



TracDat Version 4.4 User Reference Guide

Ad Hoc Reporting Tool

This reference guide is intended for TracDat users with access to the Ad Hoc Reporting Tool. This reporting tool allows the user to create custom queries from the TracDat database to return data in views and sets not found on the stock TracDat reports.

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

Since the Ad Hoc Reporting Tool is an evolving feature of TracDat, we encourage you to share your feedback with us about the tool's usability, data retrieval, and interface. Please email us at support@nuventive.com.

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 Ad Hoc Reporting Tool may be toggled on and off for any unit under Institution > Configuration > Application Settings > Navigation Settings > Reports > Ad Hoc

!! Units checked will NOT see the Ad Hoc Reporting Tool !!

Navigation – Getting There

Within TracDat, reports are divided into one of 5 groups:

Administrative – Institution/Reporting Unit – Assessment Unit – Course – Ad Hoc

Depending on your Permissions, Navigation Settings, and Dynamic Labeling, when you are at the Assessment Unit level, you will see some form of these headings under the Reports Tab:

Assessment Unit | Course | **Ad Hoc**

At the Reporting Unit level, you will see these:

Reporting Unit | Assessment Unit | Course | **Ad Hoc**

and at the Institution level, you will see these:

Admin | Institution / Reporting Unit | Assessment Unit | Course | **Ad Hoc**

Creating a Report

Because of the flexibility and potential formatting of the tool, creating a good Ad Hoc Report may take a few tries to get it exactly how you want it. This guide will show a good way to start and some tips to keep in mind, but there are many different routes to take that could be successful.

1. Click on Create New Ad Hoc Report button

When first using the reporting tool, you will likely not have any Ad Hoc Reports saved, so there will not be any reports defined. Select the **Create New Ad Hoc Report** button to start a new report.

Report Title	Description	Data View	Created By
No Ad Hoc Reports defined.			
<div>Create New Ad Hoc Report</div>			

2. Define your Report

Edit Report

Preview Report

Output: *

PDF

Layout: *

Landscape

Title: *

Subtitle:

Description:

Data View:

Open Report

Save

Download as Zip

Save to Document Repository

Output: Reports can be run as HTML, PDF (default), (Microsoft) EXCEL, or (Microsoft) WORD.

Suggestions:

HTML is best for **Reports** that you would like to **View On-Screen**.

PDF is best for **Small** (few pages) **Reports** that you would like to **Print As Is**.

EXCEL is best for **Reports** that have a **Large Data Set**, those that need **Extensive Formatting Changes**, or those that will benefit from the **Advanced Filtering** and **Sorting** capabilities in Excel.

WORD is best for **Reports** that you would like to **Print**, but with **Formatting Changes**.



Layout: Reports can appear as either Landscape (default) or Portrait (in HTML, PDF, and WORD).

Title: Reports must have a title – this will appear at the top of the report (in HTML, PDF, and WORD).

Subtitle: This will appear underneath the report Title on the report (in HTML, PDF, and WORD).

Sample Title
Sample Subtitle
Sample Data Columns
Assessment Unit

Description: Does not appear on the report - Only appears on the Ad Hoc Report listing. Often used for further distinction among reports.

Report Title	Description	Data View	Created By
Sample Title	Sample Description	Assessment Unit - Unit Summary	Admin, TracDat edit run copy delete

3. Choose your Data View

Data View: In Ad Hoc Reporting, data can be requested by existing sets of database fields within TracDat. The Data View allows you to choose from one of the more commonly queried sets. This collection is ever-expanding and will continue to be modified to users' needs.

The Data Views mainly represent the data behind the different navigation tabs within TracDat. Depending on the Unit selected from the Selected Unit drop-down in TracDat, the Data Views currently available in for the Ad Hoc Report are:

****Below are the original labels from TracDat – these may have been altered for your Institution****

Managing Data Views:

TracDat Administrators will be able to hide individual Data Views for either all Assessment Units and/or all Reporting Units. This can be done by navigating to: Institution > Reports > Ad Hoc > Manage Data Views and then editing each Data View to be hidden.

!! Type of Unit checked will NOT see the applicable Data View !!

Data View Name

Administrative – Assignments

Administrative – Courses

Administrative – Dynamic Labels

Administrative – Personnel

Assessment Unit – Course Assessment Plans

Assessment Unit – Course Assessment Plans Summary

Description

Data Fields related to Assignments within Selected Units

Data Fields related to Courses within Selected Units

Data Fields under the Configuration Tab > Labels Sub-Tab

Data Fields related to Personnel within Selected Units

Data Fields under the Course Assessment Plan Tab

Data Fields appearing under the Home > Summary Tab related to Course data



Assessment Unit – Course Observations	Data Fields under the Assessment Plan and Observations Tabs related to Course data
Assessment Unit – General	Data Fields under the Assessment Unit Tab > General Sub-Tab
Assessment Unit – Objective Summary by Objective Status	Selected Data Fields under the Assessment Plan and Observations Tabs related to Unit Objectives
Assessment Unit – Objective Summary by Objective Type	Selected Data Fields under the Assessment Plan and Observations Tabs related to Unit Objectives
Assessment Unit – Assessment Plan	Data Fields under the Assessment Plan Tab
Assessment Unit – Unit Observations (All Observations)	Data Fields under the Assessment Plan and Observations Tabs related to Unit data – All Observations
Assessment Unit – Unit Observations (Related directly to Objectives)	Data Fields under the Assessment Plan and Observations Tabs related to Unit data – Only those Observations related directly to Objectives
Assessment Unit – Unit Observations (Related to Tasks)	Data Fields under the Assessment Plan and Observations Tabs related to Unit data – Only those Observations related to Tasks
Assessment Unit – Unit Observations (Related to Assessment Methods)	Data Fields under the Assessment Plan and Observations Tabs related to Unit data - Only those Observations related to Assessment Methods
Assessment Unit – Unit Summary	Data Fields appearing under the Home > Summary Tab related to Assessment Unit data
Assessment Unit – Observations (All Observations) related to Goals	Data Fields under the Assessment Plan and Observations Tabs related to Unit data – All Observations + Related Goals
Assessment Unit – Observations (Related directly to Objectives) related to Goals	Data Fields under the Assessment Plan and Observations Tabs related to Unit data – Only those Observations related directly to Objectives + Related Goals
Assessment Unit – Observations (Related to Tasks) related to Goals	Data Fields under the Assessment Plan and Observations Tabs related to Unit data – Only those Observations related to Tasks + Related Goals
Assessment Unit – Observations (Related to Assessment Methods) related to Goals	Data Fields under the Assessment Plan and Observations Tabs related to Unit data - Only those Observations related to Assessment Methods = Related Goals
Assessment Unit – Unit Plans related to Goals	Data Fields under the Assessment Plan Tab + Related Goals
Institution – General	Data Fields under the Institution Tab > General Sub-Tab
Reporting Unit – General	Data Fields under the Reporting Unit Tab > General Sub-Tab
Reporting Unit – Observations	Data Fields under the Observations Tab; also includes Goals under Reporting Unit Tab > General Sub-Tab
Reporting Unit – Summary	Data Fields appearing under the Home > Summary Tab related to Reporting Unit data



Unit – Goal Relationships

Data Fields under the Institution/Reporting Unit/Assessment Unit Tab > Goals Sub-Tab; used to retrieve relationships between sets of Goals within TracDat

Unit – Goals

Data Fields under the Institution/Reporting Unit/Assessment Unit Tab > Goals Sub-Tab; used to retrieve lists of Goals

Enter Query

SQL Query String for Advanced Users and Custom Reports

‘Enter Query’ Feature:

If there is a special combination of data that you would like to retrieve, enter a SQL query string to run a custom report or contact Nuventive Services Consultant to see if we can work with you to create a custom report or ensure that you can query the necessary data.

NOTE: This feature is only available to those with TracDat Administrator permissions.

4. Choose your Unit(s) and Reporting Fields

Output:

Layout:

Title:

Subtitle:

Description:

Data View:

Units:

Units: Choose the Unit(s) that you would like to see on the report. If you are currently in an Assessment Unit, you will only see that Unit available. Pick the Unit by clicking on it.

Tip: Select multiple Units by holding the Ctrl (Mac = Command) Key down and clicking. Or you can hold the Shift key to select multiple consecutive Units.

Reporting Fields: Choose the Data Fields that you would like to query by placing a check in the box to the left of the Data Field Title.

The Ad Hoc Reporting Tool will query the selected Data Fields in the selected Unit(s) and then display the results in columns from left to right, starting with the topmost selected Data Field on the left.

Column Selection:

	Title	Width	Format	Footer Summary
<input type="checkbox"/>	Assessment Unit	500		<input type="text" value="group by this column"/>
<input type="checkbox"/>	Total Goals	200		<input type="text" value="group by this column"/>

Tip: The field Titles will be the dynamic labels corresponding to the Unit Type of the Unit that you are working in. If you would like to see the original database field names, you can hold your cursor over each field title.
































After marking your Data Fields, you can click the **Save** button at the bottom of the window. This will save your report for future use and also let anyone else who has access to the Unit to run it. Save when you have made good progress on building the report – navigating away from the page will negate all work that hasn't been saved. You can always edit the saved version!

5. Refining the Reporting Fields

After saving the report, click the **Run Report** button to get a sense of what the report looks like. This will give you an idea of where the data appears and the general layout of the report.

The Ad Hoc Reporting Tool creates reports that are columnar in nature. They are structured similar to the 4 and 5-column stock TracDat reports but only display the fields that you choose. However, you can modify some variables to the look and functionality of the report.

You can make the below changes if you return to the Ad Hoc > Edit Screen:

	Title	Width	Format	Footer Summary
 	<input checked="" type="checkbox"/> Renaming the fields	500		Count  group by this column
 	<input checked="" type="checkbox"/> will Rename them for	200	Currency 	Distinct Count  group by this column
 	<input checked="" type="checkbox"/> this Ad Hoc Report only	200	Number (no decimals) 	Total  group by this column
 	<input checked="" type="checkbox"/> if you Save the changes.	200	Number (1 decimal) 	Average  group by this column
 	<input checked="" type="checkbox"/> Hovering over the field	200	Number (2 decimals) 	Standard Deviation  group by this column
 	<input checked="" type="checkbox"/> with your cursor will allow	200		Variance  group by this column
 	<input checked="" type="checkbox"/> you to see the original	200		Minimum  group by this column
 	<input checked="" type="checkbox"/> database field names.	200		Maximum  group by this column

A. Change the Order of the Data Fields that appear on the Report. Since the Ad Hoc Reports retrieve data in a columnar display, the first field checked will appear first on the left side of the report, the second next, and so forth. Using the arrows to the left of the Field names, you can reorder the fields so they appear either further left or right on the report.

B. Rename the Data Field Titles – this will rename them only for the current Ad Hoc Report.

- C. **Adjust the Width of the Data Field** on the Report (numbers are in pixels). Fields are pre-set to a certain width but may be altered to create a more readable and intuitive report. **Note:** Custom fields appear as 1500 pixels by default. Make them smaller if they take up too much room on the report.
- D. **Change the Format** of numerical fields on the Report. You can adjust the number of decimals, or format the numerical data to display as currency with a dollar sign and two decimal places.
- E. **Add a Footer Summary** to the bottom of the Report related to each Field. **The options in the drop-down for the Footer Summary depend on the type of Field;** **Text Fields** can be counted (Count = total data points returned, Distinct Count = total *unique* data points returned), **Date Fields** can also be counted and the Min/Max be returned (Count, Distinct Count, Minimum, Maximum), and **Numerical Fields** have all options (Count, Distinct Count, Minimum, Maximum, Total, Average, Standard Deviation, Variance).
- F. **Select one or more Data Fields to Group** the data. Grouping by a certain column will automatically place that field at the top of the field order (and make it left-most on the report). In addition, repetitive entries will be eliminated, allowing for a more clean and understandable report.

Examples of the group by this column feature:

Not Grouped

Outcome Name	Outcome	Result
Outcome 1	Students will be able to write effectively.	Result 1
Outcome 1	Students will be able to write effectively.	Result 2
Outcome 1	Students will be able to write effectively.	Result 3
Outcome 2	Students will be able to think critically.	Result 1
Outcome 2	Students will be able to think critically.	Result 2

Grouped by Outcome Name

Outcome Name	Outcome	Result
Outcome 1	Students will be able to write effectively.	Result 1
	Students will be able to write effectively.	Result 2
	Students will be able to write effectively.	Result 3
Outcome 2	Students will be able to think critically.	Result 1
	Students will be able to think critically.	Result 2

Grouped by Outcome Name first, then Outcome

Outcome Name	Outcome	Result
Outcome 1	Students will be able to write effectively.	Result 1
		Result 2
		Result 3
Outcome 2	Students will be able to think critically.	Result 1
		Result 2

- G. **Filter the Report**  There is the option to further filter the results by field criteria.

- 1) **Select the Field** where you would like to filter.
- 2) **Select the Type of Filter** to use.

- 3) Enter in the Criteria to filter the fields.
- 4) Click the **Insert** button to Add the Filter
- 5) Repeat for Additional Filters, using AND/OR to qualify the filter

Where Filter:

objectivename = Outcome 1

Insert

Clear

Types of Filters to use and their Meanings:

=	Equals / Is
!=	Does NOT Equal / Is NOT
>	Greater Than
<	Less Than
>=	Greater Than or Equal to
<=	Less Than or Equal to
LIKE	Field is Similar to
NOT LIKE	Field is NOT Similar to
IS NULL	Field Equals Blank
IS NOT NULL	Field Equals NOT Blank

Tip: To Filter By Text

Use the LIKE filter type to account for possible misspellings or mistakes. To use wildcard character(s) to expand your search, use the LIKE filter type and add the % symbol to indicate a wildcard. When you use the LIKE filter, TracDat will automatically add wildcard characters bookending the search.

Example:

To return any Assessment Methods that have the words 'writing' and 'rubric' in them, your Filter Entry should look similar to the one below:

d.assessmentMethod LIKE '%writing%rubric%'

Tip: To Filter By a Date Range

Use Greater Than or Equal to filter type, enter the date range beginning date and click 'Insert'.
Use the Less Than or Equal to filter type, enter the date range end date and click 'AND'

Example:

Your Filter Entry should look similar to the one below:

b.observationDate > '1/1/2011' AND b.observationDate < '12/31/2011'

5. Permissions to Ad Hoc Reports

Since Ad Hoc Reports are saved to the unit in which they were created, all saved reports are accessible to any TracDat users who have access to the Ad Hoc reports within that unit.



However, depending on the permissions of the TracDat user, he/she will have varying access to the Ad Hoc Report, based upon who created the report. The permissions are defined below:

TracDat Admin:	Create – New Reports Edit / Run / Copy / Delete – All Ad Hoc Reports
(Unit) Admin:	Create – New Reports Edit / Run / Copy / Delete – All Ad Hoc Reports in the Unit
User:	Create – New Reports Run / Copy – All Ad Hoc Reports in the Unit Edit / Run / Copy / Delete – Ad Hoc Reports that they have Created
Reports Only:	Create – New Reports Run / Copy – All Ad Hoc Reports in the Unit Edit / Run / Copy / Delete – Ad Hoc Reports that they have Created

Copying an Existing Ad Hoc Report will allow the user to rename and then modify the original report so that the original report is preserved; yet the user can make changes and then save those changes as their own report. Ad Hoc Reports that are created in an Assessment Unit can be copied to other Assessment Units. Likewise, Ad Hoc Reports that are created in a Reporting Unit can be copied to other Reporting Units.

Copy Name *	Copy Sample Report
<input type="checkbox"/>	
<input type="checkbox"/>	Accounting
<input type="checkbox"/>	Admin - Academic & Career Advising
<input type="checkbox"/>	Admin - Counseling Services
<input type="checkbox"/>	Admin - Food Services

Examples of the different Types of Permissions:

Logged in as (Unit) Admin (or TD Admin):

Report Title	Description	Data View	Created By	
Report 1	Report Created by Admin	Administrative - Assignments	Johnson, Scott	edit run copy delete
Report 2	Report Created by User	Assessment Unit - Unit Summary	DeSante, Paul	edit run copy delete

Logged in as (Unit) User (or Reports Only):

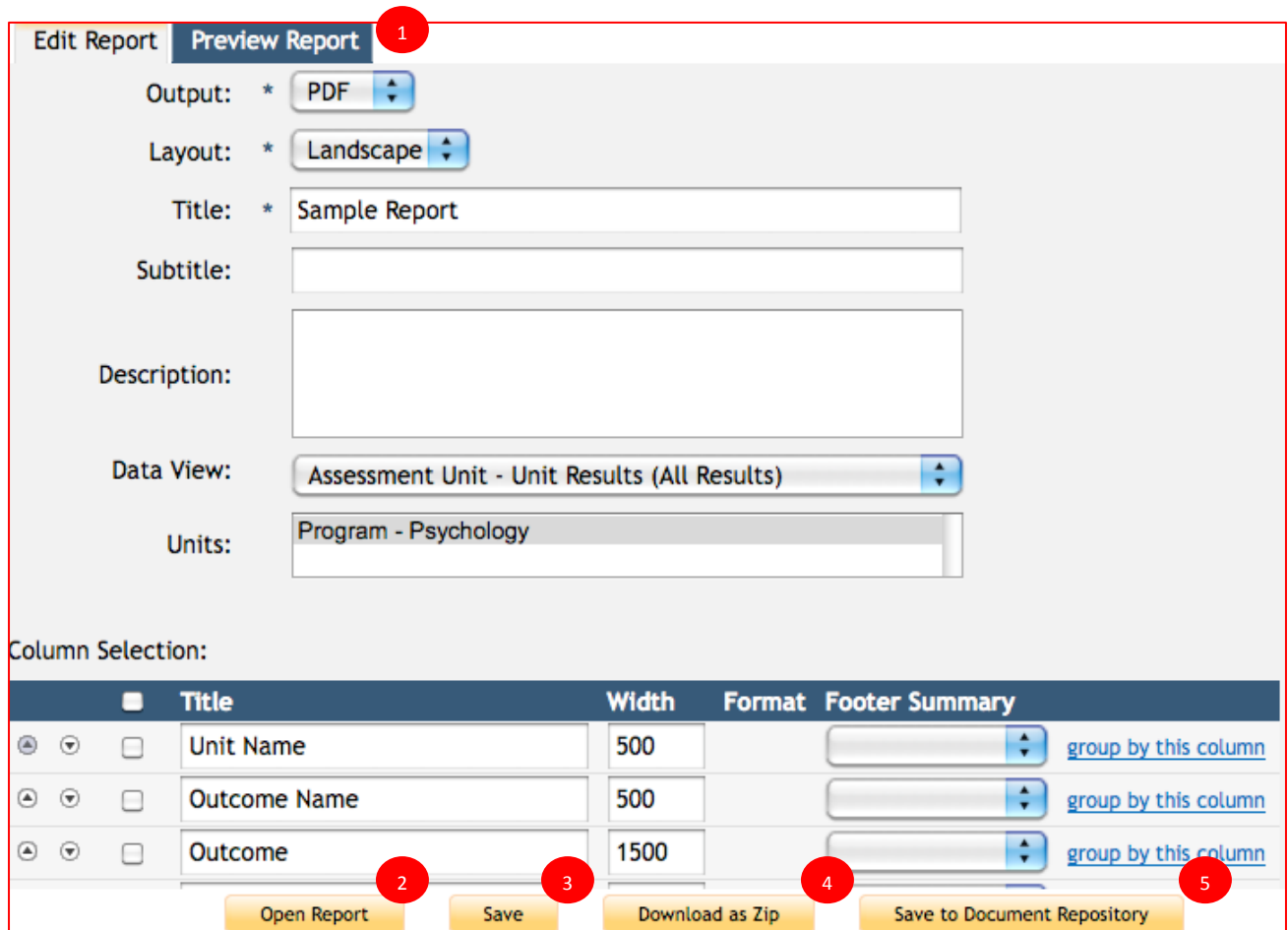
**Report that someone else created
(Restricted Access)**

Report Title	Description	Data View	Created By	
Report 1	Report Created by Admin	Administrative - Assignments	Johnson, Scott	run copy
Report 2	Report Created by User	Assessment Unit - Unit Summary	DeSante, Paul	edit run copy delete



6. Running the Report

When you are on the Edit Report screen, you have a few options when running the report. Please see the numbered bullets beneath that correspond to the numbered sections on the screenshot and that describe the options of running a report.

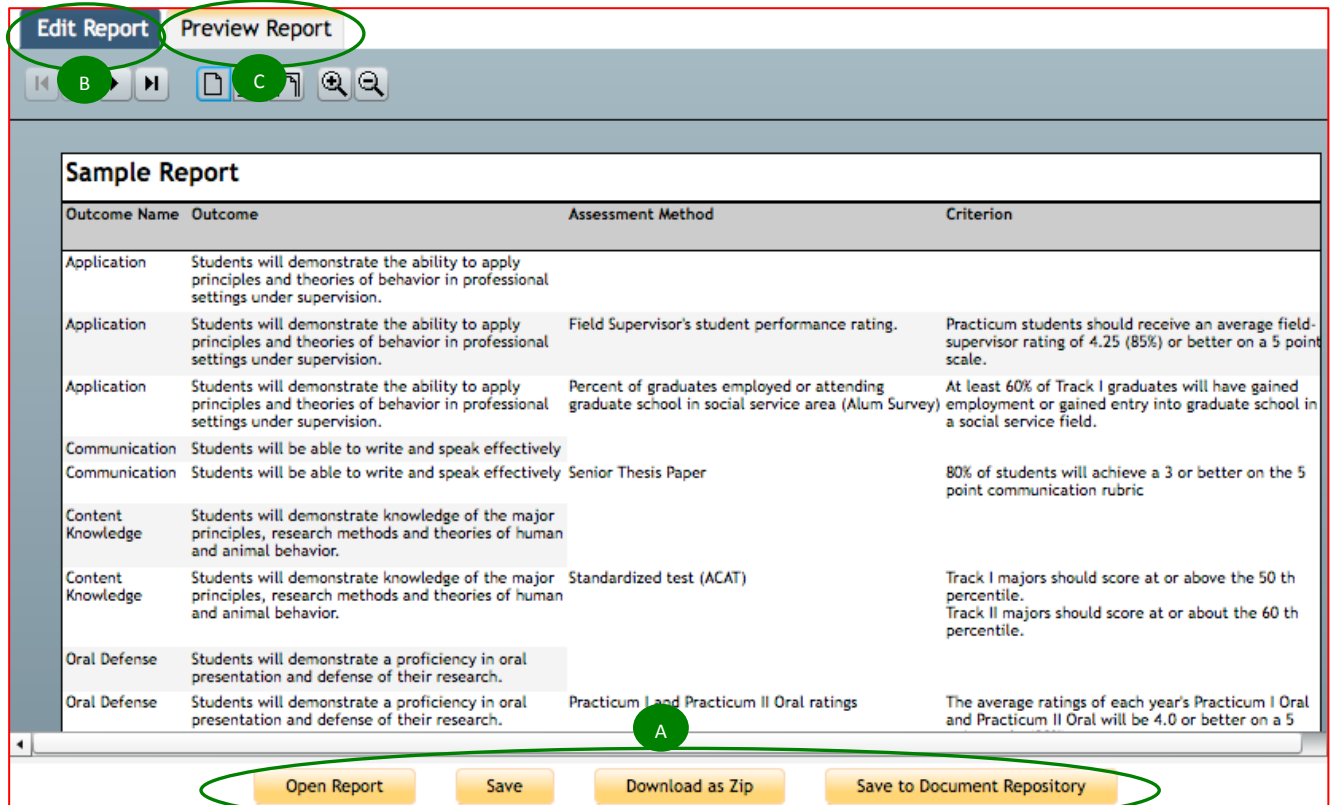


The screenshot shows the 'Edit Report' interface. At the top, there are two tabs: 'Edit Report' and 'Preview Report'. A red circle with the number '1' is placed over the 'Preview Report' tab. Below the tabs, there are several input fields and dropdown menus. A red circle with the number '2' is placed over the 'Open Report' button at the bottom. A red circle with the number '3' is placed over the 'Save' button. A red circle with the number '4' is placed over the 'Download as Zip' button. A red circle with the number '5' is placed over the 'Save to Document Repository' button. The 'Output' dropdown is set to 'PDF'. The 'Layout' dropdown is set to 'Landscape'. The 'Title' field contains 'Sample Report'. The 'Subtitle' field is empty. The 'Description' field is empty. The 'Data View' dropdown is set to 'Assessment Unit - Unit Results (All Results)'. The 'Units' dropdown is set to 'Program - Psychology'. Below these fields, there is a 'Column Selection' section with a table. The table has columns for 'Title', 'Width', 'Format', and 'Footer Summary'. The table contains three rows: 'Unit Name' (Width: 500), 'Outcome Name' (Width: 500), and 'Outcome' (Width: 1500). Each row has a 'group by this column' link in the 'Footer Summary' column.

Title	Width	Format	Footer Summary
Unit Name	500		group by this column
Outcome Name	500		group by this column
Outcome	1500		group by this column

- 1) Reports can be previewed while toggling between different parameters before final report generation. The preview will display only one page of the report at a time, giving the user a chance to quickly review both the format and some content before deciding whether or not to choose a further action for this report (Group A, below). For more information on these actions, please see bullets 2-5 below.

While in the Preview Report mode, users can also page through the report using the Paging Tools (B), and also resize the view on the screen using the View Tools (C).



Sample Report

Outcome Name	Outcome	Assessment Method	Criterion
Application	Students will demonstrate the ability to apply principles and theories of behavior in professional settings under supervision.		
Application	Students will demonstrate the ability to apply principles and theories of behavior in professional settings under supervision.	Field Supervisor's student performance rating.	Practicum students should receive an average field-supervisor rating of 4.25 (85%) or better on a 5 point scale.
Application	Students will demonstrate the ability to apply principles and theories of behavior in professional settings under supervision.	Percent of graduates employed or attending graduate school in social service area (Alum Survey)	At least 60% of Track I graduates will have gained employment or gained entry into graduate school in a social service field.
Communication	Students will be able to write and speak effectively		
Communication	Students will be able to write and speak effectively	Senior Thesis Paper	80% of students will achieve a 3 or better on the 5 point communication rubric
Content Knowledge	Students will demonstrate knowledge of the major principles, research methods and theories of human and animal behavior.		
Content Knowledge	Students will demonstrate knowledge of the major principles, research methods and theories of human and animal behavior.	Standardized test (ACAT)	Track I majors should score at or above the 50 th percentile. Track II majors should score at or about the 60 th percentile.
Oral Defense	Students will demonstrate a proficiency in oral presentation and defense of their research.		
Oral Defense	Students will demonstrate a proficiency in oral presentation and defense of their research.	Practicum I and Practicum II Oral ratings	The average ratings of each year's Practicum I Oral and Practicum II Oral will be 4.0 or better on a 5

Open Report Save Download as Zip Save to Document Repository

- 2) The Open Report button will open your report in the format chosen on the Edit Report page.
- 3) The Save button will save the report for future use.
- 4) Reports can be downloaded as Zip files. All required resources (report images, related documents, and linked reports) are also included in the Zip. The Zip can then be extracted and the complete report can be viewed from a PC, CD, or published to a website.
- 5) Reports can also be saved directly to the Document Repository and viewed just like any other document. When saved to the Document Repository, reports are saved as a Zip file to ensure all related data is included and saved. When viewed, the report will display in the format chosen on the Edit Report page. If desired, this saved report can be downloaded as a Zip file to your computer later from the Document Repository.