

Assessment Management System (AMS)

USER GUIDE



CALIFORNIA STATE UNIVERSITY
FULLERTON™

Office of Assessment and Institutional Effectiveness

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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.

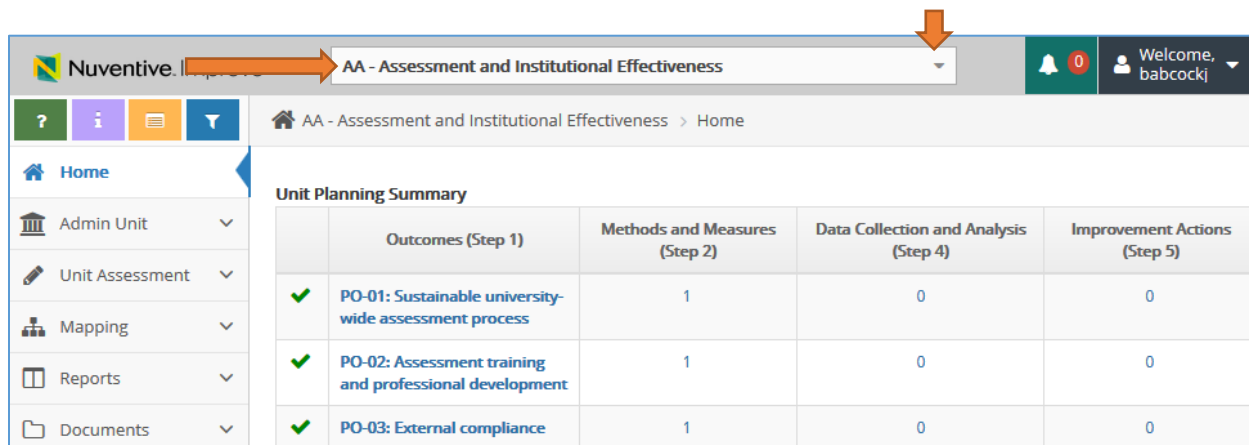
AMS ACCESS REQUEST FORM

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. Below the search bar, there is a navigation menu with options: Home, Admin Unit, Unit Assessment, Mapping, Reports, and Documents. The main content area displays a "Unit Planning Summary" table.

| | 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] .

| Outcomes (Step 1) | | |
|----------------------|--|-------|
| PO-01: Test Outcome | This is our first test performance outcome. (In Use) | ✎ ☰ 🗑 |
| PO-02: Test Outcome | This is our second test performance outcome. (No Longer In Use) | ✎ ☰ 🗑 |
| PO-03: Test Outcome | This is our third test performance outcome. | ✎ ☰ 🗑 |
| SLO-01: Test Outcome | This outcome should be written with correct spelling, punctuation, capitalization, and grammar. (In Use) | ✎ ☰ 🗑 |

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.

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.

Training Unit > Mapping > Outcomes Map

Home Admin Unit Unit Assessment Mapping Outcomes Maps Reports Documents

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. | | | |

Save

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].

Training Unit > Unit Assessment > Data Collection and Analysis (Step 4)

Home Admin Unit Unit Assessment Plan (Steps 1-3) Data Collection and Analysis (Step 4) Mapping

PO-01: Test Outcome This is our first test performance outcome.

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

Direct Assessment Only Test Direct Assessment Method and Measure

PO-03: Test Outcome This is our third test performance outcome.

SLO-01: Test Outcome This outcome should be written with correct spelling, punctuation, capitalization, and grammar.

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.

Training Unit > Unit Assessment > Data Collection and Analysis (Step 4) > Add Data Collection and Analysis (Step 4)

Home 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.

Planned Assessment Years:
Start Date: 04/01/2019

Direct Assessment Only Test Direct Assessment Method and Measure
Criteria for Success (Step 3) Test Criteria for Success
Notes
Instruments Used: Capstone project

* Submission Date 04/18/2019

* Data Collection and Analysis (Step 4)

* Reporting Period

* Result

* Required field

Improvement Actions (Step 5)

Related Documents

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.

Training Unit > Unit Assessment > Data Collection and Analysis (Step 4) > Edit Data Collection and Analysis (Step 4)

Home Admin Unit Unit Assessment Plan (Steps 1-3) Data Collection and Analysis (Step 4) Mapping Reports Documents

PO-03: Test Outcome This is our third test performance outcome.

Planned Assessment Years:

Direct Assessment Only Method and measure
Criteria for Success (Step 3) criteria
Notes
Instruments Used: Benchmarks/comparison with peers, Essay question on exam

* Submission Date 04/04/2019

* Data Collection and Analysis (Step 4) Put some results in here.

* Reporting Period 2021 - 2022

* Result Assessed and Met

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

ADD IMPROVEMENT ACTIONS (STEP 5)

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

The screenshot shows the AMS system interface. The breadcrumb trail at the top reads: Training Unit > Unit Assessment > Data Collection and Analysis (Step 4) > Add Data Collection and Analysis (Step 4). The left sidebar contains navigation links: Home, Admin Unit, Unit Assessment (selected), Plan (Steps 1-3), Data Collection and Analysis (Step 4) (selected), Mapping, Reports, and Documents. The main content area displays the 'Add Data Collection and Analysis (Step 4)' form. The form includes a section for 'PO-02: Test Outcome' with a description 'This is our second test performance outcome.' Below this, there are fields for 'Planned Assessment Years' (Start Date: 04/01/2019), 'Direct Assessment Only' (Test Direct Assessment Method and Measure), 'Criteria for Success (Step 3)' (Test Criteria for Success), 'Notes', and 'Instruments Used' (Capstone project). The form also has fields for 'Submission Date' (04/18/2019), 'Data Collection and Analysis (Step 4)', 'Reporting Period', and 'Result'. A red arrow points to the 'Improvement Actions (Step 5)' button, which is a green circle with a plus sign. Below this button is a 'Related Documents' section with a green circle and a plus sign.

- Enter information into the following fields:
 - Submission Date:** This field will be auto-populated with the current date.
 - 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/>.

Training Unit > Unit Assessment > Data Collection and Analysis (Step 4) > Add Improvement Actions (Step 5)

Home Admin Unit Unit Assessment Plan (Steps 1-3) Data Collection and Analysis (Step 4) Mapping Reports Documents

PO-03: Test Outcome This is our third test performance outcome.

Direct Assessment Only Method and measure
Criteria for Success (Step 3) criteria
Notes

2021 - 2022 Assessed and Met 04/04/2019

Put some results in here.

* Submission Date 04/18/2019

* Improvement Actions (Step 5)

* Required field

- 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

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

AA - Assessment and Institutional Effectiveness > Admin Unit > Annual Assessment Summary > Add An

Home Admin Unit Unit Assessment Annual Assessment Summary Plan (Steps 1-3) Data Collection and Analysis (Step 4)

* Academic Year

Assessment Reporting Status

What challenges were faced during this assessment reporting period?

How will these challenges be addressed and in what timeframe?

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]**.

The screenshot shows a web form with the following elements:

- A dropdown menu labeled “* Academic Year” with a downward arrow.
- A dropdown menu labeled “Assessment Reporting Status” with a downward arrow. The dropdown is open, showing two options: “Assessed at least one outcome this reporting period” (highlighted in blue) and “Did not assess any outcomes this reporting period”.
- Text input fields for “What challenges were faced during this assessment reporting period?” and “How will these challenges be addressed and in what timeframe?”.

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: **XSLO-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.

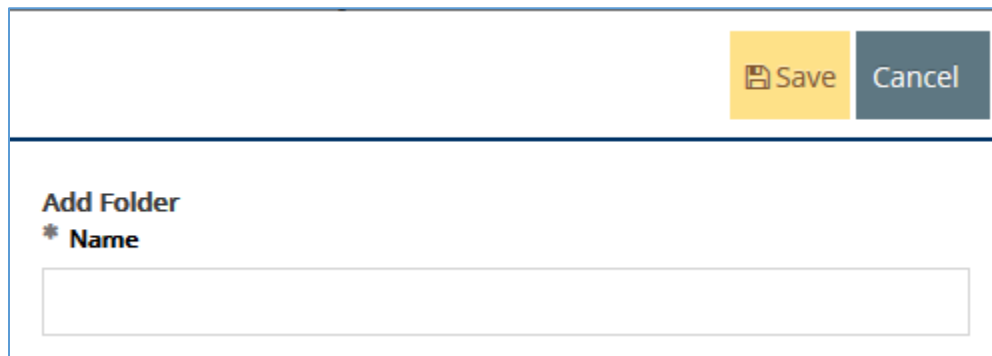
AMS ADMINISTRATION

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.



The screenshot shows a modal dialog box for adding a folder. At the top right, there are two buttons: a yellow 'Save' button with a floppy disk icon and a grey 'Cancel' button. Below the buttons, the text 'Add Folder' is displayed in a bold, dark blue font. Underneath, there is a label '* Name' in a bold, dark blue font, followed by a large, empty text input field with a light grey border.

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.

The screenshot displays the 'Standard Reports' configuration page for a 'Unit Assessment Report'. The interface includes a left-hand navigation menu with options: Home, Admin Unit, Unit Assessment, Mapping, Reports (selected), Ad Hoc Reports, and Documents. The main content area is titled 'Training Unit > Reports > Standard Reports > Unit Assessment Report'. It features a yellow 'Open Report' button and a grey 'Return' button. The configuration is divided into three sections: 'Layout', 'Filter', and 'Options'. The 'Layout' section includes fields for Format (PDF), Report Title (Unit Assessment Report), Report Subtitle, and Report Logo (wordmark*). The 'Filter' section includes fields for Outcome Status, Planned Assessment Years, Measure Type, Sort Data Collection and Analysis (Step 4) (Ascending/Descending), Submission Date Between, Reporting Periods, and Results. The 'Options' section is currently empty.

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 Reports tab from navigation on left, then click Ad-Hoc sub-tab.
3. Click the green plus sign icon.

The screenshot shows the 'Edit Report' interface for Ad-Hoc Reports. The left sidebar contains a navigation menu with options like Home, Institution, Reports, Documents, Unit Management, Personnel, Configuration, Application Settings, Report Settings, and LMS Settings. The 'Reports' section is expanded, showing 'Ad Hoc Reports'. The main content area has a top bar with 'Open Report', 'Save', and 'Return' buttons. Below this, there are configuration fields:

- * Format: Excel (dropdown)
- * Layout: Landscape (dropdown)
- * Report Title: (text input)
- Report Subtitle: (text input)
- Description: (text input)
- * Data View: Activity Log - Course Plan (dropdown)
- * Selected Units: AA - Assessment and Institutional Effectiveness (link)

 At the bottom, there are three sections: 'Fields' (listing Unit Name, Course ID, Course Name, Date, Last Name, First Name), 'Columns' (with 'Drag Group By Fields Here' and 'Drag Fields Here' instructions), and 'Where Clause' (with a dropdown for Unit Name and an 'Insert' button).

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.

This is a close-up of the report configuration form. It shows the following fields:

- * Format: Excel (dropdown)
- * Layout: Landscape (dropdown)
- * Report Title: Example Report (text input)
- Report Subtitle: (text input)
- Description: (text input)
- * Data View: Activity Log - Course Plan (dropdown)
- * Selected Units: AA - Assessment and Institutional Effectiveness (link, highlighted with a red box)

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

The screenshot displays the AMS interface for selecting units. At the top right is a 'Done' button. Below it, there are two main panels: 'Selected Units' and 'Selected'.

Selected Units: This panel shows 'Available Showing all 205' units. It includes a 'Filter' input field and a 'show all' button. Below the filter, there are two arrow icons (left and right) for moving units between panels. The right arrow icon is highlighted with a red box. A list of units is shown below the arrows, including 'AA - General Education', 'AA - Irvine Center', 'AA - University Library', 'AA/AP - Academic Programs', 'AA/AP: Academic Advisement Center', 'AA/AP: First Year Experience', 'AA/AP: Graduate Studies', 'AA/AP: Health Professions Advising', 'AA/AP: Scheduling', 'AA/AP: Undergraduate Programs and General Ed', 'AA/AP: University Honors Program', 'AA/AP: Writing Across the Curriculum', 'AA/EIP: Pre-Health Professions Post-baccalaureate', 'AA/EIP: Professional Development', 'AA/EIP: Study Abroad (EIP)', 'AF - Administration and Finance', 'Annual Plan TEMPLATE', 'Annual Plan: Test Unit', 'CCOM: Cinema and Television Arts BA', 'CCOM: Communication Studies BA', and 'CCOM: Communication Studies MA'.

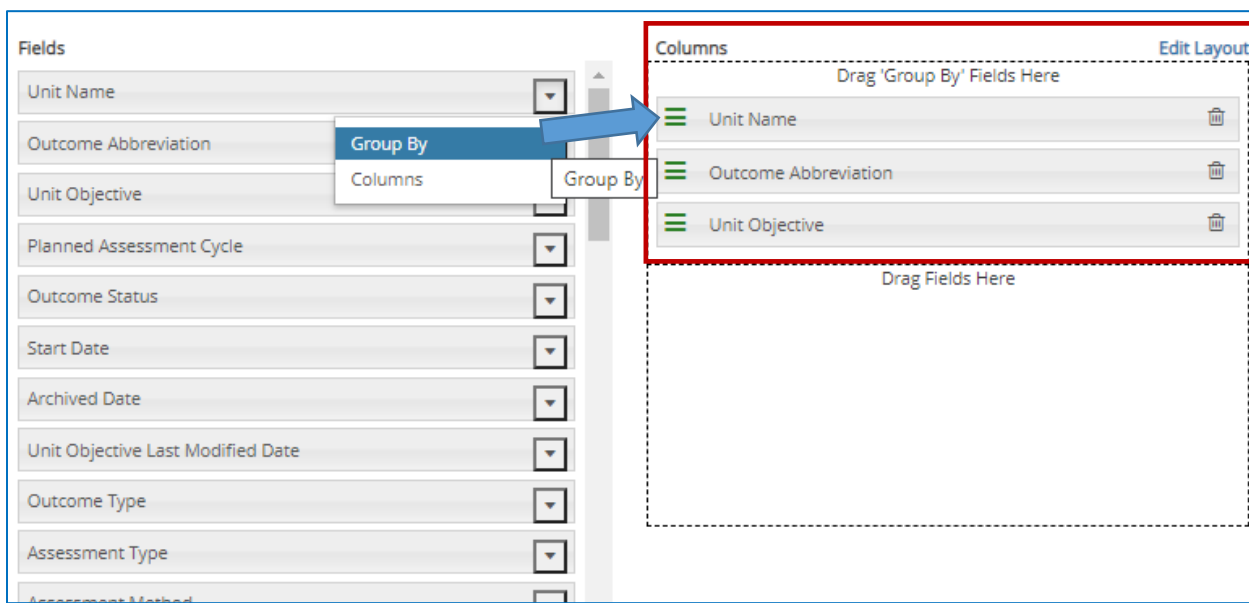
Selected: This panel shows 'Showing all 1' unit. It includes a 'Filter' input field and a 'show all' button. Below the filter, there are two arrow icons (left and right) for moving units between panels. The left arrow icon is highlighted with a red box. A list of units is shown below the arrows, including 'AA - Assessment and Institutional Effectiveness'.

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.

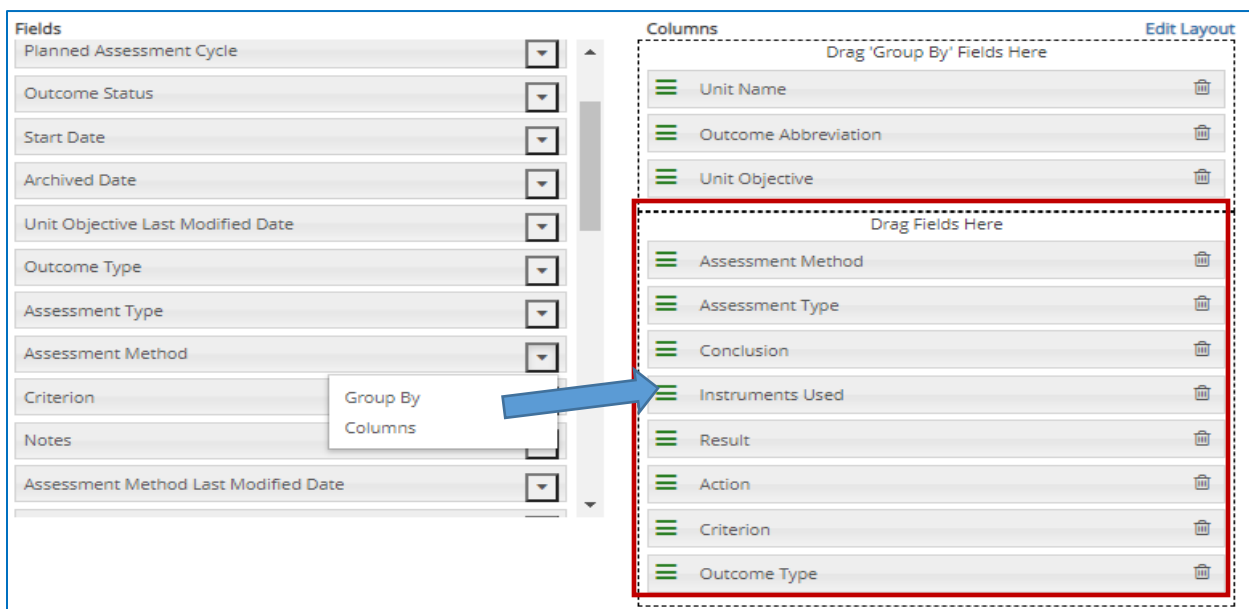
The screenshot displays the AMS interface for selecting a data view. It shows a 'Description' field, a '* Data View' dropdown menu, and a '* Selected Units' section. The 'Data View' dropdown is open, showing a list of data views. The selected data view is 'Assessment Unit - Results (Related to Assessment Methods)'. Other data views in the list include 'Activity Log - Course Plan', 'Assessment Unit - Results (Related directly to Tasks related to Goals)', 'Assessment Unit - Results (Related directly to Unit Objectives related to Goals)', 'Assessment Unit - Results (Related directly to Unit Objectives)', 'Assessment Unit - Results (Related to Tasks)', 'Assessment Unit - Unit Objectives by Objective Status', 'Assessment Unit - Unit Objectives by Planned Assessment Cycle', 'Assessment Unit - Unit Summary', 'Institution - General', 'Reporting Unit - General', 'Reporting Unit - Results', 'Reporting Unit - Summary', 'Unit - Goal Relationships', and 'Unit - Goals'.

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.

- 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.
- Use the trash can icon to remove fields.



- 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.
 - 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.
 - Use the trash can icon to remove fields.



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

* Selected Units 200

Columns

Drag 'Group By' Fields Here

Unit Name

Outcome Abbreviation

Drag Fields Here

Where Clause

Unit Name =

AND OR

OBSERVATIONTYPE = 'Assessed and Met' AND CF46 = 'Learning Outcome' AND ASSESSMENTMETHODCATEGORY = 'Both'

Clear

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

Edit Layout (PDF , Landscape)

* Title

| Unit Name | Outcome Ab | Assessment | Result | Conclusion | Action | Reporting Pt | Outcome Sta |
|-----------|------------|------------|--------|------------|--------|--------------|-------------|
| | | | | | | | |

Footer Summary

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

- Click “Save”
- Click “Open Report”

Open Report

Save

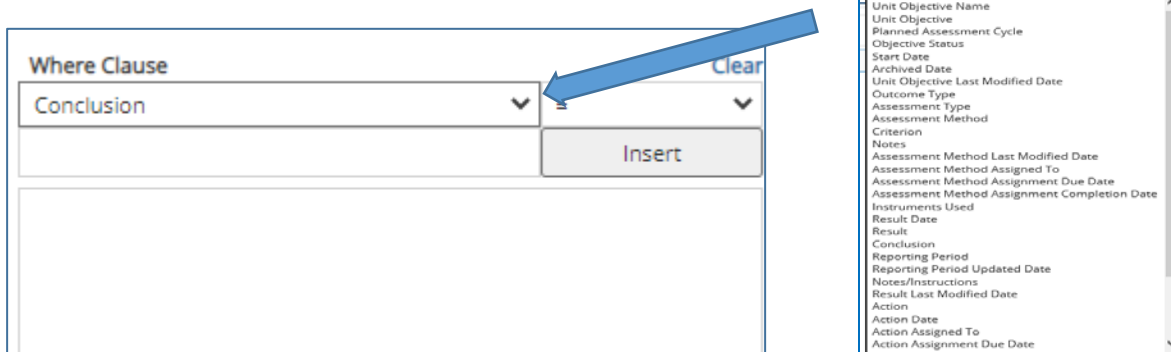
Return

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.

| | E | I | |
|---------------------------------|--------------------------|----------------------|-------------------------------------|
| | Assessment Type | Conclusion | Action |
| atory (GPI), a web-based | Indirect Assessment Only | Assessed and Met | For the past two years, we have rep |
| ressiveness scale (Infante & | Indirect Assessment Only | | |
| ressiveness scale (Infante & | Indirect Assessment Only | | |
| 495 (Internship) and to six | Both | Assessed and Met | For the most part, the area profess |
| 495 (Internship) and to six | Both | Assessed and Met | Suggested areas for student improv |
| s, a COMM requirement in all | Both | Assessed and Met | COMM 410 instructional faculty ha |
| it. The 2017-2018 version is | Both | | |
| it. Program Learning Outcome #8 | Both | Assessed and Met | We consider 100 reports a success |
| it. Program Learning Outcome #8 | Both | Assessed and Met | We consider 100 reports a success |
| it. Program Learning Outcome #8 | Both | Assessed and Not Met | A faculty discussion has begun. Is |
| it. Program Learning Outcome #8 | Both | Assessed and Not Met | A faculty discussion has begun. Is |
| ethods and measures (Spring | Direct Assessment Only | | |

12. Filter results by using far right table.

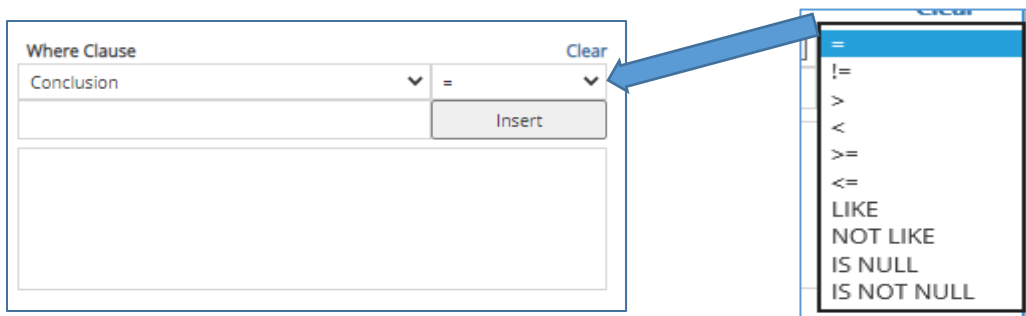
- a. Select a field (e.g. Conclusion) to use as a filter from the first drop down.



The 'Where Clause' interface shows a dropdown menu with the following fields listed:

- Unit Name
- Unit Objective Name
- Unit Objective
- Planned Assessment Cycle
- Objective Status
- Start Date
- Archived Date
- Unit Objective Last Modified Date
- Outcome Type
- Assessment Type
- Assessment Method
- Criterion
- Notes
- Assessment Method Last Modified Date
- Assessment Method Assigned To
- Assessment Method Assignment Due Date
- Assessment Method Assignment Completion Date
- Instruments Used
- Result Date
- Result
- Conclusion
- Reporting Period
- Reporting Period Updated Date
- Notes/Instructions
- Result Last Modified Date
- Action
- Action Date
- Action Assigned To
- Action Assignment Due Date

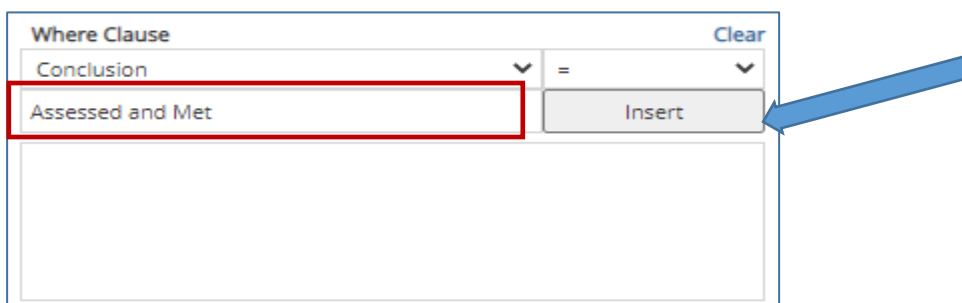
- b. Select the type of filter (e.g. =) to use from the second drop down.



The second dropdown menu shows the following filter operators:

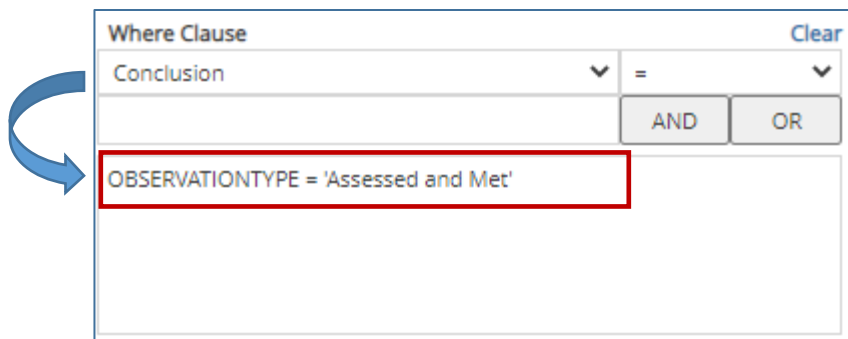
- =
- !=
- >
- <
- >=
- <=
- LIKE
- NOT LIKE
- IS NULL
- IS NOT NULL

- 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.



The 'Where Clause' interface shows the filter criteria 'Assessed and Met' entered in the text box. The 'Insert' button is highlighted with a blue arrow.

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’.



Where Clause Clear

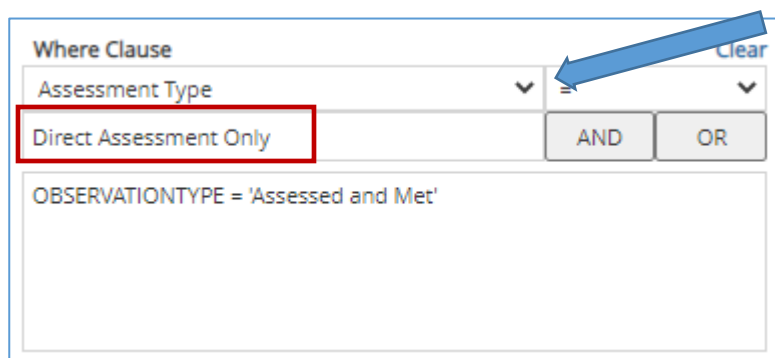
Conclusion =

AND OR

OBSERVATIONTYPE = 'Assessed and Met'

13. Use Boolean Operators to combine more than one filter.

- Select an additional field from the dropdown (e.g. Assessment Type).
- Type in the filter criteria that corresponds to the new field (e.g. Direct Assessment Only).



Where Clause Clear

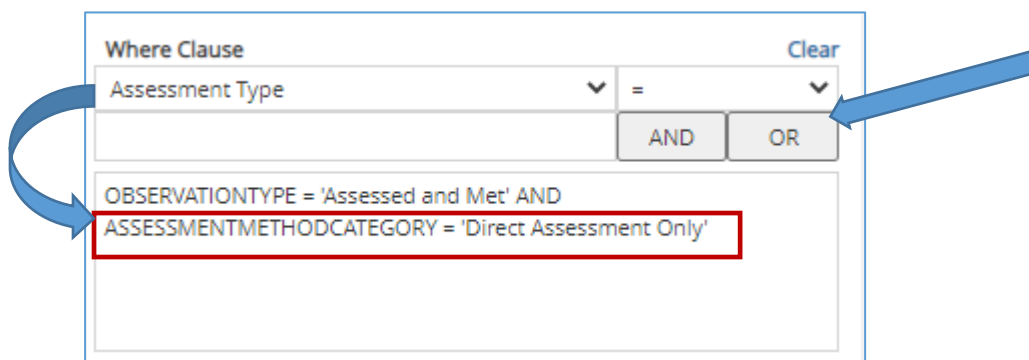
Assessment Type =

AND OR

OBSERVATIONTYPE = 'Assessed and Met'

Direct Assessment Only

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



Where Clause Clear

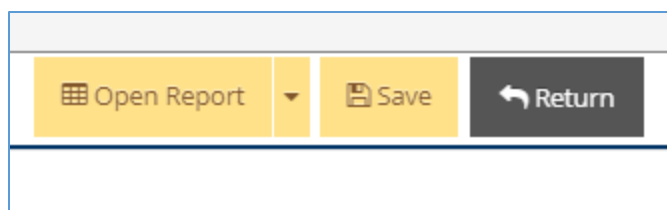
Assessment Type =

AND OR

OBSERVATIONTYPE = 'Assessed and Met' AND

ASSESSMENTMETHODCATEGORY = 'Direct Assessment Only'

- Click “Save” and “Open Report” to run.



Open Report Save Return

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.

| 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