Nuventive Guide for Administrative Assessment

# Sections within This Guide:

1. [Accessing Nuventive](#_Accessing_Nuventive)
2. [Entering and Updating General Information](#_Viewing,_Entering,_and_1)
3. [Entering and Updating Goals](#_Viewing,_Entering,_and_2)
4. [Entering and Updating Objectives](#_Viewing,_Entering,_and)
5. [Entering and Updating Assessment Methods](#_Viewing,_Entering,_and_3)
6. [Entering and Updating Assessment Results](#_Viewing,_Entering,_and_4)
7. [Mapping](#_Mapping_(Link_the)
8. [Adding Documents to the Document Library](#_Adding_Documents_to)
9. [Reports](#_Reports)
10. [Submitting the Assessment Report](#_Submitting_the_Assessment)

# Accessing Nuventive

1. Login to [solutions.nuventive.com](http://solutions.nuventive.com/) with your George Mason NetID username and password
2. Once logged in you will automatically be taken to your unit’s Home Page
3. If you oversee multiple administrative units, use the organization drop down menu in the top middle of the screen to switch to a different unit

# Entering and Updating General Information

1. Select the hamburger menu icon  in the top left corner and click *General Information*
2. To enter your unit’s general information for the first time, click the plus icon  in the top right corner
3. To edit this information, click the three vertical dots  on the right side of the screen and select *Open*
4. When actively editing General Information for your unit:
	1. Type directly in the Mission Statement field with the mission of the specific unit
	2. Use the Executive Office and Department/Division dropdowns to update your organizational structure
	3. Type directly in the Assessment Contact field with the name of the person responsible for the unit’s assessment
	4. When finished editing, click *SAVE* in the top right corner

# Entering and Updating Enduring Goals

1. Select the hamburger menu icon  in the top left corner and click *Enduring Goals*
2. To add a new goal, click the plus icon  in the top right corner
3. To edit an existing goal, click the three vertical dots  on the right side of a goals card and select *Open*
4. When in a goals card actively editing:
	1. Type directly in the Enduring Goals Short Name field with a short title for the goal
	2. Type directly in the Enduring Goal field with the full description of the goal
	3. Use the Goal Cycle dropdown to select which year(s) this goal applies to
	4. Use the Goal Status dropdown to identify this as an active or archived goal
	5. Once you have finished your edits, click *SAVE* in the top right corner
5. To filter the goals, use the *Goal Status* and *Goal Cycle* filters at the top of the screen to limit which goals are displayed
	1. *Goal Status* filters for goals that are Active or Archived
	2. *Goal Cycle* filters to view goals associated with specific years
	3. To clear a filter and view all, click on the X next to the filter label(s)
6. To rearrange the goal order, hover over the six-dot icon  to the left of the goal name until your pointer becomes a hand icon, then click and drag the goal to move it up or down the list (You must first clear all filters before you can rearrange the goal order)

# Entering and Updating Objectives

1. Select the hamburger menu icon  in the top left corner, expand *Admin Assessment*, and select *Admin Assessment*
2. To add a new objective, click the plus icon  in the top right corner
3. To edit an existing objective, click the three vertical dots  on the right side of an objective card and select *Open*
4. When in an objective card actively editing:
	1. Type directly in the Objective Name field with a short title for the objective
	2. Type directly in the Objective field with a full objective statement
	3. Use the Objective Status dropdown to identify this as an active or archived objective
	4. Use the Assessment Period(s) dropdown to select which year(s) this objective was assessed
	5. If the objective relates to George Mason’s Strategic Direction, use the dropdown to select the strategic priority to which it aligns
	6. Once you have finished your edits, click *SAVE* in the top right corner
5. To filter the objectives, use the *Assessment Period(s)* and *Objective Status* filters at the top of the screen to limit which objectives are displayed
	1. *Assessment Period(s)* filters for objectives associated with specific years
	2. *Objective Status* filters for objectives that are active or archived
	3. To clear a filter and view all, click on the X next to the filter label(s)
6. To rearrange the objective order, hover over the six-dot icon  to the left of the objective name until your pointer becomes a hand icon, then click and drag the objective, moving it up or down the list (You must first clear all filters before you can rearrange the objective order)

# Entering and Updating Assessment Methods

1. Follow the [Entering and Updating Objectives](#_Viewing,_Entering,_and) steps 1-3 to open an objective
2. Choose the *Assessment Method* tab in the top middle of the objective card
3. To add a new assessment measure, click the plus icon  in the top right corner
4. To edit an existing assessment measure, click the three dots  at the top right of the measure, and select *Open*
5. When in an assessment measure and actively editing:
	1. Use the Assessment Measure Status dropdown to select this as an active or archived measure
	2. Type directly in the Description of Assessment Measure field with a full description of the measure
	3. Type directly in the Achievement Target field with the level at which this objective would be considered met
	4. Type directly in the Individual(s) Responsible for Assessment field with the person(s) who are responsible for this measure
	5. Click the plus button  in the Supporting Documentation section to add any documents that support your measure (rubrics, instructions, etc.)
	6. When finished editing, click *SAVE* in the top right corner, and *CLOSE* to return to seeing all assessment measures

# Entering and Updating Assessment Results

1. Follow the [Entering and Updating Objectives](#_Viewing,_Entering,_and) steps 1-3 to open an objective
2. Choose the *Results* tab in the top of the objective card (the rightmost tab)
3. To add a new results entry, click the plus button  next to the associated measure
4. To update an existing results entry, click the three dots  at the top right of the card, and select *Open*
5. When in a results entry actively editing:
	1. Select a date from the calendar in the Findings Date field
	2. Choose which year these results are for in the Reporting Period dropdown
	3. Select whether you met, partially met, or did not meet the target in the Conclusion field
	4. Type directly in the Results Discussion and Analysis field with conclusions based off of the assessment findings
	5. Click the plus button  beneath Supporting Documents to add any relevant documents (exports of results, rubrics, etc.)
	6. Type directly in the Charts & Graphs field with any visuals to illustrate your findings
	7. Type directly in the Recent Activities & Improvements field to describe what activities or improvements have been implemented over the last year to support this objective
	8. Type directly in the Future Improvements field with what activities or improvements will be implemented moving forward as a result of this year’s assessment
	9. Select a date from the calendar in the Future Improvements Completed By field
	10. Type directly in the Individual(s) Responsible for Improvement Plan field with who will own implementing the improvements
	11. Type directly in the Resources Needed field with what would be required for these improvements to be implemented
	12. When finished editing, click *SAVE* in the top right corner and *CLOSE* to return to seeing all entries

# Mapping (Link the Goal and Objective)

1. Select the hamburger menu icon  in the top left corner, expand *Admin Assessment,* and select *Goal Mapping*
2. Goals are presented on the left side and objectives are presented across the top – select an intersection to align a goal and objective (an X will appear in the box)
	1. Click this intersection a second time to remove the X
3. When finished editing, click *SAVE* in the top right corner
4. Limit the objectives displayed on the map with the *Assessment Period(s)* and *Objective Status* filters located at the top of the page

# Adding Documents to the Document LIbrary

1. Select the hamburger menu icon  in the top left corner, and select *Documents*
2. To open an existing folder, click on the name of the folder
3. To create a new folder click the create folder icon  in the top right corner
4. Once in a folder, you can add documents by clicking the Add Document icon  in the top right corner
5. Click the *Choose Files* button to select your document for upload. The Name will populate, and you can add a description if desired
6. Click *Save* – your document should now appear in the selected folder

# Reports

1. Select the hamburger menu icon  in the top left corner, and select *Reports*
2. In the right-hand panel you will have a few report choices including:
	1. Assessment Report: Column (Admin) – formatted in two columns, includes all assessment information, and filters on *Goal Status*, *Assessment Period(s),* and *Reporting Period*
	2. Assessment Report: Narrative (Admin) – formatted as a narrative, includes all assessment information, and filters on *Goal Status*, *Assessment Period(s),* and *Reporting Period*
3. Select your report, choose your filters, and click *RUN REPORT* in the top right corner
4. The report will generate in the right-hand panel; you are also able to download or print the report from this screen

# Submitting the Assessment Report

1. There is no “Submit” button and no need to formally submit the report as long as you have been saving your input
2. OIEP will access the saved information in Nuventive to check submissions