Administrator-level Strategic Reporting
Tracdat for the VP or College Dean

Login to http://lssu.tracdat.com, until you change it your username and password are BOTH your LSSU ID

Reporting Units are in place for each cabinet-level unit on the Org-Chart (shown in yellow), and for each Dean (Colleges shown in orange). **Reporting units** define the Seven Key Strategies of the Strategic Plan as implemented by this unit, and an Annual Report category to document more general items.
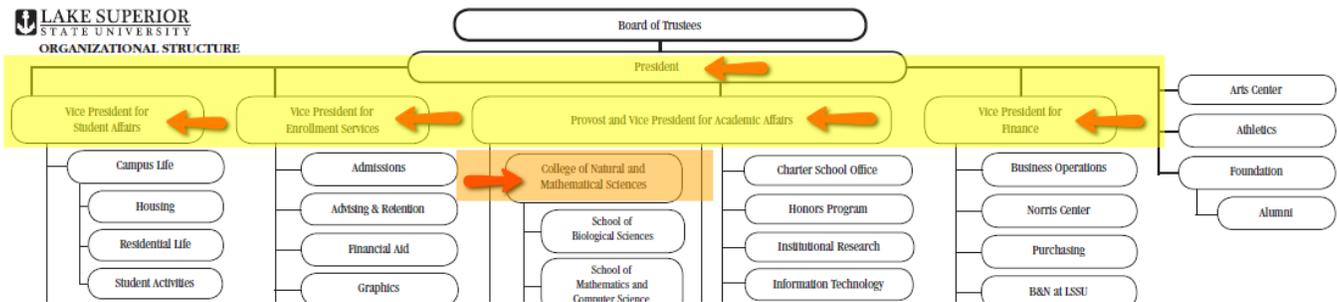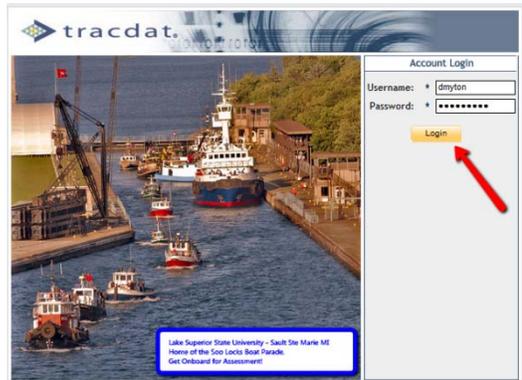
Navigate to your "**Administrative Reporting Unit**" by selecting the white dropdown menu, then select "**Strategic Planning**" on the second line, and select "**Strategic Outcomes**" on the third line. The screen should look something like this:

Your Subsidiary Units will link their activities to the items listed here in the Reporting Unit. You will generate a report based on those activities, and then enter a summary for each key strategy. MORE ON THAT IN A MOMENT, but now let's look at the **view from a Subsidiary Unit**.

Each Subsidiary Unit will have **their own** "Administrative Unit Outcomes". Those that are tied to the Strategic Plan should have the Key Strategy numbering included in the description. An "Annual Report" outcome has been included for other general activities. The "Administrative Unit Outcomes" are **LINKED** to your "Administrative Reporting Unit" on the tab "Link to Strategic Outcomes"

When the Subsidiary Unit connects their unit outcome to your Key Seven, they select the "**Link to Strategic Outcomes**" tab, select the specific outcome from the drop menu, and CHECK the Strategy from your list of strategies contained in the "Administrative Reporting Unit" (see red arrow below)

How Subsidiary Units enter their activities and findings is covered in **"Subsidiary Unit Strategic Reporting"**. We will next see how to **generate a report** from your units.
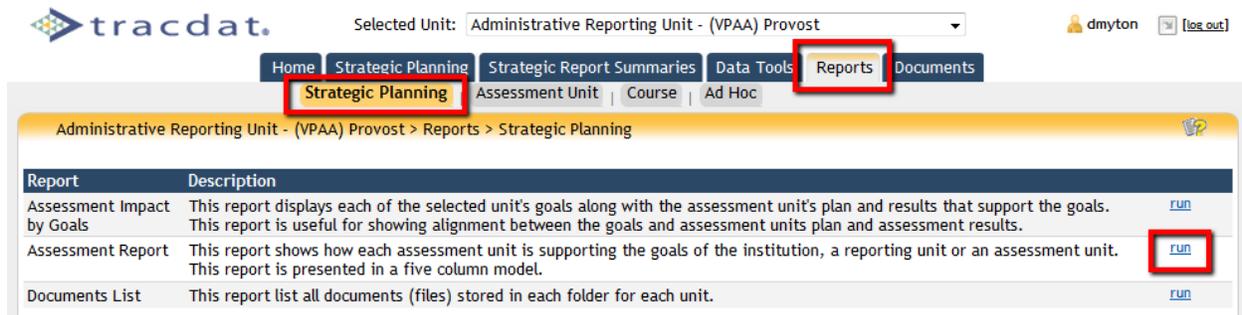
Return to your "Administrative Reporting Unit" and select the "Reports" tab from the second line. Reports can be run from several levels – select the "Strategic Planning" level and run the "**Assessment Report**". For this example we will narrow the report to just "Strategy 4 Student Learning", and collect data from "<All>" of the Subsidiary Units. Don't select any other filters, and click "Open Report".
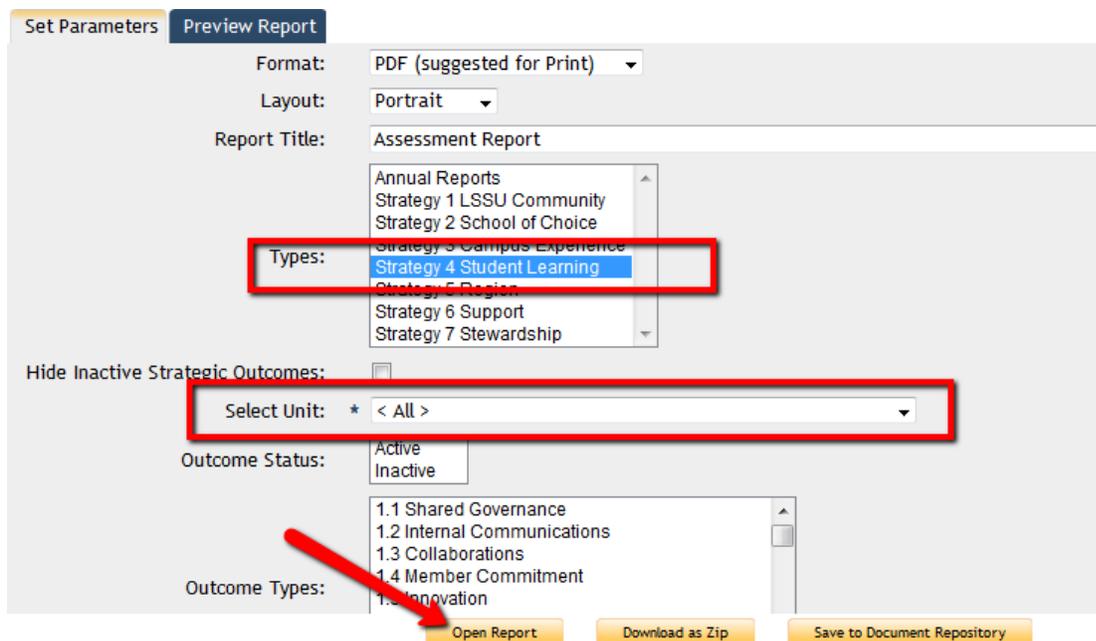
The report this produces becomes the basis for the VP/Dean level overview summary. The Yellow box in the next figure indicates the narrative submitted by the **Subsidiary Unit** to describe the findings or activities related to this unit-level outcome. In this case there was no action identified as a result of the findings – this may or may not be necessary. The "??" shows where that action plan would appear. Depending on the specific outcome and finding. Supporting documents (red arrows) provides resource files containing the evidence or documents submitted in support of the claim.

Assessment Report
Lake Superior State University
Administrative Reporting Unit - (VPAA) Provost

Strategic Outcome	Unit-level Outcomes	Means of Assessment, Responsibility & Criterion/Targets/Thresholds / Tasks	Strategic Report Summaries	Action to be Taken, Reso Status & Follow-Up
Strategy 4 Student Learning - 4. Student Learning and Development - LSSU will maintain and develop excellent programs for students which provide experiential learning activities that take advantage of this unique region.	Administrative Unit (VPAA) - Associate Provost - Assessment activities - 4.4 The Associate Provost's office supports institutional quality initiatives providing leadership to the university through assessment activities, projects, training and oversight.	**Assessment Method:** The Associate Provost, through the SG Assessment Committee, will develop, disseminate and facilitate implementation of a University Assessment Plan (UAP) in the areas of academic assessment and operational support assessment. **Assessment Category:** Strategic - Report or Audit **Criterion/Target/Threshold:** Publication in advance of the February 2013 HLC Monitoring Report, and maintained/updated thereafter	06/10/2013 - Published Final Report from the Digital Photo-Assessment Project and cross-walk alignment to the Strategic Plan. This project surveyed 10% of all students, faculty and staff to identify good/bad areas of the university. Each contribution is aligned to the Critical Outcomes of the University Strategic Plan **Strategic Status Indicator:** Yes **Reporting Year:** 2012-2013 **Related Documents:** Digital Photo Assessment Project Spring 2013.pdf Digital Photo Project - Critical Outcome list.pdf	??

Using the Assessment Report for each Key Strategy compiled across "<All>" units the VP or Dean then synthesizes the activities in an **Executive Summary** using the tab: "Strategic Report Summaries. Select "Add Strategic Report Summary" then select the Key Strategy on which you wish to work.

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Selected Unit: Administrative Reporting Unit - (VPAA) Provost   dmyton [log out]

Home | Strategic Planning | Strategic Report Summaries | Data Tools | Reports | Documents
By Strategic Outcome

Administrative Reporting Unit - (VPAA) Provost > Strategic Report Summaries

1. Collaborative, Committed Campus Community - LSSU will develop a permanent and permeating culture of sharing ideas, knowledge, resources, and talent across campus fostering a sense of pride and community.

▶ Show Strategic Report Summaries

Add Strategic Report Summary

Now the cool part, when you get this dialog-box – select "YES"

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Selected Unit: Administrative Reporting Unit - (VPAA) Provost   dmyton [log out]

Home | Strategic Planning | Strategic Report Summaries | Data Tools | Reports | Documents
By Strategic Outcome

Administrative Reporting Unit - (VPAA) Provost > Strategic Report Summaries > By Strategic Outcome > Select Strategic Outcome

Type	Strategic Outcome	
Strategy 1 LSSU Community	1. Collaborative, Committed Campus Community - LSSU will develop a permanent and permeating culture of sharing ideas, knowledge, resources, and talent across campus fostering a sense of pride and community.	select
Strategy 2 School of Choice	2. Desirable School of Choice (recruiting/academic reputation) LSSU will attract an increasing number of students who are academically prepared and reflective of society's diversity.	select
Strategy 3 Campus Experience	3. Student Campus Experience (retention/campus life) LSSU will provide students with a supportive, connected, and comfortable campus experience to enhance student development.	select
Strategy 4 Student Learning	4. Student Learning and Development - LSSU will maintain and develop excellent programs for students which provide experiential learning activities that take advantage of this unique region.	select
Strategy 5 Region	5. Regional Communities - LSSU will collaboratively contribute to economic growth and improved quality of life in our region.	select
Strategy 6 Support	6. Educational Support - LSSU will establish and maintain an appropriate level of educational resources to effectively support learning.	select
Strategy 7 Stewardship	7. Stewardship and Sustainability - LSSU will promote efficient and effective utilization of resources to lay the	select
Annual Reports		select

Select Strategic Outcome
Would you like to view/select Related Strategic Report Summaries prior to entering the Strategic Report Summary?
yes | no

Return

You will now be on a page which summarizes all the activities of your Subsidiary Units with checkboxes where you can hand-select key activities you want to highlight in your **Executive Summary**
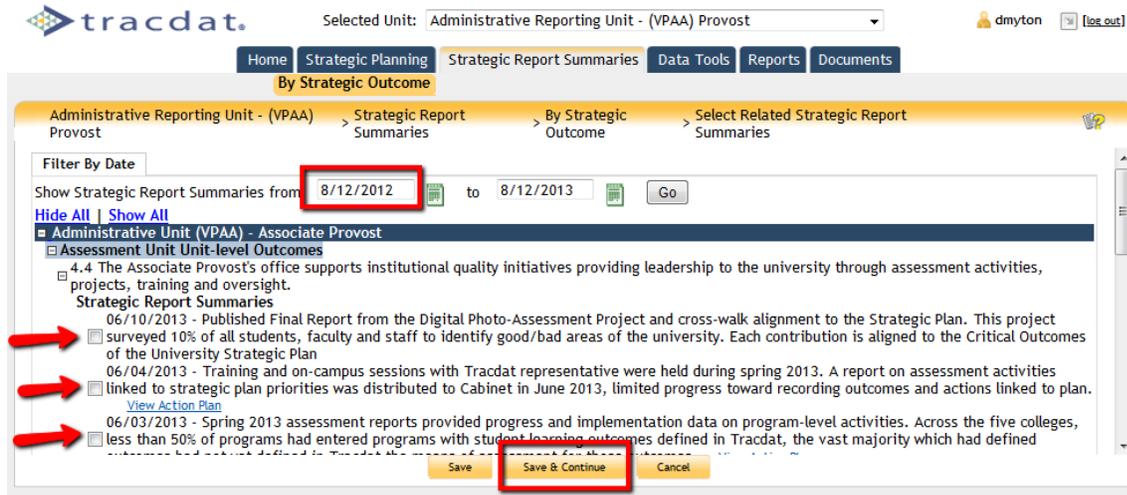
After you click "Save & Continue" you will be advanced to the page where you enter the Executive Summary of activities related to your selected Key Strategic outcome. Two Dropdown boxes are used to indicate the year of this summary report, and the "Strategic Status Indicator" is used to evaluate progress in this Strategic area.
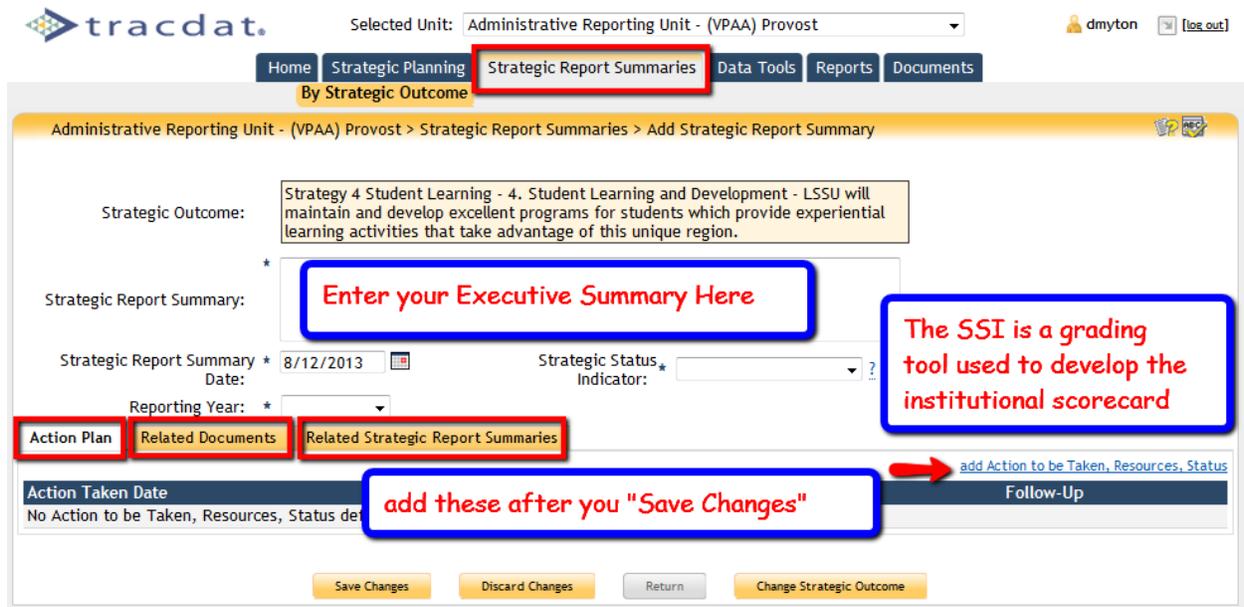
When you select the "Action Plan" tab at the bottom, and click "add Action to be Taken, Resources, Status" you will advance to a page where you can define the next steps your unit will be taking in this area. Selecting the tab "Related Documents" advances to a page where you can append any type of supporting documentation or reports (you may want to append the "Assessment Report" you generated earlier for this strategic area). You can revisit the selection(s) you made of the highlighted Subsidiary Unit activities under the tab "Related Strategic Report Summaries". Save Changes when done.