Improve 101: A Guide to Success

"Arrows and Bubbles"

I. Improve User Login Information

How do I login?

Use URL, sulross.tracdat.com, or locate Improve user login link of the Sul Ross State University Institutional Effectiveness Home Page. The username and password in your Sul Ross username and password. Once the user has logged in, the department should appear on the top center of

the screen. If a user has access to more than one department, click the "drop down" button located to the right of the existing department name for access.

II. Home Tab

A. Unit Planning Summary

Contains a Summary Table of all department Outcomes ◎ , Assessment Methods ▥ , Summary of Results, and Use of Results

B. Red Flag Indicators ⚑

Update for a particular section is needed; use mouse icon to scroll over each flag for explanation of what is needed

III. Assessment/Program Unit Tab

General Information

Lists Division, Department, Assessment Coordinator, and Statement of Purpose

A. Assignments Tab

What is this?

Assignments can be assigned to assessment coordinators on specific areas within the assessment information. If one assessment coordinator needs another assessment coordinator to enter data for a specific section, this can be assigned using "assignments". This feature is optional for all users.

B.   Annual Updates Tab (To be completed for 2019-2020)

What is this?

Contains Summary of Findings and/or Evidence of Improvements for each assessment cycle

How do I enter in my data?

Click the Arrow or "   " to open up Annual Updates from previous cycles

Click the   "Green Bubble" containing a "**+**" sign; Add Annual Update

Choose the appropriate assessment cycle from the drop down menu (ie, 2018-2019)

Click in the "Evidence of Improvement from the Previous Cycle" box to enter in new data

"Purple" message will appear with your "hint" of what data is needed

Finally, locate the big yellow button located at the top right of the screen to save the updated information.   Click on the drop down arrow and select "Save and Return", or "Save and Add New." The Return Button   is available next to the Save button to take you back to the previous screen with or without saving information.

C.   Personnel Tab
What is this?
Lists each assessment coordinator's credentials: Last Name, First Name, Title, Email, and Role

IV.   Unit Assessment Tab

A.   Plan Tab
What is this?

Gives summary of all outcomes, assessment methods, and targets. This section is locked down and cannot be revisited until 2023.

"Outcomes Overview"

Click the ▶ to open your department's Outcomes

Click each ▶ next to numbered Outcome to access Assessment Methods

Keep following the arrows. Click the ▶ next to "Assessment Method" to open all listed Assessment Methods (i.e. 1a, 1b, 2a, etc.…)

Continue using the arrows ▶, to open "Targets" for each particular method. *This is a summary section or overview, no edits or deletions can be made on this page. *

B.   Results Tab (To be completed for 2019-2020)

What is this?

New data will be entered in using this section. Areas to be updated include, "*Assessment of Results/ Summary of Findings*" and "*Use of Results/ Action Plan*"

How do I show all previous data?

Beginning at the top, outcome 1, click your ▶ arrow to open up the assessment methods for the first outcome, 1a. and 1b. Next click the ▶ arrow located next to each assessment method, this opens up the previous assessment cycle's target and use of results. A checkered flag 🏁 next to the assessment year, and the previous cycle's target results should appear. Finally, click the ▶ button to open up the remaining piece of information, "Use of Results". Now that you have all your information listed, it's time to enter in new data!!

How do I enter in new data for my "Summary of Finding's" Section?

Locate and click the 🟢 containing a "**+**" at the top of the screen straight across from the assessment method you want to enter in data for. Example…

Method 1a.   containing a "**+**", add "Summary of Findings. →→→→→→→→→→→→→→→→→→→→→→→→→→→→→→→→→→ 🟢

The next screen, will list the Outcome ☉, Assessment Method 📊, and Target you are entering in new data for. The * Result Date will automatically fill in the date the information is being entered in. Do not alter the result date. Click in the *Summary of Findings box. A "purple" pop up will appear with a helpful tip on what type of information is needed. Use the *Summary of Findings text box to enter in new data. (Hint- you can copy and paste your information into the text box from a word doc.)

Next, choose your *Reporting Period from the drop down menu. Finally, use the *Conclusion drop down box for the target to select "met" or "not met" or "not applicable". Use the yellow "Save" 🟨 button with options to save the updated information. All fields must be entered in before the data can be saved and a new page opened.

How do I know my "Summary of Findings" has been updated and saved?

Look for the checkered flag 🏁, the updated assessment year, the target, and results listed in the text box below.

How do I enter in new data for my "Use of Results" Section?

Locate and click the 🟢 containing a "**+**" directly across from the "Use of Results" title, the mouse icon will show "Add Use of Results". The next page will list the Outcome, Assessment Method, Target, and the updated Summary of Findings you are entering in new data for. The *Use of Results date will automatically fill in the date the new information is being entered in. Next, click in the text box. A "purple" pop up will appear with a helpful tip on what type of information is needed. (Hint- you can copy and paste your information into the text box from a word doc). Use the yellow "Save" 🟨 button with options to save the updated information.

What if I make a mistake…can I make edits?

Yes, edits can be made to the "Summary of Findings" section and "Use of Results" section. Locate the "Edit" button ✏️. There is a separate ✏️ button for the "Summary of Findings" and "Use of Results" sections.

Can I delete and start over?

Yes, locate the delete button, 🗑️. The "Summary of Findings" and "Use of Results" have separate delete buttons.

What is this 🔧 **used for?**

There are two options for this symbol. The first is to create an "assignment". Refer to the "assignments section". This feature is optional to users.

The next option is for "Related Documents." This section is used to relate specific documents to a specific assessment area. This feature is optional to users.

V. 📋 Reports Tab

A. Standard Reports

What is this?

This section allows the assessment coordinator to access their department assessment as a PDF, HTML, or WORD DOC. The document can then be printed or saved.

How do I print or save?

Click on the link for "Standard Reports", choose "Assessment Unit Four Column" (this prints the full assessment report). The next screen, choose which *Format you want the document to print in. Click the drop down for PDF, HTML, or WORD DOC. Next, under Layout choose the reporting period needed. Next to reporting period click in the empty box, a drop down containing assessment cycles will appear (i.e. 2019-2020, 2020-2021, etc.). Next, under Options locate the last option, "Include Annual Update", check the box to the right (this will include the Annual Update Section or "Evidence of

Improvement"). Finally, click the yellow ▢ "open report" button located at the top right of the screen. The report will open up in a new tab with the chosen parameters. To return to the previous screen, choose the ⬏ "return button".

VI.   📁 Documents Tab

A.   Document Repository
What is this?

This section allows an assessment coordinator to store supporting documentation for the reports.

How do I store my documents?

Click on "document repository". Locate the department folder, click the arrow ▶, a "general" folder 🗁 will appear. Scroll the mouse icon to the right of the word "general" and a drop down arrow ⬇ will appear. Click the drop down arrow for more options. These options include, Rename the Folder, Share the Folder within the Cloud, Add a New Folder within the existing Folder, or Delete the Folder. Please notice a drop down option ⬇ is located just right of the department folder as well. This option includes adding a new folder. Now that you can open up all the folders, let's add some documents. First, locate the green bubble 🟢 containing a "**+**", directly across →→→ from the "Document Repository" title. Click the "bubble". A pop up appears giving the user the option to choose files or documents from their desk top. To choose files click in the "Files" box. Once the files have been selected, click the "save" ▢ button. To cancel choose the gray "cancel" button ▬ next to the save button.

VII.   Improve Extras

What do these symbols mean?

A. Click to access embedded link for videos

B. Click for additional helpful hints or instructions

C. Click for a department user audit log

D. Click for page filter

E. Click for system notifications or alerts

F. Click for profile options

VIII.   What if I need help?

Please feel free to contact us about any questions or concerns you have.

**Administrative Non- Academic Units contact Libby Newman, edalton@sulross.edu.
Ext. 8239, BAB 202**

**Academic Programs contact Dr. Jeanne Qvarnstrom, jqvarnstrom@sulross.edu, Ext.
8395, BAB 202**

IX.   Checklist for Your Assessment Success

A. Complete a "result" for each "assessment method" and save

B. Complete a "use of results" for each "result" and save

C. Double check the "home page" that no red flags are present

D. *Complete the "annual update" section for the 2019-2020 cycle and save*

Congratulations on the completion of your

2019-2020 Annual Assessment Report!! You did it!!!