

When creating a new Assessment Unit within TracDat (post-configuration), it is important to realize that due to the dynamic capabilities of the application, the new Assessment Unit will be created with mostly default settings. As a result, it is necessary to configure the new Assessment Unit so that it has the correct menu tabs, list values, custom fields, reports, and other dynamically influenced features that your Institution is utilizing. This Checklist should serve as a guide to help you construct the new Assessment Unit to match your needs.

The information in this reference guide is presented according to the stock tabs and subheadings that originally come with TracDat. **Please be aware that your experience with TracDat may be slightly different than the information below due to the software's dynamic labeling feature and your specific institution's configuration of different tabs and features.**

CHECKLIST

1. **List Values** (Populate Drop-downs)
Default: No List Values-related drop-downs are populated
2. **Custom Fields** (Add Missing Fields)
Default: No Custom Fields are shown
3. **Navigation Settings** (Hide Tabs/Subheadings)
Default: All Tabs and Subheadings are viewable
4. **Report Settings** (Hide Reports)
Default: All Reports are available
5. **User Accounts** (Give Access to Users)
Default: No users (besides TD Admins) have access
6. **Reporting Unit** (Relate New Assessment Unit to Existing Reporting Unit)
Default: New Assessment Unit is not related to any Reporting Unit
7. **Courses** (Populate Course Listing – only for Academic Assessment Units)
Default: No Courses appear

1. List Values – Go To: Institution > Configuration > List Values

There are six default Lists in TracDat – five are commonly used to alter the drop-downs within a New Assessment Unit. Each List has multiple Values that must individually be added to the New Assessment Unit in order for them to show in the drop-down.

▶ **Assessment Method Category**

▶ **Objective Status**

▶ **Objective Type**

▶ **Observation Status**

▶ **Observation Type**

After selecting one of the above drop-down categories, **click edit next to each List Value** that you would like the new Assessment Unit to show in the category drop-down, **then check the box next to the new Assessment Unit**. **Click Save Changes** at the bottom.

<input checked="" type="checkbox"/>	New Assessment Unit
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2. Custom Fields – Go To: Institution > Configuration > Custom Fields

Each Institution may have different Custom Fields that need to be added to a newly created Assessment Unit. Below are a few examples of some of the more commonly used fields.

Mission Statement	Long Text	General Tab - Institution
Resources Needed	Long Text	Observations - Assessment Unit
Notes	Long Text	Observations - Assessment Unit

To add certain Custom Fields to the New Assessment Unit, **select ‘All’ from the Field Location** drop-down. Then **select Edit next to the field that you would like to add** to the New Assessment Unit. **Check the box to the left** of the New Assessment Unit to add that field to the Unit. To make the field required, check the box to the right of the Unit. **Click Save Changes** at the bottom.

<input checked="" type="checkbox"/>	New Assessment Unit
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Note: Keep in mind that there may be similar custom fields on multiple locations/ pages. Be sure to choose the correct one.

3. Navigation Settings – Go To: **Institution > Configuration > Application Settings**

To remove certain unused Tabs and Subheadings for the new Assessment Unit, **select Navigation Settings** from the drop-down. Then **select Edit next to the feature that you would like to remove** from the New Assessment Unit. **Check the box** next to the New Assessment Unit to remove that feature from the Unit. **Click Save Changes** at the bottom.

Data Tools > Questionnaires [edit](#)

<input checked="" type="checkbox"/>	New Assessment Unit
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4. Report Settings – Go To: **Institution > Configuration > Report Settings**

To remove certain unused Reports for the new Assessment Unit, **select Edit next to the report that you would like to remove**. Then **check the box** next to the New Assessment Unit to remove that report from the Unit. **Click Save Changes** at the bottom.

<input checked="" type="checkbox"/>	New Assessment Unit
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5. User Accounts – Go To: **Institution > User Accounts**

a) To **assign many personnel** to the New Assessment Unit **with Email Only access**:

From the personnel screen, **select the Mass Assign Personnel button** at the bottom of the screen. Then **select the New Assessment Unit from the Selected Unit drop-down**. Now **select the desired names** from the Personnel List on the left, using the Ctrl key to select multiple names, and then **click ‘Move’** to move them to the Assigned Personnel list on the right. **Clicking the Assign Personnel to Unit button** will make the users in the right column Email Only users for the Selected Unit.

Selected Unit:

Personnel:	Assigned Personnel:

[Move](#)

b) To **add users** to the New Assessment Unit **who will have Admin, User, or Reports Only access**:

From the personnel screen, **select Edit to the right of the personnel that you would like to add**. Then **check the box** to the left of the New Assessment Unit to add permission to the Unit for that person. Once that box is checked, a drop-down will appear to the right of the Assessment Unit name. Then select the type of permission that you would like the user to have for the new unit, and **click Save Changes** at the bottom.

<input checked="" type="checkbox"/>	New Assessment Unit	<input type="text" value="User"/>
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6. Reporting Unit – Go To: **Institution > Unit Definition > Reporting Units**

If the New Assessment Unit needs to be added to an existing Reporting Unit so that the Reporting Unit Goals can be related to the New Assessment Unit's Objectives, **select Edit next to the Reporting Unit** that should be related. Then **check the box** next to the New Assessment Unit to add that unit to the selected Reporting Unit.

<input checked="" type="checkbox"/>	New Assessment Unit
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7. Courses – Go To: **Institution > Configuration > Courses**

If the New Assessment Unit is an Academic Assessment Unit that has Courses, and it is desired to be able to related specific courses to certain Objectives, then courses must be assigned to the New Assessment Unit. Courses should first be uploaded into TracDat, either by adding them one at a time or by uploading a spreadsheet with a list of Course Names and Course Numbers.

To assign uploaded courses to the New Assessment Unit, **click the Assign Course to Unit button** at the bottom of the screen. This will bring up a search/assign page. **Select the New Assessment Unit** from the right drop-down and then **select your search criteria** from the left drop-down (this searches all existing uploaded courses in TracDat). Next, **enter a Search value** in the box to bring up the desired courses. Finally, **select the courses** to be assigned (using the Ctrl key to select multiple courses) and **click Assign >**. This will ensure the courses in the right column are assigned to the selected Assessment Unit.

Assign Course to Unit

Search by	Assessment Units
* Course Name starts with	* New Assessment Unit
Search value:	
<input type="text"/>	
<input type="button" value="Search"/>	
Filtered Courses:	Assigned Courses:
<input type="text"/>	<input type="text"/>
<input type="button" value="Assign >"/>	
<input type="button" value="< Remove"/>	