TracDat Training
Senate/Committee/Council

2014

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Committee/Council/Selection

1. Select the “Committee” or “Council” or “Senate” from the drop down menu:

   ![Dropdown Menu Example]

   The list that appears on the drop down will be all of the units that you have access to. Select the appropriate senate/council/committee that you wish to work on.
Home Tab Selection

2. Once selected the “Home” tab is highlighted. From here you can see a summary (from the summary sub-tab) of any assignments, Initiatives and results.

There are several sub-tabs under the selection “Home”. The “Summary” tab displays an overview of any assignments you have as well as a count of the “Initiatives” and “Evaluations” that have been entered. The “Calendar” tab displays a calendar with any assignment due dates and the “Profile” tab will display information about the current user.
Senate/Committee/Council -> General Tab

3. On the “Senate/Committee/Council” tab select the “General” sub-tab and enter the purpose statement and the membership of the organization.

- The “Senate/Committee/Council Name” field is prepopulated with the selected unit from the top drop down field.
- In the “Purpose Statement” field enter the Senate/Committee/Council official purpose or function statement.
- In the “Membership” field enter the members and group they represent.
- “Save Changes”
- “Return”

In addition to the “General” tab there is also a “Personnel” tab that displays all of the personnel that have access to this Senate/Committee/Council.
**Initiative Tab**

4. On the “Initiative” tab select the “Initiatives” sub-tab to review and add initiatives. It is recommended that the first “initiative” be the General Expectations.

On this page you will see all of the initiatives that have been entered. You can also filter on academic year and status by selecting the filter icon in the top right corner.

Note: You can also edit an existing initiative by selecting “Edit” from an initiative from the list. This is how you will bring forward existing initiatives or mark them as “Inactive”. By editing an existing initiative you can add a year to the entry by holding down the “CTL” key and selecting multiple Academic Years.
Adding an Initiative

5. After selecting the “Add initiative” button at the bottom of the page you are presented with the form to add an initiative.

- In the “Initiative Name” field enter a short title of the initiative.
- In the “Initiative” field enter the description of the initiative.
- In the “Academic Years” drop down box enter the academic year that this initiative falls in. If this is a carryover or you want to have this initiative cover several years press the CTL key while selecting multiple years.
- In the “Initiative Status” field select “Active” to make this initiative active.
- In the “Start Date” field select the date when the initiative was entered.
- In the “Inactive Date” field select the date when the initiative will be complete. This will usually be the end of the academic year.
- “Save Changes”
- “Return”
Adding District Objective association

6. Select the “Related Objectives/Goals” sub-tab to select the District Objectives and Show Cause Actionable Plans that the initiatives support.

- Select the initiative from the “Initiative Name” drop down box.
- The “Initiative” field will prepopulate once an “Initiative Name” is selected
- Select (by clicking in the square beside the name) any District Objectives or Show Cause Actionable plans that are supported by this Initiative.
- “Save Changes”
- Repeat for each initiative
- “Return to Initiative”
Results

7. Results page is where we will be adding results for the Beginning of the Year, Mid-Year and End of Year reporting.
8. Once “Add Result” is selected you are presented with all of the initiatives that have been entered. Select the Initiative to add a result.
9. Once you have selected an Initiative to add a result to you are presented with a pop up menu asking you to select what to add the result to. In all cases for this template, select the “Directly related to outcome” drop down.

- Select “Directly related to Outcome from the drop down list
- Select “Continue”
Add a Result

10. The result screen is then presented for you to add a result to.

- Initiative field is prepopulated
- Enter Result into Result field (note: for the beginning of the year report there are no “Results” so enter “Beginning of the Year”)
- Enter the date entered in “Result Date”
- From the drop down menu enter the appropriate selection (note: for the beginning of the year report select “Satisfactory”)
- From the drop down menu “Report Type” enter the appropriate time period of the result.
- “Save Changes”
- “Return”
11. From the “Reports” tab select the “Unit Assessment Report – Four Column”

<table>
<thead>
<tr>
<th>Report</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Assessment Impact by Assessment Methods</td>
<td>This report shows each assessment unit's results and action plans sorted by the various assessment methods. This report is useful for showing results for a unit or across multiple units that use similar assessment methods. (Cascade, Standards, etc.)</td>
</tr>
<tr>
<td>Assessment Impact by Goals</td>
<td>This report displays each of the selected units' goals along with the assessment unit's plan and results that support the goals. This report is useful for showing alignment between the goals and assessment unit's plan and assessment results.</td>
</tr>
<tr>
<td>Assessment Impact by Unit's Objectives</td>
<td>This report shows each assessment unit's plan along with the results and action plans. This report is useful for showing the impact of assessment on the results of an assessment unit.</td>
</tr>
<tr>
<td>Assessment Plan</td>
<td>This report shows each assessment unit's assessment plan. It does not show the results of each assessment. This report is useful for studying each unit's assessment plan.</td>
</tr>
<tr>
<td>Assessment Report</td>
<td>This report shows how each assessment unit is supporting the goals of the institution, meeting unit or an assessment unit. This report is presented in a five-column model.</td>
</tr>
<tr>
<td>Unit Assessment Report - Four Column</td>
<td>This report shows each assessment unit's objectives along with the results and any action plans in a four-column report. This report is useful for showing the results for a specific unit.</td>
</tr>
<tr>
<td>Curriculum Map</td>
<td>This report shows how each course is related to an elective unit's curriculum mapping.</td>
</tr>
<tr>
<td>Objective Relationships</td>
<td>This report shows each of the goals of the selected unit and any objectives at the levels that support those goals.</td>
</tr>
<tr>
<td>Assessment Impact by Tasks</td>
<td>This report shows each assessment unit's results and action plans sorted by the unit's tasks. This report is useful for showing results for a unit or across multiple units that use similar tasks.</td>
</tr>
<tr>
<td>Documents Unit</td>
<td>This report lists all documents being stored in each folder for each unit.</td>
</tr>
</tbody>
</table>
12. Create the report that will be used for submission to the appropriate Senate

- Format: - suggest leaving at PDF
- Layout: - suggest leaving at portrait
- Report Title: - suggest either “Beginning of the year report” or “Mid-Year report” or “End of Year report”
- Initiatives Status: - Select Active
- Academic Years: - Select appropriate Academic year
- Hide Inactive Evaluations: Leave blank
- Assessment Method Category: No selection
- Result Date: - Enter the beginning of the Fall Semester for the first date and the end of the Spring Semester for the second date.
- Sort Results: - Descending
- Results: leave blank
- Reporting Periods: - select appropriate period depending on “Report Title”
- Hide Initiatives with no Results: - Leave Blank
- Hide Evaluations with no Results: - Leave Blank
- Hide Tasks with no Results: - Select
- “Open Report”

Once you have opened the report you can save it and send to the appropriate Senate.
Notes

Beginning of the year processing

The beginning of the year you should enter any new initiatives into the system as well as edit any existing initiatives.

1. An existing initiative can be marked as “inactive” with the associated “inactive date” entered.
2. An existing initiative can be marked as carried forward by selecting an additional “Academic Year” from the edit initiative screen.