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Assessment Overview

*TracDat allows University personnel to make informed decisions related to programs, budget, services, and facilities.*

Stephen F. Austin State University must be able to measure the effectiveness of educational programs and services. An institution must collect accurate, usable data that addresses regional, state, disciplinary, and institutional effectiveness measures.

Every faculty member, staff member, and administrator at SFA has a role in developing, implementing, and sustaining assessment plans. From the departmental or unit perspective, faculty and staff set annual goals that contribute to SFA Strategic Plan Goals and then individuals use assessment results for program and service improvement. Further, assessment is not an endpoint, but rather a cyclic activity that provides data for decision making. The time frame for assessment varies by goal. Not every assessment activity is carried out each year; however, some activities may occur more than once per year.

SFA collects effectiveness data using the TracDat assessment management system. TracDat is a data management tool designed to meet assessment and planning needs and to overcome common assessment obstacles. TracDat allows for institution-wide viewing of assessment plans and uniform reporting of assessment data across departments. SFA utilizes the TracDat tool in order to document institutional effectiveness processes, including Strategic Planning and assessment. SFA uses TracDat results to improve all aspects of the University and to make informed decisions regarding programs, budgets, services, and facilities in support of the University Strategic Plan.
**Interface Overview**

*In this chapter, access a brief snapshot of the TracDat interface features most likely to be used when entering SFA assessment plans and result data.*

The Interface Overview presents the major **Tabs** and **Sub-Tabs** in TracDat and their basic functions as they relate to the assessment process. Screen shots are provided to illustrate what a user may see as he navigates the TracDat environment. The reader should keep in mind that individual users are granted tailored access, and as such, the tabs available will vary according to the permissions provided for each user. Additionally, since not all users will perform tasks that necessitate accessing each and every tab, individuals may find that they only need in-depth understanding of a limited number of tabs in TracDat.
INTRODUCTION

Access

To access TracDat, visit the following web site:

http://tracdat.sfasu.edu:8081/tracdat/

(or access the TracDat link from the SFA Institutional Research web site:
Access SFA Home Page, Click the Administration Link, Click the Institutional Research Link,
Click the Assessment Link Click the TracDat Link, Click Access TracDat System)

- Returning users: Enter your TracDat username and password.
- First-time users: Contact the SFA Office of Institutional Research at (936)468-3806 or sfa_ir@sfasu.edu to request access to the TracDat.

TIP

Each user is provided tailored access, and the tabs available will vary according to the permissions granted by the TracDat administrator. Not all users will see all six tabs described here.

After logging into TracDat, users will notice that the current configuration of TracDat includes up to six tabs:

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

In the following sections, each tab is briefly illustrated. Screenshots of possible scenarios and a brief description of the tabs’ contents are provided. Subsequent chapters in this document give more detailed instructions on the use of each tab.

Tab 1: Home

The Home Tab may contain 3 Sub-Tabs:

- Summary
  - View personal assignments
  - View overdue unit assignments
  - View brief description of Assessment Unit objectives, assessment methods, and results
INTRODUCTION

Tab 1: Home - Continued

- Calendar
  - View monthly summary of unit assignments
  - Create/View reminder entries for assessment purposes

To Add a New Entry to Assessment Unit Calendar:

- Select Home Tab
- Select Calendar Sub-Tab
- Select Add New Entry
- Enter a Summary, Description, and Begin/End Dates
- Select Save Changes button
Tab 1: Home - Continued

- Profile
  - Add/Change user email address
  - Change TracDat password

To Add or Change a User Email Address:
- Select Home Tab
- Select Profile Sub-Tab
- Enter or Change Email Address
- Select Save Changes button

To Change a TracDat Password:
- Select Home Tab
- Select Profile Sub-Tab
- Select Change Password button
- Enter Current and New Passwords
- Select Save Changes button
Tab 2: Assessment Unit

The Assessment Unit Tab will feature 2 Sub-Tabs:

- General:
  - View/Modify Assessment Unit mission statement
- Personnel
  - View/Add/Remove personnel associated with Assessment Unit
INTRODUCTION

Tab 3: Plan

The Plan Tab will feature 3 Sub-Tabs:

- Objectives
  - View/Add/Modify Objectives for an Assessment Unit
- Means of Assessment
  - View/Add means of assessment for Objectives
- Related Goals
  - View/Add objective relationships to higher level goals

To Add/Modify an Objective:

- Select Plan Tab
- Select Objectives Sub-Tab
- Select Add New Objective or Select “edit,” “copy,” “delete” next to a current objective
- Make changes
- Select Save Changes button after editing
Tab 3: Plan - Continued

To Add/Modify a Means of Assessment:

- Select Plan Tab
- Select Means of Assessment Sub-Tab
- Select Add New Assessment Method or select “edit,” “copy,” or “delete” next to a current Assessment Method
- Make changes
- Select Save Changes button after editing
To Assign an Assessment Method to a User:

- Select Assign
- Select the type of information to provide
- Select where to submit the documents
- Select the person to whom the task is assigned
- Select the Due Date
- Select the Frequency of Assignment
- Enter text for email in Notes field
- Check email assignment to assignee
- Save

The employee assigned an assessment method will receive an email with a link to TracDat.
To Relate Goals to an Objective:

- Select Plan Tab
- Select Related Goals Sub-Tab
- Select the desired Objective Name from the drop down menu
- Check the box next to each goal that relates to the Objective (Select/deselect all by toggling the topmost check box of each section-next to the name of the Summary Group Unit)
- Select Save Changes button
**INTRODUCTION**

**Tab 4: Results**

The Results tab organizes result data by Assessment Unit Objectives. Then Action Plans and Related Documents can be linked to saved Results.

To add a new Result to an Objective:

- Select Results Tab
- Select Add Result button
- Select the Objective to which the Result is linked
- Select the Assessment Method to which the Result is linked
- Enter Results and required fields
- Select Save Changes button after editing
- An Action Plan with Follow-Up is developed to correct deficiencies.
INTRODUCTION

Tab 5: Reports

Reports can be executed in either HTML or PDF. For best results, use HTML for viewing and PDF for printing reports.

- Report data is related to the Assessment Unit that is selected from the top drop-down menu.
- Recommended reports:
  - Assessment Plan
  - Assessment Report
  - Unit Assessment Report-Four Column.

Click here access the Reports Tab
Tab 6: Documents

Supporting documents should be stored in the Document Repository found under the Documents Tab. The Documents tab provides an area to:

- View/Add/Edit/Share folders within the Assessment Unit
- Upload files to be related to Assessment Plans and Results
- Deposit general assessment documents
- View where current documents are related to means of assessment and results
The Assessment Plan

TracDat will efficiently accommodate information collected in the assessment planning process.

Assessment documents and data from planning cycles can and should be entered into the TracDat system. Once initial data entry is performed, the process becomes simpler, more secure, and will be more effective in influencing decision making. This chapter will address initial entry of the unit’s assessment plan. Once this step has been accomplished and a quality plan is in place, it will not need revision except in extenuating circumstances.
Unit Mission in TracDat

Non-academic TracDat coordinators with administrative TracDat permissions will begin the process of entering the assessment plan by entering or verifying the Assessment Unit’s mission in TracDat on the Assessment Unit tab. (Academic programs and core curriculum assessment units are not required to submit mission information.)

- Click on the Assessment Unit Tab.
- Click in the Mission field.
- Enter (or verify the existing) Unit’s mission.
- Click Save Changes.

TIP

This document refers to the “Assessment Unit” which represents all administrative departments, academic units, core curriculum entries, and academic programs.

TIP

TracDat users who do not have administrative TracDat privileges will not see the Assessment Unit Tab in TracDat.
Unit Personnel in TracDat

TracDat users can utilize the Personnel Sub-Tab to monitor personnel associated with the Assessment Unit.

- Click on the Assessment Unit Tab.
- Click on the Personnel Sub-Tab.
- Click the Assign Personnel to Unit button to add Personnel.
- On the ensuing screen, choose Personnel and move them to the unit.
- Click the Assign Personnel to Unit button.

The example below illustrates the scenario where many personnel are associated with the example Assessment Unit. Most actual units will only have a few individuals associated.

Note that most TracDat users will not use this feature. TracDat administrators will handle TracDat assignments. Questions concerning personnel assignments should be directed to the Office of Institutional Research.
View Unit Objectives in TracDat

TracDat users will access an Assessment Unit's Objectives under the Plan Tab.

- Click on the Plan Tab.
- Click on the Objectives Sub-Tab.
- Established Unit Objectives are listed and can be edited, reordered, etc.

TIP

This guide uses the term “Objectives.” Among SFA faculty and staff “Objectives” are often referred to as “outcomes,” “student learning outcomes,” “SLO’s,” “program learning outcomes,” “PLO’s,” etc.

TIP

This guide uses the term “field” to refer to the boxes or areas where data is typed, selected from drop down menus, etc.

Click here to “edit,” “copy,” or “delete” established Objectives.
Add New Unit Objectives in TracDat

TracDat users can enter new Assessment Unit Objectives.

- Click the “Add New Objective” button at the bottom of the Objectives screen.
Add New Unit Objectives in TracDat - Continued

After clicking Add New Objective, users will see the Add New Objective Window.

- Click in the Objective Name field. Enter an Objective Name. The Objective Name will be a one or two word descriptive title.
- Next click in the Objective field and enter the entire Objective.
- Next click in the Objective Types window. Choose the appropriate type. In many cases, there will only be one Objective Type option.
- Click on the drop down menu to select an Objective Status, and designate the Objective as Active, Complete, or Inactive.
- Leave the Start Date and End Date fields blank.
- At the bottom of the screen, click Save Changes and then click Return.
- Repeat steps to add additional Objectives.

TIP

To select multiple Objective Types, users should hold down the control key while selecting each type.

To deselect values in the Objective Type field, users should hold down the control key and click on the value to deselect.

Click here to save changes, discard changes, or return to the previous window.
Edit Unit Objectives in TracDat

TracDat users are also able to edit Objectives after entry.

- Click on the Plan Tab.
- Click on the Objectives Sub-Tab.
- To the right of the Objective to be edited, click the “edit” link.
- After the Edit Objective window appears, make adjustments.
- At the bottom of the screen, click Save Changes and then click Return.
- Repeat steps to edit additional Objectives.

Click here to edit, copy, or delete an Objective.
Means of Assessment in TracDat

Each Objective in TracDat should have at least one attached Means of Assessment.

- Click on the Plan Tab.
- Click on the Means of Assessment Sub-Tab.
- Click the Objective Name drop-down menu and choose an Objective.
- At the bottom of the screen, click Add New Assessment Method.
TIP
Options for Assessment Method Category will vary by unit type. Administrative units may see options such as Data Analysis, Focus Groups, and Surveys. Academic units may choose from Embedded Exam Questions, Embedded Course Assignment, or Surveys.

Adding New Means of Assessment in TracDat

Once the user has clicked “Add New Assessment Method,” the Add Assessment Method window will open.

- The Objective Name and Objective will appear in the respective fields and are grayed out indicating that they cannot be edited.
- In the Assessment Method Category drop-down menu, choose the appropriate category for your method.
- In the Assessment Method field, describe the Assessment Method.
- In the Criterion field, indicate the criterion for success for this objective.
- In the Schedule field, outline the planned timeline for collecting data for this Assessment Method.
- In the Active checkbox, indicate if this Assessment Method is currently Active.
- Click Save Changes.
- Click Return.
- Repeat steps to add additional Means of Assessment for this objective or choose another objective and repeat.
Relating Documents to Means of Assessment

TracDat users are able to store all related documents in the TracDat document repository (see Chapter 6). However, specific documents can be related to specific Means of Assessment through the Add Assessment Method window.

Examples of documents that might be related to assessment methods include:

- Survey instrument
- Exam questions
- Essay prompt
- Syllabus

To relate a document to an assessment method:

- Click the Relate Document button.
- Choose to add:
  - A New Document
  - A Document from the Repository
  - A Previously Related Document.
Relating Documents to Means of Assessment - Continued

**To relate to a New Document**, provide the file information in the Add Document window. A New Document is a document that has not been previously submitted to the Document Repository.

- Browse to the file that will be uploaded to the Repository.
- Provide a short file Name.
- Provide a more detailed Description.
- Choose a Repository Folder to store the file.
- Click the “relate document” button.

![Plan Tab Means of Assessment Sub-Tab Relating a New Document](image-url)
Relating Documents to Means of Assessment - Continued

To relate to a Document in the Repository, users will quickly link to the file.

- Choose the folder which contains the Document.
- Click the “relate” link.
Relating Documents to Means of Assessment - Continued

To relate to a Previously Related Document, users will quickly link to the file. • Click the “relate” link next to the chosen document.
Relating Documents to Means of Assessment - Continued

All Related Documents will appear in the Edit Assessment Method window.
Assigning an Assessment Method in TracDat

To assign personnel to provide Assessment Method data, in the Add Assessment Method Window **click the Assign button**.

- Determine the parameters for the assignment.
  - Provide Field
    - Data Only – Assignee will only submit supporting documents to the document repository.
    - Data and Result – Assignee will provide results for specified Assessment Method and will be able to submit supporting documents.
    - Data, Result, and Action Plan – Assignee will provide results for specified Assessment Method, describe an Action Plan, and submit supporting documents.
  - Put Documents in Repository Folder Field - Choose where documents will be stored.
  - Assign To Field - Choose the appropriate Assignee.
  - Due Date Field - Choose an appropriate Due Date.
  - Frequency Field - Indicate if this assignment is only for one collection, is to be collected monthly, annually, etc.
  - Subject and Notes/Instructions field - Provide an appropriate subject for the email and include any instructions.
  - Click the check box for “Email assignment to assignee.”

- Click the “save” button.

---

**Assign Assessment Method Window**

**Means of Assessment Sub-Tab**

**Assigning Assessment Methods**
Assigning an Assessment Method in TracDat - Continued

- Assignee will receive an email with a link to TracDat.

See Chapter 2 for more information on completing email assignments in TracDat.
**Relating Goals in TracDat**

TracDat users can indicate **Related Goals in TracDat**. Relating to goals such as the University Strategic Planning Initiatives or the University Mission Goals will allow for institutional assessment reporting.

For example, consider the following institutional goals.

**Strategic Planning Initiatives 2008-2013**

1. Enhance excellence in teaching and learning, research, scholarship, creative work, and service.
2. Improve faculty and staff compensation, recognition, and support.
3. Increase undergraduate and graduate enrollment.
4. Develop a learner-centered environment.
5. Create new learning opportunities through additional interdisciplinary, international, service learning, and civic engagement experiences.
6. Increase the visibility of the University through marketing initiatives.

**SFA Mission Goals**

1. Stephen F. Austin State University will demonstrate excellence in teaching, research, scholarship, creative work and service.
2. Stephen F. Austin State University will provide students a learner-centered environment.
3. Stephen F. Austin State University will provide student opportunities to prepare for the challenges of living in a global community.

A TracDat user may be asked to relate unit outcomes or objectives to one or more of these University level goals in order to facilitate institutional reporting. Further, administrative support units may be required to relate to VP level goals, academic support units may relate to college-level goals, etc.
Relating Goals in TracDat - Continued

To relate unit outcomes or objectives to higher-level goals:
- Click on the Plan Tab.
- Click on the Related Goals Sub-Tab.
Relating Goals in TracDat - Continued

- Click the Objective Name drop-down menu.
- Choose the Objective which will be related.
- Click the check box for the appropriate higher level goal.
- Click Save Changes.

Finally, TracDat users should note:

- A unit outcome or objective can relate to more than one higher level goal.
- Higher level goals will be addressed by multiple unit outcomes and objectives.
Assessment Result Data

With TracDat, SFA can build a historical record of assessment results and utilize conclusions for decision-making.

Assessment results will be updated in TracDat on a scheduled cycle. Submitting new data is easy, and once training is complete and plans are established, maintaining result data is unobtrusive to users.

Results in TracDat

TracDat users entering data for a unit or department will initially enter all assessment results into TracDat. Thereafter, they will regularly update assessment results for each objective.

- Click on the Results Tab.
- At the bottom of the screen, click Add Result.

TIP

This document refers to the “Assessment Unit” which represents all administrative departments, academic units, core curriculum entries, and academic programs.
Adding New Results in TracDat

After clicking the “Add Result” button, the user will select the appropriate Objective and Assessment Method before entering results.

- In the Select Objective window, to the right of the desired objective, click “select.”

TIP

This guide uses the term “Objectives.” Among SFA faculty and staff “Objectives” are often referred to as “outcomes,” “student learning outcomes,” “SLO’s,” “program learning outcomes,” “PLO’s,” etc.

TIP

This guide uses the term “field” to refer to the boxes or areas where data is typed, selected from drop down menus, etc.
Adding New Results in TracDat - Continued

- In the Assessment Method/Task pop-up window, verify that Assessment Method is selected in the top drop-down menu.
- Choose the Assessment Method in the list that corresponds to the results being entering. Click “select.”
Adding New Results in TracDat - Continued

• In the Edit Result window, begin entering results for the chosen objective and assessment method in the Result field. **Every entry** in the Result field, **MUST** contain the following elements:
  o The number of students enrolled in the course or program (for academic assessments only)
  o The sampling technique used (if appropriate)
  o The sample size for the assessment (if appropriate)
  o The result itself
• In the Result Date field, enter the date the assessment took place.
  NOTE: If unsure of the exact date, estimate the date and verify that the date entered falls within the respective term. i.e. For Fall 2008 results, be sure the date entered falls between 8/15/2008 and 12/31/2008.
• In the Result Type field, indicate whether or not the specified Criterion for the assessment method was met.
• In the Action Status field, indicate the next step for this assessment method.
• The Action Status Update Date will default to the current date and may be changed.
• Click Save Changes.
Creating Action Plans in TracDat

After results have been entered for each objective with the evaluation of the Action Status (Criterion Met, Criterion Not Met, or Inconclusive), TracDat users have the opportunity to establish an Action Plan based on the result data. The Action Plan will direct the path for improvement for the program or course.

- After clicking Save Changes for a new result, another option will appear which allows the user to add an “Action Plan.”
- On the far right side of the screen beside the Action Plan bar, click “add Action”.

![Click here to add Action Plan details.](image_url)
Assessment Action Plans in TracDat

- On the Edit Action screen, locate the Action field. Describe how the results from this assessment will be used for program improvement.
- The Date field will default to the current date and may be changed.
- Click Save Changes.
- Click Return.
Follow-Up Plans in TracDat

At some point after results are gathered and Action plans are put into place, TracDat users should evaluate the effectiveness of the Action Plan. New data should be compared with previously collected data, and previous plans should be reviewed. TracDat users can **report on these Follow-Up activities** in the Results tab.

In the Action Plan sub-tab to the right of your added Action, users will have the option to “add Follow-Up”. The “add Follow-Up” option will be used to evaluate whether the changes suggested were effective.

- To add Follow-Up, click “add Follow-Up” on the right side of the screen.
- In the Follow-Up field, describe how changes have influenced the program or course and the future plans for the initiative.
- Click Save Changes and automatically return to the Results window.
Follow-Up Plans in TracDat - Continued

Add Follow-Up plans here.

Results Tab

Adding a Follow-Up Plan
Relating Documents to Assessment Results

TracDat users are able to store all related documents in the TracDat document repository (see Chapter 6). However, specific documents can be related to specific Assessment Results through the Edit Result window.

Examples of documents to relate to assessment results include:

- Spreadsheet of student scores
- Rubrics used in scoring
- Examples of student work
- Scoring keys

To relate documents to assessment results:

- Choose the Related Documents Tab.
- Click the Relate Document link.

Click here to access Related Documents Tab.

Click here to Relate a Document to a Result.
Relating Documents to Assessment Results - Continued

To relate to a New Document, provide the file information in the Add Document window. A New Document is a document that has not been previously submitted to the Document Repository.

- Browse to the file to be uploaded to the Repository.
- Provide a short file Name.
- Provide a more detailed Description.
- Choose a Repository Folder to store the file.
- Click the “relate document” button.

Enter the new document information.
Relating Documents to Assessment Results - Continued

To relate to a Document in the Repository, users will quickly link to the file.

- Choose the folder which contains the Document.
- Click the “relate” link.
Relating Documents to Assessment Results - Continued

To relate to a Previously Related Document, users will quickly link to the file.

- Click the “relate” link next to the chosen document.

Click here to “relate” the document.
Relating Documents to Assessment Results - Continued

All Related Documents will appear in the Edit Result window.
Editing Results and Action Plans in TracDat

To edit results, dates, result types, action plans or follow-up plans, users should follow the steps outlined previously in this document, and in the appropriate area, click the “edit” link.
Editing Results and Action Plans - Continued

Special Case: Results with No Assessment Method
An assessment method must be defined for every assessment result. In TracDat, it is possible to enter a result and not define an assessment method. In the Select Assessment Method/Task Pop-Up Window, three options are available in the Select drop-down menu. Users should be certain that “Assessment Method” is chosen, and then “select” an Assessment Method from the list. If “Task” or “Neither” is chosen, then there will be no associated means of assessment.

If users make this mistake, the Assessment Method can be added easily by the following procedure:

- Click the Results Tab
- Click the “Show Results” link to reveal your results.
- Click “edit” next to the result.
- Click the Change Objective button at the bottom of the screen.
- Beside the appropriate objective, click “select.”

Now you are able to choose the appropriate Assessment Method.
- In the Select drop-down menu, choose Assessment Method.
- Beside the appropriate assessment method, click “select.”
- Click Return.
EDITIONG RESULTS AND ACTION PLANS - CONTINUED

Results Tab
Editing Action Plans

Click here to edit Action Plans.

Results Tab
Editing Follow-Up Plans

Click here to edit Follow-Up Plans.
TracDat Reports

Collection of data in TracDat is most powerful in its ability to generate reports at the unit, division, or institutional level providing a picture of all levels of assessment.

Reporting in TracDat is quick and easy. The TracDat application has established reports that will provide an easy-to-read layout that is great for viewing on-screen or for printing and distribution. The developed reports will satisfy most needs in academic and administrative units; however, there is also a custom report feature that the TracDat administrator can utilize to develop simple custom reports for individuals with special needs.

Running Reports in TracDat

To run reports in TracDat, users should click on the Reports tab to access the available developed reporting layouts. Most users will only need one or two reports. Additionally, the Reports windows will offer several options for filtering data in reports.
Choosing the Unit Assessment Report – 4 Column

The “Unit Assessment Report – 4 Column” report provides an overview of the plan and result data for the Assessment Unit.

- Click the “run” link beside the report.
REPORTING IN TRACDAT

TIP

Reports can be executed in either HTML or in PDF. For best results, use HTML for viewing on-screen, and use PDF for printing reports.

Running the Unit Assessment Report – 4 Column

- In the reporting window, choose the options that will provide the most meaningful results.
- Click Execute Report.
Viewing the Unit Assessment Report – 4 Column

- After clicking Execute Report the report will open in a new window.
Other TracDat Reports

Other example reports of interest include the Assessment Plan and the Assessment Report. Follow the steps previously outlined to access other types of reports.
TracDat Document Repository

Supporting documentation is a necessity in the assessment process. Assignment prompts, grading keys, tables of assessment data, and rubrics provide an excellent source to establish context in evaluating assessment conclusions.

Document storage is another powerful component of the TracDat assessment management system. Word processing files, spreadsheet files, and scanned images are excellent examples of potential artifacts for the Document Repository.

Accessing Documents in TracDat

To begin utilizing the storage component of TracDat, click on the Documents tab.
Uploading New Documents in TracDat

- To add a new document to the TracDat document repository, click the Add New Document button at the bottom of the Documents screen.
- In the resulting Add New Document window, browse to the file you plan to upload, provide a file name in the Name field, and enter a brief summary of the contents of the new document in the Description field.
Organizing Stored Documents in TracDat

TracDat users can create folders within the Document repository to organize the stored documents.

- Click the Add New Folder button at the bottom of the screen.
- In the resulting Add New Folder window, provide a name for the new folder.
- Move between repository folders using the links with folder icons.
- Rename a folder, share a folder, or delete a folder using the links next to the folder name.
Viewing Current Documents in TracDat

- To view currently stored documents in TracDat, click the “view” link on the right side of the screen.
- In the resulting File Download window, click Open to immediately view the document, or click Save to store the document on your PC for future use.
Editing Documents in TracDat

- To replace a document in the repository with a new version, click the “edit” link to the right of the document you plan to replace.
- In the resulting Edit Document window, enter the information for the new file.
Deleting Stored Documents in TracDat

- To delete an artifact from the document repository, click the “delete” link to the right of the document you plan to remove.
- In the resulting Delete Document window, click Yes.
Completing Email Assignments in TracDat

Individuals responsible for submitting assessment results can easily submit the data via email.

Personnel responsible for assessment data could periodically receive emails prompting submission of results to the TracDat system. To submit the data, those users would simply open the email, click on a supplied link, enter the requested data, and click to save the information. Users who submit results via this method would not actually log into the TracDat system and would only use the system through these email requests.
TIP

This document refers to the “Assessment Unit” which represents all administrative departments, academic units, core curriculum entries, and academic programs.

User Receives Email

When it is determined that assessment results are due for a unit, users will receive an email from a TracDat administrator. The email, which would resemble the one shown below, would contain a clickable link to access TracDat.
COMPLETING EMAIL ASSIGNMENTS

TIP
This guide uses the term “Objectives.” Among SFU faculty and staff “Objectives” are often referred to as “outcomes,” “student learning outcomes,” “SLO’s,” “program learning outcomes,” “PLO’s,” etc.

TIP
This guide uses the term “field” to refer to the boxes or areas where data is typed, selected from drop down menus, etc.

TracDat Interface

Depending on the data required from an Assessment Unit, after clicking the email link, a user would see one of the following screens.

EMAIL REQUEST TYPE 1
Submitting supporting Documents to the TracDat document repository

Examples of documents for the repository include rubrics, student assignment prompts, survey instruments, and tables of assessment data.

- Provide a short name for the submission in the Document Name field.
- Provide a more detailed description of the contents of the document in the Document Description field.
- Click the Browse button to locate the file to be uploaded.
- Click the Add Document button.
- After confirming that the assignment is complete, click the Mark Assignment as Completed button.

Click the Add Document button to upload the document.

Email Request Type 1
Relating Documents
TracDat Interface - Continued

EMAIL REQUEST TYPE 2
Submitting assessment Results and supporting Documents for a specified
Objective, Assessment Method, and Criterion

NOTE: Every entry in the Result field, MUST contain the following elements:
1. # of students enrolled in the course or program (for academic assessments only)
2. Sampling technique used (if appropriate)
3. Sample size for the assessment (if appropriate)
4. Result itself

• Enter results in the Result field.
• The Result Date field will default to the current date. Tracdat users should
  CHANGE THE RESULT DATE to the date the assessment took place.
  (Note: The exact date is not required. An approximate date that falls
  within the appropriate academic term is sufficient.)
• In the Result Type field, indicate whether or not the specified Criterion for
  the assessment method was met.
• In the Action Status field, indicate next steps for this assessment method.
• The Action Status Update Date will default to the current date and may
  be changed.
• Click Save Changes.

Click the Save Changes Button.
TracDat Interface - Continued

EMAIL REQUEST TYPE 2 - Continued
Submitting assessment Results and supporting Documents for a specified Objective, Assessment Method, and Criterion

- To submit documents, click the Relate Document link.
TracDat Interface - Continued

EMAIL REQUEST TYPE 2 - Continued
Submitting assessment Results and supporting Documents for a specified Objective, Assessment Method, and Criterion

Examples of documents for the repository include rubrics, student assignment prompts, survey instruments, and tables of assessment data.

- Click the Browse button to locate the file to be uploaded.
- Provide a short name for the submission in the Document Name field.
- Provide a more detailed description of the contents of the document in the Document Description field.
- Choose a folder location for the document from the Repository Folder drop-down list.
- Click the “relate document” button.

- After confirming that the assignment is complete, click the Mark Assignment as Completed button.
EMAIL REQUEST TYPE 3
Submitting assessment Results, Action Plans, and supporting Documents for a specified Objective, Assessment Method, and Criterion

NOTE: Every entry in the Result field, MUST contain the following elements:
1. # of students enrolled in the course or program (for academic assessments only)
2. Sampling technique used (if appropriate)
3. Sample size for the assessment (if appropriate)
4. Result itself

- Enter results in the Result field.
- The Result Date field will default to the current date. Tracdat users should CHANGE THE RESULT DATE to the date the assessment took place. (Note: The exact date is not required. An approximate date that falls within the appropriate academic term is sufficient.)
- In the Result Type field, indicate whether or not the specified Criterion for the assessment method was met.
- In the Action Status field, indicate next steps for this assessment method.
- The Action Status Update Date will default to the current date and may be changed.
- Click Save Changes
TracDat Interface - Continued

EMAIL REQUEST TYPE 3 - Continued
Submitting assessment Results, Action Plans, and supporting Documents for a specified Objective, Assessment Method, and Criterion

- To establish an Action Plan, click the Action Plan tab.
- Click the “add Actions” link.

Email Request Type 3
Entering Action Plans
TracDat Interface - Continued

EMAIL REQUEST TYPE 3 - Continued
Submitting assessment Results, Action Plans, and supporting Documents for a specified Objective, Assessment Method, and Criterion

- Enter the plan of action in the Action field.
- Change the date in the Date field (not required).
- Click the Save Changes button.

Email Request Type 3
Entering Action Plans
TracDat Interface - Continued

EMAIL REQUEST TYPE 3 - Continued
Submitting assessment Results, Action Plans, and supporting Documents for a specified Objective, Assessment Method, and Criterion

- To enter Follow-Up plans, click the Follow-Up tab.
- Click the “add Follow-Up” link.

![Diagram showing TracDat interface with an example for Email Request Type 3: Entering Follow-Up Plans. Click the Follow-Up tab and click the “add Follow-Up” link.](image-url)
COMPLETING EMAIL ASSIGNMENTS

TracDat Interface - Continued

EMAIL REQUEST TYPE 3 - Continued
Submitting assessment Results, Action Plans, and supporting Documents for a specified Objective, Assessment Method, and Criterion

- Enter Follow-Up plan details in Follow-Up field.
- Change the Date (not required).
- Click the Save Changes button.

Email Request Type 3
Entering Follow-Up Plans
TracDat Interface - Continued

EMAIL REQUEST TYPE 3 - Continued
Submitting assessment Results, Action Plans, and supporting Documents for a specified Objective, Assessment Method, and Criterion

- Click the Return button to continue.
EMAIL REQUEST TYPE 3 - Continued
Submitting assessment Results, Action Plans, and supporting Documents for a specified Objective, Assessment Method, and Criterion

- To submit documents, click the Related Documents tab.
- Click the Relate Document link.
Submit assessment Results, Action Plans, and supporting Documents for a specified Objective, Assessment Method, and Criterion.

Examples of documents for the repository include rubrics, student assignment prompts, survey instruments, and tables of assessment data.

- Click the Browse button to locate the file to the uploaded.
- Provide a short name for the submission in the Document Name field.
- Provide a more detailed description of the contents of the document in the Document Description field.
- Choose a folder location for the document from the Repository Folder drop-down list.
- Click the “relate document” button.

After confirming that the assignment is complete, click the Mark Assignment as Completed button.
Exiting

- After marking the assignment complete, TracDat users will receive a confirmation screen.
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TracDat Users’ Guide
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