Step by step guide on using TracDat for strategic planning.
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Login Instructions

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

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 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!

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

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

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.
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.

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.

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.
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.

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.
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.

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.

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

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.
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.
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.
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.

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

![Image of the TracDat interface showing the Document Repository with an active Add New Folder dialog box.](image)