TracDat Key Performance Indicators Data Input

Non-Academic Units
Step-By-Step Guide

Revised December 6, 2013

Hampton University
Hampton, VA 23668

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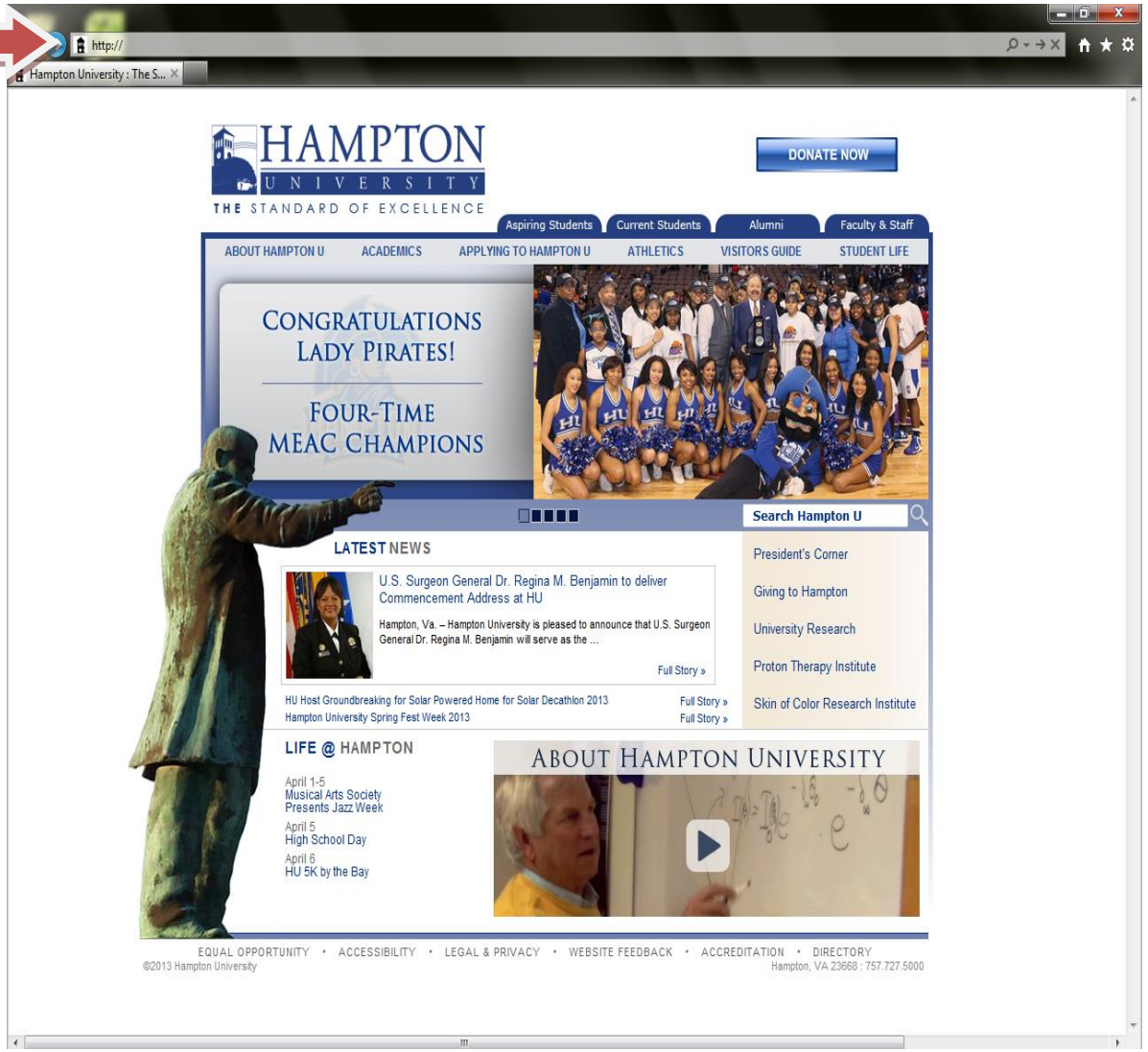
Log in to the TracDat System

1. Go to Mozilla Firefox.
2. Type http://tracdat.hamptonu.edu/tracdat in web browser.
3. Hit your **Enter** key.



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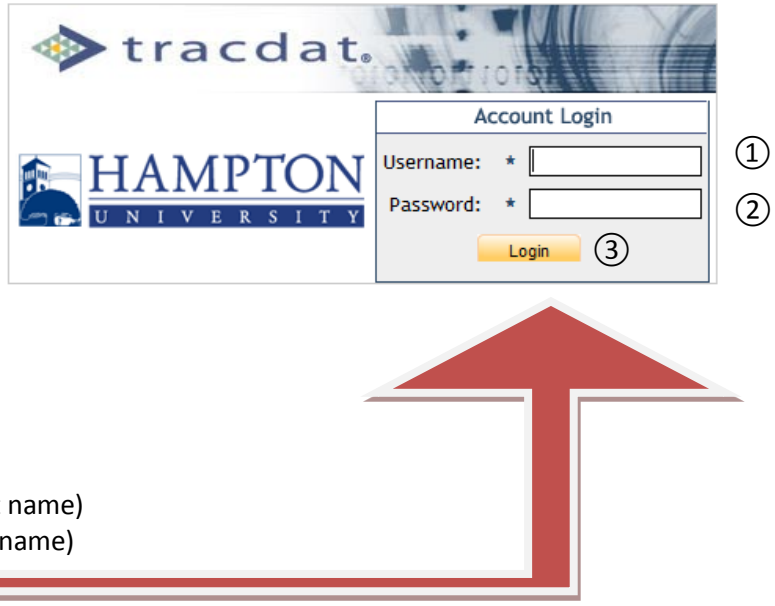

1. Enter your **Username**. (first name.last name)
2. Enter your **Password.** (first initial last name)
3. Click **Login** button.

(Note: Do not use spaces between names.)

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KEY PERFORMANCE INDICATORS

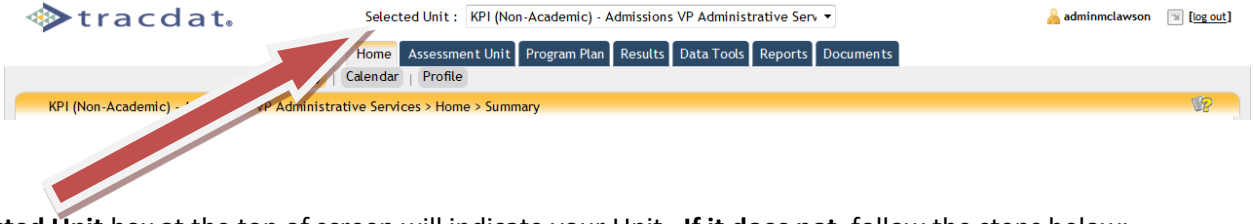
Key Performance Indicators (KPIs) are "an assessment of an organization's performance that is measurable and includes:

- Productivity
- Effectiveness
- Quality
- Timeliness"

At Hampton University, KPIs are measured twice a year and data are entered into the TracDat data management system. The labels with corresponding definition used in TracDat are below:

Assessment Unit – the unit entering data
Key Performance Indicators– identifies a measurable action, such as "to increase"
KPI Type – Unit Specific KPIs to report data
Key Performance Indicator – The area where units will place information regarding the indicators used to measure the overall KPI (recommend numbering the indicators to link to the overall KPI)
Outcome Type – Ensure that the "Key Performance Indicator" is highlighted for all entries
Assessment Method – Information regarding how the indicator will be measured
Target – Specific measure of your target, such as "15% increase"
Assigning Tasks – Assignment of tasks to personnel to place reports in a repository folder
Tasks – Area where you may define tasks, if you desire
Results – Area where results are entered twice a year
Result Type –Area where you identify whether or not you met your criterion
Action Plan – Area where you identify an action plan if you criterion was not met
Related Documents – Area where you may attach documents to provide evidence or your entries

Selecting Unit



The **Selected Unit** box at the top of screen will indicate your Unit. **If it does not**, follow the steps below:

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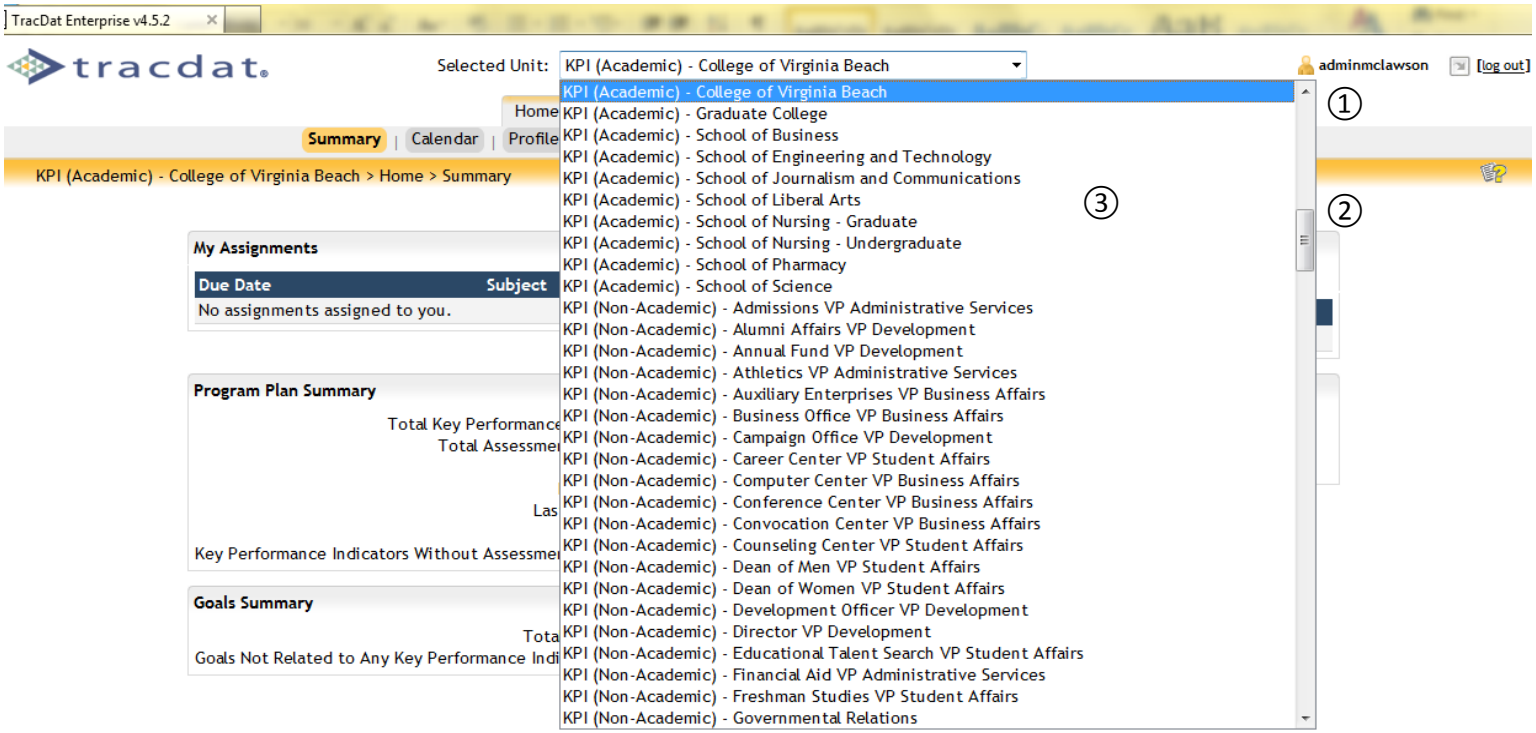
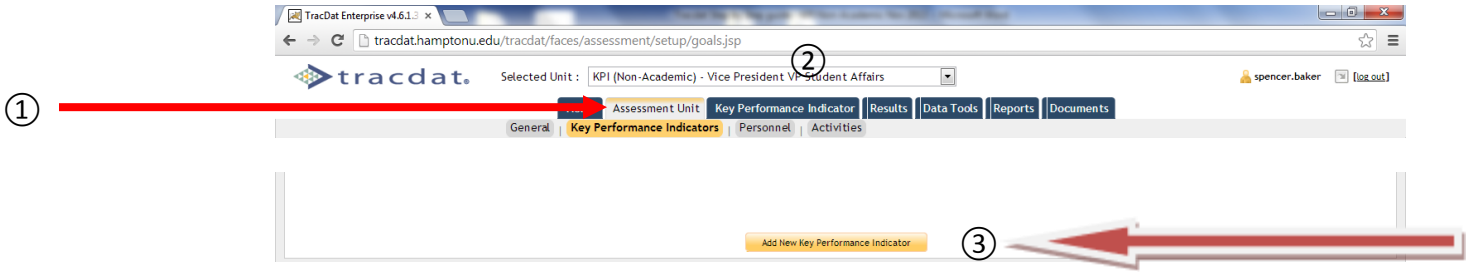
1. Use the source drop-down to select your Unit from the **Selected Unit** at the top of the screen. (Make sure your selection has KPI in front of name.)
2. Use scroll bar to find your Unit.
3. Once you have found your Unit, **click** on your selection.

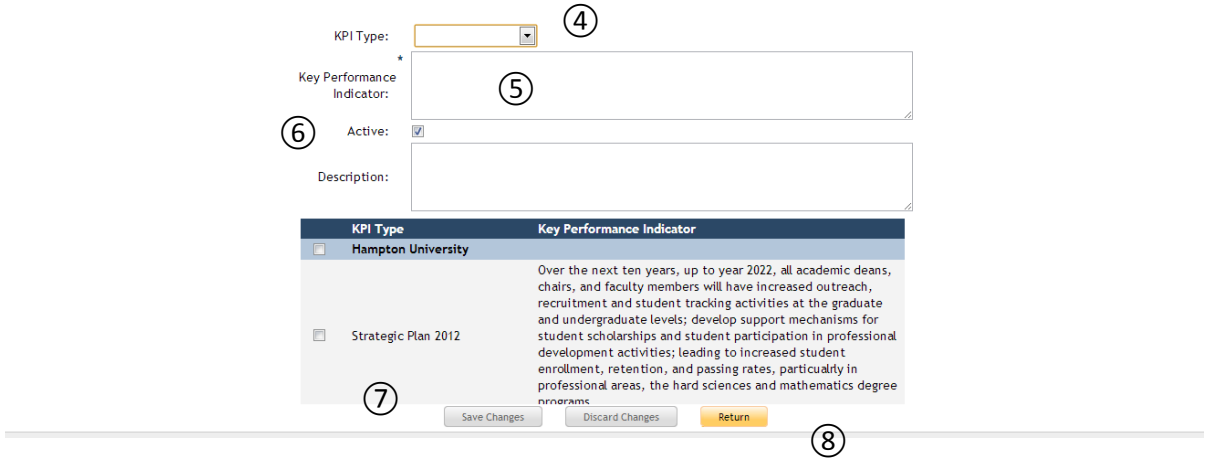


Adding New KPIs



To add a KPI:

1. Click on Assessment Unit.
2. Click on Key Performance Indicators.
3. Select Add New Key Performance Indicator tab in the lower center frame.

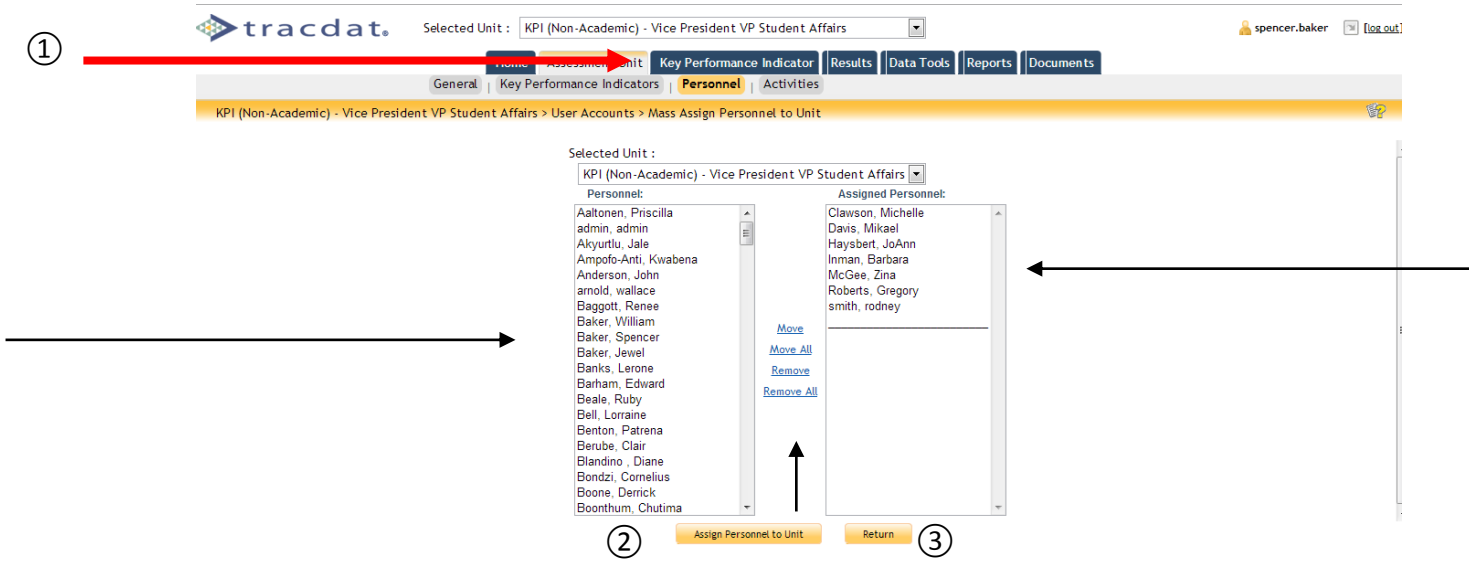


4. Please choose from drop down the **KPI Type.**
5. Type first KPI.
6. Check box if KPI is active.
7. **Save Changes** at the bottom of the screen.
8. Click on Return to go back to the previous window.
9. There is no need to link your KPI to the Unit goals.

Assigning Personnel

To assign a personnel to complete a task:

1. Click on Personnel tab (beside Key Performance Indicator tab).
2. Click on Assign Personnel To Unit tab in the lower center.



After assigning personnel:

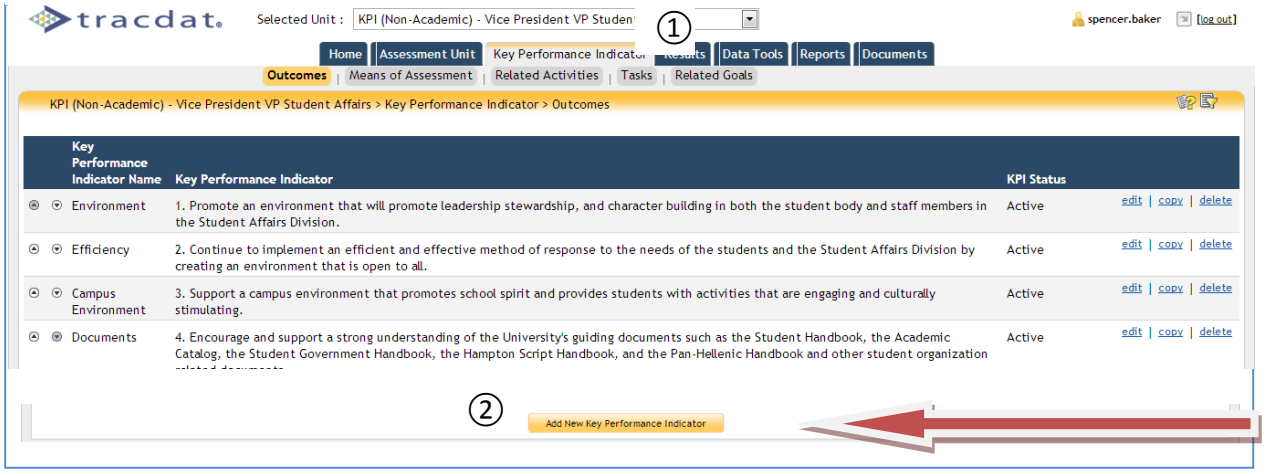
3. Click on **Return** button to return to the previous window.

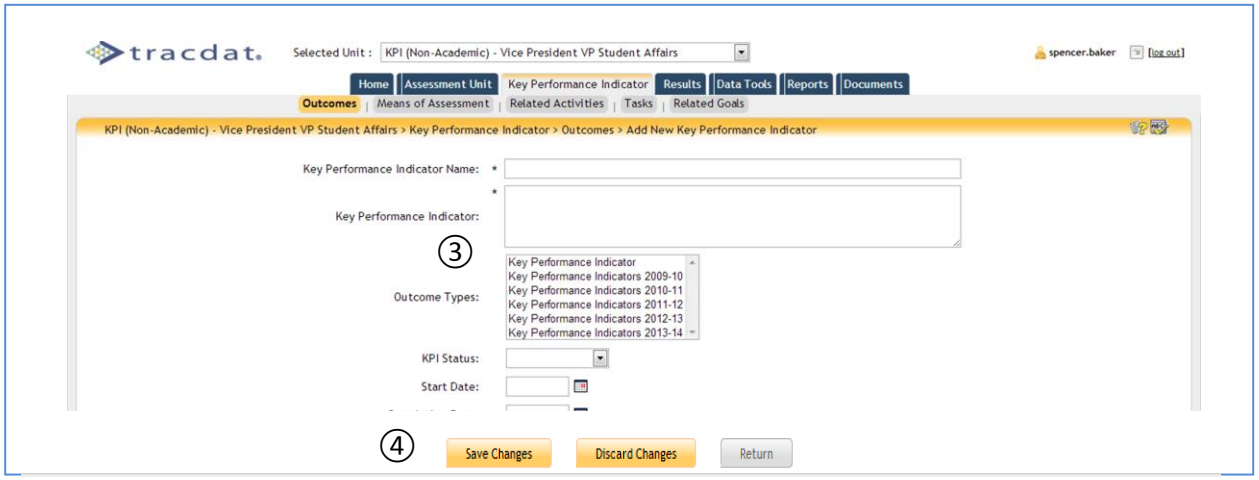
This will allow you the opportunity to send reminders of due dates, tasks to be completed, and other important information. Note: Personnel can only be assigned if they are already in TracDat system. Please contact Mrs. Michelle Clawson or Dr. Spencer Baker if you need someone to be placed into TracDat.

Add/Modify KPIs

To add or modify Objectives:

1. Select the **Key Performance Indicator** tab.
2. Select **Add New Key Performance Indicator** or Select **Edit, Copy,** or **Delete** next to a current Objective.
3. Make changes. Highlight **Key Performance Indicator** in Outcomes Type Box.
4. Select **Save Changes** button after editing.



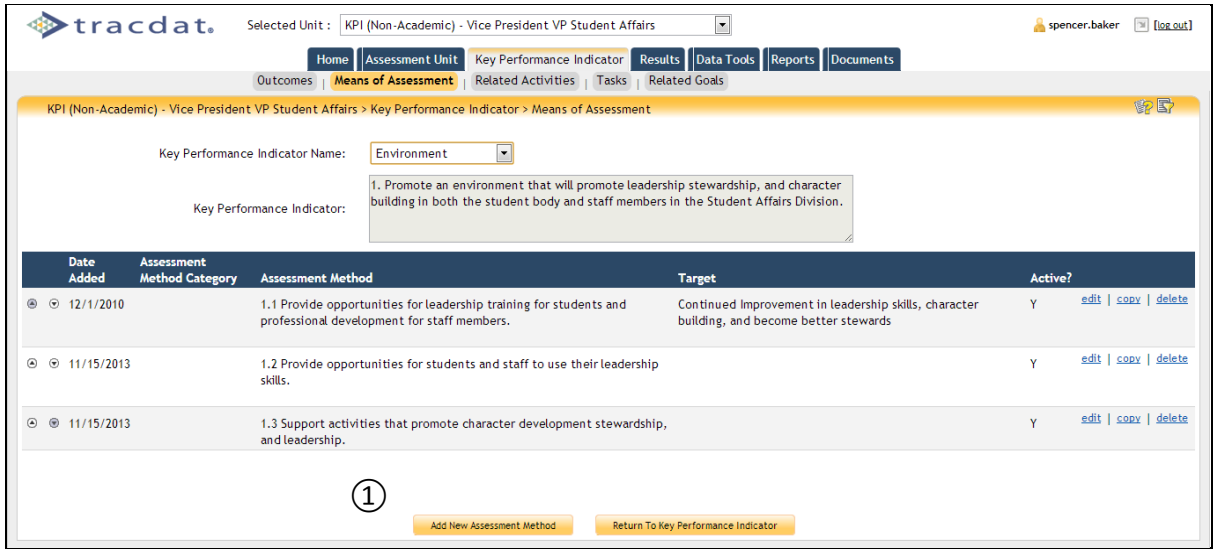


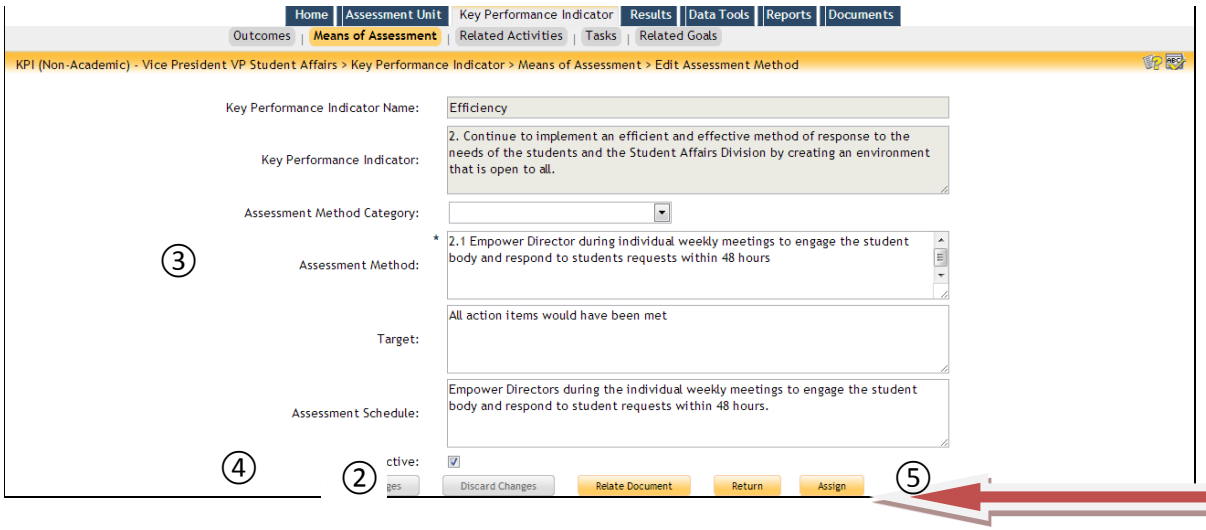
Selecting **edit** or **Add New Key Performance Indicator** will bring up a screen similar to the one below.

Add/Modify Means of Assessment

To add or modify Measure of Assessment related to each Objective Name:

1. Select the **Means of Assessment** Subheading.
2. Select **Add New Assessment Method** or Select **Edit, Copy,** or **Delete** next to a current Assessment Method Category or select KPI from the drop down box next to Key Performance Indicator Name.
3. Make changes or complete all corresponding boxes with appropriate information. You may relate documents to this KPI.
4. Select **Save Changes** button after editing.



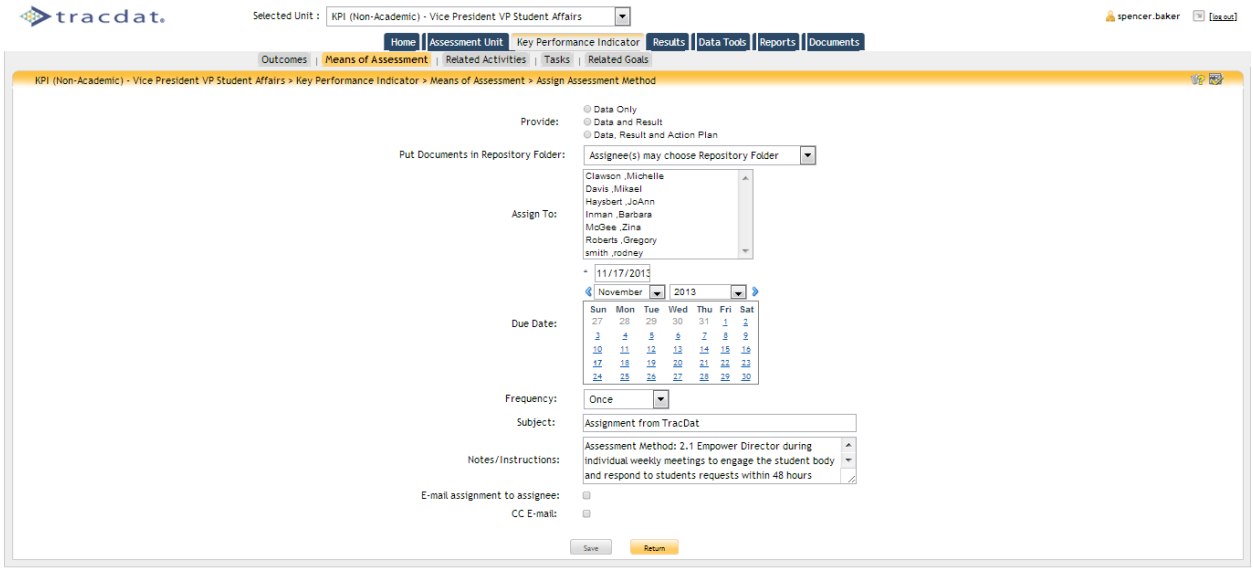


Selecting **edit** or **Add New Assessment Method** will bring up a screen similar to the one to the left.

Assigning Tasks

To may collect data from personnel assigned:

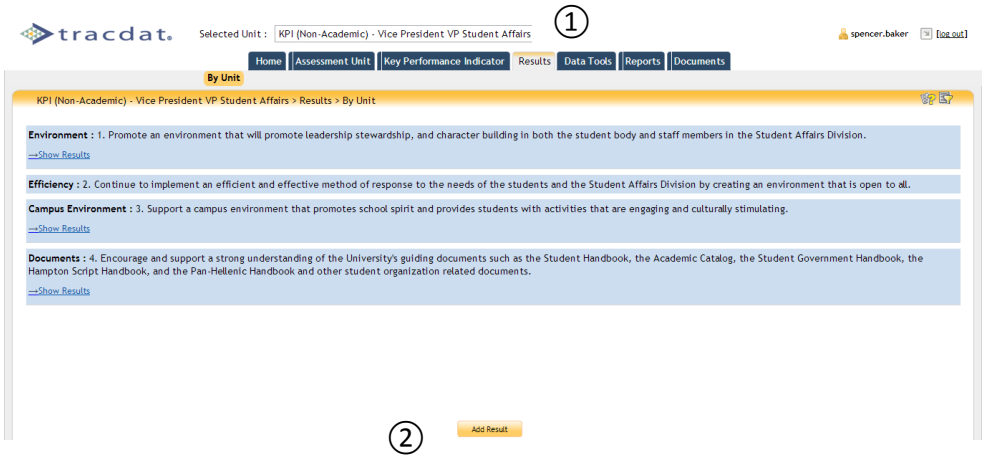
5. Select the **Assign** button. Identify what you want provided in the assigned person's report.
6. Assigned person may place the material in a repository folder for your collection in TracDat.
7. You may establish a due date using the Calendar in Due Date area.
8. You can identify if you want TracDat to email the request to the assign person(s) and can send yourself a CC email to let you know the email went out.
9. Select **Return** button after editing.

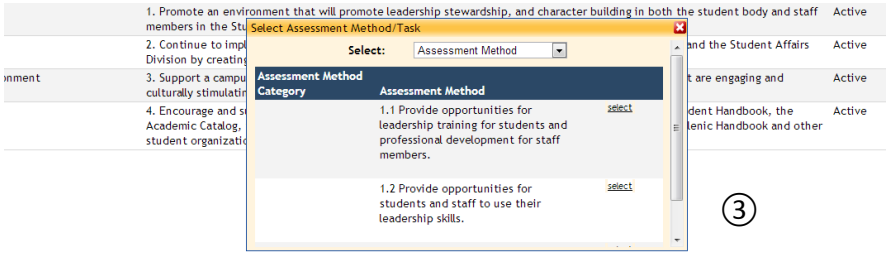


Adding Results

To add results:

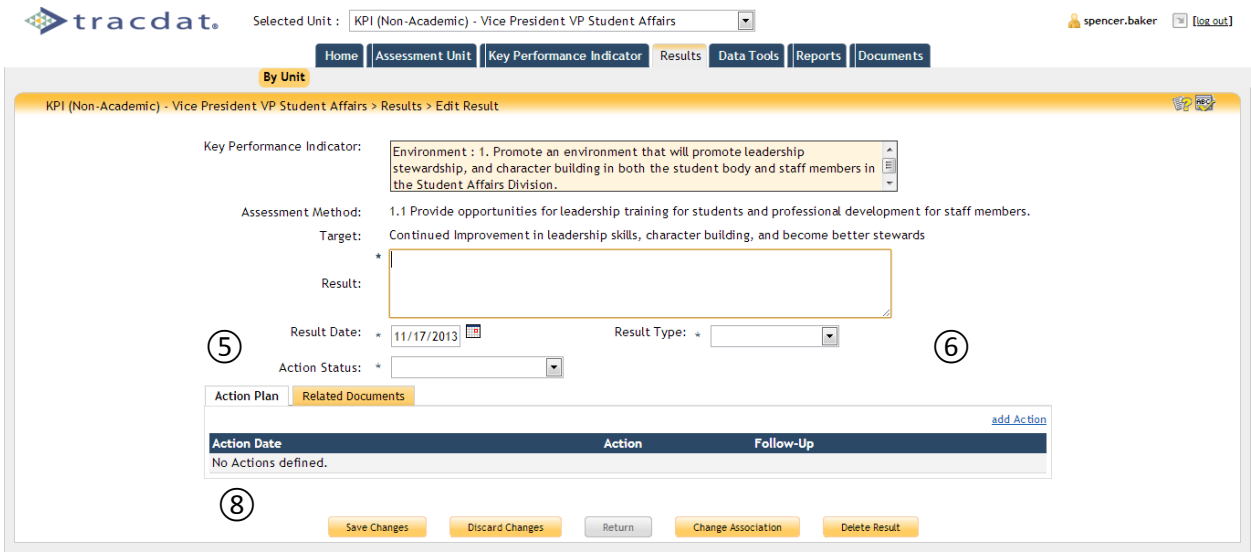
1. Click **Results** tab. All your KPIs will appear. If you want to see your previous results, click on *Show Results*.
2. Click on **Add Results** tab at the bottom of the screen.
3. Click on Select (located on the right of the KPI).
4. Add your results into the appropriate field.





To add results (continued):

5. Click on the drop down box for Action Status and indicate whether or not an action plan is established.
5. Use the Result Type drop down box to indicate whether or not your criterion was met.
6. If your criterion was not met, an action plan must be established. You can relate documents (evidence of your results or action plan) below the Action Status drop down box.
7. Click Save Changes
8. Hit the Return button.



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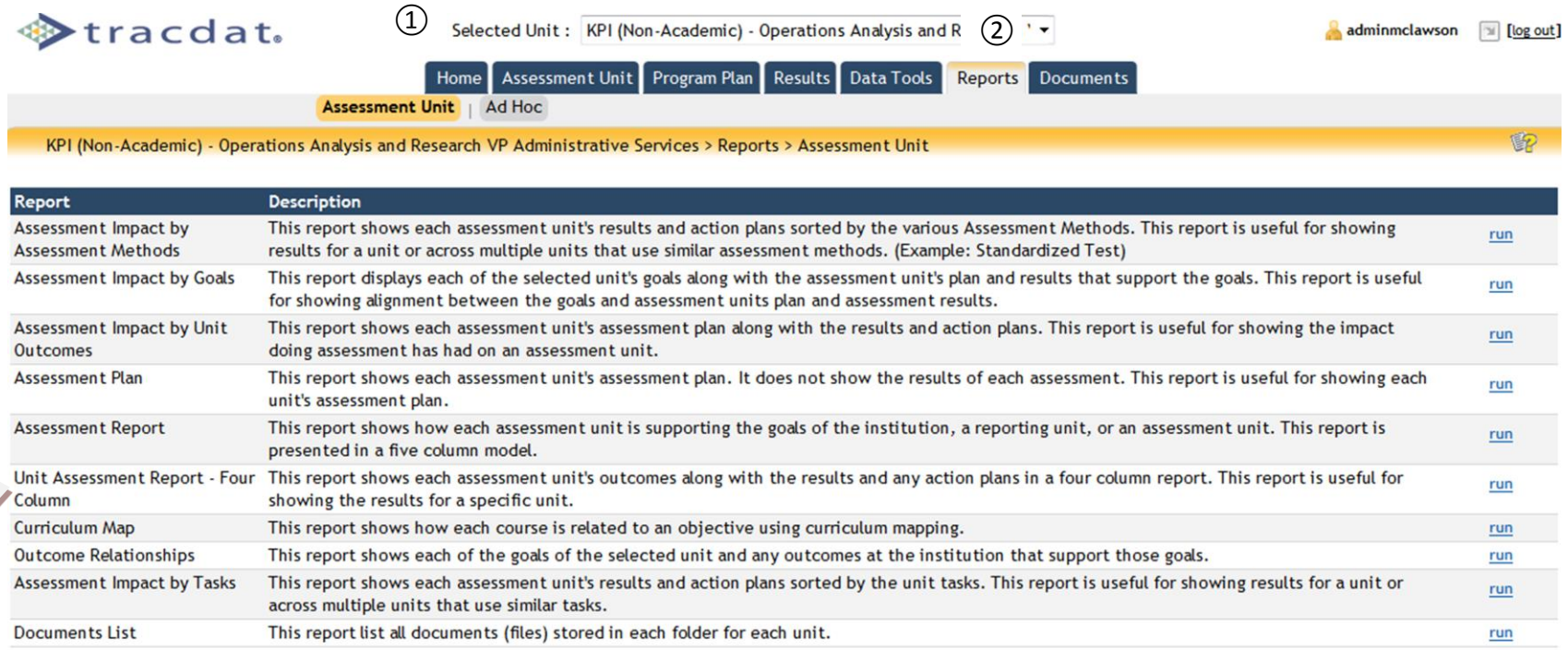
Reports

To run an Unit Assessment Report – Four Column:

1. Data for report is related to the Selected Unit from the top drop-down menu.
2. Select the **Reports** tab.
3. Locate **Unit Assessment Report** row and select **Run**.



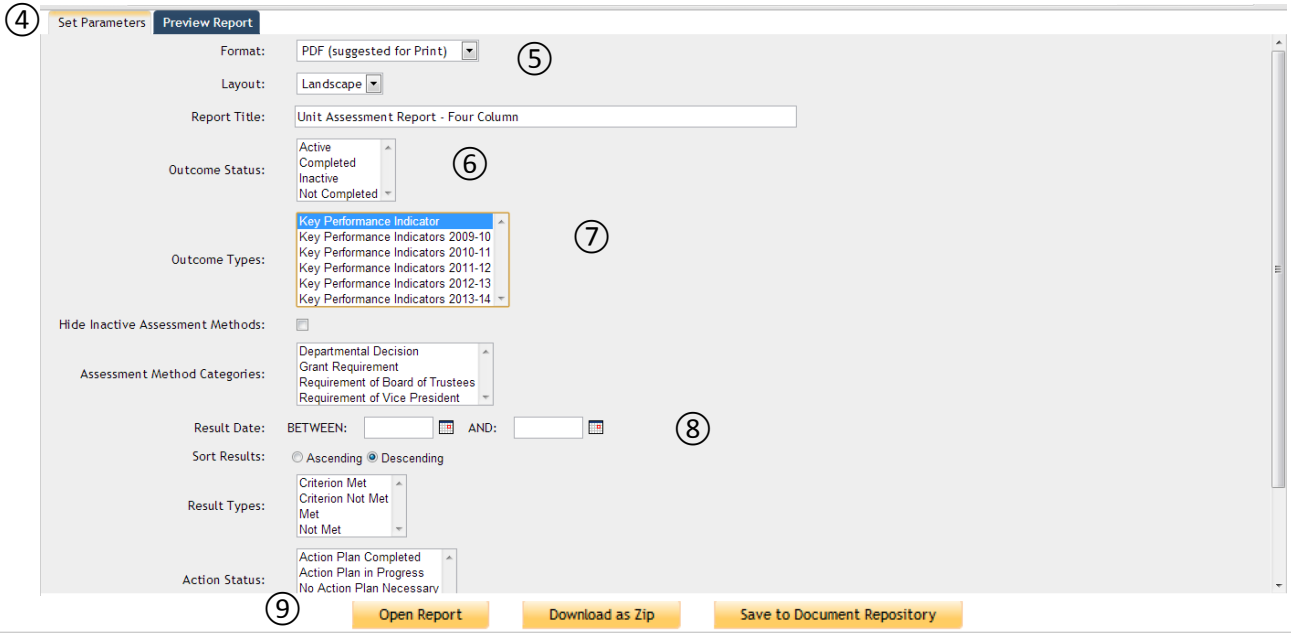
Report	Description	
Assessment Impact by Assessment Methods	This report shows each assessment unit's results and action plans sorted by the various Assessment Methods. This report is useful for showing results for a unit or across multiple units that use similar assessment methods. (Example: Standardized Test)	run
Assessment Impact by Goals	This report displays each of the selected unit's 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 units plan and assessment results.	run
Assessment Impact by Unit Outcomes	This report shows each assessment unit's assessment plan along with the results and action plans. This report is useful for showing the impact doing assessment has had on an assessment unit.	run
Assessment Plan	This report shows each assessment unit's assessment plan. It does not show the results of each assessment. This report is useful for showing each unit's assessment plan.	run
Assessment Report	This report shows how each assessment unit is supporting the goals of the institution, a reporting unit, or an assessment unit. This report is presented in a five column model.	run
Unit Assessment Report - Four Column	This report shows each assessment unit's outcomes 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.	run
Curriculum Map	This report shows how each course is related to an objective using curriculum mapping.	run
Outcome Relationships	This report shows each of the goals of the selected unit and any outcomes at the institution that support those goals.	run
Assessment Impact by Tasks	This report shows each assessment unit's results and action plans sorted by the unit tasks. This report is useful for showing results for a unit or across multiple units that use similar tasks.	run
Documents List	This report list all documents (files) stored in each folder for each unit.	run

Reports

Running the Unit Assessment Report continues:

- Reports can be executed in either HTML or PDF.
  For best results, use HTML format for viewing and PDF format for printing report. Also, it is recommended to use Landscape layout.

4. Select **Set Parameters** tab.
5. Select **Format** to use for report (PDF, HTML, or Microsoft Word (.rtf).
6. Under **Outcome Status** select Active items or do not highlight and display all items.
7. Under **Outcome Types**, select "Key Performance Indicator".
8. You can select the dates of the report if you want to display a specific period.
9. Select **Open Report** button.



Reports

Running the Unit Assessment Report continues:

10. Report opens.
11. Report may be printed or saved to a file on your computer.
12. To close report, select **X** on **TracDat Report Viewer** tab.
13. You may log out of TracDat at this time.

See sample report below.

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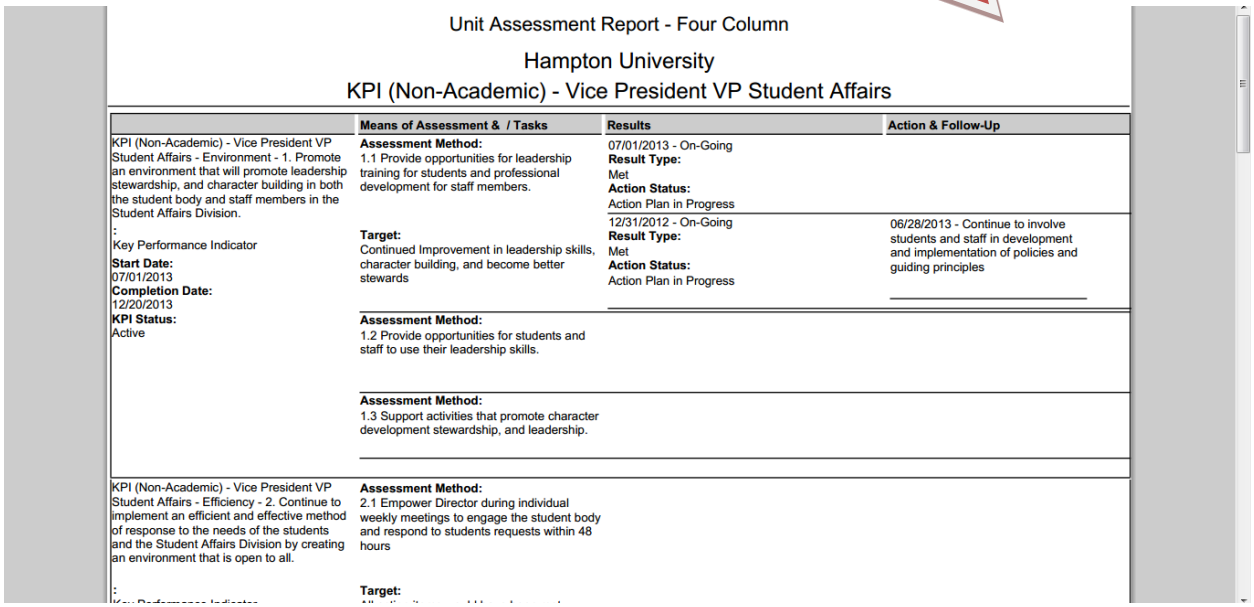

Unit Assessment Report - Four Column

Hampton University

KPI (Non-Academic) - Vice President VP Student Affairs

	Means of Assessment & / Tasks	Results	Action & Follow-Up
KPI (Non-Academic) - Vice President VP Student Affairs - Environment - 1. Promote an environment that will promote leadership stewardship, and character building in both the student body and staff members in the Student Affairs Division. : Key Performance Indicator **Start Date:** 07/01/2013 **Completion Date:** 12/20/2013 **KPI Status:** Active	**Assessment Method:** 1.1 Provide opportunities for leadership training for students and professional development for staff members. **Target:** Continued Improvement in leadership skills, character building, and become better stewards	07/01/2013 - On-Going **Result Type:** Met **Action Status:** Action Plan in Progress 12/31/2012 - On-Going **Result Type:** Met **Action Status:** Action Plan in Progress	06/28/2013 - Continue to involve students and staff in development and implementation of policies and guiding principles
	Assessment Method: 1.2 Provide opportunities for students and staff to use their leadership skills.		
	Assessment Method: 1.3 Support activities that promote character development stewardship, and leadership.		
KPI (Non-Academic) - Vice President VP Student Affairs - Efficiency - 2. Continue to implement an efficient and effective method of response to the needs of the students and the Student Affairs Division by creating an environment that is open to all. :	**Assessment Method:** 2.1 Empower Director during individual weekly meetings to engage the student body and respond to students requests within 48 hours **Target:**		

Acknowledgement: Vice President of Student Affairs for allowing program use.

tracdat

Need additional help?

Contact:
Michelle Clawson
Director of Institutional Research
Extension 5977

Hampton University
Hampton, VA 23668

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