

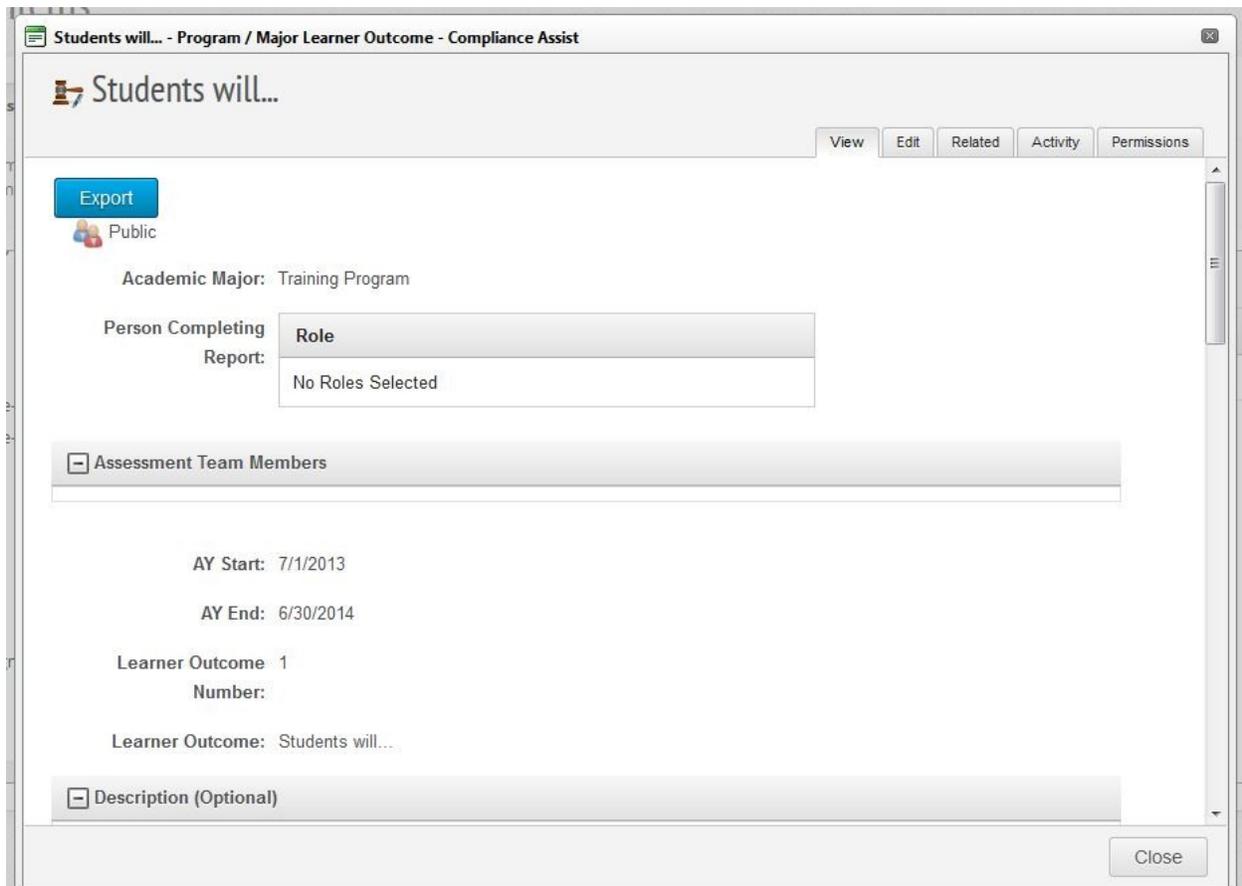
Generating Reports in Compliance Assist (Revised May 2015)

This how-to guide walks through how to produce reports through two different options: either by single-outcome, or all outcomes.

Single outcome:

In order to produce a printable or save-able version of a single outcome, just bring up the

outcome as if you are going to edit it. From there, click on the  button.



The screenshot shows a web application window titled "Students will... - Program / Major Learner Outcome - Compliance Assist". The main content area is titled "Students will..." and includes a blue "Export" button. Below the button, there is a "Public" label with a person icon. The "Academic Major" is set to "Training Program". A "Person Completing Report" section has a "Role" dropdown menu currently showing "No Roles Selected". There are two collapsed sections: "Assessment Team Members" and "Description (Optional)". At the bottom right, there is a "Close" button. The interface also features a top navigation bar with "View", "Edit", "Related", "Activity", and "Permissions" buttons.

Students will... - Program / Major Learner Outcome - Compliance Assist

Students will...

View Edit Related Activity Permissions

Export

Public

Academic Major: Training Program

Person Completing Report: Role

No Roles Selected

[-] Assessment Team Members

AY Start: 7/1/2013

AY End: 6/30/2014

Learner Outcome 1

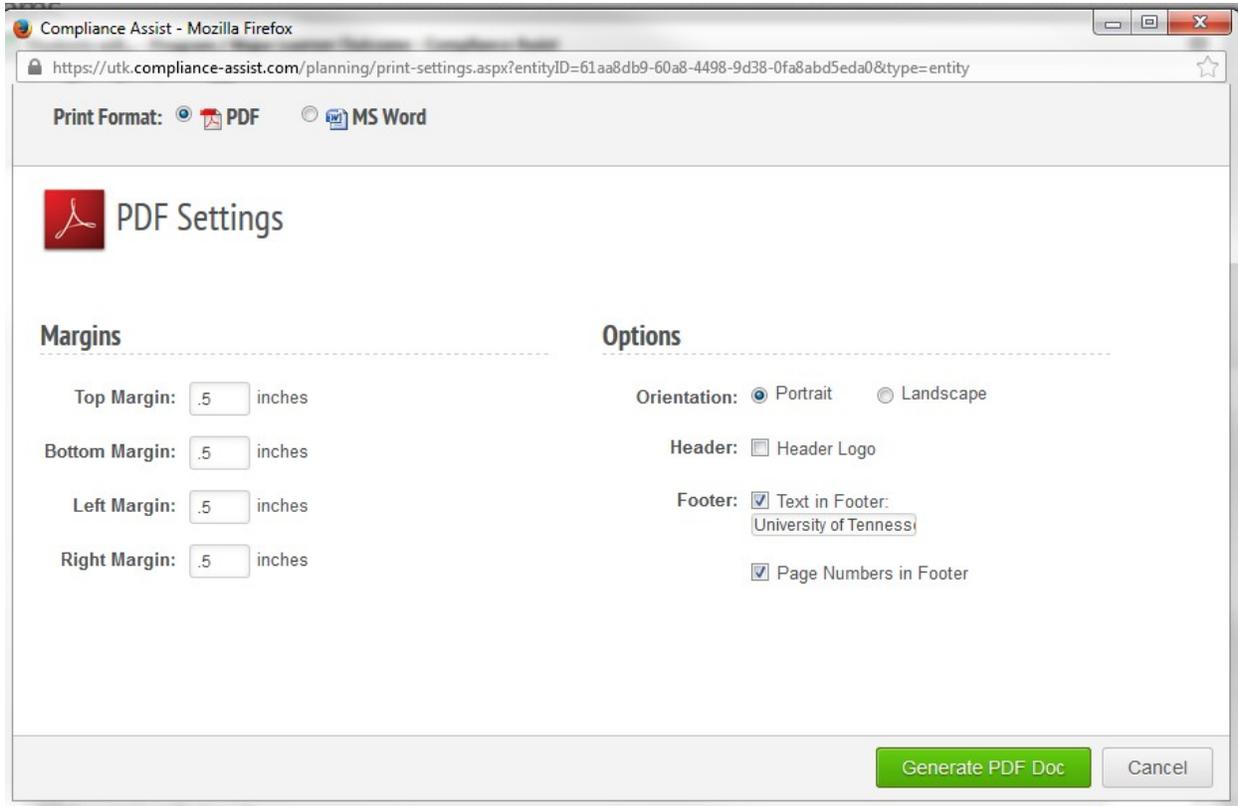
Number:

Learner Outcome: Students will...

[-] Description (Optional)

Close

After the Export button is clicked, a screen asking you whether you would like the report in PDF in Microsoft Word will pop up. After selecting which option you'd like, click on



Your exported outcome will look the same way it did in Compliance Assist.

! Students will...

Public

Academic Major: Training Program

Person Completing Role

Report:

No Roles Selected

Assessment Team Members

AY Start: 7/1/2013

AY End: 6/30/2014

Learner Outcome 1

Number:

Learner Outcome: Students will...

Description (Optional) _____

Term data collected:

Course(s) or collection schedule detail (optional) _____

Direct Assessment
Method(s)
(Required):

Direct Assessment Method(s) Description

Indirect Assessment
Method(s):

Indirect Assessment Method(s) Description

Assessment Results & Analysis _____

Baseline Resources _____

Name	Source
------	--------

No items to display.

All Outcomes:

In the case that you wish to produce a report that contains all outcomes and in a cleaner format, select the “Reports” option at the top of the page. You should then be able to see two tabs:

Department and Individual. The department tab lists all reports available to those within your department. Additionally, you will see any reports generated by the college or Provost’s office.

Depending on your permission level, you may not be able to create department level reports. The individual tab contains reports that you have created and are visible to you only (unless you grant permission to others, which is shown later). Click on the **+ Add Report** button to begin a report.

Reports - Individual Reports

Reports - Individual Reports		
Department Individual		
+ Add Report		
Name	Description	Actions
Test	Test	Download Generate
Test report	Test	Download Generate

The following screen should pop up. The Name and Description are required to proceed. If you leave either field blank, a message will pop up instructing you to fill it in.

Compliance Assist

Add New Report

Step 1 of 8: Report Information

Details

Name:

Description:

Report Access: Individual

This report will only be available to you. You will have the option to grant additional people access to this report later in the setup process.

Confidentiality Include a confidentiality notice on this report.

Next »

After you have filled in a Name and Description, the next screen will ask what kind of data type you wish to include in the report. Depending on your permission level and program needs, other types could be used, but most will likely only need to run a report for “Program/Major Learner Outcome.” Just click on the name of the type, then use the  button to move it over. Then click



Compliance Assist

Add New Report

Step 2 of 8: Data Types

Select the Data Types to include in this report.

Data Types to Include

* Please select at least one data type.

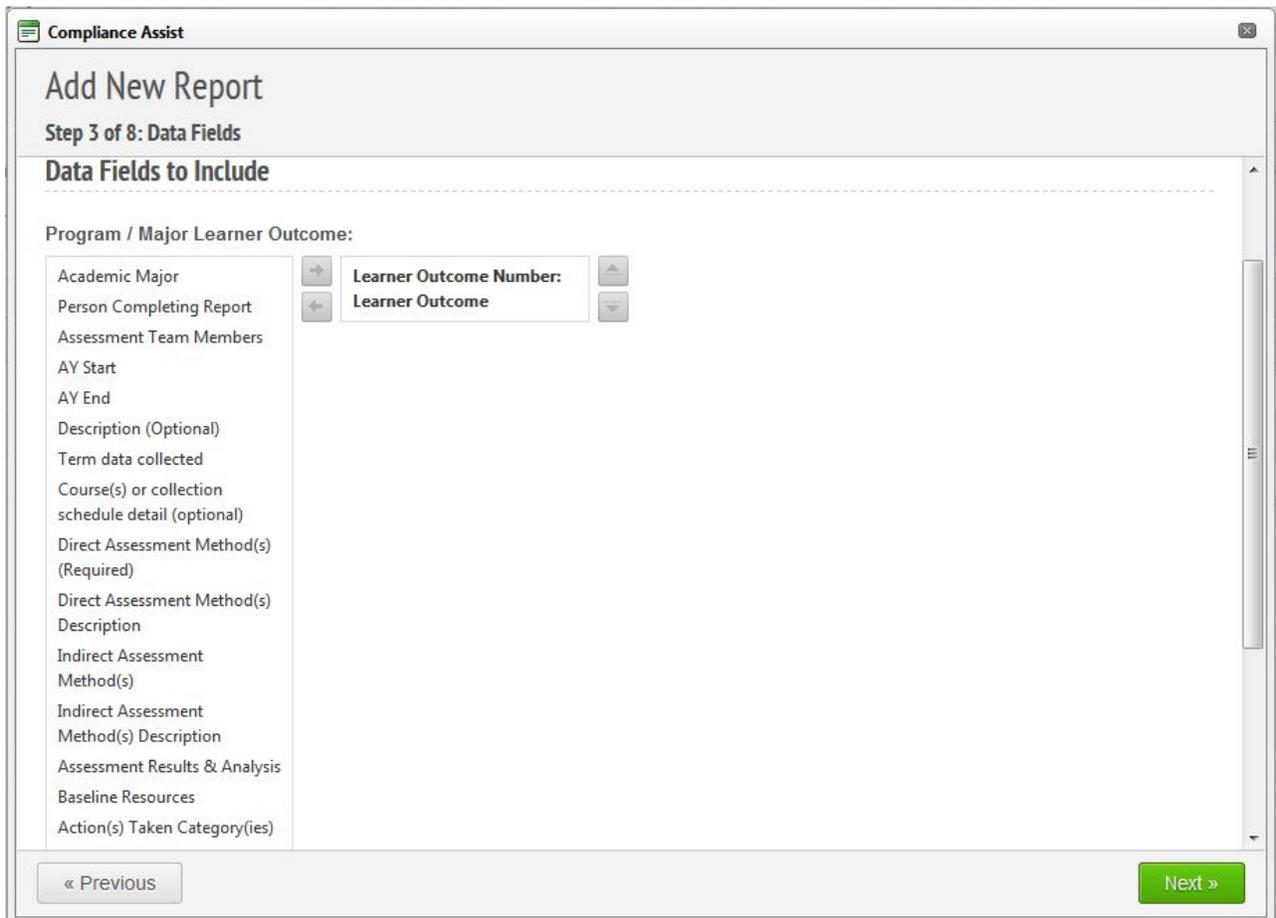
- Academic Major Purpose
- Program Goal
- Program Status Report
- Division Mission**
- College Mission
- Department/Unit Mission
- Institutional Strategic Priority
- Division/College Strategic Priority
- Unit Strategic Priority
- Institutional Strategic Initiative
- Division/College Strategic Initiative
- Unit Strategic Initiative
- Key Metric

Layout

« Previous Next »

The next screen contains all the fields specific to Program/Major Learner Outcome.

Therefore, you can include as much or as little information as you'd like. Simply select the fields you want to include and move them over using the  button. *Note: Unfortunately, at this time you can only move fields over one at a time. We are working with our Compliance-Assist liaison to try to change this.*



Compliance Assist

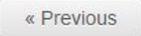
Add New Report

Step 3 of 8: Data Fields

Data Fields to Include

Program / Major Learner Outcome:

Academic Major		Learner Outcome Number:	
Person Completing Report		Learner Outcome	
Assessment Team Members			
AY Start			
AY End			
Description (Optional)			
Term data collected			
Course(s) or collection schedule detail (optional)			
Direct Assessment Method(s) (Required)			
Direct Assessment Method(s) Description			
Indirect Assessment Method(s)			
Indirect Assessment Method(s) Description			
Assessment Results & Analysis			
Baseline Resources			
Action(s) Taken Category(ies)			

The next screen is Related Items. Unless you're involved in strategic planning, you probably won't

need to use this feature. So, you can skip this by clicking

Next »

The screenshot shows a window titled "Compliance Assist" with a close button in the top right corner. The main heading is "Add New Report" and the sub-heading is "Step 4 of 8: Related Items". A light blue informational box contains the text: "Check the box below if you would like to include related items in your report. The related items will appear indented below each planning entry. You will also be given the option to select the number and type of related items to include in the report." Below this, there are two sections: "Sections" and "Related Items", each with a checkbox and a label. The "Sections" section has the checkbox "Show related Course Sections for each item in the report." and the "Related Items" section has the checkbox "Show related items for each item in the report." At the bottom left is a "« Previous" button and at the bottom right is a green "Next »" button.

Compliance Assist

Add New Report

Step 4 of 8: Related Items

ⓘ Check the box below if you would like to include related items in your report. The related items will appear indented below each planning entry. You will also be given the option to select the number and type of related items to include in the report.

Sections

Show related Course Sections for each item in the report.

Related Items

Show related items for each item in the report.

« Previous Next »

The next step is Filtering. This is where you specify the time period and program for which you need the report. This step is also useful for the administration and consultants at the Teaching and Learning Center for any summary reports they may need to run.

Compliance Assist

Add New Report

Step 5 of 8: Filtering (Optional)

ⓘ Check the appropriate boxes below if you would like to filter your report by Start/End Dates or by specified Report criteria using a combination of Common and Custom field filters.

Filter Summary

Show a summary of filters at the end of report.

Start & End Dates

Only include items applicable to a specified time period.

Report Filters

Only include items that fit the following filter criteria.

« Previous Next »

In order to select a particular time frame, select the box that says “Only include items applicable to a specified time period.” After that, you’ll have options pop up for start and end dates. Probably the easiest is to select the button to the right that says “Enter Assessment Year Dates.”; it allows you to pick an academic year and the dates are then filled in automatically. For the 2012-2013 year, the field would look like this:

Start & End Dates

Only include items applicable to a specified time period.

Start Date: 

End Date: 

Allow these dates to be changed when this report is generated.

Filter related items by these dates.

Next, you’ll need to check “Only include items that fit the following criteria” under “Report Filters.” This will bring up two fields: Common Fields and Custom Fields. Common Fields is where you select your program. Select the “Add Expression” symbol, which looks like this: .

You’ll then see the expression “Provider Equal to” along with a side menu to the right from which you can select your program. It will look something like this:

Report Filters

Only include items that fit the following filter criteria.

 Click  to add a filter. Click  to add additional condition group

Common Fields

AND    

Provider EqualTo Training Program 

Custom Fields

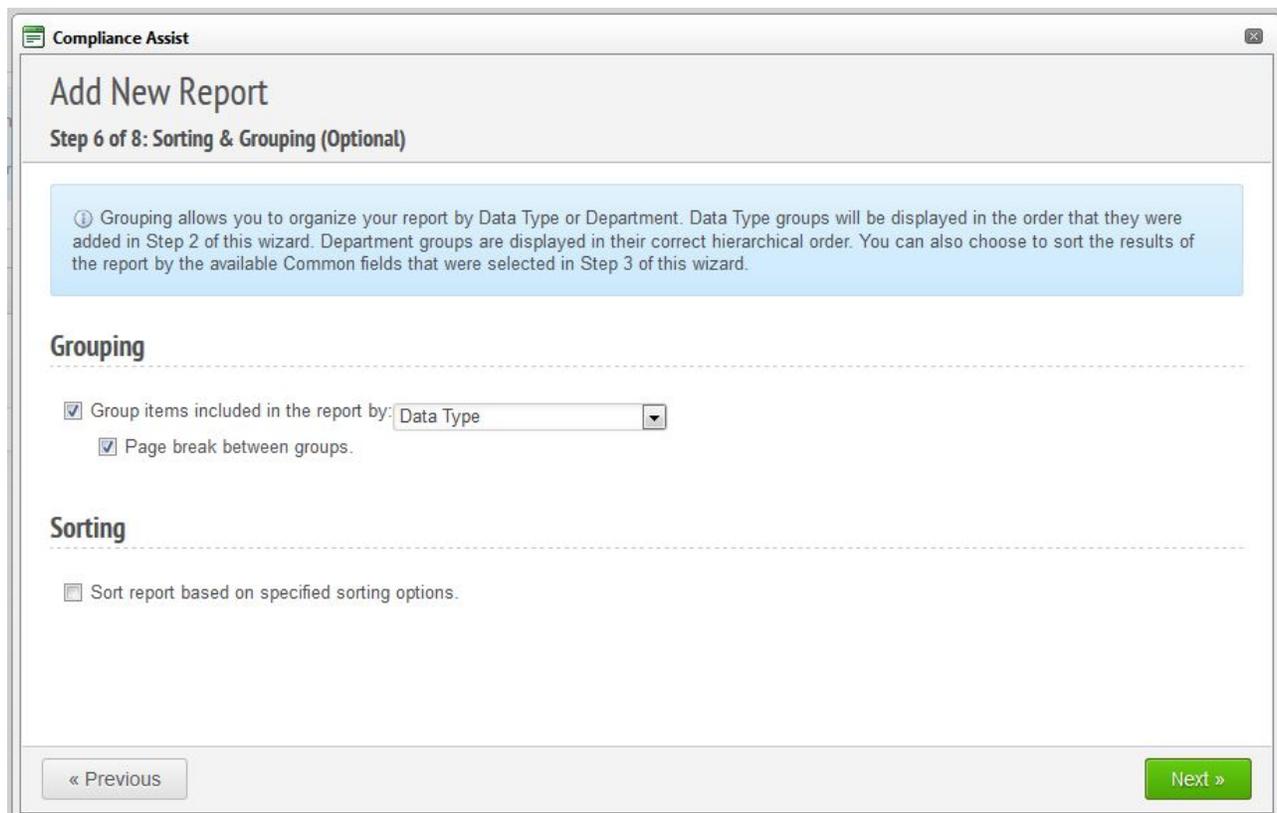
Program / Major Learner Outcome

AND    

- University of Tennessee
 - Athletics
 - Chancellor's Office
 - Communications and Marketing
 - Development and Alumni Affairs
 - Diversity
 - Finance and Administration
 - Human Resources
 - Provost's Office

Note that under “Custom Fields” you can add other filters, but it is not a required field. Once all your filters are in place, click .

The Sorting and Grouping page is also optional and just gives you a few options to make your report look a little cleaner. One option you might want to use is “Page Break Between Groups” as it puts a little extra space in between data types in the report so it's more readable.



Compliance Assist

Add New Report

Step 6 of 8: Sorting & Grouping (Optional)

Grouping allows you to organize your report by Data Type or Department. Data Type groups will be displayed in the order that they were added in Step 2 of this wizard. Department groups are displayed in their correct hierarchical order. You can also choose to sort the results of the report by the available Common fields that were selected in Step 3 of this wizard.

Grouping

Group items included in the report by: Data Type

Page break between groups.

Sorting

Sort report based on specified sorting options.

« Previous Next »

The seventh step asks you about Permissions. It's a little strange, but you'll first see a pop-up screen that essentially asks you to give yourself permission to view the report. Just check the box and click "Continue."

Compliance Assist

Add New Report

Step 7 of 8: Permissions

Specify who has access to view and manage this report. Although marking this report public or granting individual role permissions will allow users to run this report, the results of the report will be trimmed to only include data items that they have access to based on their role permissions.

Public

Allow this report to be run by all users.

Individual Access

+ Add Role - Delete Selected Role(s)

Department	Role	Access Level
No roles have been granted independent access to this report.		

Add Role

Please select one or more of your roles to give you access to manage this report.

OIRA (University of Tennessee)

Continue

« Previous Next »

After you have given yourself permission, you'll see that under "Individual Access". you can grant others permission to view the report. After you have set all permissions, click 

Compliance Assist

Add New Report

Step 7 of 8: Permissions

ⓘ Specify who has access to view and manage this report. Although marking this report public or granting individual role permissions will allow users to run this report, the results of the report will be trimmed to only include data items that they have access to based on their role permissions.

Public

Allow this report to be run by all users.

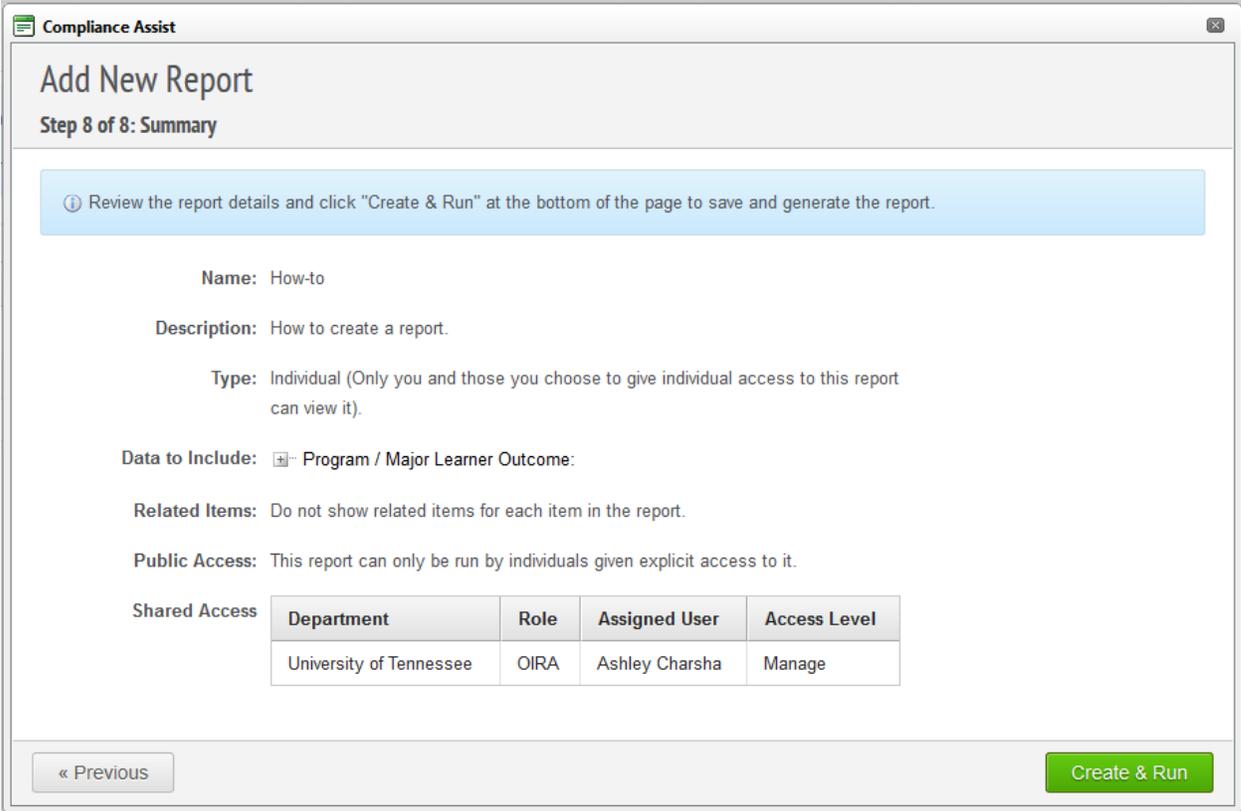
Individual Access

+ Add Role ✖ Delete Selected Role(s)

Department	Role	Assigned User	Access Level
University of Tennessee	OIRA	Ashley Charsha	Manage

« Previous
Next »

The final step in creating a report just gives you a summary of what you selected. If everything looks correct, click **Create & Run**.



Another screen will pop up asking you to select a format for your report (PDF, Word, or Excel) and confirmation of your email. After selecting your format and confirming your email, click “Generate Report” and an email will be sent to you when the report is ready.

Compliance Assist

Generate Report Request

hh

Type of Report PDF

Notify User acharsha@utk.edu Clear

Enter your email address to be notified when the report is ready to download.

Larger reports may take some time to process. Visit the Report Download page to see the status of this report request.

Generate Report Cancel

The screenshot below shows part of the report ran for the program used for demonstration in the Compliance-Assist Planning Module Training. As you can see, it's laid out differently than the "Export" option for single outcomes.

2012-2013 Annual Assessment Report
Department: Training Program

University of Tennessee
Provost's Office
College of Agricultural Sciences and Natural Resources
Training Program

1: Students will...

Assessment Team Members
Michael McFall

AY Start: 7/1/2012
AY End: 6/30/2013
Term data collected: Fall semester, Spring semester

Course(s) or collection schedule detail (optional)
Psych 101

Direct Assessment Method(s) (Required): Laboratory reports, Portfolio review, Other (please describe below)

Direct Assessment Method(s) Description

A final note: if you decide later that you would like to adjust something in the report, you don't need to go through all the steps again. Instead, click on the report name and it will bring up a screen (below) in which you can make any adjustments needed. After the edits are made, click "Save and Close" and Generate the report from under the Actions column.

