

Strategic Planning TracDat User Guide

March 11

2014

Step by step guide on using TracDat for strategic planning.

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LOGIN INSTRUCTIONS

URL Located Here: <https://gcccd.tracdat.com/tracdat/>.



The screenshot shows the login interface for TracDat. At the top left is the TracDat logo, which consists of a stylized 'T' made of blue and green dots followed by the word 'tracdat.' in a sans-serif font. Below the logo is the Grossmont-Cuyamaca Community College District logo, featuring a green square with a white 'G' and a white 'C' inside a circle. To the right of the college logo is the text 'GROSSMONT-CUYAMACA COMMUNITY COLLEGE DISTRICT'. On the right side of the page is a white box titled 'Account Login'. Inside this box are two input fields: 'Username: *' and 'Password: *', each followed by a white rectangular input field. Below these fields is a yellow button with the text 'Login' in black.

1. Enter your user name (firstname.lastname)
2. Enter your password. (The default password is “password”)
3. Click the Login button.

STRATEGIC PLANNING HOMEPAGE

After you login for the first time, you should see the homepage for your department.

The screenshot shows the TracDat Enterprise v4.6.1.3 interface. The user is logged in as 'pamela.wright'. The selected unit is 'Research, Planning, & Institutional Effectiveness'. The navigation menu includes 'Home', 'Department', 'Goals & Activities', 'Plan Updates', 'Reports', and 'Documents'. The 'Summary' tab is selected, showing the following data:

Due Date	Subject	Notes/Instructions
No assignments assigned to you.		

Due Date	Source	Assigned To
No overdue assignments.		

Goals & Activities Summary	
Total Goals:	3
Total Activities:	14
Last Plan Update:	11/15/2013
Last Action:	11/15/2013
Last Follow-Up:	
Total Resource Requests:	1
Goals Without Activities:	0

Plan Updates Summary	
Total Plan Updates:	13
Total Actions:	6
Plan Updates Without Actions:	7

The strategic planning homepage will show any assignments given to you, the number of department goals and activities that have been entered into TracDat, and the number of strategic planning updates/action plans that you have created to accomplish your department goals and activities.

ENTERING STRATEGIC PLANNING TEXT

To begin entering information for your strategic planning, click on the “Department” tab at the top of the page and the “General” link. The page will display text boxes for the department name, mission, and resource needs. Click on the “?” (to the right of the text box) for a description of what to include in the text box. Be sure to click on “Save Changes” periodically in order to preserve your work!

Selected Unit: Research, Planning, & Institutional Effectiveness

Home | Department | Goals & Activities | Plan Updates | Reports | Documents

General | Personnel | Accomplishments

Research, Planning, & Institutional Effectiveness > Department > General

Department Name: Research, Planning, & Institutional Effectiveness

Mission Statement: The Office of Research, Planning, and Institutional Effectiveness will foster continuous quality improvement of student learning in the Grossmont-Cuyamaca Community College District by providing innovative, timely, relevant, and accurate information that drives decision-making at all levels in the District.

Resource Needs:

There are two other links below the “Department” tab. They are “Personnel” and “Accomplishments.” Click on the “Personnel” link to see the personnel assigned to your department. You can add new personnel by clicking the “Assign Personnel to Unit” button at the bottom of the page.

Selected Unit: Research, Planning, & Institutional Effectiveness

Home | Department | Goals & Activities | Plan Updates | Reports | Documents

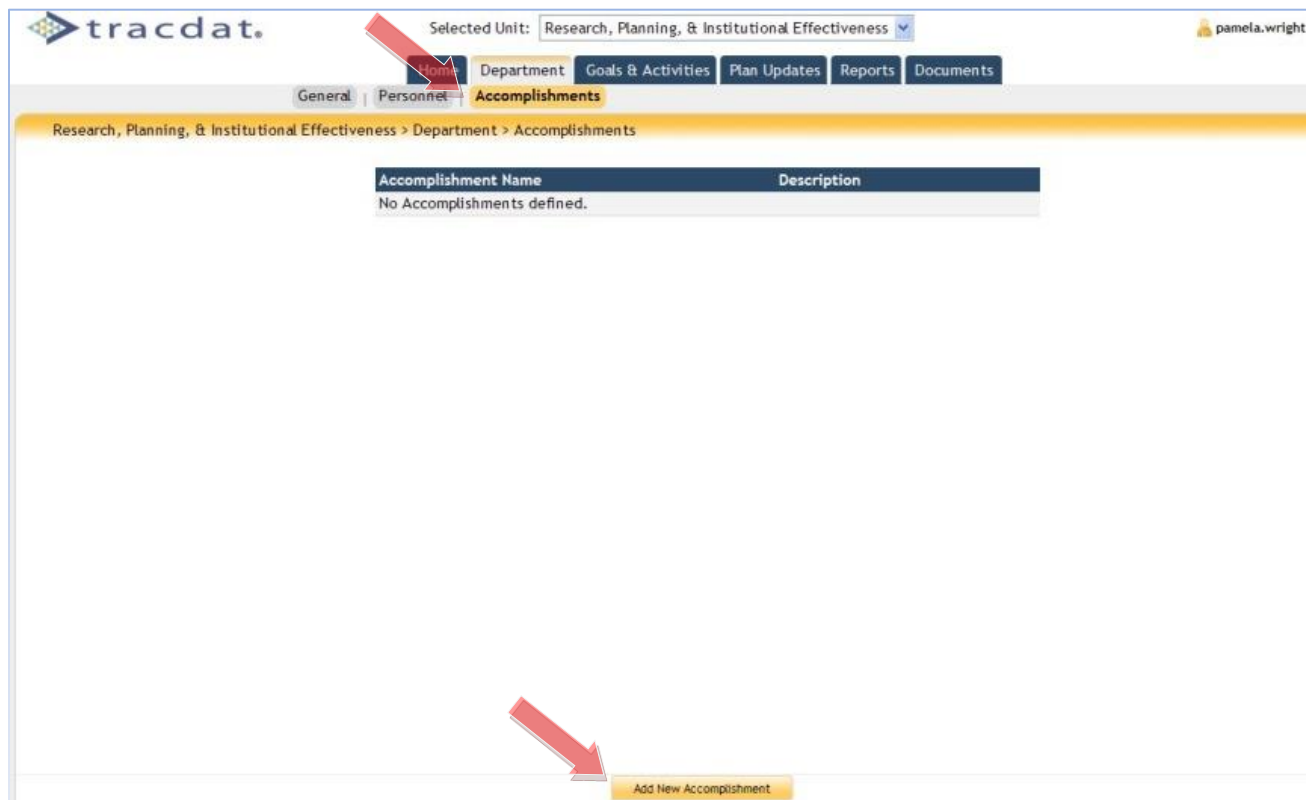
General | Personnel | Accomplishments

Research, Planning, & Institutional Effectiveness > Department > Personnel

Last Name	First Name	Title	Email	Role
Tarman	Christopher		christopher.tarman@gcccd.edu	Email Only

Assign Personnel to Unit

This page appears when you click the “Accomplishments” link. You can add a new accomplishment by clicking the “Add New Accomplishment” button.

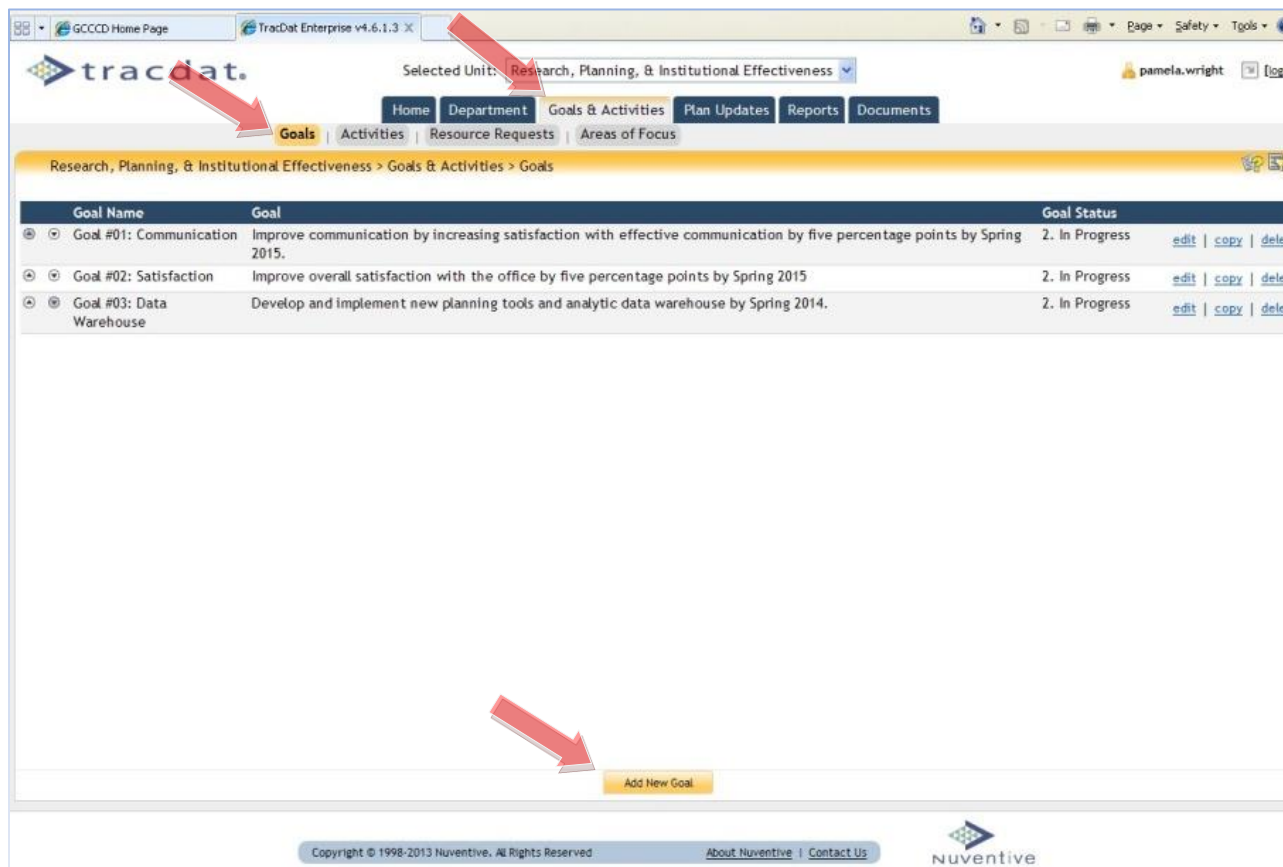


The screenshot displays the TracDat interface for the 'Accomplishments' section. At the top, the 'Selected Unit' is 'Research, Planning, & Institutional Effectiveness'. The navigation menu includes 'Home', 'Department', 'Goals & Activities', 'Plan Updates', 'Reports', and 'Documents'. The 'Accomplishments' tab is active. Below the navigation, the breadcrumb trail reads 'Research, Planning, & Institutional Effectiveness > Department > Accomplishments'. A table with two columns, 'Accomplishment Name' and 'Description', is present, with the text 'No Accomplishments defined.' displayed below it. A red arrow points to the 'Add New Accomplishment' button located at the bottom right of the page.

The accomplishments entered in this area are not necessarily part of the planning process. They may be departmental accomplishments you want to document for internal use or for reporting out (e.g., monthly Board updates).

PROGRAM GOALS & ACTIVITIES

To view goals for your department/unit, click on the “Goals & Activities” tab at the top of the page. Make sure the “Goals” link is selected below. To add a new goal, click on the “Add New Goal” button at the bottom of the page.



The screenshot shows the TracDat Enterprise v4.6.1.3 interface. The selected unit is "Research, Planning, & Institutional Effectiveness". The navigation menu includes "Home", "Department", "Goals & Activities", "Plan Updates", "Reports", and "Documents". The "Goals & Activities" section is active, showing a table of goals. The table has columns for "Goal Name", "Goal", and "Goal Status". Three goals are listed:

Goal Name	Goal	Goal Status
Goal #01: Communication	Improve communication by increasing satisfaction with effective communication by five percentage points by Spring 2015.	2. In Progress
Goal #02: Satisfaction	Improve overall satisfaction with the office by five percentage points by Spring 2015.	2. In Progress
Goal #03: Data Warehouse	Develop and implement new planning tools and analytic data warehouse by Spring 2014.	2. In Progress

At the bottom of the page, there is an "Add New Goal" button. The footer includes "Copyright © 1998-2013 Nuventive, All Rights Reserved", "About Nuventive | Contact Us", and the Nuventive logo.

The following screen will appear after the “Add New Goal” button has been clicked. Enter the goal information in the dialog boxes. Select the appropriate year from “Goal Year Implemented”.

The screenshot shows the TracDat web application interface for adding a new goal. The browser window title is "TracDat Enterprise v4.6.1.3". The page header includes the TracDat logo, the selected unit "Research, Planning, & Institutional Effectiveness", and the user name "pamela.wright" with a "log out" link. The navigation menu includes "Home", "Department", "Goals & Activities", "Plan Updates", "Reports", and "Documents". The breadcrumb trail is "Research, Planning, & Institutional Effectiveness > Goals & Activities > Goals > Add New Goal".

The form fields are as follows:

- Goal Name:** A text input field.
- Goal:** A large text area for describing the goal.
- Goal Year Implemented:** A dropdown menu with a list of years: 2010 - 2011, 2011 - 2012, 2012 - 2013, 2013 - 2014, 2014 - 2015, and 2015 - 2016.
- Goal Status:** A dropdown menu.
- Start Date:** A date input field with a calendar icon.
- Inactive Date:** A date input field with a calendar icon.
- Goal Priority:** A dropdown menu.
- Key Performance Indicator(s):** A large text area for describing the KPIs.

At the bottom of the form, there are three buttons: "Save Changes", "Discard Changes", and "Return".

For “Goal Status” and “Goal Priority”, use the drop-down menus. The options for “Goal Status” are shown below.

Selected Unit: Research, Planning, & Institutional Effectiveness

Home | Department | **Goals & Activities** | Plan Updates | Reports | Documents

Goals | Activities | Resource Requests | Areas of Focus

Research, Planning, & Institutional Effectiveness > Goals & Activities > Goals > Add New Goal

Goal Name:

Goal:

Goal Year Implemented:

Goal Status:

Start Date:

Inactive Date:

Goal Priority:

Key Performance Indicator(s):

Save Changes | Discard Changes | Return

To view activities for your department/unit, click on the “Goals & Activities” tab at the top of the page. Make sure the “Activities” link is selected below. To add a new activity, click on the “Add New Activity” button at the bottom of the page.

Selected Unit: Research, Planning, & Institutional Effectiveness

Home | Department | **Goals & Activities** | Plan Updates | Reports | Documents

Goals | **Activities** | Resource Requests | Areas of Focus

Research, Planning, & Institutional Effectiveness > Goals & Activities > Activities

Goal Name:

Goal:

Date Added	Activity Status	Activity	Target Completion Date	Active?
6/19/2013	2. In Progress	Activity #1.1 - Develop and publish annual research agenda	Spring 2013	Y edit copy delete
6/20/2013	1. Accomplished	Activity #1.2 - Redesign research request process	Spring 2012	Y edit copy delete
7/9/2013	3. No Progress	Activity #1.3 - Develop customer feedback mechanism	Spring 2014	Y edit copy delete
7/9/2013	2. In Progress	Activity #1.4 - Develop more user-friendly RPIE website	Fall 2013	Y edit copy delete
7/9/2013	2. In Progress	Activity #1.5 - Develop survey research calendar	Spring 2013	Y edit copy delete
7/9/2013	2. In Progress	Activity #1.6 - Implement an IRB and external research review process	Spring 2014	Y edit copy delete

Add New Activity | Return To Goal

The following screen will appear after the “Add New Activity” button has been clicked. Enter the activity information in the dialog boxes. Many activities are on-going. On-going activities are not documented here because they are the result of previous planning efforts which have become part of day-to-day operations.

The screenshot shows the TracDat Enterprise v4.6.1.3.3 interface. The user is logged in as pamelawright. The selected unit is 'Research, Planning, & Institutional Effectiveness'. The breadcrumb trail is: Research, Planning, & Institutional Effectiveness > Goals & Activities > Activities > Add Activity. The form contains the following fields:

- Goal Name: Goal #01: Communication
- Goal: Improve communication by increasing satisfaction with effective communication by five percentage points by Spring 2015.
- Activity Status: (Drop-down menu)
- Activity: (Text area)
- Target Completion Date: (Text area)
- Person Responsible: (Text area)
- Active:
- Activity Year Implemented: (Drop-down menu)

At the bottom of the form, there are four buttons: 'Save Changes', 'Discard Changes', 'Return', and 'Assign'. A red arrow points to the 'Assign' button.

You can see that the top two fields are grayed out and you can't edit them (this information is pulled from the Goals page). The fields you can edit are:

1. Activity Status (Drop Down Menu)
2. Activity (e.g., “Activity #1.3 – Develop customer feedback mechanism”).
3. Target Completion Date (e.g., list by term and year: Fall 2014 or Spring 2015)
4. Person Responsible (use job titles, not actual names)
5. Active (Very important to click the checkbox to make the activity “Active”)
6. Activity Year Implemented (Select the year that you will begin working on the activity: 2014-2015)

After you enter information into the fields you have the option to Save Changes or Discard Changes. You may also assign activities by clicking the “Assign” button. Assigning activities is discussed in the next section of this manual.

ASSIGNING ACTIVITIES

If you decided to assign the activity to one of your colleagues and you have pressed the “Assign” button from the previous page, the following will appear on your screen. This is the form you fill in to assign the activity. You can only assign activity updates to employees who have been uploaded into the system and assigned to your department. These names will appear in the “Assign To:” field.

Selected Unit: Research, Planning, & Institutional Effectiveness

Home | Department | **Goals & Activities** | Plan Updates | Reports | Documents

Goals | **Activities** | Resource Requests | Areas of Focus

Research, Planning, & Institutional Effectiveness > Goals & Activities > Activities > Assign Activity

Provide: Data Only
 Data and Plan Update
 Data, Plan Update and Action Plan

Put Documents in Repository Folder: Assignee(s) may choose Repository Folder

Assign To: Taman, Christopher

Due Date: 2/6/2014

February 2014

Sun	Mon	Tue	Wed	Thu	Fri	Sat
26	27	28	29	30	31	1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	1

Frequency: Once

Subject: Assignment from TracDat

Notes/Instructions: Activity Status: 3. No Progress
 Activity: Develop customer feedback mechanism

E-mail assignment to assignee:

CC E-mail:

Save Return

You can re-write the “Subject:” and “Note/Instructions:” fields to reflect what you would like to say in the email to the assignee.

Once you have filled in and checked the options you want, TracDat will send the assignee an email with a link and the pertinent information relating to the activity. Be sure to save your work by clicking the “Save” button.

RESOURCE REQUESTS

The next area on the second row of options is for resource requests. Click on the “Resource Requests” link. Each resource request is associated with a goal. Select the goal from the drop down menu titled “Goal Name” and click the “Add New Resource Request” button at the bottom of the screen.

Selected Unit: Research, Planning, & Institutional Effectiveness

Home Department Goals & Activities Plan Updates Reports Documents

Goals | Activities | **Resource Requests** | Areas of Focus

Research, Planning, & Institutional Effectiveness > Goals & Activities > Resource Requests

Goal Name: Goal #01: Communication

Goal: Improve communication by increasing satisfaction with effective communication by five percentage points by Spring 2015.

Resource Request	Related Activity
No Resource Requests defined.	

Add New Resource Request Return To Goal

The following screen will appear. The goal name and goal description are greyed out showing that the resource request is tied to this goal. To make a resource request for another goal, click the “Return” button to go back to the previous screen where you can select a different goal.

Selected Unit: Research, Planning, & Institutional Effectiveness

Home | Department | Goals & Activities | Plan Updates | Reports | Documents

Goals | Activities | Resource Requests | Areas of Focus

Institutional Effectiveness > Goals & Activities > Resource Requests > Add Resource Request

Goal Name: Goal #01: Communication

Goal: Improve communication by increasing satisfaction with effective communication by five percentage points by Spring 2015.

Resource Request: *

Related Activity:

Budget Year: * ?

Type of Request: *

Keycode: *

Object: *

Amount Requested: *

Amount Approved:

Save Changes | Discard Changes | Return | Assign

Copy the activity name and description in the text box labeled “Related Activity” (e.g., “Activity 1.3 – Develop customer feedback mechanism”).

Next, fill in the fields with your resource request information. The options for the “Type of Request” drop down menu are: Consultant, Equipment, Personnel, Technology, Training, Travel, and Other.

After you enter information into the fields you have the option to Save Changes or Discard Changes. You may also assign activities by clicking the “Assign” button. Assigning activities is discussed in the previous section of this manual.

LINKING WITH AREAS OF FOCUS

The next area on the second row of options designates area of focus. Click on the “Area of Focus” link. Each area of focus is associated with a goal or goals. In order to link the goals with the appropriate area(s) of focus, make sure to select the goal you want to link. This is done by selecting the goal from the dropdown menu labeled “Goal Name”. Next, check the boxes next to the corresponding area(s) of focus to which you want to link the goal. When you are done, click on “Save Changes” at the bottom of the screen.

Selected Unit: Research, Planning, & Institutional Effectiveness

Home | Department | **Goals & Activities** | Plan Updates | Reports | Documents

Goals | Activities | Resource Requests | **Areas of Focus**

Effectiveness > Goals & Activities > Areas of Focus

Goal Name: Goal #01: Communication

Goal: Improve communication by increasing satisfaction with effective communication by five percentage points by Spring 2015.

Goal Type	Goal
<input type="checkbox"/> Area of Focus 1	Student Access
<input checked="" type="checkbox"/> Area of Focus 2	Learning and Student Success
<input checked="" type="checkbox"/> Area of Focus 3	Value and Support of Employees
<input type="checkbox"/> Area of Focus 4	Economic and Community Development
<input type="checkbox"/> Area of Focus 5	Fiscal and Physical Resources
<input type="checkbox"/> District Services Goals	
Goal Type	Goal
<input type="checkbox"/> DS Goal	Increase organizational and environmental efficiencies

Save Changes | Discard Changes | Return To Goal

ADDING UPDATES TO YOUR STRATEGIC PLAN

To enter updates for your program, click on the “Plan Updates” tab at the top of the page. You will see the following screen. This screen will be populated with the goals that you previously entered. In order to see the latest plan updates, click the area marked “Show Plan Updates”. In the example below, Goal #02 is expanded so you can see the updates that have already been entered.

The screenshot shows the TracDat Enterprise v4.6.1.3 interface. The selected unit is "Research, Planning, & Institutional Effectiveness". The "Plan Updates" tab is active. The page displays three goals:

- Goal #01: Communication**: Improve communication by increasing satisfaction with effective communication by five percentage points by Spring 2015. A red arrow points to the "Show Plan Updates" link.
- Goal #02: Satisfaction**: Improve overall satisfaction with the office by five percentage points by Spring 2015. A red arrow points to the "Hide Plan Updates" link. This goal is expanded to show a table of updates:

Dept.	Goal	Date	Plan Update	Actions	Related Documents	Reporting Year	
		7/29/2013	Data will be collected in fall 2013. Both activities for this objective were accomplished.	1	0	2012 - 2013	edit add Action
Activity: Activity #2.1 - Develop tracking mechanism for projects							
Target Completion Date: Spring 2012							
		7/29/2013	Research Tracker has been transferred into Excel with the ability to filter and color code projects.	0	0	2012 - 2013	edit add Action
Activity: Activity #2.2 - Provide opportunities for RPIE staff professional development annually							
Target Completion Date: Spring 2013							
		7/29/2013	All RPIE team members attended the RP Group Conference in April. NSC workshop, CTE data reporting, and placement testing workshops were also attended by RPIE team in the spring.	0	0	2012 - 2013	edit add Action
- Goal #03: Data Warehouse**: Develop and implement new planning tools and analytic data warehouse by Spring 2014. A red arrow points to the "Show Plan Updates" link.

A red arrow at the bottom points to the "Add Plan Update" button.

Click on the “Add Plan Update” button at the bottom of the page to begin updating your strategic planning.

After clicking on the “Add Plan Update” button, the following screen appears. Click on “select” next to the goal that you would like to update.

Selected Unit: Research, Planning, & Institutional Effectiveness

Home Department Goals & Activities Plan Updates Reports Documents

By Unit

Research, Planning, & Institutional Effectiveness > Plan Updates > By Goal > Select Goal

Goal Name	Goal	Goal Status	
Goal #01: Communication	Improve communication by increasing satisfaction with effective communication by five percentage points by Spring 2015.	2. In Progress	select
Goal #02: Satisfaction	Improve overall satisfaction with the office by five percentage points by Spring 2015	2. In Progress	select
Goal #03: Data Warehouse	Develop and implement new planning tools and analytic data warehouse by Spring 2014.	2. In Progress	select

After selecting which goal you want to update, the following screen will open. Use the drop down menu to select “Activity”, “Resource Request” or “Dept Goal”. **All activities, resource requests, and department goals should be updated each year while they are actively in progress.** Since the update screens are similar for each type of update, this guide will only illustrate how to update an activity.

Selected Unit: Research, Planning, & Institutional Effectiveness

Home Department Goals & Activities Plan Updates Reports Documents

By Unit

Research, Planning, & Institutional Effectiveness > Plan Updates > By Goal > Select Goal

Goal Name	Goal	Goal Status	
Goal #01: Communication	Improve communication by increasing satisfaction with effective communication by five percentage points by Spring 2015.	2. In Progress	select
Goal #02: Satisfaction	Improve overall satisfaction with the office by five percentage points by Spring 2015	2. In Progress	select
Goal #03: Data Warehouse	Develop and implement new planning tools and analytic data warehouse by Spring 2014.	2. In Progress	select

Select Activity/Resource Request

Select: Activity

Activity Status	Activity	
2. In Progress	Activity #1 Dept. Goal annual research agenda	select
1. Accomplished	Activity #1.2 - Redesign research request process	select
3. No Progress	Activity #1.3 - Develop customer feedback mechanism	select
2. In Progress	Activity #1.4 - Develop more user-friendly RPIE website	select
2. In Progress	Activity #1.5 - Develop survey research calendar	select

If you select “Activity” from the drop down menu, the following page will appear. Select which activity you want to update.

The screenshot shows the TracDat Enterprise v1.6.1.3 interface. The selected unit is "Research, Planning, & Institutional Effectiveness". The breadcrumb trail is "Research, Planning, & Institutional Effectiveness > Plan Updates > By Goal > Select Goal".

Goal Name	Goal	Goal Status
Goal #01: Communication	Improve communication by increasing satisfaction with effective communication by five percentage points by Spring 2015.	2. In Progress select
Goal #02: Satisfaction	Improve overall satisfaction with the office by five percentage points by Spring 2015	2. In Progress select
Goal #03: Data Warehouse	Develop and implement new planning tools and analytic data warehouse by Spring 2014.	2. In Progress select

Activity Status	Activity	
2. In Progress	Activity #1.1 - Develop and publish annual research agenda	select
1. Accomplished	Activity #1.2 - Redesign research request process	select
3. No Progress	Activity #1.3 - Develop customer feedback mechanism	select
2. In Progress	Activity #1.4 - Develop more user-friendly RPIE website	select
2. In Progress	Activity #1.5 - Develop survey research calendar	select

A red arrow points to the "select" button for Activity #1.1. A "Return" button is located at the bottom of the dialog box.

After you select the activity you want to update, the following screen will open. Fill in the “Plan Update” box for the activity with a summary update for the activity you selected. Be sure to include the reporting year and evaluation regarding how much progress has been made.

Selected Unit: Research, Planning, & Institutional Effectiveness

Home Department Goals & Activities Plan Updates Reports Documents

By Unit

g, & Institutional Effectiveness > Plan Updates > Edit Plan Update

Goal: Goal #01: Communication : Improve communication by increasing satisfaction with effective communication by five percentage points by Spring 2015.

Activity: 2. In Progress - Activity #1.1 - Develop and publish annual research agenda

Target Completion Date: Spring 2013

Plan Update: *

Plan Update Date: * 2/10/2014

Reporting Year: *

Evaluation: *

Action Plan Related Documents

add Action

Action Date	Action	Follow-Up
No Actions defined.		

Save Changes Discard Changes Return Change Association Delete Plan Update

You may also add “Action Plans” to activities or goals if you want to document what still needs to be accomplished. If you want to “Relate” a document to your update (e.g., you have documentation of completing an activity), click on the “Related Documents” tab located under the “Reporting Year” dropdown field and then select the “Relate Document” link to the right.

Goal: Goal #01: Communication : Improve communication by increasing satisfaction with effective communication by five percentage points by Spring 2015.

Activity: 2. In Progress - Activity #1.5 - Develop survey research calendar

Target Completion Date: Spring 2013

Plan Update: * In spring 2013, a 2012-2018 survey calendar was developed and approved by the IRPC.

Plan Update Date: * 7/29/2013

Evaluation: * 1. Accomplished

Reporting Year: * 2012 - 2013

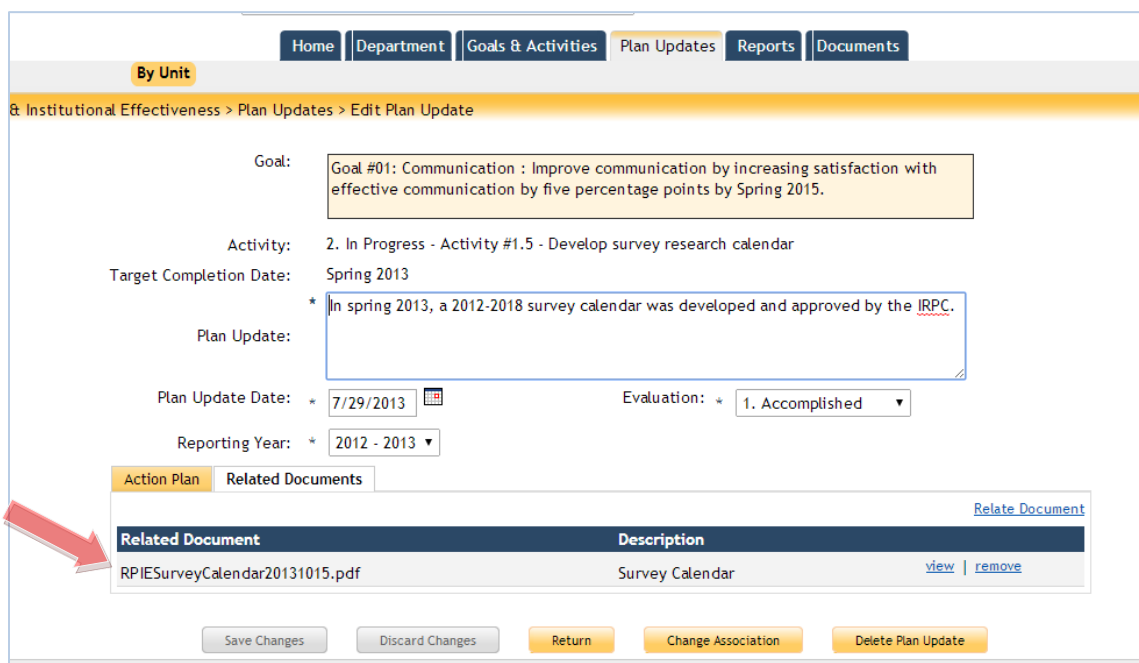
Action Plan Related Documents

Relate Document

After clicking on “Relate Document,” you may choose whether you want to link to a “New Document,” a “Document from the Repository,” or a “Previously Related Document.” It is recommended that all documents supporting your departmental plan should be contained within your document repository—therefore, make sure that you upload necessary files prior to relating documents here (see the last section of this guide on how to upload documents). Once you have selected “Document from the Repository,” the following screen appears:

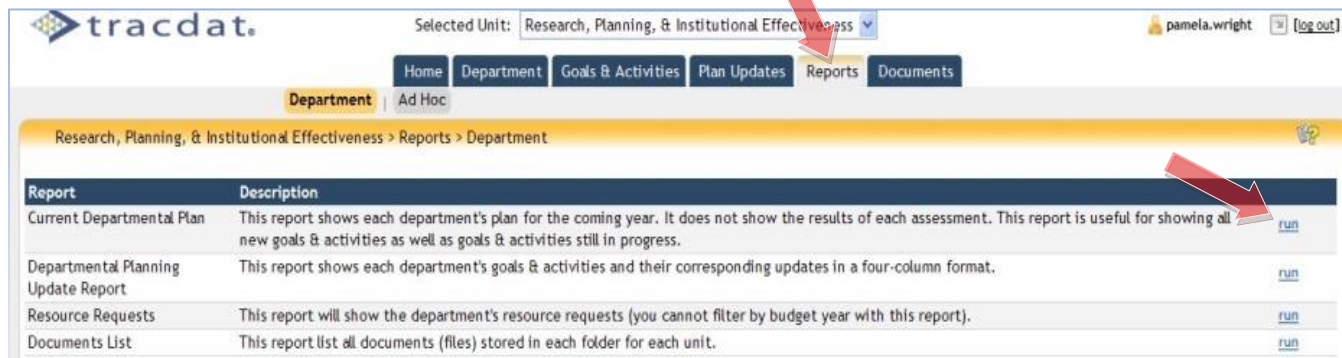


Find the document in your repository that you want to related to the update and then click on the “relate” link located to the right of the Document Description. Your update will now show a link to the related document.



RUNNING, SAVING, AND PRINTING REPORTS

Click on the “Reports” tab at the top of the page. You will see the following screen. Select “run” on the right hand side of the screen.



The screenshot shows the TracDat web application interface. At the top, the logo "tracdat." is on the left, and "Selected Unit: Research, Planning, & Institutional Effectiveness" is in the center. On the right, the user name "pamela.wright" and a "log out" link are visible. Below the header, there are navigation tabs: "Home", "Department", "Goals & Activities", "Plan Updates", "Reports", and "Documents". The "Reports" tab is selected and highlighted in yellow. Below the tabs, there is a breadcrumb trail: "Research, Planning, & Institutional Effectiveness > Reports > Department". A table lists several reports with their descriptions and "run" buttons on the right. The first row is "Current Departmental Plan" with a description: "This report shows each department's plan for the coming year. It does not show the results of each assessment. This report is useful for showing all new goals & activities as well as goals & activities still in progress." The other reports are "Departmental Planning Update Report", "Resource Requests", and "Documents List".

Report	Description	
Current Departmental Plan	This report shows each department's plan for the coming year. It does not show the results of each assessment. This report is useful for showing all new goals & activities as well as goals & activities still in progress.	run
Departmental Planning Update Report	This report shows each department's goals & activities and their corresponding updates in a four-column format.	run
Resource Requests	This report will show the department's resource requests (you cannot filter by budget year with this report).	run
Documents List	This report list all documents (files) stored in each folder for each unit.	run

After clicking “run”, the TracDat Report Viewer opens. On this page, there are many different fields that can be used to filter your strategic planning data. In order to save or print a complete report, do NOT click in any of the fields; however, if you want to filter the report (e.g., by goals/activity status), then click on the field you want to see (e.g., “2. In Progress”). You can make multiple selections by pressing and holding the “Ctrl” button while you click on the fields. You can “deselect” your options the same way.

To save the strategic planning to your document repository within TracDat, simply click on the “Save to Document Repository” button at the bottom of the page.

The screenshot displays the TracDat Report Viewer interface. The window title is "TracDat Report Viewer". There are two tabs: "Set Parameters" and "Preview Report". The "Preview Report" tab is active. The interface includes the following fields and options:

- Format:** PDF (suggested for Print) (dropdown menu)
- Layout:** Portrait (dropdown menu)
- Report Title:** Current Departmental Plan (text input field)
- Goal Statuses:** 1. Accomplished, 2. In Progress, 3. No Progress, 4. Inactive/Deleted (dropdown menu)
- Goal Year Implemented:** 2010 - 2011, 2011 - 2012, 2012 - 2013, 2013 - 2014, 2014 - 2015, 2015 - 2016 (dropdown menu)
- Hide Inactive Activities:**
- Activity Status:** 1. Accomplished, 2. In Progress, 3. No Progress, 4. Inactive/Deleted (dropdown menu)
- Include Accomplishments:**
- Include Resource Requests:**
- Include Institution Goals:**
- Include Reporting Unit Goals:**
- Include Department Goals:**
- Hide Inactive Goals:**
- Include Course Outcomes:**

At the bottom of the interface, there are three buttons: "Open Report", "Download as Zip", and "Save to Document Repository". A red arrow points to the "Save to Document Repository" button.

In the “Save to Document Repository” dialog box, select the folder in which you wish to save the document (using the drop down menu), rename the document, and click on the save button.

The screenshot shows the 'TracDat Report Viewer' interface with the 'Preview Report' tab active. The 'Save to Document Repository' dialog box is open, allowing the user to save the current report. The dialog box includes the following fields:

- Folder:** A dropdown menu showing 'DS Satisfaction Survey'.
- *Name:** A text input field containing 'AssessmentPlan'.
- Description:** A text area for additional information.
- save** button: A button to confirm saving the document.

Red arrows in the image point to the folder dropdown, the name input field, and the save button, indicating the steps to follow.

When you save the document in this manner, you can find it under the “Documents” tab in the main TracDat screen.

The screenshot shows the main TracDat interface. The 'Documents' tab is selected, and the 'Document Repository' is displayed. The breadcrumb trail shows 'Research, Planning, & Institutional Effectiveness > Documents > Document Repository'. The 'Show Folders For:' dropdown is set to 'Research, Planning, & Institutional Effectiveness'. A folder named 'DS Satisfaction Survey' is selected, and a document named 'DS Satisfaction Survey 2011' is listed in the table below.

Type	Document Name	Description	Last Modified	view	edit	delete
	DS Satisfaction Survey 2011		7/29/2013			

On the other hand, if you would like to save the report on your desktop or would like to print the document, then you need to select the “Open Report” button at the bottom of the page

The screenshot displays the 'TracDat Report Viewer' application window. The 'Set Parameters' tab is active, showing the following settings:

- Format: PDF (suggested for Print)
- Layout: Portrait
- Report Title: Current Departmental Plan
- Goal Statuses: 1. Accomplished, 2. In Progress, 3. No Progress, 4. Inactive/Deleted
- Goal Year Implemented: 2010 - 2011, 2011 - 2012, 2012 - 2013, 2013 - 2014, 2014 - 2015, 2015 - 2016
- Hide Inactive Activities:
- Activity Status: 1. Accomplished, 2. In Progress, 3. No Progress, 4. Inactive/Deleted
- Include Accomplishments:
- Include Resource Requests:
- Include Institution Goals:
- Include Reporting Unit Goals:
- Include Department Goals:
- Hide Inactive Goals:
- Include Course Outcomes:

At the bottom of the window, there are three buttons: 'Open Report', 'Download as Zip', and 'Save to Document Repository'. A red arrow points to the 'Open Report' button.

Next, you will see a .pdf version of the report appear in the window. At this point, you can either select the printer icon to print a draft of the report or you can click on the save to disk icon to save the document to an appropriate file on your computer.

Current Departmental Plan
Grossmont-Cuyamaca Community College District
Research, Planning, & Institutional Effectiveness

Research, Planning, & Institutional Effectiveness

Mission Statement: The Office of Research, Planning, and Institutional Effectiveness will foster continuous quality improvement of student learning in the Grossmont-Cuyamaca Community College District by providing innovative, timely, relevant, and accurate information that drives decision-making at all levels in the District.

Goal: Goal #01: Communication
 Improve communication by increasing satisfaction with effective communication by five percentage points by Spring 2015.

Goal Year Implemented: 2012 - 2013
Goal Status: 2. In Progress
Goal Priority: Medium
Key Performance % Familiar with services
Indicator(s): % Satisfied with communication

Activities			
Activity	Target Completion Date	Person Responsible	Active
Activity #1.1 - Develop and publish annual research agenda Activity Status: 2. In Progress	Spring 2013	Senior Dean of RPIE	Yes
Activity #1.2 - Redesign research request process Activity Status: 1. Accomplished	Spring 2012	Sr. Dean of RPIE	Yes
Activity #1.3 - Develop customer feedback mechanism Activity Status: 3. No Progress	Spring 2014	Sr. Dean of RPIE	Yes
Activity #1.4 - Develop more user-friendly RPIE website Activity Status: 2. In Progress	Fall 2013	Research Analyst Administrative Asst.	Yes
Activity #1.5 - Develop survey research calendar	Spring 2013	Sr. Dean of RPIE	Yes

DOCUMENTS

All documents or files associated with your departmental planning should be uploaded into TracDat for storage and documentation. Since TracDat is a “dynamic” planning software, saving reports of your plan after each update year will preserve a snapshot that documents your progress. It is recommended that you save these reports after each update. In addition, any data used to measure progress in meeting departmental goals should be stored in TracDat.

In order to add or organize documents associated with your strategic planning, select the “Documents” tab and the “Document Repository” link. The following page will appear. This page shows the folders you have created as well as the documents you have added. In order to add a new document, click the “Add New Document” button on the bottom of the page.

The screenshot shows the TracDat web application interface. At the top, the logo "tracdat." is visible on the left, and the user name "pamela.wright" and a "log out" link are on the right. Below the logo, a navigation menu includes "Home", "Department", "Goals & Activities", "Plan Updates", "Reports", and "Documents". The "Documents" tab is selected. Below the navigation menu, there are two sub-tabs: "Document Repository" (selected) and "Related Documents". A breadcrumb trail shows "Research, Planning, & Institutional Effectiveness > Documents > Document Repository".

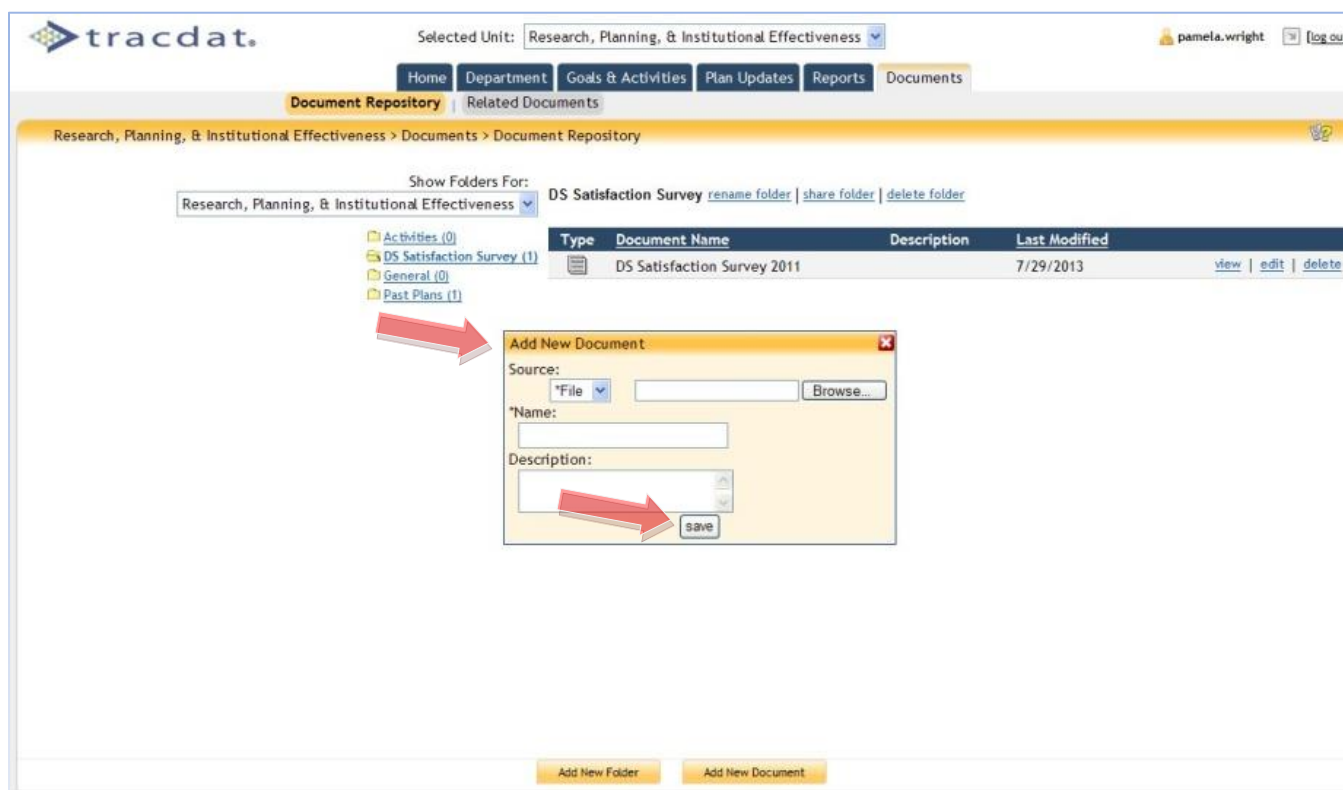
Under "Show Folders For:", a dropdown menu is set to "Research, Planning, & Institutional Effectiveness". Below this, a list of folders is shown: "Activities (0)", "DS Satisfaction Survey (1)", "General (0)", and "Past Plans (1)". A red arrow points to the "DS Satisfaction Survey (1)" folder. To the right of the folder list, there are links for "rename folder", "share folder", and "delete folder".

Below the folder list is a table of documents:

Type	Document Name	Description	Last Modified	
	DS Satisfaction Survey 2011		7/29/2013	view edit delete

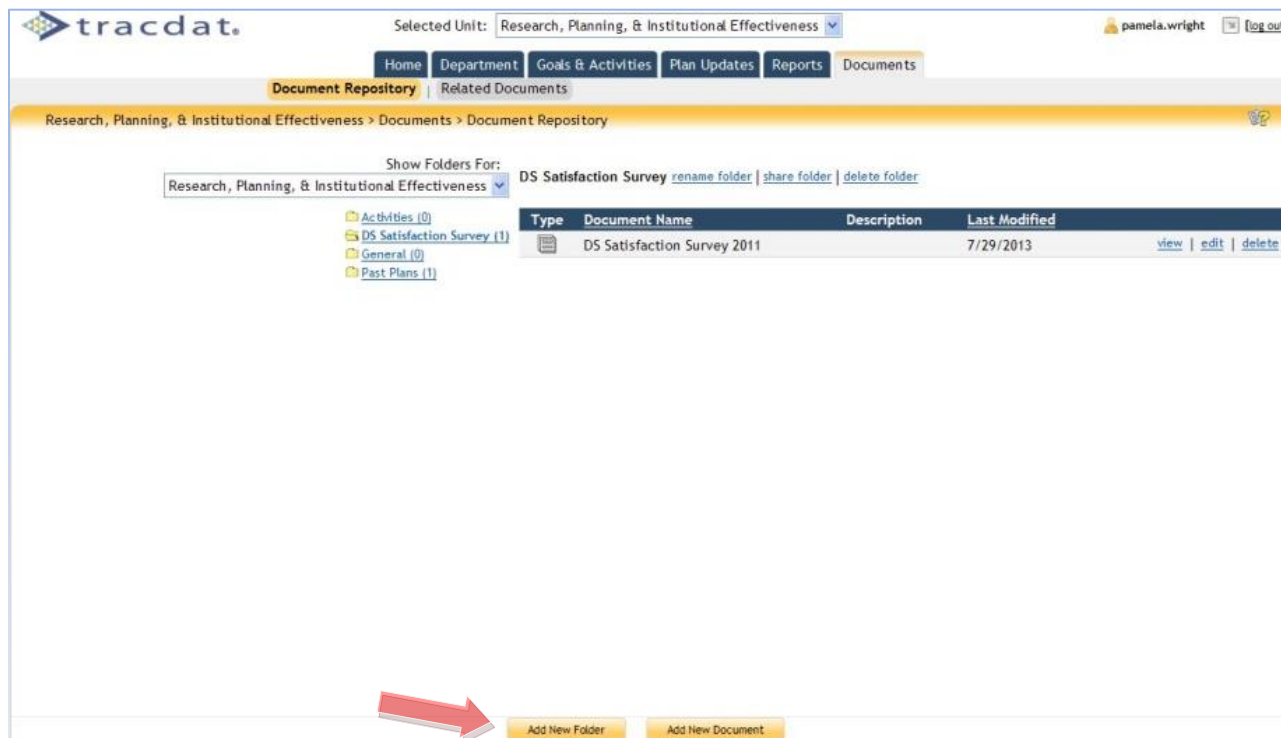
At the bottom of the page, there are two buttons: "Add New Folder" and "Add New Document". A red arrow points to the "Add New Document" button.

After clicking the “Add New Document” button, the following dialog box appears on the page. Use the drop down menu labeled “Source” to indicate whether you will be attaching a file or a URL. Enter the information to attach your document and click the “save” button.



The screenshot displays the TracDat web interface. At the top, the logo 'tracdat.' is visible on the left, and the user 'pamela.wright' is logged in on the right. The main navigation bar includes 'Home', 'Department', 'Goals & Activities', 'Plan Updates', 'Reports', and 'Documents'. The current page is 'Document Repository' for the unit 'Research, Planning, & Institutional Effectiveness'. A table lists documents, with one entry: 'DS Satisfaction Survey 2011' with a last modified date of '7/29/2013'. A dialog box titled 'Add New Document' is open in the foreground. It contains a 'Source' dropdown menu set to '*File', a text input field, and a 'Browse...' button. Below this is a '*Name:' text input field and a 'Description:' text area with a vertical scrollbar. A 'save' button is at the bottom right of the dialog. Two red arrows are overlaid on the image: one points to the 'Source' dropdown menu, and the other points to the 'save' button.

In order to add a new folder for documents, click on the “Add New Folder” button on the bottom of the page.



The “Add New Folder” dialog box will appear. Enter the name of the folder and click “save”.

