Entering Your Objectives into the Planning and Assessment System (Xitracs)
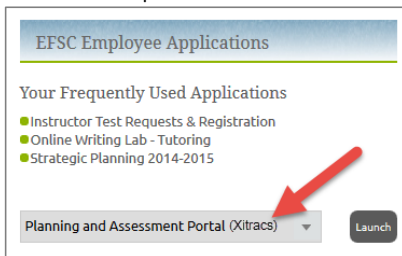
Accessing Planning and Assessment Portal via Email

Once you are added to an objective, you should receive an email with a direct link to the Planning and Assessment Portal (Xitracs). This will bring you directly to the objective plan page you were assigned to. Proceed to step 4 below to begin. *NOTE: The emailed link expires after three days. If the link is no longer active, or if you do not have access to the email, begin at step 1 below.*

An example of a fully completed objective can be found beginning on page 5 for your reference.

Accessing Planning and Assessment Portal (Xitracs) via MyEFSC

1. To access the Planning and Assessment Portal (Xitracs) without the emailed link, go to the EFSC Website, then click MyEFSC under EFSC Logins in the upper right. Log in to MyEFSC using your B# and PIN.

2. Make sure you are on either the Faculty or Staff tab. In the EFSC Employee Applications section click on the drop-down menu and select "Planning and Assessment Portal" and click "Launch."


3. You will now be logged into the Planning and Assessment Portal (Xitracs). On the right you will see that you have a section that requires your input. Click "View" to open the section.
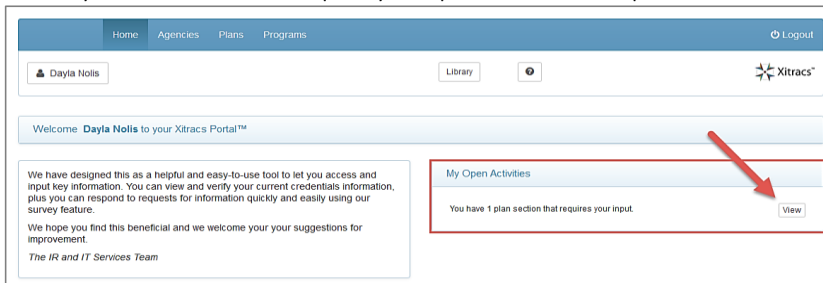
4. Click "Open" to work on the Objective.
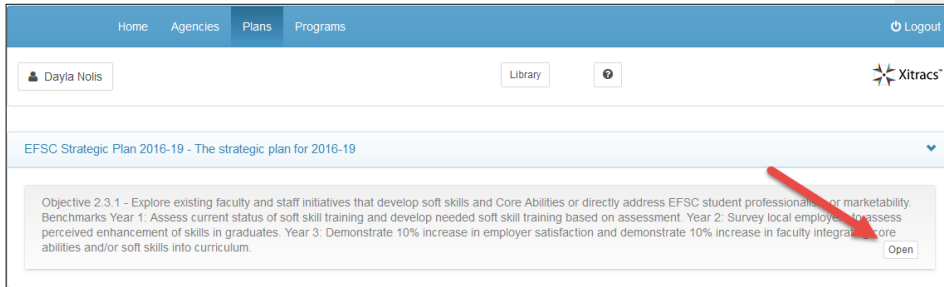
5. You will now see something similar to the screen below with your Objective stated at the top and the fields to be filled in below. First, click the "Show All" button to expand all the fields.
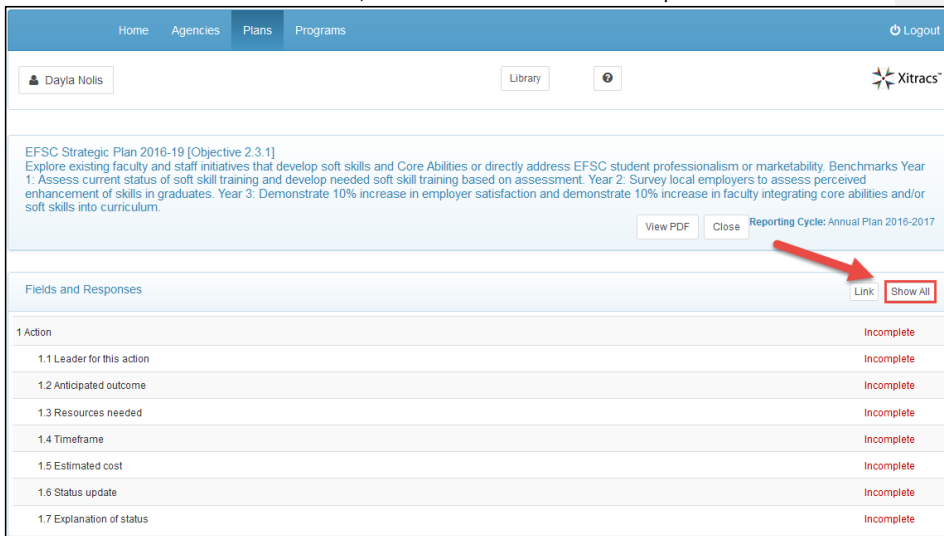
6. You will see instructions (highlighted in the screenshot below) for each section prompting you on what to do. Click the "Edit" button to insert the new action. *IMPORTANT NOTE: If you see green "Complete" indicators next to the action fields, that means someone else has already entered an action for this objective. Be careful not to edit or delete any of their work. In this case, instead of "Edit" you will click the "Add new" button next to "1 Action" to create your own new action.*
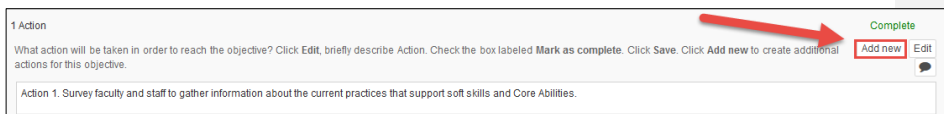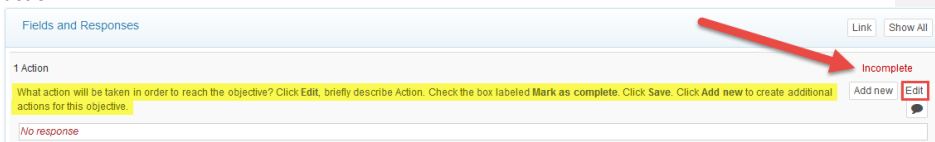
7. A new window will appear where you will 1) Type or copy and paste your objective into the blank box, 2) Check the box next to "Mark as complete," and 3) Click "Save" when done.

8. You will now see that your action has been successfully added and you will see a green "Complete" message in the upper right. *NOTE: If you do not see a green "Complete" message, you may have forgotten to check the "Mark as complete" box. Simply click the "Edit" button again, check the box, and click "Save."*

9. Next, click on "1.1 Leader for this action" to expand the 1.1 Leader for this action section and follow steps 6 – 8 to enter the person in charge of this action along with their position (in most cases this will be you).

10. Fill in the "1.2 Anticipated outcome," "1.3 Resources needed," "1.4 Timeframe," and "1.5 Estimated cost" fields following the same steps 6 - 8. Examples of these fields can be found on page 5. *NOTE: If there is no cost, simply enter a zero. If there is a cost involved, you may attach quotes or budget estimates when possible by clicking the "File +" button.*

11. Leave the "1.6 Status update" and "1.7 Explanation of status" fields alone for now. Those fields will be entered in the future at various points throughout the strategic planning cycle.

12. If you have an additional action for this same objective, scroll up to the "1 Action" section and click the "Add new" button. A window will pop-up asking if you are sure you want to add a new action, click "OK." *NOTE: Likewise, if you have multiple outcomes for a single action, you can add new outcomes as needed.*
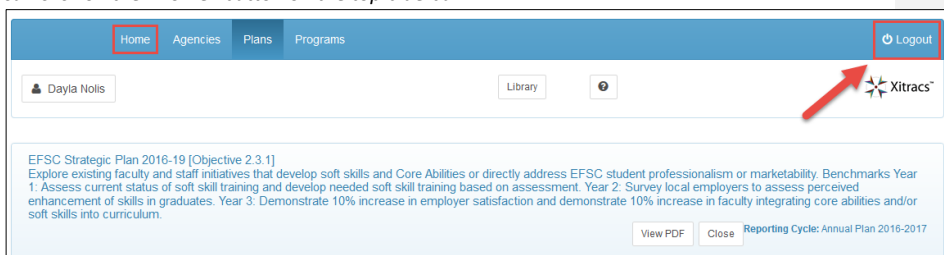

13. The new action will appear below the first action's corresponding fields. Scroll down until you see the new "2 Action" section. Follow steps 6 – 8 to enter the action and corresponding fields for that action.

14. When you are finished all of the work you have done is already saved. Click the "Logout" button in the upper right to logout of the system. *NOTE: If you were assigned to other objectives, you can click on the "Home" button on the top blue bar.*

Example Objective

Objective 2.3.1 Explore existing faculty and staff initiatives that develop soft skills and Core Abilities that directly address EFSC student professionalism or marketability*. Bob Stover will manage.*

1 Action

Action 1. Survey faculty and staff to gather information about the current practices that support soft skills and Core Abilities.

1.1 Leader for this action

Mark Quathamer, Research Coordinator

1.2 Anticipated outcome

A survey completed with appropriate and adequate information. This will determine what practices are being used at the College, where they are in use and where faculty believes they are being successful. It will focus on activities and instruction in the College's core abilities and these soft skills identified by the National Career Service: communication, making decisions, showing Commitment, Flexibility, time management, Leadership Skills, creativity and innovation, problem solving skills, being a team player, accepting responsibility, ability to work under pressure, positive attitude, being dependable, coaching co-workers, fitting into the company's culture, voicing opinions while being open to feedback, taking initiative, and developing new work processes.

1.3 Resources needed

Composition of survey by Research director staff; assistance from Career Center (Heather Allen) to develop questionnaires; Communications and Marketing to help promote participation; Research director to analyze results with Career Center participation.

1.4 Time frame

Fall 2016

1.5 Estimated cost

$0

1.6 Status Update

1.7 Explanation of Status

2   Action

Action 2. Identify trends from the survey results, including the skills being emphasized and skills that might need more efforts targeting their development.

2.1 Anticipated outcome

Commented [MQ1]: Is this how the numbering is for the second action? I thought it would be 2, 2.1, 2.2 etc.

A document that identifies the scope of current instruction in these areas and the strengths and weaknesses, with recommendations for improvements college wide. The results of the survey in Action 1 will provide impetus for interviews with appropriate faculty and staff and for gathering information about best practices at other Colleges.

2.2 Leader for this action

Heather Allen, Career Center

2.3 Resources needed

Assistance with survey assessment- Dr. Mark Quathamer in Planning and Assessment; feedback from 2.3 Initiative team and involvement of faculty involved in Core Abilities and Soft Skills.

2.4 Time frame

Spring 2017

2.5 Estimated cost

$0

2.6 Status Update

2.7 Explanation of Status