



# TracDat Version 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 a newer 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](mailto: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 the latest version of 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’

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

Report Title	Description	Created By
No Ad Hoc Reports defined.		

[Create New Ad Hoc Report](#)

### 2. Define your Report

Output:

Layout:

Title:

Subtitle:

Description:

Data View:

[Save](#) [Return](#) [Run Report](#)

**Practice makes Perfect:**

All fields and selections may be edited at any time during and after the report creation process. Save your work now, edit later.



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

**Suggestions:**  
**PDF** is best for **small** (few pages) **reports** that you would like to **Print**.  
**HTML** is best for **small** (few pages) **reports** that you would like to **View** On-Screen.  
**Excel** is best for **all other reports**, particularly those that have a **large data set**, those that need **formatting changes**, or those that will benefit from the **filtering** and **sorting** capabilities in Excel.

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

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

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

<b>Sample Title</b>
Sample Subtitle
<b>Sample Data Columns</b>
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	Created By	
Sample Title	Sample Description	Johnson, Scott	<a href="#">edit</a>   <a href="#">run</a>   <a href="#">delete</a>

### 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 top 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 changed for your Institution\*\*

- Reporting Unit** (Data Fields under the Reporting Unit Tab)
- Assessment Unit** (Data Fields under the Assessment Unit Tab)
- Plan** (Data Fields under the Plan Tab)
- Course Assessment Plan** (Data Fields under Course Assessment Plan Tab)
- Observations** (Data Fields under the Observations Tab)
- Goals** (Data Fields from the Goals Section under the AU/RU Tab)
- Goal Relationships** (Data Fields from the Related Goals section under the Plan Tab)
  
- 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 data.

#### 4. Choose your Unit(s) and Reporting Fields

Output: \* PDF

Layout: \* Landscape

Title: \* New Report

Subtitle:

Description:

Data View: Results

Units: Assessment Unit

**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 Key down and clicking.

**Reporting Fields:** Choose the Data Fields that you would like 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	
<input type="checkbox"/>	unitName	500	<a href="#">group by this column</a>
<input type="checkbox"/>	displayOrder	200	<a href="#">group by this column</a>
<input type="checkbox"/>	objectivename	500	<a href="#">group by this column</a>
<input type="checkbox"/>	objective	1500	<a href="#">group by this column</a>

**Tip:** Hold your mouse over the Data Field to see the database field name (which corresponds closely to the original labels).

After choosing your Data Fields, click ‘Save’ 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.

**Suggestion:**  
Save frequently when you are working and making progress on 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 on ‘Run Report’ 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:

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

Column Selection:

	Title	Width	
<input checked="" type="checkbox"/>	Renaming the Fields	200	<a href="#">group by this column</a>
<input checked="" type="checkbox"/>	will Rename them for	500	<a href="#">group by this column</a>
<input checked="" type="checkbox"/>	this Ad Hoc Report only	1500	<a href="#">group by this column</a>
<input checked="" type="checkbox"/>	if you Save the changes	1500	<a href="#">group by this column</a>

**Tip:** After changing the Field Name, you can view the Database Field Name (original name) by holding your cursor over the field.

**B. 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.

**Tip:** Custom fields appear as 1500 pixels by default. Make them smaller if they take up too much room on the report.

**C. 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.



**D. 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.

### 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

**Tip:** Save your report if you have made changes that are desirable – this will overwrite your previous report, but will preserve the most clean and precise version.

**E. Filter the Report Results** by criteria within a selected field or fields. There is the option to further filter the results by field criteria.

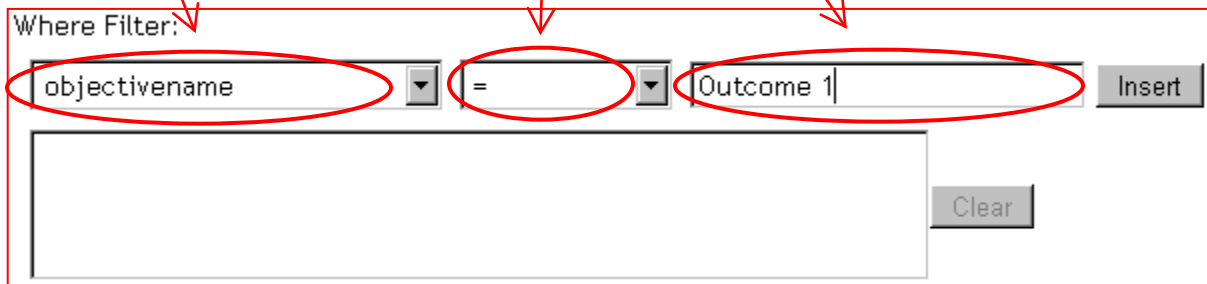
- 1) **Select the field** where you would like to filter.
- 2) **Select the type of filter** to use.
- 3) **Enter in the criteria** to filter the fields.
- 4) **Click 'Insert'** to Add the Filter
- 5) **Repeat for Additional Filters**, using AND/OR to qualify the filter

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
<b>LIKE</b>	Field is Similar to
<b>NOT LIKE</b>	Field is NOT Similar to
<b>IS NULL</b>	Field Equals Blank
<b>IS NOT NULL</b>	Field Equals NOT Blank

**Tip: To Filter By a Date Range**

Use Greater Than filter type, enter the date range beginning date with 'single quotes' around it and click 'Insert'.

Use the Less Than filter type, enter the date range end date and put 'single quotes' around it and click 'AND'

Your Filter Entry should look similar to the one below:

b.observationDate > '1/1/2008' AND b.observationDate < '12/1/2008'



## 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 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 / Delete** – All Ad Hoc Reports

**(Unit) Admin:**        **Create** – New Reports  
                              **Edit / Run / Delete** – All Ad Hoc Reports in the Unit

**User:**                    **Create** – New Reports  
                              **Run** – All Ad Hoc Reports in the Unit  
                              **Edit / Run / Delete** – Ad Hoc Reports that they have Created

**Reports Only:**        **Create** – New Reports  
                              **Run** – All Ad Hoc Reports in the Unit  
                              **Edit / Run / Delete** – Ad Hoc Reports that they have Created

### EXAMPLES:

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

Report Title	Description	Created By	
Report 1	Report Created by Admin	Johnson, Scott	<a href="#">edit</a>   <a href="#">run</a>   <a href="#">delete</a>
Report 2	Report Created by User	DeSante, Paul	<a href="#">edit</a>   <a href="#">run</a>   <a href="#">delete</a>

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

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

Report Title	Description	Created By	
Report 1	Report Created by Admin	Johnson, Scott	<a href="#">run</a>
Report 2	Report Created by User	DeSante, Paul	<a href="#">edit</a>   <a href="#">run</a>   <a href="#">delete</a>

**Report that you created  
(All Access)**