

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.

Improvement,
Simplified.

Our mission is to improve student learning through assessment and we do this by providing software solutions and expertise for institutional and programmatic effectiveness.

USERNAME
your EVMS user name

PASSWORD
***** SHOW

[Forgot Username? or Password?](#)

Log In

[Access Weave using your institution's sign-on](#)

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

The dashboard is titled "Dashboard" and contains several sections:

- Assessment Project Statuses:** A bar chart showing the status of 19 projects. The categories are: Not Started (0), In Progress (19), Internal Review (0), and Complete (1). A red arrow points to the "Assessment Project Statuses" dropdown menu.
- All Projects:** A list of projects with progress indicators. The first project is "1.1 - Unnamed" with 92% Outcomes with Measures. The second is "1.2 - Unnamed" with 91% Measures with Targets. The third is "1.3 - Unnamed" with 81% Targets with Findings. A red arrow points to the "All Projects" dropdown menu.
- Your Team Stats:** A summary of team performance. It shows 8 Accreditation Projects, 141 Assessment Projects, and 0 Program Reviews. A large blue box indicates "149 Projects". Below this are three circular icons: 1082 Findings Entered, 741 Reports Generated, and 127 Narratives Written. A red arrow points to the "Any Period" dropdown menu.
- Announcement Feed:** A section titled "Thank you (and next steps)" dated Aug 19, 2019. The text reads: "HUGE shout out and thank you to everyone for all your work to complete the 2018-19 unit assessment reports! We are pleased to say that we have wrapped up the cycle for last year and are moving on to focus on development of the 2019-20 plans. (click through to see more)". A red arrow points to the "Announcement Feed" dropdown menu.

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

This is a duplicate of the dashboard screenshot above, showing the same sections and data. Red arrows highlight the "Assessment Project Statuses", "All Projects", "Your Team Stats", and "Announcement Feed" dropdown menus.

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.

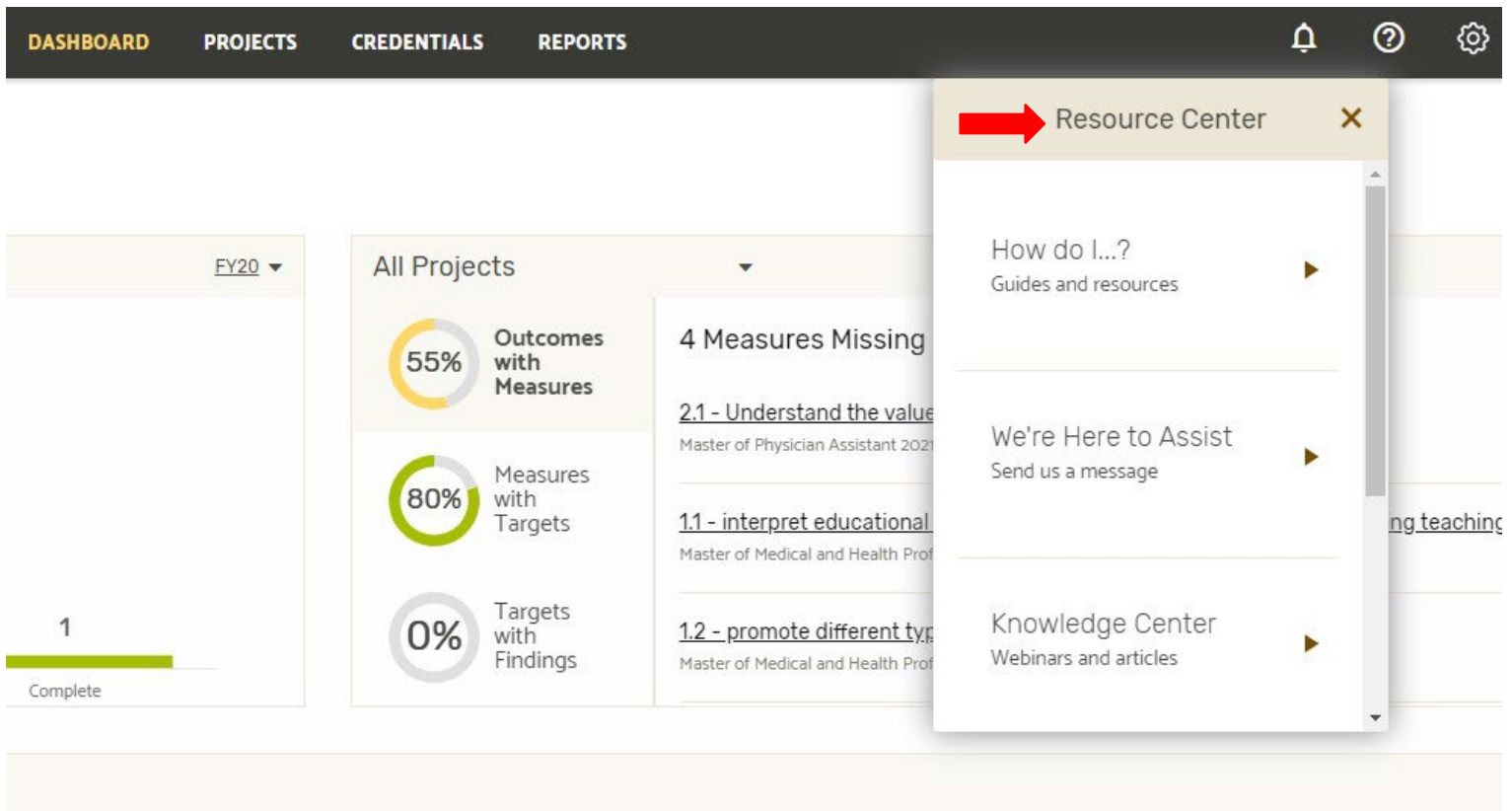
The navigation bar is a dark grey horizontal bar at the top of the page. It contains four main navigation items: "DASHBOARD", "PROJECTS", "CREDENTIALS", and "REPORTS". A red arrow points to the "REPORTS" item. To the right of these items are three icons: a bell (notifications), a question mark (help), and a gear (settings).

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).



Accessing Weave Technical Assistance

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.

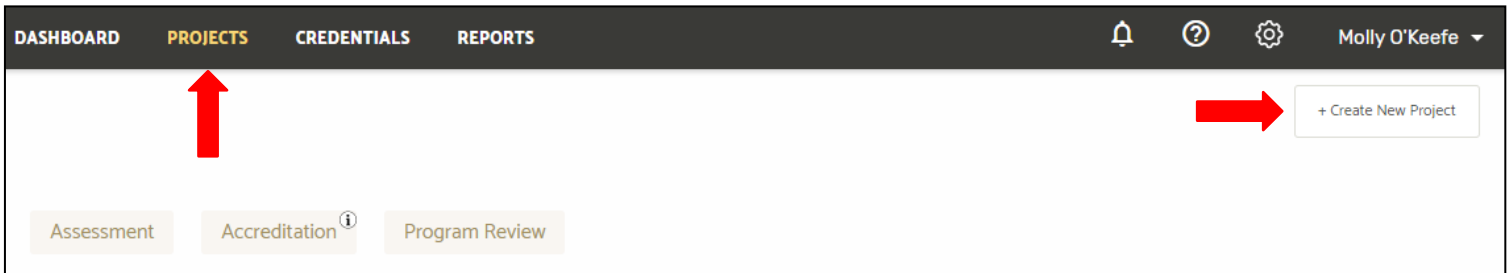


Section II: Creating a New Project

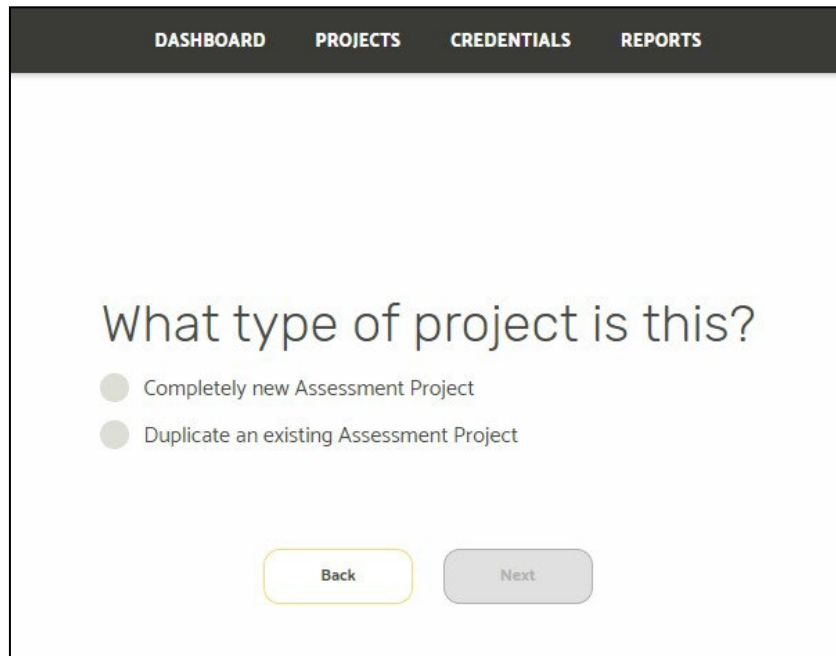
Now that you have accessed and explored the Weave system, it is time to create a new project. There are two approaches to creating a new project at the beginning of new assessment cycle- creating a completely new project from scratch, or copying an already existing project from a previous cycle. Creating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

What type of project is this?

Completely new Assessment Project

Duplicate an existing Assessment Project

Back Next

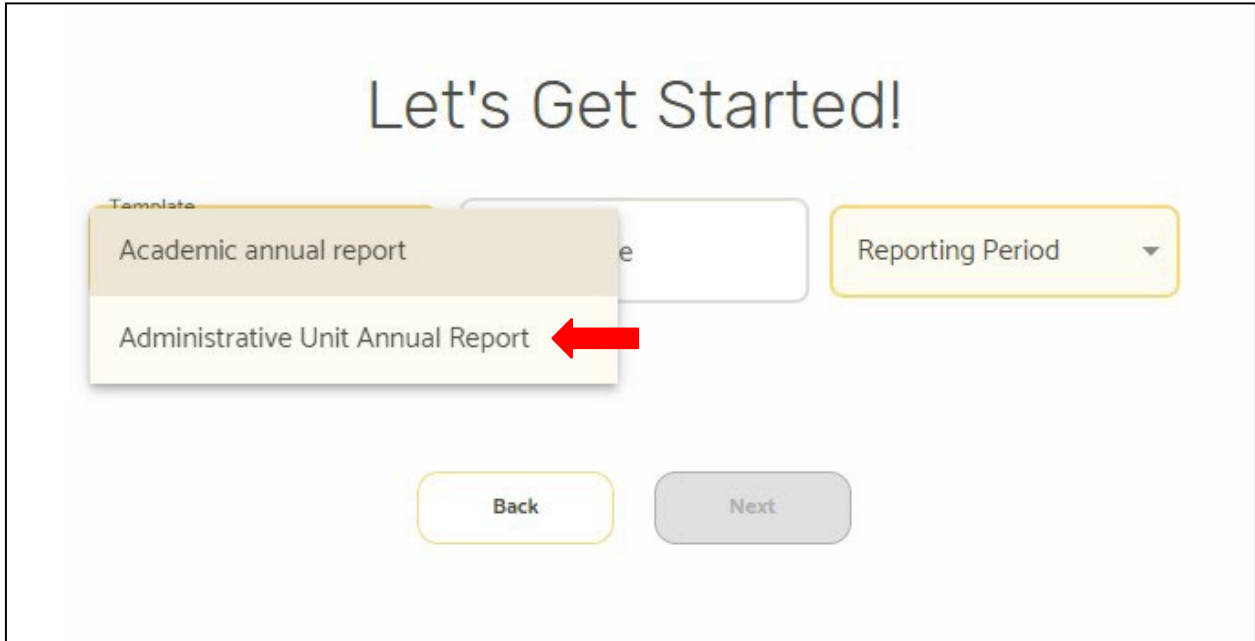
Step 4: The next screen will give you the options to select a project template, give the project a title, and select the appropriate reporting period for the new project. As mentioned earlier, you can select either an academic or fiscal year as the reporting period, depending on which is most applicable 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.

Let's Get Started!

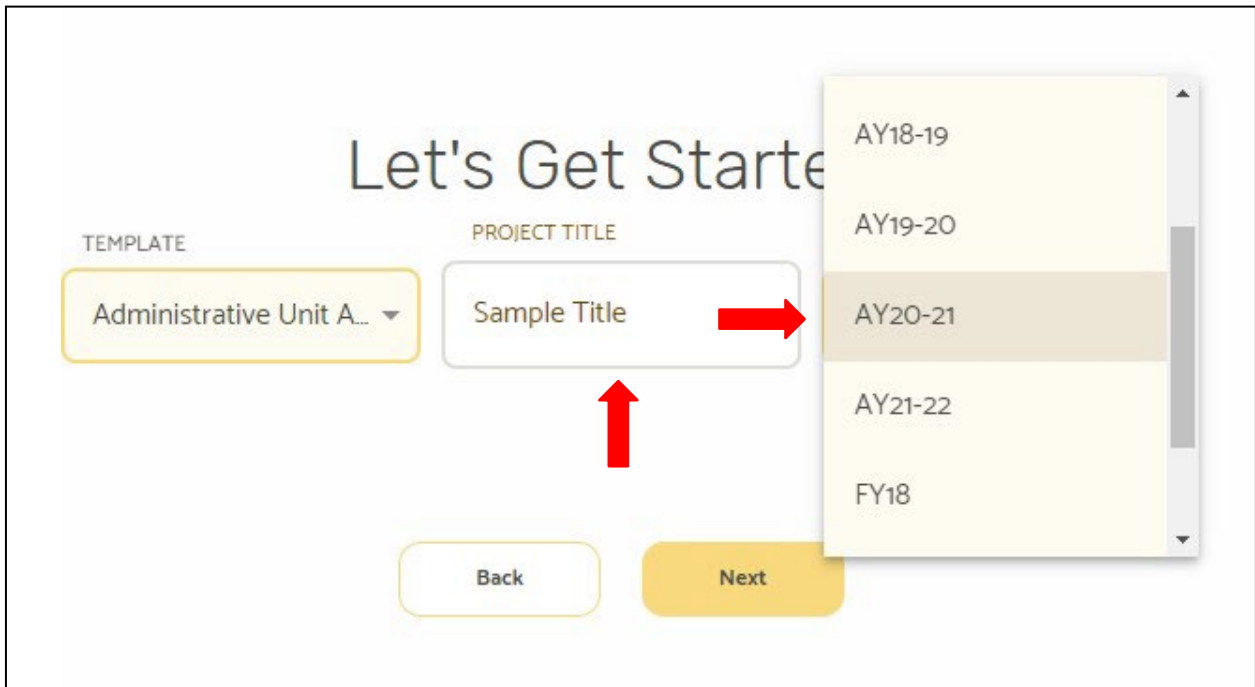
Template Project Title Reporting Period

Back Next

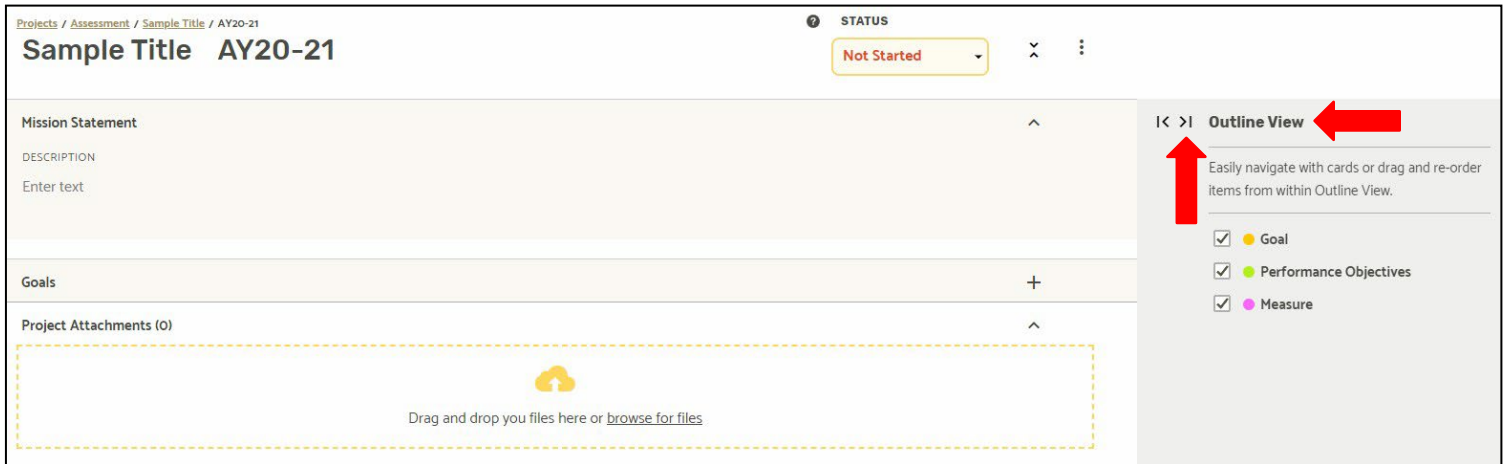
Step 5: For administrative units, select “Administrative Unit Annual Report” from the template option drop down box.



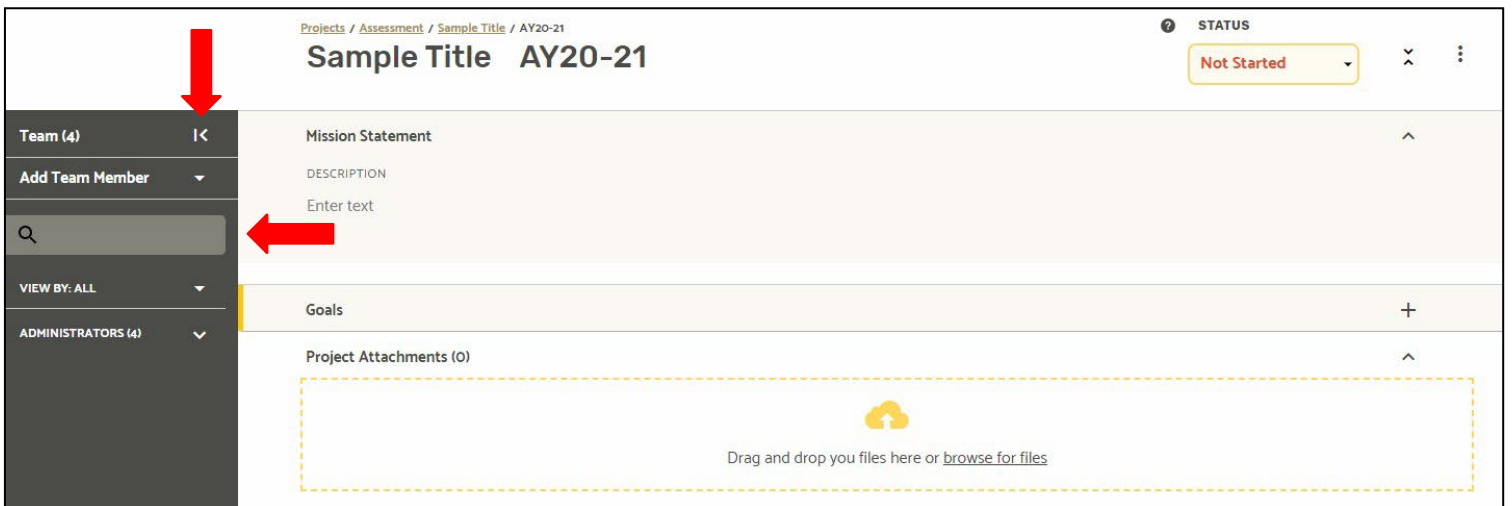
Step 6: Give your project a title (usually your unit name) and select the appropriate reporting period from the drop down for the current/upcoming unit assessment cycle and hit “Next”.



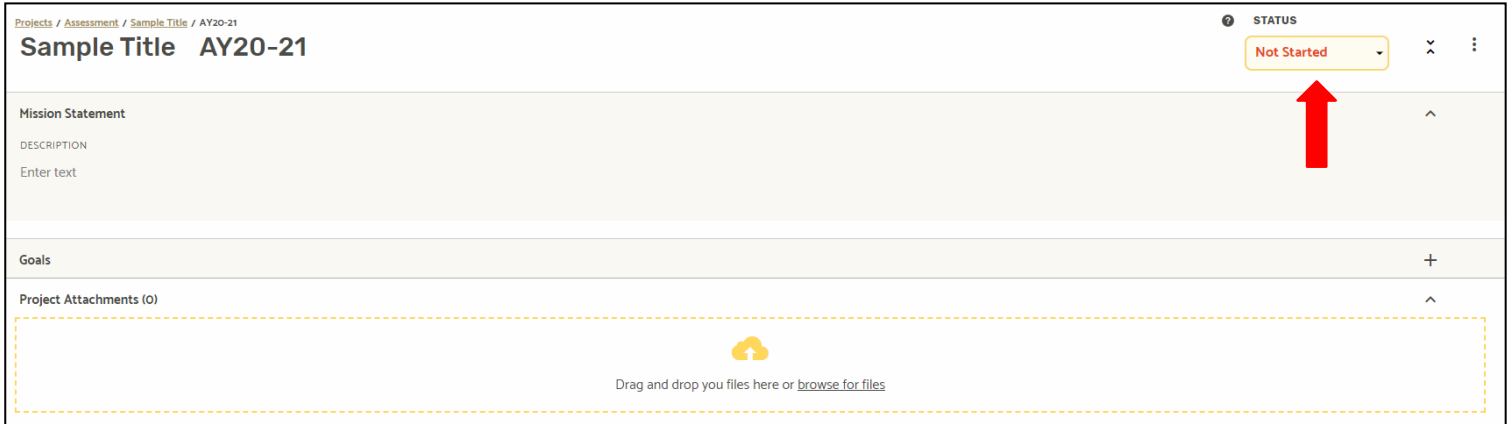
Step 7: The first time you access the new Weave project interface, it will be useful to review the new layout, as it varies slightly from the 2019-20 design (though the content options remain the same). The first thing you will see is the “Outline View” panel on the right side of the frame. It allows 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”.



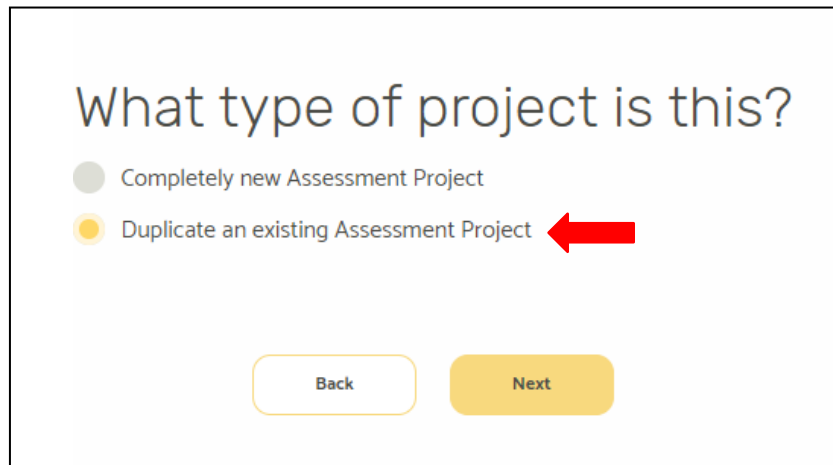
Step 9: Your new project at this point will be completely empty of content, and will have “Not Started” as the status in the upper right corner of the page.



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 list of 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.

Which Project?

FILTER PROJECTS

FILTER BY REPORTING PERIOD

Title ▾	Year
<input checked="" type="radio"/> Strategic Planning and Institutional Effectiveness	FY20

1

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.

Confirm the title and reporting period for the new project

PROJECT TITLE

REPORTING PERIOD

Your new project will be linked to Strategic Planning and Institutional Effectiveness, FY20.
Would you like to use findings data from the previous project to start the new one?

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.

Confirm the title and reporting period for the new project

PROJECT TITLE

REPORTING PERIOD

Your new project will be linked to Strategic Planning and Institutional Effectiveness, FY20.
Would you like to use findings data from the previous project to start the new one?

BackNo, start emptyYes, start pre-filled

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.

Projects / Assessment / Sample Title / AY20-21

Sample Title AY20-21

Mission Statement

DESCRIPTION

Enter text

Goals

Project Attachments (0)

Drag and drop your files here or [browse for files](#)

STATUS

Not Started

All projects start with this status until content is added.

In Progress

Update your project to this status when content is added.

Internal Review

Response to this Status to let your Team know that it's complete and ready for Internal Review.

Complete

Update your project to this status to indicate it is complete and ready for final review.

Section III: Entering Content into Your Project

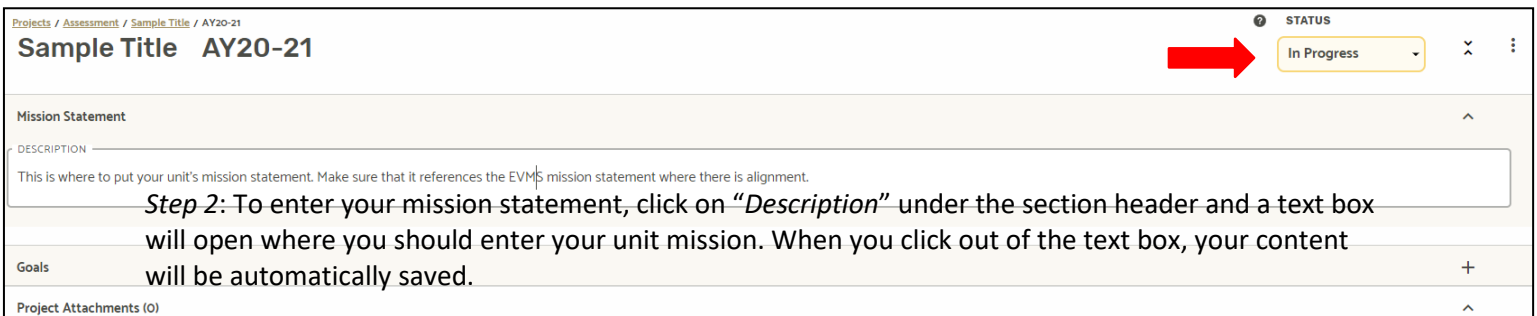
Now that you have created a new project, or copied over an existing project, you are ready to enter your annual unit assessment plan content. The following section will guide you through the various sections of the Weave report you will need to complete to finish the planning phase of your annual cycle.

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.



The screenshot shows the top navigation bar with the breadcrumb "Projects / Assessment / Sample Title / AY20-21" and the project name "Sample Title AY20-21". On the right, there is a "STATUS" dropdown menu with "In Progress" selected. A red arrow points to this dropdown. Below the navigation bar, the "Mission Statement" section is expanded, showing a "DESCRIPTION" text box. The text box contains the instruction: "This is where to put your unit's mission statement. Make sure that it references the EVM's mission statement where there is alignment." A red arrow points to the text box. Below the text box, there are sections for "Goals" and "Project Attachments (0)".

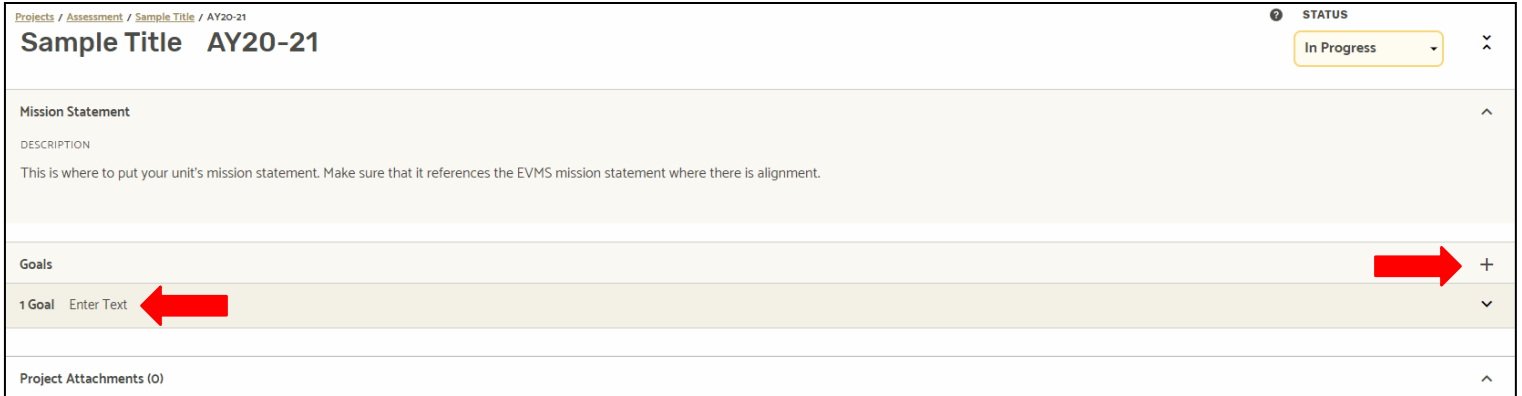
Step 2: To enter your mission statement, click on "Description" under the section header and a text box will open where you should enter your unit mission. When you click out of the text box, your content will be automatically saved.



The screenshot shows the same interface as the previous one, but with a red arrow pointing to the "DESCRIPTION" text box. The text box is now empty, indicating that the user has clicked on it and is ready to enter their mission statement.

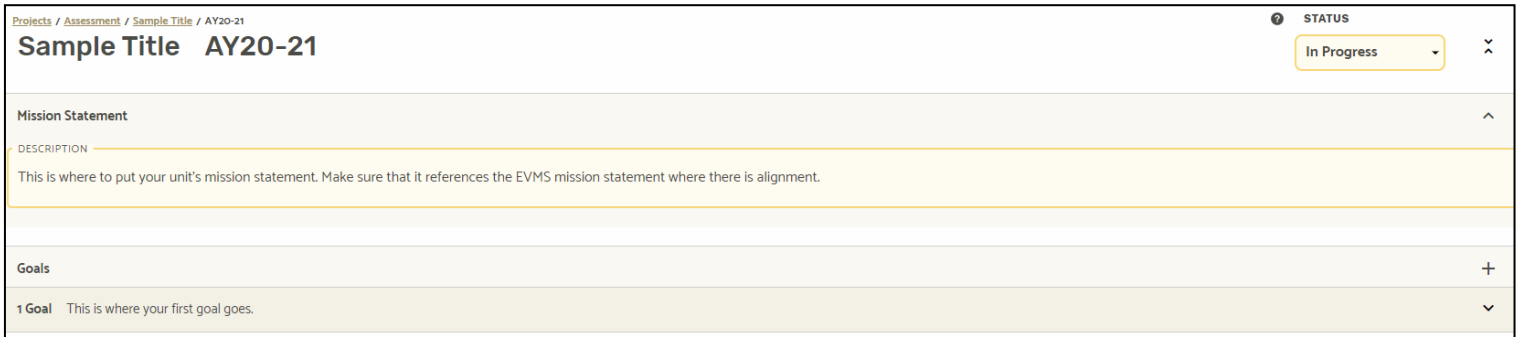
Entering Your Goals

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.



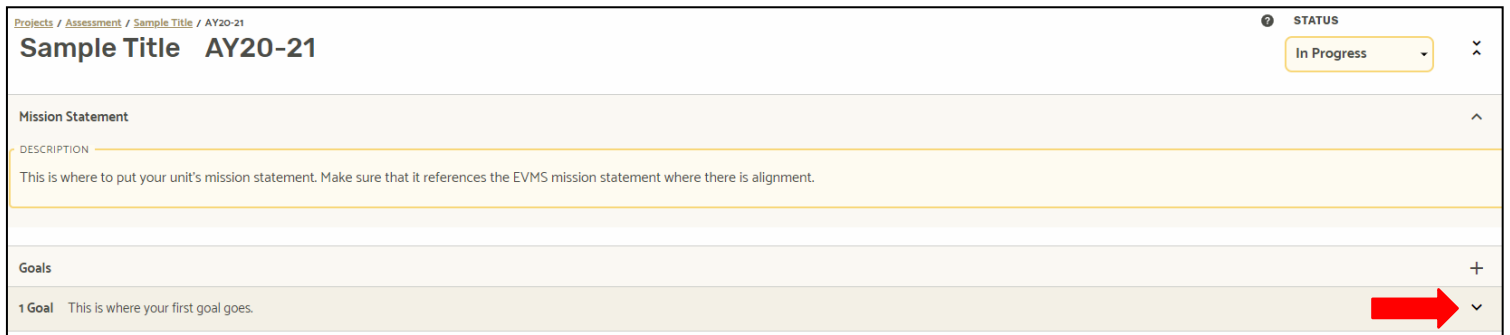
The screenshot shows the top navigation bar with 'Projects / Assessment / Sample Title / AY20-21' and a 'STATUS' dropdown set to 'In Progress'. Below this is the 'Mission Statement' section with a 'DESCRIPTION' field. The 'Goals' section is highlighted, and a red arrow points to a plus sign on its right side. Below the 'Goals' section, a '1 Goal' entry is visible with a red arrow pointing to the 'Enter Text' field.

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.



The screenshot shows the top navigation bar with 'Projects / Assessment / Sample Title / AY20-21' and a 'STATUS' dropdown set to 'In Progress'. Below this is the 'Mission Statement' section with a 'DESCRIPTION' field. The 'Goals' section is highlighted, and a red arrow points to a plus sign on its right side. Below the 'Goals' section, a '1 Goal' entry is visible with a red arrow pointing to the 'Enter Text' field.

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.



The screenshot shows the top navigation bar with 'Projects / Assessment / Sample Title / AY20-21' and a 'STATUS' dropdown set to 'In Progress'. Below this is the 'Mission Statement' section with a 'DESCRIPTION' field. The 'Goals' section is highlighted, and a red arrow points to a plus sign on its right side. Below the 'Goals' section, a '1 Goal' entry is visible with a red arrow pointing to the 'Enter Text' field.

Goals	+
1 Goal This is where your first goal goes.	^ ⋮
DESCRIPTION You can add any relevant content information here.	
Performance Objectives	+

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.

Goals	+
1 Goal This is where your first goal goes.	^ ⋮
DESCRIPTION You can add any relevant content information here.	
Performance Objectives	+ Program Level
Project Attachments (0)	

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.

Performance Objectives	+
1.1 Performance Objectives Enter Text	^ ⋮
DESCRIPTION Enter text	
Supported Initiatives (0)	+
Program/Unit Improvement Plan	+
Measures	+


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.

Performance Objectives	+
1.1 Performance Objectives This is where your performance objective goes.	^ ⋮
DESCRIPTION This is where you can enter additional information about your performance objective. 	
Supported Initiatives (0)	+
Program/Unit Improvement Plan	+
Measures	+

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.

Performance Objectives	+
1.1 Performance Objectives This is where your performance objective goes.	^ ⋮
DESCRIPTION This is where you can enter additional information about your performance objective.	
Supported Initiatives (0)	+ 
Program/Unit Improvement Plan	+
Measures	+

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*”.

Goals	+
1 Goal This is where your first goal goes.	^ ⋮
DESCRIPTION You can add any relevant content information here.	
Performance Objectives	+
1.1 Performance Objectives This is where your performance objective goes.	^ ⋮
DESCRIPTION This is where you can enter additional information about your performance objective.	
Supported Initiatives (0)	
Add Supported Initiatives to Performance Objectives 1.1	X
Select Supported Initiatives 	

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.

Supported Initiatives (1) ^

Add Supported Initiatives to Performance Objectives 1.1

SELECT SUPPORTED INITIATIVES

Institutional Priorities

#	DESCRIPTION
<input type="checkbox"/>	1. EVMS Mission Statement
<input type="checkbox"/>	2. Family Educational Rights & Privacy Act (FERPA)
<input type="checkbox"/>	3. Health Insurance Portability & Accountability Act of 1996 (HIPAA)
<input type="checkbox"/>	4. General Data Protection Regulation (GDPR)
<input type="checkbox"/>	5. IT Infrastructure Library (ITIL)
<input type="checkbox"/>	6. SACSCOC Reaffirmation
<input checked="" type="checkbox"/>	7. LCME Reaccreditation

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.

Supported Initiatives (1) ^

Add Supported Initiatives to Performance Objectives 1.1

SELECT SUPPORTED INITIATIVES

Strategic Initiatives

Search...

Select Collection

EVMS Strategic Plan FY19-FY22


Supported Initiatives (1) ^

Add Supported Initiatives to Performance Objectives 1.1

SELECT SUPPORTED INITIATIVES

Strategic Initiatives

EVMS Strategic Plan FY19-FY22

#	DESCRIPTION
<input type="checkbox"/>	Goal A1 Examine wellness across the EVMS community and develop an institution-wide, coordinated wellness initiative.
<input type="checkbox"/>	Goal A2 Develop a data collection, management, and reporting infrastructure to facilitate access to information internally and externally.
<input checked="" type="checkbox"/>	Goal A3 Enhance communication among EVMS leadership, faculty, staff, residents, fellows, and partners and the communities of Hampton Roads. 
<input type="checkbox"/>	Goal C1 Right-size the academic faculty in the five core clinical departments with EVMS Medical Group with respect to undergraduate medical education.
<input type="checkbox"/>	Goal C2 EVMS Medical Group will become "ACO ready" to participate in Advanced Payment Models, vital to our financial success as well as our responsibility as educators to provide model practices.
<input type="checkbox"/>	Goal E1 Strengthen the undergraduate medical education program.
<input type="checkbox"/>	Goal E2 Strengthen the School of Health Professions educational programs.
<input type="checkbox"/>	Goal E3 Develop and implement a Strategic Enrollment Plan for EVMS educational programs.
<input type="checkbox"/>	Goal E4 Improve the clinical education sites for programs and maintain critical relationships with key partners that teach.
<input type="checkbox"/>	Goal R1 Enhance multidisciplinary research that aligns with funding opportunities, institutional goals and community health needs.

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.

Supported Initiatives (2) ^ 

+

INSTITUTIONAL PRIORITIES (1)

LCME Reaccreditation

STRATEGIC INITIATIVES (1)

EVMS Strategic Plan FY19-FY22: Enhance communication among EVMS leadership, faculty, staff, residents, fellows, and partners and the communities of Hampton Roads.

Entering Your Program/Improvement Plan

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.

Program/Unit Improvement Plan ^

DESCRIPTION
Enter text

BUDGET SOURCE AMOUNT DUE DATE STATUS

Enter text \$0.00 --/--/---- []

+ ADD ACTION ITEM

ACTION ITEMS (0) CREATED DUE STATUS

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.

Program/Unit Improvement Plan ^

DESCRIPTION
Your program/unit improvement plan goes here.

BUDGET SOURCE AMOUNT DUE DATE STATUS

Budget source goes here. \$0.00 [] [Planned
Complete
In Progress]

+ ADD ACTION ITEM

ACTION ITEMS (0) CREATED DUE STATUS

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.

Supported Initiatives (2) v

Program/Unit Improvement Plan ^

DESCRIPTION
Your program/unit improvement plan goes here.

BUDGET SOURCE AMOUNT DUE DATE STATUS

Budget source goes here. \$0.00 [] []

+ ADD ACTION ITEM

ACTION ITEMS (1) CREATED DUE STATUS

Enter text 6/18/2020 --/--/---- []

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.

Supported Initiatives (2) ▾

Program/Unit Improvement Plan ▲

DESCRIPTION
Your program/unit improvement plan goes here.

BUDGET SOURCE AMOUNT DUE DATE STATUS

Budget source goes here. \$0.00

+ ADD ACTION ITEM

ACTION ITEMS (1)	CREATED	DUE	STATUS
Enter text	6/18/2020	--/--/----	<input type="text"/>

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.

Performance Objectives +

1.1 Performance Objectives This is where your performance objective goes. ▲

DESCRIPTION
This is where you can enter additional information about your performance objective.

Supported Initiatives (2) ▾

Program/Unit Improvement Plan ▾

Measures +

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.

Measures +

1.1.1 Measure Enter Text ←

MEASUREMENT TYPE
Not Set ▾

DESCRIPTION
Enter text

Target (0) ←

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.

The screenshot shows a form titled "Measures" with a sub-header "1.1.1 Measure" and the text "Enter Text". Below this, there is a section for "MEASUREMENT TYPE" with a dropdown menu currently set to "Not Set". A red arrow points to this dropdown. Below that is a "DESCRIPTION" section with a text input field containing "Enter text", also indicated by a red arrow. At the bottom, there is a "Target (0)" section with a plus sign to its right.

“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.

This screenshot shows the "Measures" form with the "MEASUREMENT TYPE" dropdown menu open. The dropdown has a search bar at the top and a list of options below, including "Not Set", "AACU Value Rubric - Ethics - Academic Direct", "AACU Value Rubric - Oral Communication - Academic Direct", and "AACU Value Rubric - Teamwork - Academic Direct". A red arrow points to the dropdown menu.

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.

The screenshot shows the "Measures" form with the "MEASUREMENT TYPE" dropdown set to "AACU Value Rubric - Ethics - Academic Direct". The "DESCRIPTION" section contains the text "You can describe your measure here.". At the bottom, the "Target (0)" section is expanded, indicated by a red arrow pointing to the plus sign on the right.

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”).

The screenshot shows a form titled "Target (1)" with a "+" icon in the top right corner. Below the title is a horizontal line. Underneath, the ID "1.1.1.1" is displayed. The form is divided into several sections, each with a label and a text input field:

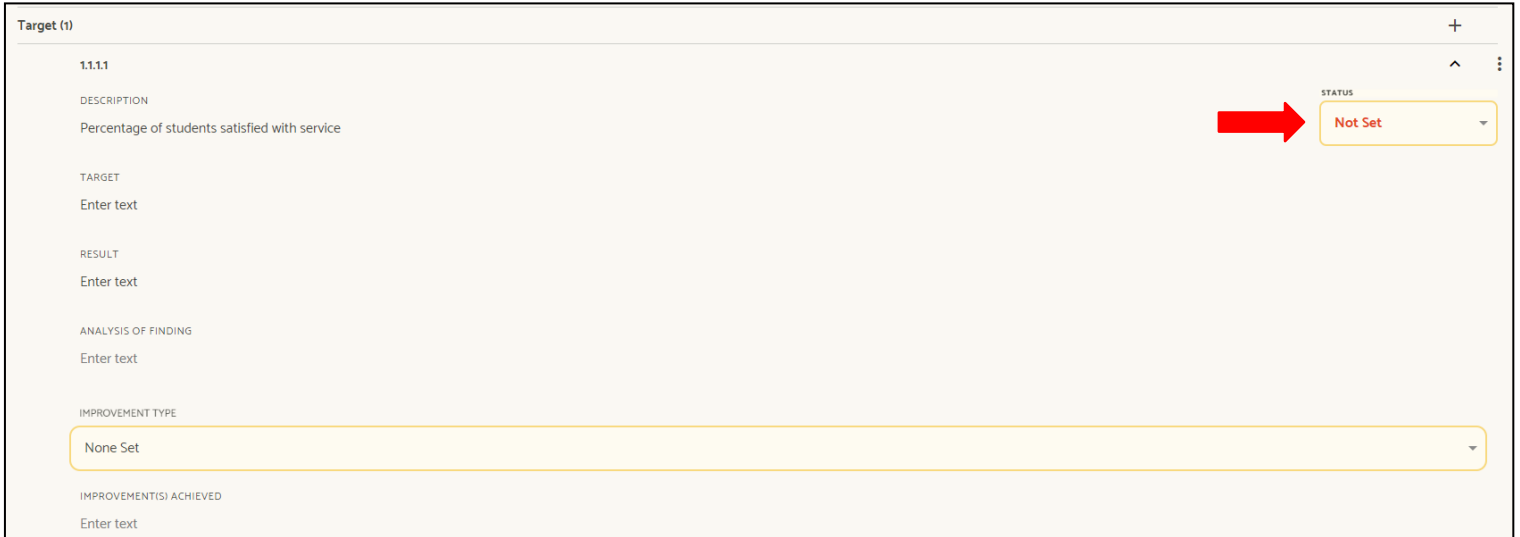
- DESCRIPTION:** The input field contains the placeholder text "Enter text". A red arrow points to this field.
- TARGET:** The input field contains the placeholder text "Enter text".
- RESULT:** The input field contains the placeholder text "Enter text".
- ANALYSIS OF FINDING:** The input field contains the placeholder text "Enter text".
- IMPROVEMENT TYPE:** A dropdown menu is open, showing "None Set" as the selected option.
- IMPROVEMENT(S) ACHIEVED:** The input field contains the placeholder text "Enter text".

In the top right corner, there is a "STATUS" dropdown menu with "Not Set" selected.

The screenshot shows the same "Target (1)" form as above, but with the "DESCRIPTION" field updated. The input field now contains the text "Percentage of students satisfied with service". A red arrow points to this text. All other fields and the "IMPROVEMENT TYPE" dropdown remain the same as in the previous screenshot.

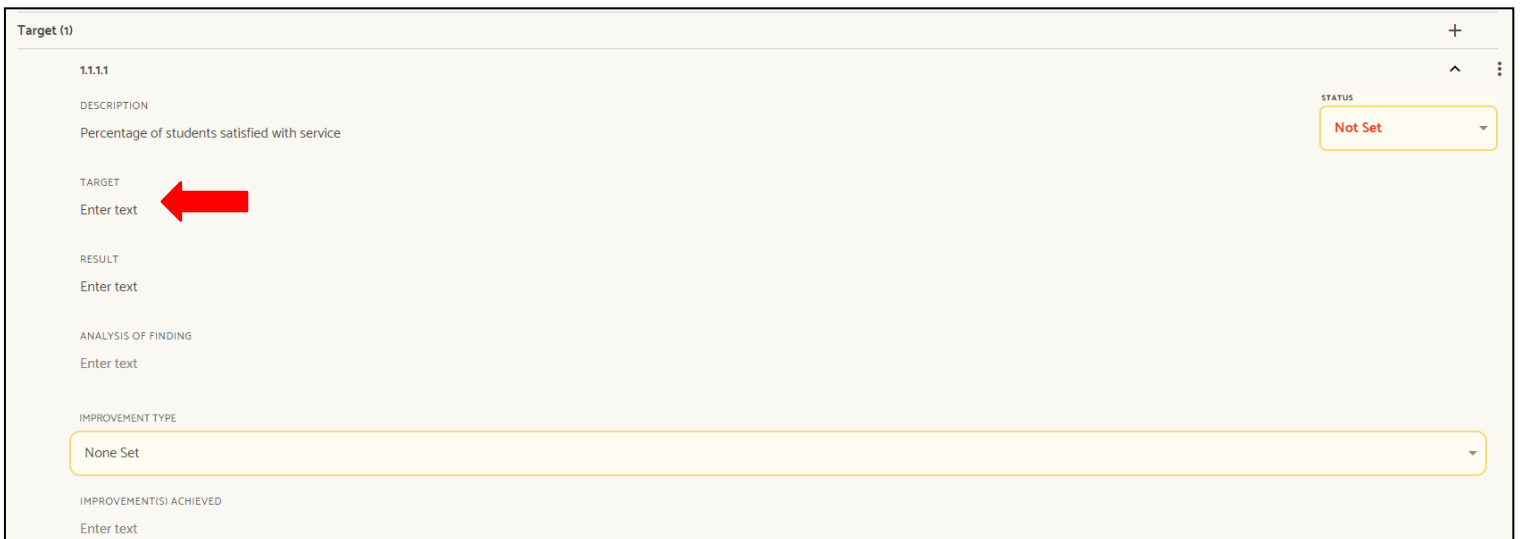
Step 2: At the time you enter your target at the beginning of your annual unit assessment cycle (the planning phase), you will not change the target status indicator button directly below the “*Target*”

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.



The screenshot shows a form titled "Target (1)" with several sections: "1.1.1.1", "DESCRIPTION" (Percentage of students satisfied with service), "TARGET" (Enter text), "RESULT" (Enter text), "ANALYSIS OF FINDING" (Enter text), "IMPROVEMENT TYPE" (None Set), and "IMPROVEMENT(S) ACHIEVED" (Enter text). A red arrow points to the "STATUS" dropdown menu, which is currently set to "Not Set".

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.



The screenshot shows the same "Target (1)" form as above. A red arrow points to the "TARGET" section, which contains the text "Enter text".

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.

Target (1)

1.1.1.1

DESCRIPTION
Percentage of students satisfied with service

STATUS
Not Set

TARGET
At least 80% of respondents indicated "satisfied" or "very satisfied".

RESULT
Enter text

ANALYSIS OF FINDING
Enter text

IMPROVEMENT TYPE
None Set

IMPROVEMENT(S) ACHIEVED
Enter text

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.

Target (1)

1.1.1.1

DESCRIPTION
Percentage of students satisfied with service

STATUS
Not Set

TARGET
At least 80% of respondents indicated "satisfied" or "very satisfied".

RESULT
Enter text

ANALYSIS OF FINDING
Enter text

IMPROVEMENT TYPE
None Set

IMPROVEMENT(S) ACHIEVED
Enter text

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.

Target (1) +

1.1.1.1 ^ ⋮

DESCRIPTION
Percentage of students satisfied with service

STATUS
Not Set ▼

TARGET
At least 80% of respondents indicated "satisfied" or "very satisfied".

RESULT
72% of respondents indicated "satisfied" or "very satisfied".

ANALYSIS OF FINDING
The benchmark target was not met this year due to an unforeseen departure of a critical team member, leaving the initiative temporarily short staffed and without leadership. It is expected that once that member is replaced, the target will be met under full service capacity.

IMPROVEMENT TYPE
None Set ▼

IMPROVEMENT(S) ACHIEVED
After realizing the impact of unexpected staff departures, contingency plans to ensure maintenance of full service levels were established, including buying time from staff in other units on a temporary basis. Additionally, succession planning was initiated with the next level of leadership to ensure that someone is ready to step into the position duties as soon as possible after departure of other staff.

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.

Target (1) +

1.1.1.1 ^ ⋮

DESCRIPTION
Percentage of students satisfied with service

STATUS
Not Set ▼

TARGET
At least 80% of respondents indicated "satisfied" or "very satisfied".

RESULT
72% of respondents indicated "satisfied" or "very satisfied".

ANALYSIS OF FINDING 
The benchmark target was not met this year due to an unforeseen departure of a critical team member, leaving the initiative temporarily short staffed and without leadership. It is expected that once that

search...

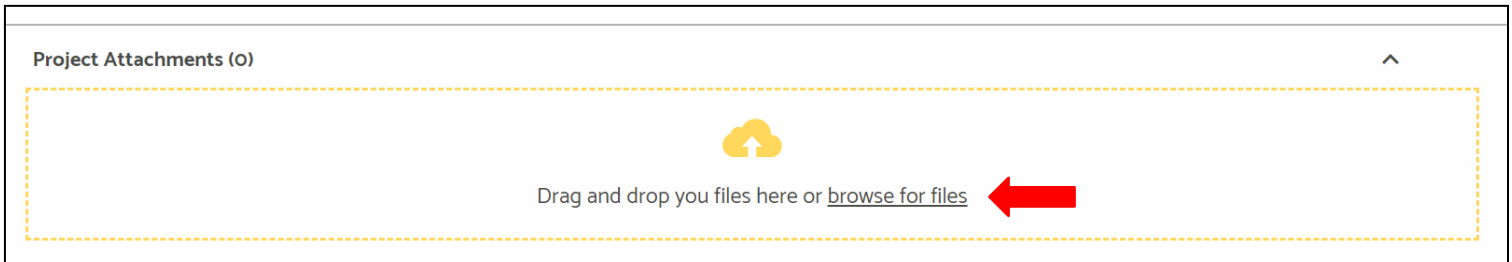
- Curriculum audit
- Implemented new instructional techniques
- No Improvements Deemed Necessary
- Revised BRCC policy or procedure to align with VCCS, SCHEV, SACSCOC requirement

test

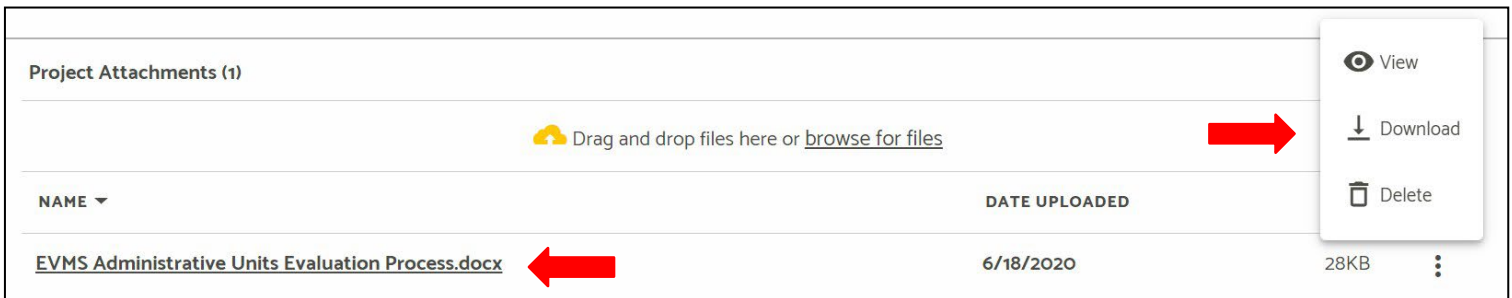
Section IV: Attaching Documentation

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*”.

The screenshot shows a web interface for a project titled "Sample Title AY20-21". At the top left, there is a "STATUS" label with a red arrow pointing to it. Below this, a dropdown menu is open, showing four status options: "Internal Review" (selected with a checkmark and a red arrow), "Not Started", "In Progress", and "Complete". Each status option includes a brief description of what that status means for the project. The background of the page shows a table with rows of project data, including mission statements and goals.

STATUS	Internal Review	Not Started	In Progress	Internal Review	Complete
All projects start with this status until content is added.	Update your project to this status when content is added.	Update your Response to this Status to let your Team know that it's complete and ready for Internal Review.	Update your project to this status to		

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.

The screenshot shows a 'STATUS' dropdown menu with the following options:

- Complete** (selected): Update your project to this status to indicate it is complete and ready for final review.
- Not Started**: All projects start with this status until content is added.
- In Progress**: Update your project to this status when content is added.
- Internal Review**: Update your Response to this Status to let your Team know that it's complete and ready for Internal Review.

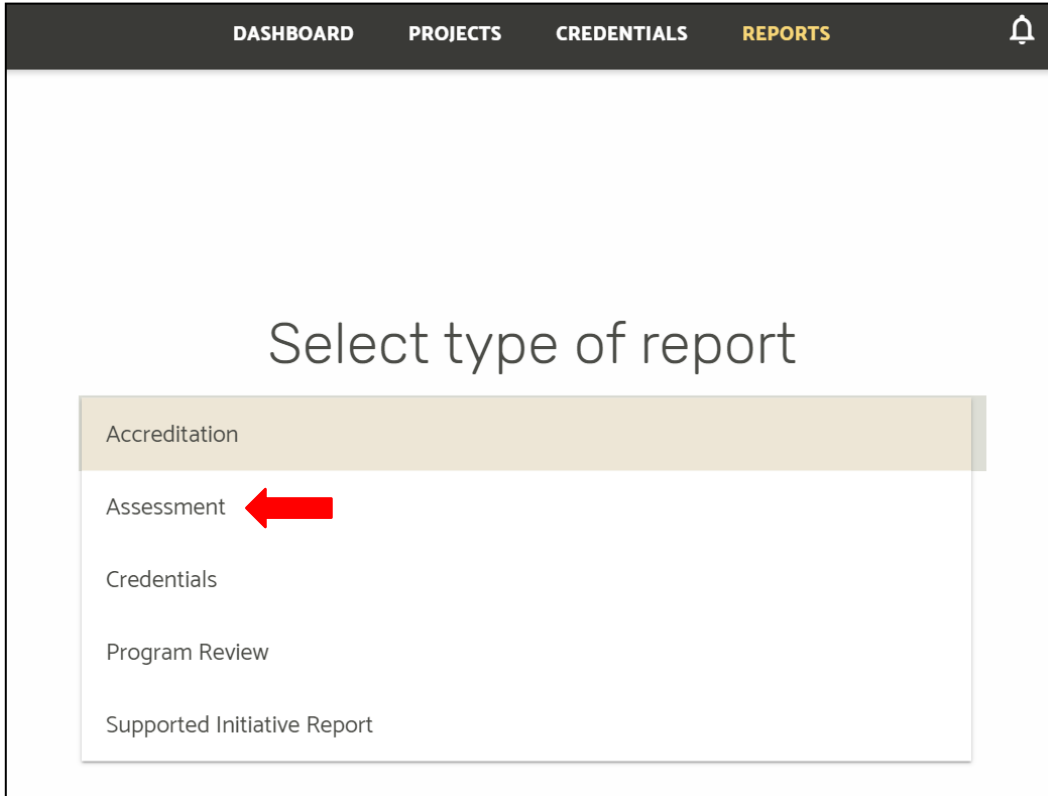
Red arrows point to the 'STATUS' header and the selected 'Complete' option.

Creating a Final Report Document

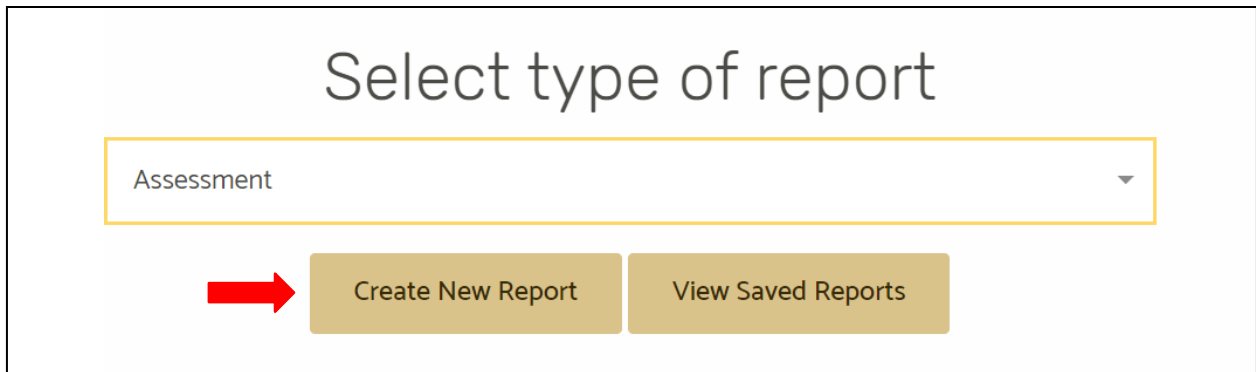
Step 1: Creating a .pdf document version of your final project to keep for your records can be done by clicking on the “Reports” tab on the navigation bar at the top of your screen.



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.

The screenshot shows a form titled "Create new report" with the following fields and controls:

- REPORT FORMAT**: A section header above a dropdown menu labeled "Select Report Type".
- Report title**: A text input field.
- Executive Summary (500 character max)**: A larger text input field with a double-slash icon at the bottom right.
- Report description (Will not be included in report - for internal use only)**: A text input field with a double-slash icon at the bottom right.
- Navigation**: Two buttons at the bottom, "Back" (highlighted in yellow) and "Next" (greyed out).

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.

Create new report [?]

REPORT FORMAT

Page View

Table View

Report title

Executive Summary (500 character max)

Report description (Will not be included in report - for internal use only)

Back Next

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”.

Which projects are included in this report?



PROJECT TITLE

Sample

REPORTING PERIOD

None Selected

TEMPLATE

None Selected

STATUS

Select Status

1 Projects selected

Select	Project Title	Template	Reporting Period	Status
<input type="checkbox"/>	Sample Project	Administrative Unit Annual Report	FY20	Completed
<input checked="" type="checkbox"/>	Sample Title	Administrative Unit Annual Report	AY20-21	Completed

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).

Select elements for the report

- Report Elements
- Cover Page
- Logo on Cover Page
- Executive Summary
- Date Stamp
- Table of Contents
- Mission Statement
- Goals
- Performance Objectives
- Supported Initiatives
- Program/Unit Improvement Plan

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

<input checked="" type="checkbox"/>	Program/Unit Improvement Plan
<input checked="" type="checkbox"/>	Action Items
<input checked="" type="checkbox"/>	Measures
<input checked="" type="checkbox"/>	Measurement Type
<input checked="" type="checkbox"/>	Target
<input checked="" type="checkbox"/>	Result
<input checked="" type="checkbox"/>	Analysis of Finding
<input checked="" type="checkbox"/>	Improvements Achieved
<input checked="" type="checkbox"/>	Attachments

Back Compile Report

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:

Assessment Report: Sample Report Compiled by: Molly O’Keefe Compiled Date: 06/18/2020 [← Back](#)

Save Report

Table of Contents —

Sample Title
AY20-21

Attachments —

Attachment	Options
EVMS Administrative Units Evaluation Process.docx	

Report View —

Sample Title **AY20-21**



Completed **2 GOALS 1 OUTCOMES 1 MEASURES 1 TARGETS 1 FINDINGS 1 ATTACHMENTS**

Mission Statement
This is where to put your unit’s mission statement. Make sure that it references the EVMS mission statement where there is alignment.

1 Goal
This is where your first goal goes.
You can add any relevant content information here.

1.1 Performance Objectives
This is where your performance objective goes.
This is where you can enter additional information about your performance objective.

Table Format:

Attachment	Options	Performance Objectives	Measures	Target	Result
EVMS Administrative Units Evaluation Process.docx	 	<p>1 Goal This is where your first goal goes. You can add any relevant content information here.</p>			
		<p>Outcome has action plan 1.1 This is where your performance objective goes. This is where you can enter additional information about your performance objective. Supported Initiatives (2)</p> <hr/> <p>INSTITUTIONAL PRIORITIES</p>	<p>1.1.1 Measure #1 goes here. You can describe your measure here.</p>	<p>1.1.1.1 Percentage of students satisfied with service At least 80% of respondents indicated "satisfied" or "very satisfied".</p>	<p>72% of respondents indicated "satisfied" or "very satisfied". ANALYSIS OF FINDING The benchmark target was not met this year due to an unforeseen departure of a critical team member, leaving the initiative temporarily short staffed and without leadership. It is expected that once that member is replaced, the target will</p>

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.

Assessment Report: Sample Report Compiled by: Molly O'Keefe Compiled Date: 06/18/2020 [← Back](#)




 [Save Report](#)

Table of Contents —

Sample Title
AY20-21

Attachments —

Attachment	Options
EVMS Administrative Units Evaluation Process.docx	 

Report View —

Sample Title **AY20-21**

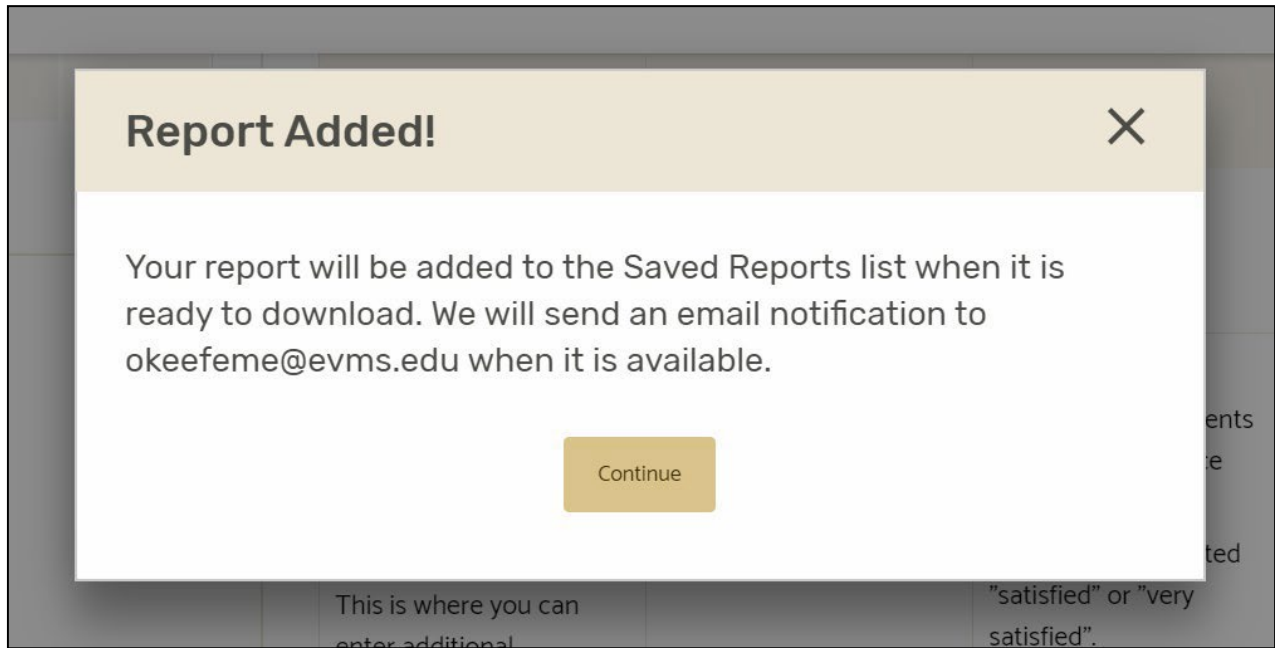
Completed **2 GOALS 1 OUTCOMES 1 MEASURES 1 TARGETS 1 FINDINGS 1 ATTACHMENTS**

Mission Statement
This is where to put your unit's mission statement. Make sure that it references the EVMS mission statement where there is alignment.


1 Goal
This is where your first goal goes.
You can add any relevant content information here.

1.1 Performance Objectives
This is where your performance objective goes.
This is where you can enter additional information about your performance objective.


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.

Saved Reports					
Filter reports					
Date	Report Name	Description	Compiled By		
JUN 18, 2020	[Processing] Sample Report		Molly O'Keefe		Processing...

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.




Your Weave Report is ready for download.

[Login to Weave](#)

Looking for resources to help you complete those to-dos?
Check out the [Weave Knowledge Center](#) for webinars, guides and more.

Saved Reports

Filter reports

Date	Report Name	Description	Compiled By		
JUN 18, 2020	Sample Report		Molly O'Keefe		Download ⋮

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!

