Evidence Document

Office of the President   Strategic Planning Committee

How to Use the Strategic Plan Dashboard

How to use the strategic plan dashboard

IN THIS SECTION ☰

End-of-year closeout

Learn how to complete the end-of-year closeout for a Strategic Planning Initiative (SPI).

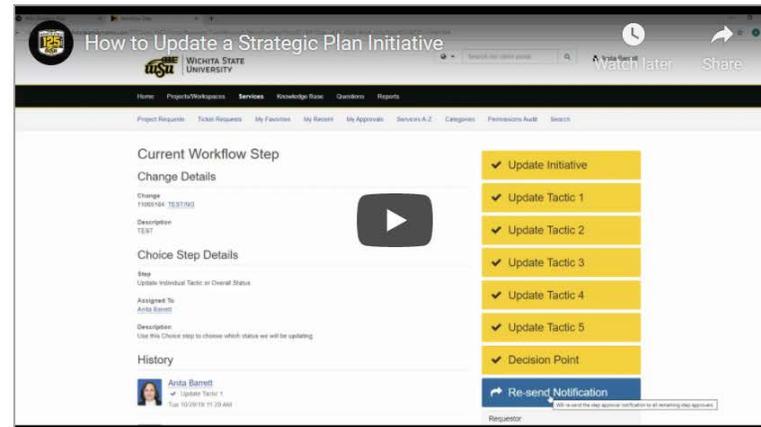**Step-by-step instructions →**

How-to videos

Creating an initiative

Watch this video tutorial to learn how to Create a Strategic Plan Initiative or view the **step-by-step instructions**.

Updating an initiative

Watch this video tutorial to learn how to Update a Strategic Plan Initiative or view the **step-by-step instructions**.

Select "Services" and type SPI in the search bar. Click the magnifying glass. In the search results, click on "Strategic Planning Initiative"

Home   Projects/Workspaces   Services   Knowledge Base   News   Questions   Reports

Search 1 Result

🌐 ▾ spi   🔍
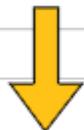
Strategic Planning Initiative
Services / College and Unit Specific Support / Strategic Planning

... will be expected to update status quarterly until completed. One page training is available. ... SPI, Initiative, Strategic, Tactics, Goals

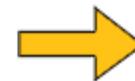After reading the directions, click on the "Submit Initiative" button.

Search the client portal

👤 Anita Barrett

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Project Requests   Ticket Requests   My Favorites   My Recent   My Approvals   Services A-Z   Categories   Permissions Audit   Search

Strategic Planning Initiative

🏷 SPI · Initiative · Strategic · Tactics · Goals

⊕ Submit Initiative

< Share

✏ Edit Service

★ Add to Favorites

Overview

This request is to be used to report any Strategic initiatives that drive WSU's Vision and Mission.

Eligibility

Wichita State University's vision is to be internationally recognized as the model for applied learning and research. Important to realizing that vision is creating an assessment system that helps to clearly tell our story, as a university, to those both on-and off-campus.

The assessment and tracking system you are about to enter provides all units within the university the opportunity to develop strategies and tactics unique to you and the work your unit is doing. Reporting progress on our strategic plan helps to ensure transparency and helps all of us make decisions moving forward. WSU's strategic plan includes goals centered on the following:

Student-centeredness

Partnerships

Research & Scholarship

Campus community & culture

Inclusive excellence

We ask that your unit develop and report on strategies and tactics so that Wichita State University can tell our university's story and how we are realizing both the vision and the mission of our university. You are asked to enter your Initiative that are associated with the aforementioned strategic planning Goals. You may or may not have strategies associated with each university goal. Tactics, which are specific measures for a strategy's Initiative, should be entered at the same time and should be specific to each Initiative. You should have at least two tactics, and no more than five tactics, to report on each initiative. Internal strategies / initiatives may also be tracked and reported at the Dean or VP's level within this

Enter information on the initiative. Make sure to include two-to-five tactics to accomplish it. Tip: The Leader should be the person who will be updating the initiative and its tactics.

WICHITA STATE UNIVERSITY

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Service Catalog / College and Unit Specific Support / Strategic Planning / Strategic Planning Initiative

Strategic Planning Initiative

➕ Show Help   ➖ Hide Help

Add Strategic Planning Initiatives with 2-5 Tactics for public reporting.

Leader * ❓ 👤

Who is the Lead for your initiative? This is the day to day leader to accomplish the work.
(Requester field with 112,000 individuals)

| Anita Barrett | ✕ ▾ | 🔍 | ✖ |

Banner Acct/Dept * ❓

The account/department under which the Initiative falls.

| Information Technology Services | ✕ ▾ | 🔍 | ✖ |

Tell us about your Initiative

Primary Mission Target ❓

Select which Mission Target your Strategic plan will address

○ Education   ○ Economic   ○ Culture

Primary Goal ❓

Select the proper Goal for your Initiative.

○ Campus Community and Culture   ○ Inclusive Excellence   ○ Partnerships   ○ Research and Scholarships   ○ Student Centeredness

Primary Strategy ❓

Select the proper Strategy

○ Applied Learning   ○ Grant Writing (research)   ○ K-12 Outreach   ○ Pre-College Outreach   ○ Research   ○ Sustainability   ○ Assessment, Incentives, etc
   ○ Interdisciplinary   ○ Recruitment   ○ Retention   ○ Academic Innovations   ○ Other

Title * ❓

Note: Be sure to gain local financial approval first and select "Yes" on the form. If you select "No," the form will be routed back to you for this important step.

The Strategic Planning Board will assign "Public" or "Not Public" to your initiative and you will receive an email. It will look like this:

TeamDynamix System Administrator
TDX #10544953 Change Comment Added (TEST - culture)   4:16 PM
Comment

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How to update initiatives

Make sure to use the system to keep your initiatives up-to-date. To do so, sign into TeamDynamix at https://wichita.teamdynamix.com using your myWSU log-in and password. Select "Services," then "My Approvals." Identify "Step Column" and click on "Update Individual Tactic or Overall Status" for your initiative.

My Approvals (5)

🔍 Search   🖨 Print

Search [   ]   Status [Pending   ▼]   ☑ Include Pending Group Assignments

ID ⇕	Item ⇕	Step ⇕	Result ⇕	Date ⇕
10179171	Enrollment (SEM) -- Comm Plan	Approval by Strategic Planning	Pending	
9853832	First Gen Coordinating Council Orientation	Select Phase	Pending	
10087670	FUSE	Approval by Strategic Planning	Pending	
10134800	Strat Comm Culture Student Life and Success Vet Affairs	Select Phase	Pending	
10544953	TEST - culture	Update Individual Tactic or Overall Status	Pending	

Page [1]

Select "Update Initiative" or a tactic by clicking on the buttons.

Home | Projects/Workspaces | Services | Knowledge Base | News | Questions | Reports

Project Requests | Ticket Requests | My Favorites | My Recent | My Approvals | Services A-Z | Categories | Permissions Audit | Search

Current Workflow Step

Change Details

Change
10544953: TEST - culture

Description
Testing Culture

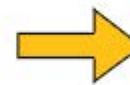## Choice Step Details

Step
Update Individual Tactic or Overall Status

Assigned To
Anita Barrett

Description
Use this Choice step to choose which status we will be updating.

History

Anita Barrett
✔ Update Tactic 3
Tue 9/3/19 6:08 PM

Anita Barrett
✔ Update Tactic 1
Tue 9/3/19 5:32 PM

➡️

✔ Update Initiative

✔ Update Tactic 1

✔ Update Tactic 2

✔ Update Tactic 3

✔ Update Tactic 4

✔ Update Tactic 5

↪ Re-send Notification

Requestor

Anita Barrett
anita.barrett@wichita.edu

Note: You may have multiple updates to accomplish. Depending on when the system cycles, you may see your updates in real time, or it may take up to five minutes to refresh after each one.

Tip: "Resend Notification" will resend you an email, and you can use the link to share with others.

Add comments that you want to go to SPI only. Note: Most people will skip the comments.

Click "Save."

Current Workflow Step
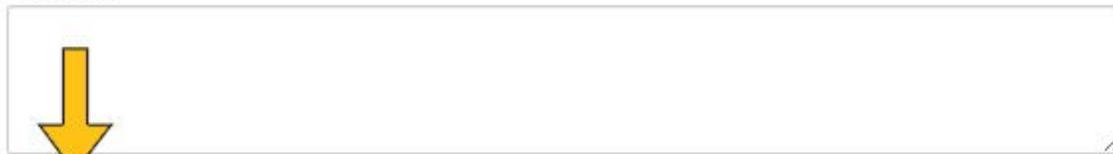
History

Anita Barrett
✔ Update Tactic 3
Tue 9/3/19 6:08 PM

Anita Barrett
✔ Update Tactic 1
Tue 9/3/19 5:32 PM

Update Tactic 1

Comments

💾 Save   Cancel

Select "Update Tactic 1" in this example.

Search the client portal 🔍

👤 Anita Barrett

Current Workflow Step

Change Details

Change
10544953: TEST - culture

Description
Testing Culture

Choice Step Details

Step
Update Tactic 1

Assigned To
Anita Barrett

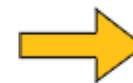**Description**
This will update the Status for Tactic 1

History

Anita Barrett
✔ Implement
Tue 9/3/19 5:33 PM

✔ Design

✔ Build

✔ Implement

✔ Complete

➔ Re-send Notification

Requestor

Anita Barrett
anita.barrett@wichita.edu

Click "Save" and you're finished.

Tip: You may go forward or backward on status. Sometimes we learn more on what will and won't work, so you can take your strategy or tactic back to an earlier status.

Strategic Planning Initiative

Strategic Planning Initiative

Title	Division	Acct/Dept	Status	Start	Due	Modified	Champion	Requestor	Mission Target	Strategic
FUSE	Academic Affairs,	Sport Management	New			Tue 9/3/19 1:32 PM		Mark Vermillion	Education	Student Centered
SEM (Strategic Enrolement Management)	Academic Affairs,	Office of Academic Affairs	In Process	Tue 8/1/17	Fri 5/29/20	Tue 9/3/19 1:28 PM	Carolyn Shaw	Carolyn Shaw	Education	Student Centered

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Additional resources

Training

Classes and open labs are scheduled periodically. To sign up, log into myWSU and select myTraining. Find classes by searching for "Strategic Planning."

Log into myWSU

Glossary

Learn more about the terms used in the strategic plan dashboard.

View the glossary

Worksheet

Use this to assist in entering initiatives into the dashboard. (1 sheet, 41KB xlsx)

Download the worksheet

Reports

View reports on the SPI dashboard.