

Instruction Manual: Degree Program Academic Assessment Plan



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Introduction

This manual will guide you through using TracDat. The manual uses the following

- Green boxes to give you notes on the screens you will see when viewing TracDat
- White boxes to give you specific steps for entering information into the system
- Arrows to guide you from the steps and notes to their position on the TracDat pages

The manual follows the order of tabs you can click on in TracDat's home page. These tabs include

- Home
- Assessment Unit
- Plan
- Results
- Reports
- Documents

Chapter 1: Home



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Login

Follow the steps below to login to the TracDat system.



Figure 1.1: Login Page for TracDat

Steps for Figure 1.1:

1. Go to <http://tracdat.unt.edu:8081/tracdat/> The picture to the left will appear on your screen.
2. Type your EUID into the Username box.
3. Type meangreen into the Password box.
4. Hit enter.

Know Your Home Page

After you login your page will look as follows:

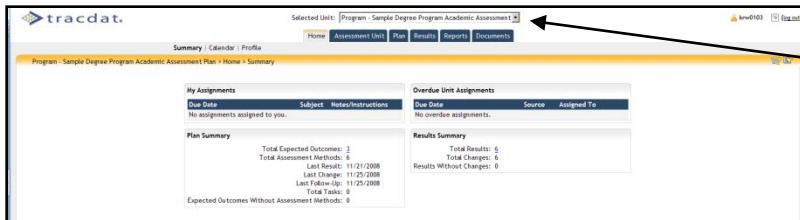


Figure 1.2: Program Home Page

Notes on Figure 1.2:

Click on the section labeled Selected Unit to select the appropriate academic degree program from the drop-down list.

The page will open on the Summary page. You can click Calendar or Profile to change the page.

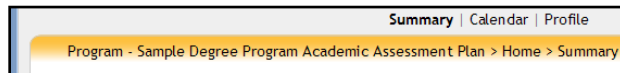


Figure 1.3: Program Home Page

Notes on Figure 1.3:

- Click Summary to get back to the home page.
- Click Calendar to add information to your calendar.
- Click Profile to change your password and personal information.

The Summary

The Summary Page shows updates to the program and the current status of your assignments.

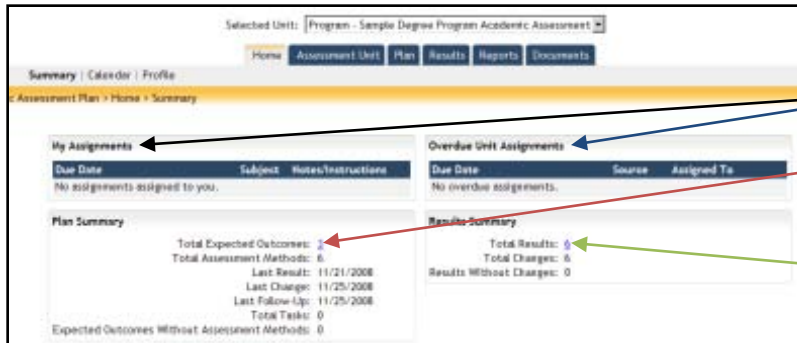


Figure 1.4: Program Summary (Home) page

Notes on Figure 1.4:

Use the Summary Page to

- Check your Due Dates and Overdue Assignments.
- Get an overview of Student Learning Outcomes. (Click on the number to see the Outcome.)
- See the results of the assessments. (Click on the number to see the results.)

The Calendar

Click on Calendar if you need to add important dates to your page. You can add a date to your calendar in two ways:

Calendar Option 1:

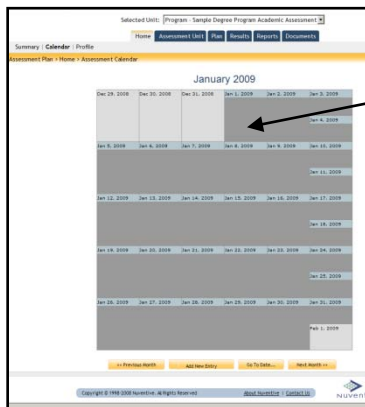


Figure 1.5: Click Date on Calendar

Steps for Figures 1.5 and 1.6:

1. Click a date on the calendar.
2. Add information to that date. You must fill in the Summary box and Begin and End Dates.
3. Click Save Changes.

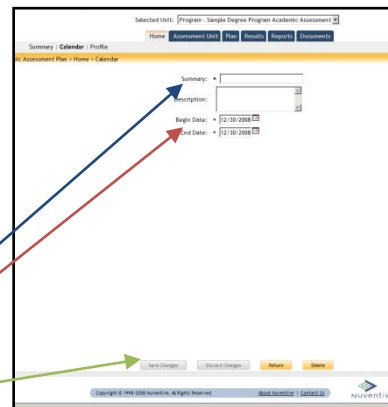


Figure 1.6: Fill in Calendar Information

Calendar Option 2:

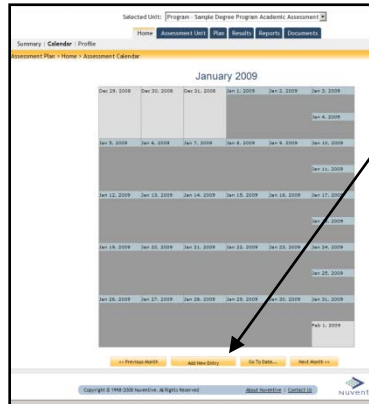


Figure 1.7: Add New Entry Option

- Steps for Figures 1.7 and 1.8:**
1. Click Add New Entry.
 2. Add information to that date. You must fill in the Summary box and Begin and End Dates.
 3. Click Save Changes.

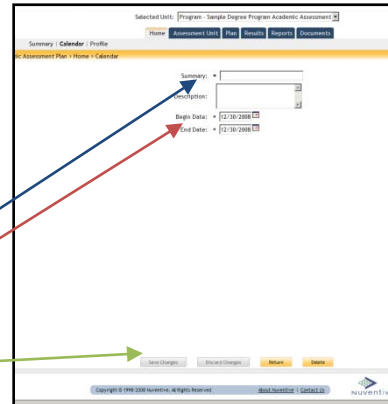


Figure 1.8: Fill in Calendar Information

The Profile

The Profile Page allows you to change your name, email, and password information. Click on Profile (see Figure 1.3 on page 3) to bring up the page below.



Figure 1.9: Fill in Profile Information

- Notes on Figure 1.9:**
- You must have your First Name, Last Name, and Email filled in to change your password.
 - When you have filled in those three requirements, click Save Changes.
 - After you click Save Changes, Change Password will highlight in orange and you can click it to change your password.

Chapter 2: Assessment Unit



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Starting the Assessment Unit

“The Assessment Unit is the primary Unit where assessment takes place. An Assessment Unit is that Unit which has a plan and is being used to document the results/status of that plan. This form allows you to collect general information about the Assessment Unit” (tracdat.unt.edu). In the Assessment Unit section, you can edit the mission and vision statement of the Degree Program Academic Assessment and view personnel responsible for that section.

Overview: General Section

The General Section is where you can edit the mission and vision statements.

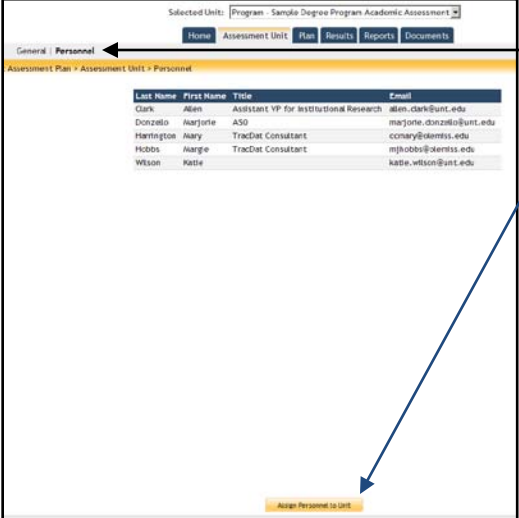
Steps for Figure 2.1:

1. Click on General to see the mission and vision statements.
2. Type in your mission statement.
3. Click the Spellcheck button.
4. Click Save Changes to save your work.
 - a. Note you can also Discard Changes if you want to delete all your work.
5. Repeat the above steps to insert a vision statement.

Figure 2.1: Fill in mission and vision statements in the General Section of the Assessment Unit

Overview: Personnel Section

The Personnel Section allows you to see people currently assigned to the Assessment Unit and to add people to work on the unit.



The screenshot shows a web interface with a navigation menu at the top: Home, Assessment Unit, Plan, Results, Reports, Documents. Below the menu, there's a breadcrumb trail: Assessment Plan > Assessment Unit > Personnel. A table lists assigned personnel:

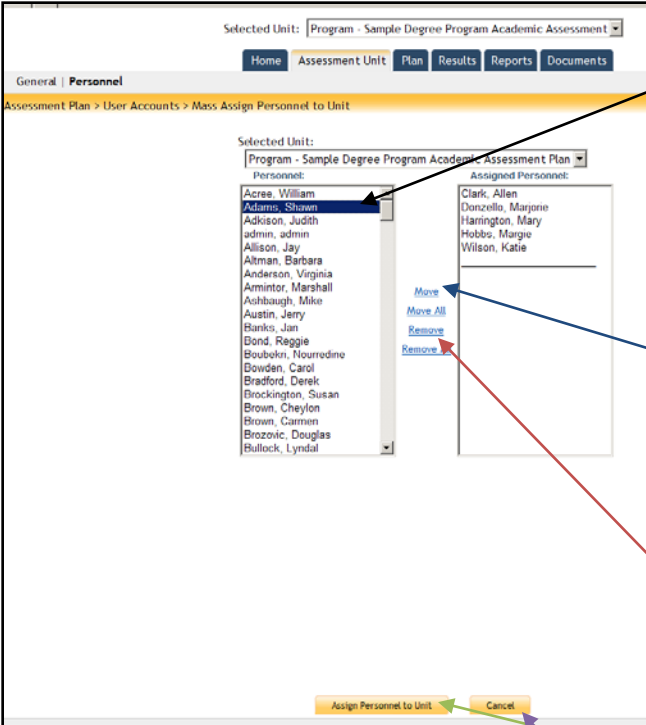
Last Name	First Name	Title	Email
Clark	Allen	Assistant VP for Institutional Research	allen.clark@unt.edu
Donzello	Marjorie	ASO	marjorie.donzello@unt.edu
Harrington	Mary	TracDat Consultant	cmharry@olemiss.edu
Hobbs	Marge	TracDat Consultant	mjhobbs@olemiss.edu
Wilson	Katie		katie.wilson@unt.edu

At the bottom of the page, there is a yellow button labeled 'Assign Personnel to Unit'.

Steps for Figure 2.2:

1. Click on Personnel to view people assigned to the Assessment Unit.
2. Click Assign Personnel to Unit.

Figure 2.2: View Personnel Assigned to the Assessment Unit



The screenshot shows the 'Mass Assign Personnel to Unit' interface. It features two columns of names:

- Personnel:** A scrollable list of names including Acree, William; Adams, Shawn; Adkison, Judith; admin, admin; Allison, Jay; Altman, Barbara; Anderson, Virginia; Armintor, Marshall; Aubbaugh, Mike; Austin, Jerry; Banks, Jan; Bond, Reggie; Bouboeki, Nourredine; Bowden, Carol; Bradford, Derek; Brockington, Susan; Brown, Cheylyon; Brown, Carmen; Brozovic, Douglas; Bullock, Lyndal.
- Assigned Personnel:** A list of names already assigned: Clark, Allen; Donzello, Marjorie; Harrington, Mary; Hobbs, Marge; Wilson, Katie.

Between the columns are buttons: Move, Move All, Remove, and Remove All. At the bottom, there are buttons for 'Assign Personnel to Unit' and 'Cancel'.

Steps for Figure 2.3:

1. Click on the names in the Personnel Box to select who you want to assign to the unit.
 - a. You can highlight more than one name by pressing down Control on your keyboard and clicking on the names you want.
 - b. If you do not see the personnel you want, please send an email to marjorie.donzello@unt.edu with the names of the individuals to add.
2. Click Move to move the names to the Assigned Personnel box.
 - a. Selecting Move All will move every name in the Personnel box to the right whether you clicked on names or not. Only click Move All if you want to move every name in the Personnel box to the Assigned Personnel box.
3. If you want to remove names from Assigned Personnel, click on the name and click Remove.
 - a. Selecting Remove All will remove every name from the Assigned Personnel Box.
4. Click Assign Personnel to Unit to finish and have emails sent to those people.
 - a. TracDat automatically sends emails to personnel to let them know they have been assigned to the unit.
5. If you want to discard any changes you made, click Cancel.

Figure 2.3: Move Personnel

Chapter 3: Plan

Starting the Plan

The Plan Section is where you will add Student Learning Outcomes, Means of Assessment, and Related Goals.

Overview: Student Learning Outcomes

“[Student Learning] Outcomes are a key element in the assessment planning process as defined in TracDat Enterprise. It is against each [Student Learning] Outcome that you will be able to define the means of assessing the [Student Learning] Outcome and recording the results of that assessment” (tracdat.unt.edu).

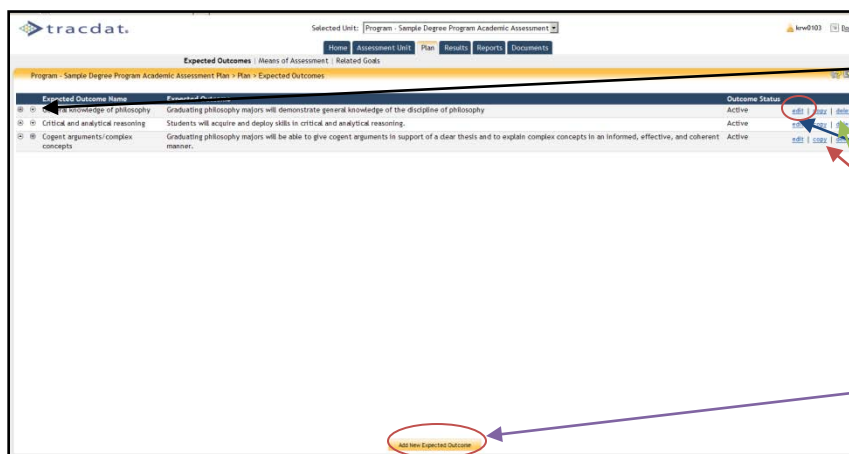


Figure 3.1: The Plan Page

Notes on Figure 3.1:

- Click the arrows to alter which Student Learning Outcome is on top.
- Click Edit to make changes to that Student Learning Outcome.
- Click Copy to copy the Student Learning Outcome to an assessment plan.
- Click Delete to remove the Student Learning Outcome.
- Click Add New Student Learning Outcome to insert a Student Learning Outcome in this section.

Creating New Student Learning Outcomes and Editing Student Learning Outcomes

Click Add New Student Learning Outcome or click Edit (see circled images on Figure 3.1) to change a Student Learning Outcome and follow the steps below.

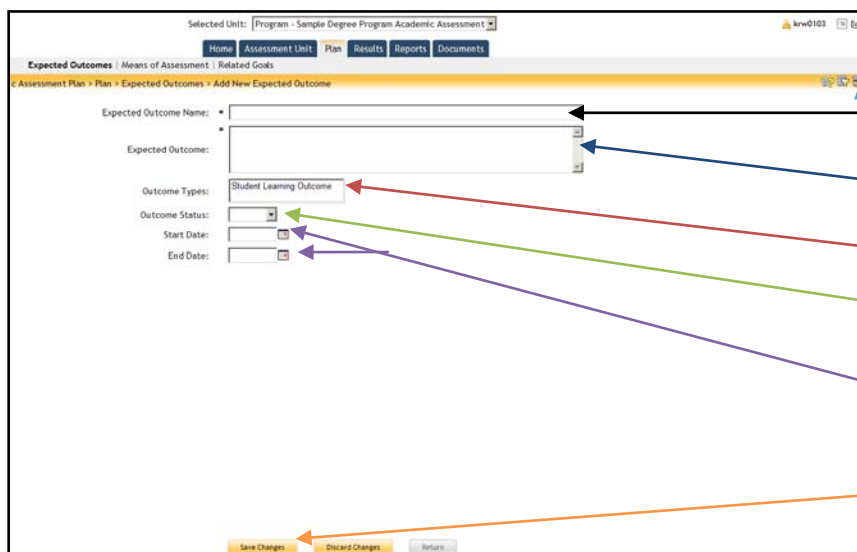


Figure 3.2: Creating Student Learning Outcomes

Steps for Figure 3.2:

You must fill in the boxes marked with an asterisk.

1. Type in a name for the Student Learning Outcome.
2. Type in a description of the Student Learning Outcome.
3. Skip Outcome Type. You cannot change the Outcome Type.
4. Click the arrow and select Active or Inactive for the Outcome Status.
5. Click the Calendar symbol to add a Start and End Date.
6. Click the Spellcheck button.
7. Click Save Changes.
 - a. Click Discard Changes if you do not want to save your work.

Copying a Student Learning Outcome

Click on Copy (see circled image on Figure 3.3) to copy a Student Learning Outcome to a different section and then follow the steps below.

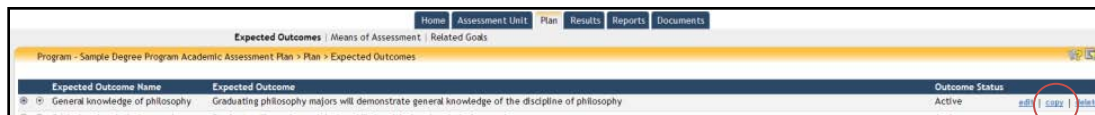
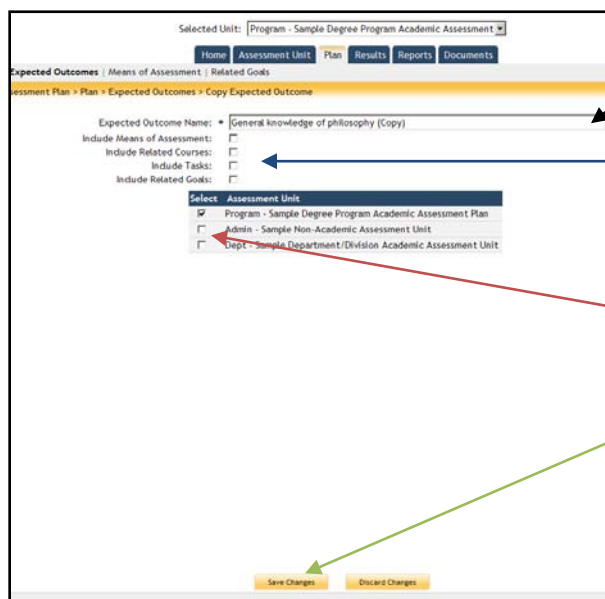


Figure 3.3:
Click Copy



Steps for Figure 3.4:

1. Ensure the correct outcome is in the Student Learning Outcome Name box.
2. Click on any extra items that you want to copy. If you do not select any extra items, only the Student Learning Outcome will get copied.
3. Select the assessment plan where you want the Student Learning Outcome to go.
4. Click Save Changes.
 - a. Click Discard Changes if you do not want to copy the Student Learning Outcome.

Figure 3.4: Copy Student Learning Outcomes

Notes:

Never Delete A Student Learning Outcome That Has Assessed Data Associated With It. Deleting an outcome will delete all of the historic data associated with that outcome. If you are starting to draft an outcome, and decide before proceeding with the data collection that it is not appropriate, you may delete it, but that would be the only exception.

Additionally, do not edit an outcome that has assessment data associated with it. This will invalidate all of the assessment results that have been collected to date. Instead, do the following

1. Close that outcome out
2. Change status to “Closed” or “Inactive”
3. Create a new outcome with the revisions that you are making

Overview: Means of Assessment

Click on Means of Assessment (see image circled in red on Figure 3.5) to view and edit Assessment Methods for Expected Outcomes.

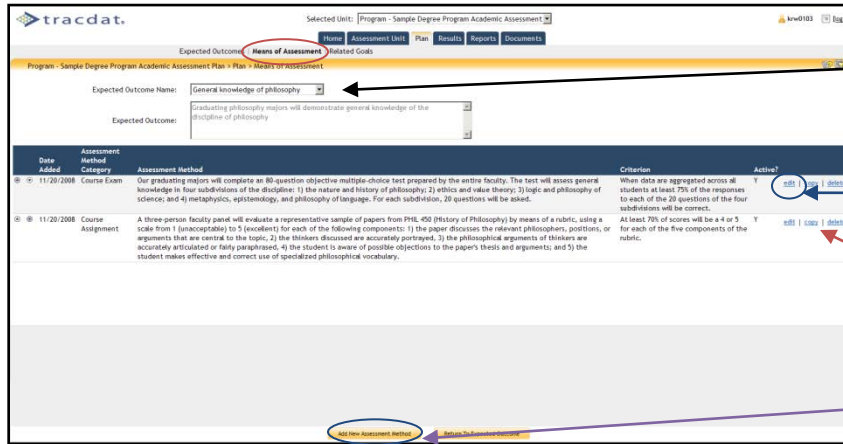


Figure 3.5: Means of Assessment Page

Notes on Figure 3.5:

- Click the arrow in the Student Learning Outcome Name box to change the Outcome's methods you are viewing.
- Click Edit to make changes to that Assessment Method.
- Click Copy to copy the Assessment Method to another Outcome.
- Click Delete to remove the Assessment Method.
- Click Add New Assessment Method to insert an Assessment in this section.

Creating New Assessment Methods and Editing Assessment Methods

Click Add New Assessment Method or Edit (see images circled in blue on Figure 3.5 above) to change an Assessment Method and then follow the steps below.

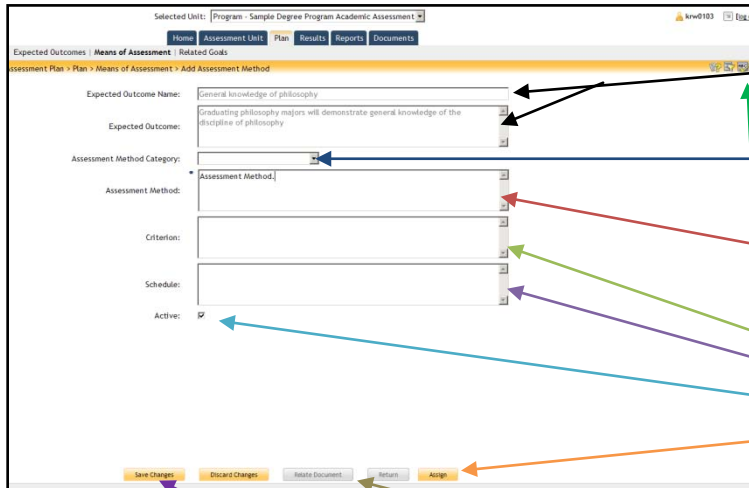


Figure 3.6: Create and Edit Assessment Methods

Steps for Figure 3.6:

1. Ensure the correct outcome is in the Student Learning Outcome Name box and Student Learning Outcome box.
2. Click the drop-down arrow and click on your selection in the Assessment Category Method box.
3. Type in the Assessment Method. You must have an Assessment Method to save your changes.
4. Type in the criteria for the method.
5. Type in the schedule for the method.
6. Ensure the Active box is checked.
7. Assign the Assessment Method to personnel working on the project.
 - a. For instructions on assigning assessments see Figure 3.7, page 16).
8. Select a document you want attached to the assessment. (See Page 16, Figure 3.8 through 3.11)
 - a. You can only add a document if you are editing an assessment.
9. Spellcheck the assessment.
10. Save changes.

- Steps for Figure 3.7:**
 When you assign an Assessment Method, Figure 3.7 appears. To assign the assessment
1. Select what you need personnel to provide.
 2. Tell the TracDat system what assessments need to go in the folder.
 3. Select who will do the assessment.
 4. Select a Due Date.
 5. Select how often you want the personnel to do the assignment.
 6. Type in any other notes or instructions.
 7. Check the box if you want the email sent to you also.
 8. Click save.

Figure 3.7: Assign Assessment Methods

Figure 3.8: Relate Document Options

- Steps for Figure 3.8 through 3.11:**
 When you relate a document, you will be given three options
- New Document
 - To enter a new document do the following
 1. Select File or URL.
 2. Select Browse to get the document or type in the web address.
 3. Fill in Name and Description.
 4. Select a Repository Folder.
 5. Click Relate Document.
 - Document from Repository
 - To select a document from the Repository
 1. Select the Data Analysis or General Folder.
 2. Click Relate next to the document you want to relate.
 - Previously Related Document
 - To select a Previously Related Document
 1. Click Relate next to the document you want to select.

Figure 3.9: Add a New Document Method

Type	Document Name	Description	Date Related
	Table for PHIL 490 Spring 2008.xls	Results of Faculty Panel scores of respondents to videotaped presentations	

Figure 3.10: Assign Document from Repository

Type	Document Name	Description	Date Related
	IR Website 2008	Survey in Survey Monkey	11/12/2008

Figure 3.11: Assign Previously Related Document

Overview: Related Goals

Select Related Goals to view and select institutional goals for Student Learning Outcomes.

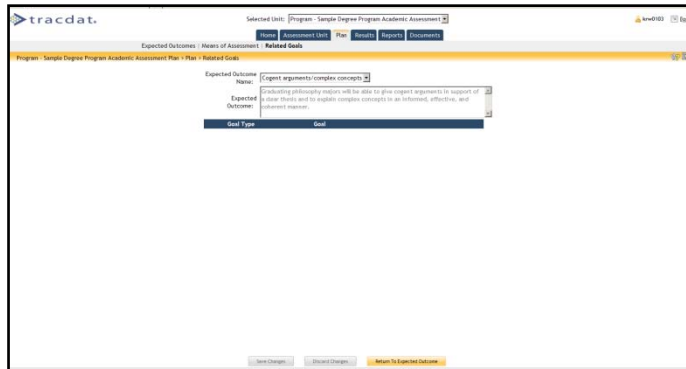


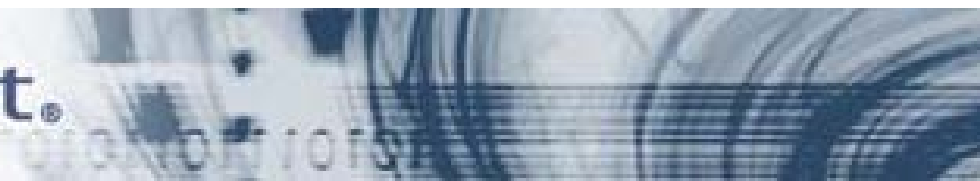
Figure 3.12: Related Goals Page

Notes on Figure 3.12:
Only TracDat administrators can add or edit institutional goals.

Chapter 4: Results



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Filling in Results

In the Results section, you can view, add, and edit results and changes that happened from the results.

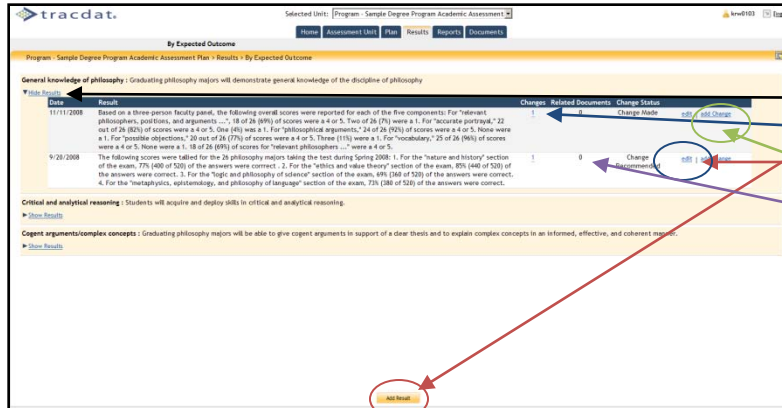


Figure 4.1: Results Page

Notes on Figure 4.1:
In the results section, you can

- Show/Hide results
- View changes
- Edit and add results
- Add changes
- View Related Documents

Add Results

Click Add Result to add new results to the Student Learning Outcomes (see the image circled in red on Figure 4.1).

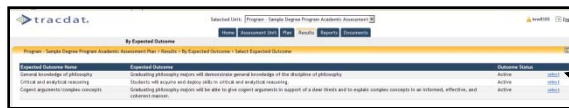


Figure 4.2: Select Student Learning Outcome for Results

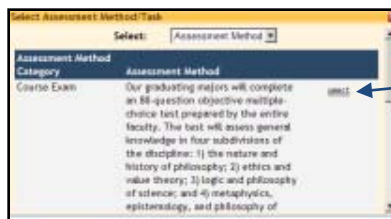


Figure 4.3: Select Assessment Method/Task

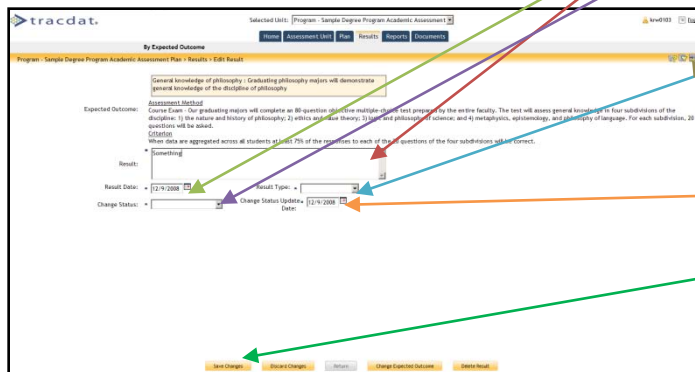


Figure 4.4: Add Result

Steps for Figures 4.2 through 4.4:
You must fill in sections that have an asterisk next to them.

1. Click Select from the Student Learning Outcome you want to add a result to.
2. Click Select from the Assessment Method you want to add a result to.
3. Type in the Result.
4. Select a Result Date.
5. Select the Status of the Result. Your options are
 - a. Change Made
 - b. Change Recommended
 - c. No Change Required
6. Select the Result Type. Your options are
 - a. Criterion Met
 - b. Criterion Not Met
 - c. Inconclusive
7. Select the Change Status Update Date.
8. Spellcheck the results.
9. Save changes.

Edit Results and Changes

To edit Results and Changes, click edit (see image circled in blue on page 21, Figure 4.1).

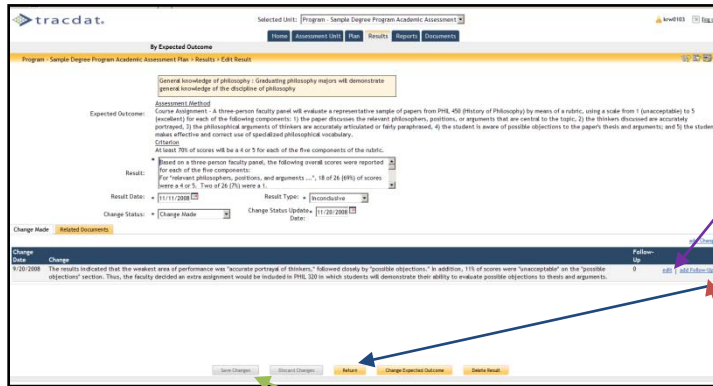


Figure 4.5: Edit Results

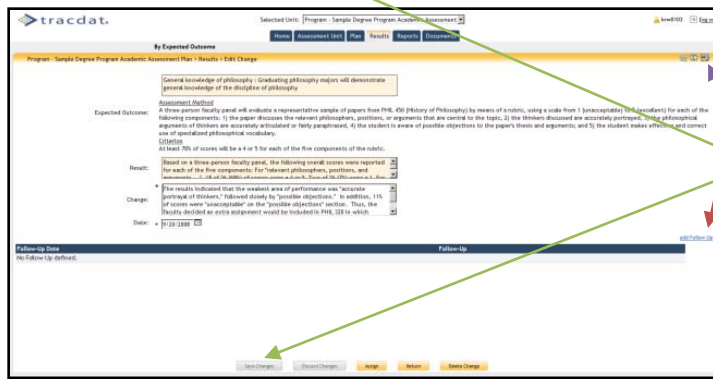


Figure 4.6: Edit Changes

Notes on Figures 4.5 and 4.6:

- In the Edit Section, you can make edits to any section marked with an asterisk.
- If you want to edit a Change, click edit. You can edit any box marked with an asterisk.
- If you want to assign a Change to personnel, you can click Assign on the Edit Change page. (See page 16, Figure 3.7 for more information.)
- If you want to add a follow-up, you can click follow-up on the Edit Change or Edit Result page. You can edit the boxes marked with an asterisk.
- Each time you finish making changes, click Spellcheck and Save Changes.

Add Changes

To add changes, click on Add Change on the main Results page (see the image circled in green on page 21, Figure 4.1).

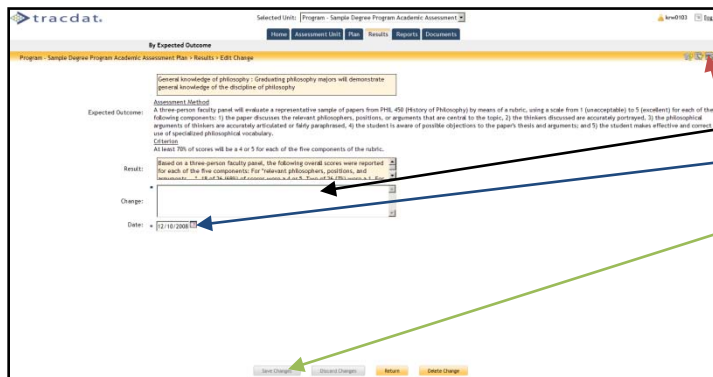


Figure 4.7: Edit Changes

Steps for Figure 4.7:

- You must fill in the sections with an asterisk.
1. Add the change.
 2. Select the date the change occurred.
 3. Click Spellcheck.
 4. Save changes.

Chapter 5: Reports

Viewing Reports

To view reports for Assessment Units and Courses, select run (see circled image on Figure 5.1) next to the report you want to view. Once you have selected run the Figure 5.2 will appear.

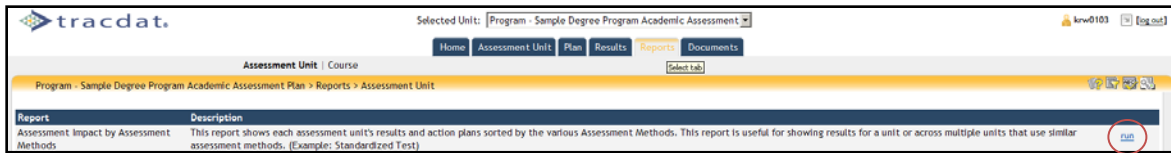


Figure 5.1: Run Report

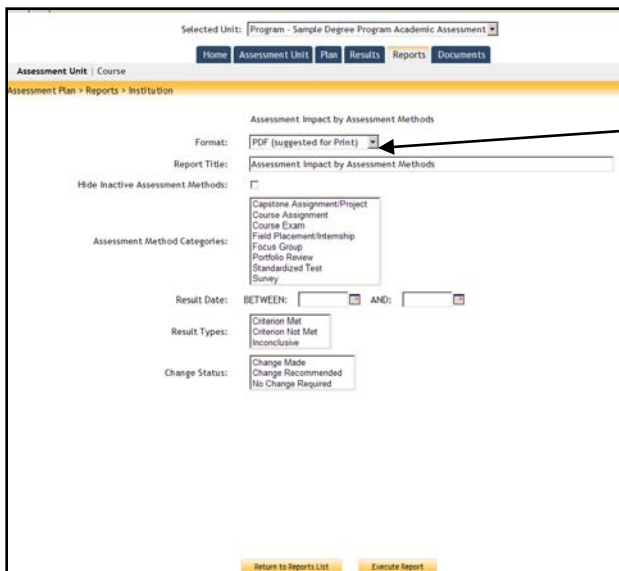


Figure 5.2: Execute Report

Steps for Figure 5.2:

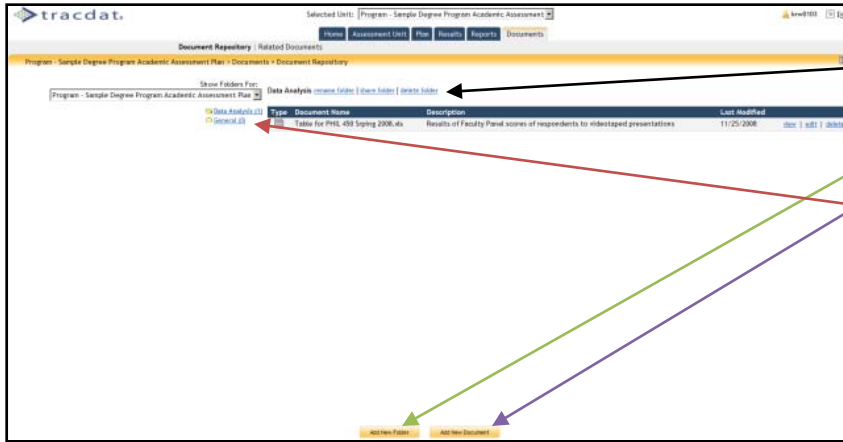
Steps 2-6 are optional. The arrows point to only the required steps.

1. Select the format you want to view the report in. Your options are
 - a. PDF
 - b. HTML
2. Check whether you want to hide Inactive Assessment Methods.
3. Select what Assessment Method Categories you want to appear.
 - a. Hold down Control on your keyboard and click the categories if you want more than one to appear.
4. Select a Result Date.
5. Select Result Types.
 - a. Hold down Control on your keyboard and click the types if you want more than one to appear.
6. Select a Change Status.
 - a. Hold down Control on your keyboard and click the status if you want more than one to appear.
7. Click Execute Report.

Chapter 6: Documents

Viewing the Document Repository

In the Documents section, you can view, edit, and add documents.

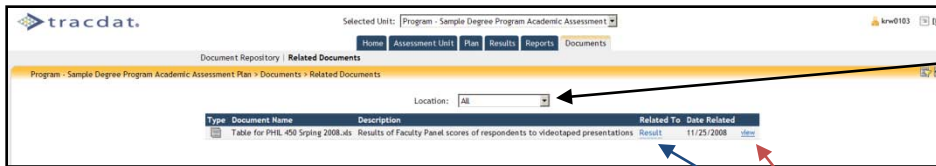


- Notes on Figure 6.1:**
- Change the name, share, or delete the folder.
 - View, edit, or delete the document.
 - Add a new folder.
 - Add a new document.
 - Click the folder you want to store the document in before you upload the document.

Figure 6.1: View Documents in Repository

Viewing the Related Documents

In this section, you can view all documents that relate to a Course, Means of Assessment, or Result.



- Notes on Figure 6.2:**
- Click the drop-down arrow to select what Related Documents you want to view. Your options are
 - Course
 - Means of Assessment
 - Result
 - Click Result to view what result the document relates to.
 - Click View to see the document.

Figure 6.2: View Related Documents

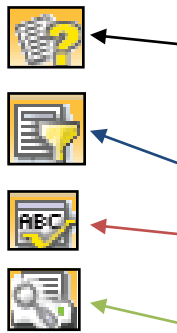
Appendix: Buttons



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Buttons Used in TracDat

The following buttons can be found throughout TracDat to help you with certain sections.



Notes:

- **Help.** Click this button if you need definitions or extra help uploading information.
- **Filter.** Use this button to filter information.
- **Spellchecker.** Use this to spellcheck the information you add.
- **Search.** Use this button to search for information.

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