Adding Progress Updates and Metrics in SPIMS

Selecting a Goal

Sign on to SPIMS through this link or from SPIMS Home Page

The Landing page for SPIMS is the "Goals" page. Click "Goals" on SPIMS Tool Bar if you have already logged in.
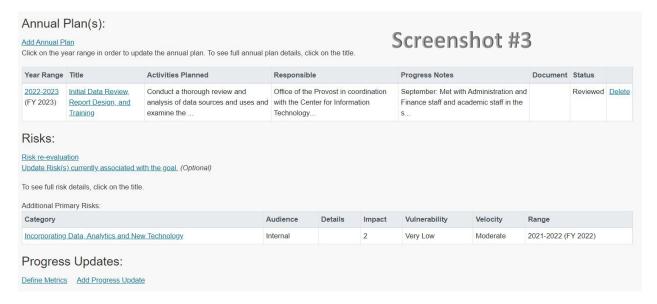
The Goals page will display only those Goals in units and subunits assigned to you. Goals that may be ready for Progress Updates and Metrics to be added will appear under the heading "Click on Goal Title to view details and update progress." (*see Screenshot #1*) Goals with risks still needing to be defined (if any) will appear in a separate table below.

Note: Goals must have at least one Annual Plan covering the fiscal year range for the Progress Update period, a status of "Reviewed," and a completed risk re-evaluation. Without the preceding, one cannot create a Progress Update. Therefore, if an Annual Plan exists but the Progress Update feature is still disabled, a risk evaluation probably needs to be performed. (*see Screenshot #2*)
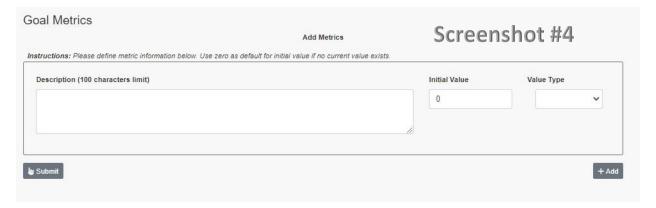

Click on Goal Title to display goal details. The selected Goal will appear in edit format, except that data previously entered will be displayed in a fixed format. Progress updates can be added when Define Metrics and Add Progress Update are available for selection at the bottom of the Goal under the Progress Updates: heading (*see Screenshot #3*)

Screenshot #3

Adding Metrics

The Unit must define at least one Metric before initiating a Progress Update. Click Define Metrics to navigate to the Goal Details & Metrics page. Scroll down to the bottom of the page (see Screenshot #4)

Screenshot #4

The entry form for Add Metrics has three (3) required components:

Description (100 characters maximum) – Brief description of Metric. Do not include a metric number, such as "1" or "#1," as SPIMS will generate a unique identifier.

Initial Value – Must be numerical and without decimals. It will be populated as 0 "Zero" by default if no value is entered. This number should be the baseline value for the Metric at the beginning of the strategic plan period (i.e., July 1, 2021).

Value Type – Choose Numeric, Percentage, or Currency from the drop-down list. Selecting Percentage will imply a leading decimal point for the Initial Value, so entering 25 will show as 25%. Currency is understood to be US Dollars without cents.
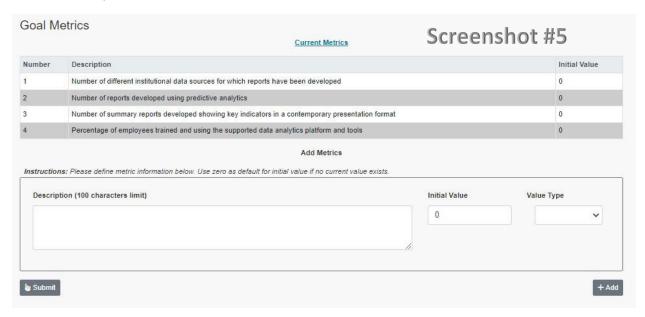
Note: SPIMS will assign a unique number for each Metric associated with a particular Goal.

If the Unit enters only one Metric, click the **Submit** button to save the entry. Otherwise, click **+Add** to add additional metrics before submitting. One can add other metrics after one or more have initially been entered by returning to the Goal Details and Metrics page.
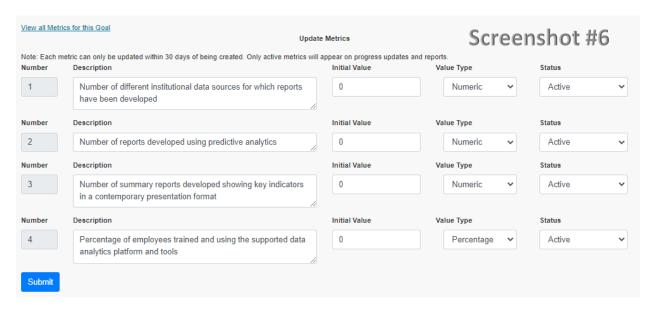
There will be the opportunity to update the values associated with each Metric during each Progress Update submission. Thus, if there are two Progress Updates during the year, the metrics will be updated twice unless their status during the Progress Update period becomes Inactive(see below).
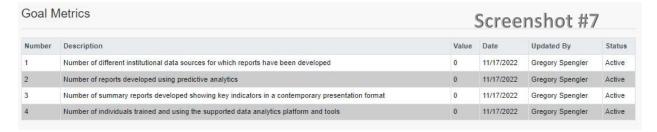
Viewing and Editing Metrics

Metrics associated with a Goal are viewable by clicking Define Metrics under **Progress Updates** on the Goal Details & Progress Update page. Here, one can see the recorded values for each Metric displayed, and the view changes to edit mode by clicking on Update Metrics (*see Screenshot #5*)

Goal Metrics   Current Metrics   Screenshot #5

Number	Description	Initial Value
1	Number of different institutional data sources for which reports have been developed	0
2	Number of reports developed using predictive analytics	0
3	Number of summary reports developed showing key indicators in a contemporary presentation format	0
4	Percentage of employees trained and using the supported data analytics platform and tools	0

Add Metrics

Instructions: Please define metric information below. Use zero as default for initial value if no current value exists.

Description (100 characters limit)	Initial Value	Value Type
	0	

Submit   +Add

Revisions to the Description, Initial Value, and Value Type of each Metric can be made on this page (*see Screenshot #6*) for up to 30 days after creating the initial Metric. Status is set to Active by default, meaning that the Metric value that will appear in the Progress Update. Changing the Status value to Inactive removes the Metric from future Progress Updates without deleting the metric entirely. The status of any metric can be switched between Active and Inactive at any time, not just within the first 30 days. Note that the numbering of metrics is not affected by changing the status of any metric.

Screenshot #6

Clicking on View all Metrics for this Goal will return the history of all updates to metrics, including the Value, Date Updated, Name of the User Entering the Update, and Current Status of Metric (Active or Inactive). (See Screenshot #7).

Screenshot #7

Creating a Progress Update

One can add Progress Updates now that metrics with baseline values exist for the Goal. Initiate a new Progress Update by selecting Add Progress Update (*see Screenshot #3*) to navigate the Progress Update page (*see Screenshot #8*). There are two approaches to creating a Progress Update:

Create a Progress Update from Scratch without including Annual Plan Content – Clicking on the Progress Update link in the header will display the Goal Details & Progress Update page where the Progress Update can be entered (*see Screenshot #9*)

Create a Progress Update by including the content of one or more existing Annual Plans. This feature enables the information of one or more Annual Plans to be displayed on the Goal Details & Progress Update page. The content from annual plans can be cut and pasted into the Progress Update as desired. SPIMS will show the annual plan content (*see Screenshot #10*) immediately above the progress update form.

Progress Update .

Provide progress update from scratch or select existing annual plan(s) below that you want to use as guide.

	Year Range	Title	Activities Planned	Responsible	Progress Notes	Status
☐	2022-2023 (FY 2023)	Initial Data Review, Report Design, and Training	Conduct a thorough review and analysis of data sources and uses and examine the ...	Office of the Provost in coordination with the Center for Information Technology...	September: Met with Administration and Finance staff and academic staff in the s...	Reviewed

Continue

Add Progress:

Complete progress update below as it relates to the 5 year goal:

Date Range for this Progress Update [▼]

Required - Only one update per date range per goal is permitted.

Status
- ⦿ Active
- ○ On Hold
- ○ Cancelled

Required

Percentage [▼]

Required

Status Explanation [   ]

Required - supporting explanation related to the status/progress (4000 character limit)

Supporting Document [Choose File] No file chosen

Optional - Word, Excel, PowerPoint, PDF, JPG or GIF only

View all Metrics for this Goal

Update Metrics

Description	Current Value	Value Type
1. Number of different institutional data sources for which reports have been developed	[ ]	Numeric ▼
2. Number of reports developed using predictive analytics	[ ]	Numeric ▼
3. Number of summary reports developed showing key indicators in a contemporary presentation format	[ ]	Numeric ▼
4. Percentage of employees trained and using the supported data analytics platform and tools	[ ]	Percentage ▼

Submit

Year Range 2022-2023 (FY 2023)

Title Initial Data Review, Report Design, and Training

Activities Planned Conduct a thorough review and analysis of data sources and uses and examine the format, content, and distribution of existing reports in finance and resource, student recruitment and success, facilities and building maintenance, and philanthropy areas. Evaluate, plan, and begin the implementation of new data analysis and reporting systems, including supporting the training of appropriate staff.

Responsible Office of the Provost in coordination with the Center for Information Technology Services

Progress Notes September: Met with Administration and Finance staff and academic staff in the schools of Social Work, Dentistry, and Carey Law. October: Met with Philanthropy staff and schools of Medicine, Pharmacy, Nursing, and the Graduate School

Document

Status Reviewed

Progress Update Components

Date Range for This Progress Update – Select the date range the Progress Update relates to from the drop-down menu. A Unit can submit only one Progress Update for each date range. Progress Updates will likely occur twice a year, with each report covering six months. However, the first Progress Update will cover July 1, 2021, through December 31, 2022, for eighteen (18) months.

Status – At this time, all Goals in the Progress Updates should indicate an "Active" status. Do not choose 'On Hold' or 'Cancelled' until IESPA provides supplemental guidance.

Percentage – Select the completion percentage as it relates to the five-year Goal's overall status, not the completion of the activity or activities described in the annual plan or plans. As with the previous UMB Five Year Strategic Plan, this completion percentage is self-reported by the individual school/unit. ***Required***

Status Explanation (4000 characters maximum) – Use this space to provide a narrative generally supporting the completion percentage and documentation of specific achievements accomplished during the reporting period. As stated, one can copy content from any Annual Plan selected for viewing in the previous step. ***Required***

Supporting Document - Attach a file of the following type only: Word, Excel, PowerPoint, PDF, JPG, or GIF – ***Optional***

Update Metrics – Provide the value of each metric as of the end of the reporting period. Only Active metrics are displayed here. To reactivate a metric previously set to Inactive status, follow the instructions under Viewing and Editing Metrics above. SPIMS will not allow the Descriptions and Value Types of metrics to be revised here. Still, one can alter within 30 days after initially creating on the Goal Details & Metrics page.

Submitting a Progress Update

Once completed, the Progress Update will show on the screen before submitting (*see Screenshot #11*). After submitting, a summary of the Progress Update will appear at the bottom of the Goal Details & Progress Update page (*see Screenshot #12*). The summary will indicate the user's name submitting the Progress Update and the date submitted. Unlike Goals and Annual Plans, there is no review or approval process for Progress Updates. Note that an Administrator or Contributor role can submit a Progress Update for the school/unit or department associated with the strategic Goal. However, once a Progress Report is submitted, only IESPA can delete it.

Clicking on the following components in the Goal view results in the following actions:

Date Range – Opens the Progress Update in edit mode. Revisions made are saved by clicking the Submit button. The Unit can edit the Progress Report during the submission period IESPA establishes, after which IESPA will lock SPIMS for editing.

Status – Opens the Progress Update in report/print mode (*see Screenshot #13*)

Document – Clicking on Download will open the file saved to the Progress Update. There can only be one document attached to each Progress Report. Still, it can be overwritten with a new record at any time during submission through edit mode.

Add Progress:

Complete progress update below as it relates to the 5 year goal:

Screenshot #11

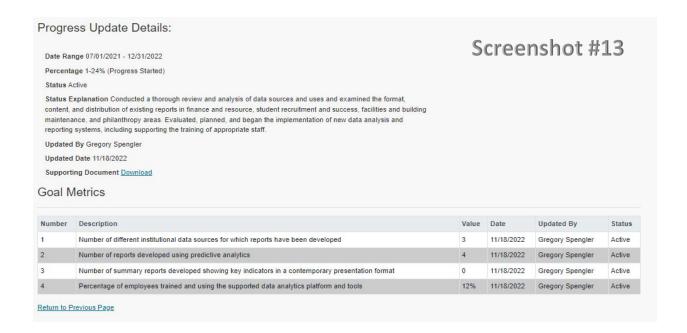|	
Date Range for this Progress Update	07/01/2021 - 12/31/2022
	Required - Only one update per date range per goal is permitted.
Status	⦿ Active ○ On Hold ○ Cancelled
	Required
Percentage	1-24% (Progress Started)
	Required
Status Explanation	Conducted a thorough review and analysis of data sources and uses and examined the format, content, and distribution of existing reports in finance and resource, student recruitment and success, facilities and building maintenance, and philanthropy areas. Evaluated, planned, and began the implementation of new data analysis and reporting systems, including supporting the training of appropriate staff.
	Required - supporting explanation related to the status/progress (4000 character limit)
Supporting Document	Choose File Goal 30 First Progress Report Additional Documentation.docx
	Optional - Word, Excel, PowerPoint, PDF, JPG or GIF only

View all Metrics for this Goal

Update Metrics

Description	Current Value	Value Type
1. Number of different institutional data sources for which reports have been developed	3	Numeric
2. Number of reports developed using predictive analytics	4	Numeric
3. Number of summary reports developed showing key indicators in a contemporary presentation format	0	Numeric
4. Percentage of employees trained and using the supported data analytics platform and tools	12	Percentage

Submit

Progress Updates:

Screenshot #12

Define Metrics   Add Progress Update

Click on the date in order to update the progress. To see full progress details, click on the status.

Date Range	Percentage	Status	Status Explanation	Updated By	Updated Date	Document
07/01/2021 - 12/31/2022	1-24% (Progress Started)	Active	Conducted a thorough review and analysis of data sources and uses and examined t...	Gregory Spengler	11/18/2022	Download

Screenshot #13

Progress Update Details:

Date Range 07/01/2021 - 12/31/2022

Percentage 1-24% (Progress Started)

Status Active

Status Explanation Conducted a thorough review and analysis of data sources and uses and examined the format, content, and distribution of existing reports in finance and resource, student recruitment and success, facilities and building maintenance, and philanthropy areas. Evaluated, planned, and began the implementation of new data analysis and reporting systems, including supporting the training of appropriate staff.

Updated By Gregory Spengler

Updated Date 11/18/2022

Supporting Document Download

Goal Metrics

Number	Description	Value	Date	Updated By	Status
1	Number of different institutional data sources for which reports have been developed	3	11/18/2022	Gregory Spengler	Active
2	Number of reports developed using predictive analytics	4	11/18/2022	Gregory Spengler	Active
3	Number of summary reports developed showing key indicators in a contemporary presentation format	0	11/18/2022	Gregory Spengler	Active
4	Percentage of employees trained and using the supported data analytics platform and tools	12%	11/18/2022	Gregory Spengler	Active

Return to Previous Page

Viewing Metrics History

In addition to baseline values, the Unit updates metric values during each Progress Update submission. Follow these steps to view the history of the values for all metrics associated with a Goal:

1. From the SPIMS main menu, click on the desired Goal Title in the Goal summary list
2. Scroll down to Progress Updates and select Define Metrics
3. Click on Current Metrics
4. Click on View all Metrics for this Goal. SPIMS will generate a table at the bottom of the page with all values previously entered for metrics, including baseline values. SPIMS will sort the values are sorted by date of entry (*see Screenshot #14*)

Screenshot #14

Goal Metrics

Number	Description	Value	Date	Updated By	Status
1	Number of different institutional data sources for which reports have been developed	0	11/18/2022	Gregory Spengler	Active
2	Number of reports developed using predictive analytics	0	11/18/2022	Gregory Spengler	Active
3	Number of summary reports developed showing key indicators in a contemporary presentation format	0	11/18/2022	Gregory Spengler	Active
4	Percentage of employees trained and using the supported data analytics platform and tools	0%	11/18/2022	Gregory Spengler	Active
1	Number of different institutional data sources for which reports have been developed	3	11/18/2022	Gregory Spengler	Active
2	Number of reports developed using predictive analytics	4	11/18/2022	Gregory Spengler	Active
3	Number of summary reports developed showing key indicators in a contemporary presentation format	0	11/18/2022	Gregory Spengler	Active
4	Percentage of employees trained and using the supported data analytics platform and tools	12%	11/18/2022	Gregory Spengler	Active

SPIMS Guidance – Adding Progress Updates and Metrics
Version 1.3 - November 28, 2022