

# TracDat User Guide

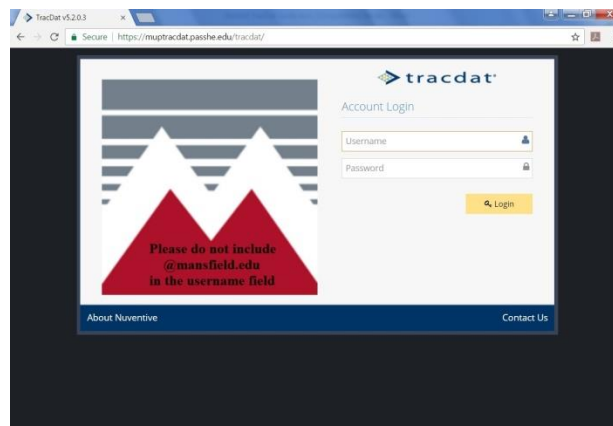
## System Overview

TracDat is an online assessment and strategic planning system developed and hosted by Nuventive, Inc. TracDat was developed as a management tool to meet assessment and planning needs and to overcome common obstacles of assessment. TracDat closes the loop between planning and action. The templates within TracDat assure a uniformity of reporting that simplifies collection, review, management, and utilization of data. As a web-based application, users can access the program from anywhere they have an Internet onnection. It is designed to facilitate entry of assessment plans and results/analysis at the course, program, department, college, and university levels. TracDat provides users with a collection of pre-formatted reports that address critical aspects of the assessment cycle. Information relevant to assessment at all levels of the organization can be efficiently stored and access through the web-based application. More information about TracDat can be found at <http://www.nuventive.com>.

## Accessing TracDat

To access TracDat, visit the following website: <https://muptracdat.passhe.edu/tracdat/> (or access the TracDat link through Quick Links).

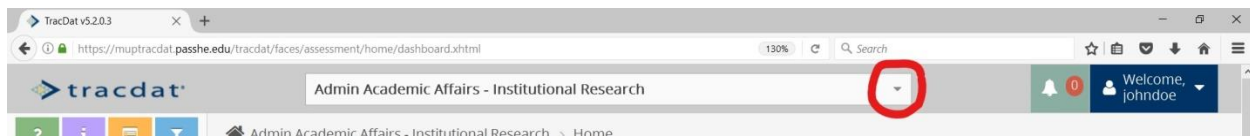
The screen below will appear:



- Returning users: Enter your TracDat Username and Password (the Username is your email without @mansfield.edu)
- First-time users: Contact the Office of Institutional Research and Assessment Data to request access to TracDat.

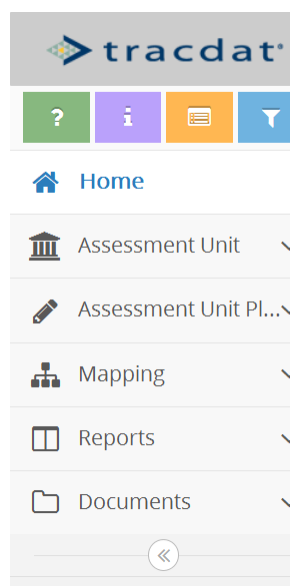
## Select Desired Assessment Unit

After entering TracDat, you will see a drop-down box at the top center of the screen that can be used to select the appropriate assessment unit.



When you select the dropdown arrow, you should see the assessment unit(s) that you have permission to access. If you have access to many units, you can use the search box to locate a unit quickly. Contact the IR Director if you do not see the assessment unit to which you have been assigned. **If the Assessment Unit has a z in front of it, that assessment unit has archived data and is not currently active. Do not upload any new information to that assessment unit.**

After logging into TracDat, users will notice that the current configuration of TracDat includes six tabs. These tabs are on the left side of the screen. Each user is provided tailored access, and the tabs available will vary according to the permissions granted by the TracDat administrator.



**Note:** If you are accessing TracDat on a small screen (such as a smart phone), your screen would look like this:

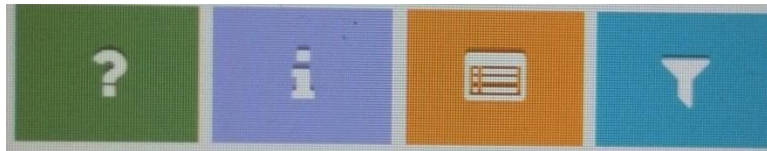


Click on  to enlarge the Navigation Panel.

**TracDat Tabs:**

- Home
- Assessment Unit
  - The Assessment Unit represents all administrative departments, academic support units, General Education, and academic programs
- Assessment Unit Plan
- Mapping
- Reports
- Documents

Above the tabs, you will see four icons:



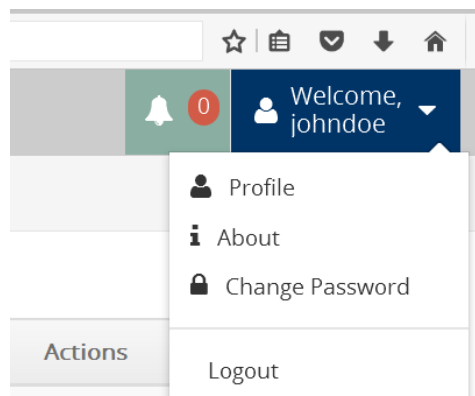
Help [?]  
—Default TracDat help available for the current page

Instructions [i]  
—Customized instructions for Mansfield University

Audit Log  
—Not Used

Filter  
—Can be used when multiple items are shown. If the filter is in use, the icon will have a red border.

You will also notice your login at the top right of the screen. The dropdown menu will access your profile and Change Password. This is also where you logout.



TracDat has developed a tutorial for users that is available at <https://www.iwebfolio.com/public/tutorials?id=209264> (click on End User tab). The tutorial

includes video instructions along with text. You can also access it by clicking on the Instructions [i] icon above the tabs.

## Assessment

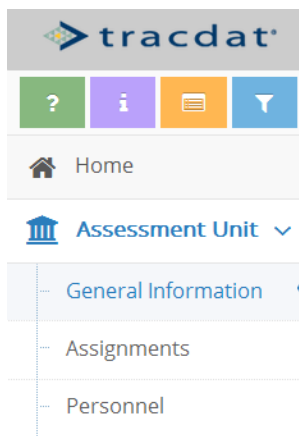
Assessment documents and data from planning cycles can and should be entered into TracDat. Once initial data entry is performed, the process becomes simpler, more secure, and will be more effective in influencing decision making.

### Tab 1: Home

The home page displays an Assessment Plan Summary. All **active** Learning Outcomes are organized in a grid along with a count of the number of Methods of Assessment, Results, Actions Planned/Taken, and Follow-Up. Each item in the grid is a hyperlink that will take you directly to that area in TracDat. At this time, the Home Tab does not include any Sub-Tabs.

### Tab 2: Assessment Unit

The Assessment Unit Tab will feature 3 Sub-Tabs:



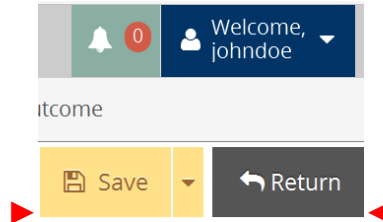
#### General Information

Fields are available to enter the unit's mission statement and an explanation of how it supports the university mission statement, as well as the names and emails for assessment personnel responsible for entering, overseeing, and completing the unit's assessment plan. TracDat has a help guide for *Editing Unit General Information Fields* that provides step by step instructions.

#### Unit Mission in TracDat

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.

- Click on the Assessment Unit Tab.
- Click on the General Information sub-tab.
- Enter (or verify the existing) Unit's mission.
- Click Save.



- Follow the same process to enter (or verify the existing) Unit's values and vision and Save changes if necessary or Return.

## Assignments

View overdue, complete, and incomplete assignments.

Each time an assignment is created for your Unit/Course assessment plans or plan results, it will display in a summary table within the Assignments sub-tab. The Assignments sub-tab acts as a log for each assignment within your Unit.

TracDat has a help guide for the *Assignment Log* and a short video tutorial.

## Personnel

The personnel list includes people who have Unit Administrator access and Reports Only access.

- View/Add/Remove personnel associated with Assessment Unit

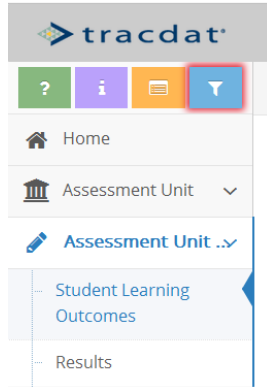
The TracDat administrator handles TracDat assignments. Questions concerning personnel assignments should be directed to the Office of Institutional Research and Assessment Data.

TracDat has a *Unit Level Personnel Table* help guide with step by step instructions and a short video tutorial.

## Tab 3: Assessment Unit Planning

The Assessment Plan tab is where you will enter your Unit's assessment plans, along with your Unit's student learning outcomes and assessment methods. You can relate documents to assessment methods. For step by step instructions, TracDat has a comprehensive video tutorial. TracDat also has a help guide for *Entering an Assessment Plan*.

The Assessment Unit Planning Tab will feature 2 Sub-Tabs:



## View Student Learning Outcomes in TracDat

TracDat users will access an Assessment Unit's Student Learning Outcomes under the Assessment Unit Planning Tab.

- Select the Unit Planning Tab.
- Click on the Student Learning Outcomes Sub-Tab.
- Established Unit Student Learning Outcomes are listed and can be edited, reordered, etc.
  - To reorder student learning outcomes, click on the blue caret next to the student learning outcome and move it to the new location

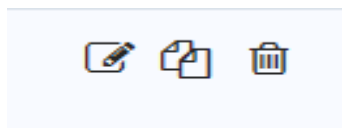


To Add/Modify an Outcome:

- Select Assessment Unit Planning Tab
- Select Student Learning Outcomes Tab
- Select Add New Student Learning Outcome (Green Plus) or Select “edit,” “copy,” or “delete,” next to a current student learning outcome



Icons left to right: Edit      Copy      Delete



After clicking the Add button, users will see the Add New Student Learning Outcome Window.

- Click in the Student Learning Outcome Name field. Enter a Student Learning Outcome Name. The Student Learning Outcome Name should be a one or two word descriptive title.
- Next click in the Student Learning Outcome field and enter the entire Student Learning Outcome.
- Click on the drop down menu to select an Outcome Status and designate the Outcome as Active or Inactive.
- You can opt to leave the Academic Years field blank.
- Leave the Start Data and End Date fields blank.
- Click Save and then click Return.
- Repeat steps to add additional Student Learning Outcomes.

### **Edit Student Learning Outcomes in TracDat**

TracDat users are also able to edit Student Learning Outcomes after entry.

- Click on the Unit Planning Tab.
- Click on the Student Learning Outcomes Sub-Tab.
- To the right of the Student Learning Outcome to be edited, click the “edit” link.
- After the Edit Student Learning Outcome window appears, make adjustments.
- Click Save and then click Return.
- Repeat steps to edit additional Student Learning Outcomes.

***Note: You will follow the same process to post Goals/Action Items from five-year program reviews in the Department unit.***

### **Methods of Assessment in TracDat**

This is the place to specify how you will assess the Student Learning Outcomes with Methods of Assessment. First, select the Student Learning Outcomes for which you will be providing the assessment. Then enter the Method of Assessment information, including the Desired Results to be used to determine if the student learning outcome has been accomplished/met. You can specify more than one Method of Assessment to be used in assessing a student learning outcome, but there should be at least one Method of Assessment for each SLO. Repeat this process for each of your SLOs.

- Click on the Unit Planning Tab.
- Click on Student Learning Outcomes.
- Choose a Student Learning Outcome by clicking on the ► next to the Student Learning Outcome for which you intend to record the Assessment Method.
- Click to Add Assessment Method.

Academic Years: 2015 - 2016  
Start Date: 07/01/2015  
End Date: 06/30/2016

Add Assessment Method

Assessment Methods



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

Save

Return

**Historical Knowledge** Demonstrate factual and conceptual understanding of historical events.

Active ☒

Assessment Method Category

\* Assessment Method

Criterion

Schedule

\* Required field

- The Student Learning Outcome Name and Student Learning Outcome 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. Options for Assessment Method will vary for administrative and academic units. If you need an Assessment Method that is not included on the drop-down menu, please contact the Director of Institutional Research and Assessment Data.

Active ☒

Assessment Method Category

\* Assessment Method

Criterion

Schedule

Capstone Assignment/Project  
Course Assignment  
Exam (Externally Generated)  
Exam (Mansfield Generated)  
Faculty Interview  
Field Placement/Internship  
Portfolio Review  
Survey

\* Required field

- In the Assessment Method field, describe the Assessment Method.



- In the Criterion field, indicate the criterion (target level of achievement for the group being assessed) used 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.
- Click Return.
- Repeat steps to add additional Means of Assessment for this Student Learning Outcome or choose another student learning outcome and repeat.

## Relating Documents to Means of Assessment

TracDat users are able to store all related documents in the TracDat document repository (see page 18). However, specific documents can be related to specific Means of Assessment through the Add Assessment Method window.



Schedule: Summer, 2011 through Spring, 2012  
 Date Added: 06/25/2012  
 Active: Yes

Related Documents	
Assignment	


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

- Survey instrument
- Exam questions
- Essay prompt
- Syllabus
- Assignment directions

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

**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.

- Click on Manage icon . This is used to modify results.
- 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.

The screenshot shows a web interface with a light blue header bar containing the text "Schedule 2010-2011 Academic year." Below this, there are two main sections. The left section, titled "Document Repository" in a green header, shows a tree view with "Program (SLOs) - History (BA)" selected. The right section, titled "Related Documents" in a green header, contains the instruction "Drag documents here to relate".

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

- Choose the folder that contains the Document.
- Click the “relate” link.

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

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

**All Related Documents** will appear in the Edit Assessment Method window. Click Complete when finished.

The screenshot shows a user interface element with a notification bell icon and a red circle with the number '0'. To the right, it says "Welcome, johndoe" with a dropdown arrow. Below this is a green button labeled "Complete".

## Assignment

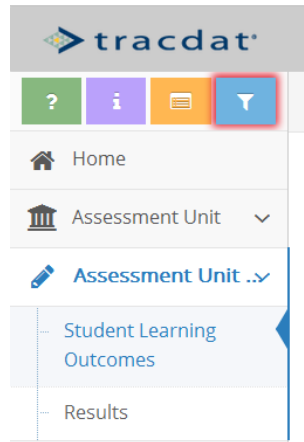
If a specific faculty member is responsible for reporting information for a specific SLO, this is where the assignment is made.

## Assessment Result Data

Assessment results should be updated in TracDat on a scheduled cycle. Submitting new data is easy, and once training is complete and plans established, maintaining result data is unobtrusive to users. Use this area to add new Results and/or to view and edit existing Results related to your SLOs. The Results analysis is an “executive summary” of how you assessed the SLOs, what the actual results were, and whether the Desired Results (also known as Criteria) were met. You can also add Actions taken as a result of the data analysis and Follow-Ups to those Actions in order to demonstrate work toward program improvement. TracDat has a help guide for *Entering Assessment Results* and a short video tutorial.

## Results in TracDat

TracDat users entering data for a unit, program, or department will initially enter all assessment results into TracDat. Thereafter, they will regularly **update assessment results** for each student learning outcome.



- Click on the Results Tab.
- Click on the specific Student Learning Outcome for which you want to add a result.

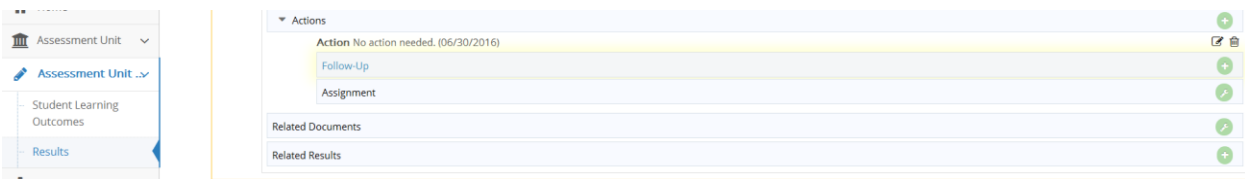
Click the Add icon to add a new Result or click the caret next to the Method of Assessment title to display any existing Results. Repeat this process for each of your SLOs.


### Adding New Results in TracDat

- Choose the Assessment Method in the list that corresponds to the results being entered. Click Add.
- Begin entering results for the chosen student learning outcome and assessment method in the Result field.
- In the Result Date field, enter the date the Result was posted (this usually defaults to the date information was entered).
- In the Reporting Period field, select the academic year from the drop-down menu. **You must indicate the academic year.**
- In the Result Type field, indicate whether or not the specified Criterion for the assessment method was met.
- In the Action Taken field, indicate the next step (Action) for this assessment method.
- The Action Status Update Date will default to the current date and may be changed.
- If you want to relate a document, click on Related Documents.
- Select New Document, Document from Repository, or Previously Related Document.
- Follow process explained on page 9.
- Click Save.

### Creating Action Plans in TracDat

After results have been entered for each student learning outcome 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 for a new result, another option will appear that allows the user to indicate an “Action Taken.”
- On the far right side of the screen beside the Action bar, click Add 
- The Date field will default to the current date and may be changed.
- Describe how the results from this assessment will be used for program improvement and indicate the action to be taken in response to the results.
- Click Save, then 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.

Action No action needed. (06/30/2016)

\* Follow-Up Date

\* Follow-Up

In the Action Taken sub-tab to the left, 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  on the right side of the screen.
- In the Follow-Up field, describe how changes have influenced the program and the future plans for the initiative.
- Click Save
- Click Return

## Relating Documents to Assessment Results

TracDat users are able to store all related documents in the TracDat document repository. 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

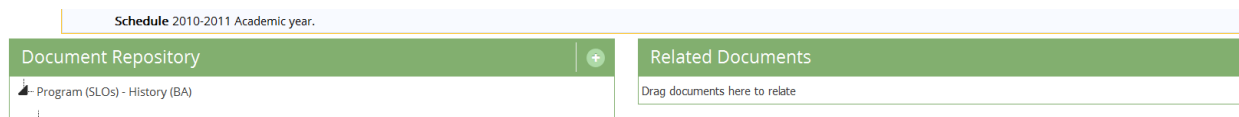
- Rubrics used in scoring
- Examples of student work
- Scoring keys
- Exam questions

To relate documents to assessment results:

- Click the Relate Document link.

**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.

- In the Document Repository, click  to upload a new document.
- 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
- Drag the document from the Documents Repository to Related Documents.



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

- Choose the folder that contains the Document.
- Drag the document from the Documents Repository to Related Documents.


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

- Drag the document from the Document Repository to Related Documents

**All Related Documents** will appear in the Related Documents window.

If you want to un-relate a document, click on the icon to the right of the document

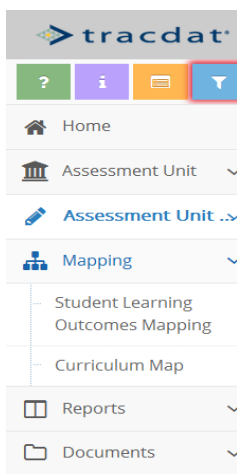
## Editing Results and Action Plans in TracDat

To edit results, dates, result types, action plans, or follow-up plans, users should follow the steps outlined previously in this guide, and, in the appropriate area, click the modify link. 

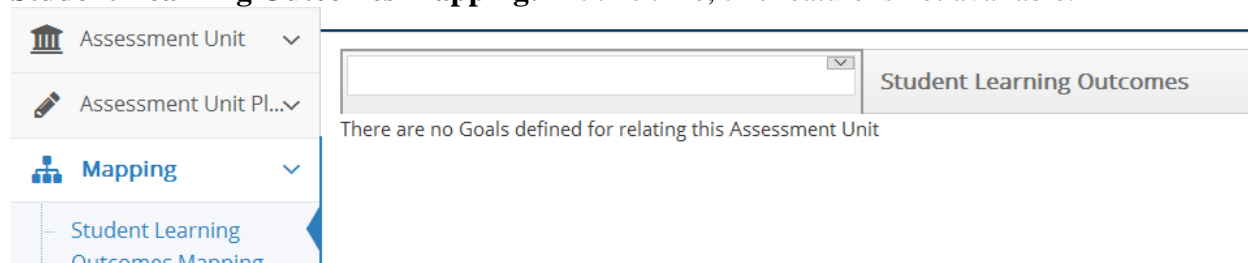
## Tab 4: Mapping

There are two tabs in Mapping:

- Student Learning Outcomes
- Curriculum Map



**Student Learning Outcomes Mapping:** At this time, this feature is not available.



**Curriculum Map:** In the previous version of TracDat, this feature was called **Related Courses in TracDat**.

- Click on the Curriculum Map sub-tab.
- The following screen (with the unit's Student Learning Outcomes and Courses) will appear. The sample below is from the BSED Social Studies: History Education unit.
- Click on the box below each course for which assessment data was collected that academic year.
- A check will appear in the box. Click on the appropriate letter:
  - A (Assessed)
  - I (Introduced)
  - M (Mastery)\*
  - R (Reinforced)

**\*Mastery is available upon request. Contact the IR Director to add this option.**  
You may choose more than one letter.

TracDat has a help guide for *Curriculum Mapping* and a short video tutorial.

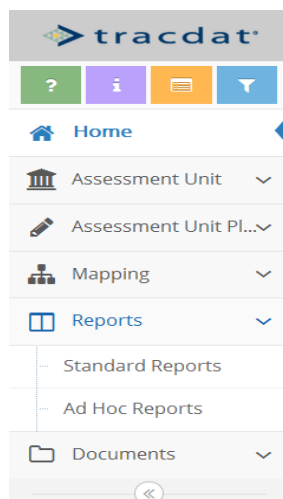
Student Learning Outcome	HST-3272 - American Women's History on Film*	HST-3275 - History of South & Southeast Asia*	HST-3290 - (W)Historical Methods*	HST-3294 - Topics in Amer Hist*	HST-3295 - Topics in Global Hist*	HST-3296 - Topics European Hist*
<b>Historical Knowledge</b> Demonstrate factual and conceptual understanding of historical events.	A   R		A   R		A   R	
<b>Global Historical Knowledge</b> Articulate knowledge of global societies, their historical geographies, and their comparative historical contexts.	A   R		A   R		A   R	
<b>Understanding Social History</b> Reflect an understanding of the roles of race, class, gender, and ethnicity in history.			A   R			
<b>Historical Interpretation</b> Acquire familiarity with the uses and limitations of historical comparison as an analytic tool.			A   R			
<b>Historical Methodology</b> Recognize and demonstrate use of multiple forms of evidence and sources when researching a topic.	A   R		A   R		A   R	
<b>Historical Writing</b> Write clear, well organized, properly documented, and grammatical prose.			A   R			
<b>Student Reflection</b> Demonstrate professional reflection that supports continuing critical and						

- Click Save
- Click Return
- Repeat steps for all Student Learning Outcomes assessed.

## Tab 5: Reports

There are two sub-tabs under Reports:

- Standard Reports
- Ad Hoc Reports



Reports can be generated in either HTML, PDF, or Microsoft Word. For best results, use HTML for viewing and PDF for printing reports. TracDat has help guides for *Creating Unit Level Standard Reports* and *Creating Unit Level Ad Hoc Reports*, along with a short video tutorial.

Initially, users should run reports using the defaulted options to understand the reported results. Once users become more proficient TracDat users, they will decide how to narrow the student learning outcomes and results that are included in the report. Users will be able to create customized meaningful reports for intended audiences.

Assessment Unit Reports	
Assessment: Assessment Unit Four Column	This report shows the Student Learning Outcomes for each selected Assessment Unit, along with any Assessment Methods, Results, and Actions for each Student Learning Outcome. The report is displayed in a four column layout. In addition, any reportable fields from the General Information page display at the top of the report.
Assessment: Assessment Unit Planning	This report shows the Student Learning Outcomes for each selected Assessment Unit, along with any information contained in the Student Learning Outcomes area related to each Student Learning Outcome and any recorded Results. This may include any Mapping for the Student Learning Outcomes you wish to display. The report is displayed in a narrative layout. In addition, any reportable fields from the General Information page display at the top of the report.
Documents List	This report list all documents (files) stored in each folder for each unit.
Course Reports	
Assessment: Course Assessment Plan	This report shows the Course Outcomes for the selected Courses, along with any information contained in the Course Assessment Plan area related to each Course Outcomes. This may include any Mapping for the Course Outcomes you wish to display. The report is displayed in a narrative layout. In addition, any reportable fields from the General Information page display at the top of the report.
Assessment: Course Four Column	This report shows the Course Outcomes for the selected Courses, along with any Assessment Methods, Results, and Actions for each Course Outcome. The report is displayed in a four column layout. In addition, any reportable fields from the General Information page display at the top of the report.
Mapping	
Mapping: Curriculum Map	This report shows the Student Learning Outcomes of the Assessment Unit and how each selected Course is related to each Student Learning Outcome using Curriculum Map. This report can only be run for one Assessment Unit at a time.
Mapping: Curriculum Map Excel	This report shows the Student Learning Outcomes of the Assessment Unit and how each selected Course is related to each Student Learning Outcome using Curriculum Map.

## Assessment Unit Report

The Assessment: Assessment Unit Four Column report provides an overview of the plan and result data for the Assessment Unit.

Open Report

Return

\* Report Title

Assessment: Assessment Unit Four Column

Report Subtitle

Report Logo

Filter

Outcome Status

Academic Years

Assessment Method Categories

Sort Results

☐ Ascending
☒ Descending

Result Date Between

and

Reporting Period

Result Types

Options

Include Student Learning Outcomes With No Results

☒

Include Assessment Methods with no Results

☒

Include inactive Assessment Methods

☐

Include Fields With No Data

☐

Include Program Review Updates

☐

\* Required field

- Click the link for the report.
- In the reporting window, choose the options that will provide the most meaningful results.
- After parameters have been set, you can choose to Open Report, Download as Zip, or Save to Document Repository.



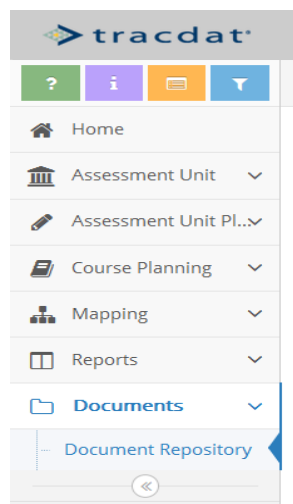
- Open Report, Download as Zip, or Save to Document Repository buttons are at the top right of the screen.
- After clicking Open Report, the report will open in a new window as a PDF file.

## Other TracDat Reports

Other example reports of interest include Assessment: Assessment Unit Planning, Documents List, and Mapping: Curriculum Map.

## Tab 6: Documents

### Document Repository



Document storage is another powerful component of the TracDat assessment management system. Word processing files, spreadsheet files, and scanned images are examples of potential artifacts for the Document Repository. Users should upload any resource they suspect might be of potential assistance in future evaluation and assessment. TracDat has a help guide for *Using your Document Repository*, along with a short video tutorial.

### Uploading New Documents in TracDat

- To add a new document to the TracDat document repository, select the file to which you want to add a document.
- Click the Add button.
- In the resulting 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.

Save Cancel

---

Places documents into

**Files**

Click to browse for files

**Urls**

* Name	* Url	Description
<input type="text" value="..."/>	<input type="text" value="..."/>	<input type="text" value="..."/>

\* Required field

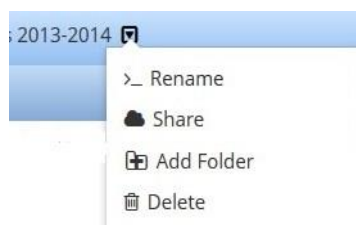
## Organizing Stored Documents in TracDat

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

- Highlight program name.
- Click Add Folder.
- In the resulting Add New Folder window, provide a name for the new folder.



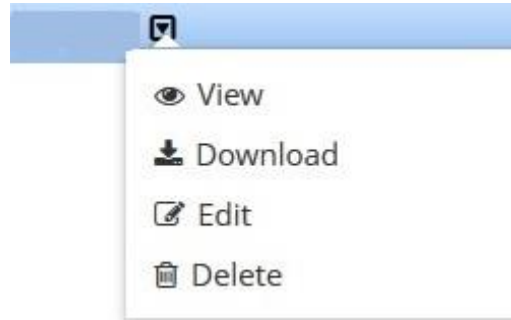
- Move between repository folders using the links with folder icons.
- Rename a folder, share a folder, or delete a folder using the links next to the folder name.



## Viewing Current Documents in TracDat

- To view currently stored documents in TracDat, click on the repository folder.
- Select the document and click the drop-down box to the right of the document.

- In the resulting File Download window, click Open to immediately view the document, or click Save to store the document on your PC or USB drive for future use.



### Editing Documents in TracDat

- To replace a document in the repository with a new version, click the “edit” link in the drop-down box to the right of the document you plan to replace.
- In the resulting Edit Document window, enter the information for the new file.
- Click Save.

### Deleting Stored Documents in TracDat

- To delete an artifact from the document repository, click “delete” in the drop-down menu for the document you plan to remove.
- In the resulting Are you sure you want to delete this document? Window (see below), click OK. If you are not sure, click Cancel. Note: Deleting the document from the repository may result in the document being removed from other areas of the application.



If you have any questions, contact Karen Guenther ([kguenthe@mansfield.edu](mailto:kguenthe@mansfield.edu)).