

PITT plan – quarterly update instructions

- 1) Log into PITT plan. If you need a reminder on how to do that, see “PITT plan – login & initiative acceptance instructions” on the Access Pitt State website: <https://www.pittstate.edu/president/access-pitt-state.html>.
- 2) From the homepage/dashboard, click on My Workspace in the upper right.

The screenshot shows the PITT plan dashboard interface. At the top right, there is a dropdown menu labeled 'My Workspace' with a downward arrow. A large yellow arrow points to this menu. The dashboard includes several sections: 'Strategic Snapshot' with 4 Total Goals, 110 Total Initiatives, 0 Completed Initiatives, and 0.59% Overall Strategic Plan Progress; 'Participation Snapshot' for Jul 2025 - Jun 2026 showing 94 Total Entities, 94 Participating Entities, and 204 Total Entities Users, with a donut chart for 153 Total users (45 Responsible, 108 Collaborator); 'Initiative Status Overview' for Jul 2025 - Jun 2026 with a donut chart showing 23 Not Started, 87 In Progress, 0 On Hold, 0 At Risk, 0 Completed, and 0 Discontinued; and 'Unique Active Users' showing 49, 96, and 106 for Single Year, Multi Year, and Review Period respectively.

- 3) This Assigned page will list any initiatives you have been connected to as either responsible for or collaborating on.

Note: the quarterly progress updates should be done by the person listed as responsible for the initiative, but collaborators can make comments too if desired.

Click anywhere on the box for the initiative you'd like to update, and you will be taken into the initiative window.

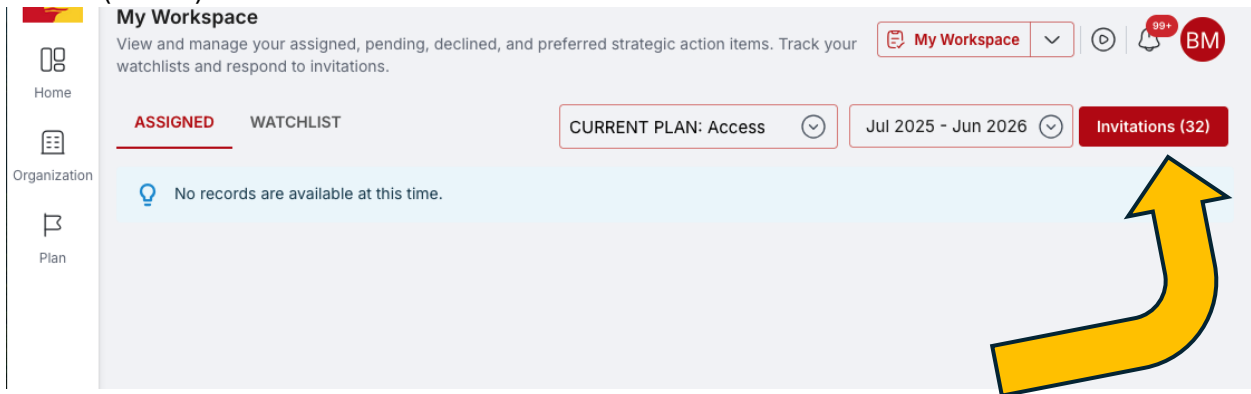
You can also quickly review the goal this initiative is tied to, progress made and any comments by hovering over the icons on the left for that initiative.

The screenshot shows a web browser window at pittstate.visionsync.com/dashboard/strategic-action-items. The page is titled "My Workspace" and contains a navigation sidebar on the left with icons for Home, Organization, Plan, User, Report, and Settings. The main content area is divided into two tabs: "ASSIGNED" (selected) and "WATCHLIST". Above the list are filters for "CURRENT PLAN: Access", "Jul 2025 - Jun 2026", and "Invitations (0)". Two initiatives are listed:

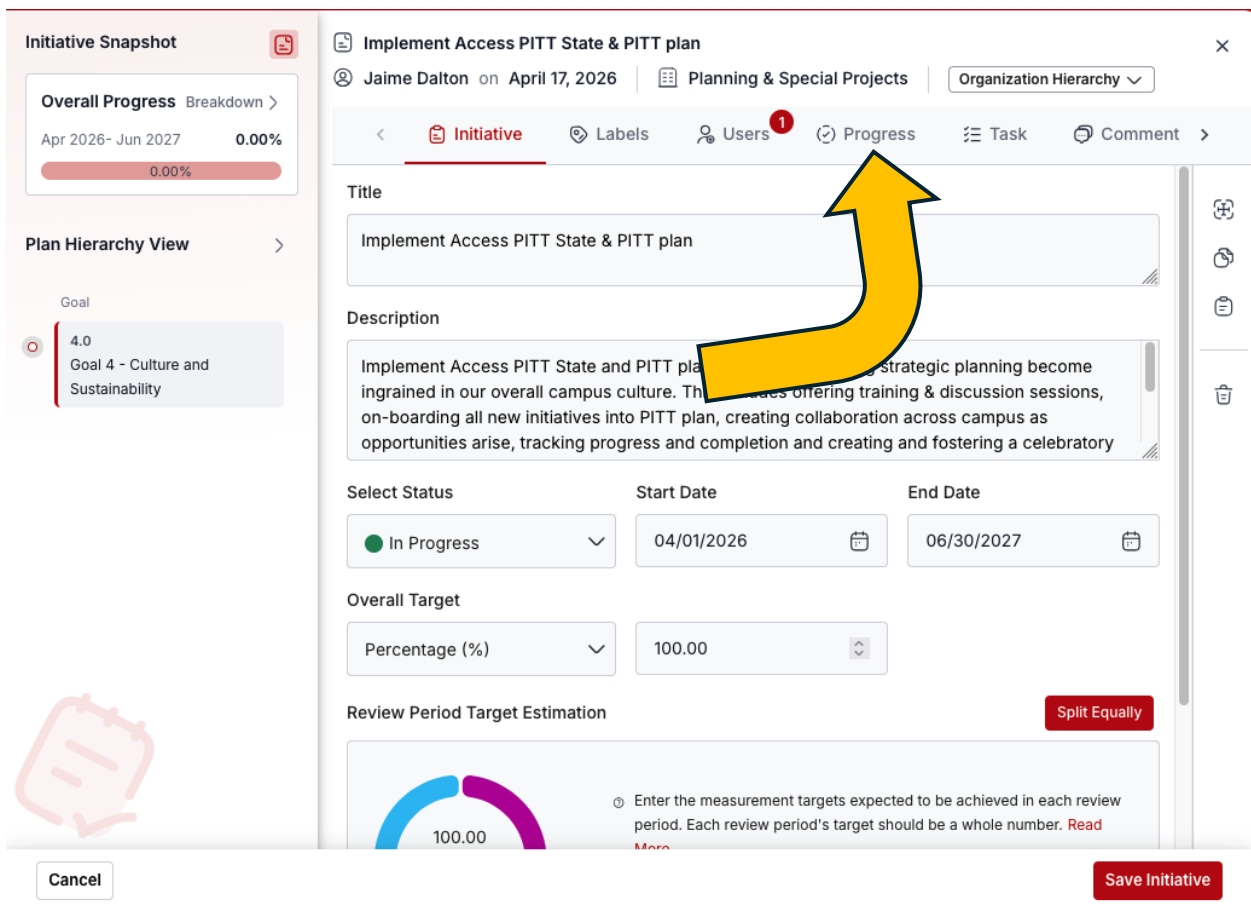
- Big ideas**: Planning & Special Projects, Date Started: Apr 01, 2026, Role: Responsible, Status: Not Started. It has a progress indicator at 0% and a comment icon.
- Implement Access PITT State & PITT plan**: Planning & Special Projects, Date Started: Apr 01, 2026, Role: Responsible, Status: In Progress. It has a progress indicator at 0% and a comment icon. A yellow arrow points to the progress indicator, and another yellow arrow points to the comment icon.

Note: If you do not see your initiative(s) listed here, you may not have accepted the invitation to be part of the initiative yet. Click on the red Invitations button on the upper right (image below). This will open a window that shows you the initiative(s) you've been invited to participate in and allow you to Accept or Decline right there.

Once you have accepted, the initiative(s) will then show on your Assigned list (above).



4) The initiative window will show you all information about the initiative. To enter quarterly progress, click on the Progress tab.



- 5) On this screen, click on the plus sign in the action column for the quarter you would like to update.

The screenshot displays a project management interface. On the left, there is a sidebar with 'Initiative Snapshot' and 'Plan Hierarchy View'. The main area shows a 'Track Progress' table with columns for Period, Progress, Sentiment, Comments, and Action. A yellow arrow points to a plus sign in the Action column for the 'Apr 2026 - Jun 2026' period.

Initiative Snapshot

Overall Progress Breakdown >

Apr 2026- Jun 2027 0.00%

0.00%

Plan Hierarchy View >

Goal

4.0

Goal 4 - Culture and Sustainability

Implement Access PITT State & PITT plan

Jaime Dalton on April 17, 2026 | Planning & Special Projects | Organization Hierarchy

Initiative Labels Users ¹ Progress Task Comment

Track Progress

Period	Progress	Sentiment	Comments	Action
Jul 2025 - Jun 2026 0% out of 30% target achieved				
Apr 2026 - Jun 2026	-	-	-	+
Jul 2026 - Jun 2027 0% out of 70% target achieved				

Cancel

- 6) In the window that pops up, you can update the Overall Initiative Status if needed, then enter your Overall Progress Update percentage, select a Progress Sentiment and then type your comments in the Add Your Comments box. Remember to hit the red Save Progress button at the bottom when you are done.

The screenshot displays a 'Track Progress For Review Period' modal window overlaid on a dashboard. The dashboard background shows an 'Initiative Snapshot' for 'Implement Access PITT State & PITT plan' with an overall progress of 0.00% for the period Apr 2026 - Jun 2027. The modal window contains the following elements:

- Overall Initiative Status:** A dropdown menu currently set to 'In Progress'.
- Overall Progress Update:** A text input field containing 'Enter Here' followed by a percentage sign (%).
- Overall Progress:** A progress bar showing '0% of 100%'.
- Progress Sentiment:** A dropdown menu currently set to 'Select status'.
- Add Your Comments:** A text area for entering comments.
- Buttons:** 'Back' and 'Save Progress' (highlighted in red) buttons at the bottom.

Yellow arrows point to the 'Overall Initiative Status' dropdown, the 'Overall Progress Update' input field, the 'Progress Sentiment' dropdown, and the 'Save Progress' button.

Once you hit Save Progress, the window will refresh and the green “Progress stored successfully” message will appear and your information will now be filled in.

You can make edits to that information at any point, just click on the pencil icon in the Action column.

The screenshot shows a web interface for tracking progress. On the left, there is an 'Initiative Snapshot' section with an 'Overall Progress' bar at 30.00% for the period 'Apr 2026 - Jun 2027'. Below it is a 'Plan Hierarchy View' showing a goal of 4.0 for 'Goal 4 - Culture and Sustainability'. The main area is titled 'Implement Access PITT State & PITT plan' and shows a 'Track Progress' table. A green notification banner at the top right says 'Progress stored successfully.' Two yellow arrows point to the notification and the pencil icon in the 'Action' column of the table.

Period	Progress	Sentiment	Comments	Action
Jul 2025 - Jun 2026	30% out of 30% target achieved			
Apr 2026 - Jun 2026	30%	On Track	FY26 Q4 - Nearly 100% primary initiatives have been submitted...	
Jul 2026 - Jun 2027	0% out of 70% target achieved			

That's it – you're done until the next quarter!

If you have any questions or feedback, email Jaime Dalton (jdalton@pittstate.edu).