AMS Reporting for Units:
Updating Outcomes: Completing Steps 4-5

Table of Contents

INTRODUCTION

Twice a year, all units report updates on their strategic plan objectives and strategies. This guide provides step-by-step instruction for successfully reporting updates on unit outcomes.
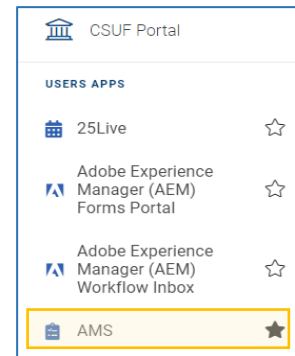
If you need support with completing an update for an outcome, please contact data@fullerton.edu.

LOGON

Use CSUF username and password to logon at https://solutions.nuventive.com or use the University portal (search for AMS Assessment Management System app).

REQUESTING AMS ACCESS

If you do not have access to AMS, please send an e-mail to data@fullerton.edu.

NAVIGATING THE AMS

Basic Navigation Icons:

This icon signifies that instructions may have been provided for that specific field, item, or area. Clicking on the icon will reveal any instructions that have been made available.

This icon signifies that options will be presented by clicking on the ellipsis. Options include: Open, View/Print, Copy, and/or Delete.

This icon is used to **Add** a **NEW** outcome, or other elements to that screen.

The **Hide Details** and **Show Details** icons allow you to choose between viewing the highlighted information as you enter information into a field, or hide the information. **Hide Details** icon allows you to hide the information. **Show Details** icon allows you to uncover the highlighted information.

The hamburger icon on the left side of the page is used to access the navigation menu. Please click on the icon to navigate.

UNIT DROP-DOWN

Use the center Unit Drop-Down to locate your Unit(s). By clicking the down arrow/caret to the right in the dropdown you will be able to locate the unit(s) that are available to you. If there are numerous units listed in the drop down, you may type in the dropdown box to quickly locate a unit.

Note: Only unit(s) the user has permission/access to will display. If the unit is not in the drop-down list, please contact data@fullerton.edu.

SPLIT SCREEN/DOCUMENTS VIEW

To the far right of the navigation bar you will find a set of icons referred to as Split Screen/Documents & Reports. Each of the icons represents the amount of space to be taken up on the screen (split-screen view) when clicking on an opening an item in the list. This feature is only available if resources exist in the space.

HOMEPAGE DASHBOARD

When you logon to the AMS, you are taken to your Homepage Dashboard which displays a snapshot of your unit's outcome status/progress. The dashboard is interactive to help explore outcome progress by Specific University Strategic Plan Goals and Objectives, Division Strategic Plan goals, report submission date, and your outcome alignment to University Strategic Plan Goals.

NOTE: Dashboards are refreshed nightly. A new entry may not be reflected in the dashboard until the next day.

You may export each visual as an excel file. To keep image as is, please screen shot.
- Hover over the triple dots to the right of the display and click for "More Options"
- From the "More Options" pop up, select **Export data**

- Select **Data with current layout** or **Summarized data** where applicable
- Click **Export**

SUBMITTING UPDATES: STEP 4-5

Note: The AMS houses both assessment and strategic plan reporting, if applicable. Please ensure you click on UNIT STRATEGIC PLAN per the instructions below to correctly submit your updates.

This guide is for existing outcomes with no changes to the Outcome (Step 1) or Methods/Measures and Criteria for Success (Steps 2 and 3). Below are instructions for completing Data Collection and Analysis (Step 4) and Improvement Actions (Step 5) only.

1. Once you locate the unit that you will be reporting strategic plan progress/updates for, click the hamburger icon on the left to reveal your navigation menu.
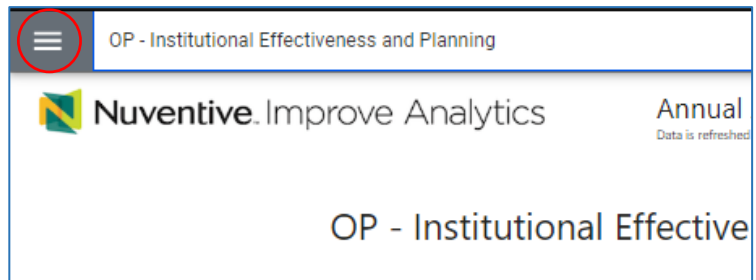
2. In the navigation menu, click on the down arrow/caret next to **Unit Strategic Plan** to expand and reveal sub-menus. Click on **Unit Strategic Plan Updates** in the sub-menu.
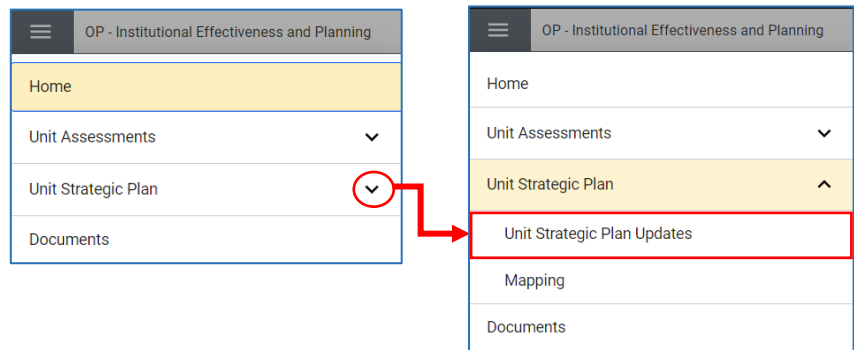
3. When you click on the Unit Strategic Plan Updates, you are taken to a list of ALL outcomes for your unit. Use the right scroll bar to locate the outcome you will be completing a report for.

4. Double click directly on the outcome that you will be reporting on for the period or click on the ellipsis ⋮ to the right of the outcome and click "**Open**" from the dropdown.
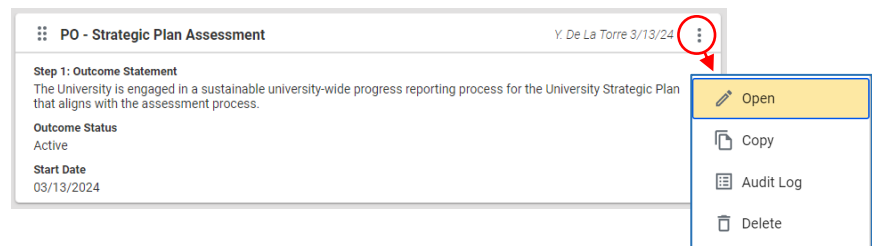
   NOTE: By default, both active and inactive outcomes will display. Use the filter dropdown/caret if you would like to filter Outcome Status by "**Active**" or "**Inactive**".
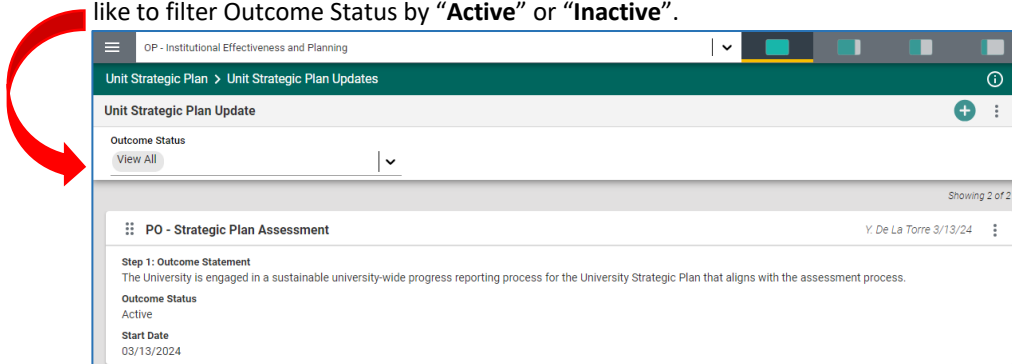
5. You may review **Step 1: Outcome Statement** and **Steps 2 & 3: Methods & Measures** by clicking directly on each tab. These reflect your Strategic Plan Assessment Plan and should remain static across reporting cycles.
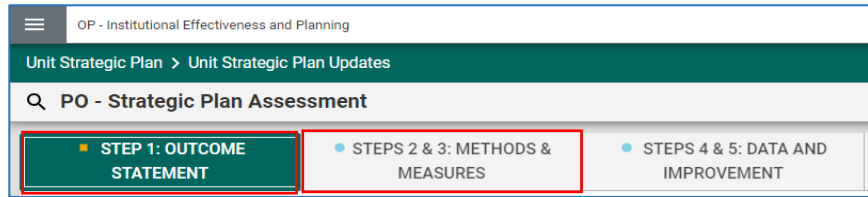
IMPORTANT: If changes are needed to your Outcome (Step 1) or your Methods and Measures (Step 3), **DO NOT** create a new entry, nor delete any entries that have been used in prior cycles. Please contact our office at data@fullerton.edu for assistance with retiring the outdated Methods and Measures BEFORE making any changes.

If no changes are needed to your **Outcome (Step 1)** and **Methods and Measures (Steps 2 & 3)**:

6. Click on **Steps 4 & 5: DATA AND IMPROVEMENT** tab.

7. You may see a history of reporting entries by cycle year. Any filter settings you selected in prior steps will transfer over. In this example, the filter was set to "Active" to filter out any Inactive outcomes. Use the filter drop downs to change the setting as needed.
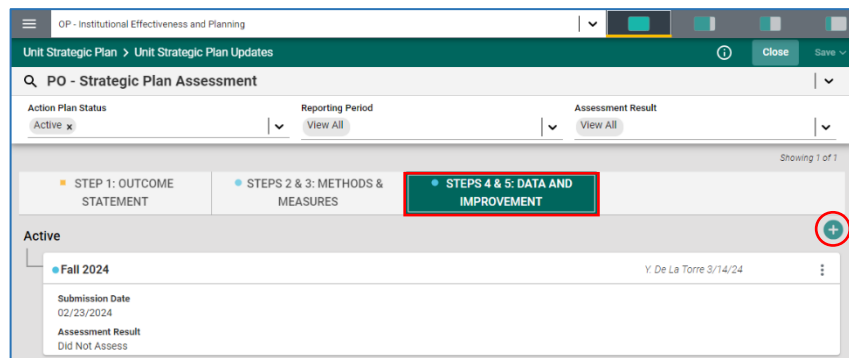
Click on the green circle plus (+) sign ⊕ to submit your updates for the current/new reporting period.

The **Steps 4 & 5: DATA & IMPROVEMENT** form will display.

NOTE: Fields with an asterisk (*) are required, and you will not be able to **Save** the information until all required information has been entered.
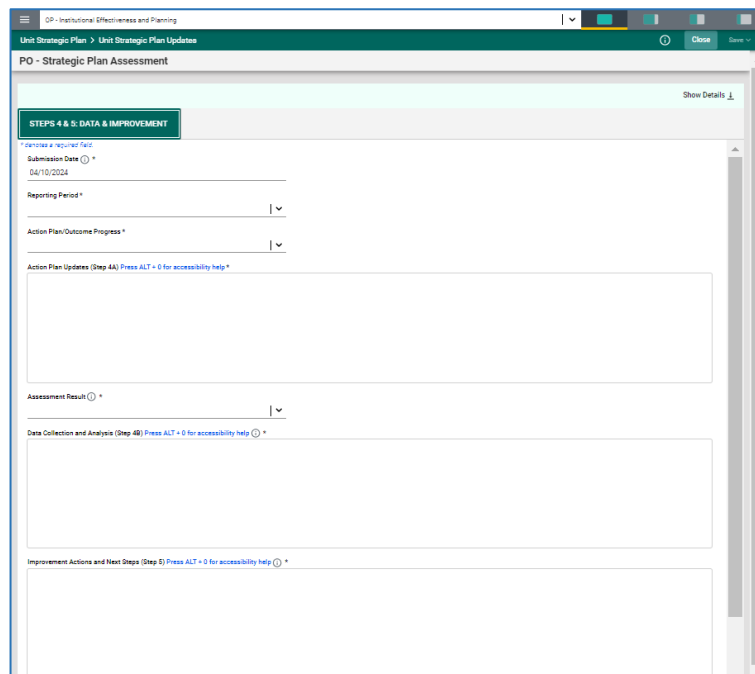
8. Enter information into the following fields:
    - **Submission** Date*: This field will auto-populate with the current date.
    - **Reporting Period***: Enter the term for which you are updating the objective using the dropdown menu.

- **Action Plan/Outcome Progress***: Select from the following using the dropdown menu:

  - **Completed:** All actions/strategies have been completed for the outcome
  - **On-Track:** Actions/strategies have been implemented and progress is on track
  - **Delayed:** Implementation of actions/strategies has been delayed
 - **Cancelled:** All actions/strategies have been cancelled

- **Action Plan Updates (Step 4A)***: Click in the text box and the toolbar will appear, similar to a Word document toolbar where you can change text, cut and paste from a Word document. This field accepts limited rich text (e.g., bullet points, but not tables or graphics). In this field, provide updates to the action plan by specifying the degree to which the action plan steps were taken.

  NOTE: DO NOT type only "see attached". The expectation for this field is to summarize any progress made or actions taken in reference to the action plan (e.g., were workshops held, was the committee established, was the new software or process implemented, were constituents communicated with).

- **Assessment Result*:** Use the dropdown menu to select "**Assessed and Not Met**", "**Assessed and Met**", or "**Did Not Assess**". This field is specific to your assessment and should be determined using the data collected and your criteria for success.
  - **Assessed and not met:** Data was collected per the unit's assessment plan, and at least one criteria of success was not met.
  - **Assessment and met:** Data was collected per the unit's assessment plan, and all criteria of success were met.
  - **Did not assess:** Data was not collected per the unit's assessment plan.

- **Data Collection and Analysis (Step 4B)***: Click in the textbox and the toolbar will appear, similar to a Word document toolbar where you can change text, cut and paste from a Word document, insert a table, link to an outside source (URL), and add a graphic/picture.

  NOTE: **DO NOT** type only "See attached". The expectation for this field is to summarize the data collection process, data analysis, and interpretation of assessment findings (e.g., how do these results inform practice, how do results compare to prior assessment results, what are the trends if this is the first time the outcome is assessed, indicate so).
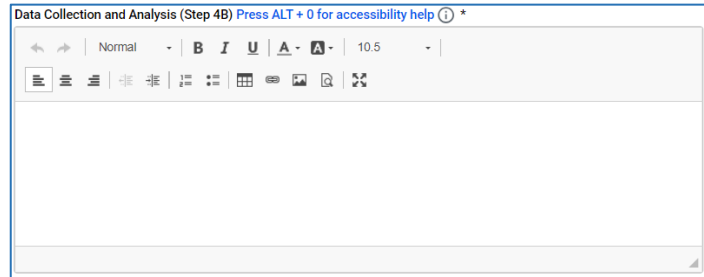

  Considering using the Strategic Plan Progress Indicator(s) to inform your analysis of the findings.

- **Improvement Actions and Next Steps (Step 5)***: Type text into the textbox. This field accepts limited rich text (e.g., bullet points, but not tables or graphics).

  NOTE: DO NOT type only "See attached". Improvement actions should tie to assessment results and action plan updates. Best practices include addressing improvement actions even when assessment criteria were "met".

  Examples include: How results get disseminated to students, faculty, staff, administrators; were there areas that need to be addressed or further looked into in response to findings; who will carry out the improvement actions (if any); time frame for

  implementing the improvement actions (if any); timeframe for re-assessing the improvement actions (if any); next steps in the action plan.
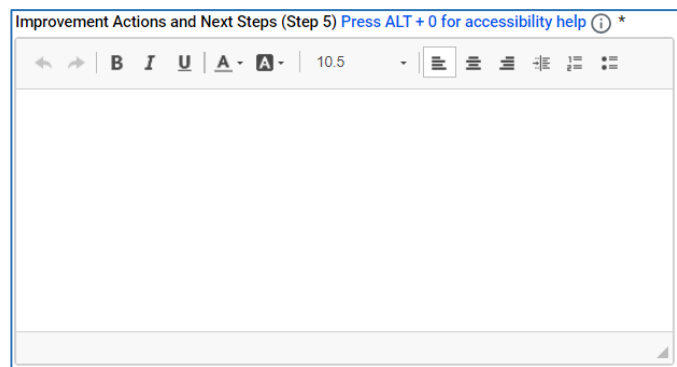
9. **Optional**: You may attach a supporting document to the update by uploading it to the document repository.

   - Click the green circle **plus** (+) ⊕ sign.

     The following screen will appear. In this example, the primary folder is OP – Institutional Effectiveness and Planning.
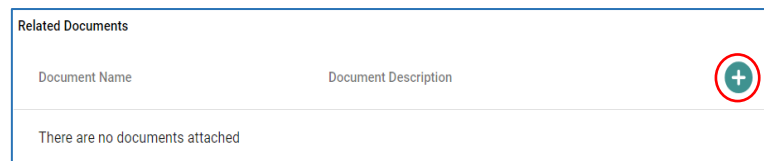
   - Click on the **primary** folder to open the Document Library sub-folders.

     Sub-folders will appear where prior documents may have been uploaded. Or you may see a 'General' folder only. Click the sub-folder name that you would like to upload your document to.
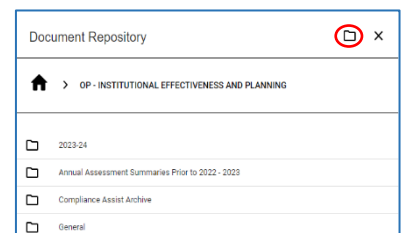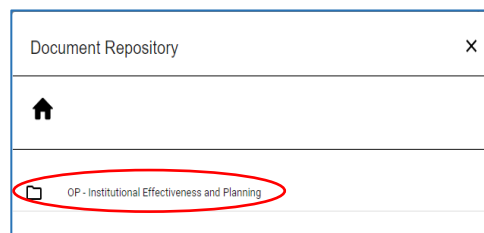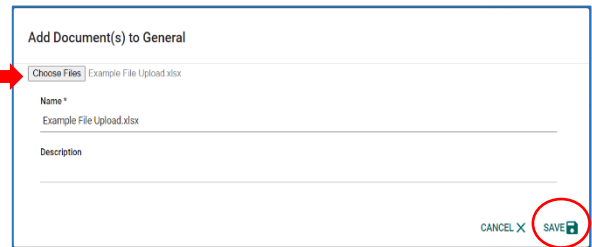
Option: You may also create a new folder (click on the folder icon- top right corner).

In this example, the General Folder is selected. You will be adding a new file to relate to your strategy.
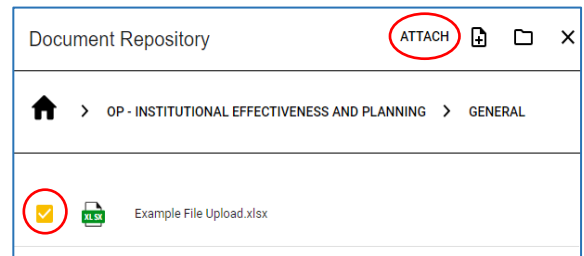o Click on the **Add File** icon to attach document(s).
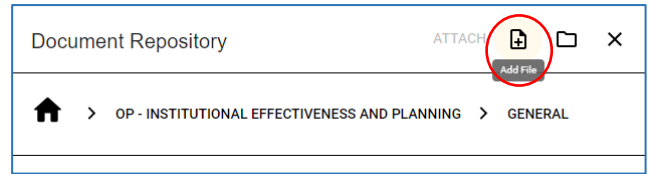
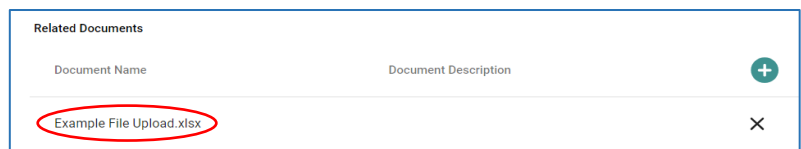o Click **Choose Files**, then browse and select a file from your computer.

o Click **SAVE**.
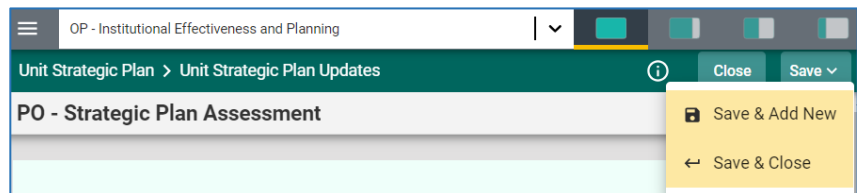The file has been uploaded to the "General" folder.

o **Check the box** next to the file to select. You may select multiple files. Click **ATTACH**.

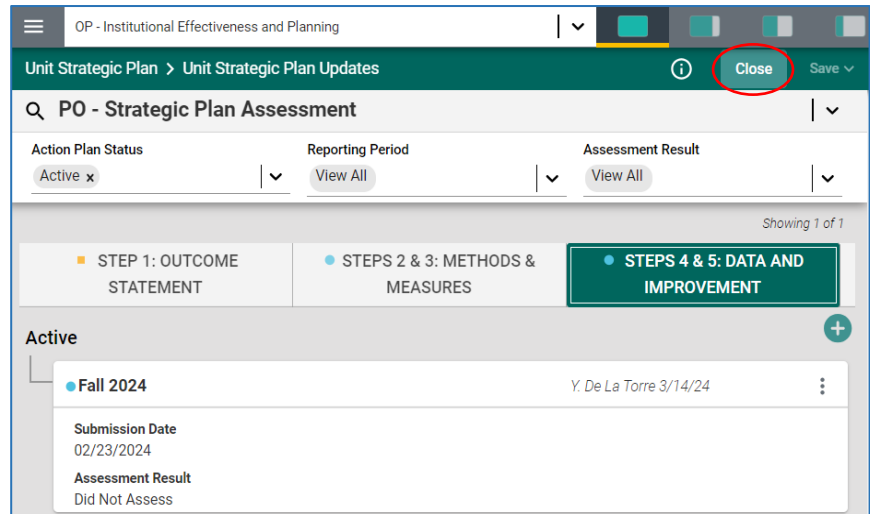The file appears under **'Related Documents'** in the Steps 4 & 5 entry for the outcome.

o When done entering Steps 4 & 5: Data & Improvements, use the Save dropdown and click **Save & Close.**

You are returned to the assessment reporting history view for the outcome and you should see your submission has been added.

10. Click **Close** to return to the Outcomes view.

11. You are returned to the Outcomes view. You may now repeat the process for the next outcome or click the hamburger icon to return to the home page.