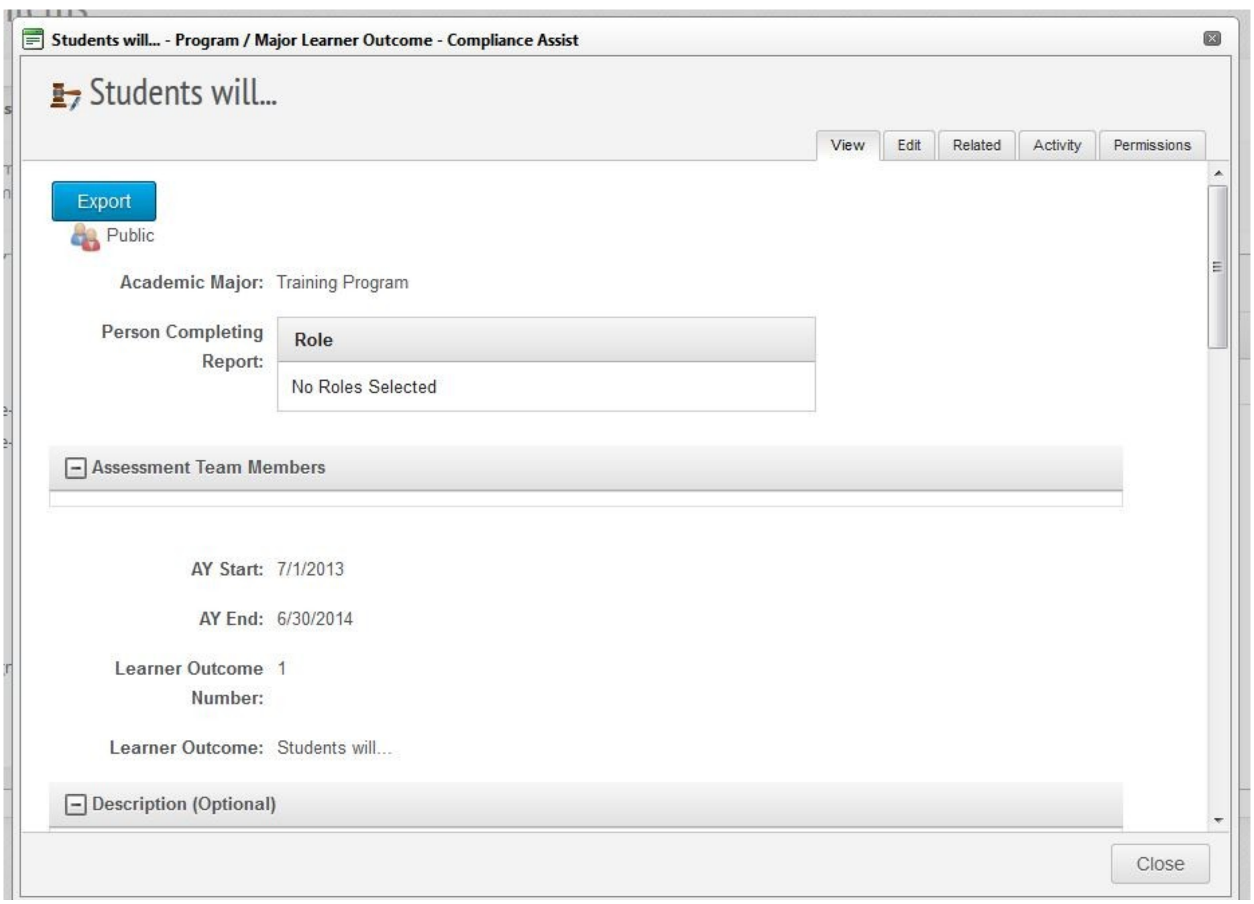
Generating Reports in Compliance Assist (Revised May 2015)

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.



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

or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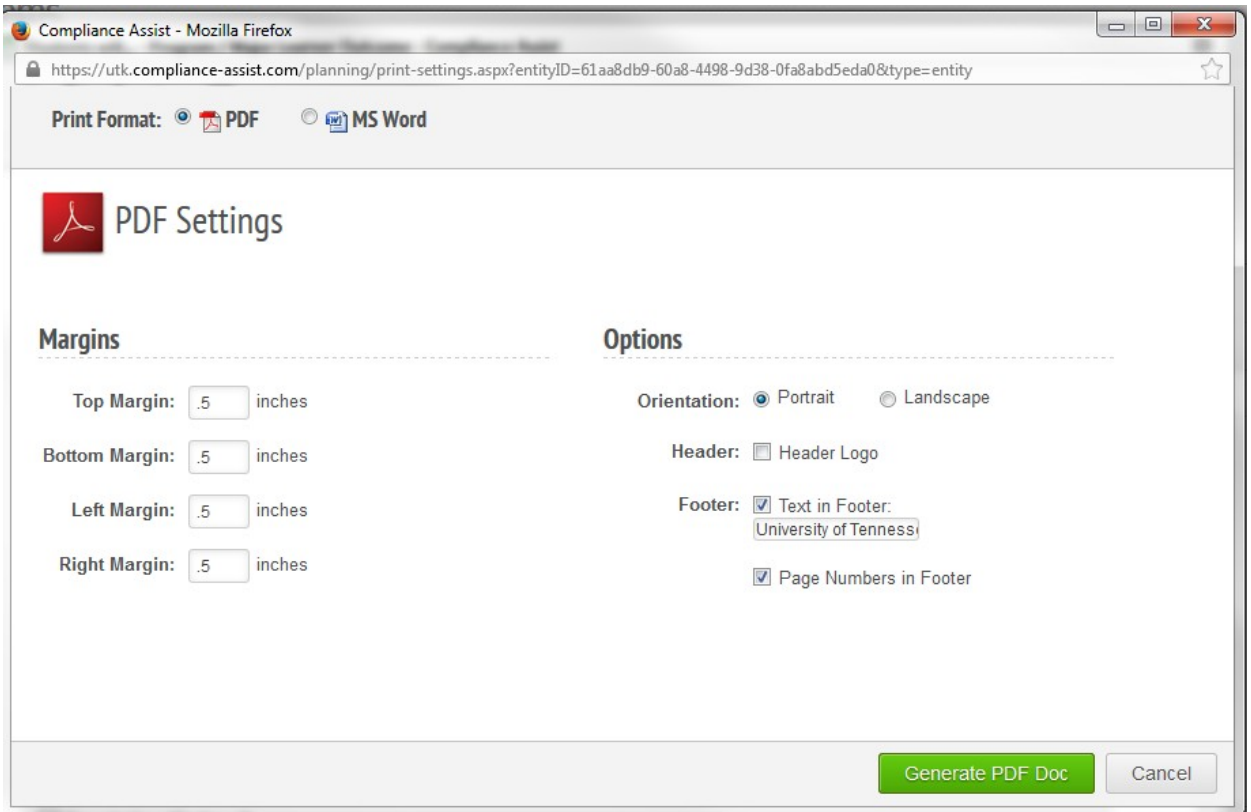


Your exported outcome will look the same way it did in Compliance Assist.

! ; Students will...

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 Number: 1

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

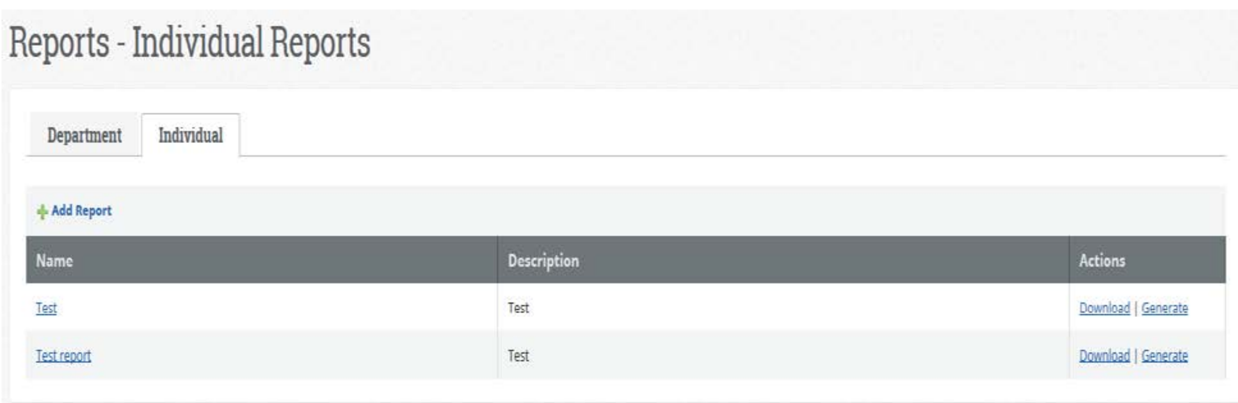
Baseline Resources

Name	Source

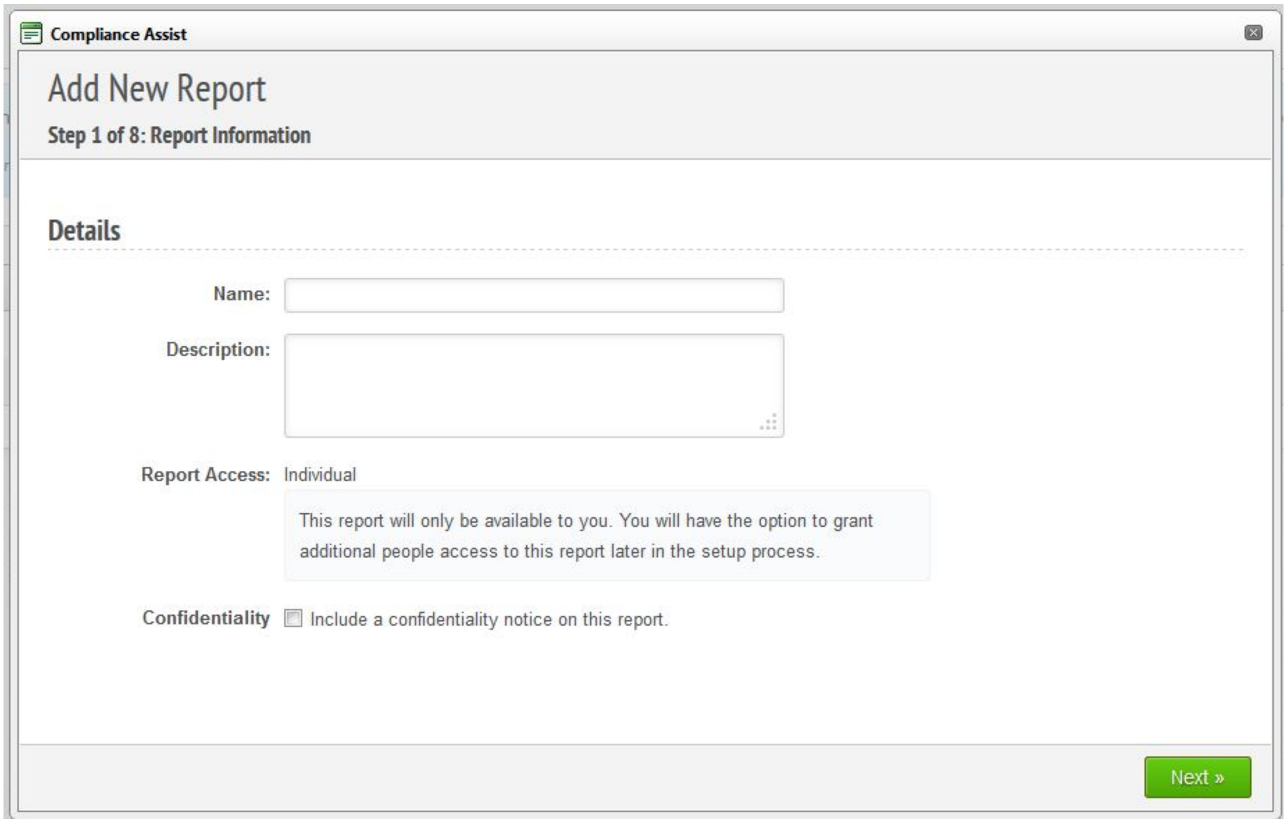
No items to display.

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.



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.



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 

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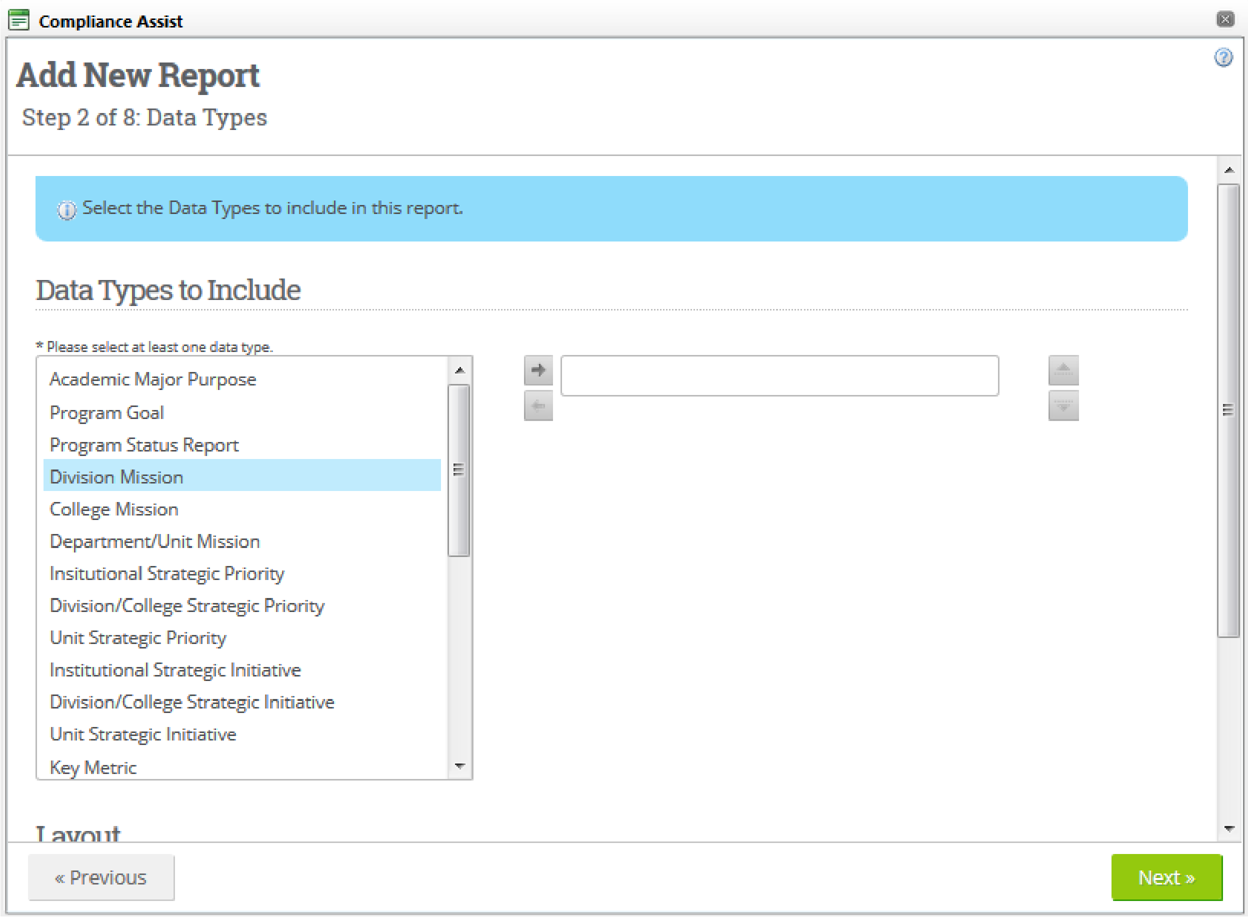
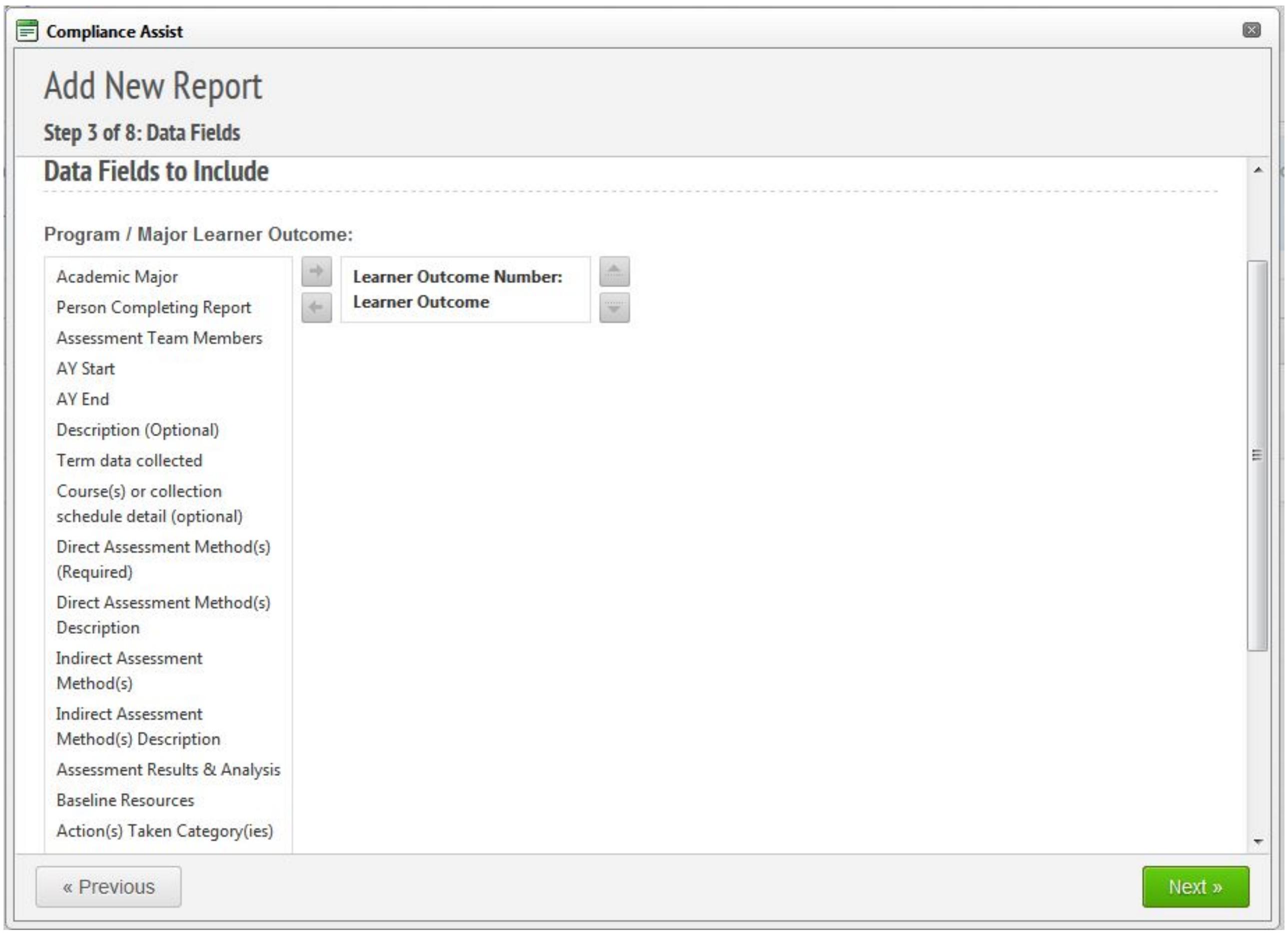
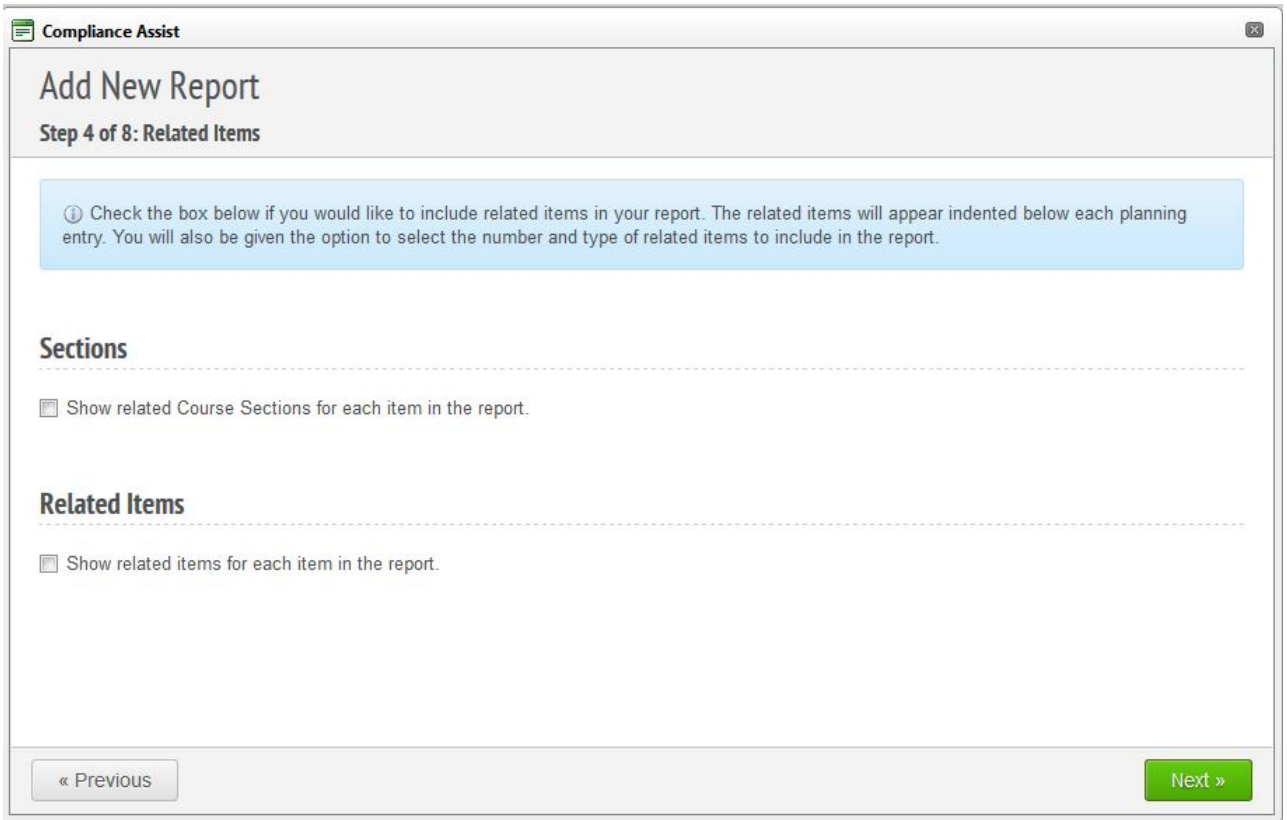


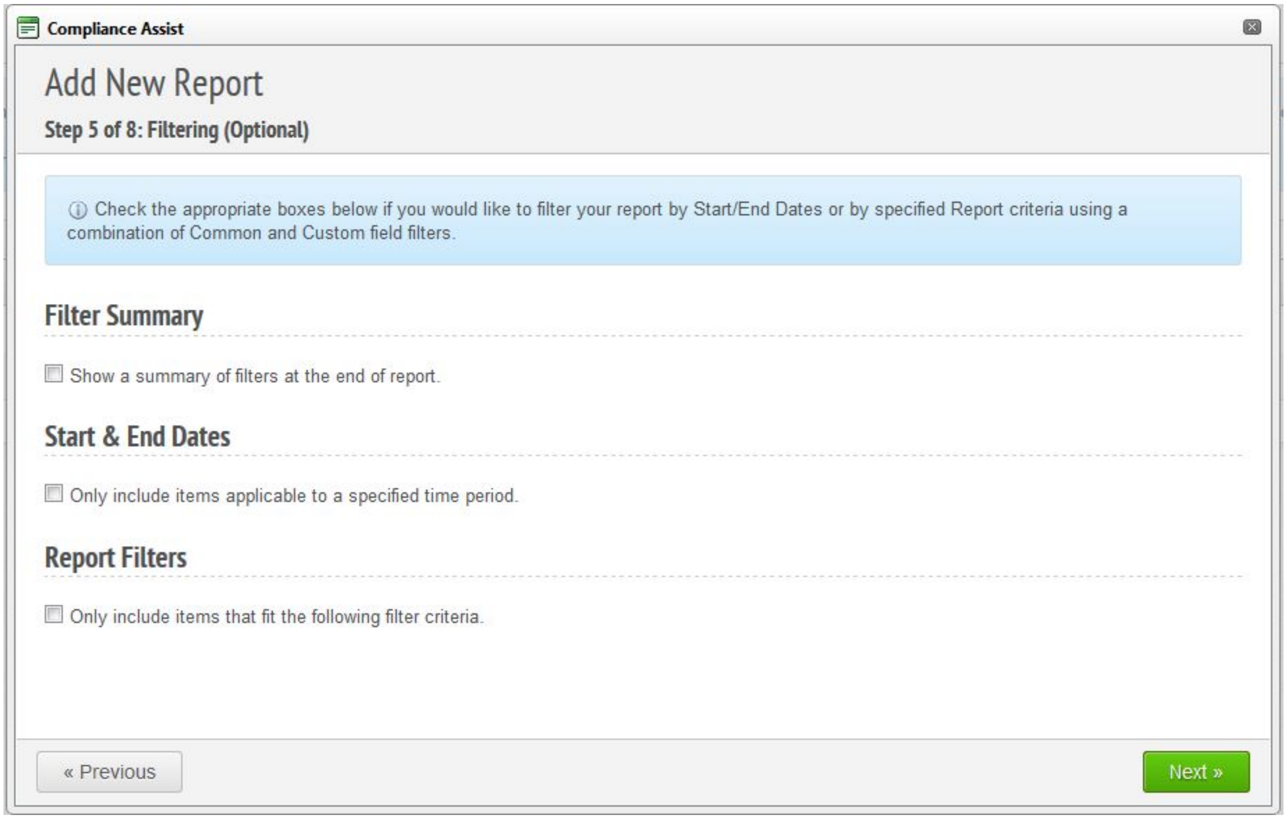
The next screen contains all the fields specific to Program/Major Learner Outcome. Therefore, you can include as much or as little information as you'd like. Simply select the fields you want to include and move them over using the  button. *Note: Unfortunately, at this time you can only move fields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



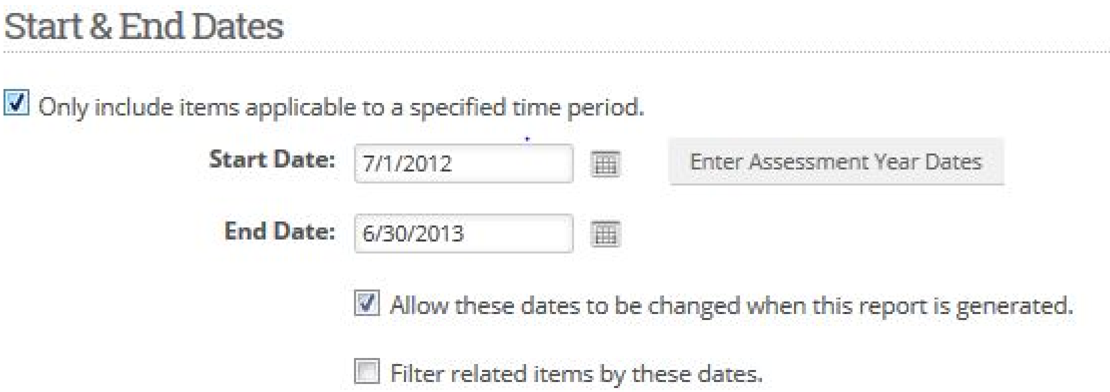
The next screen is Related Items. Unless you're involved in strategic planning, you probably won't need to use this feature. So, you can skip this by clicking 



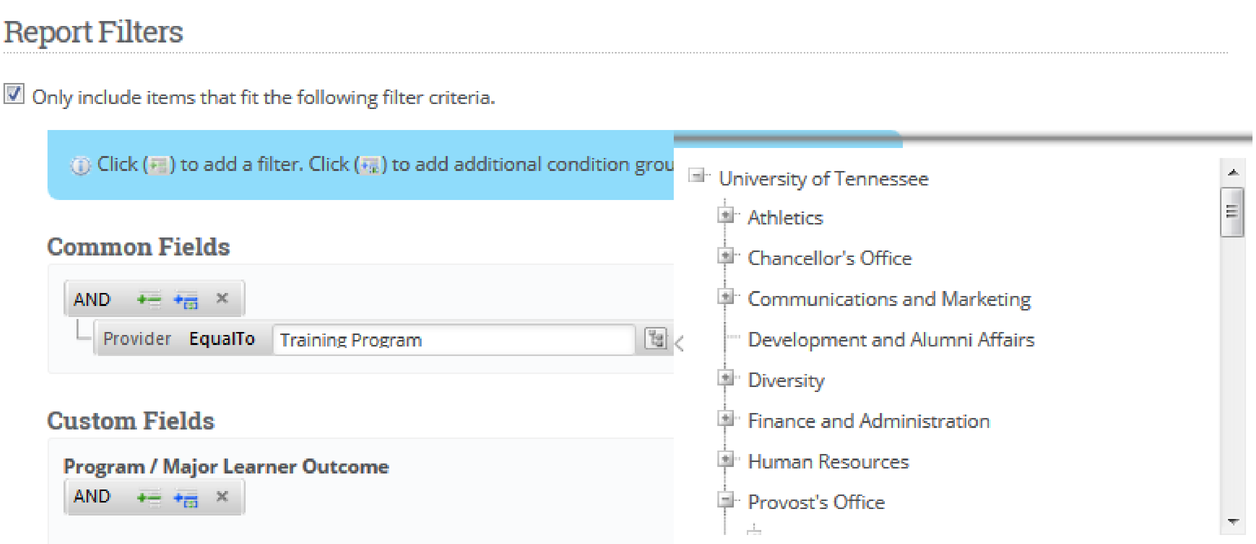
The next step is Filtering. This is where you specify the time period and program for which you need the report. This step is also useful for the administration and consultants at the Teaching and Learning Center for any summary reports they may need to run.



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:



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:



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 

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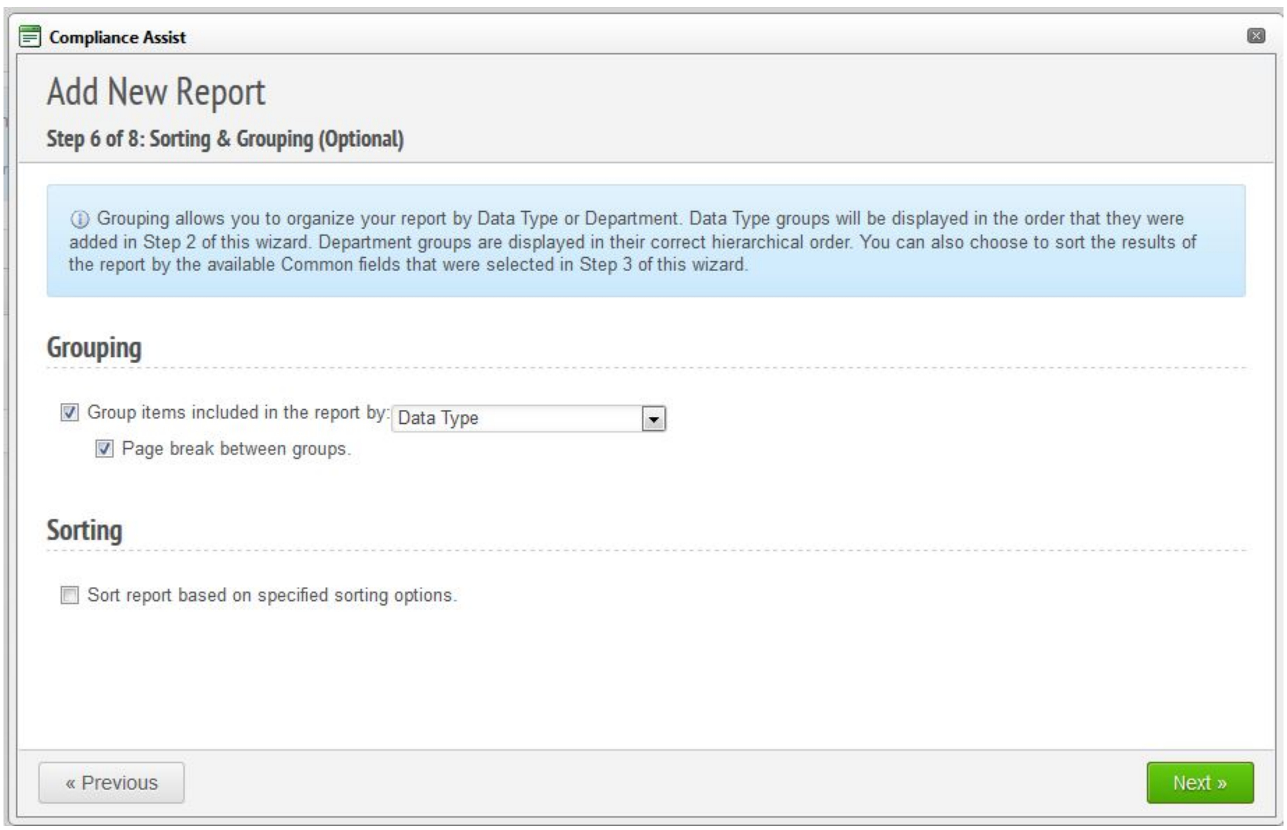
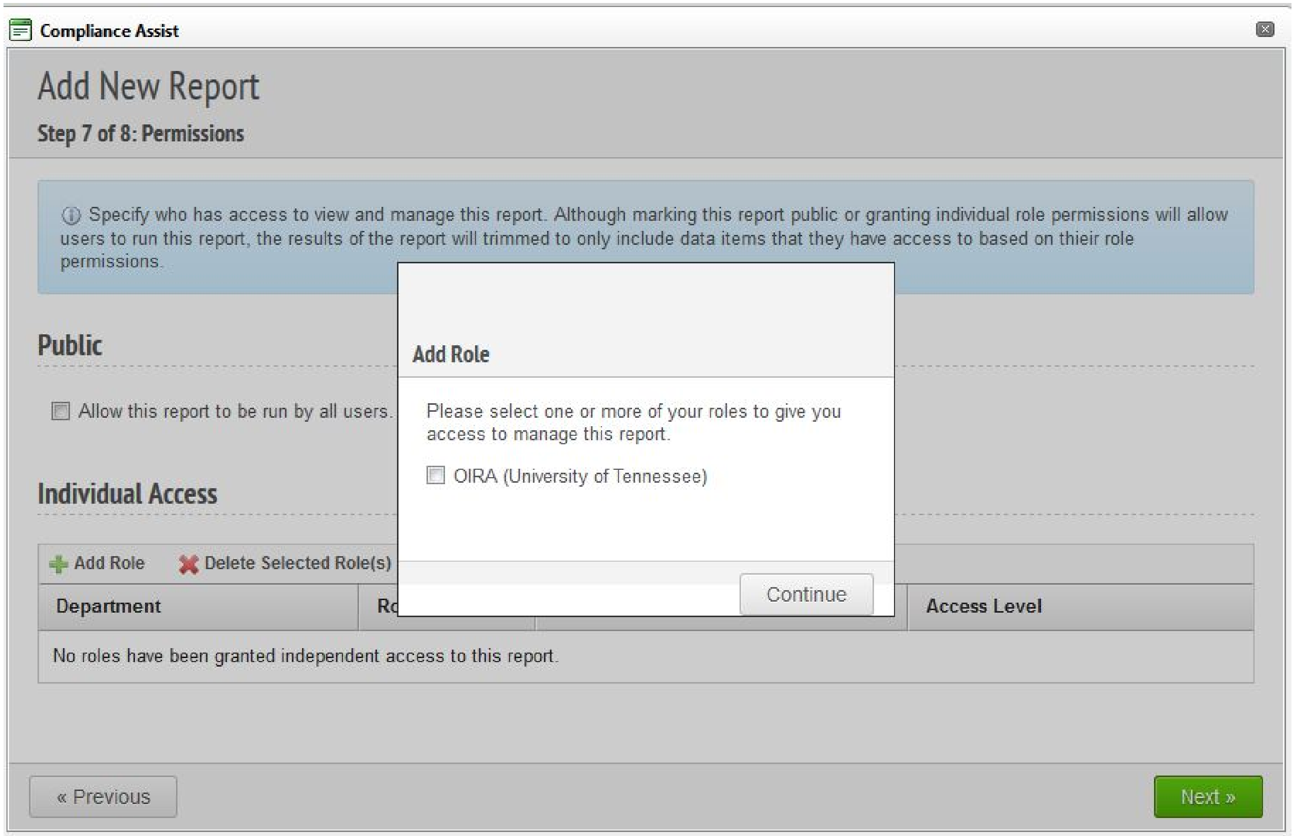
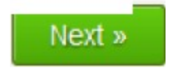
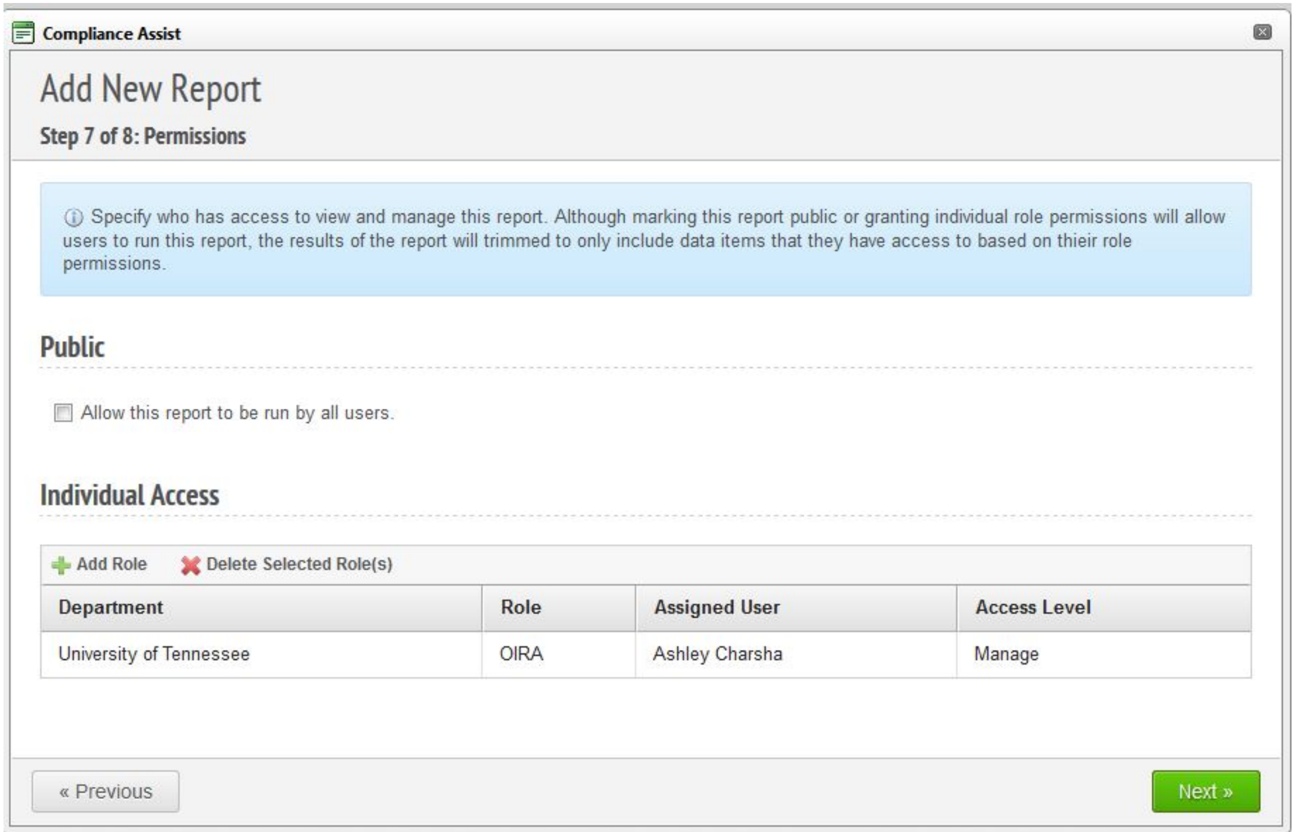
The Sorting and Grouping page is also optional and just gives you a few options to make your report look a little cleaner. One option you might want to use is "Page Break Between Groups" as it puts a little extra space in between data types in the report so it's more readable.



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."



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 



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

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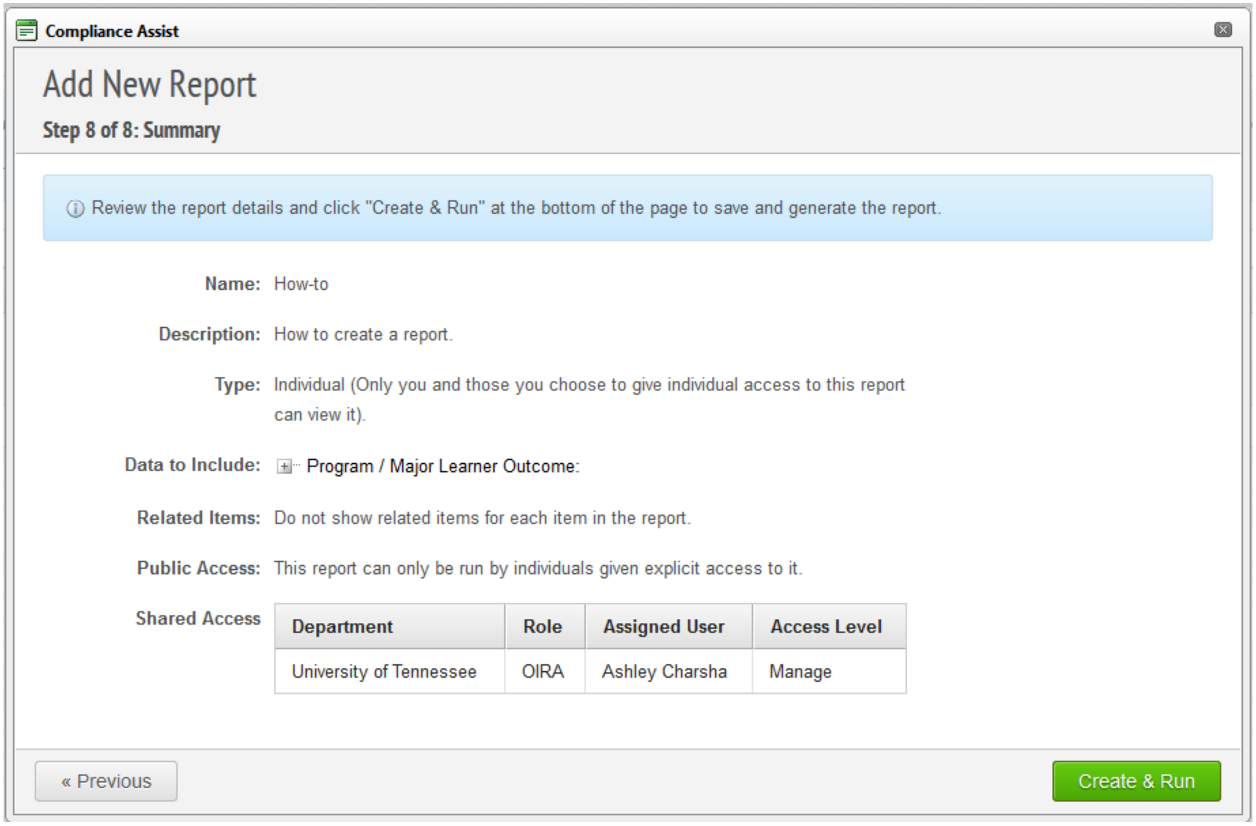
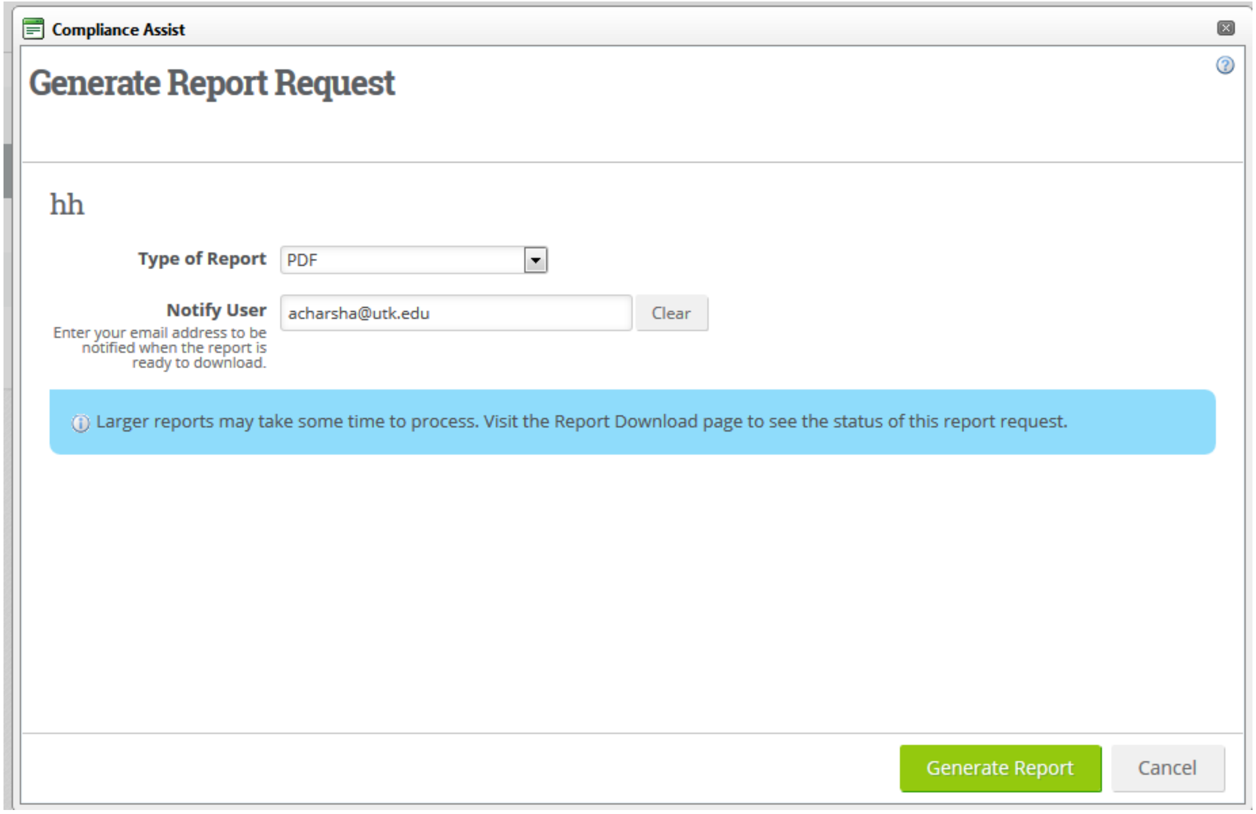


Another screen will pop up asking you to select a format for your report (PDF, Word, or Excel) and confirmation of your email. After selecting your format and confirming your email, click “Generate Report” and an email will be sent to you when the report is ready.



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.