This guide will walk you through the process of entering a strategic plan into TracDat.

Log in to MyWings
Under the Staff Tab, on the right, go to the channel Institutional Effectiveness
Click on TracDat – you will not need to log on any further.
If MyWings is down for some reason, go to:
Website: https://unf.tracdat.com/tracdat/
Username: your UNF username
Password: your UNF password
If you cannot get in, contact Marianne Jaffee (mjaffee@unf.edu) or call 620-2710.

TracDat is inside the University’s firewall. Consequently you need to utilize a Virtual Private Network (VPN) connection to access it from off campus. Establishing a VPN connection is a simple process. Just go to: https://www.unf.edu/anf/its/vpn/_Home_VPN.aspx.

After logging in, you should see a dashboard page with your program listed in a drop-down menu at the very top. See example below. If there are multiple programs (assessment or planning) reporting to you, use the right arrow in the drop-down box to select the program you want to access. Units ending with (SP) are for strategic planning.
The first step in entering a plan is to enter information about your program’s unique characteristics. These characteristics include:

- **Unit Mission**: purpose or reason for the unit’s existence;
- **Unit Values**: fundamental principles that govern the unit’s policy decisions (many units have not developed values at this point but adopt the University values);
- **Unit Vision**: aspirations for a desired future, including an ideal view of the unit (many units have not drafted a vision statement).
The Academic Affairs division has agreed to adopt the Board of Governors Strategic Goals (9). These BOG Goals are broad in scope and are similar to the broad goals of our former Strategic Planning goals. Each unit’s actions are the primary substance of your unit plan. It is important to keep the number of actions to the few that are highly valued by members of the unit. The fundamental question for the members of each unit to address is, “What will we focus on during this planning period to advance both our particular unit and to contribute to the advancement of the University’s strategic plan?” To enter actions click on the “Plan” tab and the “Actions” subtab.

When entering actions, the numbering of each action is solely for your own purpose when later you need to refer to specific actions. The Action Name is simply an abbreviated title name for easier reference. Action is the detailed name you give to each action.
In TracDat, any box that has an asterisk next to the title is required. On the “Add New Action” page, “Action Name” and “Action” must be completed. The Action Name is a short two or three word title that is descriptive of the action. Enter into the Action box the full text of the action. Select the years within the planning cycle when this action will take place (use the shift key to select multiple years). In the Action Status box, select whether an action is:

- Active
- Completed
- Deferred
- Inactive

Deferring an action could be for lack of resources for that planning cycle and would indicate a specific (short) timeframe in which that action is being deferred. An action reported as “inactive” might indicate that the action is being tabled indefinitely perhaps as a result of a revised vision for that unit or changes in the university’s strategic plan.

While not required content, you may enter a “Start Date” in the designated box, but do not select an “End Date” until the action has been completed. Dates are selected by clicking on the calendar icon.

“Action Category” is a drop down with the following selections:

- Accreditation
- New Program – Undergraduate
- New Program – Graduate
- Other

This box was added as a result of these actions being repeated in many unit plans.

“Action Type” can be either “operational” or “strategic”. Operational actions are considered to be “business as usual”. These actions are activities that a unit performs as part of its ongoing efforts to achieve its mission. Strategic actions would likely have a short period in which to achieve them, are new for the unit and align with the strategic vision of the unit, college or university.

Examples include:

**Operational** – maintain faculty development to support faculty research

**Strategic** – initiate new “reach out” partnership program with nearby high schools to encourage students to consider xxx as a major area of study.
Click “Save Changes” after entering every action.

Be sure to click “Save Changes” when you have completed entry of this action.
Relating Budget Requests to Unit Actions

After you have entered and saved an action, you can move to the subtab “Budget Request” if that action will require you to request any resources for funding. The funding request below is for the action “Hire an external chair”. Budget Requests have the following information areas:

- Date added
- Description of budget request
- Budget request type (non-recurring or recurring, etc)
- Year needed and the amount

You can add two budget request entries for each action but you can continue to add budget requests at any time. For example, an action “Hire an external chair” will result in a budget request for E&G Recurring funds for the chair salary and possibly a request for non-recurring funds for computer, office supplies, etc.
After entering the budget request(s), you must assign priority to that request as well as to “Save Changes”.

Upon saving the Budget Request, you can return to that request and either EDIT the request or DELETE it.
If there are additional budget requests associated with that action, you can “Add New Budget Request” and complete another request for that same action. If you have completed the budget requests for that action, you can either return to that particular action or you can click on the “Actions” subtab and “Add New Action.”

This is the first budget request for this action. If there remains additional funding needs associated with this action, you can “Add New Budget Request.”

When done, you can either return to that specific action. Or you can return to all actions by clicking on the “Actions” subtab above and “Add a New Action.”
Relating Actions to BOG Strategic Goals and Metrics

Each unit action should be aligned or related to one or more BOG Strategic Goals and Metrics. Not all actions will related to BOG Goals however when an action, does, it is important to make that relationship. See example below.

Relate unit actions that MOST CLOSELY align to BOG Metrics and Goals. The stronger the alignment, the better our end-of-year report. This annual BOG report is our opportunity to demonstrate how UNF is addressing statewide goals and priorities and each unit’s effort will be reflected in that report.
Updating the status of your Actions through the “Results” tab

When you click on the “Results” tab, you will see a listing of every action that has been added to your unit plan. To the right of each action listed will be an option to “select” (see image further below). Selecting an action will provide you the opportunity to update the status of that action or in other words, “Add a Result” to that action.
Relating Documents to our Strategic Plan

Click on the “Documents” tab in order to upload and archive supplemental documents. Documents to upload can include new program proposals, plans to reorganize, requests for
lab fees, scholarship reports, or any documents which support any actions included in the unit’s plan.

For the example above, the unit had proposed a new BSW program. The proposal was uploaded into the Document Repository as supportive documentation. When entering the Document Repository, there is one folder already provided and titled “General”. You can “rename” that folder as the example above which was renamed “BSW Program Proposal and approval”). The (1) indicates there is one document in that folder.

Returning to the Results section again, you will note in the example below that the “Results” for Action 1.2 in the Sociology plan included the following elements:

- The Action Status was described as “Partially Met”
- The BSW program proposal document that was uploaded into the more general Document Repository is also “related” directly to this action by clicking on “Relate Document”.
When you click on Relate Document, you will have three options (see image below):

- New Document
- Document from Repository
- Previously Related Document