

# 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.

### Goals

Click on Goal Title to view details and update progress. Use the search to find others. System admins can modify approved goals by clicking on the status.

### Screenshot #1

Show 100 entries

Search:

Number	Goal Title	Theme	School/Area	Department	Status	Reviewed?
15	<a href="#">Identify and Implement Institutional Learning Outc</a>	Student Growth and Success	Office of the Provost	All Units	<a href="#">Approved</a>	Y

**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*)

### Annual Plan(s):

[Add Annual Plan](#)

Click on the year range in order to update the annual plan. To see full annual plan details, click on the title.

Year Range	Title	Activities Planned	Responsible	Progress Notes	Document	Status	
2022-2023 (FY 2023)	<a href="#">Initial Data Review Report Design and Training</a>	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...			Reviewed	<a href="#">Delete</a>

### Risks:

[Risk re-evaluation](#)

[Update Risk\(s\) currently associated with the goal. \(Optional\)](#)

There are currently no additional risks for this goal.

### Screenshot #2

### Progress Updates:

An annual plan and risk re-evaluation must be defined for each goal for the upcoming fiscal year.

The ability to provide updates on goals is disabled if an annual plan and risk re-evaluation are not defined after July 1st.

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*)

## Annual Plan(s):

[Add Annual Plan](#)

Click on the year range in order to update the annual plan. To see full annual plan details, click on the title.

## Screenshot #3

Year Range	Title	Activities Planned	Responsible	Progress Notes	Document	Status	
<a href="#">2022-2023</a> (FY 2023)	<a href="#">Initial Data Review, Report Design, and Training</a>	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	<a href="#">Delete</a>

## Risks:

[Risk re-evaluation](#)

[Update Risk\(s\) currently associated with the goal.](#) (Optional)

To see full risk details, click on the title.

Additional Primary Risks:

Category	Audience	Details	Impact	Vulnerability	Velocity	Range
<a href="#">Incorporating Data, Analytics and New Technology</a>	Internal		2	Very Low	Moderate	2021-2022 (FY 2022)

## Progress Updates:

[Define Metrics](#) [Add Progress Update](#)

## 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)

## Goal Metrics

Add Metrics

## Screenshot #4

*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
<input type="text"/>	<input type="text" value="0"/>	<input type="text" value=""/>

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*)

The screenshot shows the 'Goal Metrics' interface. At the top right, it is labeled 'Screenshot #5'. Below the title, there is a link for 'Current Metrics'. A table displays four metrics with their descriptions and initial values. Below the table is an 'Add Metrics' section with instructions and a form to define a new metric. The form includes a text area for the description, a numeric input for the initial value, and a dropdown for the value type. At the bottom of the form are 'Submit' and '+ Add' buttons.

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

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.

[View all Metrics for this Goal](#)

Update Metrics

## Screenshot #6

Note: Each metric can only be updated within 30 days of being created. Only active metrics will appear on progress updates and reports.

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

[Submit](#)

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).

Goal Metrics

## Screenshot #7

Number	Description	Value	Date	Updated By	Status
1	Number of different institutional data sources for which reports have been developed	0	11/17/2022	Gregory Spengler	Active
2	Number of reports developed using predictive analytics	0	11/17/2022	Gregory Spengler	Active
3	Number of summary reports developed showing key indicators in a contemporary presentation format	0	11/17/2022	Gregory Spengler	Active
4	Number of individuals trained and using the supported data analytics platform and tools	0	11/17/2022	Gregory Spengler	Active

## 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

## Screenshot #8

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
<input type="checkbox"/> 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:

## Screenshot #9

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

1. Number of different institutional data sources for which reports have been developed

Current Value

Value Type

Numeric

Description

2. Number of reports developed using predictive analytics

Current Value

Value Type

Numeric

Description

3. Number of summary reports developed showing key indicators in a contemporary presentation format

Current Value

Value Type

Numeric

Description

4. Percentage of employees trained and using the supported data analytics platform and tools

Current Value

Value Type

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

## Screenshot #10

## 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.

Note: As of the reporting period ending June 30, 2024, there are additional actions required when 100% Completion is selected to determine if ongoing reporting is needed or can end with the current reporting period. When 100% Completion is selected the question “*Will the attained goal maintain 100% completion within the remaining strategic plan period and there are no factors that could cause it to fall below 100%?*” must be answered by selecting one of the following radio buttons:

- Yes, the goal is completed (*see Screenshot #11*)
- No, this goal may change to less than 100% in the future (*see screenshot #12*).

Selecting the “Yes” option displays three questions to answer that will provide information needed to appropriately document the completed goal’s benefit to UMB and the intended stakeholders (500 characters maximum each response) **Required:**

1. *How has completing the strategic plan goal impacted UMB’s ability to achieve the theme’s objective? Provide at least one tangible benefit resulting from this goal’s completion.*
2. *In what ways did the value received from completing the strategic plan goal benefit the intended stakeholders?*
3. *Could the metrics for this goal change for the remaining strategic plan period?*

Selecting the “No” option displays the question “*What factor(s) is the unit concerned about that may impact the goal’s future results?*” (500 characters maximum). **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**

## Progress Update - Completion Confirmation

## Screenshot #11

You have marked the goal as 100% (Completed):

Will the attained goal maintain the 100% completion within the remaining strategic plan period and there are no factors that could cause it to fall below 100%?

- Yes, this goal is completed  
 No, this goal may change to less than 100% in the future

Required

How has completing the strategic plan goal impacted UMB's ability to achieve the theme's objective? Provide at least one tangible benefit resulting from this goal's completion. (Your response may be used in future publications.)

Required (500 character limit)

In what ways did the value received from completing the strategic plan goal benefit the intended stakeholders?

Required (500 character limit)

Could the metrics for this goal change for the remaining strategic plan period? (see [Metrics table](#)) If so, how?

Required (500 character limit)

Submit

## Progress Update - Completion Confirmation

## Screenshot #12

You have marked the goal as 100% (Completed):

Will the attained goal maintain the 100% completion within the remaining strategic plan period and there are no factors that could cause it to fall below 100%?

- Yes, this goal is completed  
 No, this goal may change to less than 100% in the future

Required

What factor(s) is the unit concerned about that may impact this goal's future results?

New employees hired will need to be trained to use the supported data analytics platform and tools. Unless this is done, the percentage of employees trained will fall below 100%.

Required (500 character limit)

Submit

**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 #13*). After submitting, a summary of the Progress Update will appear at the bottom of the Goal Details & Progress Update page (see *Screenshot #14*). 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.

## Add Progress:

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

## Screenshot #13

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   
 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
<input type="text" value="1. Number of different institutional data sources for which reports have been developed"/>	<input type="text" value="3"/>	<input type="text" value="Numeric"/>
<input type="text" value="2. Number of reports developed using predictive analytics"/>	<input type="text" value="4"/>	<input type="text" value="Numeric"/>
<input type="text" value="3. Number of summary reports developed showing key indicators in a contemporary presentation format"/>	<input type="text" value="0"/>	<input type="text" value="Numeric"/>
<input type="text" value="4. Percentage of employees trained and using the supported data analytics platform and tools"/>	<input type="text" value="12"/>	<input type="text" value="Percentage"/>

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 #15*)

**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.

## Progress Updates:

[Define Metrics](#) [Add Progress Update](#)

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

## Screenshot #14

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

Progress Update Details:

## Screenshot #15

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

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## 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 #16*)

Goal Metrics Screenshot #16

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