TracDat User Quick Guide: Academic Units

Function	Process	Notes
Log In	• Log in to https://tracdat.evp.utexas.edu • Log in with EID • [redacted]	
Selected Unit	• Pull down menu shows which plans you are authorized to edit	
Home Tab: Summary, Calendar, and Profile		
Summary	• Provides overview of selected unit plan, including number of Program Educational Objectives, outcomes, results and analysis, and actions • *My assignments*: work assigned to you • *Program Educational Objective (PEOs) Summary*: how many PEOs included in the selected plan • *Results and Analysis Summary*: how many results and analysis and actions taken for selected plan	~PEO = what your graduates will achieve or accomplish within the first few years after matriculation
Calendar	• Provides monthly view of assignments and deadlines • You can enter and see assignments due • You can send tasks to Outlook with a link to the assignment due	
Profile	• Shows name, email, and title information • Change password: select button at the bottom of the page; change your password the first time you log in	~Do not use your UT EID password as your TracDat password
Assessment Unit Tab: General, Program Educational Objectives, and Personnel		
General	1. *Mission*: Enter and save program mission 2. *Responsibility and Implementation Process*: Enter who is responsible for designing, monitoring, carrying out, and analyzing assessment plan	
Program Educational Objective	1. Click *Add New Program Educational Objective (PEO)* button at bottom of page 2. In *Objective Type* pull down menu, select *PEO* 3. Copy and paste or type relevant PEO into the text box 4. Click *Save Changes* 5. Continue to click *Add New Program Educational Objective* until all are input	
Personnel	Shows individuals with access to that plan	
Assessment Plan Tab: Outcomes, Methods, and Related Program Educational Objectives		
Outcomes	1. Click *Add New Outcome* 2. Give the outcome a brief name in the Outcome Name box 3. Write the outcome in the text box 4. In *Assessment Cycles*, hold down *Control* key and select the year when the outcome will be assessed 5. In *Outcome Status* select *Active* if outcome is part of current cycle plan or *Inactive* if outcome is not included on current plan	~If you make a slight change from one year to the next, make a note what was changed and when ~If the change is significant, you could elect to make an outdated outcome inactive and create a new outcome

	(regardless of whether it is being assessed for a given year) 6. Select a *Start Date* for when the outcome <u>was first used</u> 7. Leave *End Date* blank unless the outcome will be made inactive 8. If you are making an outcome inactive, mark the end date (last date it is used) 9. Click *Save Changes* after entering outcome 10. Click *Return* 11. Click *Add New Outcome* to add another one and repeat steps	~If you want to copy an outcome to another unit, use the *Copy* feature next to the name of the outcome ~You can rearrange order of Outcomes using the small up or down arrows to left of *Outcome Name*
Methods	1. Next to *Outcome Name*, you will see a pull down list of outcomes you entered in the previous step *2.* Select one and click *Add New Assessment Method* 3. In *Assessment Method Category*, select type of assessment method you are using 4. In *Assessment Method*, describe the method you are using to assess that outcome, including as much detail as possible about what is involved 5. In *Criterion*, describe the level of performance (target) for that method 6. In *Schedule*, describe when and where the data will be collected 7. Click *Save Changes* 8. If you would like to attach a document to the method (e.g., rubric, exam, report) click *Relate Document* to upload the document. The document will show up on the Assessment Method as a hyperlink 9. Click *Return* 10. Click *Add New Assessment Method* if you have more than one method for that outcome	~ If you change a criterion from one year to the next, add a note in the *Criterion* box about the change ~If it's a significant change, consider selecting a different assessment method
Related Program Educational Objectives (PEOs)	1. Map how this outcome supports the higher level PEOs 2. In *Outcome Name* pull down, select the outcome you want to relate 3. Select the check box(es) next to the appropriate PEO 4. Click *Save Changes* 5. Select the next outcome and check the appropriate PEO	~You can also relate the outcome to other goals - unit, institution, etc. - as they are made available to you
Results and Analysis Tab: By Unit		
Add Result	1. Click *Select* next to outcome for which you want to add a result 2. In *Select* pull down menu select *Assessment Method* or *None* 3. Use *None* if there are results related to the outcome but not tied to a specific assessment method 4. Click on *Select* next to the Assessment Method for which you want to add a result 5. In *Results and Analysis*, enter appropriate results and describe the interpretation of results. This is a text summary of results 6. *Result Date* will default to the date you entered the results 7. In the *Result Type* pull down, select *Met Criterion*, *Criterion Not Met*, or *Inconclusive* 8. Use *Inconclusive* if you encountered some problem in data collection or if you collected formative data	~WHEN YOU ADD RESULTS FOR ANOTHER RESULT'S CYCLE, DO NOT EDIT OR DELETE ANY EXISTING RESULTS. ADD A NEW RESULT AND SPECIFY A

	9. In *Reporting Cycle*, select the year to which this results belong 10. *Reporting Cycle Update Date* shows the last time result was updated 11. Click *Save Changes* 12. If you put results in wrong area, you can move them to different outcome and assessment method by using *Change Association*	DIFFERENT RESULTS CYCLE. This way, you will create a continuing record of results over time. ~Once you post results to an outcome, you cannot delete that outcome.
Related Documents	1. Click the *Related Documents* tab 2. Click the *Relate Document* link on the right side and choose the method for uploading a document	~Use this to upload any raw data or supporting results documents (e.g., tables, spreadsheets, etc.)
Action Taken	1. Click the *Actions Taken* tab 2. Click the *Add Actions Taken* link on the right side 3. Enter the action taken in the text box 4. Click *Save Changes* 5. If you want to add a follow up to the actions, click on the *Add Follow Up* link next to the action taken and enter text in the follow up text box 6. If you want to add actions taken for the outcome as a whole, not a specific assessment method, when you click on the outcome in the *Results and Analysis* section select *None* in the pull-down menu rather than a specific *Assessment Method*	~If you write action taken in future tense, you should add a follow up to indicate those actions were completed
Reports Tab: Assessment Unit, Course, Ad Hoc		
Assessment Unit	• Shows Report options	
Assessment Plan Report	• Shows various features of the assessment plan • Can select by outcome status, assessment cycles, etc. • Can choose to create it as PDF, HTML, or RTF (Word) • If you attached any documents to assessment methods, then a hyperlink would display on document that you can click on to view that document • Select *Features* and click *Open Report* • If you click *Download as Zip*, then the reports and all attached documents are included • Clicking *Save to Document Repository* will save a copy of the report to the document repository	
Unit Assessment Report – Four Column	• Shows outcomes, means of assessment, results & analysis, and action taken & follow up • Can select by outcome status, assessment cycles, assessment methods, dates, result types, e.g., criterion met or not met • If you attached any documents to the assessment methods a hyperlink would display on the document that you can click on to view that document • Select *Features* and click *Open Report* • Outcome Relationships: shows how PEOs align to Outcomes	
Outcome Relationships Report	Shows each of the PEOs/outcomes of the selected unit and any outcomes at the institution that support those goals	

Documents List Report	Report lists all documents (files) stored in each folder for each unit.	
Course	This report shows the courses per unit	
Ad Hoc	1. Click *Create New Ad Hoc Report* 2. Click *Output type* (PDF, HTML, Excel, RTF) 3. Provide a Title and Subtitle (optional) 4. Provide a Description (optional) 5. Select the *Data View* you want to use from the pull down menu 6. Once you select *Data View*, you will see a list of units available. Use the control button to select the units to include in the report 7. Using the check boxes, select fields to include on report 8. If you want to group the output by a specific field select *Group by this column* link to the right of the field name 9. You can change the field widths to make them smaller or larger 10. You can order the fields by clicking on the up or down arrows by the name of the field 11. You can add a filter to the report by using the pull-down menu a. Where "Filter =" Select a filter type from the pull-down menu b. Relationship: Select how the filter should be applied (equal to, greater than, etc.) c. Value: Input the filter value you want to use (e.g., 50) d. Click *Insert* e. Can add "AND" or "OR" filters 12. Click *Run Report* 13. Click *Save* to save the report parameters for a report that you are going to run repeated times	~TracDat administrators can create custom data views for reports. The two reports you are most likely to use: Assessment Unit – Assessment Plan view Assessment Unit – Unit Results and Analysis view
Documents Tab: Documents Repository and Related Documents		
Documents Repository	• You can create folders in which to upload documents to store in the repository – document warehouse • These documents may be related to other parts of the plan or may be stored here and do not need to be related to another part of the plan or results • You can relate documents within the repository or select them within the method, results, etc. • You can use a Word document, video file, URL, Excel file, etc. • You can share your folders with other units • Select folder you want to share • Select *Share Folder* • Select other units to which you have access to share the folder	~ You may use this area to upload past OATS plans/results for archival purposes ~You can not create nested folders
Related Documents	• Shows all uploaded documents and their association • You can use the Location pull down menu to determine which document areas you want to view (All, Activity, Means of Assessment, Results and Analysis)	