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Western Michigan University is committed to the success of our students. That success is predicated on the idea that students graduate from the university having added to the knowledge they had when entering WMU. Assessment of student learning is crucial to ensuring and documenting that students get the added value they should expect from the institution.

Assessment at WMU is an outcome-based process and occurs in both academic and nonacademic units. Units determine the learning outcomes they desire when a student completes either an individual course or program of study or services they provide. Various assessment tools are used to measure the degree to which the outcomes have been achieved. Benchmarks are established for each outcome and the data obtained through various assessment tools is compared to the benchmarks. If the results show that students are not reaching the stated learning outcomes at an acceptable level, the faculty or staff members of the unit make changes in the course/program. Assessment is then used to determine if the changes result in an increased number of students reaching the desired outcome(s).

Assessment plans have been written for all academic units and are in the process of being written by nonacademic units. Since no single educational or operational outcome is common to all units, the plans show the diversity across campus. Different units use various assessment tools as they apply. Assessment plans are not static and can change and evolve as the unit discovers what activities are effective and which are not.

Western Michigan University has chosen to support its goals for assessment of student learning outcomes by utilizing the software, TracDat. In the next few pages, you will be guided through a general process of how to use TracDat to manage your program’s student learning outcomes. TracDat will not only support your ability to record this information, but will also allow you to run reports that will aggregate the data at different levels or track achievement over time.
TracDat Login

Please use Mozilla Firefox or Chrome to access TracDat. The current IE version does not work well with TracDat.

TracDat is a web-based application that can be accessed through any web browser. First, open a browser and enter the following URL: https://itent-tracdat.cc.wmich.edu:8443/tracdat/

Enter your TracDat username and password in the fields as shown in the screen shot below.
After logging in, you will be directed to a page specific to you and the program(s) to which you are assigned. This page will be your Home page and will show you any assignments you have been given as well as provide a brief summary of your program’s assessment status.

Before we start getting into the assessment details, let’s look at the basic Home page navigation in TracDat. Look for and note the following items in the preceding screen shot.
UNDERSTANDING YOUR HOME PAGE

• Starting at the top of the screen next to the “Tracdat” logo is the “Unit” textbox. The unit listed should represent the unit/program or major you are assigned to. If you are responsible for multiple programs, you can use the Smart Search capability to locate the program you are searching for. Single click in the drop-down box, and start typing the name of the program in the search box. It will automatically limit your search down in order to get to the program a little more quickly.

• On the right hand side of the screen next to the Welcome box, is the Notification box. If an assignment has been made to you by your program coordinator, this red icon will have a number appearing in it. Click on the red icon and it will display a brief description of the assignment.

If you hover over the title of the notification, it will give a brief description of what needs to be done.
- If you click on the title of the assessment message it will take you to the assignment page where you can review your assignment in detail and begin supplying the data requested by whoever gave you the assignment. (Note: You would have also received an email notification giving you a detailed explanation of what was being requested.)

• Your Home page will serve as a landing page and provide summary information on your program(s). Since this page also acts as a dashboard, you will be able to click on any of the blue text or numbers, and TracDat will take you to the area that stores that information. This can be a real time saver. You can also use the Navigation Menu to move to the same location as those locations with the active links.

In editing an existing Learning Outcome, you can navigate to its location by using either of the links in the green boxes in the screen shot below. Editing Results would be done by using either of the
links in the blue boxes. Editing course information, IF you are doing course assessment, would be done by using either of the links in the orange boxes. If you are not doing course assessment you will not see a tab for Course Planning.

Your **Home** page also gives you an indication of the progress being made in the learning outcome process. The **green check marks** indicate that all requirements for a learning outcome have been met. This would include having the results recorded and any actions or follow-up that is required. The **red flags** indicate that something is missing. If you hover over any red flags, they will provide an explanation as to why it appears. (Note: The conditions for setting the green check marks and the red flags are set up by your TracDat administrator.)

The difference between the **Navigation Menu** and the **Summary Panel** is that if you want to enter NEW learning outcomes you are required to use the **Navigation Menu**. Once the information has been entered it will then appear on the **Summary Panel**.
The Navigation Menu contains four different color icons. These icons will remain on each of the pages throughout TracDat. Their function, however, will change based on the page you are on at the time.

- The **green icon** is an Instructions/Help icon. Clicking on it will provide an explanation supplied by the vendor of what is present on the page. So this icon is page specific. Here’s an example of the Home page instructions.

- The **purple icon** is tailored to meet institution specific needs. Since various institutions may use their own nomenclature to define their programs and fields, and since some fields are customized specific to a program, this icon will provide you more detailed instructions and is specific to the page you are on.

Below is an example of WMU specific instructions on the Home page. You will see these specific instructions for the Home page displayed automatically at the top of the page in a purple instruction box.

To remove the display from the page, you can either click on the X in the right hand corner of the purple text box, or click the purple icon in the Navigation Menu.
• The **orange icon** is used to view an audit log. This icon will show you if data was deleted, what was deleted and who deleted it. When on this page you can click on the icon to display any add, edit or delete events that appear. Here’s an example of how having deleted an action and finding would look:

![Audit Log Example](image)

The audit log is page specific, so depending on your location in TracDat, the audit log will show you items that were deleted from that page, (outcomes, findings, actions etc.)

• The **blue icon** is the filter icon. It too is page specific, so depending on your location in TracDat, the filter will be different. Perhaps the most useful is the filter that is on the **Plan** page. You must put your cursor in the individual text boxes and click on it in order to display the filters that are available. Since TracDat will store learning outcomes from multiple years, you may want to only filter on those that are active. Here’s an example of how that would be done:

![Filter Icon Example](image)

The information appearing on your Plan screen will then be limited to the filters you have set. If you forget to remove the filter, TracDat will remind you a filter has been used on this page by putting a red box around the **filter icon** at the top of the page.

![Filter Reminder](image)

To remove the filter, just click on the blue **filter icon** and select Clear Filters.
If you try to navigate back to another location without saving your data first, you will get a pop-up reminder.

Just click on Stay on Page, and then click on the yellow Save button at the top of the screen and you’re done.

**NOTE:** When entering data in TracDat, make sure you use the Save button at the top of the page. Do not use your browser’s navigation or back arrows since you may lose data that you intended to save. After saving your data, click on the Return button.
USING THE NAVIGATION MENU

Assessment Unit

Entering Mission and Vision Statements

- **Assessment Unit section:** To add a new mission or vision statement, click on Assessment Unit and then General Information in the Navigation Menu. You will see fields for the mission and vision statement. To edit these, click on the edit icon on the right side of the screen.

- You will see a box where you type in the current mission and vision statement and a field where you can enter the date that your assessment plan was approved by the University Assessment Steering Committee. (Note: This is not a required field.)

Assignments sub-tab

- **Assessment Unit section and the Assignments sub-tab:** This is where you review who has been assigned a responsibility for entering data into TracDat (outcomes, findings etc.) It is not where you enter the assignment itself. The assignment of a responsibility is done in the Assessment Unit Planning section.
**Personnel sub-tab**

- **Assessment Unit section and the Personnel sub-tab:** This is where you review who has been assigned a role in TracDat for the selected assessment unit. You should review this tab at the beginning of each academic year to make sure the list is up to date. You will not be able to update the list. The assignment of roles is done by your TracDat administrator. Contact your TracDat administrator to make changes.
USING THE NAVIGATION MENU
Assessment Unit Planning Section

Entering and Editing Your Learning Outcomes

- **Assessment Unit Planning section and the Plan sub-tab:** This is where the majority of your work will be done. You enter any new Learning Outcomes, Assessment Methods, Findings, Actions and Follow-Ups in this section. New entries are made by using the green plus icon. Editing existing entries is done using the edit icon.

Adding a New Learning Outcome

While still on the **Assessment Unit Planning section and the Plan sub-tab:**

- After clicking the plus icon, you will be presented with this screen.

  - Enter a short title for the Outcome Name (for example, 1.0 Content Knowledge).
  - Under Outcome, enter a more detailed description of that outcome (for example, Candidates in all
programs within the department will demonstrate mastery of the content necessary for professional performance.)

- Choose the Outcome Status of Active.
- Next, choose the track. (Some units may not be using the tracks but if your assessment unit was set up as a department and not a program, the tracks represent the different programs within the department/unit. For example, a track may be Undergraduate Major, Undergraduate Minor etc. It could be that you look at one outcome in all programs but maybe it is only going to be looked at in the Undergraduate Major. By labeling the outcome with a track, you can run a report based on the track and only see only those outcomes associated with a particular major, minor, etc.)
- The Start Date should be the date you started to measure the outcome. The End Date is entered only when the outcome is no longer applicable to your unit. It can usually be left blank.
- When finished, be sure to click the gold/yellow Save button at the top of the page.

Once an outcome has been created and saved, it will appear under the Outcomes section of the Plan sub-tab. You will then be able to access the outcome by using either the Navigation Menu or the Summary Panel.

Note: DO NOT DELETE your learning outcomes. If you do, you will delete the results, the use of the results and any other information associated with the outcome. Instead, set the Outcome Status to Inactive, and enter the End date so the outcome will not display in your reports.

Copying a Learning Outcome from One Major/Program to Another Major/Program

While still on the Assessment Unit Planning section and the Plan sub-tab:

If you have a learning outcome that will be used across several different majors/programs, TracDat will allow you to copy it and move it without having to re-create it in the new major/program.

- Click on the Copy icon on the right hand side of the screen:
On the following screen, you have the option of selecting which elements of the outcome will be copied over to the new major/program. If you will be using the same assessment method, click the first checkbox. You may want to click on the related courses checkbox but if applicable. Do not click the Tasks checkbox. Click on the Related Goals checkbox if applicable:

Next, from the selection box on the left side of the screen, select the new assessment unit/major you want to copy the learning outcome to:
• Next, click on the Save button on the right side of the screen. Once it has been saved, click on Return.
• You have copied the learning outcome and selected elements to the new major/program.

Re-arranging the Order of Outcomes on a Page

You can easily re-arrange the order of your learning outcomes. To do so, just hover over the target icon alongside the name of the outcome. The icon with four directional arrows will appear, and a pop-up box saying Outcome will appear:

Now, just hold down your left mouse button, and drag the learning outcome so that it appears in the list in the order you want.

Filtering

While on the Assessment Unit Planning/Plan tab

You may want to view a sub-set of your outcomes, such as seeing only the active outcomes.

• Click on the blue filter icon in the Navigation Menu. You will be presented with a screen that looks like this:
The Goal Filter Section:

- The Goal Filter section allows you to limit your display to a specific goal type for your program or unit. Select the Goal Type you want to limit your display to.
- You can also select to show Active or Inactive Goals.

The Outcome Filter Section:

- This section will allow you to limit your display to the Active, Complete or Inactive outcomes, and/or select the track associated with the outcome.
- Once you’ve selected the filter, click on the grey “X” in the upper right hand section of the filter screen to exit out of it:

The Assessment Method Categories Filter Section:

- You can also choose to filter the Assessment Method categories.
After the filters have been applied, the blue filter icon in the Navigation Menu will be outlined in red:

- To **remove filters**, click on the blue icon circled in red.
- To clear all the filters, click on the Clear Filters buttons in the section where the filter was applied:

- To **edit filters**, click on the blue icon circled in red.
- Click on the grey “X” in the section of the filter screen that contains the filter you want to edit:
Click on the blank filter box and re-select your filter.
  - Click on the grey “X” in the upper right hand corner of the filter section to exit out after you’ve made the preferred changes.

Adding Assessment Methods
Next, we are going to work on entering Assessment Methods. These are the methods that will be used to gauge the students’ success at achieving each of the learning outcomes.
While still under the Assessment Unit Planning/Plan sub-tab
  - First, click on the triangle appearing alongside the outcome to expand the display.
  - Then, click on the plus sign to add a new assessment method.

• You will be presented with this screen:
If you have multiple learning outcomes, confirm that you have selected the learning outcome you want to work on.

- Next, choose the assessment method category used to measure student achievement of the learning outcome. This can be an exam, a project, an oral presentation, etc.
- Under Assessment Method, enter a more specific description. For example, you might enter “Final exam question in CHE 205” or “Oral presentation of semester project in ENTR 302.”
- Next enter the criterion (target or threshold) that your program expects students to achieve (75% of students will receive a “B” grade or better).
- Be sure to click the Save Changes button at the top of the page.

Please note: It is best practice for each outcome statement to have 2 assessment methods but, it is not required.

Adding a Related Document

While still under the Assessment Unit Planning section on the Plan sub-tab:

- First, click on the triangle appearing alongside the outcome name, then alongside the Assessment Method being used. You will be presented with the screen below.
- Click on the green icon that looks like a wrench on the far right side of the row.
You will then be presented with the following screen. You have the opportunity to associate any documents that support the findings by clicking on the green wrench icon at the end of the row. However, any associated documents must already be in the Document Repository. This can be done from here or from the Navigation Menu under the Documents link. Once the document is uploaded to the Document Repository, you can associate it with a Finding. Refer to the Documents section of these materials for instructions on how to do the uploading of documents.
Assigning an Outcome to Another Person in Your Program/Unit
This is not something that needs to be set up now, but is a nice feature when you are ready to do assessment. This page will allow you to assign this assessment method, or responsibility for the entire outcome, to someone else in your program/unit. The assignee will be asked to provide assessment data/information through an email message.

While still in the **Assessment Unit Planning section on the Plan sub-tab:**
- Make sure the **triangle** has been clicked to expand the assessment method you will be using.
- Click on the **green icon** that looks like a wrench on the far right side of the row.
You will then be presented with the following screen. Click in the “Assign To” box and a list of available personnel will be displayed. If the name of the person that is to have responsibility for completing the assignment isn’t present, contact your TracDat administrator.

<table>
<thead>
<tr>
<th>* Assign To</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Due Date</td>
<td>08/30/2016</td>
</tr>
<tr>
<td>Subject</td>
<td>Assignment from TracDat</td>
</tr>
</tbody>
</table>
| Notes/Instructions | Assessment Method Category: Exam-Licensure  
Assessment Method: State Mandated test of content proficiency.  
Criterion: At least 80 percent of program completers will meet proficiency scores as established by the state of Michigan.  
Repeats | Once |
| Provide | Related Document, Finding and Actions |
| Put Documents In | Assignee(s) may choose Repository Folder |
| E-mail Assignment to Assignee(s) |  |
| Send CC to Person Assigning |  |

- Select the instructor/staff you are assigning this activity to.
- Enter the due date the information needs to be completed.
- Enter the subject of your email in the Subject box.
- Enter the instructions to the recipient in the Notes/Instructions box.
- Generally, the Repeats box is left at Once unless you want a more frequent entry of the information.
- Give the recipient the type of information you are expecting to be returned: Related Documents (data), Finding and Actions, Related Documents (data) and Findings, or Related Documents (data) only.
- Then, select the location the documents should be stored in.
- Next, click the Email assignment to Assignee(s) checkbox; if you want a copy of the email to be sent to you, click that checkbox as well.
- Return to the top of the screen and select Save.

After completing the assignment, the information will appear on your Assignments section of the Assessment Unit tab. This is where you can monitor the status of the assignments you have made.
### Assessment Unit: Assignments:

<table>
<thead>
<tr>
<th>Send Checked</th>
<th>Status</th>
<th>Due</th>
<th>Assignment</th>
<th>Assignee</th>
<th>Email Last Sent</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>In Progress</td>
<td>04/04/2016</td>
<td><strong>Outcome:</strong> Assessment Method:</td>
<td>Karen Stokes Chapo</td>
<td>04/04/2016</td>
</tr>
<tr>
<td></td>
<td>Open</td>
<td>06/05/2016</td>
<td><strong>Outcome:</strong> Assessment Method:</td>
<td>Karen Stokes Chapo</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Open</td>
<td>08/22/2016</td>
<td><strong>Outcome:</strong> Assessment Method:</td>
<td>Karen Stokes Chapo</td>
<td></td>
</tr>
</tbody>
</table>
Manual Entry of Assessment Results Directly Related to Outcomes

While still in the Assessment Unit Planning section select the Findings sub-tab:

There are two types of Findings. The first one appearing on the list is a result that is Directly Related to Outcome. It is rarely used. Generally, it is used to enter a finding related to an outcome that isn’t related to ANY of the assessment methods relevant to your findings. These kinds of findings are generally summary in nature.

- To record this type of general summary statement, Click on the green plus icon on the end of the row

![](image)

- You will be presented with a screen that looks like this:

![](image)

- Enter your brief summary statement/data in the Findings box
- Enter the Finding Status academic year date from the dropdown
- Record your Finding Type information (Criterion Met, Criterion Not Met, Other)
- Record your any other information you would like to capture in the notes box
Once you have recorded your **Directly Related to Outcome** statement, it will appear on the **Findings** page with a grey **triangle** alongside it. By clicking on the **triangle** you will expand the results and you will have the opportunity to edit it, or to enter any **Actions** you took as a result of the finding.

- To edit it, click on the pencil icon
- To record an Action, click on the **green plus** icon, and you will be presented with the following page:

  ![Image of the findings page with a green plus icon for recording actions.]

  - Enter your planned Action in using your findings and click the yellow Save button at the top of the screen.

You also have the opportunity to associate any documents that support the findings by clicking on the **green icon** at the end of the **Related Documents** row. **Note:** Any documents you upload must be done from the **Navigation Menu** under the **Documents** link. Once the document is uploaded to the **Document Repository**, you can associate it with a Result here. Refer to the Documents section of these materials for instructions on how to do the uploading of documents.

If you have already uploaded the document to the **Document Repository**, click on the **green icon** that looks like a wrench to the far right of the row:
You will be presented with the following screen.

- Drag the document from the folder location in the **Document Repository**, over to the Related Documents.
- Click Complete at the top of the page.
Manual Entry of Assessment Findings Related to an Assessment Method

- To add results that are related to an assessment method, select which outcome you would like to enter results for by clicking on the plus icon on the far right side of the screen.

- You will be presented with a screen like this:

- After entering your findings, click on the yellow Save button at the top of the screen.
- Your results will then appear on the Results tab, and there will be a grey icon with a number inside it that will tell you the number of results recorded for the selected outcome.
Creating an Action Plan

Assessment Unit Planning section on the Findings sub-tab:

If the desired target for a learning outcome was not met, or if your outcome didn’t collect the information you expected to get, an Action Plan can be entered.

- First, you will need to click on the triangle alongside your outcome with results. Once you can see the results, there will be a section below the results that will allow you to click on the green plus icon to the right hand side of the screen.

- Enter your Action Date
- Enter your Action statement in the second text box
• Click the yellow Save button at the top of the screen.
• Once an Action has been entered, it will appear in the results section, and it will allow you to edit it, establish a date for any Follow-Up that will be needed, as well as to assign any needed actions to another individual by clicking on the green icons alongside these items.

Relate Documents to Findings

**Assessment Unit Planning Section on the Findings sub-tab:**

• You can also Relate Documents to a Finding. You can attach a copy of the assignment, a sample of student work, or an Excel file with the complete distribution of grades, for example.
• Click on the green icon that looks like a wrench to the far right side of Related Documents.
You will be presented with this screen:

Note: Any documents you upload can be done from here or from the Navigation Menu under the Documents link. Refer to the Documents section of these materials for instructions on how to do the uploading of documents.
Adding Follow-up for the Action Plan

*Note:* The Follow-up field will only appear after you have entered an Action for closing the loop in an assessment tool.

**Assessment Unit Planning section on the Findings sub-tab:**

- Click on the triangle alongside the outcome that already has a result entered.
- Then click on the triangle alongside the assessment tool that was used to assess the outcome.
- Click on the triangle alongside Actions
- Click on the plus sign to the far right of the screen. This will open the Follow-up entry screen.

- Add the follow-up data including any intended date for the completion of the action plan.
- Click on Save at the top right hand side of the screen.
- Click on Return at the top right hand side of the screen.
Reports

While on the Reports tab:

After you have entered all your learning outcomes and your assessment methods, you may wish to verify that all of the information was entered correctly by running a report.

- On the Navigation Menu, click on Reports to expand the display.
- Click on Standard Reports

You will then be presented with this screen:
Report Definitions

Assessment Unit Reports

- **Assessment: Assessment Unit Planning** – This report shows the learning outcomes for each selected unit/department/program along with any information contained in the Assessment Unit Planning area related to each learning outcome and any recorded Findings. This may include any Mapping for the 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.

- **Assessment: Assessment Unit Four Column** - This report shows the learning outcomes for each selected unit/department/program, along with any Assessment Methods, Findings, and Actions for each 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.

Running Assessment Unit Reports

While on the **Reports tab, Standard Reports sub-tab**

<table>
<thead>
<tr>
<th>Program Reports</th>
</tr>
</thead>
<tbody>
<tr>
<td>Assessment: Assessment Unit Planning</td>
</tr>
<tr>
<td>Assessment: Program Assessment</td>
</tr>
<tr>
<td>Assessment: Program Four Column</td>
</tr>
<tr>
<td>Summary: Course Outcomes by Program</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Course Reports</th>
</tr>
</thead>
<tbody>
<tr>
<td>Assessment: Course Four Column</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Mapping</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mapping: Curriculum Mapping</td>
</tr>
</tbody>
</table>

This report shows the Learning Outcomes for each selected Program, along with any information contained in the Program Assessment area related to each Learning Outcome and any recorded Results. This may include any Mapping for the 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.

This report shows the Learning Outcomes for each selected Program, along with any information contained in the Program Assessment area related to each Learning Outcome. This may include any Mapping for the 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.

This report shows the Learning Outcomes for each selected Program, along with any performance measures, Results, and Actions for each 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.

This report shows a quantitative summary of Course Outcome data, specifically counts and percentages of Programs and Courses that have Course Planning data. The data shown on the report depends on the Programs, Courses, and various parameters selected. The report is broken into three areas: Overall Summary - shows counts for all Programs selected; Summary by Programs - shows counts for each Program selected; and Program Details - shows specific breakdown for each Program selected.

This report shows the Course Outcomes for the selected Courses, along with any Performance Measures, 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.

This report shows the Learning Outcomes of the Program and how each selected Course is related to each Learning Outcome using Curriculum Mapping. This report can only be run for one Program at a time.
• Click on the name of the report you want to run

• In the **Report Layout** section:
  o Select how you would like to have the report results returned: PDF, HTML, or Word.
  o You can rename the Report Title to anything you like. Or, you can leave the title as is, and enter a Report Subtitle in the box below it if you like.
  o If you have a program logo you would like to use in your reports, you can select it from the Report Logo drop down box. If one has not been loaded for you, contact Karen Stokes Chapo (karen.stokeschapo@wmich.edu) to have one uploaded for you.

![Image of tracdat interface]

• In the **Filter** section:
  o Place your cursor in the Outcome Status box and click to select Active, Complete, or Inactive. Generally, you will want to run a report on Active learning outcomes.

![Image of filter section]

• Place your cursor in the Tracks box and click to select the track if applicable.
If you want to report on a specific Assessment Method Category, place your cursor in the Assessment Method Categories box and select the assessment you would like to report on. Otherwise, leave this option blank.

- Select the Finding Date Between box. (Optional)
- Select the Finding Status Year. (This is useful when doing historic reports).
- Select the Finding Type: Criterion Met, Not Met, or Other.

• In the Options section:
  - All of these are optional, but it is generally best to leave the two check boxes as is, in order to return a full set of data.
  - Click Open Report from the top of the screen.

There are more reports available and some that are hidden, but for now, we are trying to keep this simple. Contact Karen Stokes Chapo (karen.stokeschapo@wmich.edu) if there is another type of report that you need.
**DOCUMENTS**

*While on the Documents tab, Document Repository sub-tab:*

The Document Repository is where you can upload and store documents related to your assessment and results. You can associate these documents within your unit/department/program, or across larger units. There is no limit to the number, size, or type of the supporting data you can upload.

When uploading documents related to your assessment work, try to be as descriptive and complete as possible. The description text will not show on the final report, but it will help your program stay organized in TracDat as the information grows over time. When running reports in TracDat, the filenames become clickable hot links to those documents, and an explanatory text will make things more clear to people reading the reports.

When you open the Document Repository link, you will be presented with the following screen.

- You will see folders that have been added by users in your unit/department/program as well as a Western Michigan University folder. The Western Michigan University folder is where this training manual is stored so it can be shared across all the TracDat programs. You will be able to download it from here but you will not be able to upload documents to this folder.
- When you open the Document Repository, all of your folders will appear.
• Practice storing a document in one of your folders.
• Click on the **green plus icon** to the far right hand side of the screen.

![Image of Document Repository](image)

• You will be presented with the following screen but your folder names will be listed in the Places documents into box:

![Image of Document Repository](image)

• To view the list of folders, click on the arrow to the right of this field to display the list. From here you can select the folder you want to store the document in.
• In the Files box, click to browse to the location where the supporting documentation is stored.
• Double click on the file and it will be pulled in to the Name field on the screen. Create a clear description of the file in the Description box.
Click on the yellow Save button at the top of the screen.

Now that you have uploaded a document to the repository, it will appear on the original Document Repository screen similar to this:

After it is appearing in the Repository, you will be able to View, Download, Edit, Delete, or Send the document to someone. (Note: Both the View and Download will function the same for PDF files. If you have uploaded another file type, such as .xlsx, Word, etc., you would have been able to view the document on line and the download would have functioned purely as a download.)
### QUICK REFERENCE GUIDE

#### Frequently Used Icons and Their Meaning

<table>
<thead>
<tr>
<th>Icon</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="checkmark.png" alt="Checkmark" /></td>
<td>These appear most frequently on your program “Home” page and are used to indicate all requirements for completing an assessment have been met. Requirements for completion are defined by the assessment coordinator.</td>
</tr>
<tr>
<td><img src="flag.png" alt="Flag" /></td>
<td>These appear most frequently on your program “Home” page alongside a numbered item. It indicates there is action that needs to be taken in order to complete the requirements that have been defined by the program. You can hover over the flag and it will display the explanation as to what is needed in order to complete the requirements for meeting the outcome.</td>
</tr>
<tr>
<td><img src="plus_sign.png" alt="Plus Sign" /></td>
<td>These appear throughout TracDat. Whenever you want to add a Learning Outcome or a Result, clicking on the plus sign will allow you to add the information.</td>
</tr>
<tr>
<td><img src="question_mark.png" alt="Question Mark" /></td>
<td>This icon appears alongside a large number of fields and is used to provide you with pre-defined help suggestions. These suggestions were set up by the vendor and may not provide the detailed explanation you are looking for.</td>
</tr>
<tr>
<td><img src="play_button.png" alt="Play Button" /></td>
<td>This icon is used to expand the display and is found throughout TracDat.</td>
</tr>
<tr>
<td><img src="shuffle.png" alt="Shuffle" /></td>
<td>This icon is used when you want to re-arrange the order of information appearing on the screen. Hover over the icon, then click and drag it to place it in the order on the page you want.</td>
</tr>
<tr>
<td><img src="edit-copy-delete.png" alt="Edit, Copy, Delete Icons" /></td>
<td>In the order as they appear here, the edit, copy and delete icons.</td>
</tr>
<tr>
<td><img src="upload.png" alt="Upload" /></td>
<td>This icon is used as a way to allow you to upload documentation to your repository and appears in the Results section after having entered your findings for the learning outcome.</td>
</tr>
<tr>
<td><img src="count.png" alt="Count" /></td>
<td>This icon is used to provide you with a count on the number of results that have been entered for a learning outcome.</td>
</tr>
</tbody>
</table>