Quick-Start Guide
Performance by DRF
Category Report
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Running a Performance by DRF Category Report

The Performance by DRF Category report shows performance for each requirement and/or category in a DRF. Reports can be generated for individual participants, all participants, or subgroups of participants. Report results can be exported to Microsoft Excel for manipulation, archiving, or both.

To begin, click TS Coordinator from the top menu bar.

From the TS Coordinator menu, click DRF Program Reports.

Then click the Performance by DRF Category Report link from the Performance/Outcome Assessment Reports section of the Reports menu.

Performance/Outcome Assessment Reports

These reports track program outcomes by requirement, author, rubric or program.

- **Performance by DRF Category**
  - 72 Saved
  - Shows outcomes for individual or group on each requirement and/or category of the DRF.

- **Performance by Standards**
  - 10 Saved
  - Shows outcomes for an individual or group based on the standards associated with rubric criteria. Note: this report requires that you associate standards with rubric criteria before running this report.

- **Performance by Rubric Criteria**
  - 65 Saved
  - (Custom Report)
  - Shows outcomes for individual or group according to custom assessment categories (standards, type of requirement, etc.) by correlating a set or sets of rubric criteria from one or multiple rubrics.
Select whether to run the report on a single DRF template or on one OR multiple DRF programs.

Select a DRF template OR program(s) on which to run report:

- Select by DRF Template
  - Select DRF Template -
- Select by Program

Select the sample on which you wish to report.

Select on whom to run report:

- All authors in one or more programs using selected DRF Template or Program(s)
- Random sample of authors in one or more programs
- All authors evaluated by a particular evaluator
  (select evaluator in next step)
- All authors grouped with a particular evaluator
  (select evaluator in next step)
- A single author
  Enter name: [ ]
- Advanced search
  (filter by specific demographic, or other advanced search criteria)
- Authors that are eligible for an outside evaluation

All Authors in one or more programs using selected DRF Template or Program(s)
This option provides a view of the names of the Programs where the selected DRF Template was used. Select the Programs you want to run reports on.

Random sample of Authors in one or more Programs
This option prompts you to select the sample size of the group you want to return. You can select to include anywhere from 1% of the Authors enrolled in the program to 50% of the Authors enrolled in the Program. You will need to choose from which Programs you want to pull the sample from.

All Authors evaluated by a particular Evaluator
This option provides a list of Evaluators in each Program using the selected DRF Template. Select the Evaluators you wish to include in your report.

All Authors grouped with a particular Evaluator
This option provides a list of Evaluators in each Program using the selected DRF Template with whom Authors are grouped. Select the Evaluators you wish to include in your report.

A single Author
Type a name in the search box provided.
**Advanced search**
This option offers search filter by demographics collected by your organization.

*Note: If your organization is not currently collecting demographic information and you are interested in exploring this possibility for filtering your reporting data, please contact Taskstream’s Mentoring Services at help@taskstream.com or 800-311-5656 and press 1 for Support for additional information.*

**Authors that are eligible for an outside evaluation**
*Only displayed as an option if this feature has been enabled.*
These evaluations are used as a basis for comparison to the original evaluation (*e.g., for measuring inter-rater reliability*). If you select this option, the next screen will prompt you to select which programs on which to run a report to compare outside evaluation with final evaluations. You will not be able to filter by date.

In the **Filter by evaluation date** area, you can choose whether you want to:

- Include all evaluations
- Include only items evaluated between certain dates

*Please note: When there are multiple evaluations for a single item, the system ONLY includes the latest evaluation.*

<table>
<thead>
<tr>
<th>Filter by evaluation date:</th>
<th>Include all evaluations (do not filter by date)</th>
<th>Include only items evaluated between:</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
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<td>Start: (mm/dd/yyyy)</td>
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<tr>
<td></td>
<td></td>
<td>End: (mm/dd/yyyy)</td>
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Click **Continue** to generate the report.
Report Results

There are three (3) main levels of report results: **Main Report** results, **Category/Requirement** results and **Author Detail**.

**Main Report Results**
The main report results will appear first. This displays a summary of all performance results in the specified DRF and Program(s) organized by category or requirement.

**Category/Requirement Results**
From the main results page, click the link (or magnifying glass icon) for a category or requirement in the DRF to view the details for that area. The category/requirement report shows the performance of the Authors who have access to the DRF area selected.
If the Program(s) included in your report has undergone changes, you can view results for earlier versions of the program(s) by selecting Revision History (Progress over Time) from the Change View menu. Click Go. Your selected filters will return results based on the total number of Authors have access to the category or requirement.

If the Programs included in your report require multiple Evaluators to complete an Author’s evaluation on an area of the DRF, from the Performance Report Detail page, you can select this view to display information on the Evaluators’ scores and the reconciliation. Your filter options return results based on the total number of Authors who have access to the category or requirement.
Author Detail Results
From the DRF category/requirement report page, click an Author's name or generate a performance report on an individual Author to access the Author Detail report. This report displays the selected Author's performance results for each evaluated area of the DRF.

Saving your Report Results
In order to save the results of a Performance by DRF Category Report for future reference, first click Save Report in the upper right-hand corner of the screen.

On the next page, enter a name for the saved results, and you can optionally give it a brief description and save it one of your Taskstream folders. If you check on the box next to “Allow Site Coordinators in your administrative area to access this report,” that will enable other TS Coordinators at your learning organization to view these report results as well. Click Save New Report when you have made your selections.
Note that if you have not specified a date range for a given report, the results will change each time you open your saved results if the DRF Program you are reporting on is still Active. If you would like the data to remain unchanged, you have to enter a date range in the report search criteria page (see above).

In order to access your saved reporting results, first return to your Program Reports page by clocking on the TS Coordinator tab at the top of your screen, and then on the DRF Programs and Reports link (see page 3 above for images). Then, click the link in red text that tells you how many reports you have saved.

Performance/Outcome Assessment Reports
These reports track program outcomes by requirement, author, rubric or program.

- Performance by DRF Category
  Show outcomes for individual or group on each requirement and/or category of the DRF.

- Performance by Standards
  Show outcomes for an individual or group based on the standards associated with rubric criteria. Notes: this report requires that you associate standards with rubric criteria before running this report.

- Performance by Rubric Criteria
  (Custom Report)
  Show outcomes for individual or group according to custom assessment categories (standards, type of requirement, etc.) by correlating a set or sets of rubric criteria from one or multiple rubrics.

From your list of saved reports, you can click either the View button, or the name of a saved report in order to see the data associated with that report. By checking the box next to Show Details in the upper right-hand corner of the screen, you toggle whether this list displays additional information such as the DRF Template and Program used in the report, as well as if you filtered the Authors according to Demographic information.

Note: Reports with the S icon are shared reports that can be viewed by other TS Coordinators in your learning community.
If you have any additional questions or comments, please do not hesitate to call Mentoring Services at help@taskstream.com or at 800-311-5656, and press 1 for Support.