



# TracDat Version 4 User Reference Guide

# Data Tools Tab Measures and Groups

This reference guide is intended for TracDat users with access to the Data Tools Tab. This data collection tool allows the user to create custom measures and create or upload multiple groups that can then report the data requested directly into TracDat

This reference guide will serve as a general introduction to the Data Tools – here you will find a step-by-step walkthrough in addition to some definitions and explanations of its functionality and the edit screens. This guide is not intended to serve as a replacement for training and/or consultation on TracDat.

The information in this reference guide is organized according to the stock nomenclature that originally comes with TracDat. **Please be aware that your experience with TracDat may look slightly different than the screenshots below due to the software’s dynamic labeling feature and your specific institution’s configuration.**

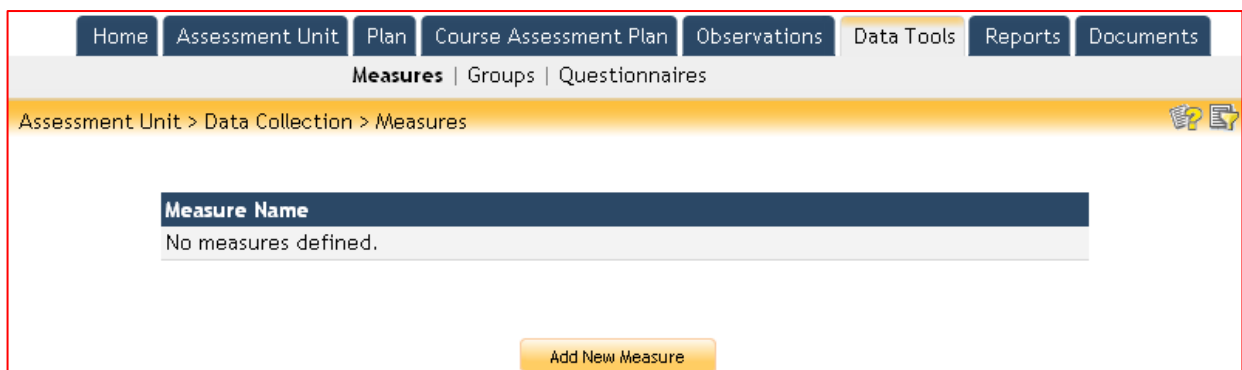
### Note to TracDat Administrators

- The **Data Tools** feature may be toggled on and off for any unit under:  
Institution > Configuration > Application Settings > Navigation Settings > Data Tools (**This also turns off the Questionnaire feature for that unit**)
- The **Questionnaire** feature may be toggled on and off for any unit under:  
Institution > Configuration > Application Settings > Navigation Settings > Data Tools > Questionnaire

**!! Units checked here will NOT see the Data Tools and/or Questionnaire!!**

## Navigation – Getting There

The Data Tools feature may be accessed by clicking the Data Tools tab from the top navigation menu. This will then bring up the sub-tabs of Measures, Groups, and if left available – Questionnaires. If you do not see the Data Tools tab and require this functionality, please contact your TracDat Administrator.





## Starting Off – Where to Create the Measures and Groups

The Data Tools feature may be used and managed from many different Units (both Assessment and Reporting Units) within TracDat. Deciding on where to create your Measures and Groups usually depends on who will be managing the measures, groups, and associated data.

If someone has an Admin or User role for the Unit where the Measures and Groups are created, they will have access to create, edit, and delete both Measures and Groups as well as enter data related to the groups.

In short, create the Measures and Groups at the level where they will be managed, not at the level where the data will be entered, as the data entry can be assigned out to other login and/or email only users.

## Creating a Measure

Generically defined, a measure is a collection of fields that are evaluated across one or more groups. Setting up the correct measure is the first step to a successful data tools implementation.

### 1. Click on ‘Add New Measure’

When first using Data Tools, you will not have any Measures saved, so there will not be any measures defined. Select ‘Add New Measure’ to develop a new measure.

Measure Name
No measures defined.
<a href="#">Add New Measure</a>

### 2. Define your Measure

Name:	<input type="text" value="Sample Measure"/>
Instructions:	<input type="text" value="Please score the field for each individual in the group."/>
Fields:	
Label	Value Type
No fields defined.	

**Name:** This is the name of the measure – all measures must have at least a name.



**Instructions:** The instructions will appear for those entering data for the defined groups (optional).

**Fields:** Fields and Categories will be defined in the next step.

### 3. Define your Fields

When first creating your measure, you will not have any fields defined. There are four types of fields available for use in your measure:

**Numeric Input** – Users can enter a numeric value for a ‘score’ on the field, under conditions that you define.

Label: \* Sample Numeric  
Value Type: Numeric Input  
Minimum Value: 0 Maximum Value: 5 Decimal Places: 0

**Text Input** – Users can enter text for a ‘score’ on the field.

Label: \* Sample Text  
Value Type: Text Input

**Select from List (Numeric)** – Users can choose a pre-defined text ‘score’ on the field with corresponding numeric value.

Label: \* Sample List (Numeric)  
Value Type: Select From List (Numeric)

		Add Item	
Item Label	Item Value		
Superior	4	<a href="#">edit</a>	<a href="#">delete</a>
Proficient	3	<a href="#">edit</a>	<a href="#">delete</a>
Average	2	<a href="#">edit</a>	<a href="#">delete</a>
Developing	1	<a href="#">edit</a>	<a href="#">delete</a>

**Select from List (Text)** – Users can choose a pre-defined text ‘score’ on the field.

Label: \* Sample List (Text)  
Value Type: Select From List (Text)

		Add Item	
Item			
Superior		<a href="#">edit</a>	<a href="#">delete</a>
Proficient		<a href="#">edit</a>	<a href="#">delete</a>
Average		<a href="#">edit</a>	<a href="#">delete</a>
Developing		<a href="#">edit</a>	<a href="#">delete</a>

### Setting up a ‘Typical’ Rubric:

The most common field chosen for a rubric is the Select from List (Numeric). This choice allows users entering the data to choose a text ‘score’ (e.g. Proficient, Average) for the field while also attaching a corresponding numerical value (e.g. 4) to the ‘score’. This numerical data can be extracted to Excel and analyzed to get meaningful group conclusions.

## 4. Defining Categories

Categories are descriptive tags that can be used to identify sets of fields. They can be used as headers to categorize those fields in complex or large measures.

Building on what has been illustrated thus far, here is the completed measure below.

Name:

Instructions:

Fields:

Label	Value Type	
<b>Sample Category 1</b>		<a href="#">edit</a>   <a href="#">delete</a>
Sample Numeric	Numeric	<a href="#">edit</a>   <a href="#">delete</a>
Sample Text	Text	<a href="#">edit</a>   <a href="#">delete</a>
<b>Sample Category 2</b>		<a href="#">edit</a>   <a href="#">delete</a>
Sample List (Numeric)	Select From List (Numeric)	<a href="#">edit</a>   <a href="#">delete</a>
Sample List (Text)	Select From List (Text)	<a href="#">edit</a>   <a href="#">delete</a>

## Creating a Group

Generically defined, a group is a collection of individuals for whom the fields in the associated measure are scored. Each group is connected to a measure and then data can be entered for each individual in the group according to that measure. Each group will be ‘scored’ according to the measure by one ‘rater’. If there will be more than one rater per set of individuals, there needs to be a group for each rater since each group is assigned to only one rater. Individuals may be in more than one group.

### 1. Adding a New Group

When first using Data Tools, you will not have any Groups saved, so there will not be any groups defined. There are two ways to create groups in Data Tools: ‘Add New Group’ will create your group from scratch – best for creating small groups or simple groups quickly. ‘Import Groups’



will allow you to import groups using Excel – best for existing groups, large groups, or complex groups that have demographic data associated with them. Both ways are described below.

Group Name	Measure	Assigned To	Completion Date
No groups defined.			
<input type="button" value="Add New Group"/>		<input type="button" value="Import Groups"/>	

### 1A. Click on ‘Add New Group’ – Defining your Group

Name: \*

Measure: \*

Assigned To: , [remove](#)

Completion Date:

Individuals:

ID	Display Name
No individuals defined.	

**Name:** This is the name of the group.

**Measure:** This is the measure that the group will be associated with (i.e. for each individual in the group, you will be able to score each field on the measure).

**Assigned to:** Each group may be assigned to a TracDat user who has any type of permission to the unit in which the measure/group is created.

**Completion Date:** If the group was assigned to a TracDat user, this is the date that the data was submitted as ‘completed’.

**Individuals:** Individuals can be any type of data point, whether they be students, faculty, staff, departments, campus locations, etc. To add individuals to the group, proceed to step 2.

### 1B. ‘Import Groups’

Select Measure:

\*

Please upload an Excel Spreadsheet to add Groups:

[Example Spreadsheet](#)



You have the ability to upload groups into the Data Tools section using existing lists from Excel. Download the ‘Example Spreadsheet’ and edit, keeping the headers and replacing the downloaded information with your group data. Only do one group at a time.

You only need to have the first column filled out, the rest of the individuals’ information is not required to upload the group into TracDat, although you may want to fill it out for informational purposes.

IndividualDisplayName	Instituiton	IndividualId	LastName	FirstName	Email
Individual, Sample	sIndividual	Individual	Sample		<a href="mailto:sampleindividual@sample.edu">sampleindividual@sample.edu</a>

After the Excel document is completed and saved, close it and go back to the Import Groups page. Then select the measure that the group is to be associated with, browse to your Excel document, and complete the upload. Skip over step 2.

## 2. Adding Individuals to a Group

When editing a group, you can add and edit the individuals within that group. TracDat assumes that the individual is a person, so you are presented with fields that describe personal attributes. However, the only required field here is the Display Name, so the rest of these fields are optional.

ID:	<input type="text" value="12345"/>
First Name:	<input type="text" value="Sample"/>
Last Name:	<input type="text" value="Individual"/>
Display Name: *	<input type="text" value="Sample Individual"/>
E-mail:	<input type="text" value="sampleindividual@sample.edu"/>

**ID:** Optional Field – This could be a student ID number, possibly used for later analysis and joining with other student data.

**First Name, Last Name:** Optional Field – TracDat assumes that the individual is a person, and this is where you can put their name, if applicable.

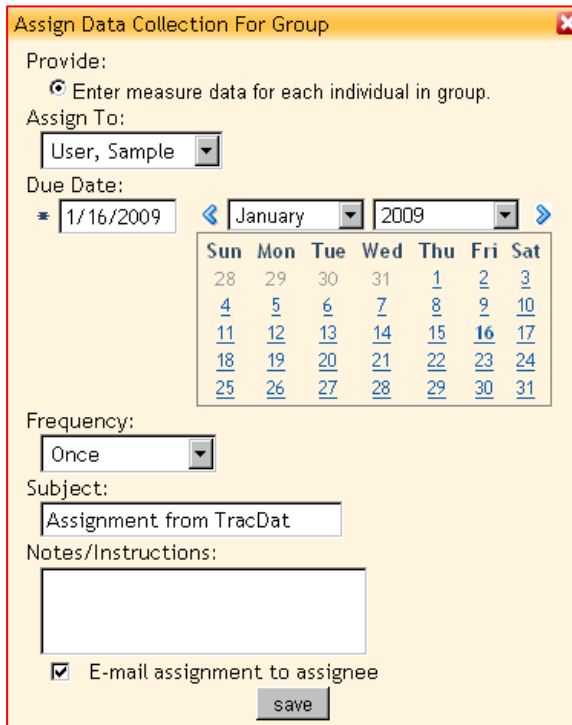
**Display Name:** Required Field – This is what the rater will see when reporting the data on the individual. This can be anything that can identify the individual (e.g. name, ID number, last four digits of SS#, etc.).

**E-mail:** Optional Field – TracDat assumes that the individual is a person, and this is where you can put their email address, if applicable.

Add as many individuals as necessary, making sure to create separate groups if a new rater is needed to score the same individuals. Individuals may appear in more than one group, but each group may only be assigned to one rater.

## Assigning a Group to a Rater

Groups may be assigned to one rater at a time. Potential raters must be assigned to the correct unit for them to be able to receive the assignment email (i.e. the unit where the measure and groups are created and stored).



**Assign To:** Choose the rater from the list of available assignees. If the person does not show in this list, contact your TracDat Administrator.

**Due Date:** Assign a due date for the assignment. This is the date by which the data should be entered into TracDat.

**Frequency:** If this assignment should be repeated, the options are: Monthly, Quarterly, Semi-annually, Annually.

**Subject:** This is what will show in the subject line for the e-mail to the assignee.

**Notes/Instructions:** This is what will show in the body of the e-mail to the assignee. You may want to include any additional instructions you may have for the timeline, completion, or follow through of the assignment.

**E-mail assignment:** Check this box to send an e-mail and notify the assignee of the assignment.

### Overview of the Assignment/E-mail process:

If you assign the group/measure today, the e-mail to the assignee is delivered today with a link to the proper data entry screen in TracDat. The assignee does not need to login to TracDat.

The assignee can complete the assignment at any time by clicking the link within the e-mail. The user can save as many times as necessary before submitting the assignment as complete.

In addition, each assignment e-mail is delivered with a calendaring attachment that allows the user to place the assignment on his/her electronic calendar as an appointment on the due date for a reminder.

Building on what has been illustrated in this guide, below is an example of what an assignee will see after clicking on the assignment link. The measure appears below the measure name and instructions, and the rater will be able to enter a score for each individual in his/her assigned group.

Sample Group

Instructions:  
Please score each field for each individual in the group.

	Sample Category 1		Sample Category 2	
	Sample Numeric	Sample Text	Sample List (Numeric)	Sample List (Text)
Sample Individual 1	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Sample Individual 2	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Sample Individual 3	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Sample Individual 4	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

After the data is entered, the assignee should click the **Save Changes** button. This saves the data in TracDat, but allows the assignee to make changes to the data using the hyperlink in the e-mail to gain access.

Once the assignee finishes entering the data, they should **Mark Assignment as Completed**. This invalidates the hyperlink in the e-mail and the data cannot be altered except by a user with access to the unit in which the measure/group is stored.

Sample Group

Instructions:  
Please score each field for each individual in the group.

	Sample Category 1		Sample Category 2	
	Sample Numeric	Sample Text	Sample List (Numeric)	Sample List (Text)
Sample Individual 1	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Sample Individual 2	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Sample Individual 3	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Sample Individual 4	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Should the rater need to alter the data after the assignment has been marked as complete, the assignment completion can be cleared by editing the group and clearing the completion date.

Name: \*

Measure: \*

Assigned To: User, Sample [remove](#)

Completion Date:  [clear](#)

Individuals:

ID	Display Name	
12345	Sample Individual 1	<a href="#">edit</a>   <a href="#">delete</a>
12346	Sample Individual 2	<a href="#">edit</a>   <a href="#">delete</a>
12347	Sample Individual 3	<a href="#">edit</a>   <a href="#">delete</a>
12348	Sample Individual 4	<a href="#">edit</a>   <a href="#">delete</a>



## Entering Data without an Assignment

Data may be entered for the group without creating an assignment. Whoever will be completing the measure for the group must have access to the unit in which the measure and group exists. The rater should select the correct unit, go to the **Data Tools** tab, and then click on the **Groups** sub-tab. The rater can then click on the **enter data** link to pull up the measure and enter the data for each individual.

Group Name	Measure	Assigned To	Completion Date	
Sample Group	Sample Measure			<a href="#">edit</a>   <a href="#">delete</a>   <a href="#">enter data</a>

Building on what has been illustrated in this guide, below is an example of what a rater would see when entering data for a group. When finished, click **Save Changes** to enter the information into TracDat.

Sample Group

Instructions:  
Please score each field for each individual in the group.

	Sample Category 1		Sample Category 2	
	Sample Numeric	Sample Text	Sample List (Numeric)	Sample List (Text)
Sample Individual 1	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Sample Individual 2	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Sample Individual 3	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Sample Individual 4	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Save Changes
Discard Changes
Return

## Exporting Data

Measure Name	
Sample Measure	<a href="#">edit</a>   <a href="#">delete</a>   <a href="#">export data</a>

Data for each measure may be exported into Excel via the **export data** link on the Measures sub-tab.

Measure: Sample Measure

Generate Export

Clicking the **Generate Export** button will export data from all groups associated to the measure. To only return select groups, use Excel to filter your results.

For detailed assistance on Excel, you may want to visit <http://office.microsoft.com/en-us/excel>.