Assessment Management System (AMS)

USER GUIDE

CALIFORNIA STATE UNIVERSITY
FULLERTON™

Office of Assessment and Institutional Effectiveness

data@fullerton.edu

Revision date: 07/07/20

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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. <u>Admin Unit</u>

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.

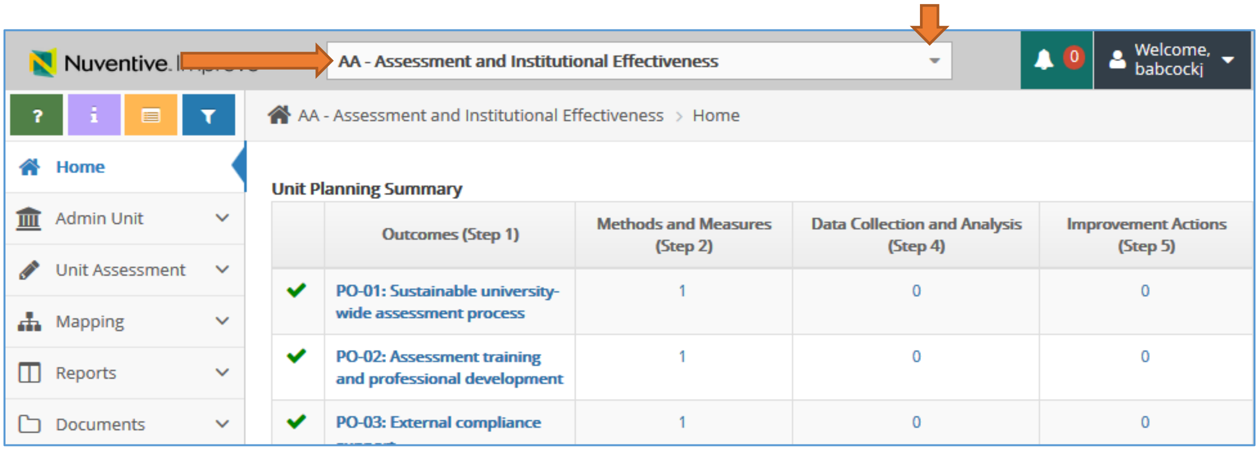
AMS ACCESS REQUEST FORM

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, <u>OR</u> 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.

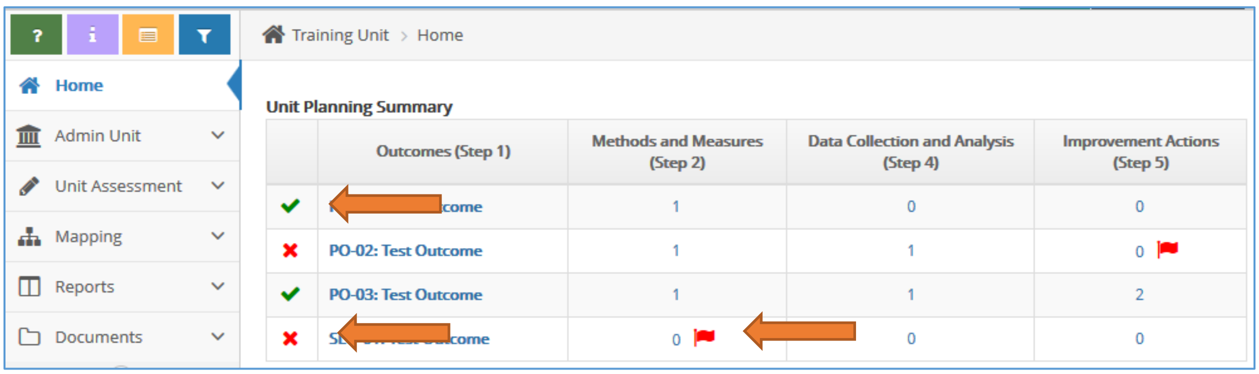


FIELD LEVEL HELP

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.

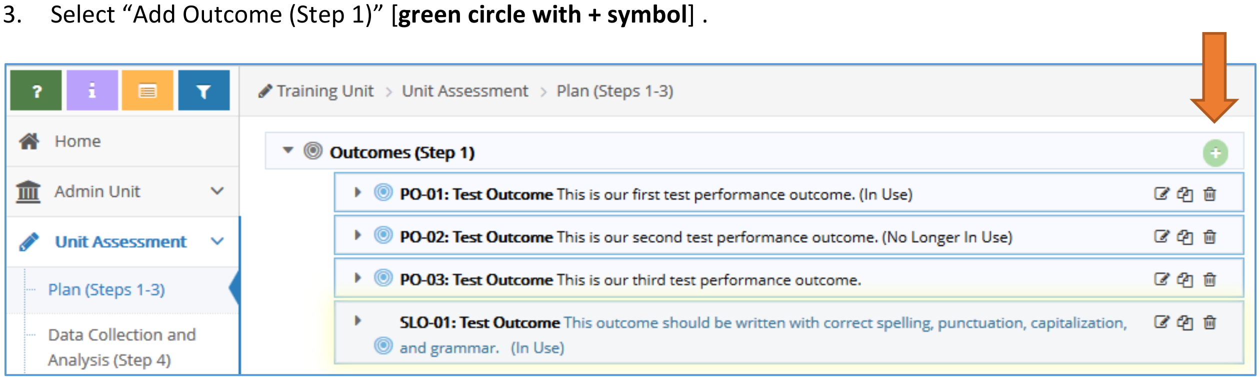


PLANNING, CREATING & MANAGING OUTCOMES (STEPS 1-3)

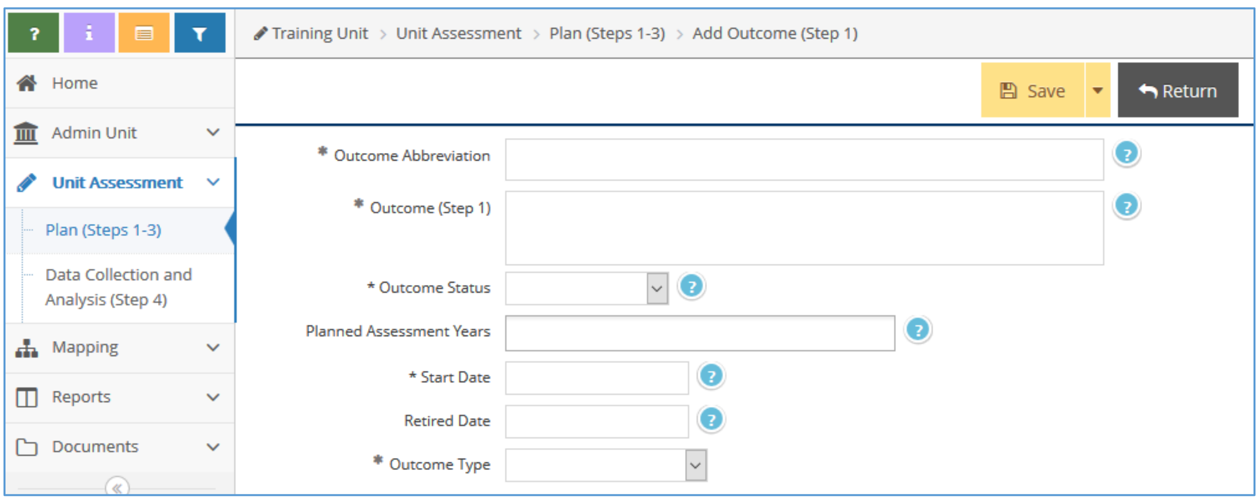
All units should have a manageable number of outcomes in the unit's assessment plan (e.g., 5-7 for degree-programs; 1-3 for non-degree programs; and 3-5 for non-academic units). All outcomes should be linked to appropriate University frameworks.

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*").
        - 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**].

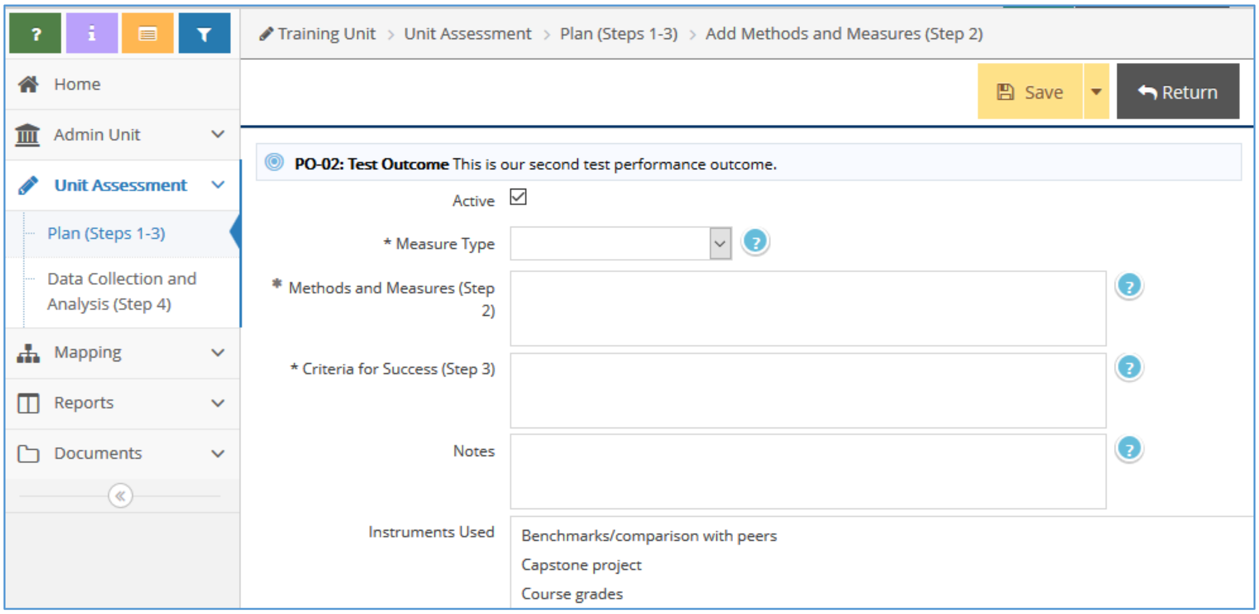
3. Enter information into the following fields:
    a. **Active:** Leave this checked.
    b. **Measure Type**: Use drop-down menu to select measure type (e.g. Both, Direct Assessment Only, or Indirect Assessment Only).

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/.
   - 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.

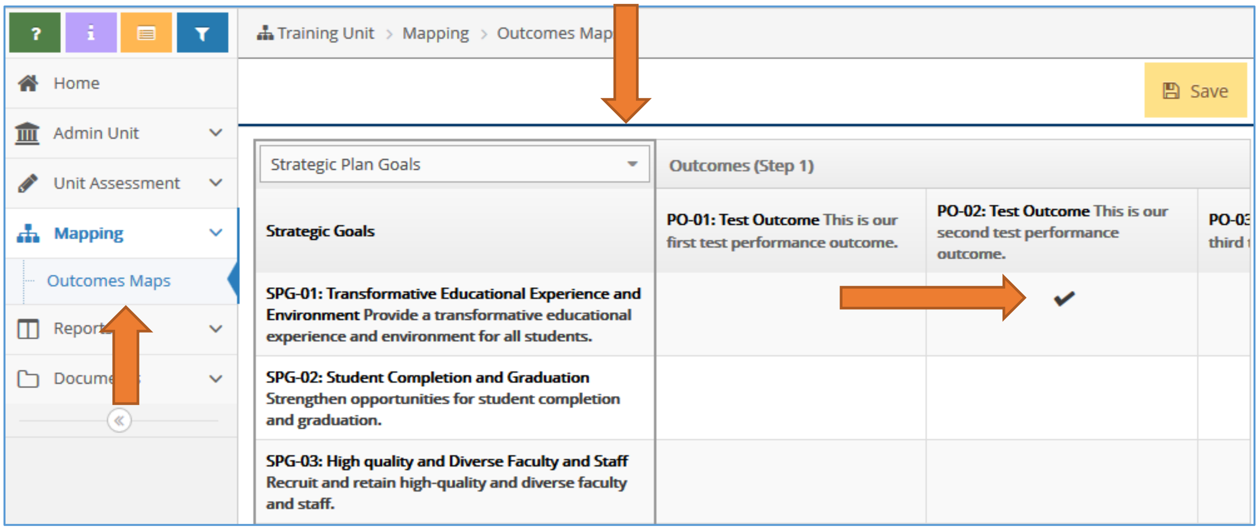


4. When done, click [**Save**] and [**Return**].

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 <u>Mapping</u> in navigation on left, then select <u>Outcomes Map</u> 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.

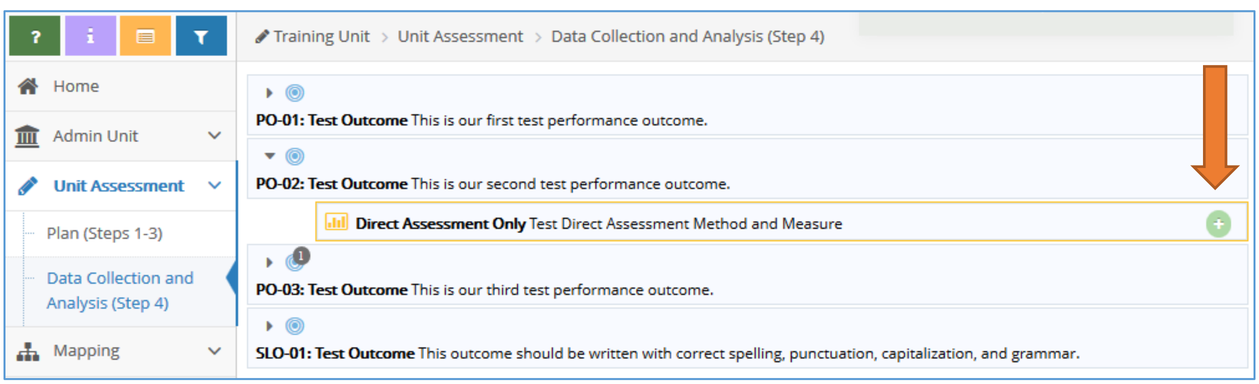


5. Click [**Save**] between mapping each framework and when done.
   - To remove a checkmark, click the checkmark.

REPORTING ASSESSMENT ACTIVITY (STEPS 4-5)

ADD DATA COLLECTION AND ANALYSIS (STEP 4)

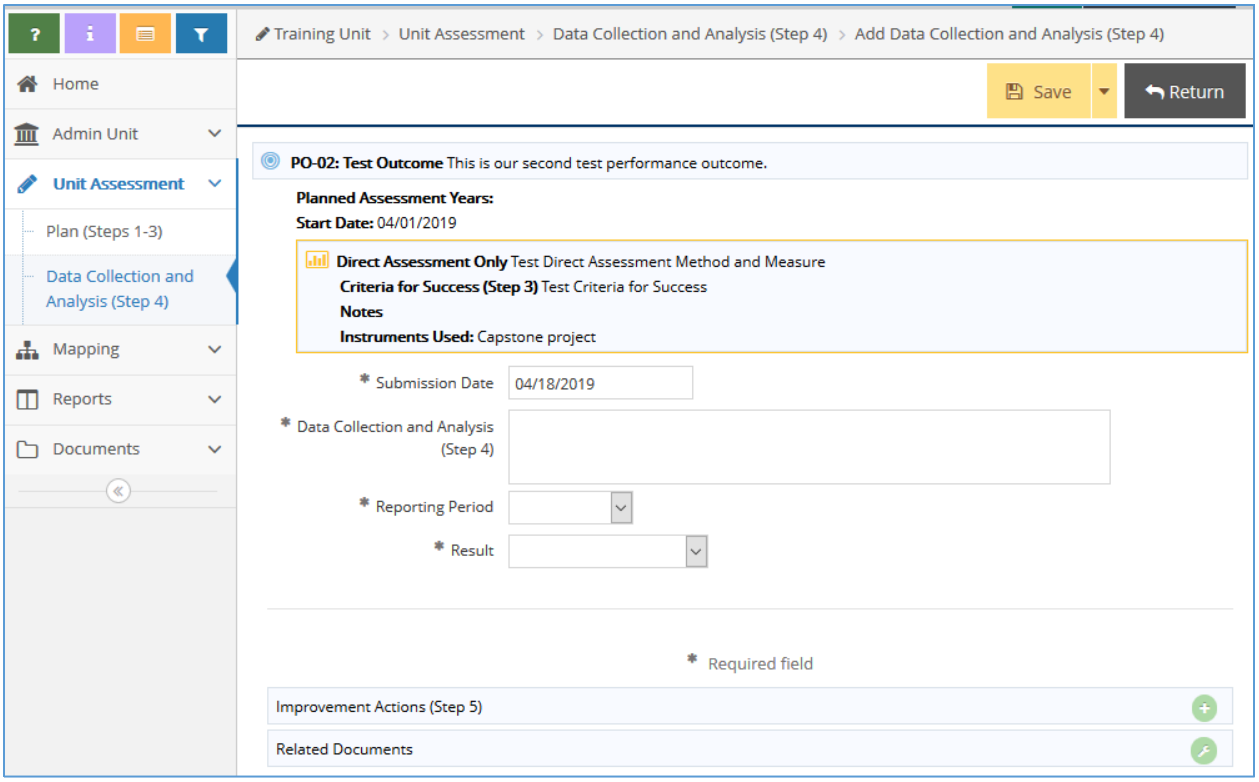
1. Navigate to unit using search field at top of screen.
2. Click on Unit Assessment in navigation on left, then select Data Collection and Analyses (Step 4) sub-tab.
3. Locate outcome, then click to expand window to display entry panel if necessary.
4. Select "Add Data Collection and Analyses (Step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

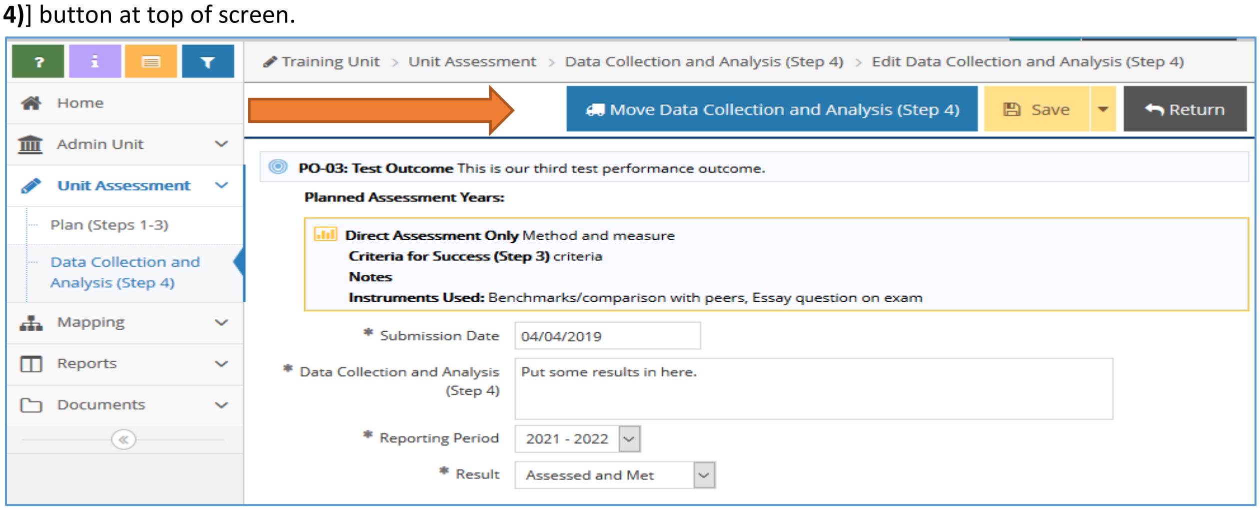


6. When done, click [**Save**] and [**Return**].

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.

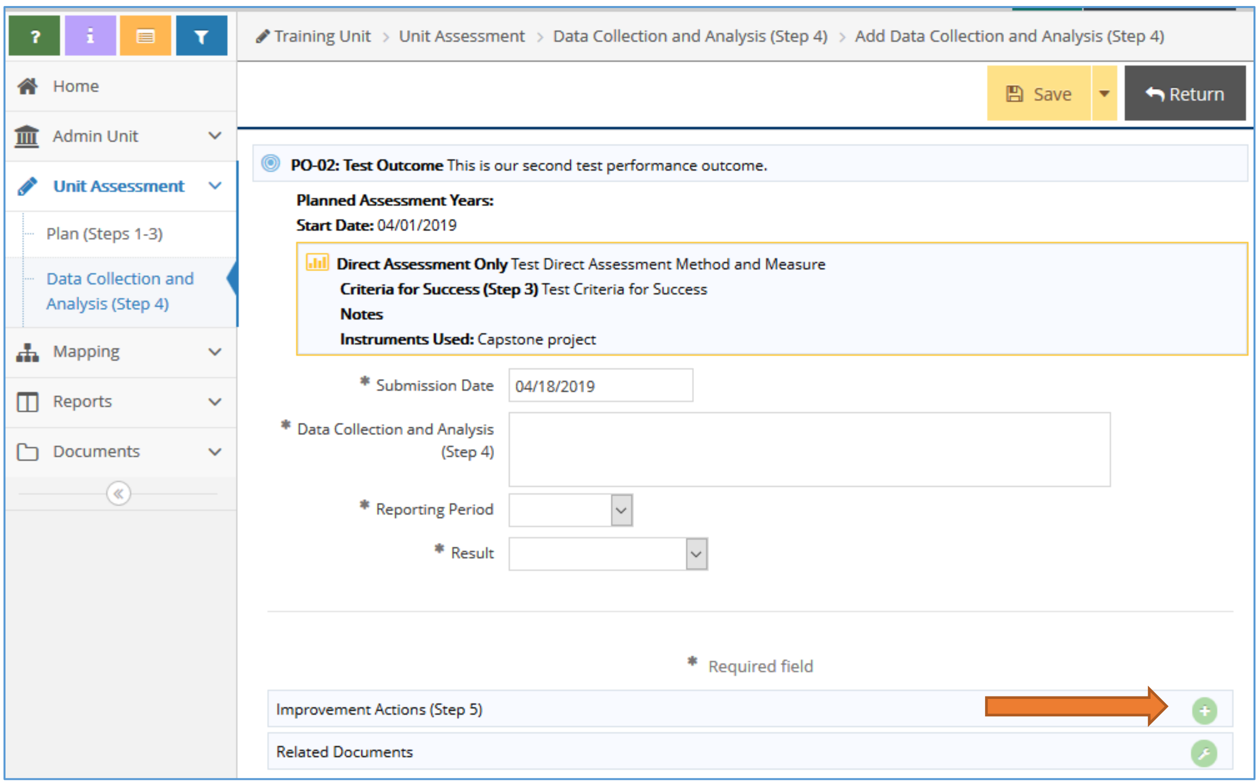
1. From within the edit mode of the data to be moved, click the blue [**Move Data Collection and Analysis (Step 4)**] button at top of screen.



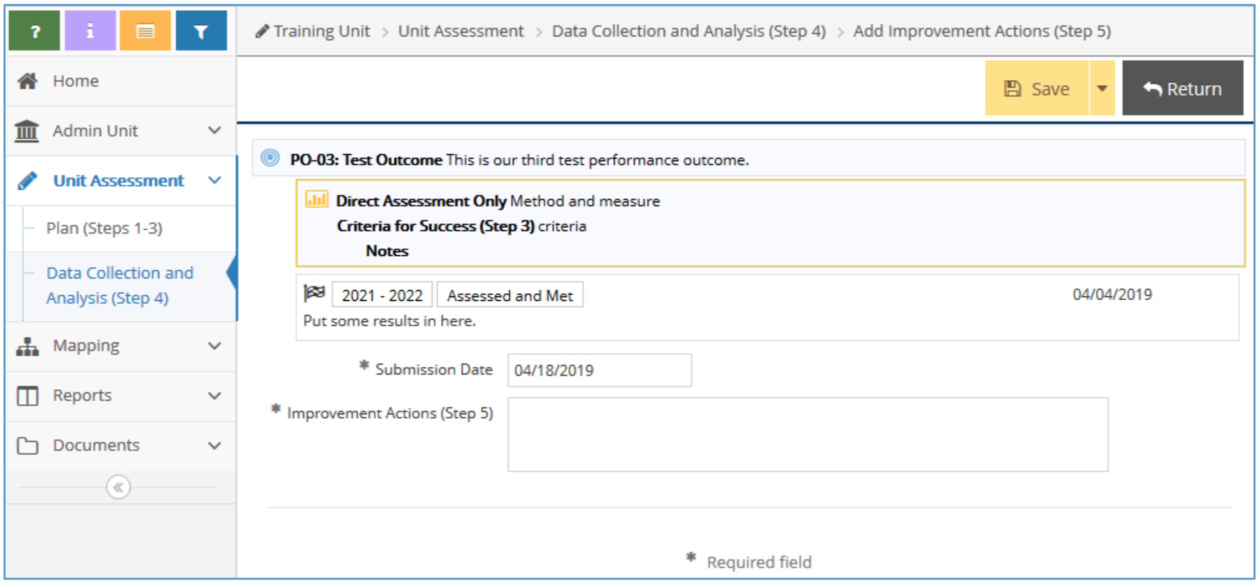
2. Using the “Outcome Abbreviation” drop-down list, chose the destination outcome.
3. Using the “Data Collection and Analysis (Step 4) Relationship” drop-down menu, choose the destination “Methods and Measures”.
4. Click the blue [**Move Data Collection and Analysis (Step 4)**] button again.
5. Click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

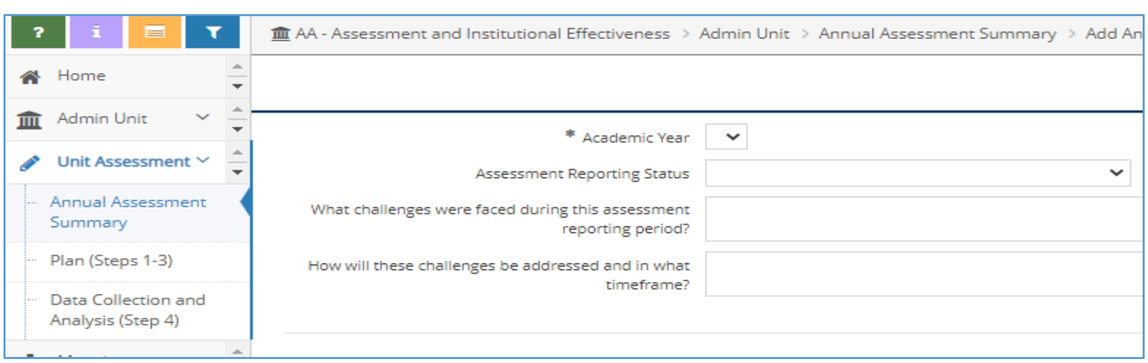
ANNUAL ASSESSMENT REPORTING (STEP 6)

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 reporting deadline fulfills the annual assessment reporting requirement.

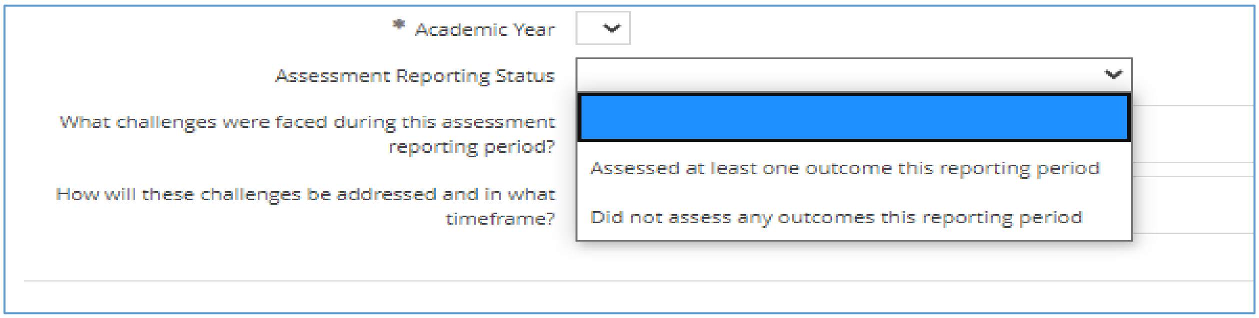
When a unit is unable to assess for at least one outcome, or does not have at least one outcome entered into AMS, completion of the "Annual Assessment Summary" is **mandatory**.

ANNUAL ASSESSMENT SUMMARY

1. Select unit from drop-down menu at top of screen.
2. Click Unit Assessment tab from navigation on left, then click Annual Assessment Summary sub-tab.
3. Click the [**green circle with + symbol**] to add a new entry
4. Select the Academic Year from the drop-down.



5. Select the “Assessment Reporting Status” from the dropdown. **NOTE:** Completing the summary is optional if a unit has assessed at least one outcome during the reporting period, however, a unit may choose to complete the form as a means of documenting information deemed valuable to the next reporting cycle.
6. Enter a description of the challenges faced that impacted assessment reporting during the reporting cycle, as well as plans to address those challenges.
7. Click [**Save**].



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.

8. Select unit from drop-down menu at top of screen.
9. Click Unit Assessment tab from navigation on left, then click Plan (Steps 1-3) sub-tab.
10. Locate the outcome, then click on the edit icon to the right of the outcome statement.
11. Place an “X” in front of the Outcome Abbreviation name (Example: ***X***SLO-01: Assessment Outcome) to indicate the outcome is retired.
12. Using the drop-down menu, change the **Outcome Status** field to “No Longer In Use”.
13. Enter the **Retired Date**.
14. 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.

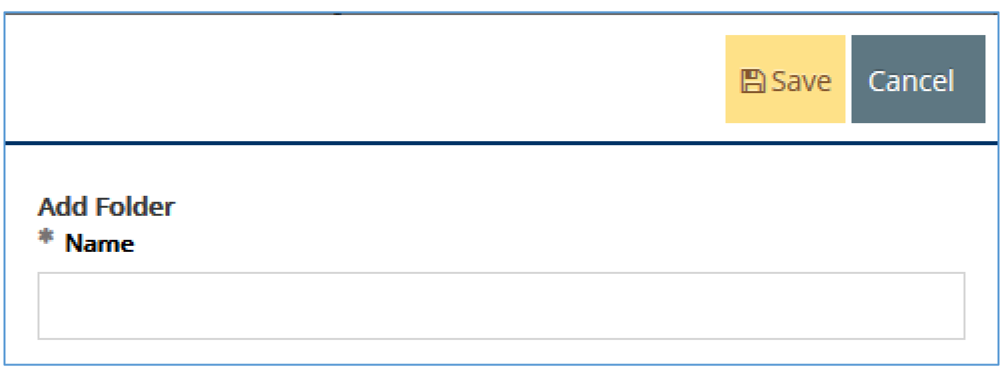
AMS ADMINISTRATION

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.



5. Click [**Save**].

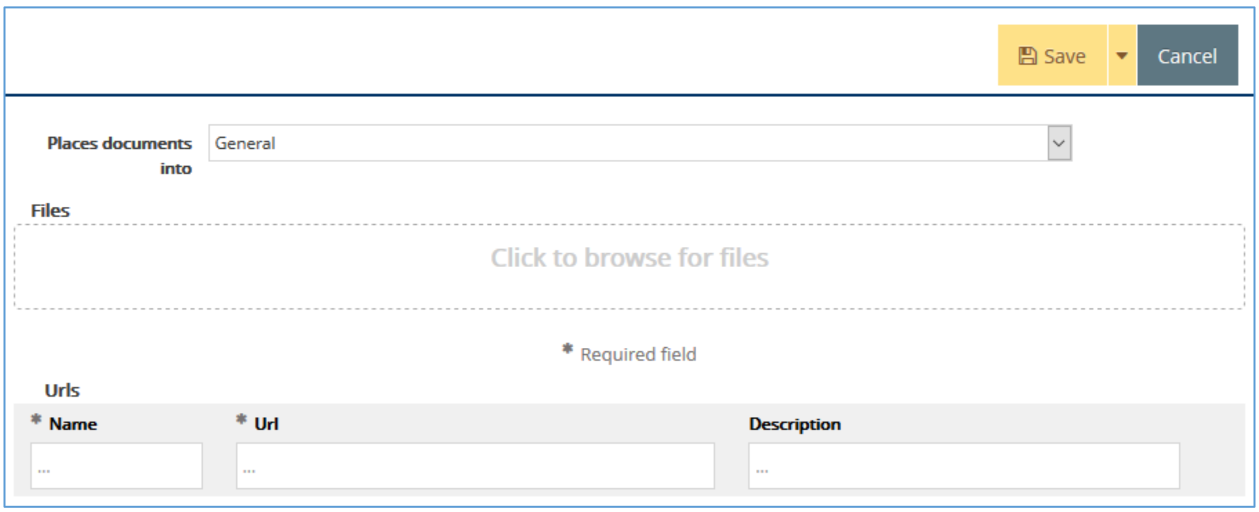
OTHER FOLDER ACTIONS

- 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.



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.

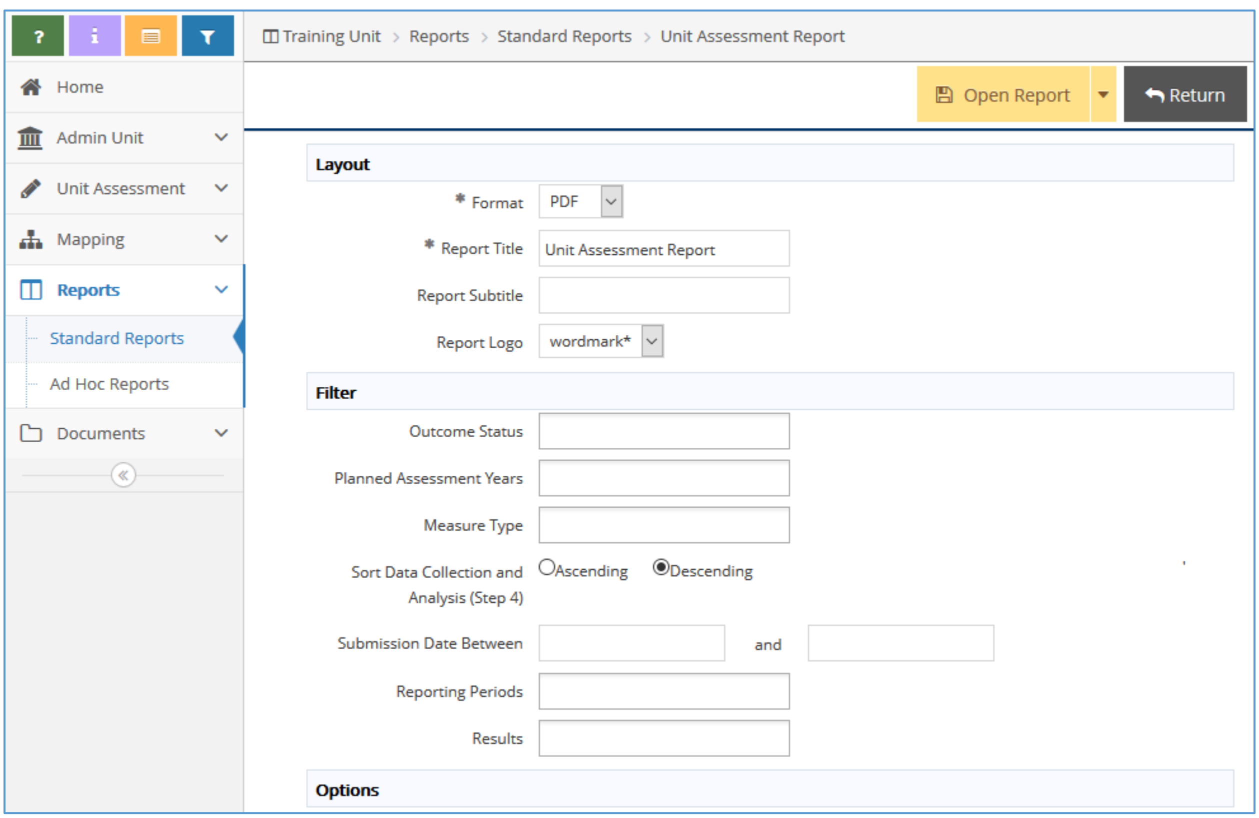
ATTACHING RELATED DOCUMENTS TO DATA COLLECTION AND ANALYSIS (STEP 4)

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.

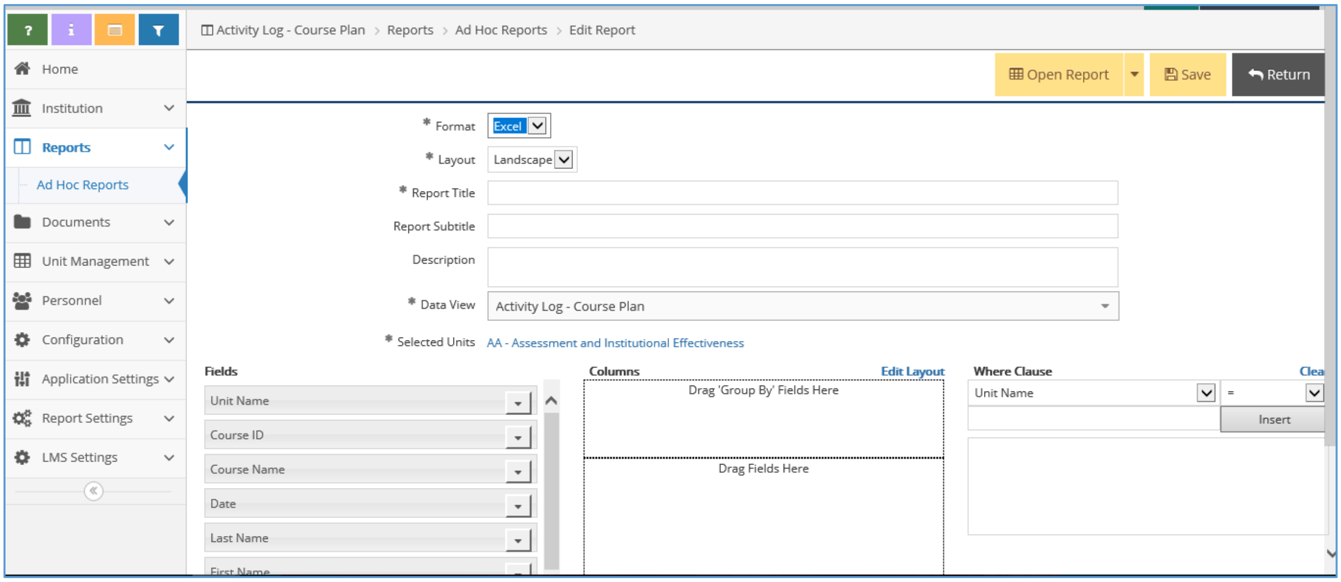
1. Select unit from drop-down at top of screen.
2. Click Reports tab from navigation on left, then click Standard Reports sub-tab.
3. Customize report fields and filters as desired.



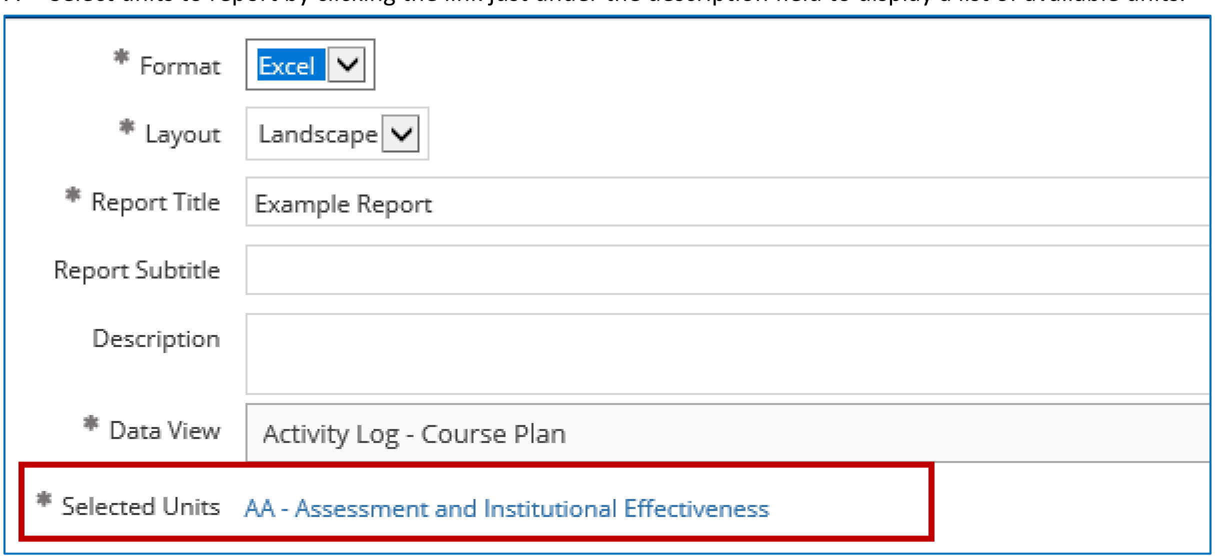
4. Click [**Open Report**].
   - Report settings cannot be saved in Standard Reports. Customized reports can be saved in "Ad Hoc Reports" (next section).

RUNNING AD-HOC REPORTS FOR REPORTING SUMMARY UNITS

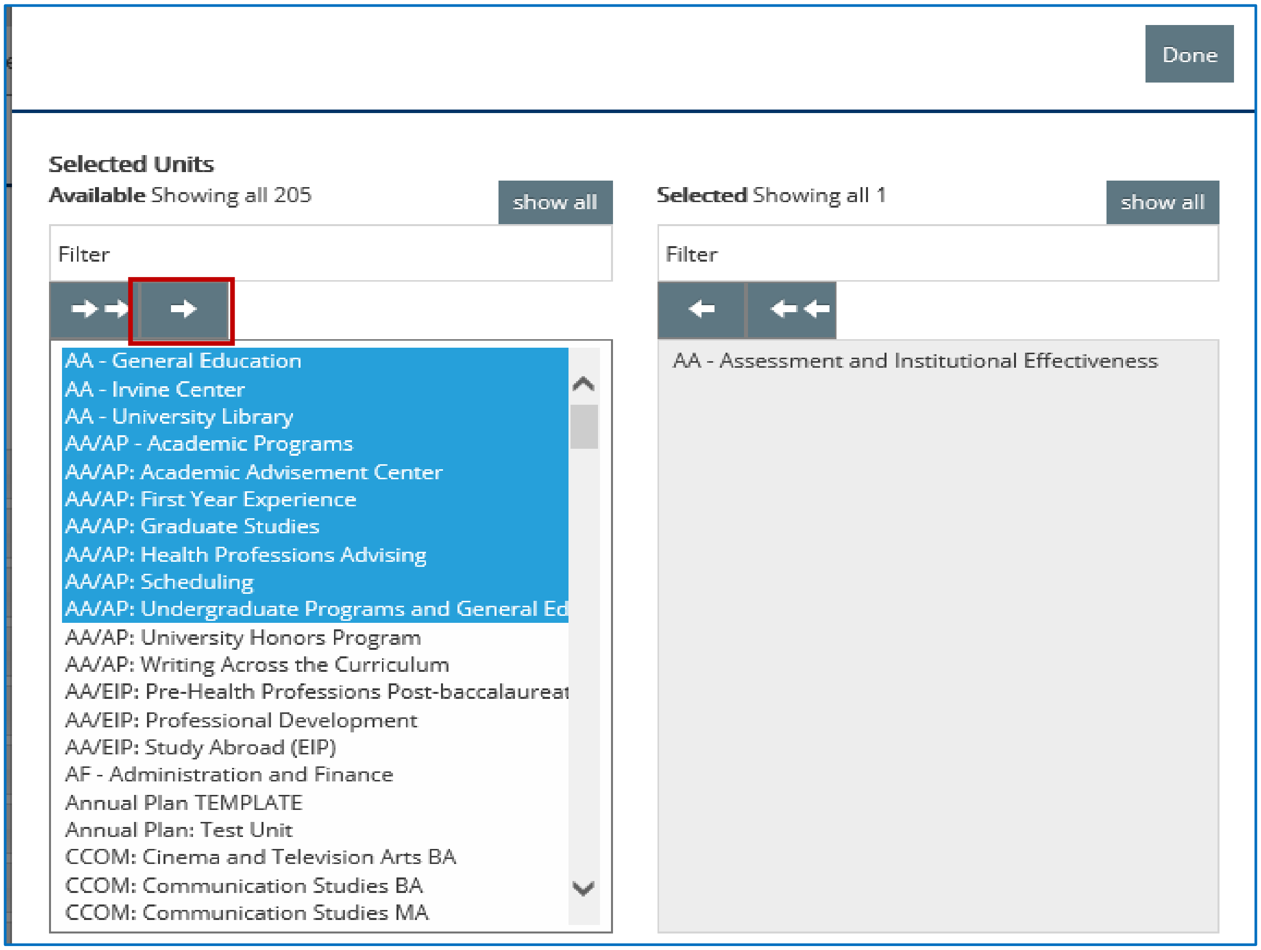
1. Select unit from drop-down at top of screen.
2. Click <u>Reports</u> tab from navigation on left, then click <u>Ad-Hoc</u> sub-tab.
3. Click the green plus sign icon.



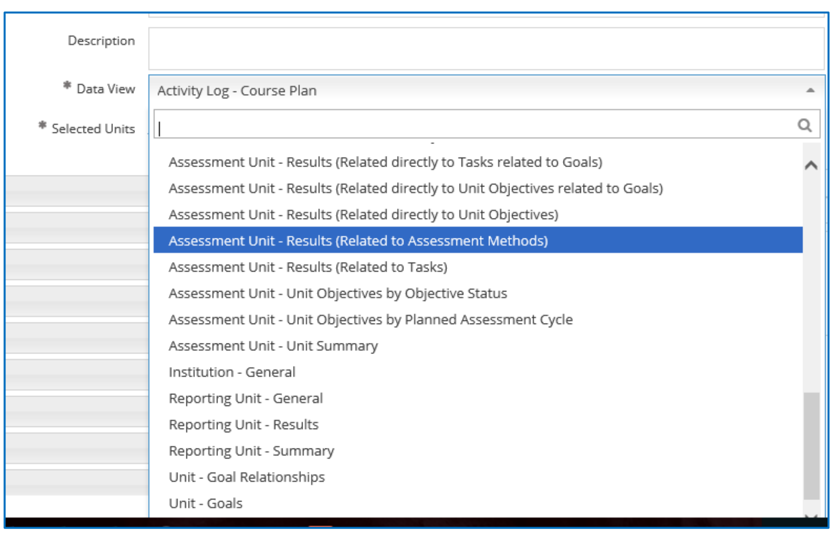
4. Select the desired format from the drop down (Use PDF for reports that do not require formatting edits, Excel for producing a data set with filtering and sorting capabilities, or Word for reports that require formatting edits).
5. Select the desired layout from the drop down (Landscape is the default option).
6. Enter a title for the report (subtitle and description are optional).
7. Select units to report by clicking the link just under the description field to display a list of available units.



8. To return data for multiple units, select units from the left table and move to the right (using arrow icons). Then click 'Done'.

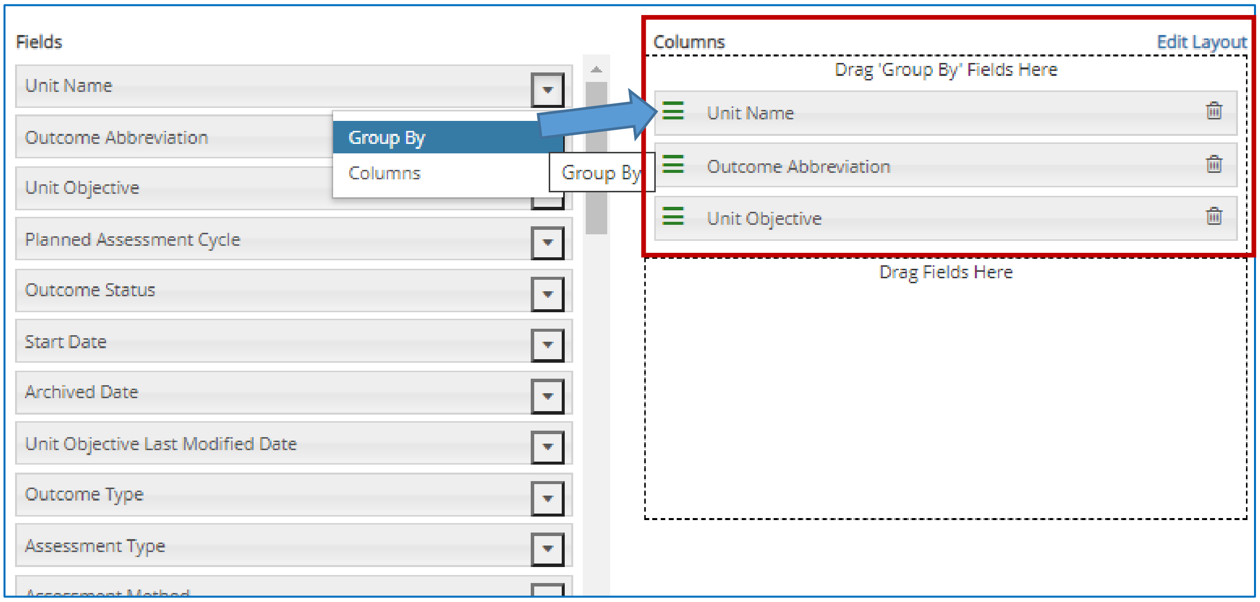


9. Select the desired data view from the drop down. Data views mainly represent the data behind the different navigation tabs within the AMS. **NOTE**: "*Assessment Unit – Results (Related to Assessment Method)*" is the predominantly used data view for CSUF ad-hoc reports. Not all data views are activated, therefore, when selecting other data views, your report may not yield results.

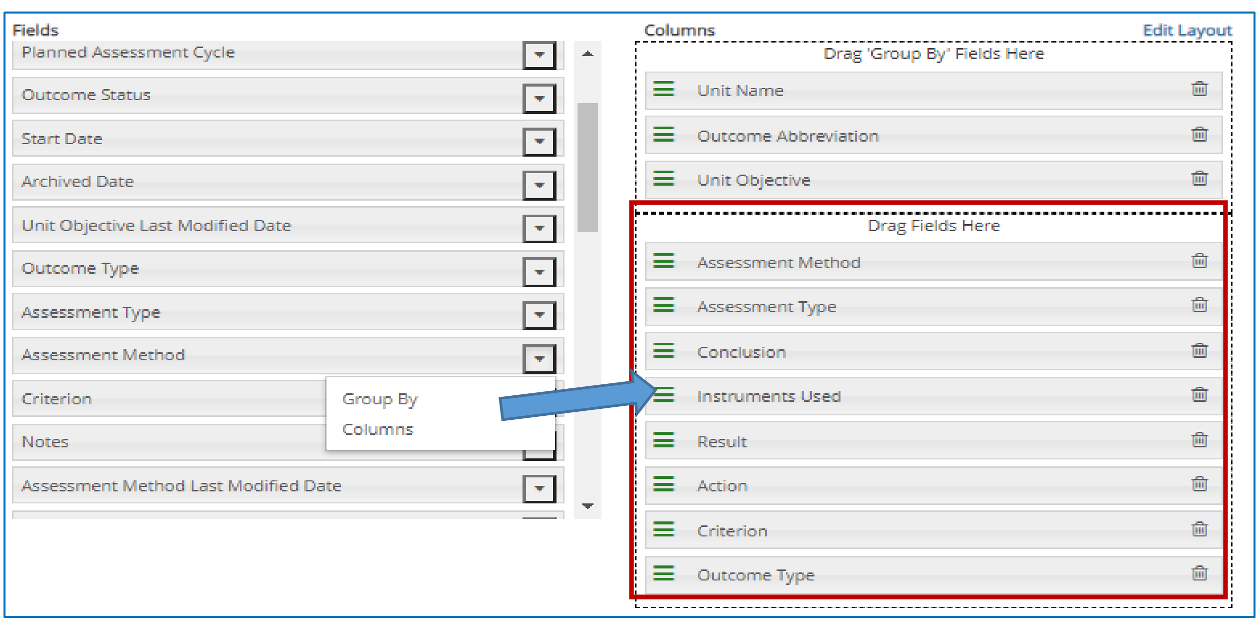


Select the fields for which you want to group your data. Use the "Group By" fields if you are running an ad-hoc report on multiple assessment units and want data grouped without repeating fields when applicable. **NOTE**: See Table 1 below for a list of commonly used fields and their equivalent fields in assessment reporting Steps 1-5.

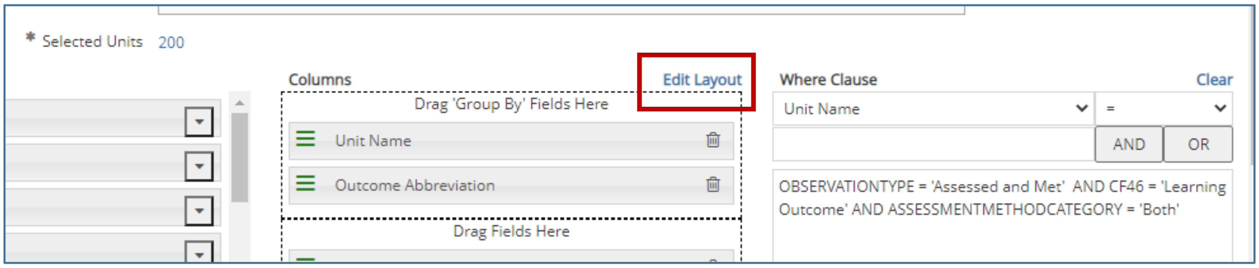
a. Drag and drop (or click the arrow to the right of the field) from the Fields table to the "drag 'group by' field here" area at the top of the Columns table.
b. Use the trash can icon to remove fields.



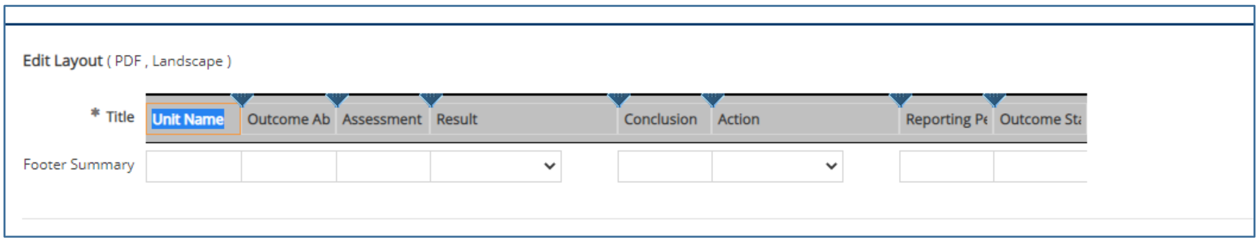
10. Select the Column fields from which you want to pull your data. **NOTE**: See Table 1 below for a list of commonly used fields and their equivalent fields in assessment report Steps 1-5.
    a. Drag and drop (or click the arrow to the right of the field) from the Fields table to the "drag fields here" area at the bottom of the Columns table.
    b. Use the trash can icon to remove fields.



11. Click “Edit Layout” to make changes to the column titles of report.

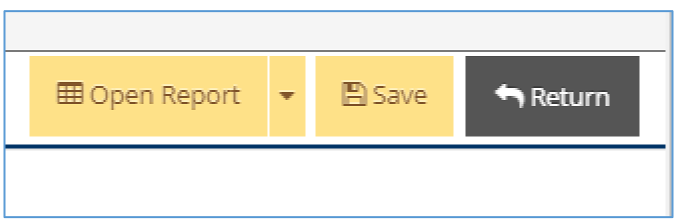


a. Click on any column title to edit the field name.
b. Re-order or adjust column widths as applicable, then click “Done”.

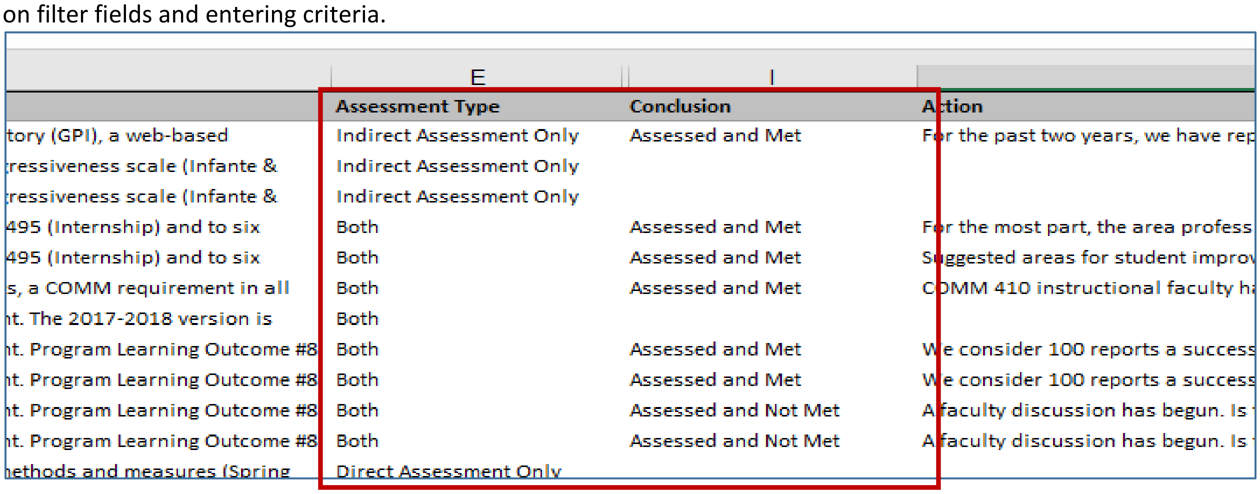


TIP: Before moving on to the next steps, run your report, which will provide you with important information on filter criteria.

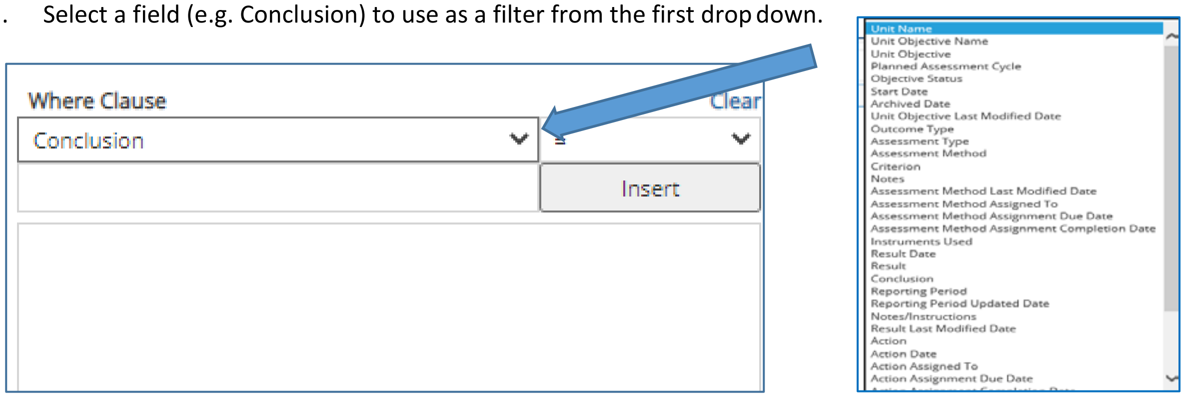
a. Click “Save”
b. Click “Open Report”



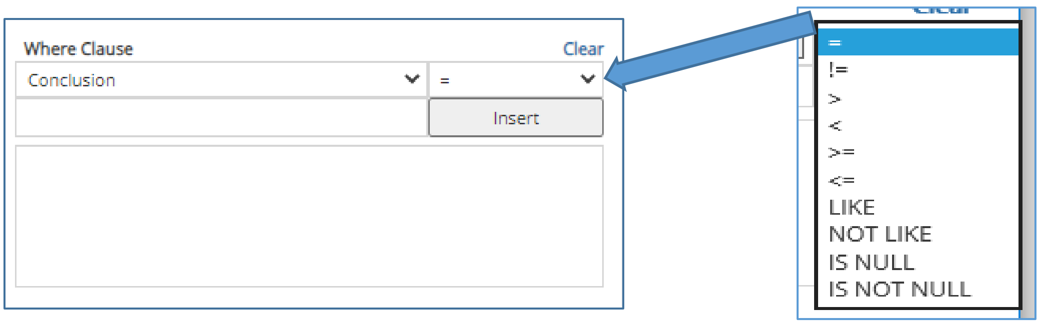
In the example excel report (below), column fields, “Assessment Type”, and “Conclusion” yielded specific results that correspond directly to assessment report fields, which may be used as filter parameters. See the next steps on filter fields and entering criteria.



12. Filter results by using far right table.
    a. Select a field (e.g. Conclusion) to use as a filter from the first drop down.

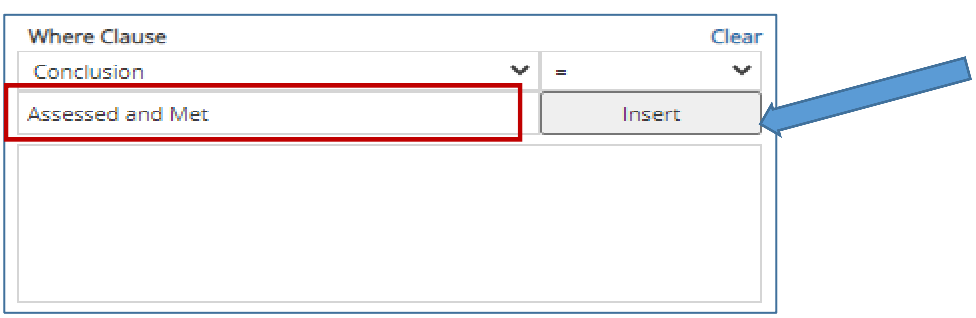


    b. Select the type of filter (e.g. =) to use from the second drop down.

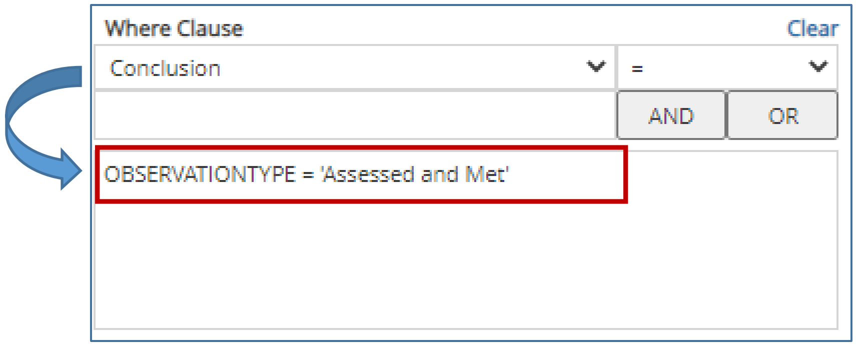


    c. Type in the filter criteria. NOTE: Filter criteria must be typed exactly as it corresponds to the field. For example, in the sample report above, it was noted that “Conclusion” yielded results to include, ‘Assessed and Met’, and ‘Assessed and Not Met’. To filter your report and return results only for outcomes that were ‘Assessed and Met’, type in the filter criteria exactly as written. See Table 1 below for additional fields designated with an * that must be entered exactly as written.

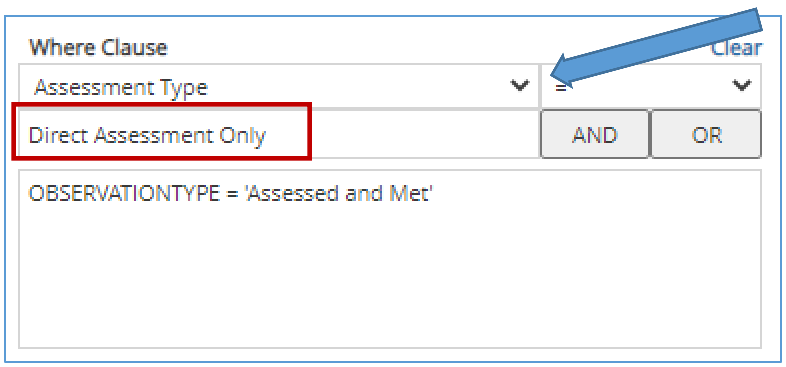
    d. Click ‘Insert’ to populate the syntax along with your filter criteria.



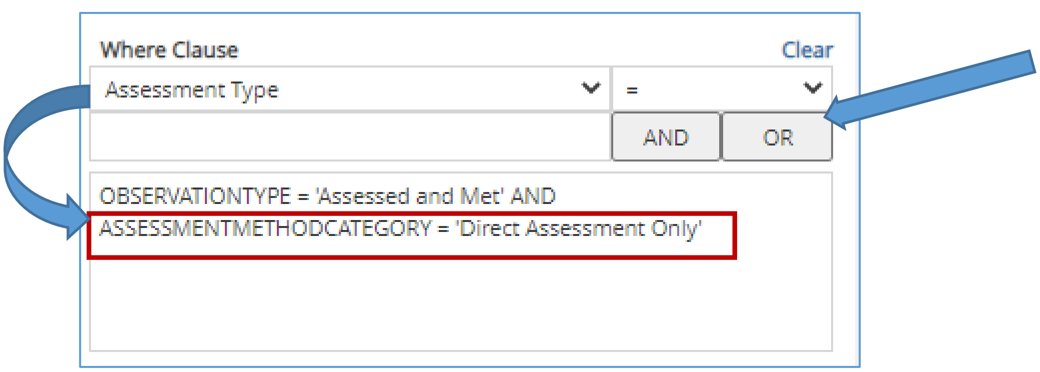
NOTE: The field name may change when syntax is inserted. For example (below), the "Conclusion" field was selected, which changed to "OBSERVATIONTYPE =" when syntax was inserted, and is followed with the criteria entered, 'Assessed and Met'.



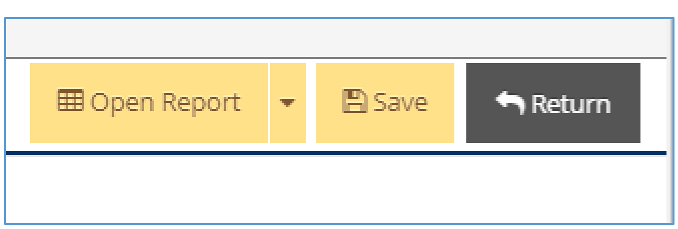
13. Use Boolean Operators to combine more than one filter.
    a. Select an additional field from the dropdown (e.g. Assessment Type).
    b. Type in the filter criteria that corresponds to the new field (e.g. Direct Assessment Only).



    c. Click on the applicable Boolean Operator (e.g. And) to insert the syntax along with your filter criteria.



    d. Click "Save" and "Open Report" to run.



The report returns results based on the combined filter criteria entered.

D	E	F	G
Assessment Method	**Assessment Type**	**Conclusion**	**Action**
OAIE will introduce and	Direct Assessment Only	Assessed and Met	OAIE will continue to provide
OAIE will respond to all	Direct Assessment Only	Assessed and Met	OAIE will continue to provide
OAIE will lead, participate in,	Direct Assessment Only	Assessed and Met	OAIE will continue to provide
Monitor and provide feedback	Direct Assessment Only	Assessed and Met	No improvement suggestions
Disseminate assessment, PPR	Direct Assessment Only	Assessed and Met	OAIE will continue to submit
Conduct monthly ATI scans of	Direct Assessment Only	Assessed and Met	Continue to do ATI scans for a
1) Newsletters: Track how many	Direct Assessment Only	Assessed and Met	1. Increase the frequency of
1) Newsletters: Track how many	Direct Assessment Only	Assessed and Met	1. Increase the frequency of

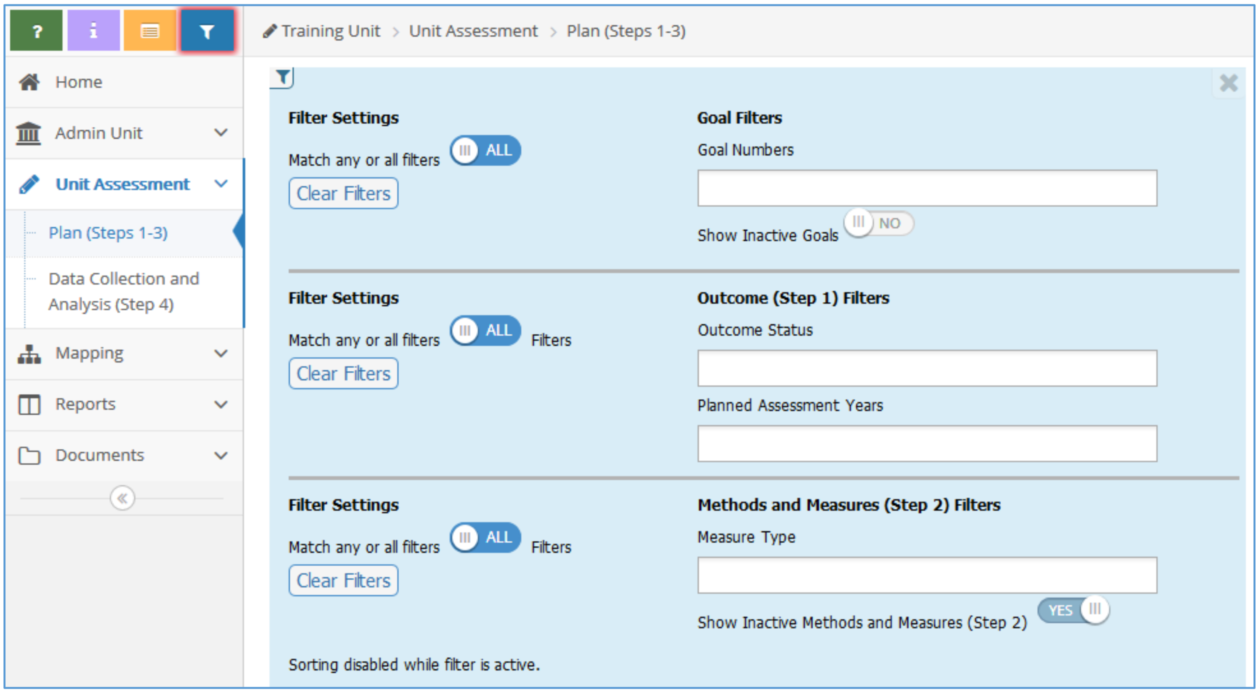
Table. 1

Field	Steps 1-3 equivalent
Unit Name	e.g. AA – Assessment and Institutional Effectiveness
Outcome Abbreviation	e.g. SLO-01: SA Global Perspective
Unit Objective	Outcome statement, e.g., *"Students understand, respect, and appreciate cultural differences".*
Outcome Type*	Learning Outcome, Performance Outcome
Assessment Method	Outcome methods and measures as entered into Step 2, e.g. "*This outcome is measured by having all students complete the Verbal Aggressiveness scale".*
Assessment Type*	Direct Assessment Only, Indirect Assessment Only, Both
Instruments Used*	e.g. Course grades, In-class discussions, Portfolio evaluation of student work, Research paper/project, Student Self-assessment, Other
Criterion	e.g., *"70% of the class score 70% or higher on final exam".*
	Steps 4-5 equivalent
Result	Data collection and analysis e.g., *"After scoring each component on a 1-100 percentage scale, the average score for this outcome came to 85%, with the lowest scores in the Social Media section (25%) and the Newsletter section (50%). All other components received a score of 100%".*
Conclusion*	Assessed and Met, Assessed and Not Met
Action	Improvement Actions based on analysis, e.g. "Exit survey will be modified to align more closely with outcome".
Related Goal Type*	ULGs, GLGs, and SPGs that are mapped to the outcome, e.g. ULG-06: Global Community, GLG-06: Global Community, etc.
Reporting Period*	e.g. 2018-2019, 2019-2020, etc.
Outcome Status*	In Use, No Longer In Use

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.



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.

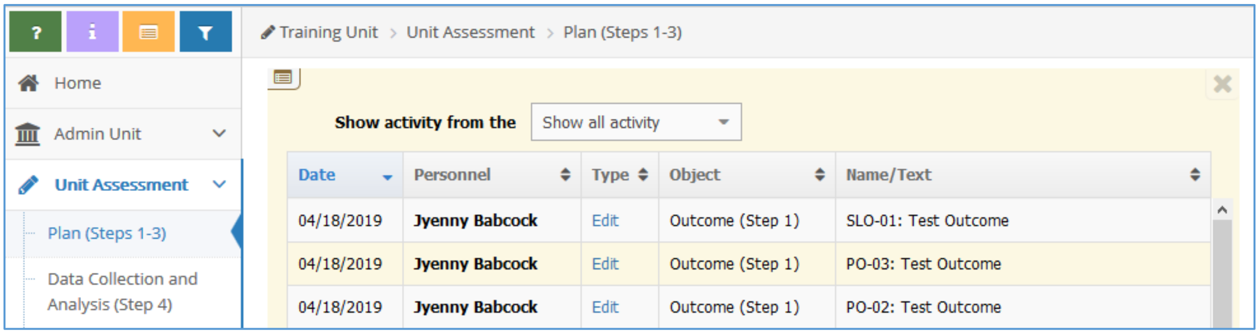
1. Select unit from drop-down at top of screen.
2. Click Unit Assessment tab from navigation on left, then click Plan (Steps 1-3) sub-tab.
3. Expand the **Outcomes (Step 1)** field if necessary to display all outcomes.
4. Drag and drop outcomes to desired order.

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.



- Clicking the "Edit" link will display changes made.