EVMS Annual Unit Assessment Reporting
Weave User Guide

This document is intended to provide guidance for the use of Weave software in the creation and completion of annual unit assessment plans and reports. It is a technical guide, and is not intended to help the user understand the annual unit assessment planning and reporting process or content. Separate guidance on these topics can be requested from the Strategic Planning and Institutional Effectiveness office.

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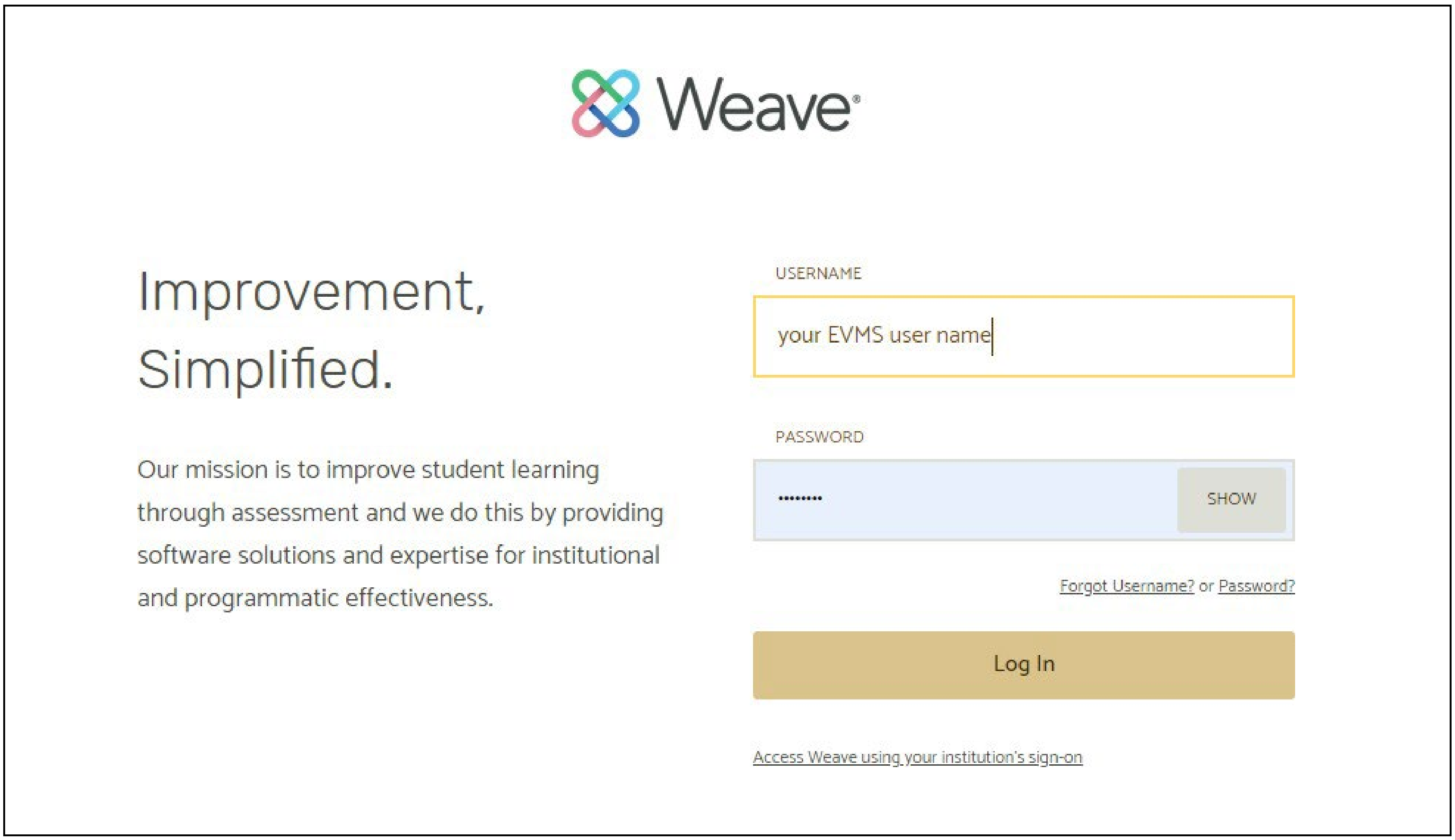
Section I: Signing in to Weave

The first step to creating and completing your annual unit assessment report in Weave is, of course, to sign into the system.

Signing In

Step 1: Sign into Weave using the following URL: https://app.weaveeducation.com/login/

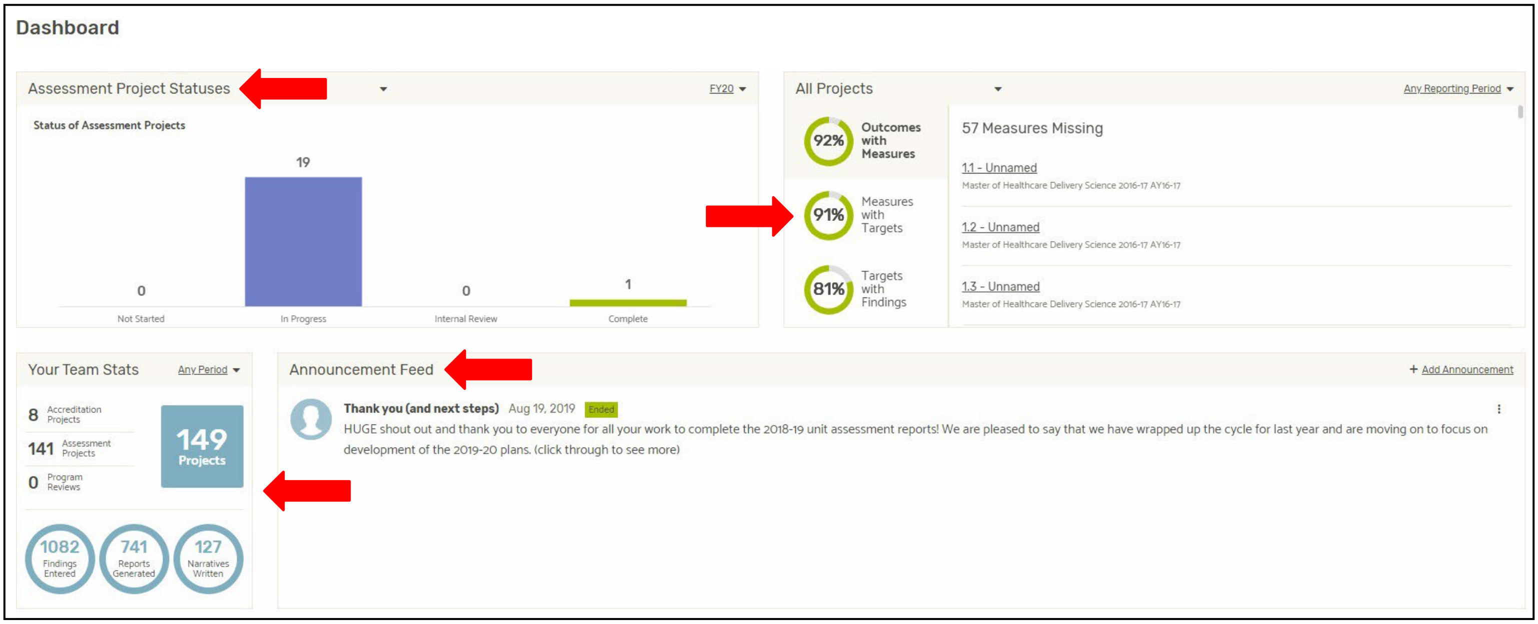
When you access this page, you will see the following user and password prompt. Enter your user name and password for Weave, which you would have set up when you received your original invitation to accessing the Weave system.



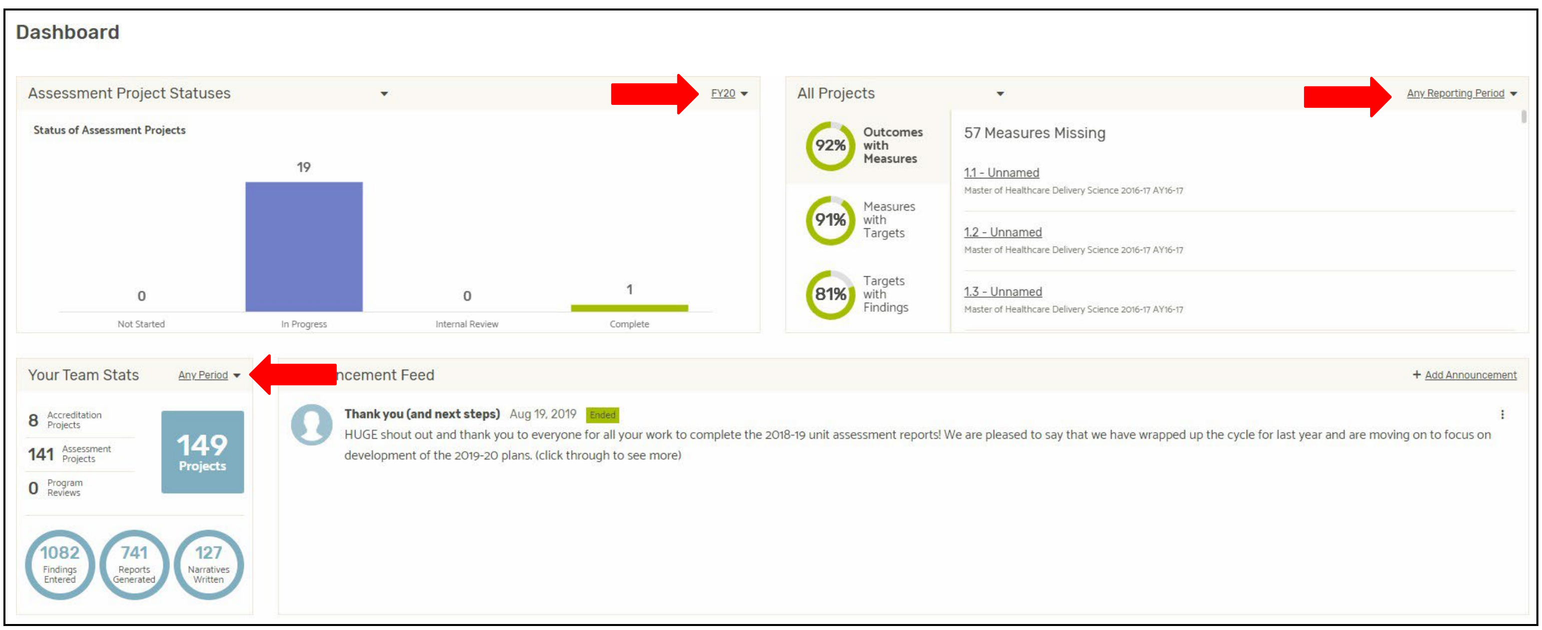
Step 2: Upon signing in to the Weave system, the first thing you will see is a dashboard containing information about all the projects to which you have access. For some, this will be only projects for your specific unit. For executive management with more than one unit reporting to them, you will see information for all the units associated with your area.

On this dashboard, you will find an overview of the status of your project(s), general statistics on all projects in your area, a variety of content completion measures, and any announcements from the Weave administrators.

Please note that what you see throughout this document may vary slightly depending on your access, including the possibility you may not see some items



You can filter the information on this dashboard by reporting period to look at projects for specific assessment cycles.

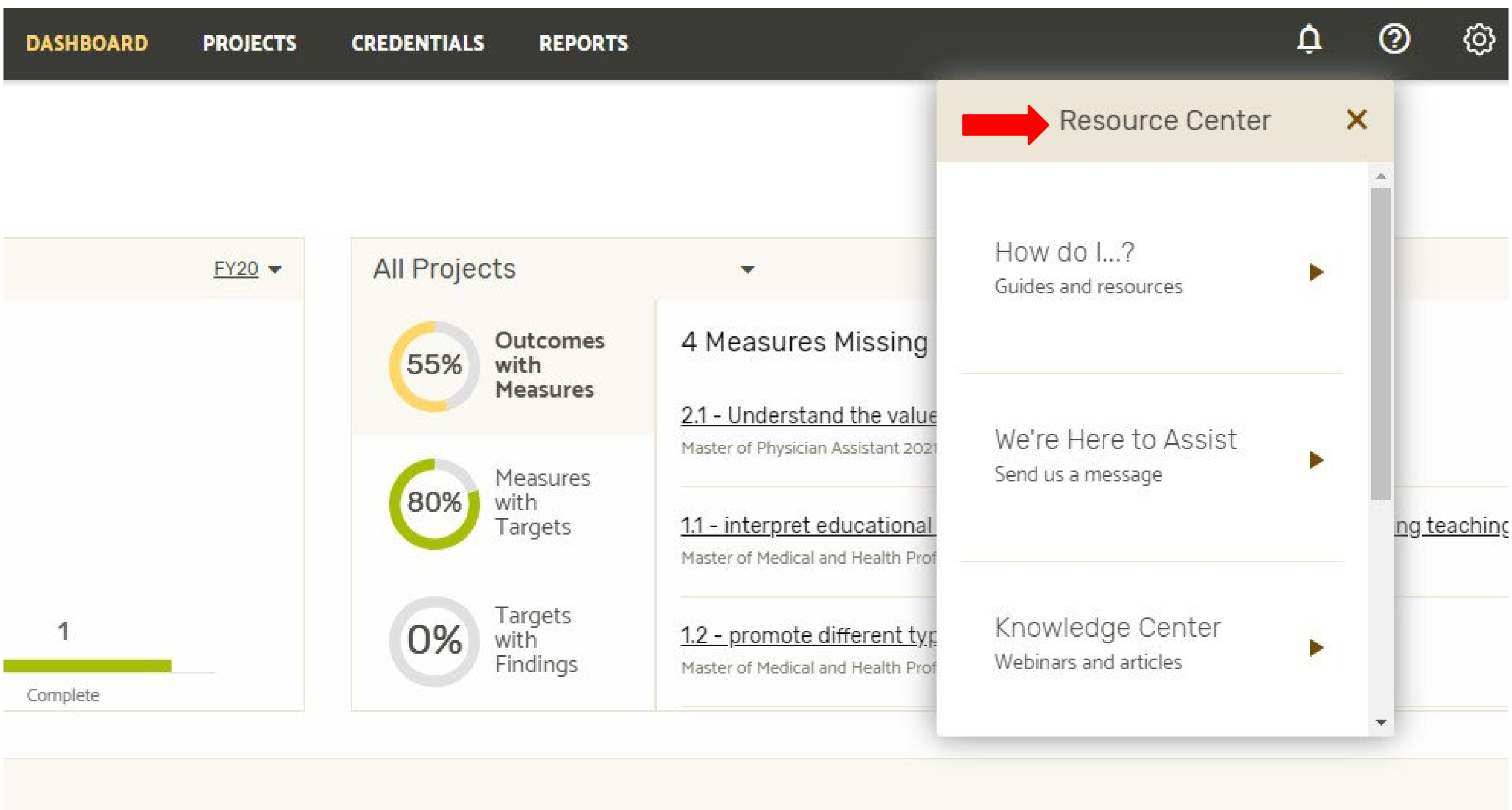


Step 3: At the top of the page, you will find a navigation bar that you can use to navigate between Weave sections. Your bar may not have all of the items below, depending on your access, but you should be able to move back and forth between your dashboard, projects, and reports as needed.

Step 4: In addition to being able to navigate your projects, you will also find some general functions to the right of your navigation bar, including an announcements indicator (bell icon), the help function (question mark icon), and your settings (cog icon).

<u>Accessing Weave Technical Assistance</u>

Weave provides the technical help for the system, not EVMS. If you need assistance with technical issues in the system (versus process or content help, for which you can reach out to the Strategic Planning and Institutional Effectiveness office), clicking on the question mark icon in the top right corner of the navigation bar. This will open drop down access to the Weave Resource Center, which offers multiple Weave help-related functions, including the ability to search prepared webinars and articles and to submit a message to Weave for personal assistance.



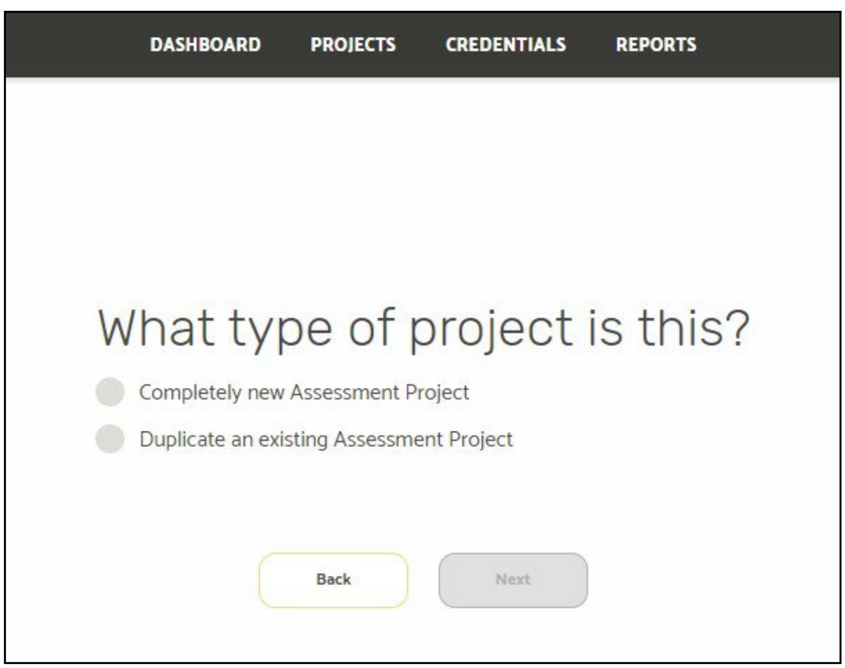
Section II: Creating a New Project

Now that you have accessed and explored the Weave system, it is time to create a new project. There are two approaches to creating a new project at the beginning of new assessment cycle- creating a completely new project from scratch, or copying an already existing project from a previous cycle. Creating a completely new project will be discussed first.

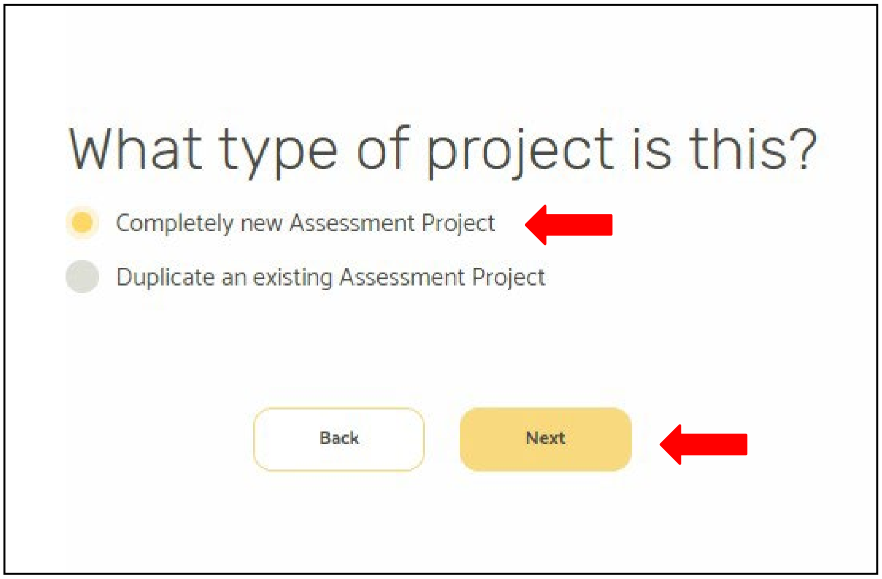
Creating a Completely New Project

Step 1: Create a new project for the assessment cycle (option for fiscal or academic year available) by going to the "*Projects*" tab at the top of the page, and then selecting the button that says "*Create New Project*" in the top right corner of the page.

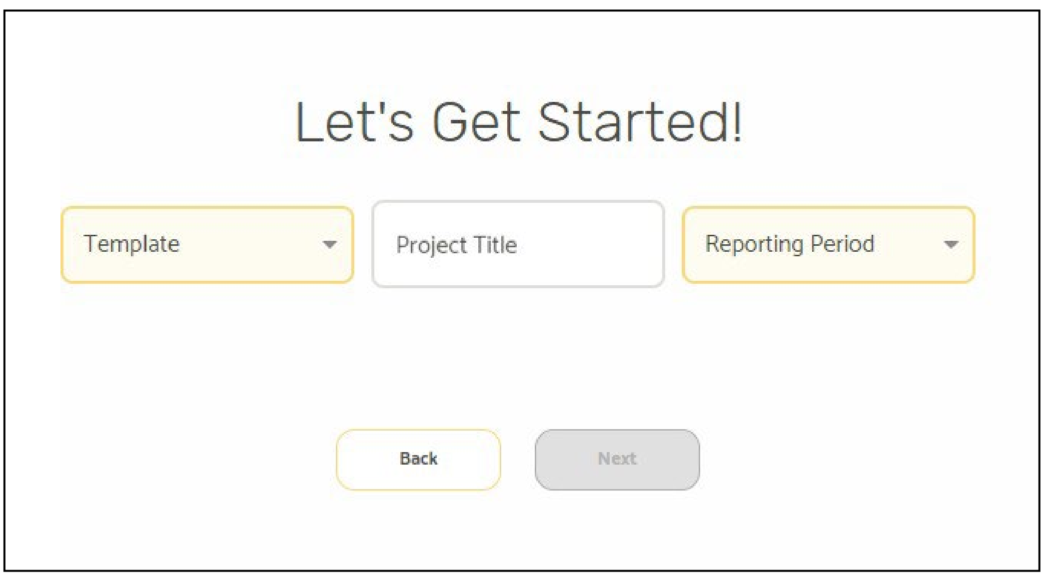
Step 2: When you select the "*Create New Project*" button, you will be presented with two options: Creating a completely new project, or creating a new version of an already existing project. The following instructions will guide you through creating a completely new assessment project first, then duplicating an existing assessment project.



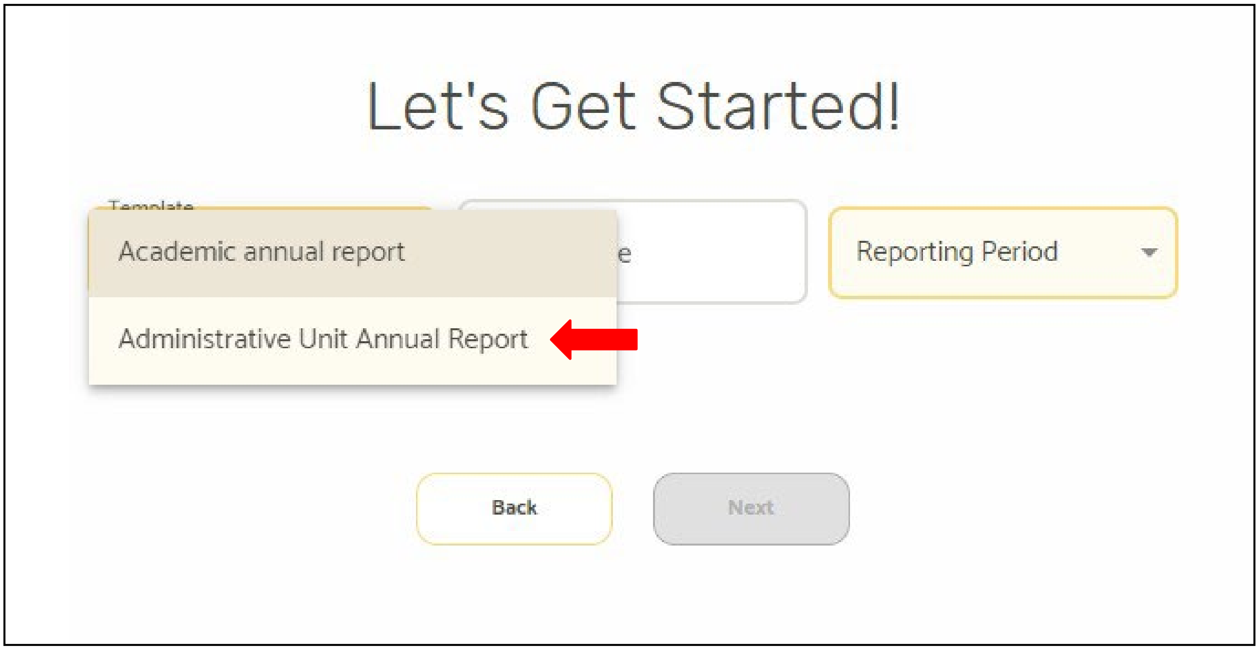
Step 3: To begin a new, empty assessment project, select the "*Completely New Assessment Project*" option and click "*Next*".



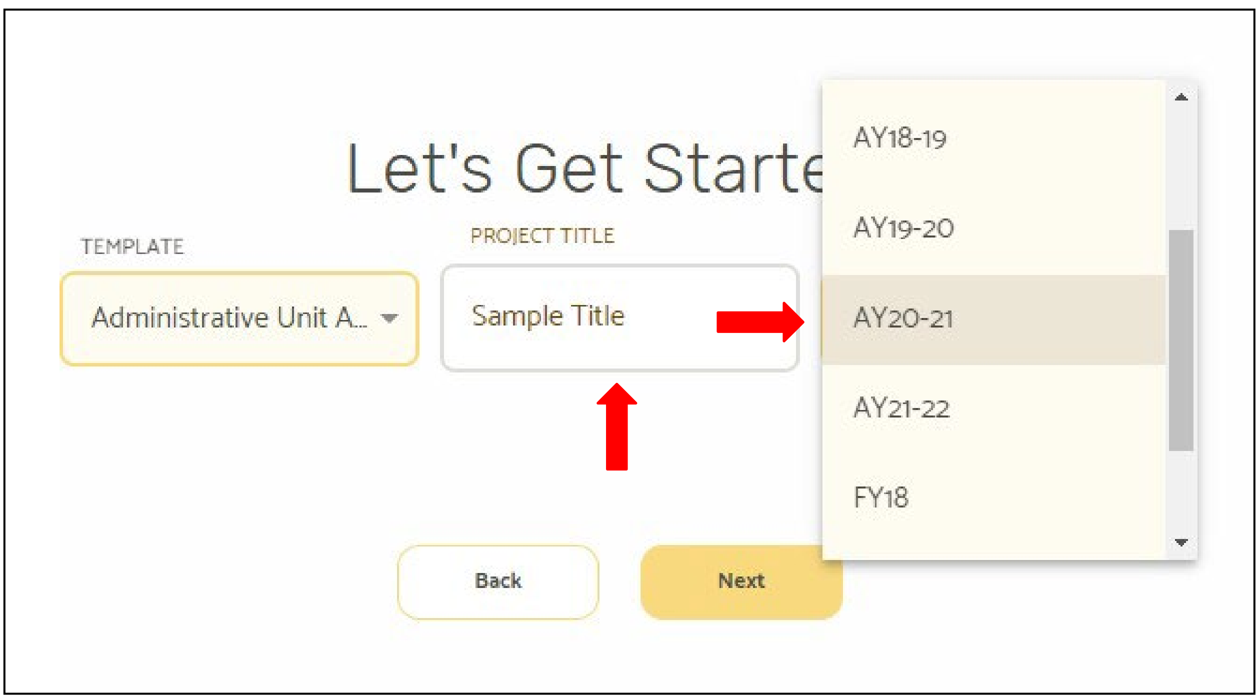
Step 4: The next screen will give you the options to select a project template, give the project a title, and select the appropriate reporting period for the new project. As mentioned earlier, you can select either an academic or fiscal year as the reporting period, depending on which is most applicable to your unit's annual schedule. If a reporting period you need is not available, please contact the Strategic Planning and Institutional Effectiveness office to have a new reporting period added.



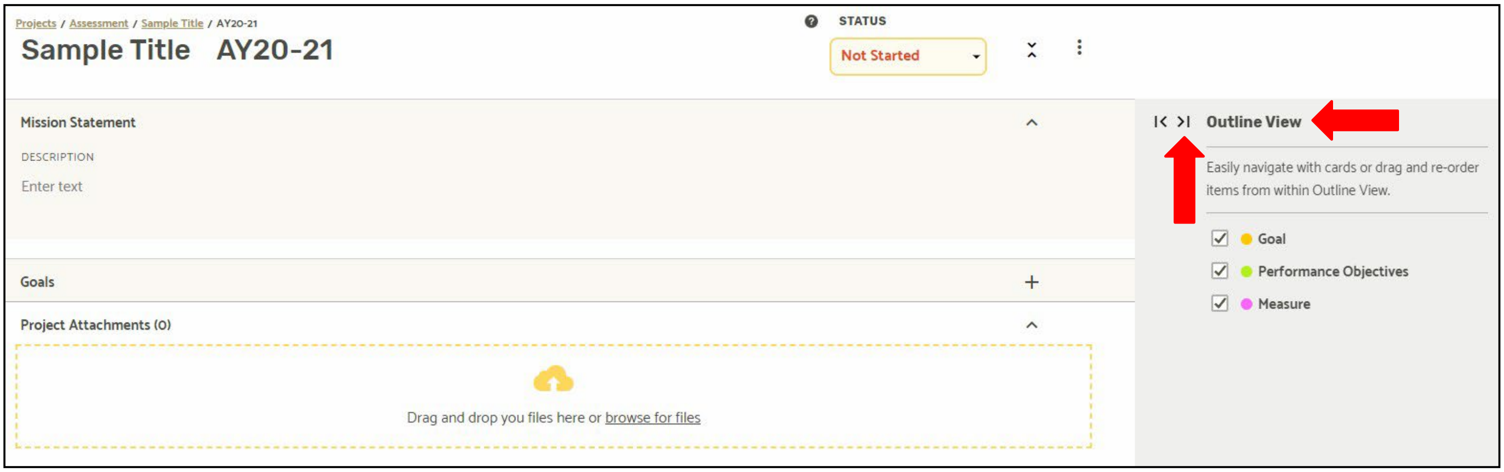
Step 5: For administrative units, select "*Administrative Unit Annual Report*" from the template option drop down box.



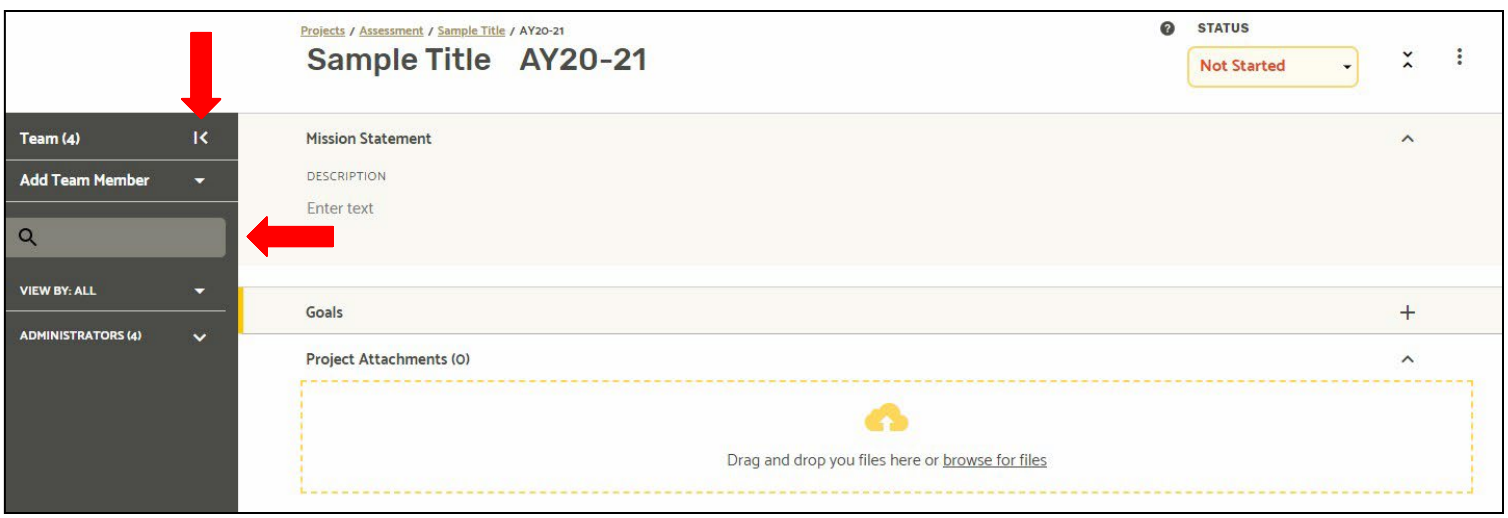
Step 6: Give your project a title (usually your unit name) and select the appropriate reporting period from the drop down for the current/upcoming unit assessment cycle and hit "*Next*".



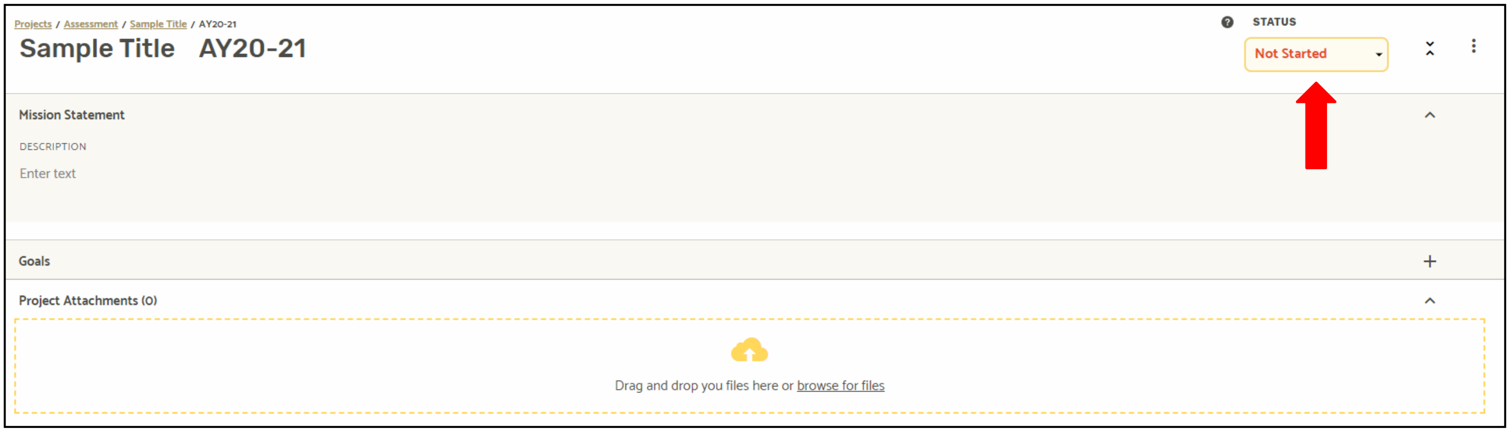
Step 7: The first time you access the new Weave project interface, it will be useful to review the new layout, as it varies slightly from the 2019-20 design (though the content options remain the same). The first thing you will see is the "*Outline View*" panel on the right side of the frame. It allows you to customize the sections of your project if you find it useful to focus on certain areas at a time. You can click on and off in the check boxes to limit what you see at a given point in time. You can also hide this panel by clicking on the right arrow to the left of "*Outline View*".



Step 8: On the left side of the frame, you will see a panel that allows for management of your team members and institutional staff who can view and edit your plan/report. You may not be able to edit all of this yourself, depending on your account settings, and if you need assistance with adding or removing members, contact the Strategic Planning and Institutional Effectiveness office. You can hide this panel by clicking on the arrow to the right of "*Team*".



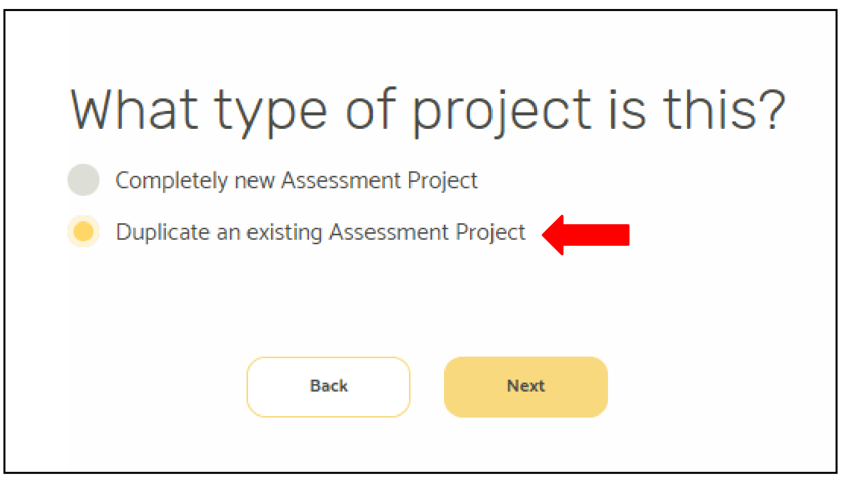
Step 9: Your new project at this point will be completely empty of content, and will have "*Not Started*" as the status in the upper right corner of the page.



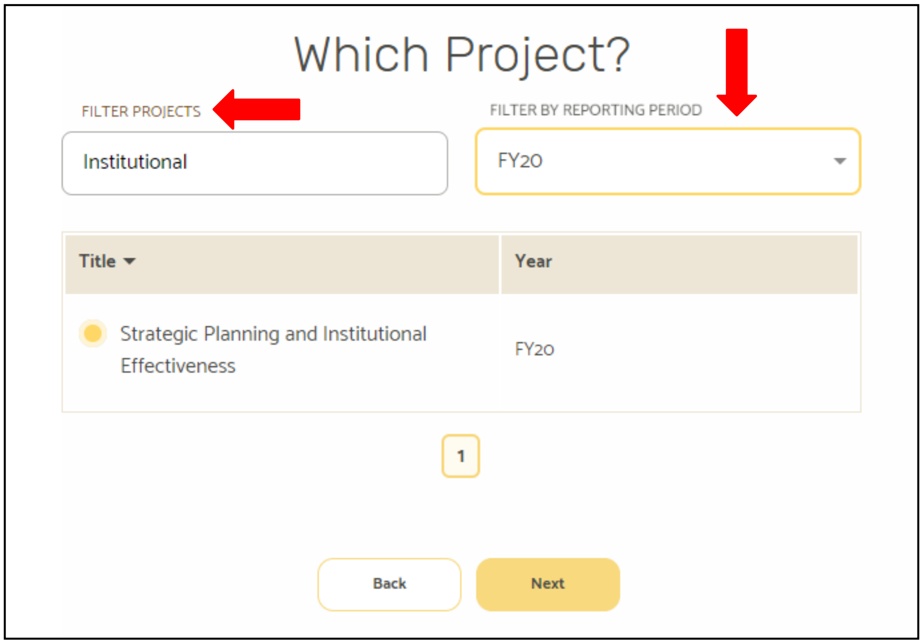
Now that you know how to create a completely new project in Weave, the next section will provide instructions on how to create a new version of an existing project.

Creating a New Version of an Existing Project

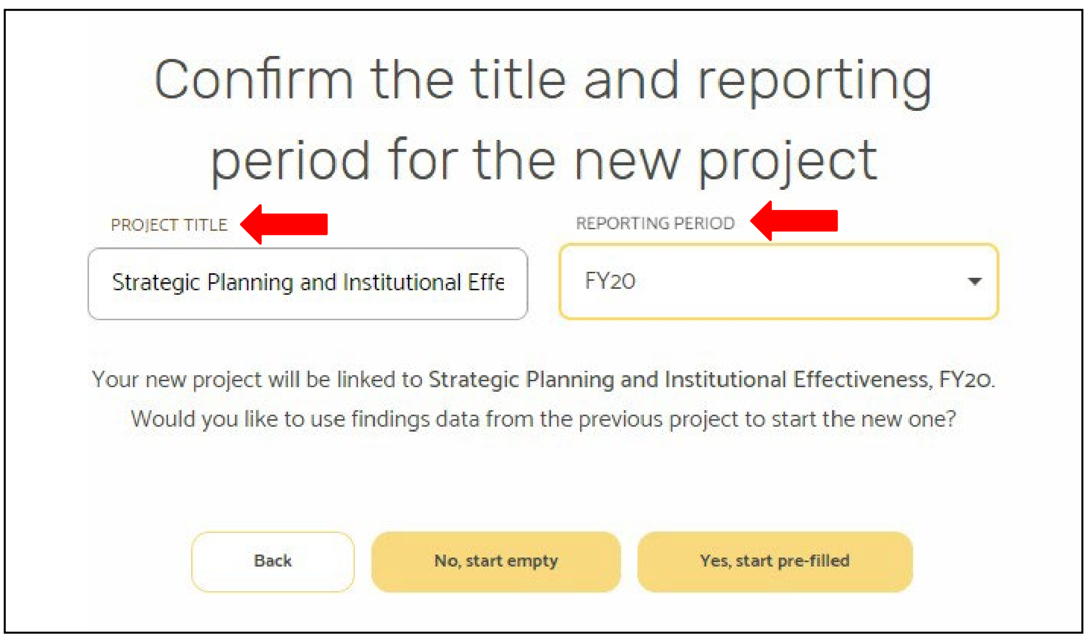
Step 1: To begin creating a new version of an existing project, follow steps 1 and 2 explained earlier. On the screen that gives you the option of what type of project you would like to create, this time select "*Duplicate an Existing Assessment Project*".



Step 2: When you select "*Duplicate an Existing Assessment Project*", you will then be asked to select which project you would like to copy, with a of list all currently available projects. The screen will give you the option to filter for the name of an old project to allow for easier searching. As you see in this example, filtering for the word "Institutional" narrows the projects to "Strategic Planning and Institutional Effectiveness". You can also then select the project year you want to use from the drop down list, if you have more than one year of assessment projects already in Weave.

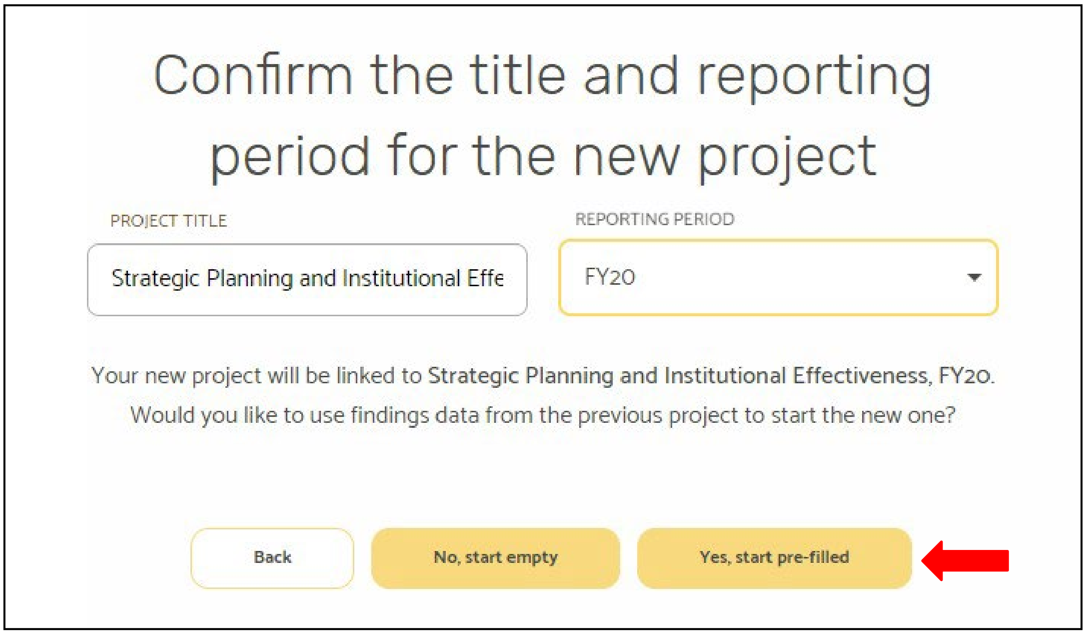


Step 3: When you hit the "*Next*" button at the bottom of the page, you will be directed to a new page to confirm the title and reporting period for the new project. It is suggested you leave the project title the same as previous years for consistency, and you can change the reporting period to reflect the new assessment cycle year, academic or fiscal.

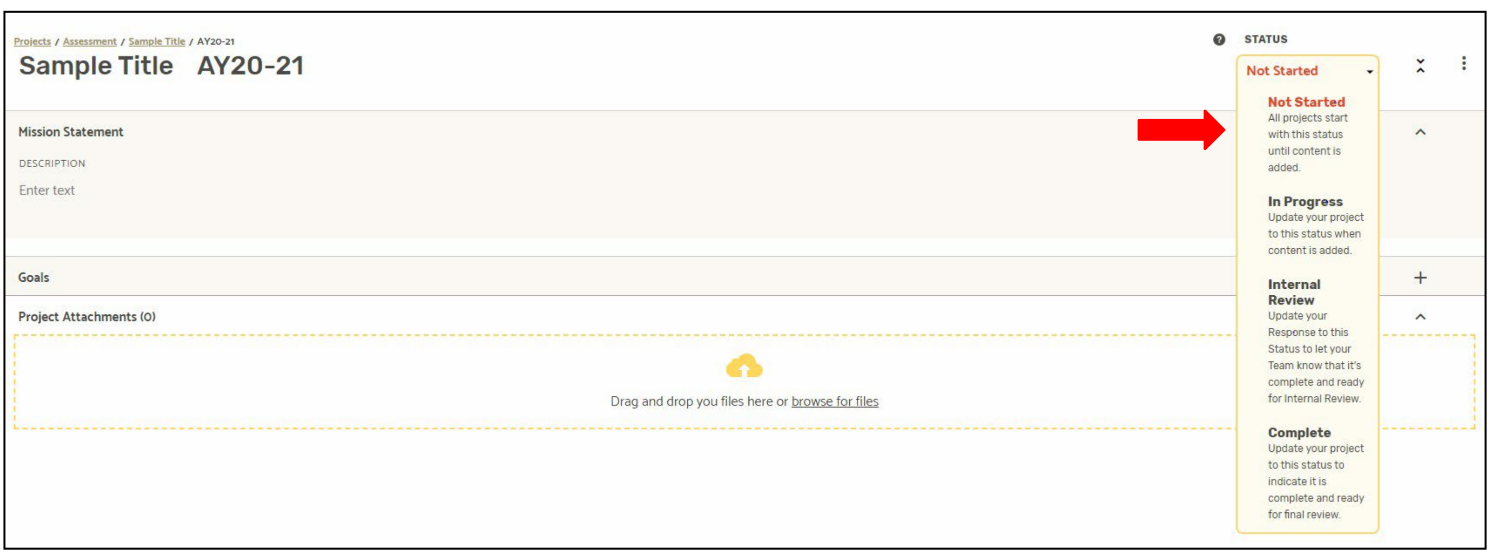


Step 4: Below the project title and reporting period selection, you will be asked if you would like to copy the project with no content from the previous year ("No, start empty") or copy it with all of the information from the original project ("Yes, start pre-filled"). This decision is up to you, but if more of your content is consistent from year to year, it may be easier to start with it pre-filled and edit content to align with the new cycle. If your unit has more initiative-driven content that varies from year to year,

it may make more sense to start with an empty report. Please note that while most of the content comes over, not all does (ex. "strategic initiatives") so be certain to ensure your new project contains all necessary components when complete.



Step 5: If you elected to start with a pre-filled project, your template outline will contain your content from the previous report. If you elected to start with an empty project, the content will be empty and the status will say "*Not Started*". When you begin to enter content into the project, change this status to "*In Progress*". Your project will remain in this status until the end of your unit assessment annual cycle when the results, findings, and improvements are entered.



Section III: Entering Content into Your Project

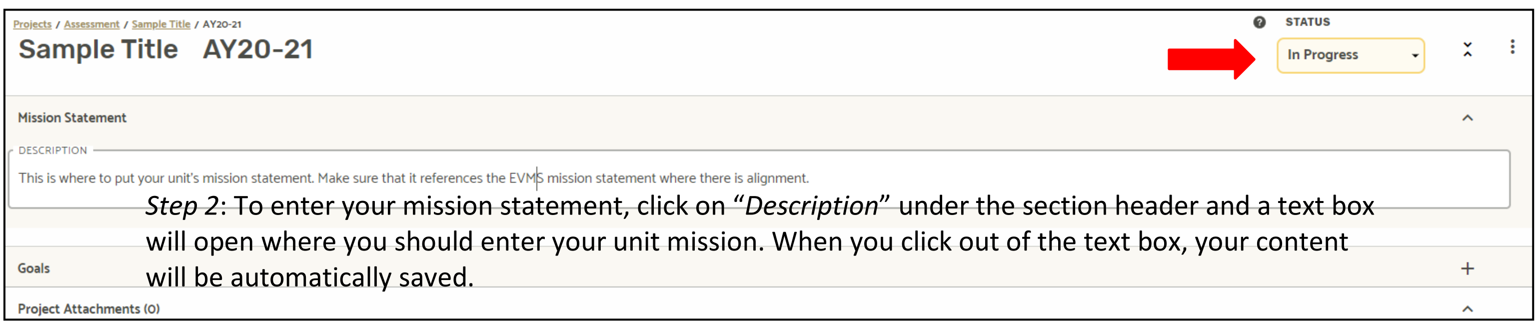
Now that you have created a new project, or copied over an existing project, you are ready to enter your annual unit assessment plan content. The following section will guide you through the various sections of the Weave report you will need to complete to finish the planning phase of your annual cycle.

The following steps will walk you through creating one goal with all of its tertiary components based on starting with a completely new project containing no content. The process for completion remains the same for completing a project that was copied from a previous assessment cycle except that it will have content already in it, which you will edit as appropriate instead of entering entirely new content into blank fields.

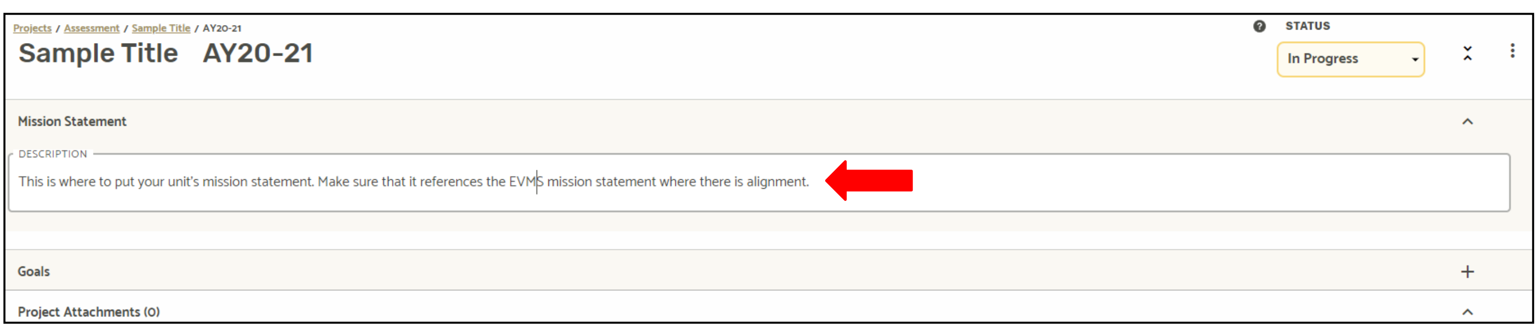
Please note that Weave auto-saves your entered content, so there is no "Save" button.

Entering Your Mission Statement

Step 1: When you enter your first content, you can then set the project status to "*In Progress*" as outlined above.

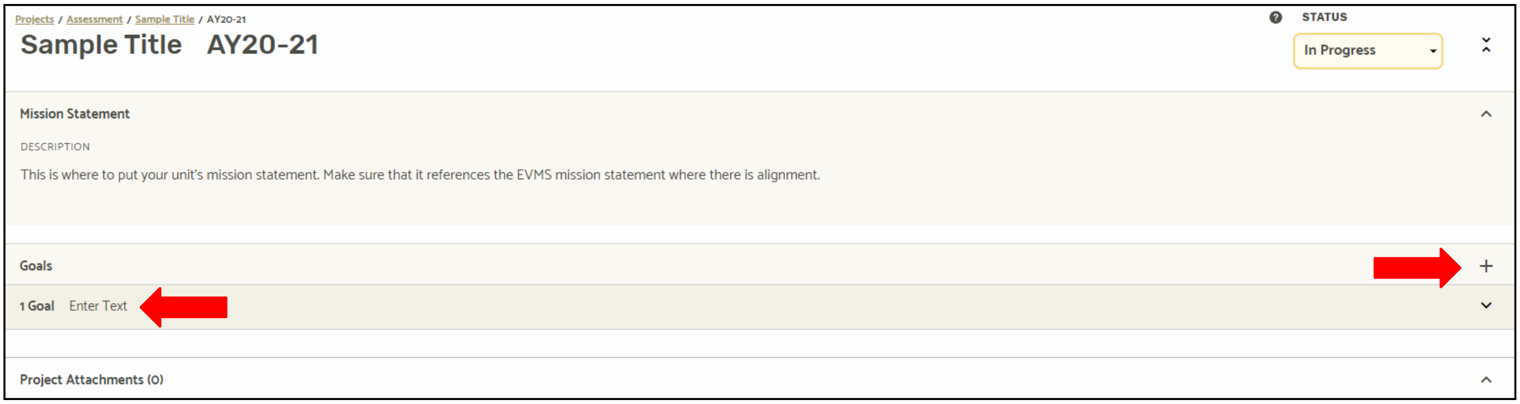


Step 2: To enter your mission statement, click on "*Description*" under the section header and a text box will open where you should enter your unit mission. When you click out of the text box, your content will be automatically saved.

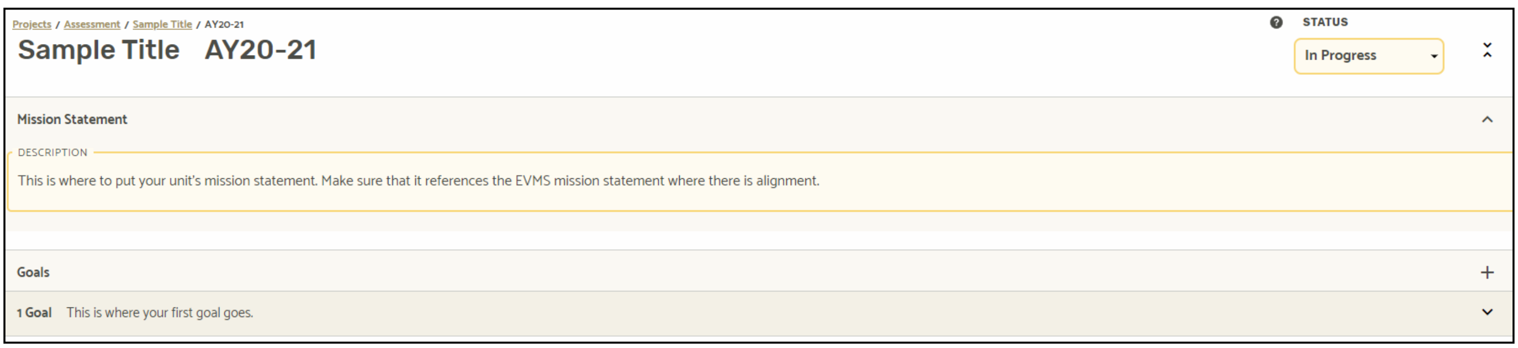


Entering Your Goals

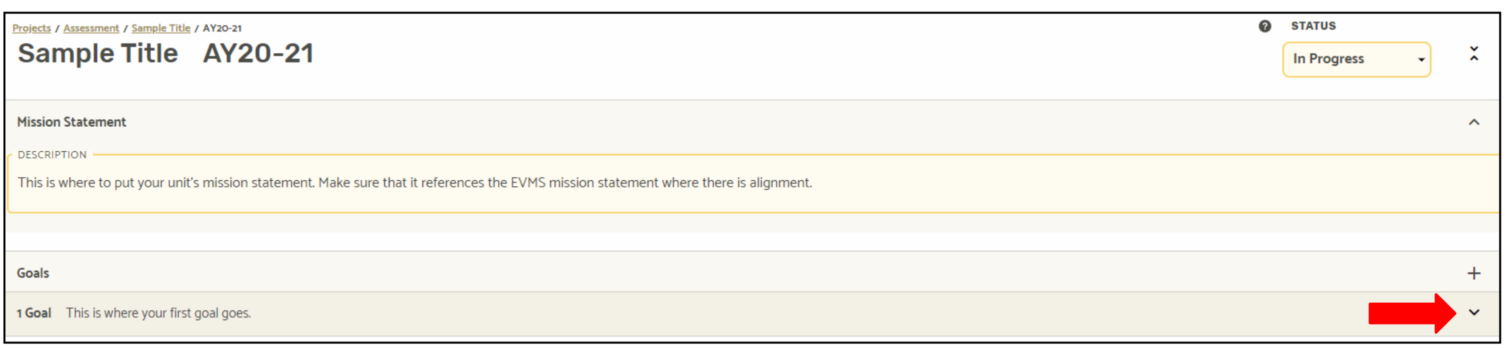
Step 1: To enter a goal in Weave, click on the plus sign to the right of the "*Goals*" line. This will open the first goal section underneath it.

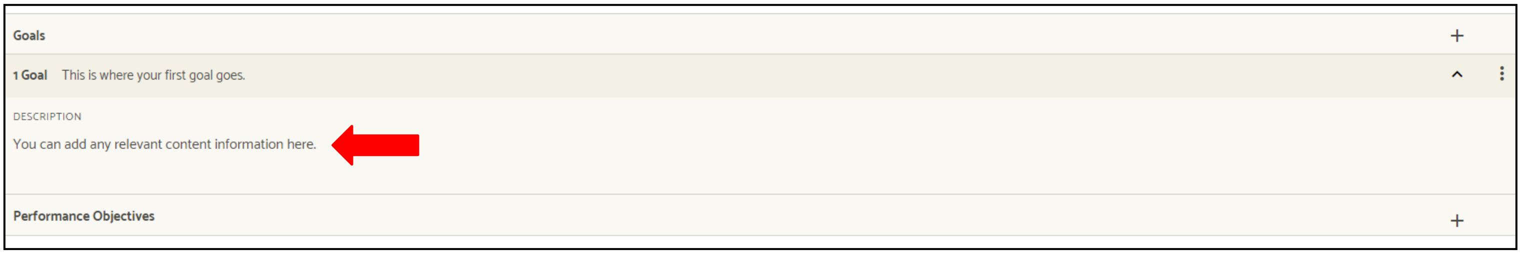


Step 2: To add a goal, click on "*Enter Text*" next to "*1 Goal*" to open a text box where you can input a brief description of your goal.



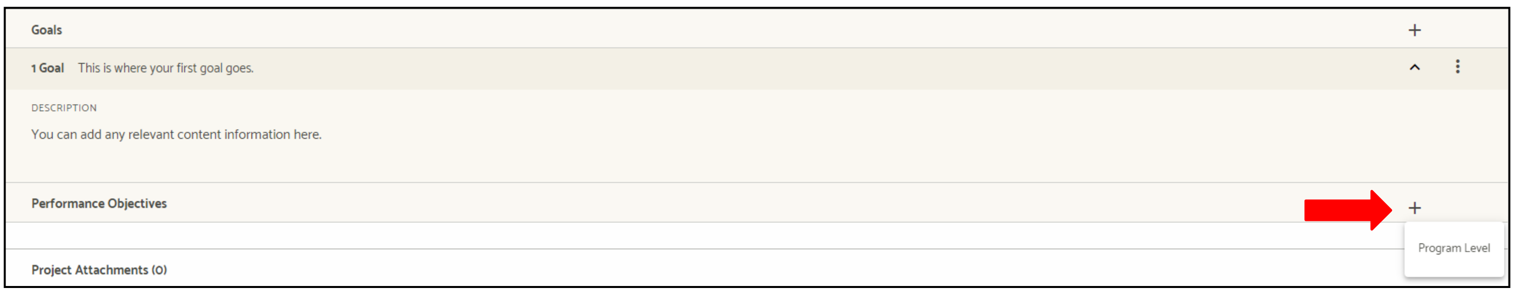
Step 3: Once you enter your goal description, you can provide more information/context about that goal by clicking the arrow to the right of "*1 Goal*". This will open a description section below where you can add information about the goal.





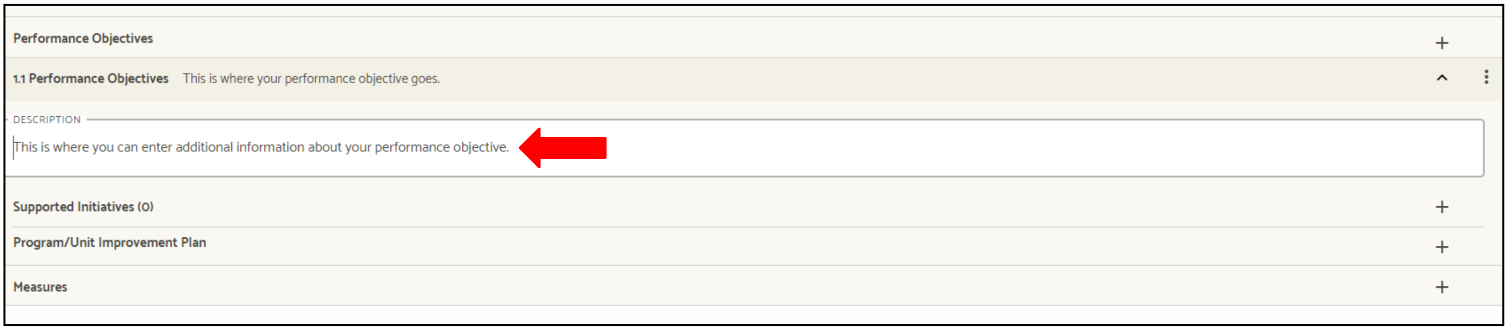
Entering Your Performance Objectives

Step 1: Once you have entered a goal into Weave, you will need to enter performance objectives related to that goal. You can enter a new performance objective by clicking on the plus sign to the right of the "*Performance Objectives*" section header. Select "*Program Level*" (the only option available) when prompted to open the "*Performance Objectives*" section.

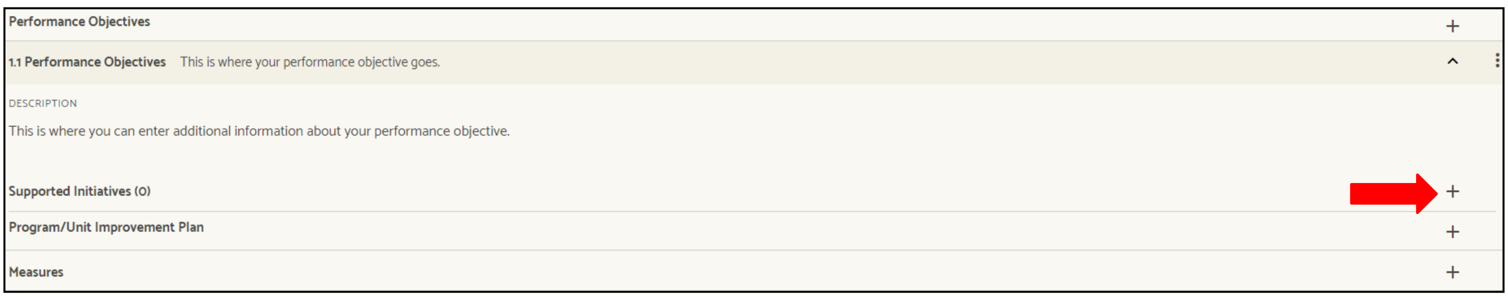


Step 2: As with entering goals as explained above, clicking on this will create a new set of information sections associated with the goal, including "*Performance Objectives*", "*Supported Initiatives*", "*Program/Unit Improvement Plan*", and "*Measures*". Clicking on "*Enter Text*" next to the "*Performance Objectives*" header will open a text box where you can input a brief description of your performance objective.

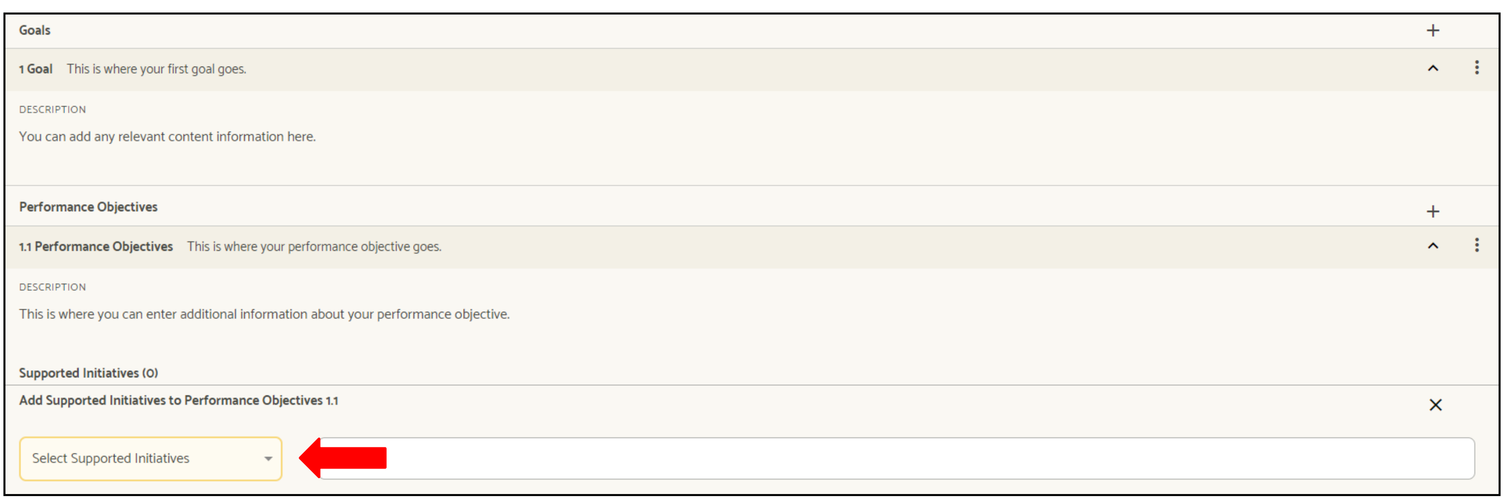
Step 3: Once you enter your performance objective, you can provide more information/context about that performance objective by clicking "*Enter Text*" below the performance objective "*Description*" field. This will open a text box below the performance objective description itself.



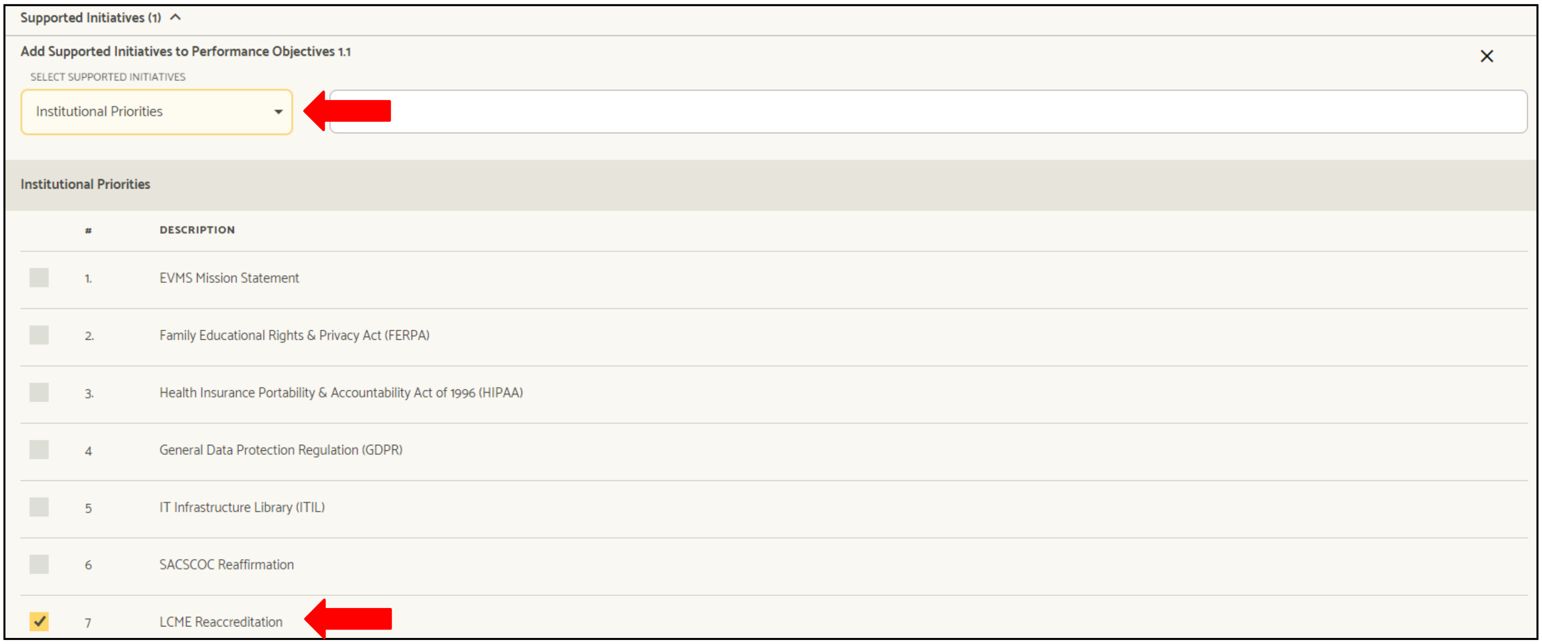
Step 4: Once you have entered the description and relevant information for your performance objective, you will then identify the "*Supported Initiatives*" that particular performance objective relates to. You can add supported initiatives by clicking on the plus sign to the right of the "*Supported Initiatives*" section header.



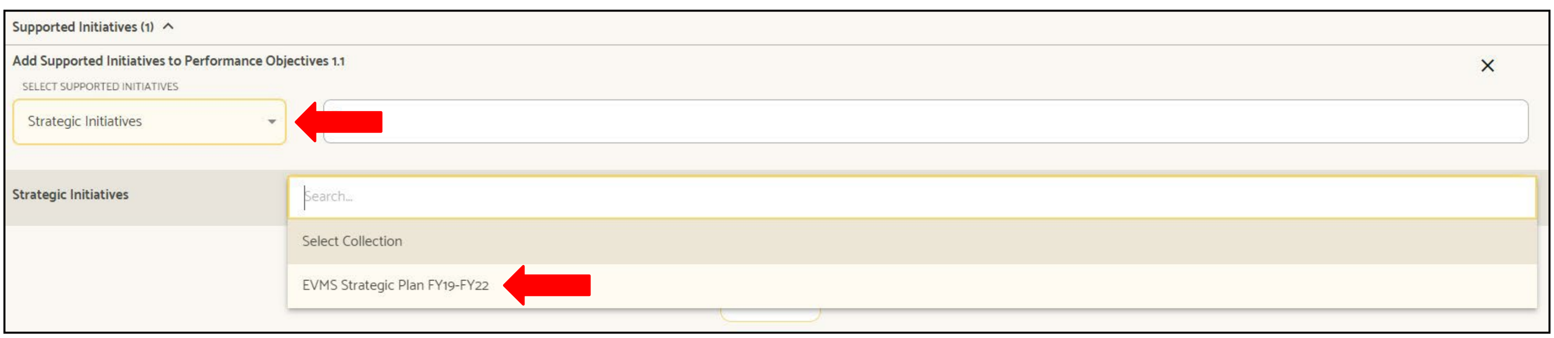
Step 5: Clicking this box will open a new, separate dialog box from which you can select relevant institutional priorities and strategic initiatives from pre-populated lists that your performance objective supports. Examples of these include SACS and LCME accreditation standards (please contact the Strategic Planning and Institutional Effectiveness office for additional details on these), the EVMS strategic plans, and the EVMS mission statement, among others. You can access each of the lists by clicking on the drop down underneath "*Add Supported Initiatives to Performance Objectives*". Please note that at this time, there is no content under "*General Education*".

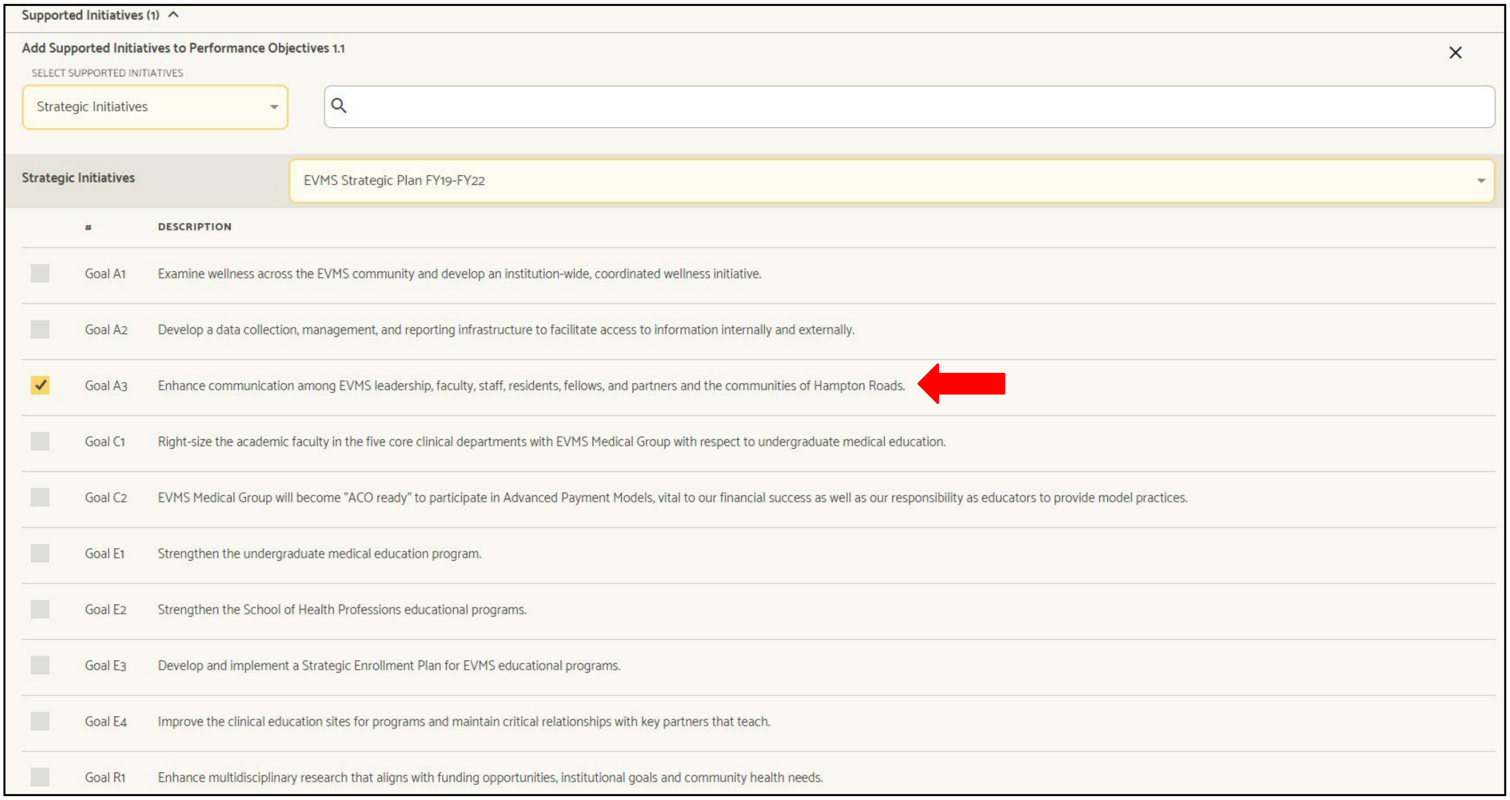


Step 6: Selecting "*Institutional Priorities*" will provide a selection of options that you can check using the box to the left of each for inclusion in the supported initiatives. Click on the "*Close*" button at the bottom of the list to save your selection.



Selecting "*Strategic Initiatives*" will open a drop down list where you can select the EVMS Strategic Plan FY19-FY22. This will take you to a more detailed list of the plan goals for more specific selections by checking the box(es) to the left for relevant goals.

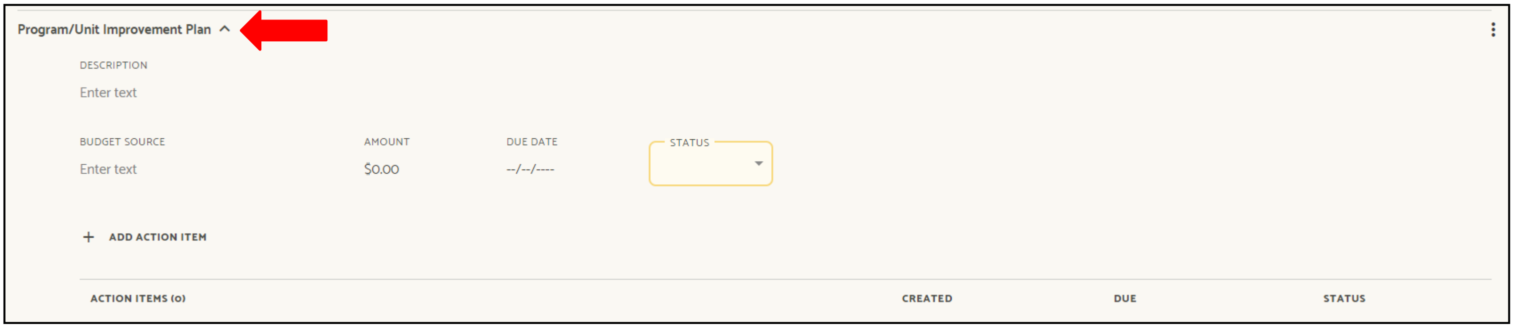




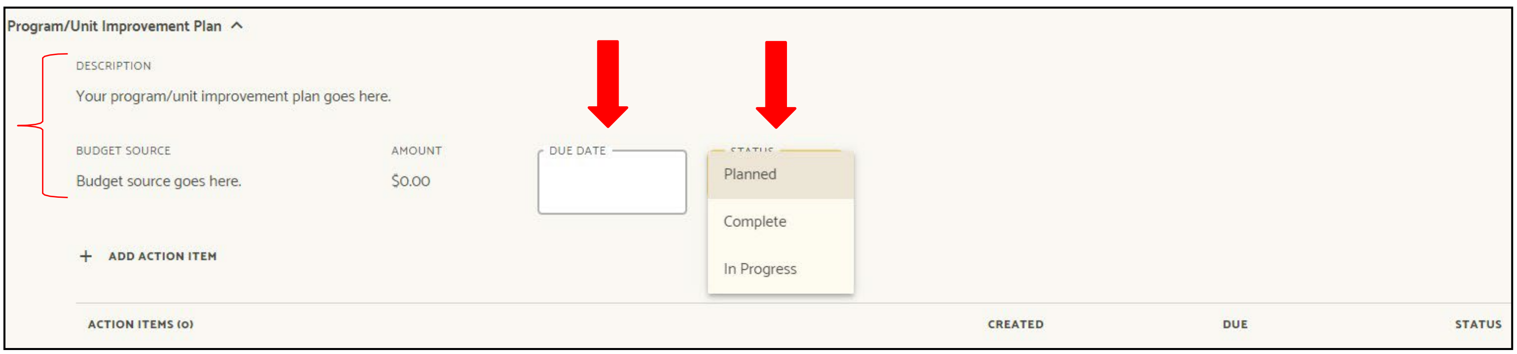
Step 7: Once you have selected all of the supported initiatives related to your performance objective, you will see that there is a number to the right of the "*Supported Initiatives*" section header indicated how many initiatives you have identified for this Performance Objective. Below that you will find a list of the specific initiatives identified. You can click on the up carat to the right of "*Supported Initiatives*" to close that section for easier navigation of the following sections.

<u>Entering Your Program/Improvement Plan</u>

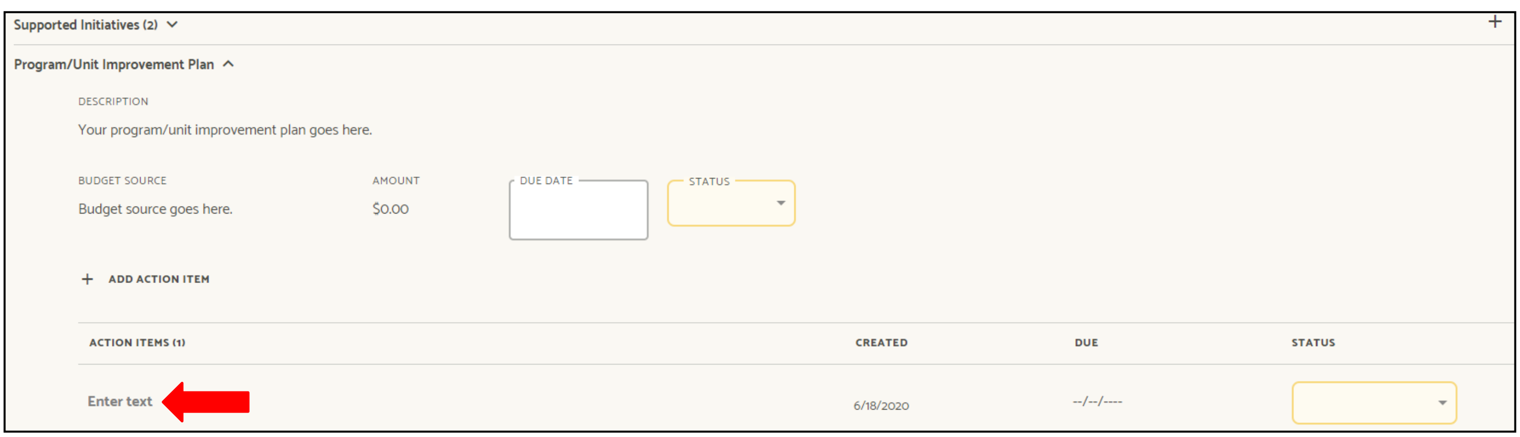
Step 1: Once you have entered your goal, performance objective, and supported initiatives, it is time to add any Program/Unit Improvement Plan(s) you may have to implement to enhance your performance objective. Like the other sections described above, you can access this section and add information on related plans by clicking on the down carat that says "*Add Program/Unit Improvement Plan*" to the right of the Program/Unit Improvement Plan section header. This will open up a set of sections and fields used to track plans, budget sources, and action items as appropriate.



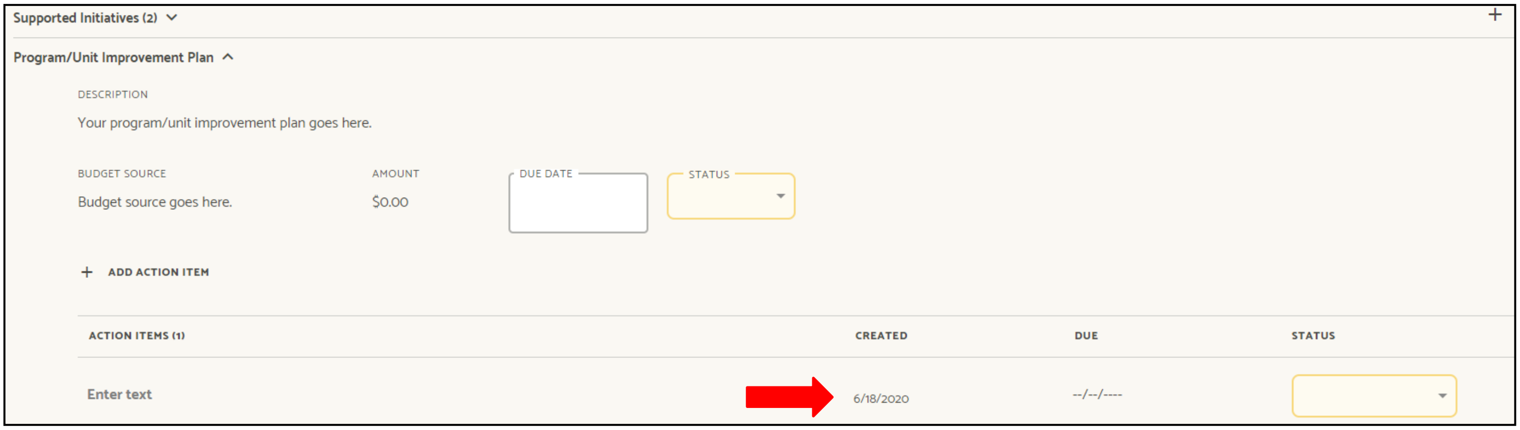
Step 2: You can add improvement plan specifics in this section, including adding a description and budget source by clicking on "*Enter text*" under those fields found on the right side of the frame. You can also enter a budget "*Amount*", plan "*Due Date*", and a "*Status*" for the plan by clicking below those fields, which will open a text box or drop down list depending on the field. Please note that not all plans are expected to have accompanying budgets, and the related fields can be left blank if this is the case.



Step 3: Under the section titled "*Action Items*", you can list specific action items/steps associated with implementation and progress of your program/unit improvement plan. To add an action item, click on the box that says "*Enter text*" underneath the "*Action Items*" header at the bottom left of this section.

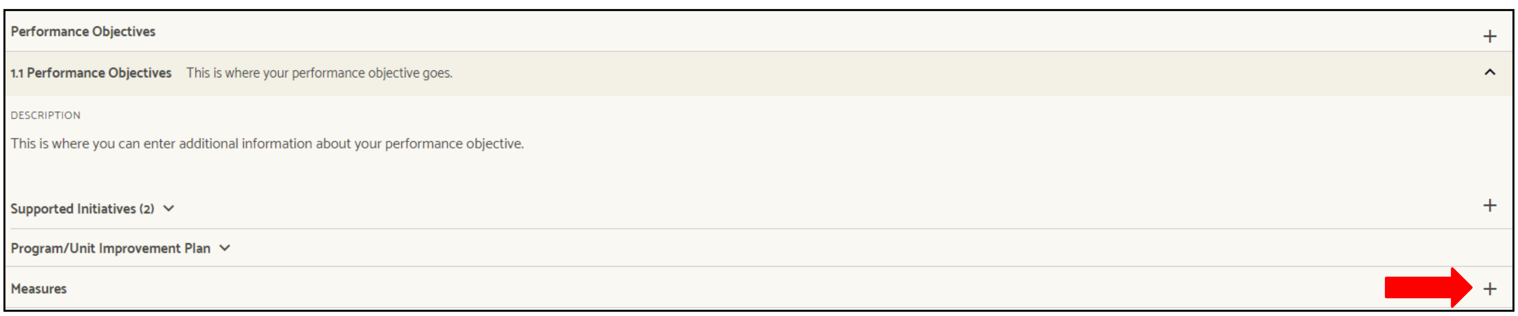


Step 4: Information that applies to the action item, including a "*Created*" date, "*Due*" date, and "*Status*" for that item can be added using the fields to the right of each action item. Please note that the "*Status*" of individual action items is different than the "*Status*" field under the Program/Unit Improvement Plan section header discussed earlier.

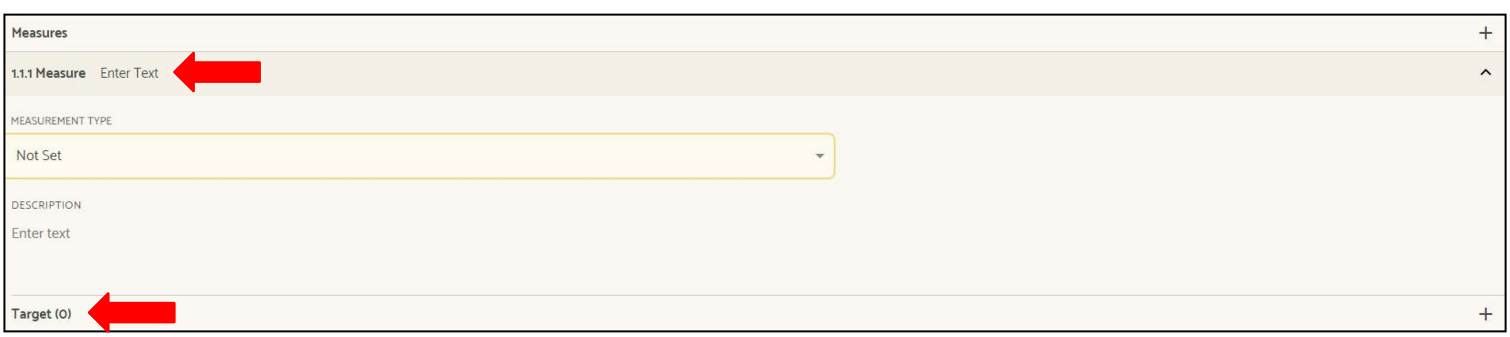


Entering Measures for Your Performance Objectives

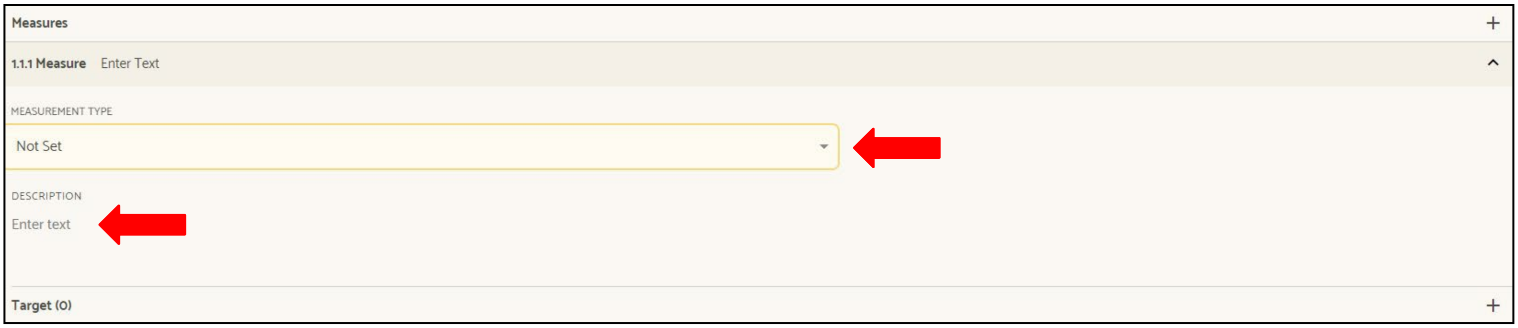
Step 1: Upon completion of your goal, performance objective, supported initiatives, and action plan, you will need to enter the measures by which you will assess the progress of your performance objectives over the course of the assessment reporting year. At the bottom of the "*Performance Objectives*" section, you can create a measure by clicking on the plus sign to the right of the "*Measure*" section header.



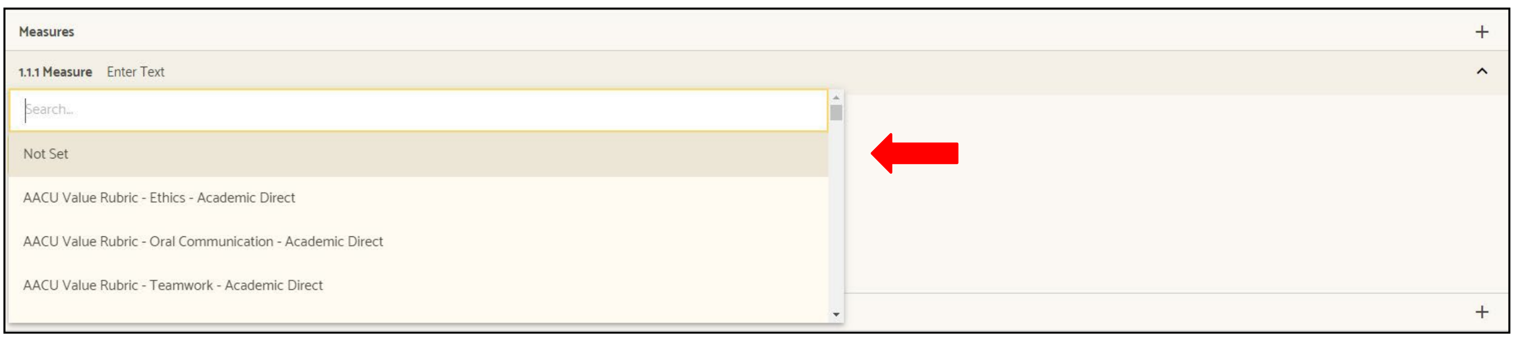
Step 2: There are two content subsections for measures- (1) information about the measure itself and (2) information about how you performed against the expectations of the measure and what you changed/improved as a result (target section, which will be discussed shortly). To enter a new measure, click where it says "*Enter Text*" next to the measure number (in this case, 1.1.1) to open a text box where you can give a brief description of the measure you believe is appropriate to evaluate progress.



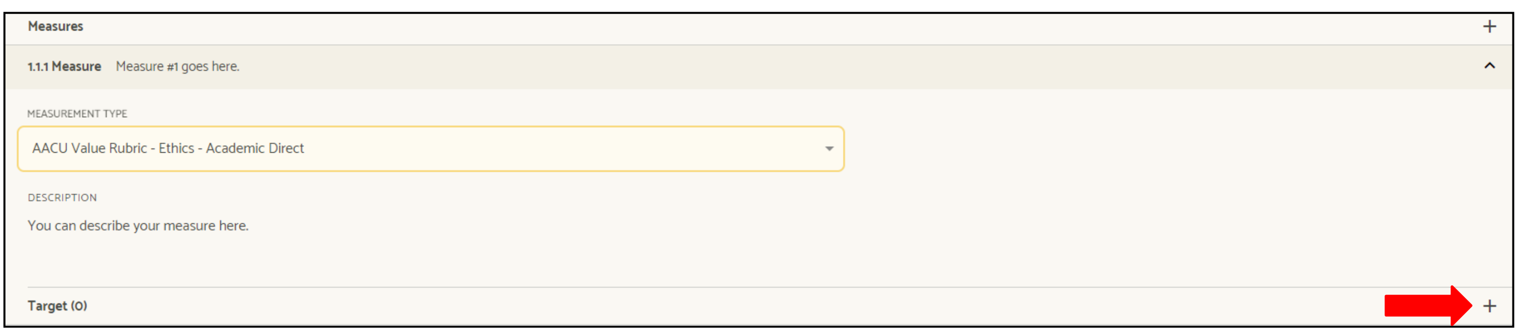
Step 3: Once you have established your measure, indicate the Measurement Type by clicking on drop down under "*Measurement Type*", and select the most appropriate type for that specific measure. You can also add any additional information about your measure under "*Description*" by clicking on "*Enter text*" under the "*Description*" header.



"*Measurement Type*" is a pre-populated field containing a number of options. Select the one you feel is most appropriate for your measure. It is a long list, but you will likely find a subset of the options you use most regularly.



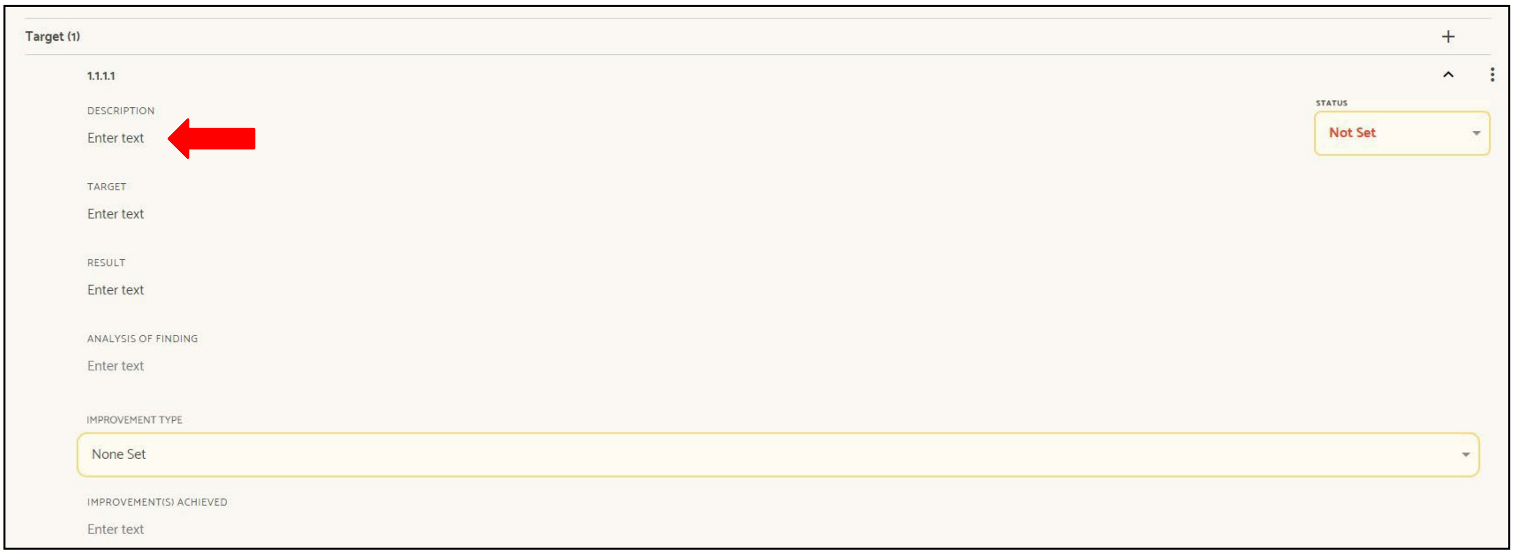
Step 4: Now that your measure, measurement type, and description are entered, you will need to set a target, or a way to assess whether or not your performance objective progressed/was successful at the end of your annual unit assessment cycle. You can enter a target for your measure by clicking on the plus sign to the right of the "*Target*" section header.

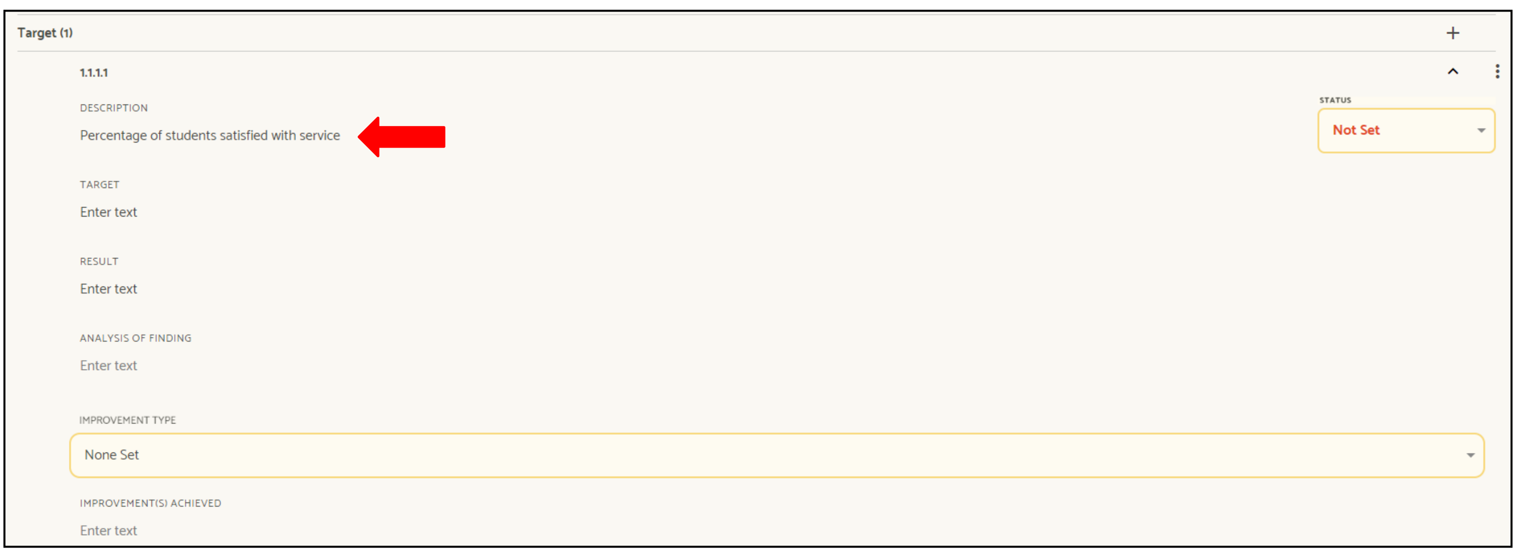


Entering Measure Targets, Results, Findings, and Improvements

Please note that there are two stages to entering data in the "*Target*" subsection. At the beginning of your annual unit assessment cycle when you are creating your annual plan, you will complete the "*Target Description*" and "*Target*" fields. All other Target section fields after that ("*Result*", "*Analysis of Finding*", "*Improvement Type*", and "*Improvements Achieved*") will not be completed until the end of the annual unit assessment cycle when you return to your plan to evaluate progress. At the completion of your annual unit assessment report, all fields in the section should be complete.

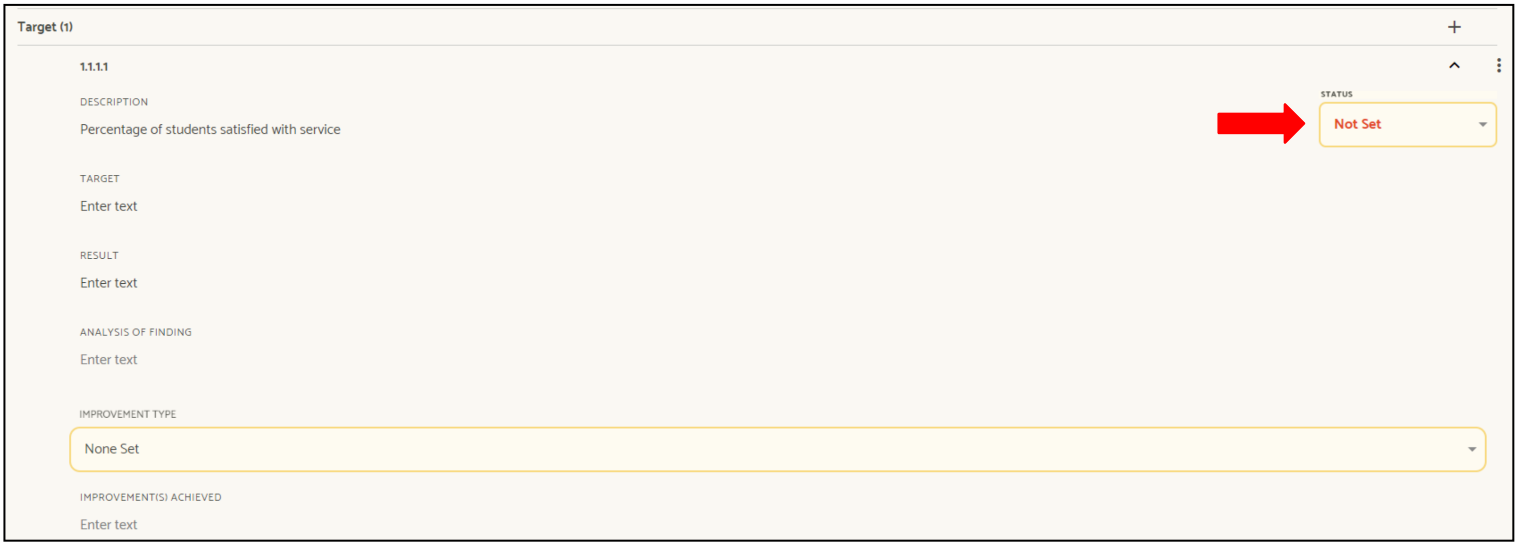
Step 1: To enter your target description, or the metric against which you will assess your progress on this performance objective, click on "*Enter text*" under the "*Description*" section to open a text box. Here you can enter a general description of your target (ex. percentage of students satisfied with service").



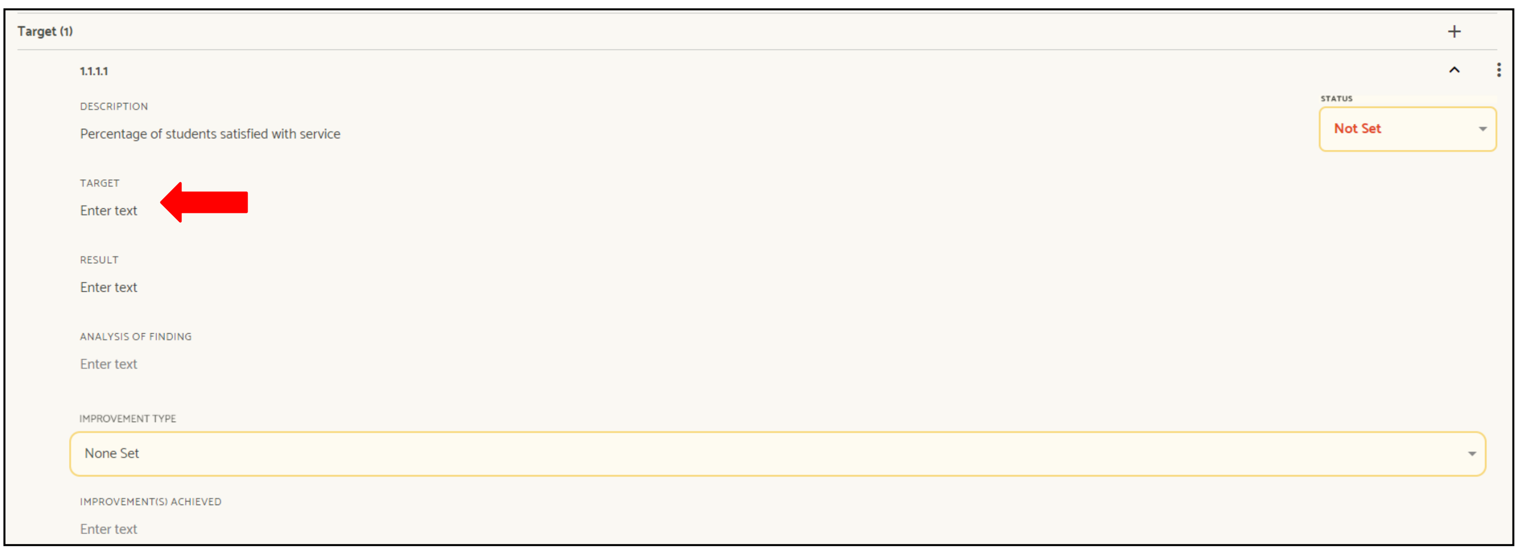


Step 2: At the time you enter your target at the beginning of your annual unit assessment cycle (the planning phase), you will not change the target status indicator button directly below the "*Target*

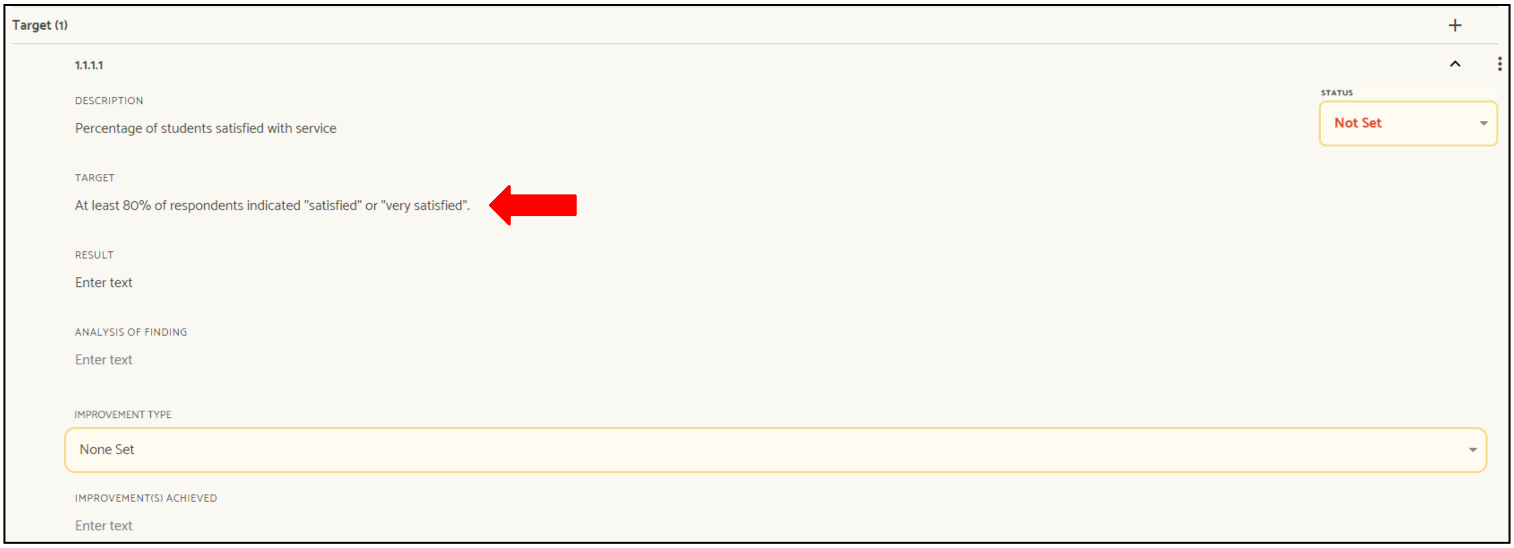
Description". This will remain "*Not Set*" until the end of your assessment cycle when you evaluate your progress, at which point it will be updated to reflect the status of your results from your target.



Step 3: To complete the planning phase of your annual unit assessment plan, you should establish a measure target and enter it under "*Target*" where it says "*Enter text*". If you click on that text, it will open a text box in which you can enter your target information.

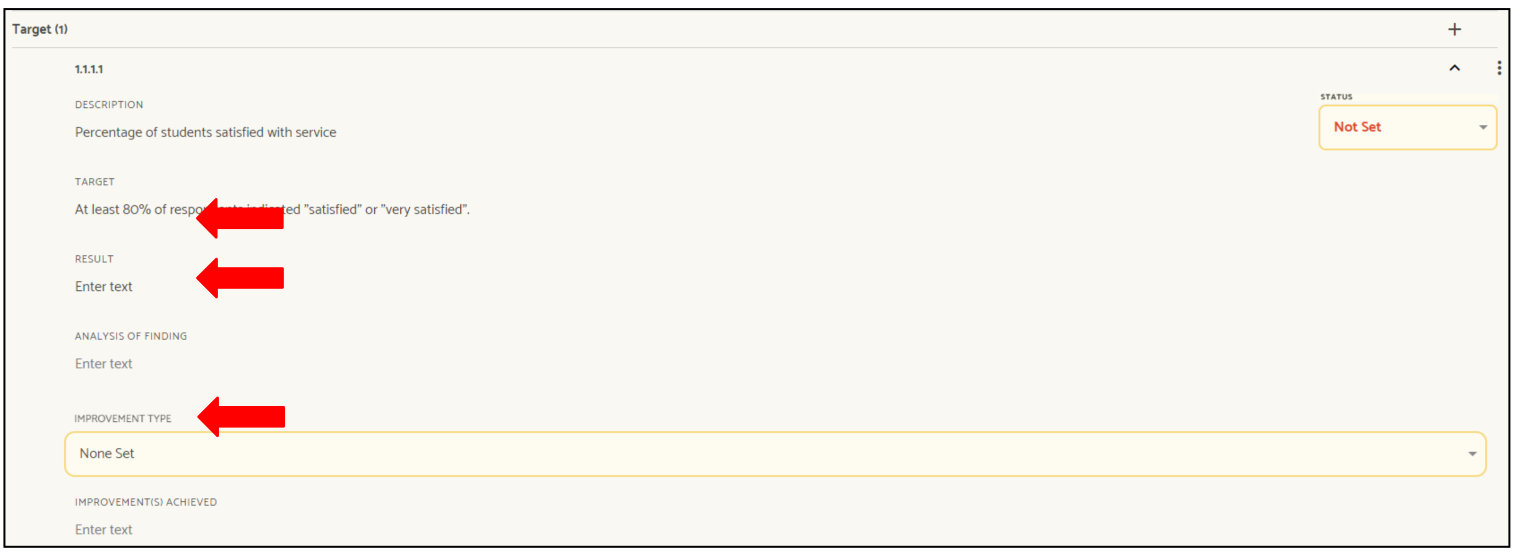


Your target is the actual result you would desire to consider your measure "successful". This is frequently numeric, time-oriented (ex. by end of FY20), or deliverable-driven (ex. report delivered to BOV in advance of 9/10/2019 meeting). Please include both the target itself and a brief rationale for why that target is appropriate.

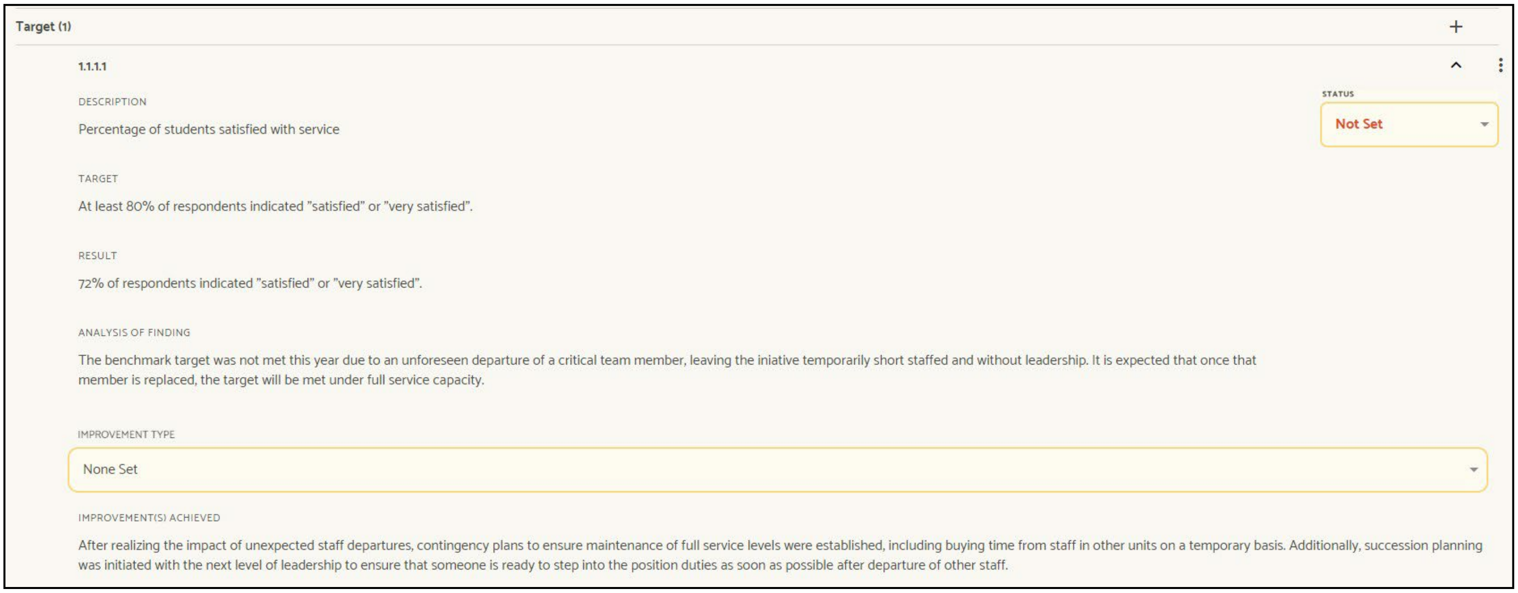


At this point, you have completed all fields related to the annual unit assessment planning phase of your assessment cycle. At the end of the cycle year (fiscal or academic), you will return to your Weave report to complete the remaining fields in the assessment reporting phase, described in the following steps. These fields include, under the "*Target*" section headers- "*Result*", "*Analysis of Finding*", "*Improvement Type*", and "*Improvement(s) Achieved*".

Step 4: You can enter information into the "*Result*", "*Analysis of Finding*", and "*Improvement(s) Achieved*" fields by clicking on the text that says "*Enter text*" underneath each field.



The "*Result*" field includes the final result against which your target is assessed, which in this case would be the percentage of students found to have indicated satisfaction. The "*Analysis of Finding*" field allows for more detailed explanation of why/how the result came to be and factors that impacted it, including additional context as appropriate for explaining outlier or underperforming results. Finally, the "*Improvements Achieved*" should include information on actions that were taken to or plans for addressing the results and findings moving forward.

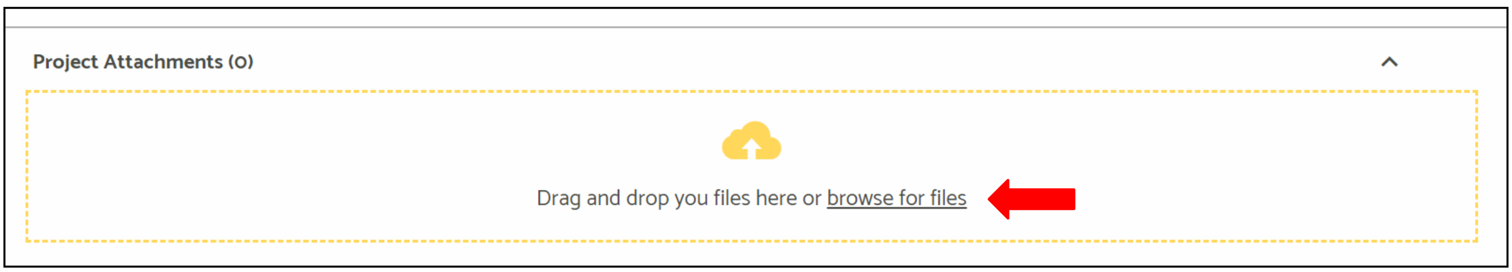


Step 5: To enter an "*Improvement Type*", click on the text that says "*None Set*" to expand a pre-populated drop down list of options. Select the improvement type that is most appropriate for the improvement(s) you made based on the results and findings for your measure/target.

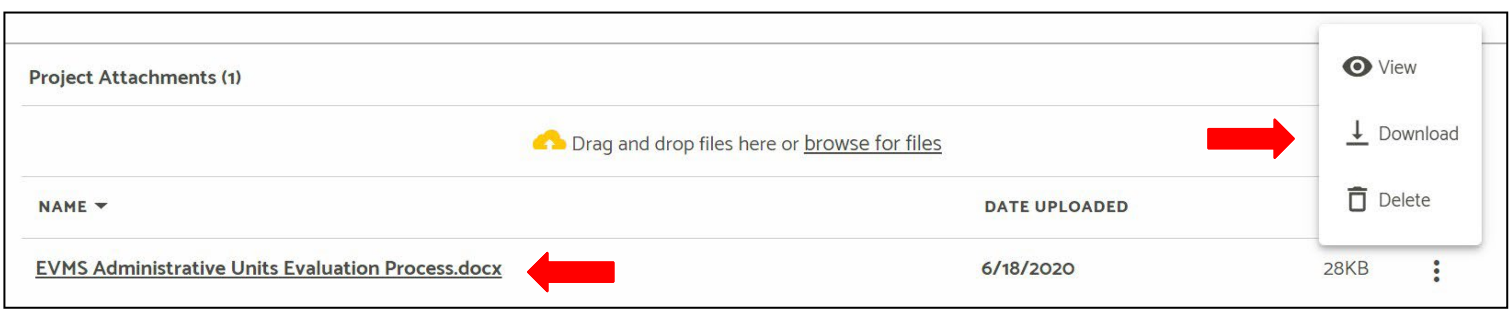
Section IV: Attaching Documentation

At this point, all Weave fields related to your annual unit assessment project (both planning and reporting phases) have been completed. The final task is to attach any documentation supporting your annual assessment report. This should include, among other things, (1) a copy of your unit's annual assessment report process and (2) agendas/meeting minutes from discussions between unit leaders and their executive management about the plan and results. In addition to these specific items, other often included documents are survey and analysis results, rubrics, tools or instruments used in evaluation, reports and presentations, and any other appropriate information related to the activities discussed in your Weave project.

Step 1: To attach documentation to your Weave report, go to the bottom of the page where it says "*Project Attachments*". Clicking on the plus sign to the right opens up multiple options for attaching documentation, including drag and drop capability from File Explorer and browsing your computer for files.



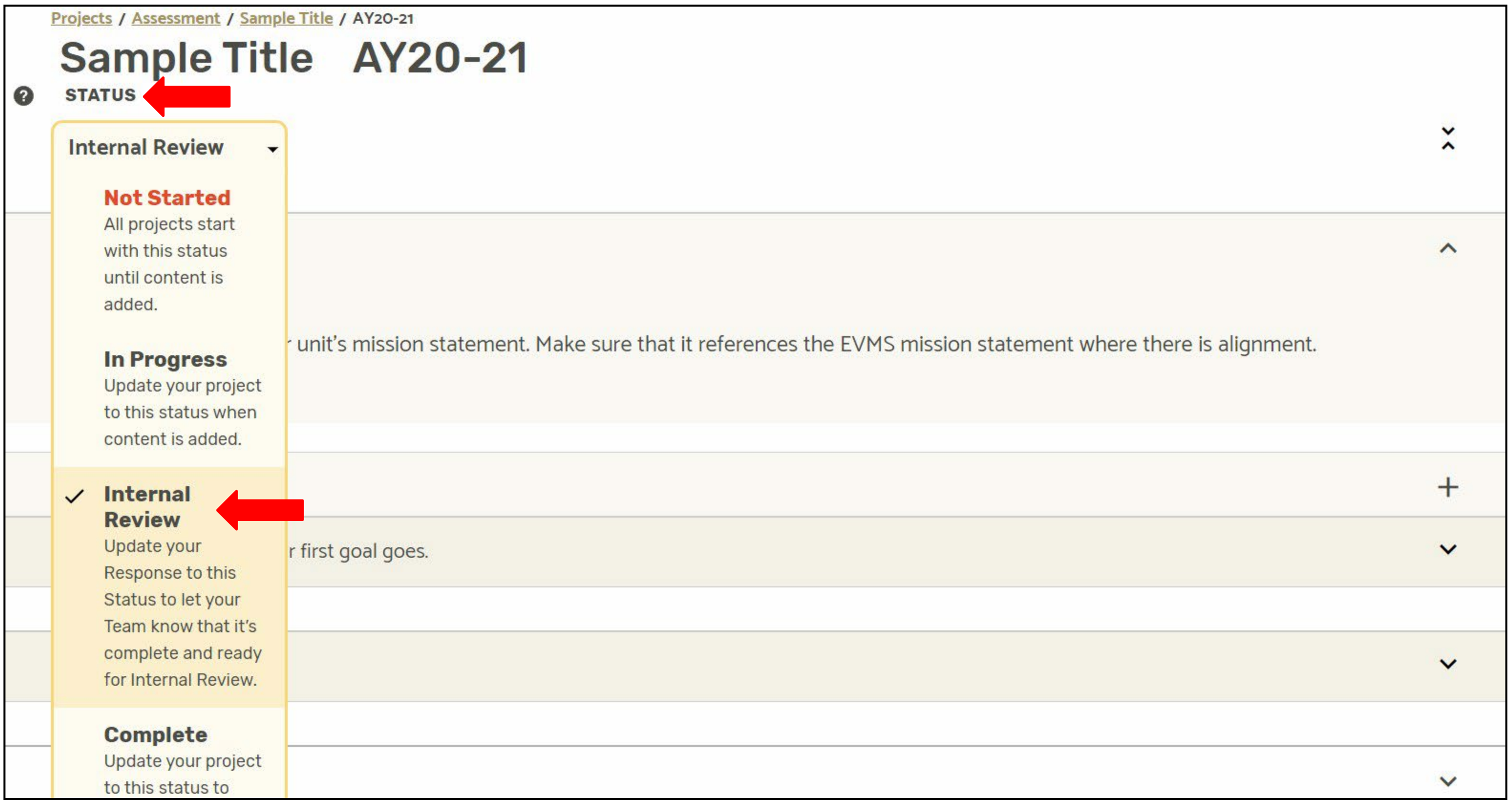
Step 2: Once attached, documents can be opened from Weave itself. Clicking on the three dots to the right of any specific document will open up an option list to "*View*", "*Download*", or "*Delete*". Selecting "*View*" will give a thumbnail view of some, but not all documents. Documents sometimes do not show in the viewing function. However, all documents can be downloaded using the "*Download*" option, and will open in the appropriate application for their file type (ex. Word, Excel, Powerpoint).



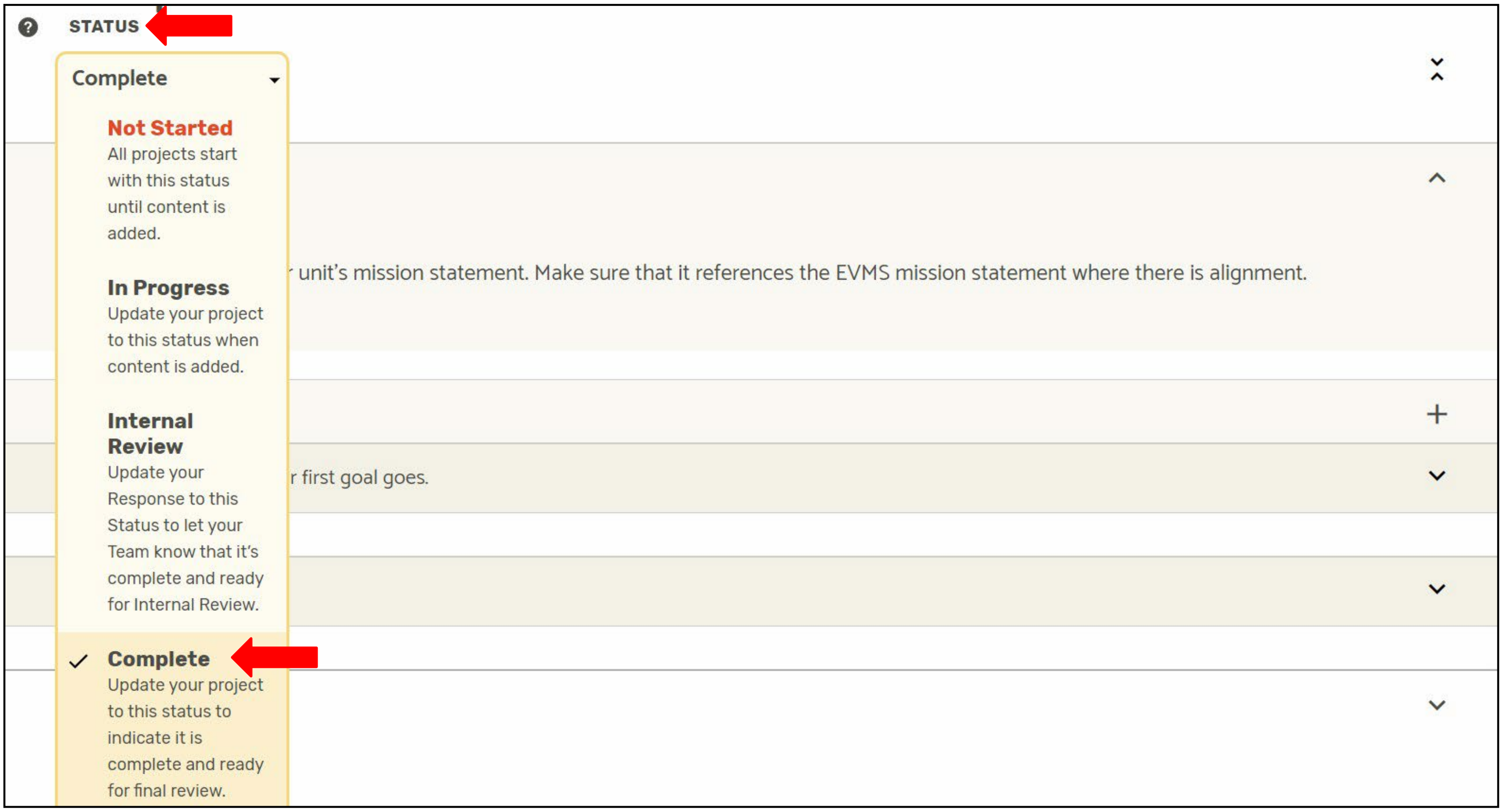
Section V: Final Report Completion Steps

Indicating Report Readiness for Review and Completion

Step 1: As you reach the end of your Weave annual unit assessment report preparation (note: not during the planning stage) for a specific annual unit assessment cycle, you should indicate that your report is ready for review by your executive management by changing the "*Status*" in the top left corner of your project to "*Internal Review*".



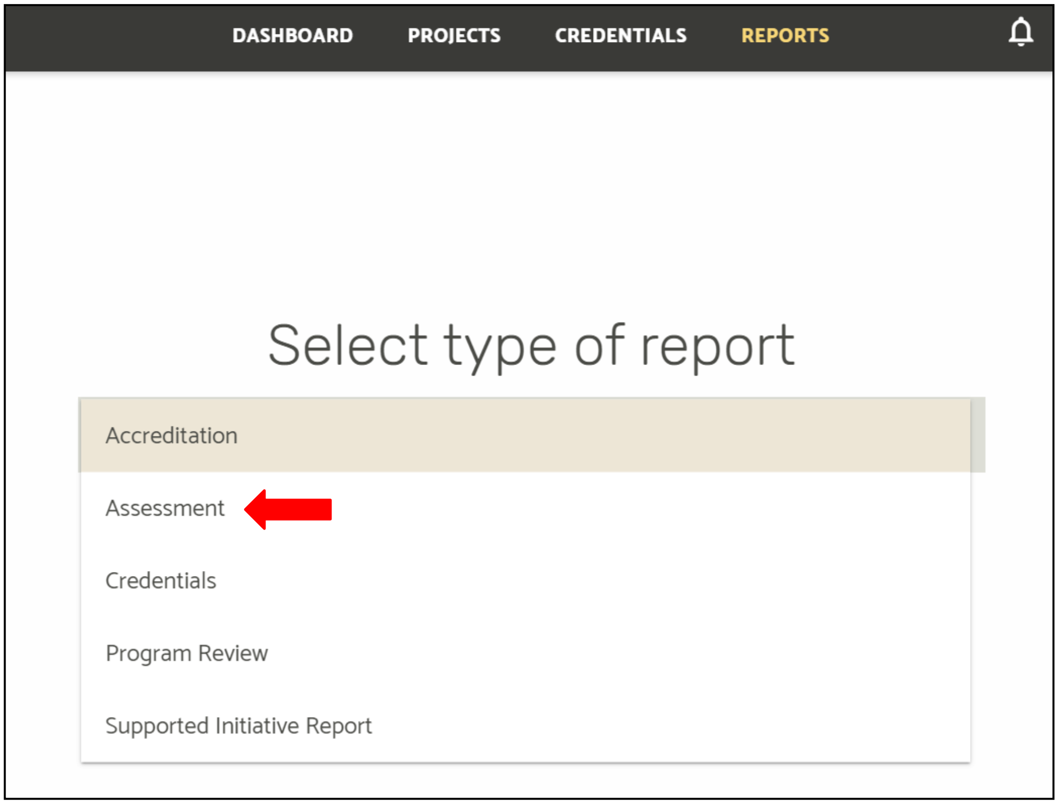
Step 2: Once your management has reviewed your report and you have met to discuss final results and plans for the coming cycle, you can finalize the annual cycle by marking your Weave report status "*Complete*". When the annual cycle is closed for all units, all reports will be frozen for further editing and the year will be considered complete.



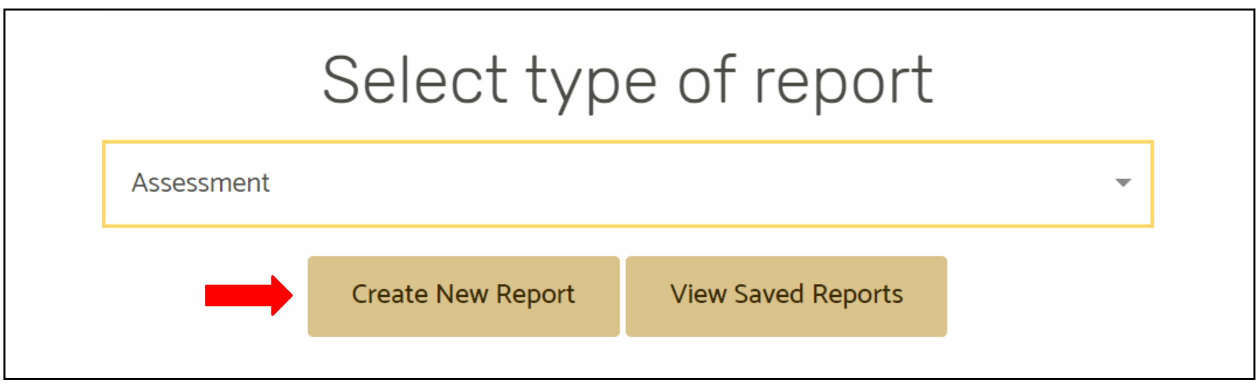
<u>Creating a Final Report Document</u>

Step 1: Creating a .pdf document version of your final project to keep for your records can be done by clicking on the “*Reports*” tab on the navigation bar at the top of your screen.

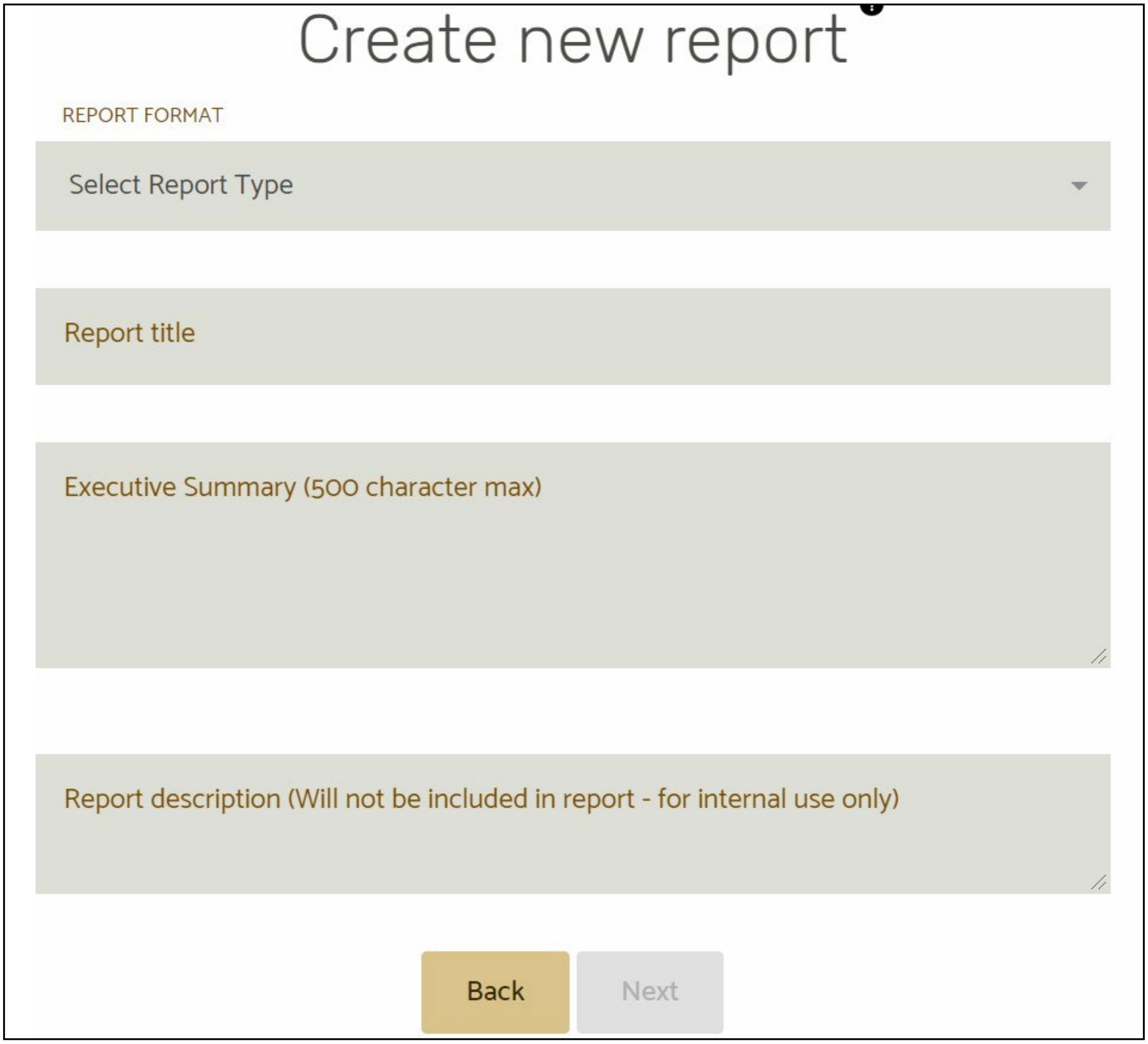
Step 2: Clicking on “*Reports*” will take you through a series of screens that allow you to select your unit, reporting period, format, and content of the .pdf report you would like to create. The first of these screens will ask what type of report you would like to create. Clicking on the drop down box will provide you with a number of options, of which you should select “*Assessment*” for the type of report you want to create.



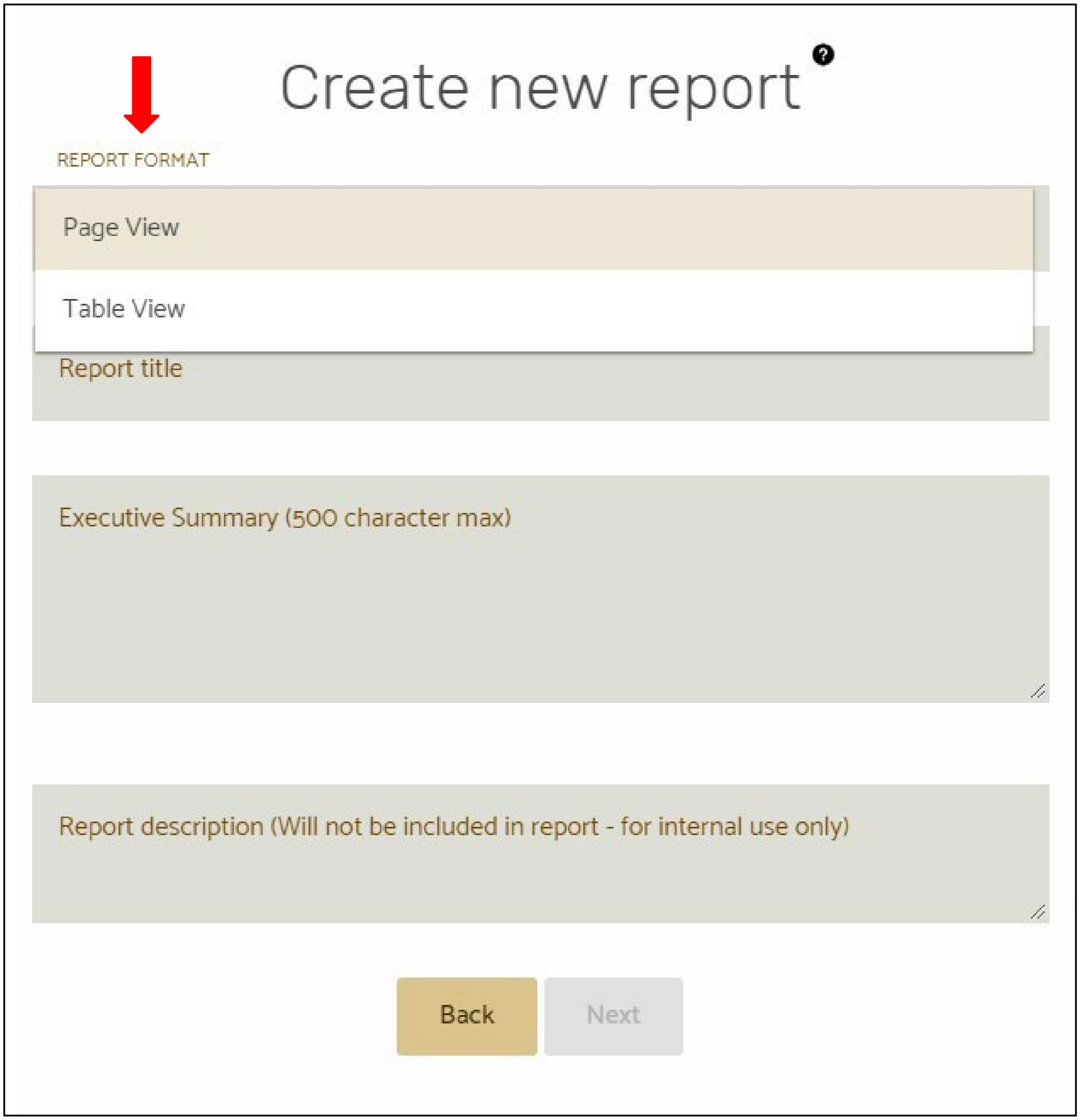
Step 3: Once you select "*Assessment*", you will be asked if you would like to create a new report or view saved reports. To create a new report at the end of your annual unit assessment cycle can be done by selecting "*Create a New Report*", which will take you to the next screen.



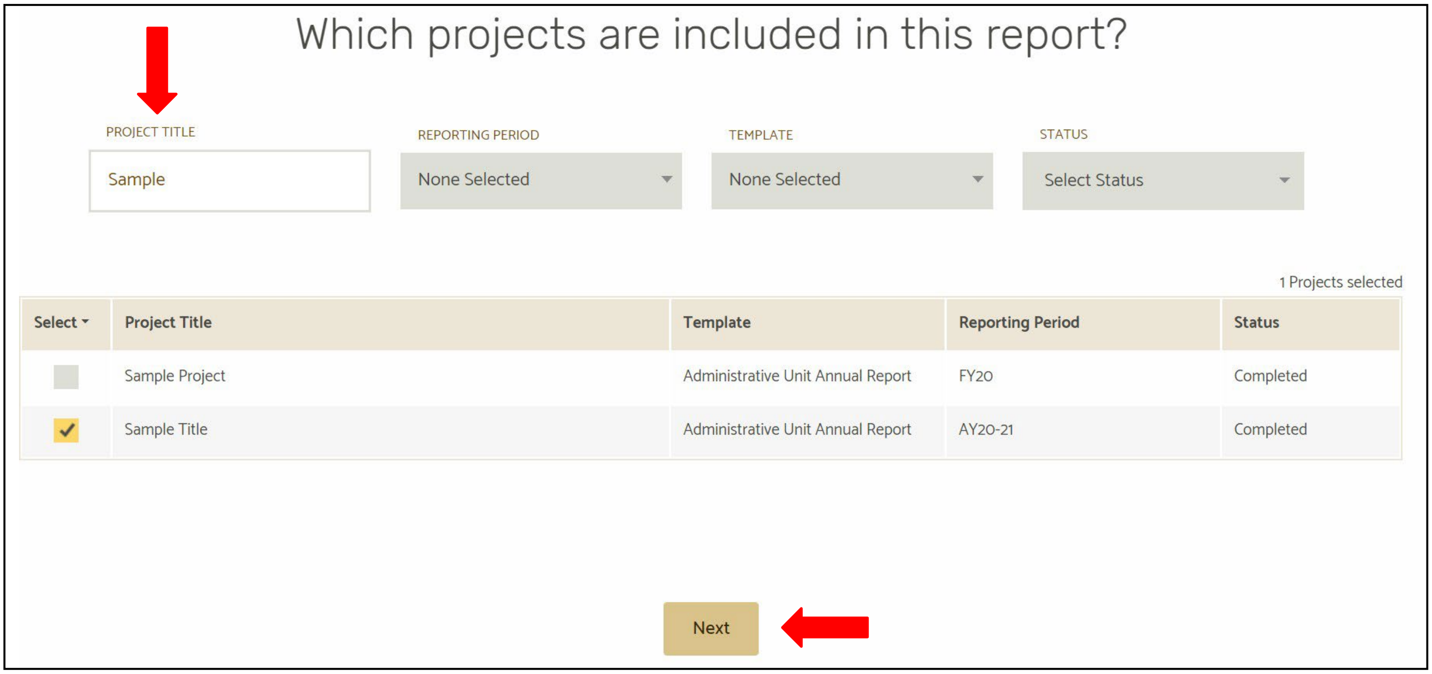
Step 4: The next screen will allow you to select your report format, give your report a title, give an overview of the report content, and provide a report description.



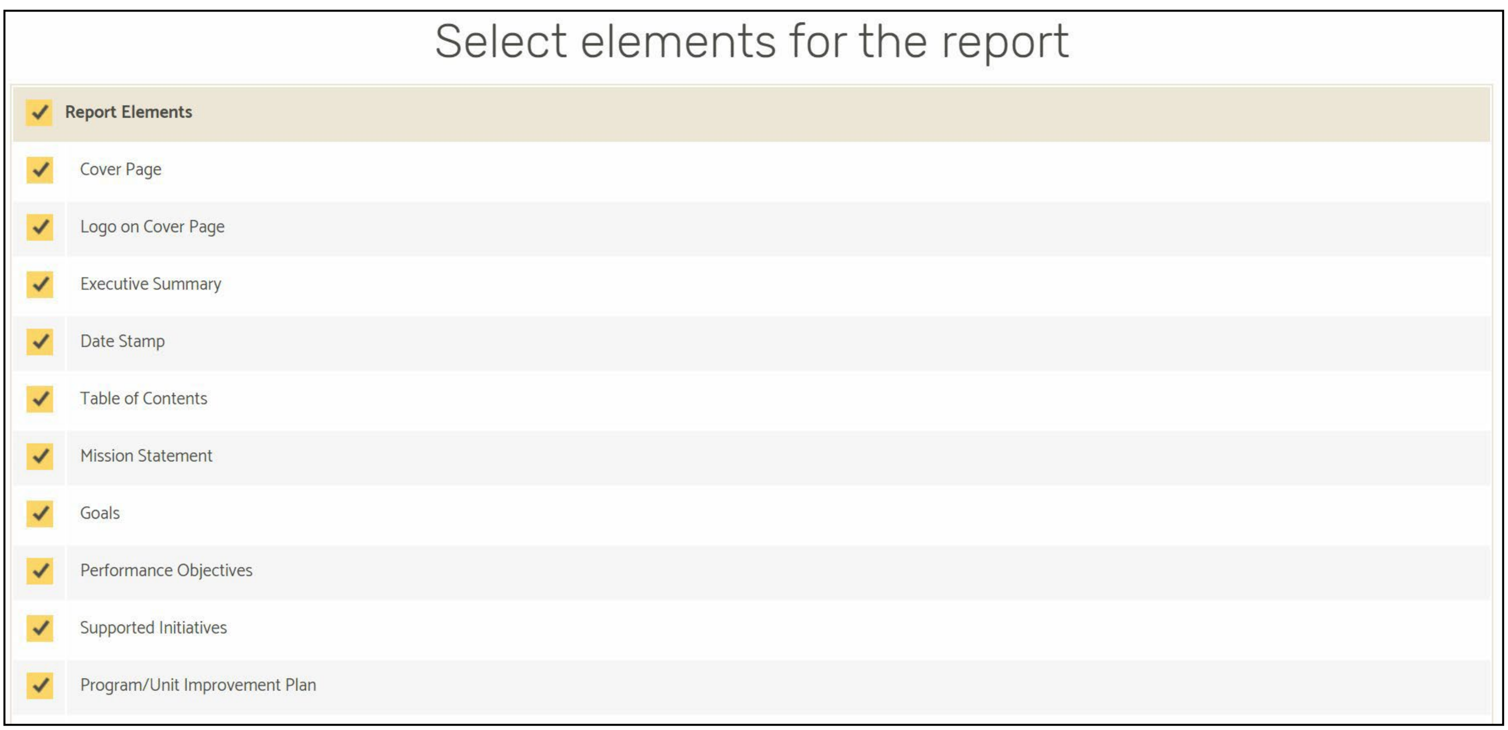
Your report format can be "*Page View*" or "*Table View*". How you would like to present your report is up to you and your executive management based on personal preference. The content will remain the same regardless of the report format selected.



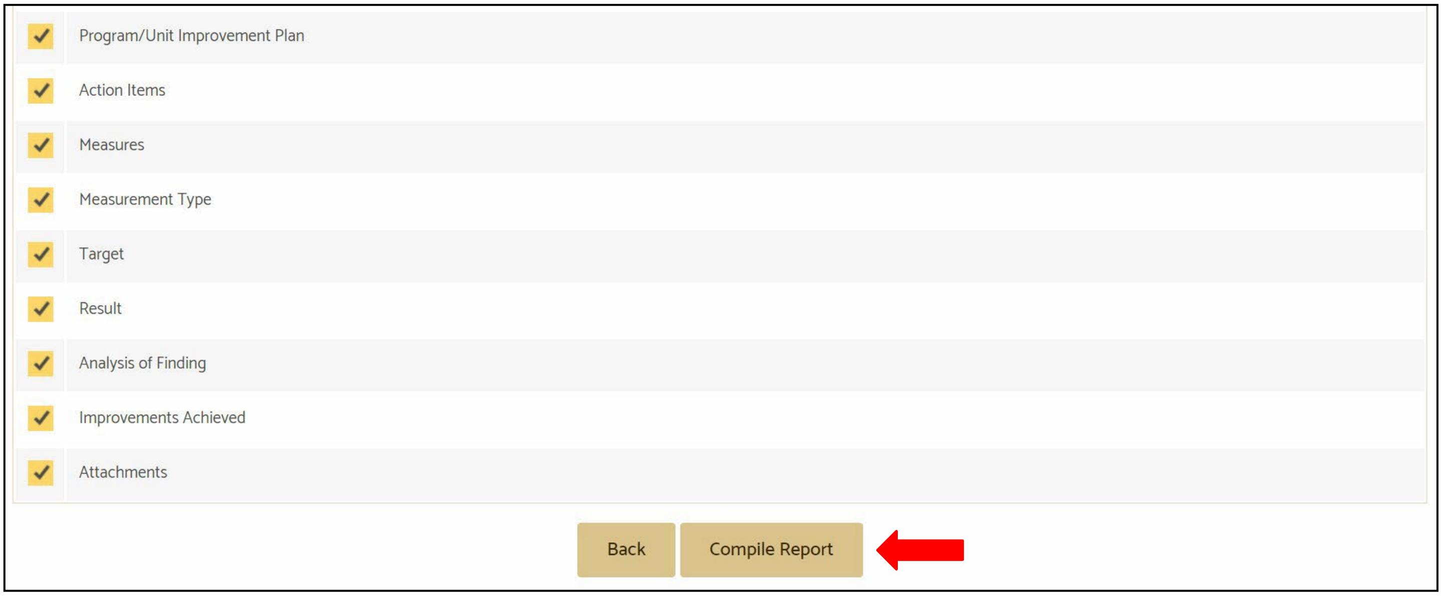
Step 5: Once you select your report format and complete the other fields, click "*Next*" and you will be taken to a screen that allows you to select the project(s) you want to include in your report. The list of projects you see will be based on your access, and you can select one or multiple projects to be included in your report. You can search for a specific project using the filter and drop down fields at the top of the screen, including by project title, reporting period, template type, and completion status. Once you have identified the project you would like to use in your report production, click "*Next*".



Step 6: You will next be asked what "*Elements*" you would like included in your report. The elements encompass all of the fields in all of the sections you completed. Unless you have a specific reason to only look at one particular set of information, you will likely leave all elements selected for the final report creation (all are checked when the screen first comes up).



Once you have selected the report elements you would like to include, click "*Compile Report*" at the bottom of the page.



Step 7: Your report will be created in the report format you selected (page or table). An example of each format is presented is below.

Page Format:

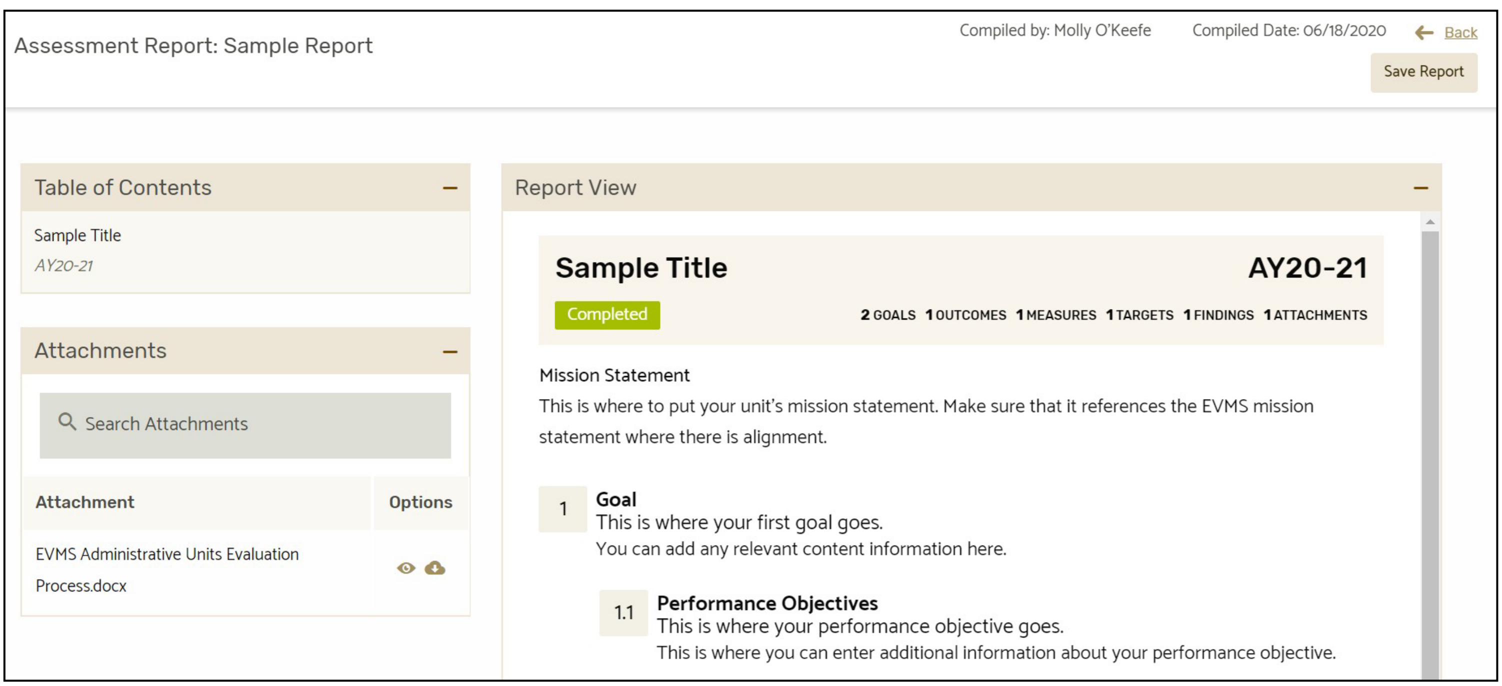
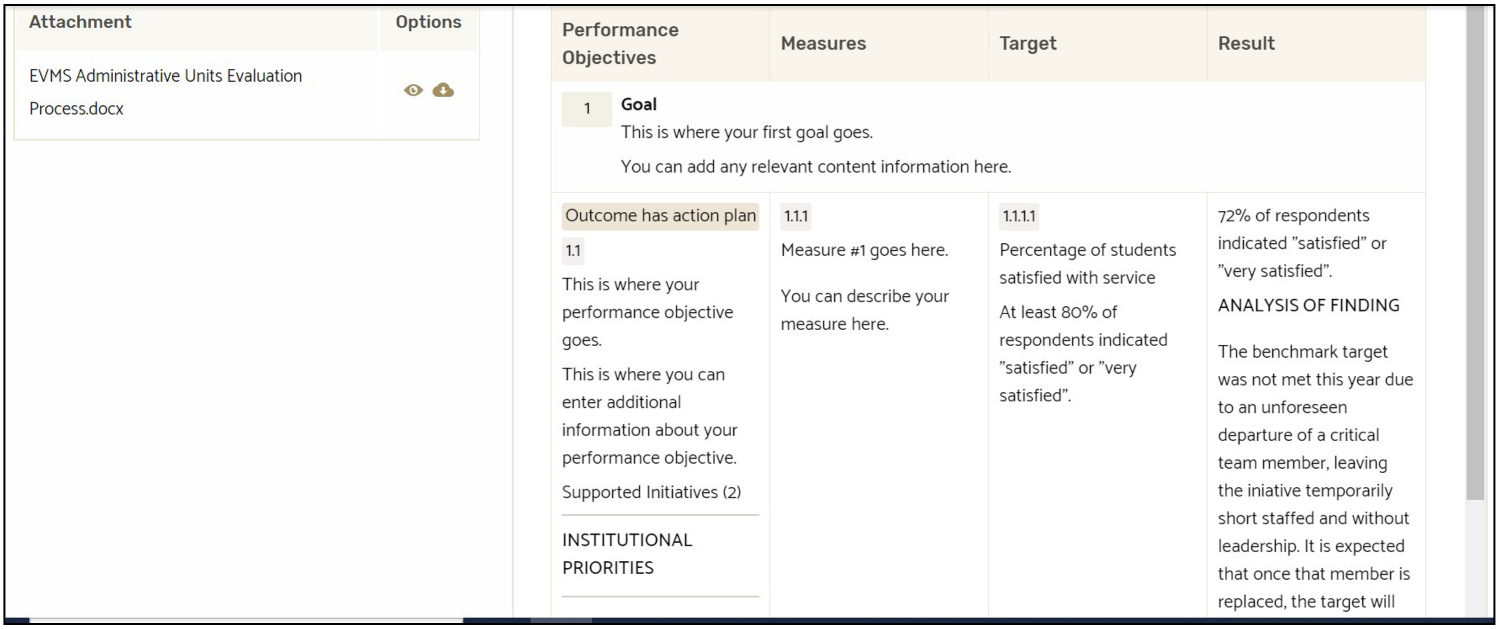
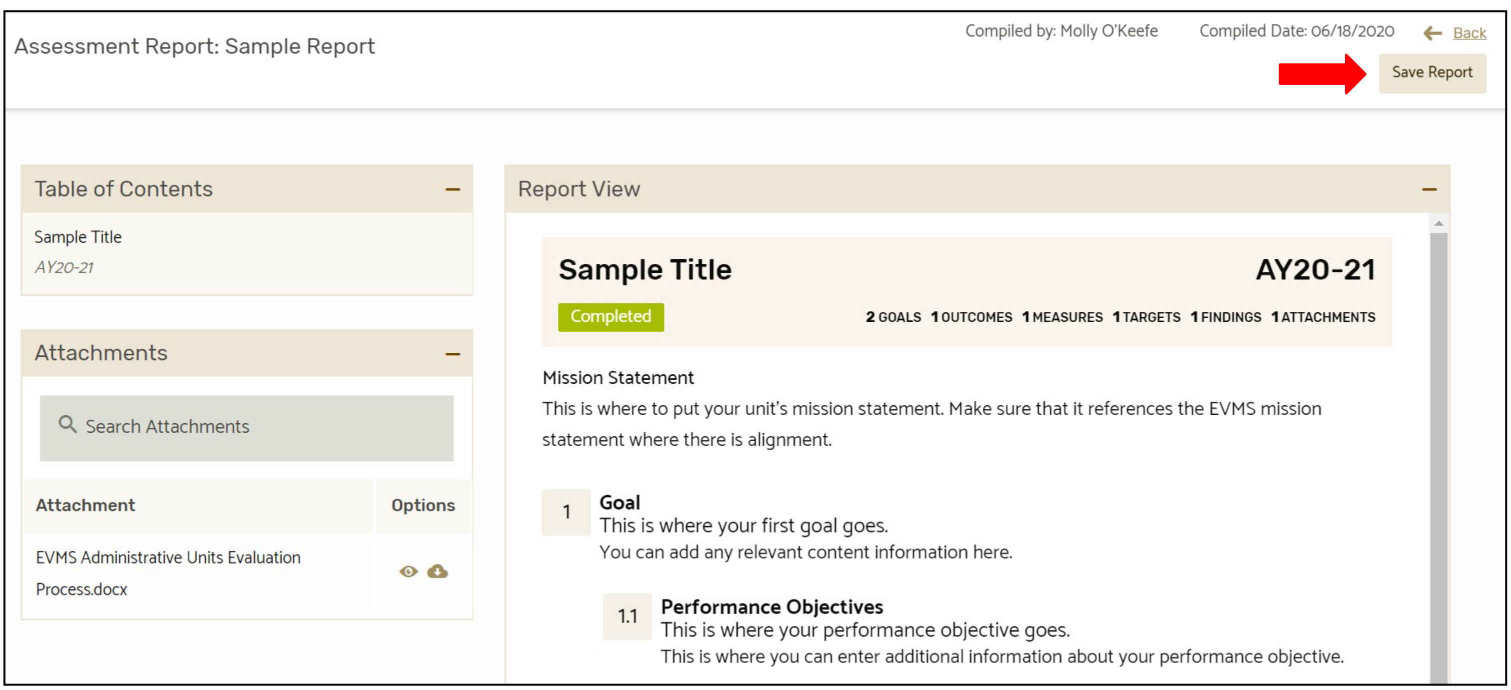


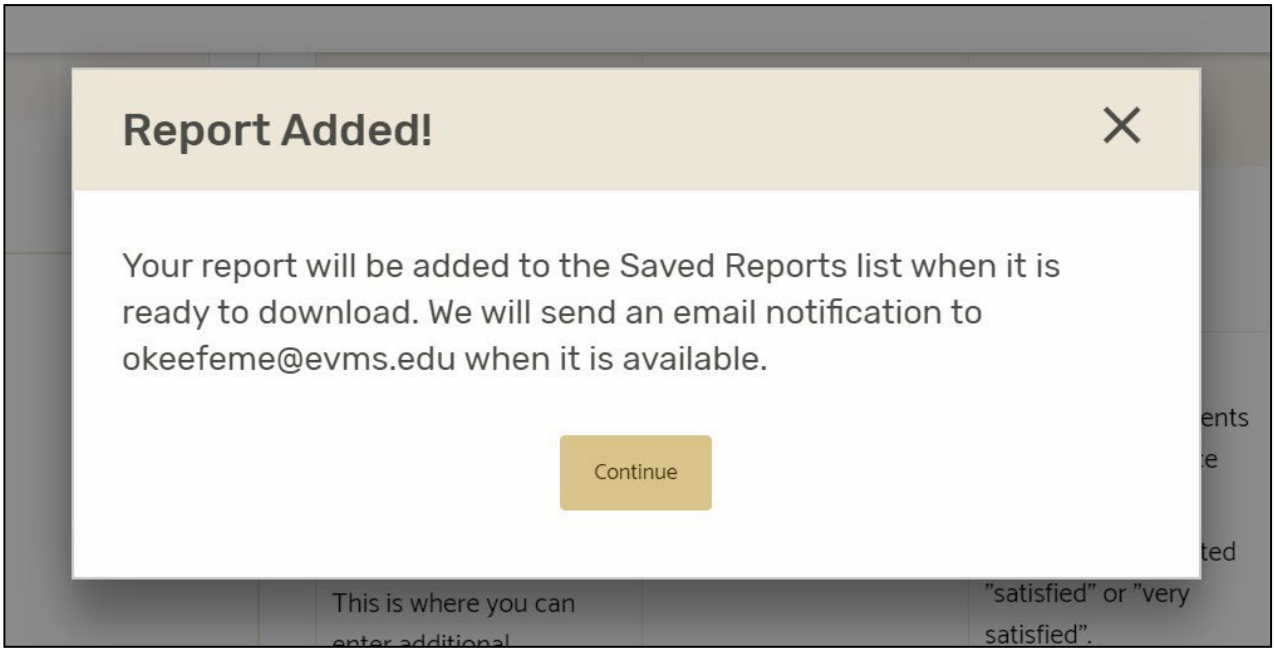
Table Format:



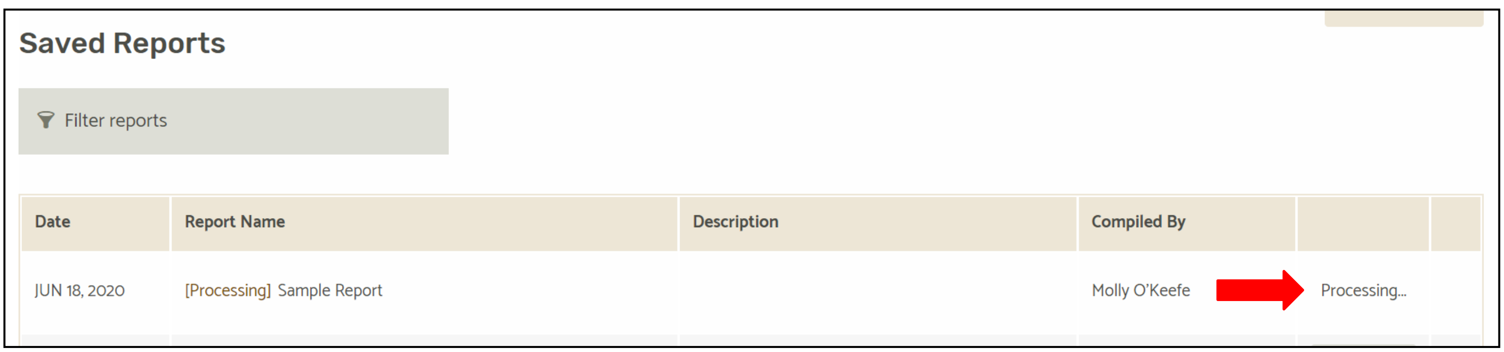
Step 8: Now that your report has been created, you will want to save it into your list of saved reports. You can do this by clicking the "*Save Report*" button in the top right corner of the report screen.



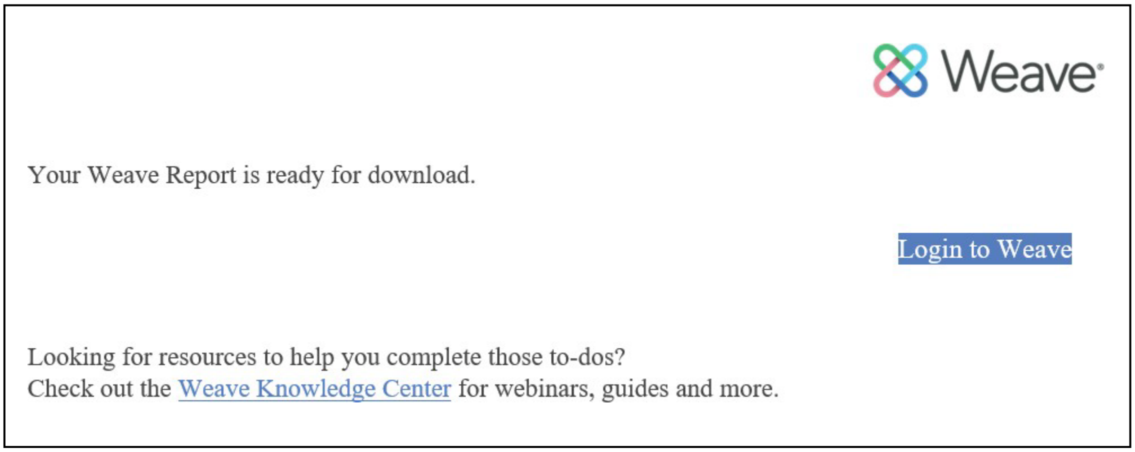
A pop up screen will inform you that your compiled report has been added to your saved reports list and will be available for download shortly. You will receive an email when it is finished and ready for download. Click the "*Continue*" button to be taken to your saved reports list.

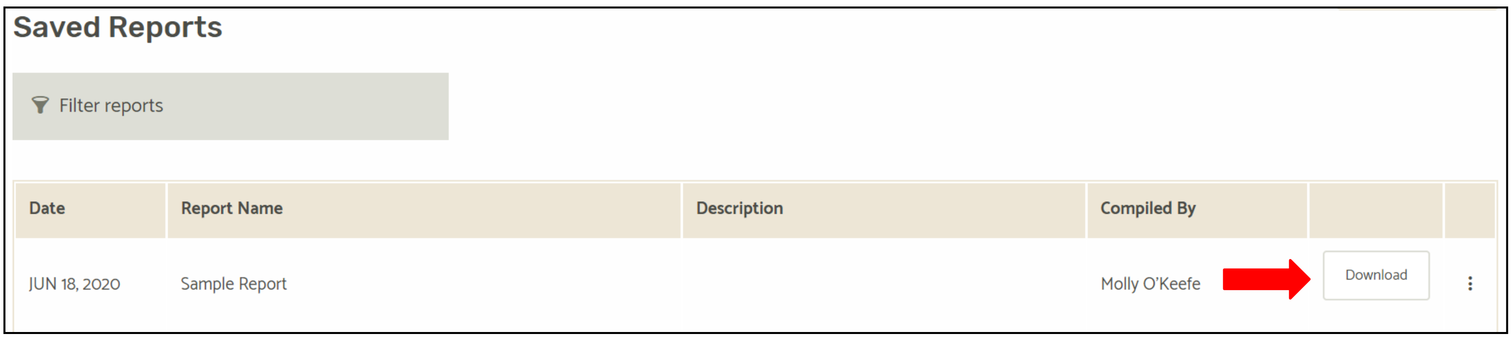


As the report is compiled, it will indicate that it is "*Processing*" until it is available.



Step 9: You will receive an email when the report has finished processing (it may take a few minutes), and the report status in your saved reports list will change from "*Processing*" to a button that allows you to download the .pdf version as an electronic copy.





Step 10: Finally, click on the "*Download*" button, and a zip file containing your finished report will become available at the bottom of your screen. You can open this file, extract the content to where you would like to save it, and save it. At this point, you have completed your annual unit assessment project. Congratulations!