

Assessment Management System (AMS)

USER GUIDE



CALIFORNIA STATE UNIVERSITY
FULLERTON[™]

Office of Assessment and Institutional Effectiveness

data@fullerton.edu

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HOW TO USE THIS GUIDE

Within the instructions are the following types of references:

Buttons and Icons: indicated by bold text enclosed in brackets, e.g. **[Done]**

Fields: indicated by bold text, e.g. **Outcome Abbreviation**

Navigation Tabs & Links: indicated by underlined text, e.g. Admin Unit

Tips & Helpful Information: indicated by bulleted text, e.g. • This application is compatible with all browsers.

ACCESSING AND NAVIGATING THE AMS

ACCESSING THE AMS

University employees who have been granted access to the AMS can log into the AMS at <http://www.fullerton.edu/ams> or use the University portal (AMS Assessment Management System app).

- Use CSUF user name and password.

AMS ACCESS REQUEST FORM

To request an AMS user account, please complete the AMS access request form and email to data@fullerton.edu. The AMS access request form and other useful assessment reporting documents are available at <http://www.fullerton.edu/data/assessment/reporting/>

NAVIGATING THE AMS

LOCATE UNIT

Use the search bar at the top of the screen to locate unit. Begin typing and then select unit from drop-down list that appears, OR click the down triangle to display a drop-down list of units. Only the unit(s) user has permission to access will be displayed. If the unit is not in the drop-down list, contact data@fullerton.edu.

The screenshot shows the Nuventive AMS interface. At the top, there is a search bar with the text 'AA - Assessment and Institutional Effectiveness' and a dropdown arrow. To the right of the search bar is a notification bell icon with a red '0' and a user profile icon with the text 'Welcome, babcockj'. Below the search bar is a navigation menu with icons for Home, Admin Unit, Unit Assessment, Mapping, Reports, and Documents. The main content area displays a 'Unit Planning Summary' table with the following data:

	Outcomes (Step 1)	Methods and Measures (Step 2)	Data Collection and Analysis (Step 4)	Improvement Actions (Step 5)
✓	PO-01: Sustainable university-wide assessment process	1	0	0
✓	PO-02: Assessment training and professional development	1	0	0
✓	PO-03: External compliance	1	0	0

FIELD LEVEL HELP

If a field has Field Help associated with it, the field help icon will appear to the right of the field. Field Help will appear automatically when clicking in the field for the first time when visiting the page. If you begin typing or select a value from a drop-down, the Field Help will disappear. To view the Field Help after this, click the icon to the right of the field; it will then stay open until it is closed by clicking the hide button image in the help message bubble.

✓, X AND FLAGS ON HOME SCREEN

From the home screen view, a green ✓ indicates the outcome plan is complete OR the annual reporting is complete. A red X indicates the outcome is missing something. The deficiency is indicated by the red flag. A red flag appears when **Methods and Measures (Step 2)** is missing and when **Improvement Actions (Step 5)** is missing for outcomes that have reported assessment activity.

	Outcomes (Step 1)	Methods and Measures (Step 2)	Data Collection and Analysis (Step 4)	Improvement Actions (Step 5)
✓	PO-01: Test Outcome	1	0	0
✗	PO-02: Test Outcome	1	1	0
✓	PO-03: Test Outcome	1	1	2
✗	SLO-01: Test Outcome	0	0	0

PLANNING, CREATING & MANAGING OUTCOMES (STEPS 1-3)

All units should have a manageable number of outcomes in the unit’s assessment plan (e.g., 5-7 for degree-programs; 1-3 for non-degree programs; and 3-5 for non-academic units). All outcomes should be linked to appropriate University frameworks.

CREATE AN OUTCOME (STEP 1)

1. Navigate to unit using search field at top of screen.
2. Click on Unit Assessment in navigation on left, then click on Plan (Steps 1-3).
3. Select “Add Outcome (Step 1)” [green circle with + symbol] .

4. Enter information into the following fields:

- a. **Outcome Abbreviation:** A working title for the outcome that is visible within the main window. This must follow University naming convention by beginning with SLO or PO; followed by a dash; then a two digit number; followed by a colon and space; followed by the outcome abbreviation (Example: "SLO-01: Outcome Abbreviation").
 - o Outcome abbreviations must be unique within the unit, no duplicates.
- b. **Outcome (Step 1):** Enter the outcome statement. The outcome statement should be one sentence using proper capitalization, spelling, grammar, and punctuation. For more information about developing an outcome statement, please visit the Office of Assessment & Institutional Effectiveness (OAIE) website at <http://www.fullerton.edu/data/>.
- c. **Outcome Status:** Set outcome status to "In Use" using the drop-down menu. Do not leave blank, this field is tied to university report calculations.
- d. **Planned Assessment Years:** Select the years planned for assessment data collection using the drop-down menu. Multiple years may be selected. Field is optional.
- e. **Start Date:** Enter the current date. Field may be backdated.
- f. **Retired Date:** Leave blank.
- g. **Outcome Type:** Select "Learning Outcome" or "Performance Outcome" from drop-down menu. Do not leave blank, this field is tied to university report calculations.

5. When done, click **[Save]** and **[Return]**.

ADD METHODS AND MEASURES (STEP 2) AND CRITERIA FOR SUCCESS (STEP 3)

1. Navigate to outcome, then click to expand window to display entry panel if necessary.
2. Select "Add Methods and Measures (Step 2)" **[green circle with + symbol]**.



3. Enter information into the following fields:
 - a. **Active:** Leave this checked.
 - b. **Measure Type:** Use drop-down menu to select measure type (e.g. Both, Direct Assessment Only, or Indirect Assessment Only).
 - c. **Methods and Measures (Step 2):** Type text into box. Field should describe at least one method and one measure. For more information about selecting methods and measures, please visit the OAIE website at <http://www.fullerton.edu/data/assessment/reporting/>.

- o If using multiple measures, list the measures in the same box. Do not create a new measure.
- d. **Criteria for Success (Step 3):** Type text into box. A criterion for success should be listed for each measure described in **Methods and Measures (Step 2)** field. For more information about setting criteria for success, please visit the OAIE website at <http://www.fullerton.edu/data/>.
- e. **Notes:** Optional field.
- f. **Instruments Used:** Use the scrolling menu to select all that apply. Hold the CTRL key and click with mouse to select multiple instruments.

Training Unit > Unit Assessment > Plan (Steps 1-3) > Add Methods and Measures (Step 2)

Home Save Return

Admin Unit

Unit Assessment

Plan (Steps 1-3)

Data Collection and Analysis (Step 4)

Mapping

Reports

Documents

PO-02: Test Outcome This is our second test performance outcome.

Active

* Measure Type

* Methods and Measures (Step 2)

* Criteria for Success (Step 3)

Notes

Instruments Used

- Benchmarks/comparison with peers
- Capstone project
- Course grades

4. When done, click **[Save]** and **[Return]**.

LINKING OUTCOMES TO UNIVERSITY FRAMEWORKS

Every outcome should be linked to one University strategic plan goal (SPG). SLOs should be linked to one undergraduate or graduate learning goal (ULG/GLG). Undergraduate programs should also link SLOs to all applicable WSCUC core competencies (CC). Outcomes may also be linked to unit goals (if available).

1. Navigate to unit using search field at top of screen.
2. Click **Mapping** in navigation on left, then select **Outcomes Map** sub-tab.
3. Select framework (SPG/ULG/GLG/CC/unit goals if applicable) from drop-down menu.
4. Click into area indicating alignment between framework and Outcome to create a checkmark.

Strategic Plan Goals	Outcomes (Step 1)		
Strategic Goals	PO-01: Test Outcome This is our first test performance outcome.	PO-02: Test Outcome This is our second test performance outcome.	PO-03: Test Outcome This is our third test performance outcome.
SPG-01: Transformative Educational Experience and Environment Provide a transformative educational experience and environment for all students.		✓	
SPG-02: Student Completion and Graduation Strengthen opportunities for student completion and graduation.			
SPG-03: High quality and Diverse Faculty and Staff Recruit and retain high-quality and diverse faculty and staff.			

5. Click [**Save**] between mapping each framework and when done.
 - To remove a checkmark, click the checkmark.

REPORTING ASSESSMENT ACTIVITY (STEPS 4-5)

ADD DATA COLLECTION AND ANALYSIS (STEP 4)

1. Navigate to unit using search field at top of screen.
2. Click on Unit Assessment in navigation on left, then select Data Collection and Analyses (Step 4) sub-tab.
3. Locate outcome, then click to expand window to display entry panel if necessary.
4. Select “Add Data Collection and Analyses (Step 4)” [**green circle with + symbol**].

5. Enter information into the following fields:
 - a. **Submission Date:** This field will be auto-populated with the current date.
 - b. **Data Collection and Analyses (Step 4):** Type text into the box. This field does not accept tables or graphics. DO NOT type only “see attached”. The expectation is for this field to summarize the data collection process and assessment findings. Graphs and tables can be attached in a related document. For more information about reporting data collection and analyses, please visit the OAIE website at <http://www.fullerton.edu/data/assessment/reporting/>.
 - c. **Reporting Period:** Use the drop-down menu to select the year the data were collected (the current reporting period).

- d. **Result:** Use the drop-down menu to select “Assessed and Met” or “Assessed and Not Met”. Do not leave blank, this field is tied to university report calculations.
- e. **Outcome Type:** Select “Learning Outcome” or “Performance Outcome” from drop-down menu. This field should match the **Outcome Abbreviation** name. Do not leave blank, this field is tied to university report calculations.

- 6. When done, click **[Save]** and **[Return]**.

MOVE DATA COLLECTION AND ANALYSIS (STEP 4)

If **Data Collection and Analysis (Step 4)** was attached to the wrong method/measure, it can be moved.

- 1. From within the edit mode of the data to be moved, click the blue **[Move Data Collection and Analysis (Step 4)]** button at top of screen.

The screenshot shows the AMS User Guide interface. The breadcrumb trail at the top reads: Training Unit > Unit Assessment > Data Collection and Analysis (Step 4) > Edit Data Collection and Analysis (Step 4). On the left sidebar, the 'Unit Assessment' menu is expanded, and 'Data Collection and Analysis (Step 4)' is selected. The main content area shows a form for editing a 'PO-03: Test Outcome'. An orange arrow points to the 'Move Data Collection and Analysis (Step 4)' button. Other buttons include 'Save' and 'Return'. The form includes fields for 'Submission Date' (04/04/2019), 'Data Collection and Analysis (Step 4)' (Put some results in here.), 'Reporting Period' (2021 - 2022), and 'Result' (Assessed and Met).

2. Using the “Outcome Abbreviation” drop-down list, chose the destination outcome.
3. Using the “Data Collection and Analysis (Step 4) Relationship” drop-down menu, choose the destination “Methods and Measures”.
4. Click the blue **[Move Data Collection and Analysis (Step 4)]** button again.
5. Click **[Save]**.

ADD IMPROVEMENT ACTIONS (STEP 5)

1. Navigate to unit using search field at top of screen.
2. Click Unit Assessment in navigation on left, then select Data Collection and Analyses (Step 4) sub-tab.
3. Locate outcome, then click to expand window to display entry panel if necessary.
4. Select “Add Improvement Action (Step 5)” **[green circle with + symbol]**.

5. Enter information into the following fields:
 - a. **Submission Date:** This field will be auto-populated with the current date.
 - b. **Improvement Action (Step 5):** Type text into the box. This field does not accept tables or graphics. DO NOT type only “see attached”. Best practices include addressing improvement actions even when assessment criteria were “met”. For more information about reporting improvement actions, please visit OAIE website at <http://www.fullerton.edu/data/assessment/reporting/>.

6. When done, click [Save] and [Return].

ANNUAL ASSESSMENT REPORTING (STEP 6)

Step 6 is the annual documentation of assessment activity. The assessment process is an iterative cycle where improvement actions taken in one year are reassessed in a subsequent year, thereby closing the loop and perpetuating the continuous improvement process. Annually, all units are required to enter Data Collection and Analysis (Step 4) and Improvement Actions (Step 5) for at least one outcome. Academic units must enter their annual assessment activity by November 15th. Non-academic units must enter their annual assessment activity by July 15th. Entering the Steps 4 and 5 data into the AMS by the deadline fulfills the annual assessment reporting requirement.

ASSESSMENT MANAGEMENT CONSIDERATIONS

UPDATING OUTCOMES, METHODS AND MEASURES, AND CRITERIA FOR SUCCESS

When an outcome needs minor revisions to the **Outcome (Step 1)**, **Methods and Measures (Step 2)**, or **Criteria for Success (Step 3)** fields, edits are made to the fields to reflect the revisions. If the changes constitute major revision, the Outcome (Step 1) or the Methods and Measures (Step 2) should be retired and a new outcome or method/measure should be entered in its place. Outcomes and methods/measures which have been used should never be deleted.

RETIRING OUTCOMES (STEP 1)

An outcome should be retired when it is no longer part of the unit's assessment, will not be assessed again, or needs major revision.

1. Select unit from drop-down menu at top of screen.
2. Click Unit Assessment tab from navigation on left, then click Plan (Steps 1-3) sub-tab.
3. Locate the outcome, then click on the edit icon to the right of the outcome statement.
4. Place an "X" in front of the Outcome Abbreviation name (Example: ~~XSLO-01~~: Assessment Outcome) to indicate the outcome is retired.
5. Using the drop-down menu, change the **Outcome Status** field to "No Longer In Use".
6. Enter the **Retired Date**.
7. Click [**Save**].
 - Remaining outcomes may be renumbered at any time.

RETIRING ASSESSMENT METHODS AND MEASURES (STEP 2)

Methods and measures should be retired when it is no longer part of the unit's assessment, will not be assessed again, or needs major revision.

1. Select unit from drop-down at top of screen.
2. Click Unit Assessment tab from navigation on left, then click Plan (Steps 1-3) sub-tab.
3. Locate the outcome, then click on the edit icon to the right of the method/measure.
4. Uncheck the "Active" box.
5. Click [**Save**].
 - A method/measure that has been retired can be unretired using the "filter" function.

ACCESSING HISTORICAL ASSESSMENT REPORTS (COMPLIANCE ASSIST)

Assessment reports and attached documents from Compliance Assist can be found within the Document Repository in the “Compliance Assist Archive” folder. Files in the document repository can be linked to Methods and Measures (Step 2) and Data Collection and Analysis (Step 4) within unit assessment. Refer to “Document Repository” section for help.

AMS ADMINISTRATION

DOCUMENT REPOSITORY

There is a general document repository associated with every assessment unit. The document repository can be used to store assessment-related documents. Documents must adhere to University data security standards, which means they may not include personally identifying information. Documents can be organized into folders and sub-folders and may contain files, web links or video. Uploaded files, web links, and artifacts can be linked directly to any assessment method/measure and results. Folders and files within those folders can be shared with other units and shared externally through email to system users. All files will be read-only for the receiving units and cannot be deleted or modified.

CREATING FOLDERS IN DOCUMENT REPOSITORY

1. Select unit from drop-down at top of screen.
2. Click Documents tab from navigation on left, then click Document Repository sub-tab.
3. Click small arrow icon to right of unit name, then click [**Add Folder**].
4. Type folder name.

Save Cancel

Add Folder
* **Name**

5. Click [**Save**].

OTHER FOLDER ACTIONS

- To delete a folder, click the small arrow icon to the right of the folder name, then click “Delete”.
- To rename a folder, click the small arrow icon to the right of the folder name, then click “>_Rename”. Then modify the name and click [**Save**].
- To share a folder, click the small arrow icon to the right of the folder name, then click “Share”. Then select the unit(s) to share with and click [**Save**].
- To create a sub-folder, click the small arrow icon to the right of the folder name, then click “Add Folder”. Then enter the folder name and click [**Save**].

UPLOADING FILES TO DOCUMENT REPOSITORY

1. Select unit from drop-down at top of screen.
2. Click Documents tab from navigation on left, then click Document Repository sub-tab.
3. Click the **[green plus sign icon]** on the top of right of the Document Repository.
4. Select folder from the drop-down menu.

Places documents into: General

Files

Click to browse for files

* Required field

* Name	* Url	Description
...

5. To upload a file, click the files area. Navigate to file and select file. The auto-populated name can be changed and an optional description added.
6. For web links, enter the name, URL, and description.
7. Click **[Save]**.

OTHER FILE ACTIONS

1. To delete a document, click the small arrow icon to the right of the document name, then click **[Delete]**.

ATTACHING RELATED DOCUMENTS TO METHODS AND MEASURES (STEP 2)

1. Select unit from drop-down at top of screen.
2. Click Unit Assessment tab from navigation on left, then click Plan (Steps 1-3) sub-tab.
3. Locate the outcome and methods and measures, then click the **[green wrench icon]** to the right of “Related Documents”.
4. Locate the file from the “Document Repository” on left, then drag and drop to the “Related Documents” on right.
 - If the file has not already been uploaded to the “Document Repository” click the **[green plus icon]** to add.
 - To un-relate a document, click the **[broken link icon]** to the right of the document.

ATTACHING RELATED DOCUMENTS TO DATA COLLECTION AND ANALYSIS (STEP 4)

1. Select unit from drop-down at top of screen.
2. Click Unit Assessment tab from navigation on left, then click Data Collection and Analyses (Step 4) sub-tab.
3. Locate the outcome, methods/measures, and results, then click the **[green wrench icon]** to the right of “Related Documents”.

4. Locate the file from the “Document Repository” on left, then drag and drop to the “Related Documents” on right.
 - If the file has not already been uploaded to the “Document Repository” click the **[green plus icon]** to add.
 - To un-relate a document, click the **[broken link icon]** to the right of the document.

RUNNING STANDARD REPORTS

There are two standard reports available: 1) Annual Assessment Report (landscape), and 2) Unit Assessment Report (portrait). Reports can be output to PDF and WORD documents.

1. Select unit from drop-down at top of screen.
2. Click Reports tab from navigation on left, then click Standard Reports sub-tab.
3. Customize report fields and filters as desired.

4. Click **[Open Report]**.
 - Report settings cannot be saved in Standard Reports. Customized reports can be saved in “Ad Hoc Reports”.

RUNNING AD HOC REPORTS

Creating ad hoc reports is beyond the scope of this guide. Please contact OAIE for assistance.

USING FILTERS AND SORTING OUTCOMES

FILTERS

The blue filter icon at the top of the navigation on the left filters the data that displays on all pages.

The screenshot shows the AMS user interface with the filter settings panel open. The panel is titled "Filter Settings" and contains three sections: "Filter Settings", "Goal Filters", and "Outcome (Step 1) Filters". Each section has a "Match any or all filters" dropdown set to "ALL" and a "Clear Filters" button. The "Goal Filters" section includes a "Goal Numbers" input field and a "Show Inactive Goals" dropdown set to "NO". The "Outcome (Step 1) Filters" section includes an "Outcome Status" input field and a "Planned Assessment Years" input field. The "Methods and Measures (Step 2) Filters" section includes a "Measure Type" input field and a "Show Inactive Methods and Measures (Step 2)" dropdown set to "YES". A message at the bottom of the panel states "Sorting disabled while filter is active."

By default, the system hides retired outcomes and inactive methods and measures. Use the filter settings to alter data displayed. When a filter is set, a red halo appears around the blue filter icon.

- To remove a filter, click the **[Clear Filters]** button.
- To close the filter page, click the **[X]** in the top right corner.

SORTING OUTCOMES

The sort order of outcomes can be rearranged.

1. Select unit from drop-down at top of screen.
2. Click Unit Assessment tab from navigation on left, then click Plan (Steps 1-3) sub-tab.
3. Expand the **Outcomes (Step 1)** field if necessary to display all outcomes.
4. Drag and drop outcomes to desired order.

ACTIVITY LOG

The activity log is available on all pages with add, edit, or copy icons. The activity log displays all activity performed in the unit.

1. Click the **[activity log icon]** at top of navigation on left.
2. Use the drop-down menu to choose the amount of activity to display.
 - To close the activity log, click the **[X]** in the top right corner of the form.

Training Unit > Unit Assessment > Plan (Steps 1-3)

Show activity from the

Date	Personnel	Type	Object	Name/Text
04/18/2019	Jyenny Babcock	Edit	Outcome (Step 1)	SLO-01: Test Outcome
04/18/2019	Jyenny Babcock	Edit	Outcome (Step 1)	PO-03: Test Outcome
04/18/2019	Jyenny Babcock	Edit	Outcome (Step 1)	PO-02: Test Outcome

- Clicking the “Edit” link will display changes made.

Activity Details (Edit)

Date: 04/18/2019
 Personnel: Jyenny Babcock
 Outcome (Step 1): SLO-01: Test Outcome

	Old Value	New Value
Outcome (Step 1)	This is a test outcome statement that should have its definition to be used as an example. Should be written with correct spelling, punctuation, capitalization, and grammar. Treat this like it is public facing.	This outcome should be written with correct spelling, punctuation, capitalization, and grammar.
Start Date	04/04/2019	04/01/2019

OK