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# INSTRUCTIONS for PLANNING RECOMMENDATIONS in TracDat

## *Unit Level*

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# INTRODUCTION TO TRACDAT

## Background

TracDat by Nuventive is a web-based information collection, tracking, and reporting system used for managing outcomes assessments, program reviews, and planning recommendations. At El Camino College (ECC), TracDat has three main modules: 1) Student Learning Outcomes (SLOs); 2) Service Area Outcomes (SAOs); and 3) Program Review and Planning (PRP). Only the PRP module is covered by these instructions.

The PRP module houses Program Review reports and supports the Annual Planning process through Recommendations linked from Program Review to annual budget allocations. Linking program review, planning, and budgeting is critical to successful accreditation and institutional effectiveness.

This guide will lead you through the complete cycle of annual planning in the PRP module.

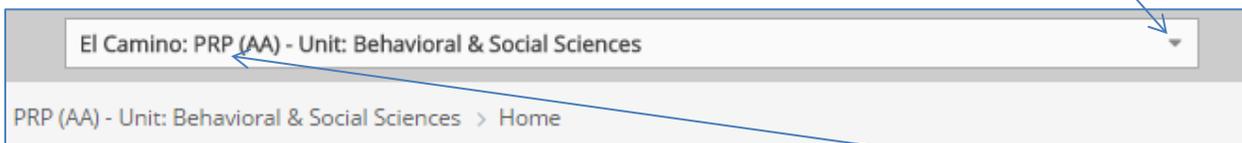
## Logging into TracDat

**ECC Home Page** (*Google Chrome* has the best functionality with **TracDat**, as little items may not work with the other browsers, such as the drag-option to make text boxes larger.)

Once at the **ECC Home Page**, go to the **A-Z Index** at the top of the page and click on “T”, then click on **TracDat**. [You can also access TracDat by clicking here.](#)

Log into **TracDat** with your regular college *Username* and *Password*.

At the top of the TracDat view at all times, there is a drop-down menu which lists all the units to which you have access. Click on the drop-down carrot and choose the unit you wish to open. The last unit you worked on will display the next time you log in.



To work on *Program Review* and/or *Planning Recommendations*, choose the **PRP** module.

 **Help Text icon:** Throughout the software, you may click on the Help Text icon (the blue question mark) to the right of any box if you need a description of what kind of information is to be entered. These Help Text icons also offer tips and guidance, such as the proper formatting of Recommendation names.

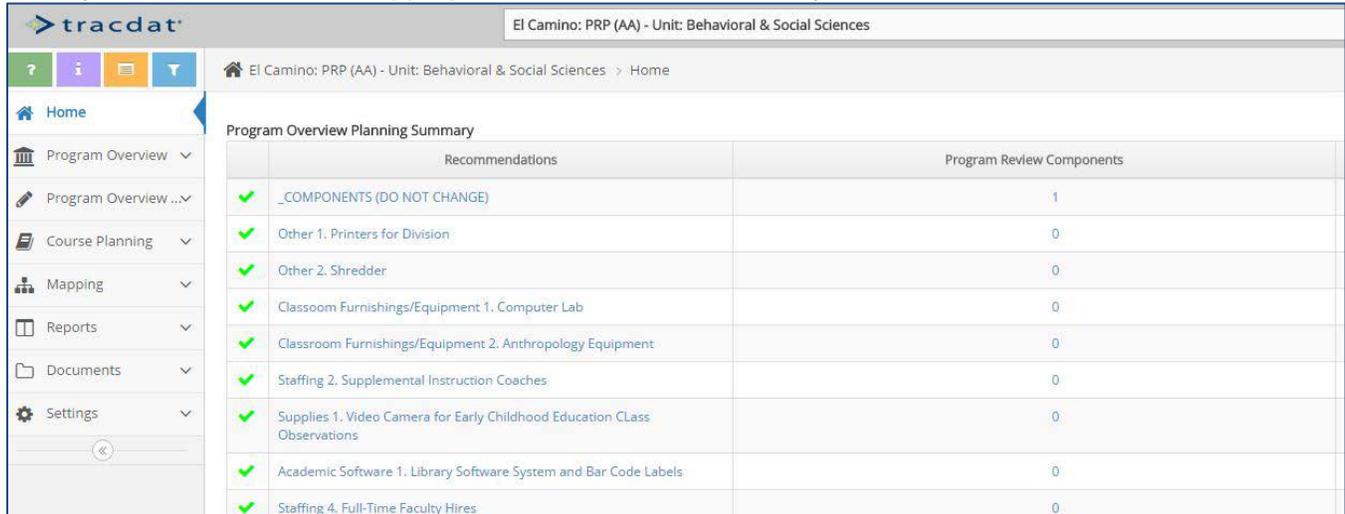
## Definitions:

“unit” vs. “Unit” – TracDat uses the word “unit” to refer to any program, unit or area-level section of any module, while “Unit” (capitalized) refers to a planning level used for divisions or programs that report directly to an Area. This guide sheet follows this convention.

For other definitions and an explanation of the annual planning process, please see [Administrative Procedure 3250, Institutional Planning, Section 4.E. Annual Planning & Budget](#).

## Recommendations

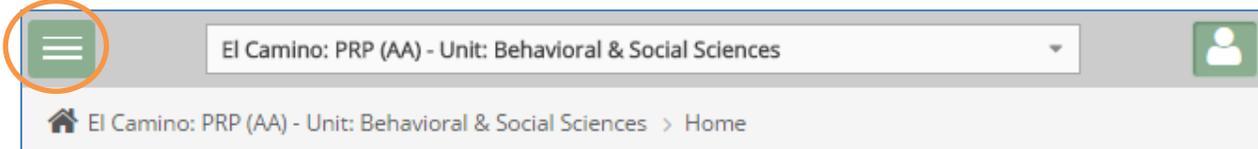
Once you have selected the appropriate Unit or Area for PRP, you will see the home screen.



The screenshot shows the TracDat interface for 'El Camino: PRP (AA) - Unit: Behavioral & Social Sciences'. The main content area displays a 'Program Overview Planning Summary' table with two columns: 'Recommendations' and 'Program Review Components'. The table lists various components with green checkmarks in the 'Recommendations' column and numerical values in the 'Program Review Components' column.

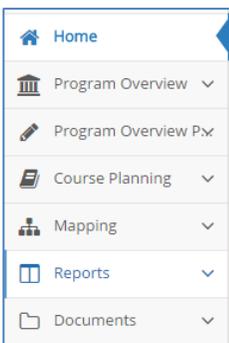
| Recommendations   | Program Review Components |
|---|---------------------------|
| ✓ _COMPONENTS (DO NOT CHANGE)   | 1                         |
| ✓ Other 1. Printers for Division  | 0                         |
| ✓ Other 2. Shredder   | 0                         |
| ✓ Classroom Furnishings/Equipment 1. Computer Lab                           | 0                         |
| ✓ Classroom Furnishings/Equipment 2. Anthropology Equipment                 | 0                         |
| ✓ Staffing 2. Supplemental Instruction Coaches                              | 0                         |
| ✓ Supplies 1. Video Camera for Early Childhood Education Class Observations | 0                         |
| ✓ Academic Software 1. Library Software System and Bar Code Labels          | 0                         |
| ✓ Staffing 4. Full-Time Faculty Hires                                       | 0                         |

If your browser window is smaller or on a mobile device, your view might look like this. Note the menu button (circled) where you can access the left-hand menu options by clicking.



After selecting your Unit, it will always open at the Home screen (🏠 Home). If you ever get lost in TracDat, just “go Home” by clicking on the house icon.

## TracDat Menu



You can navigate to different functions in PRP by way of the TracDat menu.

The **Home** screen contains a summary of your Unit's PRP sections. **COMPONENTS (DO NOT CHANGE)** is where all sections (or “components”) of the Program Review are located. This bar should always remain at the top. Entering Program Reviews into the Component boxes is discussed in separate guidelines. The Adjustments and Follow-Up links on the Home page are currently inactive in PRP. Development of the Annual Evaluations link is in progress and will be covered in next year's training.

Some views include the **Program Overview** menu with the building icon (🏠). This menu includes space for a general program description (optional), Assignments (currently not used), and Personnel. Click on the Personnel page to view all those

who have access to the unit that you are in.

All views include the **Program Overview** Planning menu with the pencil (✎). This menu includes Recommendation Updates (in development), **Program Review & Planning**, and Annual Evaluations. You'll spend most of your time in TracDat interacting with the Program Review & Planning page.

**Reports** is where you can generate preset Standard or Ad Hoc reports. Depending on the report, you will be guided to either of these sub-links. You can generate reports of your Program Review or Annual Plan, or download an Excel version of your plan for local use.

**Documents** is where you can store any file that is related to your Program Review or Annual Plan. Save these to the **Document Repository**.

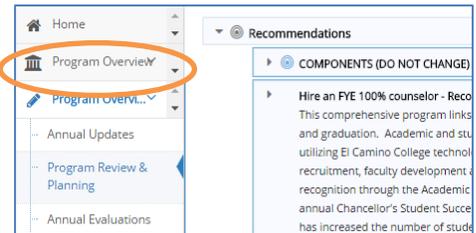
All of these processes are explained in this guide. **Course Planning** and **Mapping** are not used.

## Updating Older Recommendations and Adding New Recommendations

Each year, you'll have the opportunity to set goals to achieve and to request funding for these goals (if needed), as well as to evaluate the goals you have set the previous years. Set and update annual goals in PRP by way of Recommendations in **Program Review & Planning**.

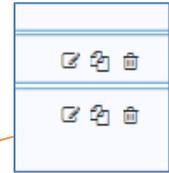
Click on  **Program Overview** from the left menu, and then **Program Review & Planning**. This is where you will be entering and updating your goals.

The next section will detail the updating and archiving process.



## UPDATING OLDER RECOMMENDATIONS

Throughout the annual planning process, you will need to update aspects of your recommendations. Existing recommendations should be updated before adding new plan information. Updating involves the following: adding in a completion date, annual evaluation information, and an annual evaluation date, if applicable. Recommendations are often updated in July, but can be done throughout the Fall term.



On the **Program Review & Planning** page, click on the **Edit button** to edit a previously-entered Recommendation. You can edit any field at any time, as needed. This manual is organized by implementation timeline to detail the most common fields that you will need to edit for each fiscal year.

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### CHECKLIST: UPDATING & ARCHIVING OLD RECOMMENDATIONS

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#### Summer/Fall (July - Fall): Update and Archive Old Recommendations

Prior to entering new recommendations for the new fiscal year, please update and archive old recommendations at the close of the implementation year by doing the following:

- 1. Recommendation Status (for both 2017-18 and 2018-19 Recommendations):** Update the final status of each recommendation
- 2. Input/Last Revised Date (for both 2017-18 and 2018-19 Recommendations)**
- 3. Completion Date (for 2017-18 Recommendations ONLY)**
- 4. Change Funding Status**
- 5. Annual Evaluation Date (for 2017-18 Recommendations ONLY):** Add the date that the recommendation is evaluated
- 6. Annual Evaluation (for 2017-18 Recommendations ONLY):** Evaluate the impact of the recommendation being funded. Evaluation should answer the following questions:
  - Was it funded?
  - Was it implemented (partially or fully)?
  - What were you able to do as a result of the funding or implementation?
  - What outcomes can you measure as a result of implementation? Were the Expected Outcomes achieved?
  - What should be done differently to ensure institutional effectiveness (*optional*)?
- 7. Archive Old Recommendations (for 2017-18 Recommendations ONLY)**
- 8. Delete Old Recommendations (for 2017-18 Recommendations ONLY) (*Optional*)**

### 2017-18 Recommendations: Closing the Loop

Now that 2017-18 has drawn to a close, it's time to look back and report on how things went for all funded or approved items. The last stage of the annual planning process is to **Update, Evaluate and Archive your completed plan**. This ensures that we “close the loop,” assess the impact of funded items on institutional improvement, and properly store the closing year’s plan.

**UPDATE** your recommendations and **ADD** your evaluations. The fields that you will need to edit to close the loop for 2017-2018 recommendations are in the table below:

| Field                   | Detail   |
|-------------------------|--|
| Recommendation Status   | Please select from the drop-down menu (Abandoned, Completed, In Progress/Funded, Not Started, Partially Completed; please see details of each category on page 11)   |
| Input/Last Revised Date | Input revised date any time a status field is updated (Recommendation Status or Funding Status)  |
| Funding Status          | If you haven't already, please select from the drop-down menu (N/A—no additional funds needed, On Hold, Proposed, Forwarded to College Plan, Forwarded to Unit Plan, Forwarded to Area Plan, Not Funded, Partially Funded, Funded).  |
| Annual Evaluation       | Please evaluate the impact of the recommendation being funded. Evaluation should answer the following questions: <ul style="list-style-type: none"> <li>• <b>Was it funded?</b></li> <li>• <b>Was it implemented (partially or fully)?</b></li> <li>• <b>What were you able to do as a result of the funding or implementation? Be specific</b> (e.g., month position was filled; when and where software was installed; action taken)</li> <li>• <b>What outcomes can you measure as a result of implementation? Were the Expected Outcomes achieved?</b> (e.g., additional sections added; maintained size of program to meet demand; able to provide sufficient stock of equipment/supplies for classrooms; able to increase services to students by providing a series of professional YouTube videos)</li> <li>• <b>What should be done differently to ensure institutional effectiveness (optional)?</b> (e.g., The software overpowered the Wi-Fi resources of the classroom—need to enhance Wi-Fi for it to work properly or try a different product; few students are accessing the YouTubes so far—may need more advertising)</li> </ul> |
| Evaluation Date         | Enter the date the annual evaluation was entered   |

An example is provided below:

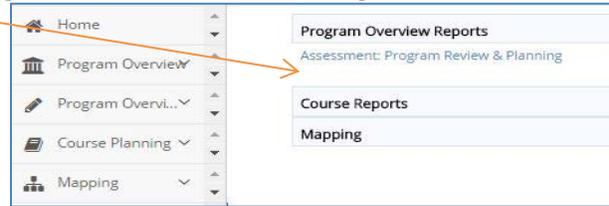
The screenshot shows a form with the following fields and values:

- \* Funding Status:** A dropdown menu set to "Funded".
- \* Funding Type:** A dropdown menu set to "One-Time Funds Needed (Augmentation)".
- Annual Evaluation Date:** A text input field containing "07/16/2018".
- Annual Evaluation:** A text input field containing "30 more students could be served by the Tech Center each day after the new widgets were installed."

Start by referring back to your “Rationale & Expected Outcome” for each recommendation to ensure that the evaluation is in sync with the Expected Outcomes. Emphasis should be placed on how students or the college benefited, where applicable.

Also, please be sure that you select **2017-2018** as the **Implementation Timeline**. This will ensure that the archive will ONLY store your 2017-2018 recommendations.

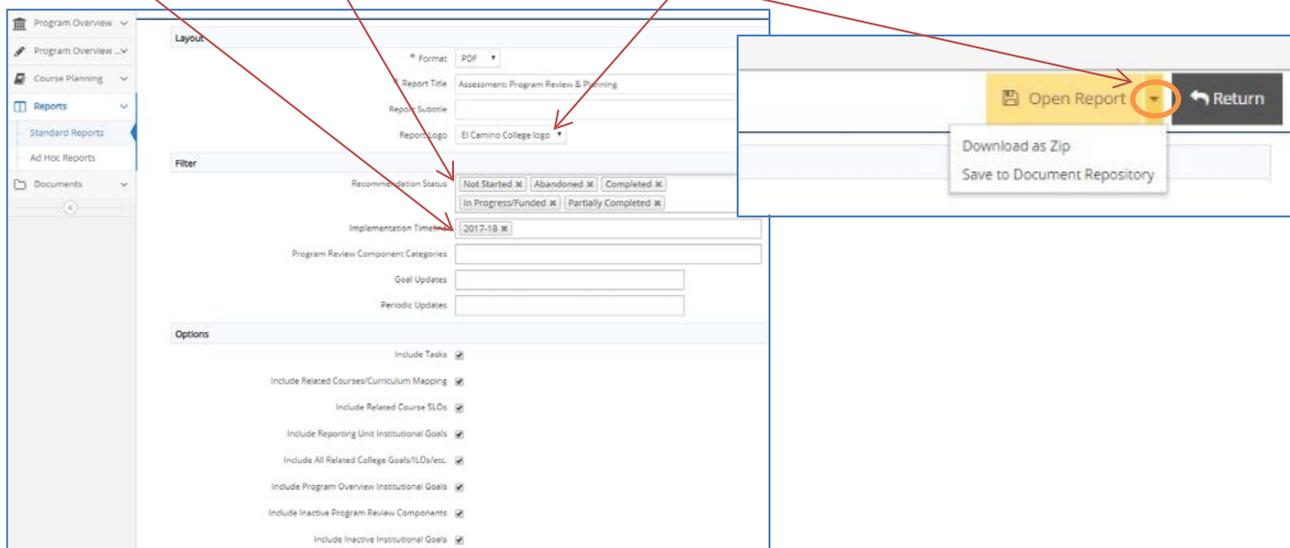
**ARCHIVE your recommendations:** Once the 2017-2018 recommendations have been updated and evaluated, archive the existing recommendations by going to **Reports**, then **Standard Reports** in the left-hand navigation. Then select **Assessment: Program Review and Planning**.



You will be given choices of Layout (and titles), Filters, and Options for the report. For Layout, replace the existing title (“Assessment...”) with **Archive of 2017-18**. Select a college logo for your report.

Under Filter, select “Abandoned, Completed, In Progress/Funded, and Partially Completed” for Recommendation Status. You may also include “Not Started” to save a record of unfunded Recommendations. To select all statuses more quickly, hold down the Ctrl key while selecting.

Select **2017-2018** for Implementation Timeline. Leave other fields blank. Under Options, check all boxes, then click the triangle next to the **Open Report**.



Save the report to the **Document Repository**.

**DELETE your 2017-2018 recommendations** (optional): Once your plan is properly updated, evaluated, and archived, you can delete your recommendations to keep your main recommendations list page shorter/cleaner. Your recs are safely stored in your archived document.

### 2018-2019 Recommendations: Updating Funding Status

Once you find out whether or not your 2018-2019 recommendations have been funded, you will need to edit them to reflect the change in funding status.

| Field                   | Detail  |
|-------------------------|---|
| Recommendation Status   | Please select from the drop-down menu (Abandoned, Completed, In Progress/Funded, Not Started, Partially Completed; please see details of each category on p. 6)   |
| Input/Last Revised Date | Input revised date any time a status field is updated (Recommendation Status or Funding Status)   |
| Funding Status          | Please select from the drop-down menu (N/A (no additional funds needed), On Hold, Proposed, Forwarded to College Plan, Forwarded to Unit Plan, Forwarded to Area Plan, Not Funded, Partially Funded, Funded). |

If you are carrying over an old recommendation into the new plan, choose the copy option described in the next section, and then save the copy with the new plan year and details. *By keeping the older recommendation on the current plan, you can demonstrate the history of the recommendation.*

## ADDING NEW RECOMMENDATIONS

Once you have updated and archived older recommendations, you are ready to add new recommendations for 2019-2020. A checklist is included to help ensure that you have completed the required field to update your older recommendations.

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### CHECKLIST: PLANNING & ENTERING NEW RECOMMENDATIONS

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#### Fall (September – December): Enter New Recommendations

- 1. Add Recommendation:** Add new (+) or copy recommendation from the previous year (p. 9).
- 2. Recommendation Name:** Name each recommendation using the naming convention: [Unit-Abbrev] [Program-Abbrev] [Fiscal-Year] "Rec" [Unique Number] (e.g., BSS HDEV 2019-20 Rec 1)
- 3. Recommendation:** Please limit the description of the goal to one to two sentences; more detail can be provided in **Rationale & Expected Outcome**.
- 4. Recommendation Status:** Select a status. Begin with Not Started.
- 5. Implementation Timeline:** Select the appropriate *Fiscal* Year (e.g., 2019-20)
- 6. Input/Last Revised Date:** Today's date; revise this date when changes are made. Leave Completion Date blank.
- 7. Origin of Recommendation:** Select the source of your recommendation (Program Review, Emerging Need, Other). *Reference appropriate Program Review sections where applicable once you have saved recommendation (See item 18 below).*
- 8. Expense Category:** Select an expense category that most closely relates to your Recommendation. Select 'Other' if the recommendation needs no funding.
- 9. Unit Rank:** Select priority number for the recommendation within the given expense category.
- 10. Rationale & Expected Outcome:** Briefly describe the rationale for your request; sketch out an evaluation plan (see p. 11 for detailed instruction)
- 11. Anticipated Cost:** Use whole numbers (integers) only. Enter '0' if no cost is involved.
- 12. Primary SI Supporting Recommendation:** Strategic Initiative that is related to the recommendation. More detail in [Board Policy 1200, District Mission and Strategic Plan](#).
- 13. Any Impact on other Programs, Areas or Units?** Mark **Yes** if recommendation has impact on other programs, areas or units.
- 14. List impacted areas and describe potential impact:** If 'Yes' was selected in previous prompt, list all programs that would be potentially impacted by the recommendation and briefly describe potential impact.
- 15. Code Req, Mandate, Health & Safety, Tech Need:** Describe any implications for your recommendation related to these (optional)
- 16. Funding Status/Funding Type:** Set Funding Status to Proposed or N/A. Indicate Funding Type.
- 17. Save Recommendation**

- ❑ **18. Link Recommendation to Program Review Component** (if **Origin of Recommendation** is Program Review): see pp. 11-13 for instruction
- ❑ **19. Save and Submit Your 2019-2020 Recommendations:** see p. 13 for instructions

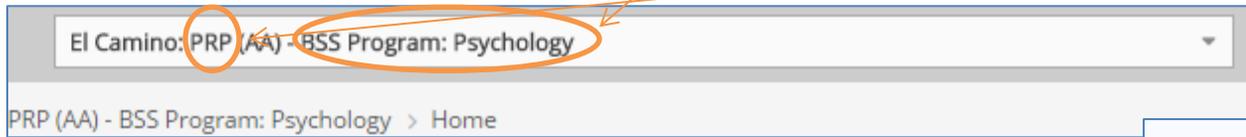
*2019-2020 Recommendations: Adding New Recommendations*

You can add new recommendations in two ways: **COPY** recommendations from the Program level or **ADD** new recommendations.

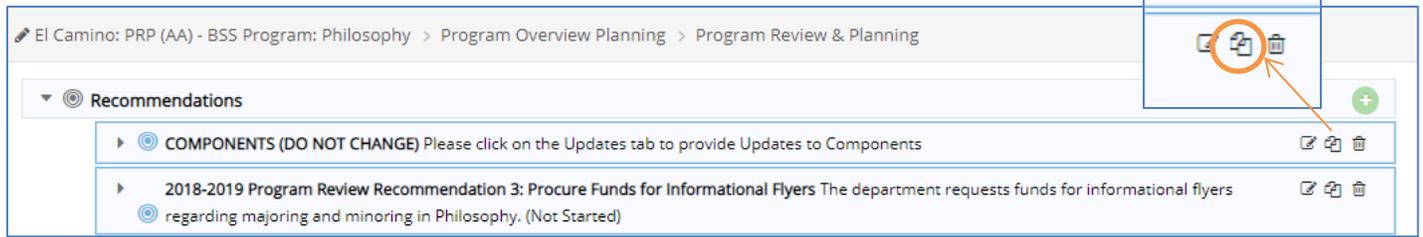
**1. Copying Recommendations**

**You can copy** recommendations from the Program level directly to the Unit level.

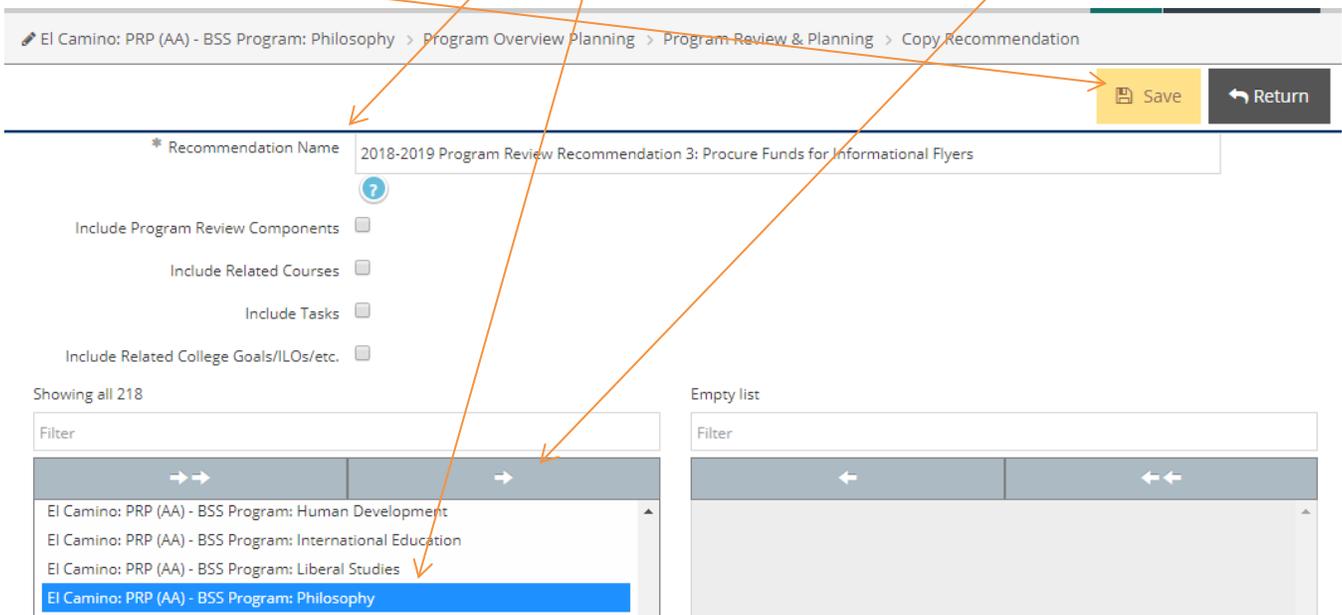
To do this, you will need to select the appropriate program for PRP.



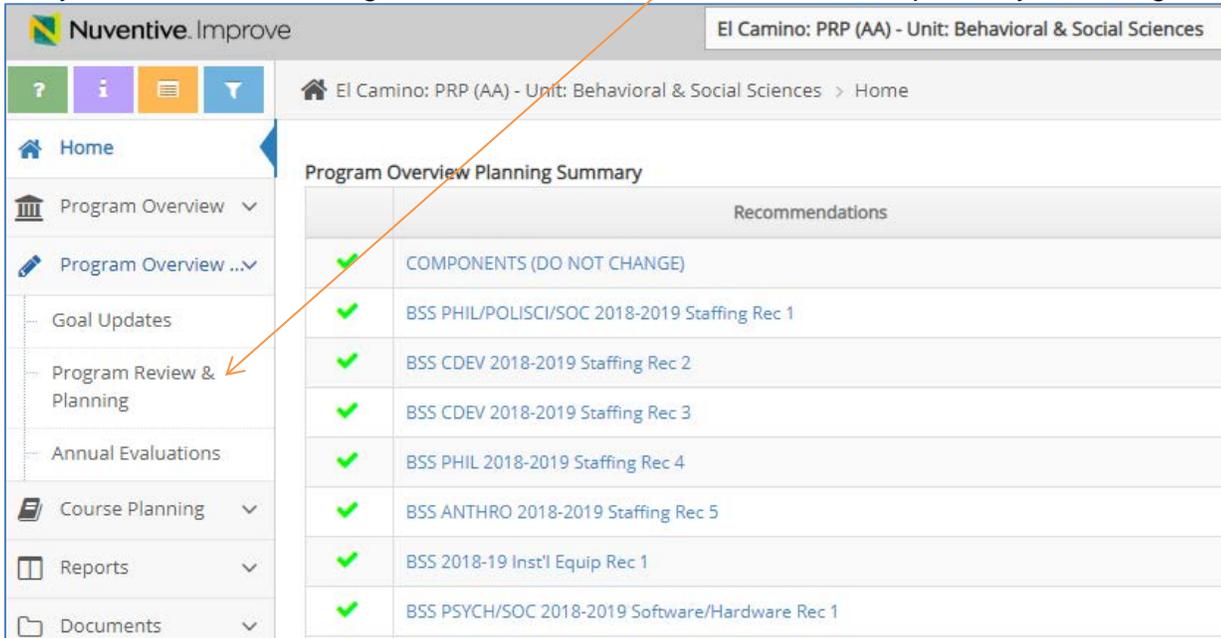
Select the Program recommendation that you would like to copy to the Unit level...



... And **Paste** into your unit. Click on the unit from the left-hand list and use the single arrow to move it over. Add the Unit abbreviation in the recommendation name if it is not already included. And check off all the boxes to ensure all components of the recommendations are copied over to the Unit level. Click **Save**.

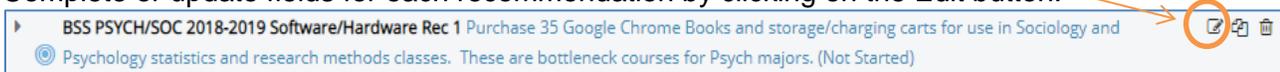


The copied recommendation will appear at the bottom of your recommendation list on the Unit home page. Go back to your Unit PRP, then select Program Overview (then Program Review and Planning) and you will be able to change the order of recommendations and complete any remaining fields.



To move the Recommendation up to the top, click and hold the blue bull's eye (👁) to the left of the Recommendation and move it up or down.

Complete or update fields for each recommendation by clicking on the Edit button.



One of the fields that will need to be updated is the Unit Rank. Select your determined ranking *within the expense category*. Maintain the Program Rank information within the expense category.

## 2. Adding and Entering New Recommendations

Click on the  button to the far right of **Recommendations** to add a new goal.



The following fields appear on the Add Recommendation or Edit Recommendation pages. An asterisk(\*) by a field denotes that it is required.

**Recommendation Name:** Use the following naming convention

[Unit-Abbrev.] [Program-Name (if applicable)] [Fiscal-Year] "Rec" [Unique-Number]

Examples:

*BSS HDEV 2019-20 Rec 1*  
*ITS 2019-20 Rec 1*  
*FPS 2019-20 Rec 3*

Clear, concise and consistent Names are key to the planning process as recommendations migrate up to the College Plan.

**AVOID** Recommendation Names that:

- List the requested item as part of the Rec Name. Save this for the **Recommendation** box below.
- Include references to Program Review – this linkage will be handled in other ways
- Use lengthy phrases

Unit Abbrev examples:

- A&R
- BSS
- BUSI
- COUNS
- FINE
- FPS
- GRANTS
- HEAL
- HUMA
- IRP
- ITEC
- ITS
- LLR
- MATH
- NSC

**Recommendation:** Input the Recommendation text here (e.g., Hire full-time faculty in Painting/Drawing, or Purchase MS-Widget to support graduation efforts). Keep the content brief. Save details for the Rationale & Expected Outcome section.

**Recommendation Status:** Select the appropriate status. Begin with **Not Started**. Other options include Abandoned, Completed, In Progress/Funded, and Partially Completed.

- **Abandoned:** A previously-created recommendation that is no longer needed
- **Completed:** A recommendation has been fulfilled (e.g., purchased, hired, finished, etc)
- **In Progress/Funded:** A recommendation that is currently moving forward to completion
- **Not Started:** A Recommendation that is proposed but has not been funded or started
- **Partially Completed:** A recommendation that only received partial funding or was not fully completed in the current Implementation Timeline (fiscal year)

**Implementation Timeline:** Select the academic or fiscal year for anticipated/desired implementation of the recommendation. Non-timeline information from old recommendations should be removed.

**Input/Last Revised Date:** Use the calendar feature to select the input date for the recommendation. If a recommendation is revised, select a date for the latest revision. Must precede the Completion Date.

**Completion Date:** Leave this field blank until the recommendation is completed. Once the recommendation is completed, use the calendar feature to select a completion date.

**Origin or Type of Recommendation:** Indicate whether the source of the recommendation is from a Program Review, is an Emerging Need, or Other. **Note:** If "Program Review" is selected, you must link a PR component to the Recommendation (see below).

**Expense Category:** Choose an expense category that most closely relates to your recommendation. Select Other for recommendations that need no funding or already have an external funding source.

**Unit Rank:** Select the priority for this recommendation within the given expense category.

**Program Rank** (if applicable): Retain the priority within the given expense category assigned by the Program.

**Rationale & Expected Outcome:** Provide a BRIEF rationale for the recommendation (e.g. "3 pending retirements necessitate hiring 3 new faculty"). Make clear the outcome of the recommendation: How will you know when the Recommendation is achieved? What are the expected student or institutional outcomes as a result of implementing this recommendation? Be specific so that completion of recommendation can be clearly assessed. Reference appropriate Program Review sections, where applicable. This section can be the basis of your future evaluation of the recommendation.

**Anticipated Cost:** Input anticipated cost for this recommendation. Use numbers only (e.g., 86000 or 86000.00), no commas. Enter 0 if there is no cost.

**Primary SI Supporting Recommendation:** Select the primary Strategic Initiative (SI) that supports this Recommendation.

**Any impact on other Programs, Areas, or Units?:** Does this recommendation have any impact on other Programs, Areas, or Units? Select 'Yes' or 'No'. If 'Yes', identify those impacted areas in the below text box. Exclude HR when Staffing is the Expense Category, as this is assumed.

**List impacted areas and describe potential impact:** If you answered 'Yes' to the above prompt, list any programs potentially impacted by this recommendation and briefly describe potential impact.

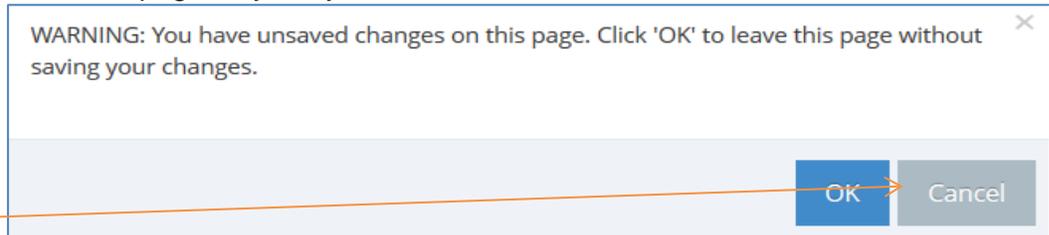
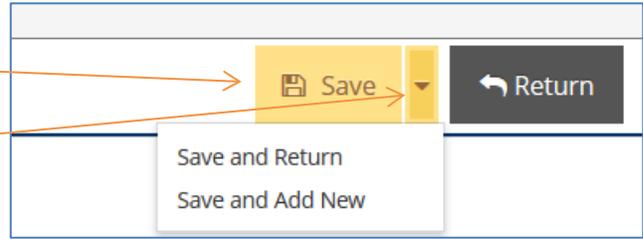
**Funding Status:** Select the appropriate status for funding of this recommendation. Begin with **Proposed**. Keep the Funding Status updated throughout the annual planning process. If no funding is needed, select N/A.

**Funding Type:** Select the appropriate funding type for this Recommendation.

Complete **Annual Evaluation Date** and **Annual Evaluation** after the close of the year. Instructions to complete this portion are found on pp. 4-7.

### Saving a Recommendation

After completing all necessary fields for your new recommendation, you must **Save** it. Click the gold **Save** button in the upper right corner before leaving the page. You may select the carrot on the Save button to either Save and Return to your list of Recommendations or Save and Add a New Recommendation. Click the **Return** button to go back to your Recommendations page. If you try to return without saving changes, the system will prompt you to confirm this. To go back and save your changes, click Cancel.



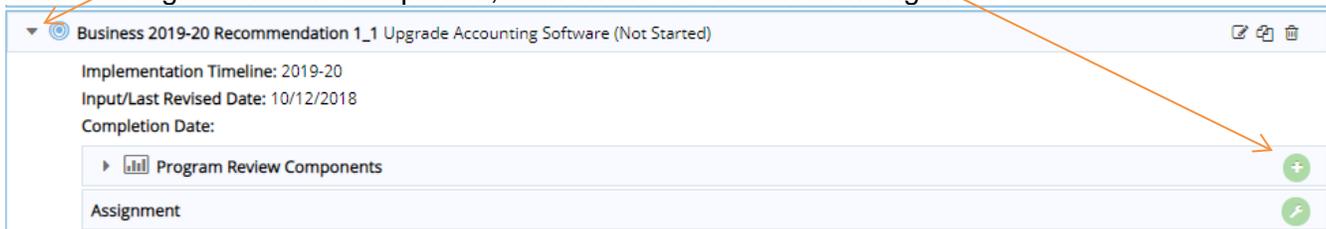
### Linking a Program Review Component to a Recommendation

If the Origin of Recommendation is your Program Review, you will need to link the relevant component of your Program Review to the Recommendation using the following process. *For Units with Programs reporting to them, a Program Review Component should already be associated with each Program-level Recommendation originating from a Program Review.* This is a new feature for the 2017-18 Implementation Timeline year.

**FIRST**, visit your Program Review document, either in TracDat or a separate document. **COPY** the relevant text that supports the need for your recommendation. You need not copy lengthy content, just enough to support your recommendation and show the linkage from Program Review.

From the Home Screen, click the link under the Recommendations column for the recommendation you are editing. This will “expand” the information you can see. If you are on the Program Review & Planning page, click the carrot to the left of the Recommendation to expand. *Do not open or “Edit” the Recommendation.*

To link a Program Review Component, click on the  button to the right.



This opens the Add Program Review Component dialog box. Select the appropriate Category by clicking the drop-down list.

NOTE: Even though only one field is marked as a required field (\*), please complete all fields:

- In the 'Program Review Recommendation' field, **PASTE** the prioritized recommendation from your program review.
- Then **PASTE** the relevant text from program review into the 'Details' field. This text should justify your need for the recommendation.
- Include year of program review in the 'Year of Program Review' field.

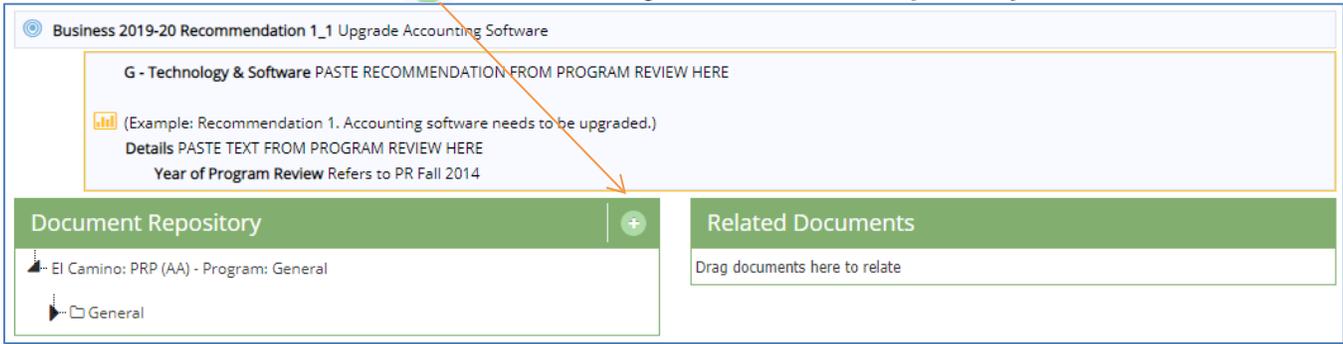
When each Component field is complete, click 'Save'. Then click 'Return' to go back to the Recommendation and Components. This field does not currently support rich text formatting (bold, italics, hyperlinks, etc.) or graphs/tables.

You may wish to associate an external supporting document to attach any supporting documentation with graphs, tables, etc. to a specific recommendation.

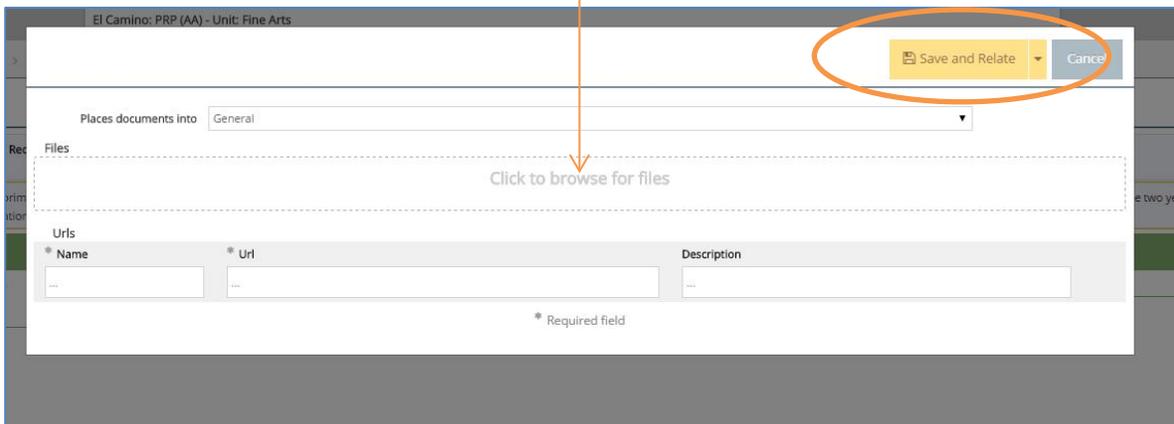
Under the associated recommendation, click the arrow to open up all fields below it.

Once it has opened, you will see another bar to add **Related Documents**. Click on the  icon to the right to add the document.

In the next window, click on the **+** button to the right of **Document Repository**.



A new window will open that says **click to browse for files** in the center. Name the file and click on **save and relate**.

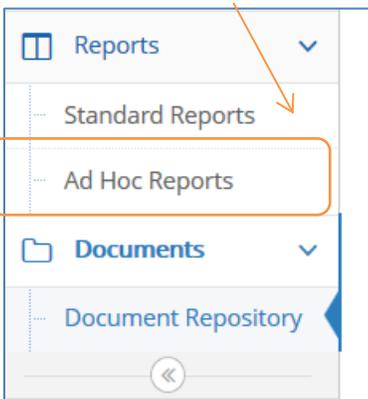


The supporting program review component is now linked to your recommendation and the link will print along with the Recommendation in standard reports.

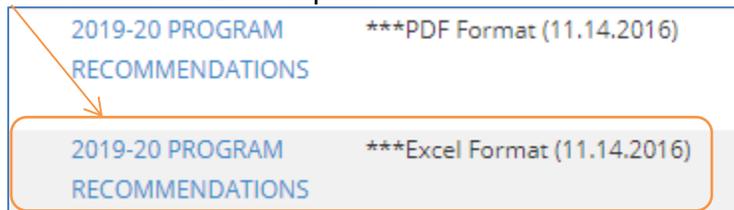
### Saving and Submitting Your New Recommendations

Once you have completed your annual Unit Plan, you will need to save a copy to the Document Repository. This step signals that your plan is complete and ready for consideration for your Division/Department's Area Plan. It replaces the "Submit" function of Plan Builder, the previous planning system. You will be submitting **TWO** reports of your new 2018-19 Recommendations:

**1. Ad Hoc Report:** This will facilitate prioritizing the recommendations at the AREA level.



Return to Reports, and select Ad Hoc Reports. Look for the Excel report format for the upcoming Plan Year (Implementation Timeline). Click the link to create the Excel report.



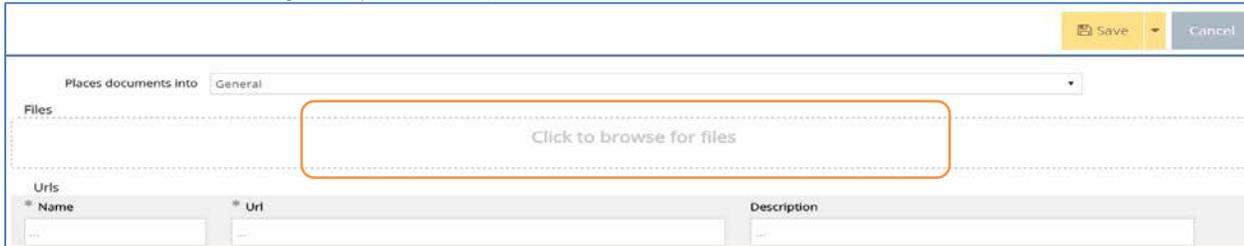
Once it has opened, save the document to a temporary location on your hard drive (e.g., Desktop). Highlight and replace the word "PROGRAM" with your UNIT abbreviation as shown below. Click save.



Next, go to **Document Repository**, under Documents in TracDat, and click the green + button to the right of Document Repository to upload your new Unit Plan.



Click the grey-text “Click to browse for files” in the middle of popup box. Find and select your file and save under the General folder in TracDat. If you have saved previous copies, delete them or rename them DRAFT to distinguish your final plan.



**2. Standard Report: This helps see the link between each Recommendation and Program Review Component.**

This procedure is the same procedure as when you archive your old recommendations (please see pp. 6-7 for detailed instruction). Please note:

- Change **Report Title** to Annual Unit Plan 2019-20
- Select “2019-20” for Implementation Timeline
- Check all boxes

Save the report to the **Document Repository**. **Your plan is now submitted!**

Notify your Vice President when your 2019-20 Unit Plan is completed.