

TracDat Training Information

Logging in to TracDat:

1. Go to www.IOE.eku.edu
2. Click on the TracDat link
3. Enter Username & Password (if you do not know your Username or Password please contact Michele Goltz at either 2-8562 or Michele.goltz@eku.edu)


Entering Action Plan (Reporting Units)

Reporting Unit – General Information


This is where you will input the Mission Statement, Vision Statement, and Top 5 Accomplishments –
(Note: this is not required by the University)

- To the right of the page you will see box with a pen in it. Select this item to add or edit this information.
- Copy and paste mission and vision statement from plan.
- **SAVE and RETURN**

Reporting Unit Planning – Goals (Optional)

- Select the Reporting Unit Planning tab
- The Plan tab will be the first tab that is below the Reporting Unit Planning tab. This will contain the Goals and Objectives.
- To the right side of the page, select the plus button in the green circle  across from Goals
 - Goal Type: Select goal type from current plan
 - Goal: Copy and paste goal from plan
 - RU Goal Status: Mark active
- **SAVE and RETURN**

Reporting Unit Planning – Objectives (this is in the same area as the Goals)

- Select the Reporting Unit Planning tab
- The Plan tab will be the first tab that is below the Reporting Unit Planning tab. This will contain the Goals and Objectives.
- To the right side of the page select the plus button in the green circle  across from Objectives
 - Objective Name: Enter in an Objective name that is *understandable*
 - Objective: Enter in the description of the objective (this can be copied and pasted from a word document)
 - Objective Status: Click either “Active”, “Inactive” or “Complete”
 - Objective Types: Click on current plan and any other Objective Type (also is this a Planning Objective or Education Objective) (**this is also the area to select the program, a critical thinking or communication objective**)
 - Start and End Date – this is optional and does not have to be used
- **SAVE and RETURN**

Reporting Unit Planning – Means of Assessment

- Select the objective to which the Assessment Method is to be added – to do so select the arrow next to the objective
- You will then see the objective information. Below that you will be able to select from the following: **Assessment Methods**; Tasks; and Related Goals.
- To add an Assessment Method, select the plus button in the green circle across from Assessment Methods.
 - Keep Active checked if this is going to be an active Assessment Method
 - Assessment Method: Enter in how the objective will be assessed (can be copied and pasted from a word document) - (**Required Information**)
 - Criterion: Enter in how this assessment is judged - (**Required Information**)
 - Schedule: How often will this assessment be done – (**Optional Information**)
 - Who will use the data: Enter in who will look and use the information – (**Optional Information**)
- **SAVE and RETURN**

Reporting Unit Planning – Related Goals

- To relate an objective to the University’s and Oversight Group’s goals, select the objective to which the Objective will be related – by selecting the arrow next to the objective.
- You will see the objective information. Below, you will be able to select from the following: Assessment Methods; Tasks; and **Related Goals**.
- To “Relate” to the University’s and Oversight Group’s goals select the wrench in the green circle across from Related Goals.
 - A new screen will come up in the first column with a drop down box and the rest will be your unit’s objectives.
 - If you unit has goals they will be the first to come up and be shown in the drop down box. If not your Oversight group will be listed first.
 - To relate your objective, click on the box that aligns with the objective and goal. Use the bottom scroll to slide the objectives left to see more.
 - Relate to both your Oversight group and the University. **However, save between the two.**
- **SAVE and RETURN**

Make sure to establish links to TracDat:

- Oversight Groups should link their strategic directions to their goals and the strategic direction of EKU.
- Reporting Units should link their objectives to their goals, the strategic directions of their Oversight Group, and the strategic directions of EKU.

Why is it important to link your goals and objectives?



- Establishing links show the contribution of each reporting unit to their Oversight Group’s action plan, and illustrates the contribution of each planning group to EKU’s strategic plan.
- If the links are not established, the unit’s contribution to the University’s and College’s plan might go unnoticed because it will not be part of the annual University Assessment Impact Report.

DO NOT DELETE OLD DATA

If you have any questions contact Michele Goltz at Office of Institutional Effectiveness at 622-8562 or by email michele.goltz@eku.edu. My office is located in Coates 201.

Entering Results

Reporting Unit Planning – Results/Observations

- Select the Reporting Unit Planning tab
- Select Results/Observations
- Click on the objective that you want to add the results/observations to
- The assessment method(s) will be listed below once you select the objective
- To the right side of the page select the plus button in the green circle  across from assessment method you want to report on.
 - **(Note:** Do not select the plus button for “Directly related to Objective”.
 - Enter in the Result/Observation Date (***As a rule of thumb use the last day of the fiscal year. For example for 14-15 data the date to enter in is June 30, 2015. No matter when you are putting in the data.***)
 - Enter in the summary of the results in the Result/Observation box.
 - Result Status: Select either “Results Closed – No further action needed” or “Result Open – Further action needed” (**Note:** select “Results Closed” if your Results/Observation Type is a “Strength”)
 - Result/Observation Type: Strength (met your criterion) or Limitation (did not meet your criterion)
 - Notes are not needed
- **SAVE and RETURN**
- Click on the plus button in the green circle  across from Meaningful Changes of the assessment method you just reported on
 - Enter in the Action Date (***As a rule of thumb use the last day of the fiscal year. For example for 14-15 data the date to enter in is June 30, 2015. No matter when you are putting in the data.***)
 - **Meaningful Changes:** Enter in a summary of what changes are happening, this would include discussions about the changes as a result of the data collected. Most will remember this as “Use of Results.”
- **SAVE and RETURN**