STRATEGIC PLANNING REPORTS MANUAL

How to submit reports using the TTU Strategic Planning Report TracDat/SharePoint (TSO) Site

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**Why Have I Received This Manual?**

You’ve received this manual because you’re responsible for submitting your department or unit’s annual strategic planning report, and have completed a training session on the SharePoint and TracDat software platforms. You’ve communicated with staff from the Office of Planning and Assessment (OPA), have set up your account, and are ready to do your report.

This manual will walk you through the reporting process from logging in to TracDat/SharePoint to submitting your report. By following this process, you’ll be able to submit your full report.

Contact Katie Garner at the Office of Planning and Assessment (806-742-1505) to get a TracDat/SharePoint account if you don’t have one, or to troubleshoot if you can’t access it.

**Why Do I Need to Submit a Report?**

In 2010, Texas Tech University revised its 5-year institutional strategic plan, *Making it possible*.... This plan will guide university activity and development through 2015. You can review the 2010 plan at the TTU website: [http://www.ttu.edu/stratplan/](http://www.ttu.edu/stratplan/)

Your submitted report will provide the university administration with evidence that your department or unit is operating in line with the vision, mission, and five strategic priorities in the strategic plan. Evidence reported by each unit will help the university to track accomplishments across campus, and ensure that all unit activities are coherent with TTU’s strategic goals.

**What Will My Report Be Based On?**

Your annual report will address the following strategic priorities from the 2010 plan:

1. Increase Enrollment and Promote Student Success
2. Strengthen Academic Quality and Reputation
3. Expand and Enhance Research
4. Further Outreach and Engagement
5. Increase and Maximize Resources

You will enter quantitative or qualitative data into TracDat/SharePoint for each priority to show how your unit has met each of these outcomes. Every unit is different: not all departments are academic or do direct research work, and so each unit’s report will include different kinds of data and responses. Your report will be complete as long as it addresses all five priorities and provides narrative or numerical data relevant to your unit as evidence for meeting each one.

The Office of Planning and Assessment (OPA) has prepared a strategic plan data chart showing the kinds of data that you might enter. This report, Strategic Plan Data Chart, is located on the right-hand side of the TTU Strategic Plan Report TracDat/SharePoint site. If you need help identifying other appropriate data, contact OPA at (806) 742-1505.
PREPARING ACCOMPLISHMENT NARRATIVES
As well as entering priority-specific data, you’ll also write and upload a short accomplishment narrative for each strategic priority: (1) Increase enrollment and promote student success; (2) Strengthen academic quality and reputation; (3) Expand and enhance research and creative scholarship; (4) Further outreach and engagement; and (5) Increase and maximize resources.

Each narrative will be a paragraph of 100-500 words that describes your unit’s accomplishments for the last calendar year (e.g. January 1-December 31, 2013). These narratives will allow you to showcase any unit achievements not covered by the results.

WHAT TO INCLUDE IN AN ACCOMPLISHMENT NARRATIVE
Each narrative should address the following information:

- Description and examples of how your degree program directly or indirectly impacts each strategic outcome
- Description and examples of how your degree program assesses each strategic outcome
- Information on ways that the assessment of each strategic outcome has changed in the last year
- A summary of faculty meetings or other formal discussions about these strategic outcomes
- Description of changes/improvements made to increase program area performance in relation to each strategic outcome
- Highlights of particularly impactful improvements and accomplishments

WHERE WILL MY DATA GO?
Data that you enter into TracDat/SharePoint will be copied into the TracDat database, where the Office of Planning and Assessment (OPA) monitors institutional effectiveness outcomes for the whole campus. OPA uses TracDat data as evidence for internal and external reports to the university president, Board of Regents, and regional accrediting agencies.

Because entered data goes directly into TracDat, once you’ve submitted it, you won’t be able to delete it. If you find that you’ve entered duplicate or incorrect data, you’ll need to contact the Office of Planning and Assessment. OPA staff will then work with you to correct your report.


What Do I Need to Get Started?

Before beginning your report, make sure you have access to the following:

- Your eRaider account username and current password
- An active internet connection and fully functional browser
  The illustrations in this manual show Firefox browser, the recommended browser for this process (Chrome is currently not recommended).
  Disable your browser’s pop-up blocker.
- An active Strategic Planning SharePoint account
- The URL for the TracDat/SharePoint site
  (https://sharepoint2010.itts.ttu.edu/opa/stratplanSP2010/SitePages/Home.aspx)

Also consider having these references nearby:

- The 5 strategic plan priorities
  (http://www.depts.ttu.edu/opa/docs/2010_Strategic_Plan_Priorities.pdf)
- Strategic Plan Data Chart (Linked on the left-hand side of the TracDat/SharePoint home page)
- Your unit’s IR Strategic Plan Data Set, which is the source for any results you report
  This data set is linked on the right-hand side of the TracDat/SharePoint home page.

Something to Remember

You cannot manually delete your report once you have entered it into TracDat/SharePoint.

Avoid spelling errors in your report by drafting text results in Word and using the spell-checking tool to catch any typos or grammar errors. Then copy your checked responses into a plain text program (like Notepad), and paste the plain text paragraphs from the plain text program into TracDat/SharePoint. Plain text programs strip documents of all extra formatting like italics, bolding, and underlines. Minimizing how much formatting you include in your responses will simplify the data entry process and reduce the chance of errors in the final report.

Logging Into SharePoint

Follow these steps to log into SharePoint.

1. Open your internet browser.

   Enter the SharePoint URL,
   https://sharepoint2010.itts.ttu.edu/opa/stratplanSP2010/SitePages/Home.aspx
   , into the browser address bar.

   Click Go in your browser, or hit Enter/Return on your keyboard. The log-in page will load.
2. A dialog box will open

Enter your eRaider username into the **User name** box, using the format: TTU\eraider.

Your eRaider username is not case-sensitive. Do not insert any spaces between the
backslash [\] and your username.

Enter your eRaider password into the **Password** box.

Your password is case-sensitive.

Click **OK**.
Add any ActiveX control add-ons if your browser prompts you to. These add-ons will allow your browser to display SharePoint accurately. Also, please select Show All Content at the bottom of the page for dashboard use.

The SharePoint homepage will load.

**Adding a Result to Priority 1**

By following the tasks in this section, you’ll add a result to your unit report for Priority 1, **Increase Enrollment and Promote Student Success**. The results you report will come from the data sources listed in the Data Source Chart prepared for the 2013 strategic plan.

1. On the TracDat/SharePoint homepage, move your cursor towards the arrow beside **Priorities**.
Click on the arrow beside **Priorities**

The section will expand, showing the 5 strategic priorities in a list.
Click on the arrow beside **Priority 1: Increase Enrollment and Promote Student Success**.

The section will expand to show a table of priority outcomes, and other expandable categories: **Means of Assessment and Results**.

3. To begin reporting results, click on the icon beside **Results**.
   
   The **Add Result** dialog box will pop up.

4. Click a radio button to select which assessment method you have used.
The sample assessment method for this priority is *Accomplishments*. Scroll down within the *Add Result* dialog box to complete the remaining fields.

5. Type or paste your result into the *Result* field.
The sample result for this Priority is *Just a Test* for the accomplishments narrative. If you don’t have data for a particular means of assessment for the year you’re reporting, type “Data Unavailable” e.g. “Data Unavailable for 2013” in the Result field.

6. For the Result Date field, TracDat/SharePoint automatically selects the date you are entering in results. Please leave this default date.
7. Click the **Result Type** field to show options **Goal Not Met, Inconclusive, and Goal Met**.
Click on any one of these options to select it.

8. Click the **Action Status** field to show options **No Action Needed, Action in Progress, Action Complete, and Action To Be Defined**.
Click on any one of these options to select it.
9. For the **Action Status Update Date** field, SharePoint automatically selects today’s date. The Action Status Update Date is the date when you entered data. Please don’t amend the automatically selected date.

10. Click **Save** to save your data. A confirmation message will pop up.

Click **OK**, and the **Add Result** dialog box will close.

11. Repeat steps 1-10 to add and save additional results.

Each time you save data, your browser will refresh and you’ll return to the **TracDat Navigator Web Part** of TracDat/SharePoint.
PREVIEWING MY REPORT

You can use the **TracDat Report Web Part** of the TracDat/SharePoint homepage to run assessment reports based on the data you have entered.

1. Click on the arrow beside **Account Information**.
2. Click **run** in the third, far-right column of the table.

The four-column Unit Assessment Report displays all of your unit’s assessment results and action plans. This allows you to preview your data and confirm that you’ve entered it all accurately.

A new window will pop up titled **TracDat Report Viewer**.

![Image of the TracDat Report Viewer]

You can view and print your unit assessment report in three formats: .PDF (print), .doc (Microsoft Word), and .html (web).

3. The title within the **Report Title** field is a default. You can edit the **Report Title** with your own unique name by deleting the default and replacing it with your desired name.

   If you wish to preview all of your results, skip step 5 and go to step 6.

4. If you only want to display 2013 priorities and data, select **Active** next to Outcome Status.
5. To preview results from a specific time period, select the start and end dates in the **Result Date** field.
   Type the date in the format m/d/yyyy, or click on the calendar beside each field and click on the date you want.

6. Click **Open Report**.
   When the report has loaded, check it for accuracy.
   If you are satisfied with the report, print it or save the file to your hard drive. If not, follow the instructions in **Editing your Report**.

**EDITING MY REPORT**

This section will help you if you have entered your results, previewed it, and found some errors. As noted in something **to Remember**, you cannot delete your data entries but you can edit them by following the procedures on the next page

1. Return to the **TracDat Navigator Web Part** of the site.

2. Click the arrow beside **Priorities** to expand the section.
3. Click the arrow beside the priority that you want to edit.
4. Click the arrow beside **Results**. A list of your entered results will expand.
5. Beside the result you want to edit, click on the chart/pencil icon ( ). A new window titled Edit Result will pop up.

6. Edit your field. If you want the Office of Planning and Assessment to delete an item, then type “Please delete this item” in the data field. Click Save. A confirmation message, Your data has been successfully saved, will pop up. Click OK. Follow the procedures in Previewing My Report to see and print your edited report.

**Fixing Common Problems**

If you have difficulty following these procedures for reporting in TracDat/SharePoint, notice any missing steps in the instructions, or need help with your TracDat/SharePoint account, please contact the Office of Planning and Assessment (806-742-1505). Your calls will help the staff to improve the SharePoint platform and the training and help materials that users receive.

**Finding Helpful Resources**

The following resources may help you with drafting your annual strategic assessment report. Please let the OPA staff know if you find another useful resource that isn’t listed below.

- Strategic Plan Frequently Asked Questions (FAQs) (Linked on the left-hand side of the TracDat/SharePoint homepage)
- The TTU Strategic Plan Priorities (http://www.depts.ttu.edu/opa/docs/2010_Strategic_Plan_Priorities.pdf)
HOW TO RETREIVE KPI DATA

The Office of Planning and Assessment will enter all KPI information into TracDat/Sharepoint for academic departments and colleges. If you would like to view your KPI data report, you may visit https://cognos.texastech.edu.

*Non-academic departments, centers and institutes will not have KPI data to review.

SUBMITTING YOUR REPORT

Once you have completed entering your results, please click the Submit button on the upper left-handed side of the Home Page. This allows us to keep track of all submitted reports.