Guide to Entering

Assessment Process Information

into

TRACDAT

Administrative and Educational Support Units
February 2009

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

Log on to TracDat ...................................................................................................................................................... 2
Overview ..................................................................................................................................................................... 3
Get Started ................................................................................................................................................................. 4
Enter Unit Mission and Staff Involvement ................................................................................................................ 5
Enter Assessment Plans ............................................................................................................................................... 5
Step One: Enter Outcomes Statements .................................................................................................................... 6
Step Two: Enter Means of Assessment and Criteria for Success ............................................................................... 8
Step Three: Link Each Outcome to the Appropriate University Goal(s) .................................................................. 12
Refine Assessment Plan ............................................................................................................................................. 13
View Plan ..................................................................................................................................................................... 13
Edit Plan ..................................................................................................................................................................... 17
Change Outcome Status ............................................................................................................................................ 18
Change Means of Assessment Status ........................................................................................................................ 19
Attach Documents ....................................................................................................................................................... 20
Relating Documents to Assessment Plans .................................................................................................................. 21
Enter Assessment Reports ......................................................................................................................................... 23
Step One: Enter Assessment Results ........................................................................................................................ 23
Step Two: Add Use of Results .................................................................................................................................. 26
Refine Assessment Report ......................................................................................................................................... 29
View Report ............................................................................................................................................................... 29
Edit Report ................................................................................................................................................................. 31
Edit Use of Result ...................................................................................................................................................... 32
Add Follow-Up Information ....................................................................................................................................... 33
Relating Documents .................................................................................................................................................. 34
Access “Help” or Description of Function Box .......................................................................................................... 35
Change TracDat Password ......................................................................................................................................... 36
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

Each tab is associated with different tasks.

- **Home**: View summary and change password
- **Assessment Unit**: Enter/edit
  - Mission Statement
  - Staff Involvement
- **Assessment Plan**: Enter/edit Outcomes,
  - Means of Assessment, and
  - Link to University Goals
- **Results**: Enter/edit Results,
  - Use of Results, and
  - Follow-up Information
- **Documents**: Upload/view Assessment Documents
- **Reports**: View Assessment Plan and 4-Columns Report

Select unit
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.

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.

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.
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.

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

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

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

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.

1. Choose “PDF (suggested for printing)” or “HTML (suggested for viewing”)
2. Edit the Title if you desire
3. Check “Include Goals” to ensure each of your Outcomes is linked to a University Goal
4. Click on “Execute Report”
The following report will be generated in a new window or tab.

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.

1. Make sure you have selected the “Assessment Plan” tab and “Outcomes” sub-tab at the top.

2. Click “edit”.

3. BE SURE TO SAVE YOUR CHANGES

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

2. If you selected “No Longer an Outcome”, enter the date the Outcome ended.
**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”.
- Be sure to save your changes.
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.

1. Click “Documents”
2. You may choose to “Add New Folder” to organize your documents, and give it a folder name.
3. Choose the folder in which you want the document to be stored
4. Next choose “Add New Document”
Then next steps are:

1. Browse your computer to select the appropriate file
2. Give it a name and description
3. 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”.

1. Select the folder where the document is stored
2. 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.

1. Click the blue tab “Results.”

2. Click “Add Result” to add an assessment result.

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

1. Describe the data that has been collected. Be specific. If you plan to present assessment results in table format, save your Word, Excel or other document in the TracDat documents folder.

2. Use the drop down menu to identify the Result Type as Criteria Met or Criteria Not Met.

3. Use the drop down menu to identify the Result Status regarding improvement actions.

4. Be sure to click “Save Changes” to save your assessment 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.

Criterion not met – Use data to make specific unit improvements

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

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

1. To generate a copy of your assessment report, click “Reports” in the set of blue tabs.

2. Select the “run” by “Assessment Impact by Unit Objectives”

or Select the “run” by “Unit Assessment Report – Four Column”

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

1. Choose “PDF (suggested for printing)” or “HTML (suggested for viewing)”

2. Edit the Title if you desire

3. Select “Currently Assessing.”

4. Select Period.

5. 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.

1. Click the blue tab “Results.”
2. Toggle the Show/Hide Results button
3. Click “edit” for the result you would like to edit.

Edit the portions of the results you would like.

- Make text edits to the Results.
- Please use “Add Results” for new results instead of editing!
- Modify the Result Status regarding improvement actions.
- The Notes block is used for the assessment units’ own internal information.

Be sure to click “Save Changes” to save your changes to assessment results.
**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.

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”.

1. Click Related Documents
2. Click Relate Document
3. Click the source for the document.
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”.

1. Click “Home”
2. Click “Profile”
3. Click “Change Password”

Then enter your current and new password and **SAVE CHANGES**.

1. Enter current and new password.
2. Be sure to **SAVE CHANGES**
Good Luck!

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