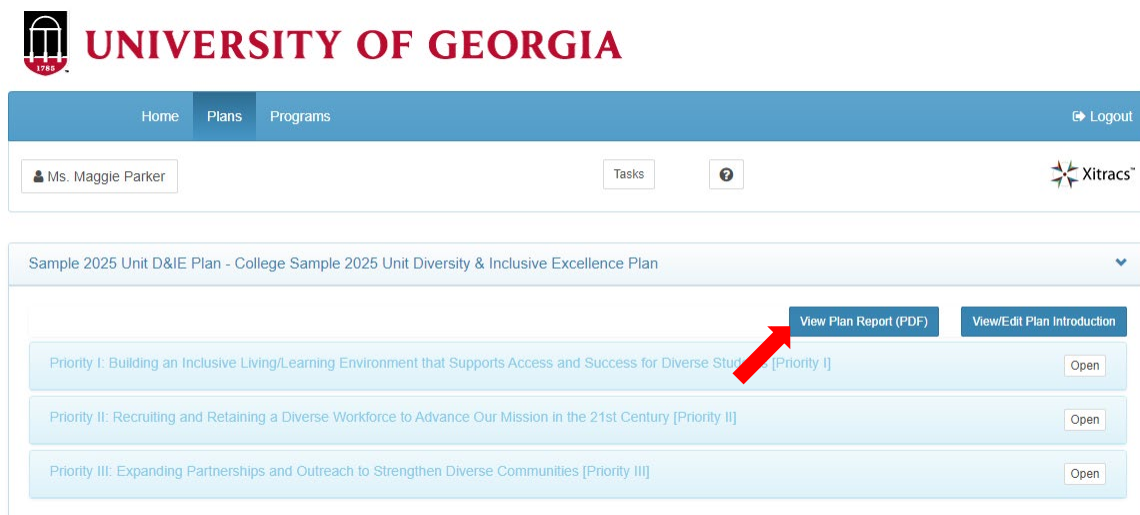
Produce a PDF of the Unit Diversity & Inclusive Excellence Plan

The Xitracs Portal allows you to produce a PDF of the Unit Diversity & Inclusive Excellence Plan in its entirety, and also in smaller pieces.

NOTE: In the Xitracs Portal, the Annual Targets and Annual Performance fields are in an outline format for entry. However, when a PDF report is produced for the Strategic Plan, these will be transformed into a more digestible format (see below).

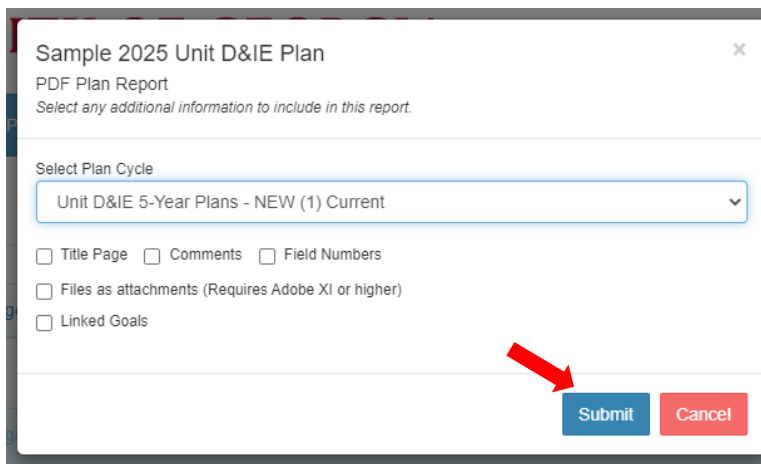
Export a PDF of the Entire Unit Diversity & Inclusive Excellence Plan

From the Plan view, click on the *View Plan Report* button.



The University has created a uniform report for Diversity & Inclusive Excellence Plans, so you don't need to click on any of the radio buttons below.

Click *Submit* to download the PDF report.

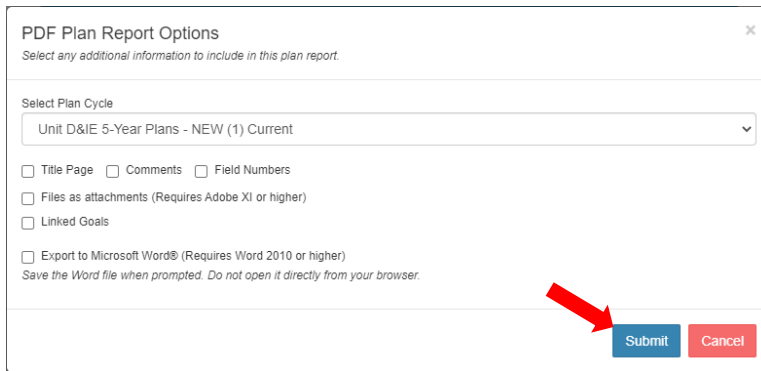


Export a PDF of One Strategic Priority
From the Strategic Priority view, click on the *View PDF* button.



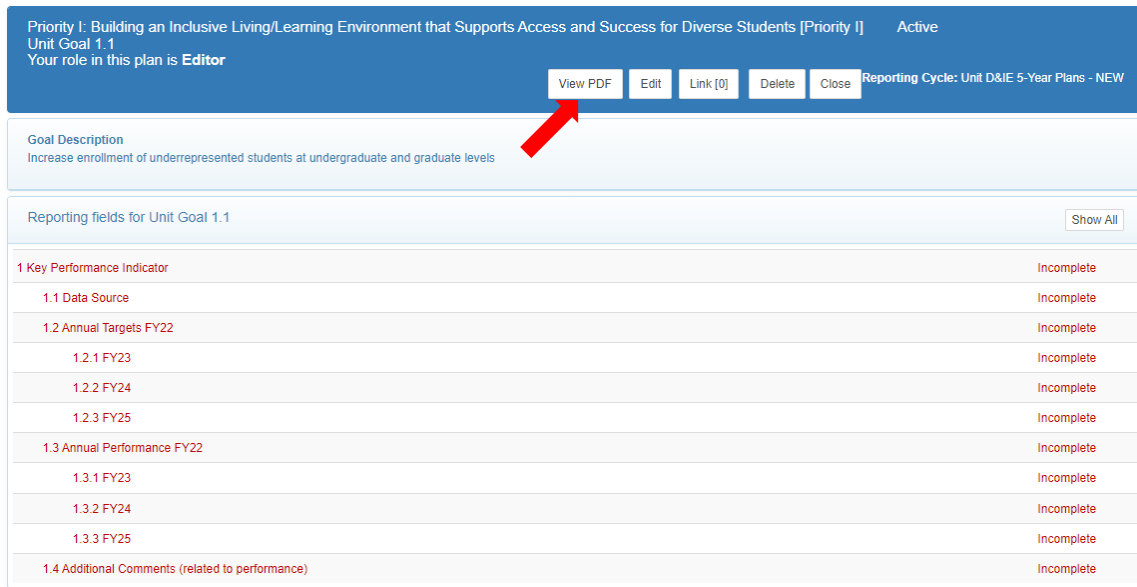
The screenshot shows the University of Georgia Xitrac interface. At the top, there is a navigation bar with 'Home', 'Plans', and 'Programs' tabs, and a 'Logout' button. Below this, a user profile for 'Ms. Maggie Parker' is visible, along with 'Tasks' and a help icon. The main content area displays a 'Priority I: Building an Inclusive Living/Learning Environment that Supports Access and Success for Diverse Students [Priority I]'. Underneath, it indicates the 'Current Reporting Cycle: Unit D&IE 5-Year Plans - NEW' and the user's role as 'Editor'. A row of buttons includes 'Narrative', 'Add Goal', 'View PDF', and 'Close'. A red arrow points to the 'View PDF' button. Below this, two unit goals are listed: 'Unit Goal 1.1: Increase enrollment of underrepresented students at undergraduate and graduate levels' and 'Unit Goal 1.2: Increase need-based student scholarships for undergraduate and graduate education'. Each goal has a 'View Goal' button and navigation arrows.

The University has created a uniform report for Unit Diversity & Inclusive Excellence Plans, so you don't need to click on any of the radio buttons below.



The screenshot shows a 'PDF Plan Report Options' dialog box. It contains a dropdown menu for 'Select Plan Cycle' with 'Unit D&IE 5-Year Plans - NEW (1) Current' selected. Below the dropdown are several unchecked checkboxes: 'Title Page', 'Comments', 'Field Numbers', 'Files as attachments (Requires Adobe XI or higher)', 'Linked Goals', and 'Export to Microsoft Word® (Requires Word 2010 or higher)'. A note at the bottom of the checkboxes reads: 'Save the Word file when prompted. Do not open it directly from your browser.' At the bottom right of the dialog, there are two buttons: 'Submit' and 'Cancel'. A red arrow points to the 'Submit' button.

Export a PDF of Just One Unit Goal
From the Goal view, click on the *View PDF* 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**

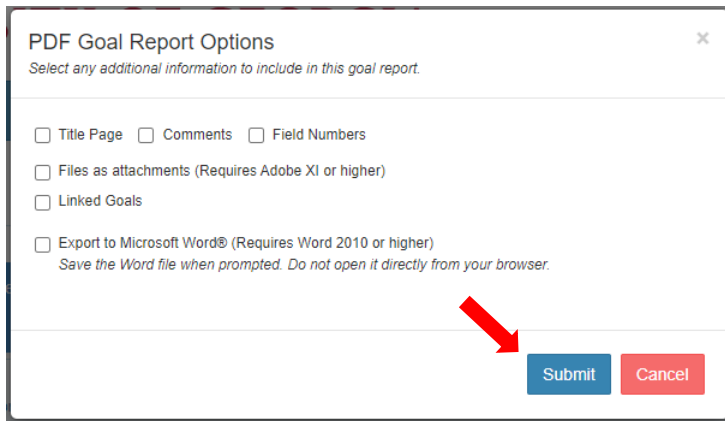
View PDF Edit Link [0] Delete Close Reporting Cycle: Unit D&E 5-Year Plans - NEW

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

The University has created a uniform report for Unit Diversity & Inclusive Excellence Plans, so you don't need to click on any of the radio buttons below.



PDF Goal Report Options ×

Select any additional information to include in this goal report.

Title Page Comments Field Numbers

Files as attachments (Requires Adobe XI or higher)

Linked Goals

Export to Microsoft Word® (Requires Word 2010 or higher)
Save the Word file when prompted. Do not open it directly from your browser.

Submit Cancel