GETTING STARTED

This guide is meant to assist Nuventive Improve users at SFA in setting up unit and program assessment plans, inputting results, and answer any questions regarding the icons and options available within the software. If you need additional assistance with the software, help in formulating objectives, assessment methods and/or criterion, please contact the office of Institutional Effectiveness (936) 468-1038.

Step 1: Go to mySFA and enter your Username and Password.

Step 2: Click on the Resources tab. Then, click on the Nuventive Improve link.

Step 3: Start entering the name of the organization or use the drop down menu. When you see the organization, you are interested in, click on it.
You will initially see the unit home page. The home page gives you a basic compliance status of reporting. **Caveat - The "as of" reporting date is set by the IE office and changes throughout the day based on office workflows. You may see a red ❌ or a red flag 📈.**

The ❌ indicates that reporting requirements have not been met, and the 📈 indicates what information is missing in the report. (The "as of" dates for the screenshot example below were set for 2018-2019. The current reporting period for which reporting is not due yet.)

A green check ✔️ indicates that reporting for that objective is complete for the current "as of" year. This may not be the current year based upon what the IE staff is working on. Moving forward, we will have an improved compliance reporting capability that is not dependent on what the IE office is working on.

The “Home” or Unit Planning Summary view provides the objective title, the number of methods used to assess attainment of the objective, the number or results entered (each method should have a result), any action plans and follow-up actions to close the loop.
ADDING AND EDITING UNIT OBJECTIVES

Step 4: Click on Unit Planning on the left side of the screen to access the Unit Planning menu. Currently, we do not use Annual Updates or Periodic Updates. Clicking on Plan allows you to view the objectives in detail and the assessment methods used to measure the accomplishment of the objective. Clicking on Results provides the annual results of the assessment of each objective, the actions, and the follow-up comments.

If the objectives are collapsed, you will need to click on the triangle icon to expand the objective details.

Collapsed:

Expanded:

Active/Inactive Objectives: Click on the blue funnel on the top left of the page. To see only active objectives select Active in the Objective Status field. The same can be done to view only Inactive objectives. To view both active and inactive objectives, leave the Objective Status field blank.
Creating a New Objective

1. To add a new objective, click on the green plus sign to the right of the word Objectives (circled).

2. Complete the form in the pop-up window. Please include the date the objective will begin being assessed in the Start Date field. Choose Save and Return in the drop down on the far right of the screen to save the objective and return to the plan page.

Inactivating an Objective

1. To inactivate an objective, click the pencil and paper icon next to the objective name (circled).

2. Select Inactive from the Objective Status drop down menu. (circled)
Creating a New Assessment Method

1. Expand the objective if it is collapsed by clicking on the triangle to the left of the objective name. Click on the green plus icon to the right of the words Assessment Method (circled).

2. Fill out the Assessment Method form that appears to include the Assessment Method description, Criterion for acceptable performance, and the schedule that the assessment will occur (annual, semiannual, monthly, etc.). Also, please ensure that the Active button is checked to activate your assessment method.

Editing or Inactivating an Assessment Method

1. To edit or inactivate and assessment method, click on the pen and paper icon next to the assessment method name (circled).

2. From this screen, you can make changes to the assessment method description, criterion and/or the assessment schedule frequency. To inactivate an assessment method, uncheck the Active box. Click Save and Return to save your changes and return to the plan page.
INPUTTING RESULTS

1. When you are ready to report on your objectives, click on Results on the left side of the screen under Unit Planning on the home page.

2. Expand the objective you want to add results to by click on the arrow to the left of the Objective name. Click on the green plus icon to the right of the corresponding assessment method.

3. Complete the form that appears in the pop-up window. Ensure that all the required fields are filled in. Please input your name in the Person Entering Results field, as well. For results requiring additional action or for instances when additional action regarding the results will be taken, please input the actions taken by clicking the green plus icon on the same line as Actions to bring up the Actions input screen. Additionally, to store documents related to the results input, please click the green tool icon on the same line as Related Documents to upload the supporting documentation. Click Save and Return to go back to the results page.
Assignments

1. When creating an Assessment Method you can use the Assignments feature to send an email to anyone that you would like to enter results or provide information. Click on the green tool button next to Assignments under the corresponding Assessment Method on the Plan page.

2. Complete the pop-up form to assign the person responsible for completing the task, providing information or inputting results. You can email the assignment to them, which will send them a link and allow them to open the assignment in Nuventive Improve directly from the email. **Therefore, the person being assigned to enter results does not have to have a user account in Nuventive Improve.**
**Actions & Follow-ups**

When results call for additional actions (criterion not met or a change in the reporting period), you can add actions to the Result by clicking on the green plus icon to the right of Actions and complete the form on the page that appears. You will also be able to report on actions taken with a Follow-up and/or assign the action to someone with an Assignment.

*As a reminder, the person being assigned to enter results does not have to have a user account in Nuventive Improve.*

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**Objective Mapping**

Once your plan is complete, you can map your objectives to your Division, College, or Department goals and objectives and/or the Institution's Strategic Plan. Click on Objectives Mapping under the Mapping Tab on the left side menu. Use the drop down box to select the appropriate unit or the Strategic Plan. Your objectives will appear on the top row of the matrix, and the goals for the unit or Strategic Plan will appear in the column on the left side of the matrix. Check the boxes under each objective that corresponds to the VP's goal(s) or Strategic Plan goal(s).
Audit Logs

As an additional resource, the Plan and Results pages are equipped with an audit log that tracks the recent activity and changes made to assessment plans. The audit log can be accessed on either the Plan or Results page by clicking on the orange button on the top left side of the page. A drop down menu will appear at the top of the page showing all of the recent activity in chronological order starting with the most recent. To view the details of the changes made, click on the description in the Type column (Edit, Add, or Delete).

Reports

You can also create reports, which might be an easier way to review information until the new platform is ready for use. Click on Reports in the side bar menu. Then, click on Standard Reports. Assessment Unit Four Column Reports will print your assessment plan with results in a horizontal columned report. Assessment Plan Reports produces a report of your assessment plan in a vertical narrative format, and the criterion for each result is present. Both reports are downloaded in PDF format by default. On the report page, the first drop down box allows you to select PDF, Word, or HTML formatting.