THE UNIVERSITY OF MISSISSIPPI

Guide to Entering

Assessment Process Information

into

TRACDAT

Administrative and
Educational Support Units
February 2009

tracdat

For questions or assistance, call 7387 or email assessment@olemiss.edu

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TracDat is a software system for managing the assessment process and collecting assessment documentation. It supports the same five-column model we have been using since 1992.

Internet browsers supported: Internet Explorer; Firefox; Safari

Log on to TracDat

Open your internet browser, and point it to:
http://oldpr2.olemiss.edu:8081/tracdat/

Or you can navigate to TracDat from the Institutional Research and Assessment homepage:

Assessment → TracDat® Assessment Reporting → TracDat® Assessment Reporting (User ID Required)

You will come to the sign-in screen shown below.
Use your Web ID as your Username.
Your initial password was set to "assessment."
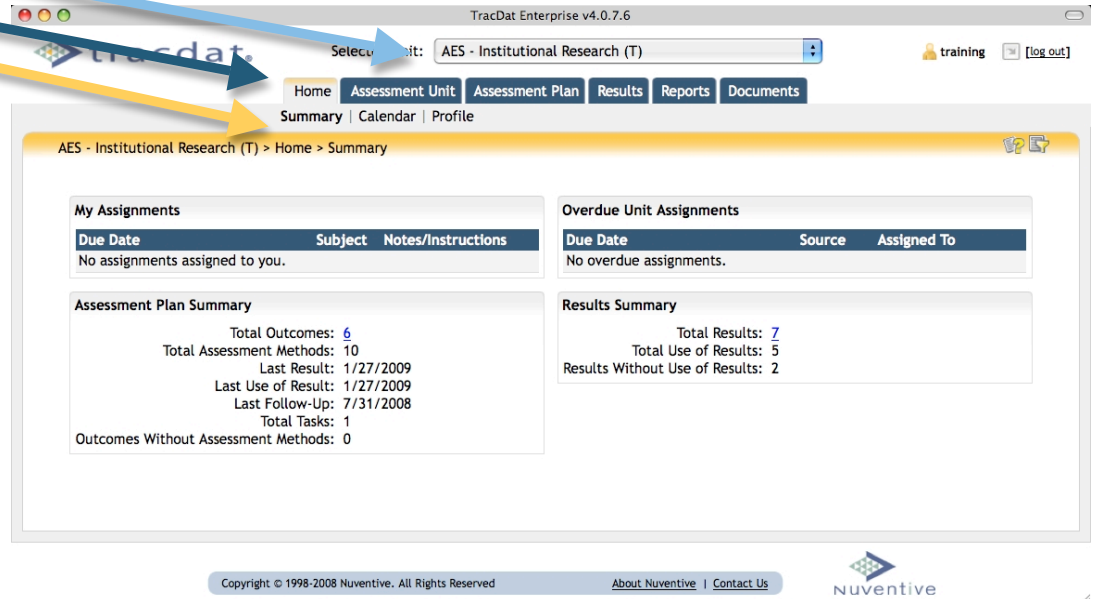

Instructions for changing your password are included at the end of this document. We recommend you change your password as soon as possible.
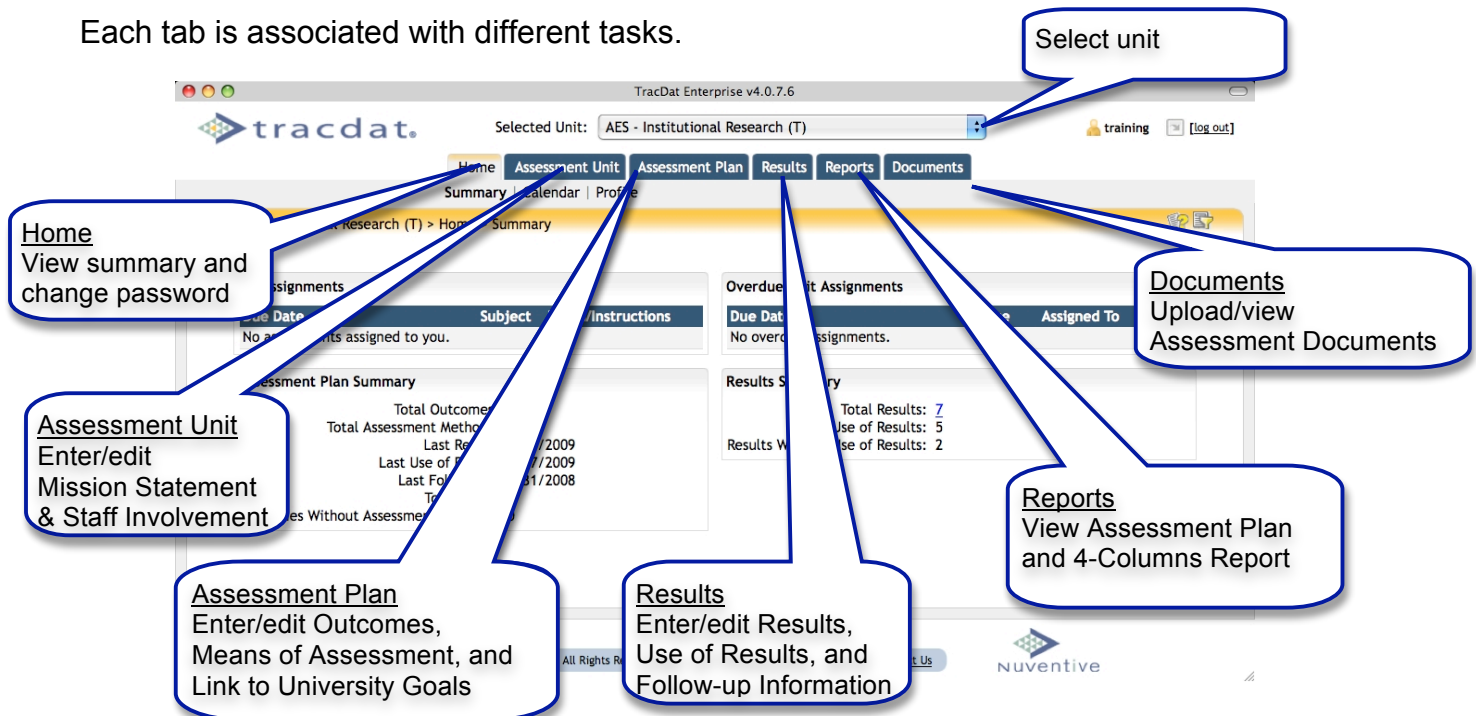
Overview

After log-in, this screen appears. TracDat is organized by:

I. Unit
II. Tabs
III. Sub-tabs

TracDat Enterprise v4.0.7.6

Select Unit: AES - Institutional Research (T)

🔒 training [log out]

Home | Assessment Unit | Assessment Plan | Results | Reports | Documents
Summary | Calendar | Profile

AES - Institutional Research (T) > Home > Summary

My Assignments

Due Date	Subject	Notes/Instructions
No assignments assigned to you.		

Overdue Unit Assignments

Due Date	Source	Assigned To
No overdue assignments.		

Assessment Plan Summary

Total Outcomes: 6
Total Assessment Methods: 10
Last Result: 1/27/2009
Last Use of Result: 1/27/2009
Last Follow-Up: 7/31/2008
Total Tasks: 1
Outcomes Without Assessment Methods: 0

Results Summary

Total Results: 7
Total Use of Results: 5
Results Without Use of Results: 2

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Each tab is associated with different tasks.

Select unit

TracDat Enterprise v4.0.7.6

Selected Unit: AES - Institutional Research (T)

🔒 training [log out]

Home | Assessment Unit | Assessment Plan | Results | Reports | Documents
Summary | Calendar | Profile

Home
View summary and change password

Documents
Upload/view Assessment Documents

Assessment Unit
Enter/edit Mission Statement & Staff Involvement

Reports
View Assessment Plan and 4-Columns Report

Assessment Plan
Enter/edit Outcomes, Means of Assessment, and Link to University Goals

Results
Enter/edit Results, Use of Results, and Follow-up Information

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Get Started

Once you have logged on, you will be at the "home screen."
At the very top of the screen, use the dropdown box to select your unit.

This dropdown box will show the unit(s) you are responsible for. Select the one you want to work on.

Enter Unit Mission and Staff Involvement

Click the blue tab "Assessment Unit" at the top of the screen. Type your mission statement and description of staff involvement in the appropriate boxes. Click Save.

1. Click "Assessment Unit" tab.

2. Type or paste the unit Mission Statement here

3. Provide a description of how the staff are involved in the assessment process in the appropriate box

4. BE SURE TO CLICK ON "Save changes"

Provide evidence of broad staff involvement

Enter Assessment Plans

There are three steps to entering your Assessment Plan:

1. Enter your **Outcomes**
2. Enter the **Means of Assessment** and **Criteria for Success** associated with each **Outcome**.
3. Link each **Outcome** to a University **Goal**.

> An **Outcome** describes what students learn as a result of your services or describes a current service or process you perform.

To begin, choose "Assessment Plan" at the top of your screen.

Click on "Assessment Plan" tab

Please note:
Do not delete *Outcomes* or *Means of Assessment* from previous Assessment Cycles, as this will delete the results, use of results and notes. See Refining Assessment Plans for more information.

Step One: Enter Outcomes Statements

If you have previously entered outcomes, they will be displayed on the "Assessment Plan" screen. To add a new outcome, choose the "Add New Outcome" tab at the bottom of the screen.

Click "Add New Outcome" tab

To create a new Outcome:
- First, choose a short descriptive name for your Outcome.
- Next, type in the entire Outcome statement.
- For Outcome Type, select the Assessment Cycle(s) in which the outcome will be assessed
- Choose "Currently Assessing" as your "Outcome Status" from the dropdown box.
- The *start date* should be *September 1* first year of the assessment cycle and the *end date* should be left blank until you are no longer assessing the outcome.

Important: Be sure to click on the "Save Changes" tab at the bottom.

Outcomes = current services; what clients are able to do as a result

Hint: You can run **spellcheck** by clicking on the "abc" icon in the top right corner.

1. Choose a short descriptive name

tracdat®

Selected Unit: AES - Institutional Research (T)

Home | Assessment Unit | Assessment Plan | Results | Reports | Documents

Outcomes | Means of Assessment | Related Activities | Related ats

AES - Institutional Research (T) > Assessment Plan > Outcomes > Add New Outcome

2. Enter your entire Outcome

7. After you have **saved** the information, choose "Means of Assessment" at the top of the screen.

Outcome Types & Periods:

Current Outcome Status:

Start Date:

End Date:

3. Choose the appropriate time frame. (Note: If an outcome is assessed in multiple years, highlight multiple years by pressing Ctrl key while clicking the appropriate years.)

4, Choose "Currently Assessing"

6. BE SURE TO CLICK ON "Save changes"

5. Use the appropriate start date for this outcome based on when you *began* assessing it; for example, 9/1/2007. The end date is entered only when the outcome is not longer applicable to your unit. Leave it blank for now.

Save Changes   Discard

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Step Two: Enter Means of Assessment and Criteria for Success

Now you are ready to enter your Means of Assessment.
Click on the "Add New Assessment Method" tab at the bottom of the screen.

Use the drop down menu to select the outcome name

Choose "Add New Assessment Method"

Good "Means of Assessment" are likely to provide information specific enough to help you determine what improvements could be made

Each Outcome has **2 or more** Means of Assessment with at least 1 direct measure

First you must select an Assessment Method Category from the dropdown box.

Then enter your:
 Means of Assessment,
 Criteria for Success, and
 Schedule for data collection.

Important: Be sure to click on the "Save Changes" tab at the bottom.

Hint: You can run spellcheck by clicking on the "abc" icon in the top right corner.

1. Select from dropdown box

2. Describe your Means of Assessment

3. Enter your Criteria for Success

4. Describe when you will collect the data

5. BE SURE TO CLICK ON "Save changes"

6. After saving changes, click on "Return"

Use Specific Criterion for Success

After selecting "Return" at the bottom of the screen, you will be presented with the summary screen that displays your Outcome, as well as the Means of Assessment, Criteria for Success, and schedule that you've entered.

Now you can repeat Step 2 to enter additional Assessment Methods or choose "Return to Outcome" if you do not have an additional Means of Assessment.

Please note: Each Outcome Statement should have at least 2 Assessment Methods.

Selecting "Return to Outcome" will bring you back to the screen that displays the Outcome Statement for which you have just added means of assessment.

Select "Outcomes" to return to the list of Outcomes you have entered.

You can repeat Steps 1 and 2 to enter additional Outcomes and Means of Assessment. Be sure to SAVE CHANGES before navigating away from a text entry screen.

Assess 3-5 Outcomes during a cycle

Step Three: Link Each Outcome to the Appropriate University Goal(s)

The final step is to link *each Outcome* with the appropriate University Goal. To do this, choose "Related Goals" from the top of the screen.

This will bring you to the screen that allows you to link each of your Outcomes with one or more of the University Goals. First select an Outcome from the dropdown box, using the short name you assigned. Then check the University Goal(s) supported by that Outcome.

Be sure to hit SAVE CHANGES after each Outcome.
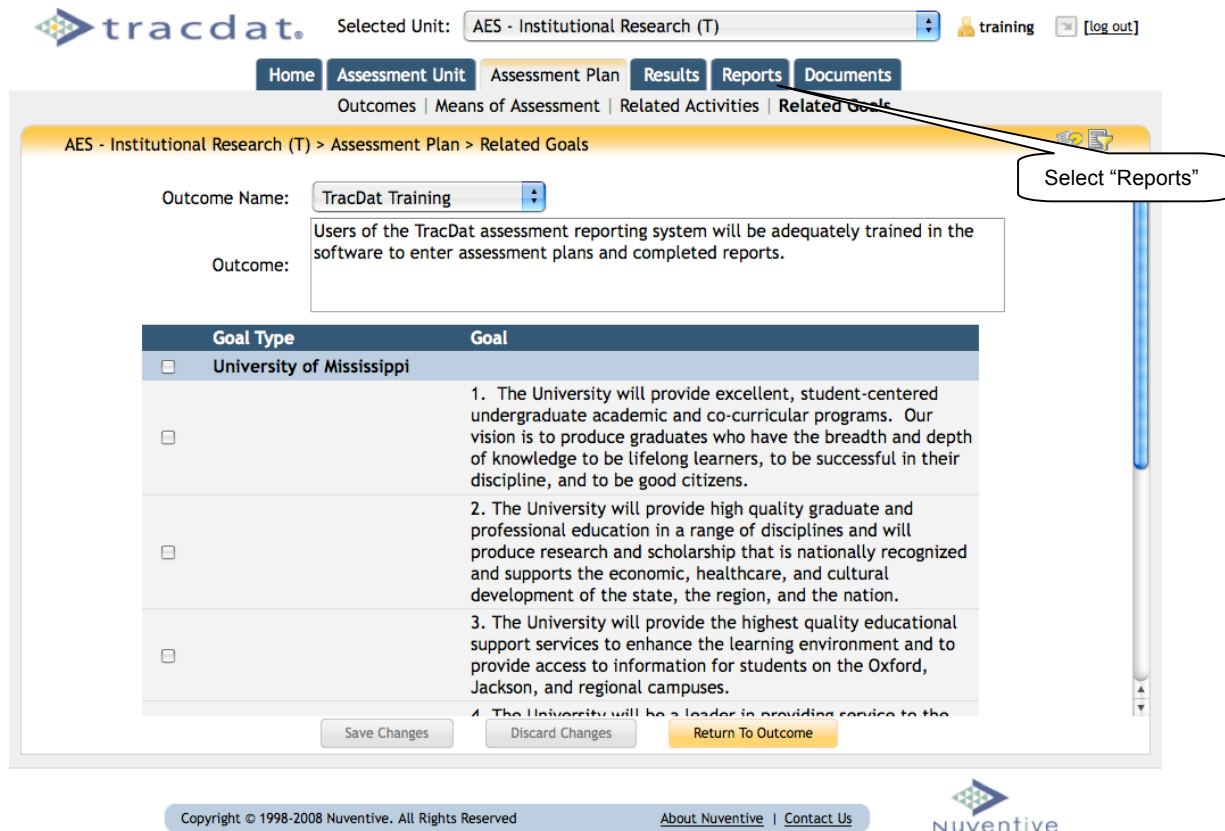
Repeat the process for each Outcome until all are linked.

Refine Assessment Plan

View Plan

After you have finished entering all your Outcomes, Means of Assessment, and Criteria for Success and have linked each Outcome to a University Goal, you may wish to verify that all the information has been entered correctly by running a Report.

To do this, click on the "Reports" tab at the top of your screen.

Because you want to look at the PLAN you just entered, select "run" next to the Assessment Plan and Description.

You will then be presented with a number of options.

Format: Select "PDF (suggested for printing)" or "HTML (suggested for view)" depending on whether you will be printing the report or viewing it on the screen.

Report Title: This will default to "Assessment Plan." Feel free to edit this title.

Current Outcome Status: Choose "Currently Assessing."

Select "Include Institution Goals" to verify you have linked all your Outcomes to a University Goal. Unclick all other boxes.

The following report will be generated in a new window or tab.

Assessment Plan

University of Mississippi

AES - Institutional Research (T)

AES - Institutional Research (T)

Unit Mission Statement: The Office of Institutional Research and Assessment collects, organizes and disseminates ... al institutional data; analyzes internal, external and peer data to support decision-making and planning; a... ...ges the University's institutional effectiveness process. This is a test.

Staff Involvement: All staff in Institutional Research and Assessment are involved in assessment planning, conducting ... assessment, analyzing the data, and making decisions about using the results of assessment to make improvements.

Outcome: Accurate Historical Data

The department will maintain accurate records of hisortical student and course data.

Outcome Type & Period: Administrative 9/1/2006 - 8/31/2008
Start Date: 09/01/2006
Current Outcome Status: Currently Assessing

To return to TracDat, close new window or tab

Means of Assessment

Assessment Method	Criterion	Schedule	Active
We will run a set of edit reports for two sets of student and course data for the Fall 2008-09: Enrollment and Outcomes. Then an analysis will be done of the number of errors in the following six categories: 1. Student Classification (hours do not match classification category of freshmen, sophomore, etc.) 2. Mismatches between Organizational Unit and Program 3. Mismatches between admissions category and classification 4. Missing delivery mode and category on courses 5. Invalid Social Security Numbers 6. Residency errors (missing counties, mismatches) **Assessment Method Category:** Accuracy Check	There will be no mroe than 20 student classification errors. There will be no more than 25 mismatches between organizational unit and program. There will be no more than 25 instances of mismatched admissions category and classification. There will be no mroe than 25 missing delivery modes or categories on courses. There will be no more than 2 invalid social security numbers. There will be no more than 25 residency errors.	This accuracy audit will be performed during the Fall of 2008-09.	Yes
Once data has been edited and corrected, files are sent to the IHL. The IHL runs reports using the data and returns error reports to us. Our second Means of Assessment will analyze the IHL error reprots for the Fall of 2008-09 for three files: Enrollment, Outcomes, and Financial Aid. The following three types of errors will be analyed: 1. Invalid high school or community college codes 2. High school GPA errors 3. Community college transfer GPA errors **Assessment Method Category:** External Audit/Evaluation	There will be no more than 20 valid high school or community college errors. There will be no more than 10 high school GPA errors. There will be no mroe than 10 community college transfer GPA errors.	This audit will be performed during the Fall of 2008-09	Yes

Related Goals

University of Mississippi

Shows linkage between Outcome and University Goal

  * 4. The University will be a leader in providing service to the public, through the application and dissemination of its expertise and knowledge, in Mississippi, the region, and the nation.

  * 6. The University will maintain efficient and effective administrative services to support the University's instructional, research, and public service programs. The University will be a good steward of its resources.
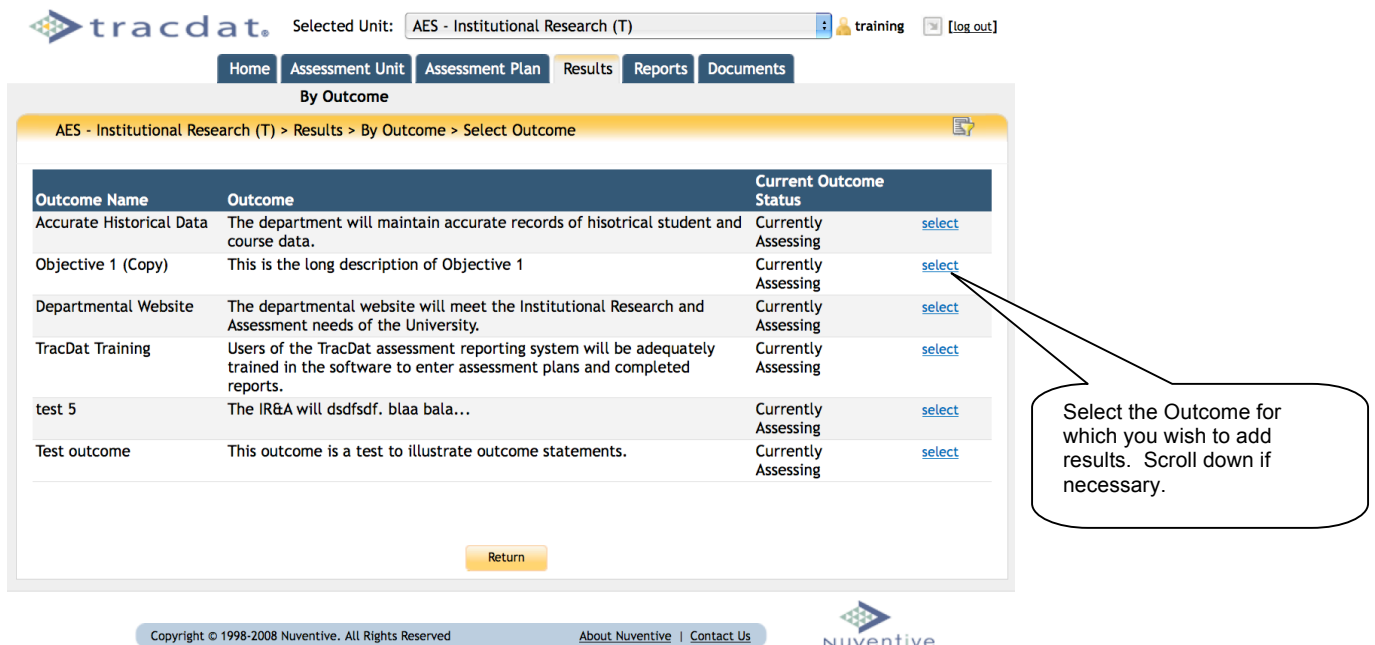
To get back to the TracDat system, close the window in which the report is displayed by clicking on the red "X" at the top right of the *report*.

Note: Be sure you click the "X" at the top of the report and not the one associated with TracDat.

Edit Plan

Suppose you find that you need to edit your Outcome or some of the information associated with your Means of Assessment.

To make changes, make sure the "Assessment Plan" tab at the top is highlighted; then select either "Outcome" or "Means of Assessment" depending upon what you want to edit.

The example below illustrates the steps to edit your Outcome.

You may also select the **"copy"** function if there is an Outcome or Means of Assessment that you want to copy. This will result in duplicated Outcomes and Means of Assessment that you can then edit.

Please do NOT use the "delete" function (as this deletes associated fields as well) but instead rely on the "edit" function to make corrections.

Change Outcome Status

Instead of deleting older Outcome statements, you may change the status to "No longer an Outcome" or "Not Currently Assessing".

To make this change, select "Assessment Plan" tab and the "Outcomes" sub-tab. Click "edit" by the outcomes you would like to modify

Use the drop down menu by the "Current Outcome Status" to change the status. Remember to save your changes.

Change Means of Assessment Status

Instead of deleting older Means of Assessment, you may change the status from "Active" to not active.

To make this change, select "Assessment Plan" tab and the "Means of Assessment" sub-tab. Select the Outcome for which you'd like to change the means of assessment. Click "edit" by the Means of Assessment you would like to modify.

Scroll to the bottom of the edit window. Uncheck the check-box next to "Active".

Attach Documents

TracDat provides the opportunity for you to attach documents to your Assessment Plan and Report.

To attach a document:

Click the blue "Documents" tab at the top of the screen.
You may want to click on "Add New Folder" at the bottom to organize your files.
Finally, click on "Add New Document" at the bottom of the screen.

Then next steps are:
  Browse your computer to select the appropriate file
  Give it a name and description
  Then click "save" to upload the document.

This results in the document being uploaded to TracDat and thus available for viewing to anyone who can see your Assessment Plan.

Relating Documents to Assessment Plans

From the Means of Assessment edit screen, select "Relate Document". Choose the document source.

Follow the on-screen instructions. Here's an example for relating a document stored in the Document Repository. Select the appropriate folder and click "relate".

Enter Assessment Reports

Step One: Enter Assessment Results
To enter assessment results:

Click the blue tab "Results."

Then click on the "Add Result" tab at the bottom of the screen.

Select the appropriate outcome by clicking **select**.

Select the Assessment Method by clicking <u>select</u> on the appropriate Assessment Method. Scroll down if necessary.

Follow the on-screen instructions. Here's an example for relating a document stored in the Document Repository. Select the appropriate folder and click "relate".

Results = Specific data linked to the criterion for success

In the "Result" box, describe the data that has been collected and analyzed.

Then select the appropriate "Result Type" from the drop down menu.

Select the appropriate "Result Status" from the drop down menu.

Use the notes block to make internal notes about the entries made on this screen.

Be sure to click "Save Changes" to save your results.

If you have documents (such as spreadsheets, logs, etc.) that support your data collection or analysis, save them in the TracDat Documents Repository by clicking the "Related Documents" tab at the bottom left.

Step Two: Add Use of Results

When you are ready to add a "Use of Results" for this assessment method, click "add Use of Results" near the bottom right.

Documents concerning data analysis that have been saved in the TracDat Documents Repository can be related by clicking the Related Documents tab. Follow instructions provided earlier for relating documents.

To add a description of the "Use of Results," click "add Use of Result."

Criterion not met – Use data to make specific unit improvements

Criterion met – Revise Outcome, Assessment Means, or Criterion for success

In the "Use of Results" box, describe the improvements in services, processes, research, or learning outcomes that have been made based on the assessment data.

Be sure to click "Save Changes."

1. Describe the improvements in services, processes, research, or learning outcomes which the unit has made that are based on the data presented for this Assessment Method.

2. Be sure to click "Save Changes" to save the data.

Select the appropriate choice for "Result Status" from the drop-down menu. Improvements that have not been completely implemented at the time the assessment report is due should be updated later by clicking "add Follow-up."

When the improvement has been completely implemented and reassessed and determined to be effective, the Result Status should be changed to, "Improvement Actions Completely Implemented."

Improvements that have not been completely implemented at the time the assessment report is due should be updated by clicking "add Follow-Up."

Refine Assessment Report

View Report

Assessment reports can be generated that show the entire assessment report by clicking "Reports" in the set of blue tabs. Select the report titled "Assessment Impact by Unit Objectives" and click "Run" on the right side of the screen.

Select "Currently Assessing" and select the appropriate Period. Click "Execute Report."

The PDF or HTML report comes up as a different screen. Drag the scroll bar on the right to view the entire report. When this report is FINAL after review of the assessment committee, it can be saved in a documents folder created in the Documents Repository so the unit has a complete history of its assessment work.

Example of Assessment Impact by Unit Objectives Report

Drag Scroll Bar down to view entire report, including assessment results and use of results.

Report opens a new screen. You may save, print, or send the report by email if you select pdf format. To close the screen, click the red "x" for the report, not for TracDat. TracDat will be available.

Example of Four Column Report

Drag Scroll Bar down to view entire report, including assessment results and use of results.

Report opens a new screen. You may save, print, or send the report by email if you select pdf format. To close the screen, click the red "x" for the report, not for TracDat. TracDat will be available.

Edit Results and Use of Results

On occasion you may wish to make text edits to the results, change the result status, edit the use of results, or follow-up information.

To add new results, remember to use "Add Results" rather than the edit process.

Select the result you would like to edit, by clicking the "Results" tab, toggling the show/hide results for the outcome, and clicking edit.

Edit the portions of the results you would like.

Edit Use of Result

You may wish to make text edits to the Use of Results. To do so, click "edit" from the Edit Results screen.

> To add new use of results or provide additional detail about actions taking place after the initial report is complete, remember to use "Add Use of Results" or "Add Follow-Up" rather than the edit process.

Click "edit" for the use of results you would like to edit.

Make any textual corrections you would like to the use of results. Remember to Save your changes.

Make text edits to the Use of Results.

Please use "Add Use of Results" for new uses of your results or "add Follow-Up" instead of editing!

Be sure to click "Save Changes" to save your changes.

Add Follow-Up Information

To add information about improvement implementation, use the "add Follow-up" button next to the use of results you would like to amend on the Edit Results screen.

Click "add Follow-Up".

Enter the information in the block for "Follow-up."   Remember to click "Save Changes."

Descriptions of follow-up actions should be entered here. Each follow-up action is date stamped so the reader has a history of actions taken to implement improvements.

Be sure to click "Save Changes" to save the data.

Relating Documents

Also see Attach Documents in Revise Assessment Plan for Document Repository instructions.

TracDat allows you to store and attach documents to your assessment report. This is useful for providing tables and/or detailed data not easily described in the Result text.

To relate a document use the "Relate Document" button from the Edit Results screen.
Then choose the source for your document. Suggestion: Consider storing all documents in the Document Repository.

Follow the on-screen instructions. Here's an example for relating a document stored in the Document Repository. Select the appropriate folder and click "relate".

Access "Help" or Description of Function Box

Click the "?" on the side of a box for additional assistance or description of box contents.

Change TracDat Password

From the Home Tab and Profile sub-tab, select "change password".

Then enter your current and new password and <mark>SAVE CHANGES.</mark>

Good Luck!

If you have any questions, please call 915.7387 or email assessment@olemiss.edu.