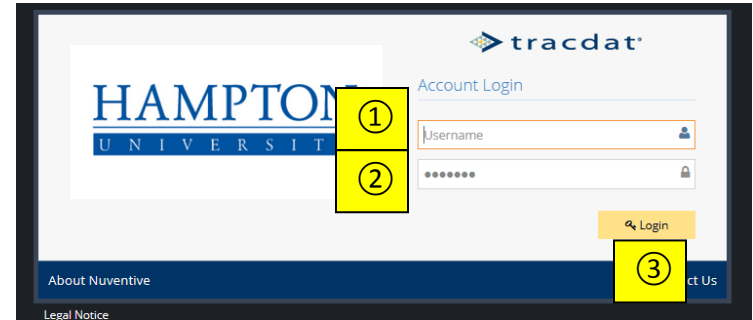


# TracDat Results Update Instructions

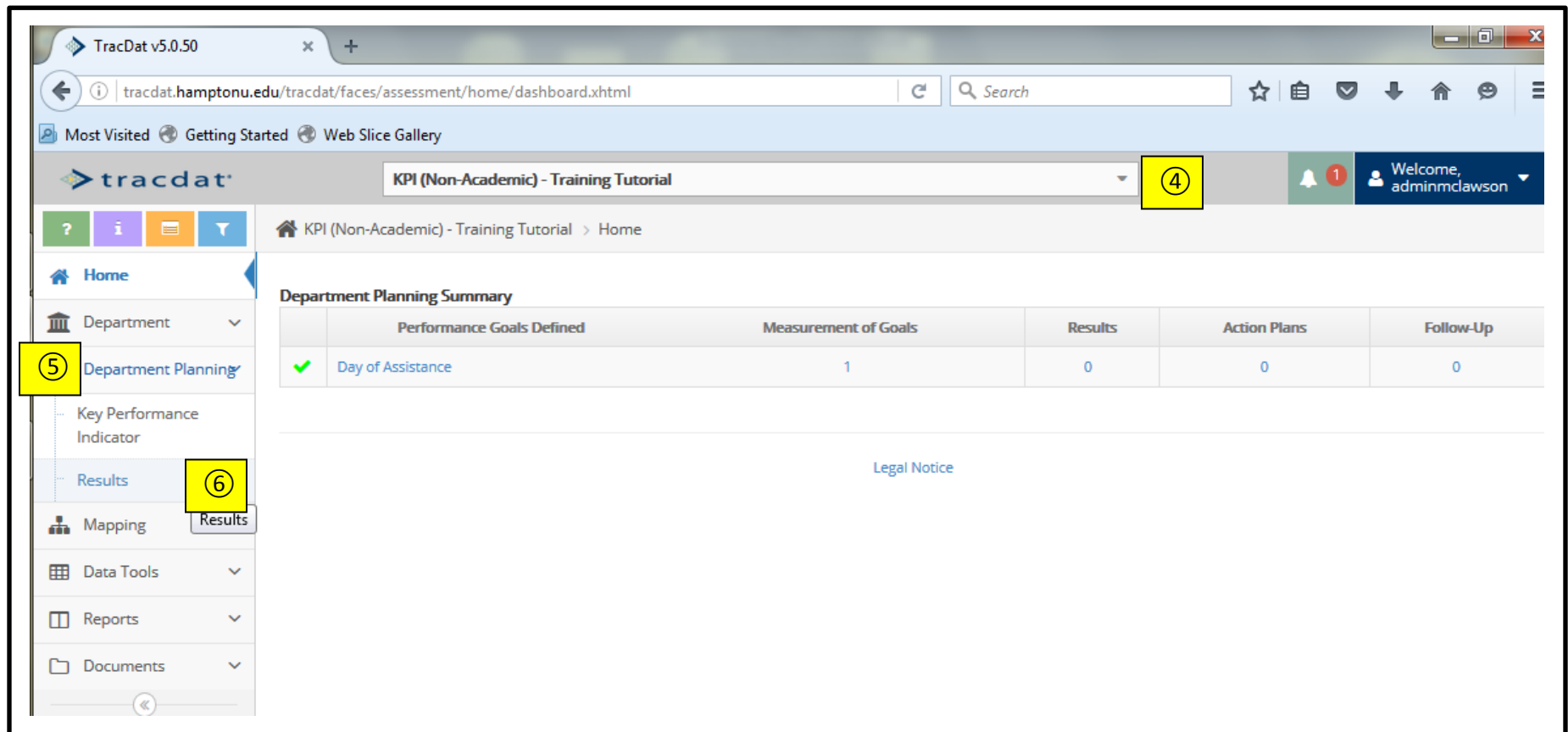
## To Login to the TracDat System:

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



## To get to Performance Goal or KPI:

4. Select your department from the drop down at the top of the screen.
5. Click the **Department Planning** tab from the left-hand navigation pane.
6. Click the **Results** sub-tab.



## To add Result Information:

7. Select an arrow ► to add a result for a specific **Performance Goal (or KPI)**.
8. Click the green button with white plus sign (+) to add data.

The screenshot displays the TracDat v5.0.50 web application interface. The browser address bar shows the URL: `tracdat.hamptonu.edu/tracdat/faces/assessment/unit_planning/observations.xhtml`. The page title is "KPI (Non-Academic) - Training Tutorial". The user is logged in as "adminmclawson".

The main content area shows a list of performance goals under the heading "KPI (Non-Academic) - Training Tutorial > Department Planning > Results". The list includes:

- **7** Training Train 82 employees by June 30, 2015
- **Day of Assistance** A day will be set aside to assist employees with TracDat.
- ◉ **Directly related to Objective** (+)
- **Requirement of Vice President** Count number in attendance and number of that enter KPIs. (+)
- ☰ **Open Session** (+)

The number "7" in the first item and the plus sign in the third item are highlighted with yellow circles. A yellow circle with the number "8" is positioned to the right of the third item, indicating the step to click the plus sign to add data.

At the bottom of the page, there is a "Legal Notice" link.

## To add Result Information:

9. Type Result date or keep default date.
10. Type Result data. Please make sure information is measurable (i.e. We trained 62 Units or 75.6% of the departments. Trainer visited 6 offices, and received 22 emails for assistance.)
11. Select Action Status by using drop down arrow.
12. Select Result Type by using drop down arrow.
13. Save.

The screenshot displays the TracDat v5.0.50 web application interface. The browser address bar shows the URL: `tracdat.hamptonu.edu/tracdat/faces/assessment/unit_planning/observations/editObservation.xhtml`. The page title is "KPI (Non-Academic) - Training Tutorial". The user is logged in as "adminmclawson".

The breadcrumb trail indicates the current location: `KPI (Non-Academic) - Training Tutorial > Department Planning > Results > Add Result`. The left sidebar contains navigation options: Home, Department, Department Planning, Key Performance Indicator, Results, Mapping, Data Tools, Reports, and Documents.

The main content area shows the "Add Result" form for the KPI "Training Train 82 employees by June 30, 2015". The KPI description is: "Requirement of Vice President Trainer will keep tally of emails, telephone calls, and office visits of employees that need assistance. Trainer will also print out a report as end result to determine successful completion of KPI entries." The action to meet the goal is "82 units (academic and non-academic)". The measurement period is "Nov. 21st will provide employees an opportunity to enter KPIs. On Dec. 5th, all KPIs should be entered. Assessment will be made until Dec. 5, 2014." The key performance indicator is "Requirement of Vice President".

The form fields are as follows:

- Result Date:** 06/03/2016 (Callout 9)
- Result:** (Empty text field) (Callout 10)
- Action Status:** (Dropdown menu) (Callout 11)
- Result Type:** (Dropdown menu) (Callout 12)

The "Save" button is highlighted with a yellow callout box and a question mark icon (Callout 13). A "Return" button is also visible. A legend indicates that an asterisk (\*) denotes a required field. A "Legal Notice" link is located at the bottom of the page.

## To Retrieve Report:

14. Click the **Reports** tab from the left-hand navigation pane.
15. Click the **Standard Reports** sub-tab.
16. Select **Key Performance Indicator Report**.

The screenshot displays the TracDat v5.0.50 web application interface. The browser address bar shows the URL: `tracdat.hamptonu.edu/tracdat/faces/common/reports/standardReports.xhtml`. The page title is "KPI (Non-Academic) - Training Tutorial". The user is logged in as "adminmclawson".

The left-hand navigation pane is expanded, showing the following menu items:

- Home
- Department
- Department Planning
- Mapping
- Data Tools
- Reports** (highlighted with a yellow box and circled number 14)
- Standard Reports (highlighted with a yellow box and circled number 15)
- Ad Hoc Reports
- Documents

The main content area displays the "Standard Reports" section, which includes the following reports:

- Department Reports**
  - [Assessment: Assessment Unit Planning](#): This report shows the Goals Defined for each selected Department, along with any information contained in the Key Performance Indicator area related to each Performance Goal Defined and any recorded Results. This may include any Mapping for the Goals Defined 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.
  - [Key Performance Indicator Report](#) (highlighted with a yellow box and circled number 16): This report shows the Goals Defined for each selected Department, along with any Measurement of Goals, Results, and Action Plans for each Performance Goal Defined. 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.
- Reports**
  - [Relationships and Assessment: by Performance Goals \(Department\)](#): This report shows the Performance Goals and any for each selected that have been mapped to the Performance Goals. By default, the 'Show Details' option is selected which will also display the Planning data for each : Details, , , and . To just see the Mapping relationships, uncheck the 'Show Details' option before running the report.
- Mapping**

A "Legal Notice" link is visible at the bottom of the page.

## To Open Report:

17. Enter **Result Date** (i.e. 01/01/2016 and 06/30/2016).
18. Click **Open Report** tab in upper right corner (near Return button).

The screenshot shows the TracDat v5.0.50 web application interface. The browser address bar displays the URL: `tracdat.hamptonu.edu/tracdat/faces/faces/common/reports/FourColumn.xhtml`. The page title is "KPI (Non-Academic) - Training Tutorial". The user is logged in as "adminmclawson".

The navigation menu on the left includes: Home, Department, Department Planning, Mapping, Data Tools, Reports (selected), Standard Reports, Ad Hoc Reports, and Documents.

The main content area is titled "KPI (Non-Academic) - Training Tutorial > Reports > Standard Reports > Key Performance Indicator Report".

The "Layout" section includes:

- Format: PDF
- Report Title: Key Performance Indicator Report
- Report Subtitle: (empty)
- Report Logo: Hampton U Logo\*

The "Filter" section includes:

- Goal Status: (empty)
- Goal Types: (empty)
- Assessment Method Categories: (empty)
- Sort Results:  Ascending,  Descending
- Result Date Between: 01/01/2016 and 06/30/2016
- Action Status: (empty)
- Result Types: (empty)

The "Options" section includes:

- Include Performance Goal Defined with no Results:
- Include Measurement of Goals with no Results:
- Include Inactive Measurement of Goals:
- Include Fields With No Data:

Two yellow callout boxes are present: one labeled "17" pointing to the "Result Date Between" field, and another labeled "18" pointing to the "Open Report" button in the top right corner.

# Print Report

- Report is complete!
- Print. *Note:* Individual printers may have different printing properties. Please use your printer's guideline to print landscaped formatted report.

The screenshot shows a web browser window with the following details:

- Browser: TracDat v5.0.50
- Page Title: FourColumn.xhtml
- URL: tracdat.hamptonu.edu/tracdat/faces/common/reports/FourColumn.xhtml
- Page: 1 of 1

The report content is as follows:

Goals Defined	Measurement of Goals	Results	Action Plans
<p><b>Training</b> - Train 82 employees by June 30, 2015  <b>Goal Status:</b> Active</p>	<p><b>Requirement of Vice President</b> - Trainer will keep tally of emails, telephone calls, and office visits of employees that need assistance. Trainer will also print out a report as end result to determine successful completion of KPI entries.  <b>Action To Meet Goal:</b> 82 units (academic and non-academic)  <b>When Measured?:</b> Nov. 21st will provide employees an opportunity to enter KPIs. On Dec. 5th, all KPIs should be entered. Assessment will be made until Dec. 5, 2014.</p>	<p><b>Action Status:</b> Action Plan Completed  <b>Result Type:</b> Criterion Not Met                      63 or 77 percent of the units completed KPI results entries.                      82 emails were received.                      205 telephone calls were received.                      75 office visits were made. (12/05/2014)</p>	
<p><b>Day of Assistance</b> - A day will be set aside to assist employees with TracDat.  <b>Goal Status:</b> Active  <b>Goal Type:</b> Key Performance Indicator</p>	<p><b>Requirement of Vice President</b> - Count number in attendance and number of that enter KPIs.  <b>Action To Meet Goal:</b> 82 employees should enter KPIs.  <b>When Measured?:</b> May 21, 2016 - Number in attendance.                      June 5, 2016 - Number of units that entered KPIs.</p>	<p><b>Action Status:</b> Action Plan in Progress  <b>Result Type:</b> Criterion Not Met                      3 employees have been trained. (11/13/2014)</p>	<p><b>Action Plan:</b> Classroom has been reserved. An email with more information will be available for employees. (11/14/2014)</p>

Page 1 of 1

Generated by TracDat® a product of Nuventive

## To Add a Performance Goal or KPI:

1. Select Key Performance Indicator on left navigation tab.
2. Select Green icon with plus sign on far right of **Performance Goals** to add goal. Do not relate goal.
3. Select Green icon with plus sign on far right of **Goals Defined** to describe goal. You do not need to put a date.

The screenshot displays the TracDat v5.0.50 web application. The browser address bar shows the URL: `tracdat.hamptonu.edu/tracdat/faces/assessment/unit_planning/assessmentPlan.xhtml`. The page title is "KPI (Non-Academic) - Health Center VP Administrative Services". The left navigation menu is expanded to show "Key Performance Indicator" (highlighted with a yellow box and circled number 1). The main content area is divided into two sections: "Performance Goals" and "Goals Defined". The "Performance Goals" section has a plus icon (highlighted with a yellow box and circled number 2) to add a new goal. The "Goals Defined" section has a plus icon (highlighted with a yellow box and circled number 3) to add a new goal. The "Goals Defined" section lists several goals, including "Health Care Services", "Disease Surveillance", "Revenues", "Health Education", "Electronic Medical Records", "Student Peer Education", "Grant Writing", and "Collaborative Relationships".