Office of the Provost
INSTITUTIONAL EFFECTIVENESS AND PLANNING
George Mason University

Nuventive Guide for Administrative Assessment

SECTIONS WITHIN THIS GUIDE:

ACCESSING NUVENTIVE

1. Login to 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:
   a. Type directly in the Mission Statement field with the mission of the specific unit
   b. Use the Executive Office and Department/Division dropdowns to update your organizational structure
   c. Type directly in the Assessment Contact field with the name of the person responsible for the unit's assessment
   d. 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:
    a. Type directly in the Enduring Goals Short Name field with a short title for the goal
    b. Type directly in the Enduring Goal field with the full description of the goal
    c. Use the Goal Cycle dropdown to select which year(s) this goal applies to
    d. Use the Goal Status dropdown to identify this as an active or archived goal
    e. 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
    a. *Goal Status* filters for goals that are Active or Archived
    b. *Goal Cycle* filters to view goals associated with specific years
    c. 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 *Objectives Assessment*, and select *Objectives, Methods & Results*
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:
    a. Type directly in the Objective Name field with a short title for the objective
    b. Type directly in the Objective field with a full objective statement
    c. Use the Assessment Period(s) dropdown to select which year(s) this objective was assessed
    d. Type directly in the Action Items and Milestones field with activities or improvements needed to achieve the objectives
    e. If the objective relates to George Mason's Strategic Direction, use the dropdown to select the strategic priority to which it aligns
    f. Once you have finished your edits, click *SAVE* in the top right corner
5. To filter the objectives, use the *Assessment Period(s)* filter at the top of the screen to limit which objectives are displayed
    a. *Assessment Period(s)* filters for objectives associated with specific years

    b. 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 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:
    a. Use the Assessment Measure Status dropdown to select this as an active or archived measure
    b. Type directly in the Achievement Target field with the level at which this objective would be considered met
    c. Type directly in the Description of Assessment Measure field with a full description of the measure
    d. Type directly in the Individual(s) Responsible for Assessment field with the person(s) who are responsible for this measure
    e. Click the plus button ⊕ in the Supporting Documentation section to add any documents that support your measure, e.g., rubrics, instructions, etc. (Documents should first be uploaded to the *Document Library* – See below)
    f. 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 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:
    a. Select a date from the calendar in the Findings Date field
    b. Choose which year these results are for in the Reporting Period dropdown
    c. Select whether you met, partially met, or did not meet the target in the Conclusion field
    d. Type directly in the Results Discussion and Analysis field with the assessment findings and discussion or analysis of the findings

e. Click the plus button beneath Supporting Documents to add any relevant documents, e.g., exports of results, rubrics, etc. (Documents should first be uploaded to the *Document Library* – See below)
f. Type directly in the Charts & Graphs field with any visuals to illustrate your findings
g. 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
h. Select a date from the calendar in the Future Improvements Completed By field
i. Type directly in the Individual(s) Responsible for Improvement Plan field with who will own implementing the improvements
j. Type directly in the Resources Needed field with what would be required for these improvements to be implemented
k. 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 *Objectives 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)
    a. 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
5. Limit the goals displayed on the map by clicking *Apply Filters* at the top of the goals column and selecting the desired goal status or goal cycle(s).

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:
    a. Assessment Report: Column (Admin) – formatted in two columns, includes all assessment information, and filters on *Goal Status*, *Assessment Period(s),* and *Reporting Period*
    b. 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