TTUHSC Weave *How To Users Guide*

Weave Assessment Project

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1 How to Log In to Weave

Visit this link (https://app.weaveeducation.com/login/ttuhsc) and login with your TTUHSC credentials. (Do not use Internet Explorer as your internet browser.)

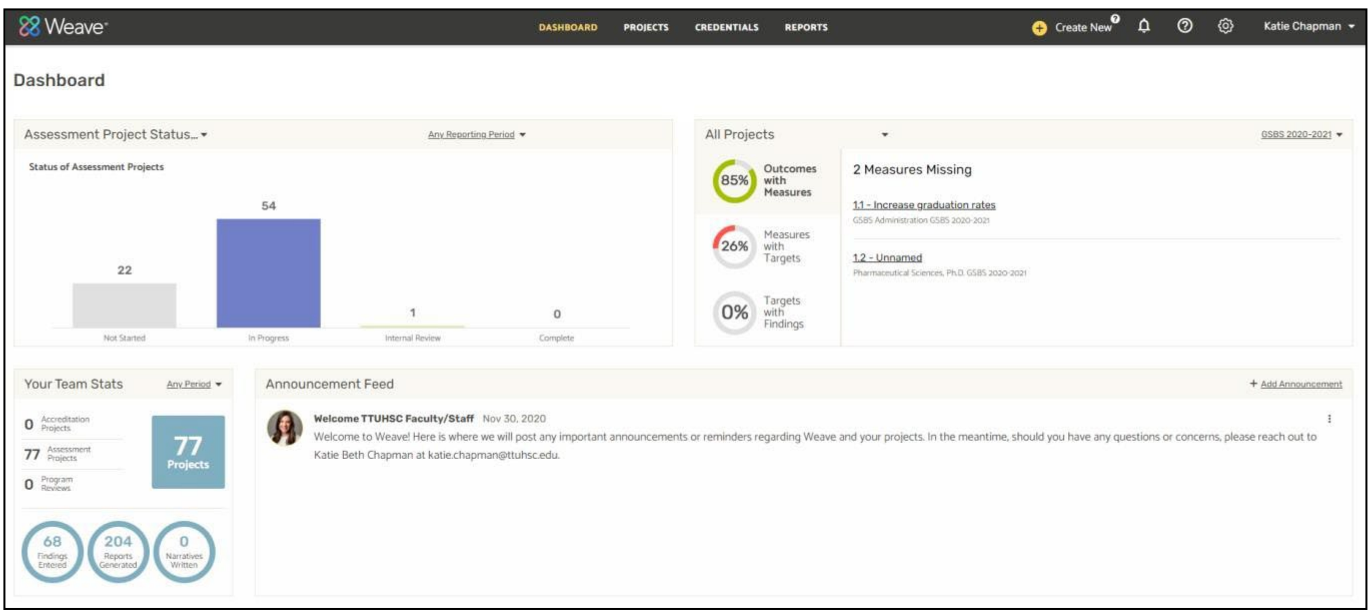
Your User ID and Password are the same as your eRaider ID and Password. New users must be given access to the Weave system by a TTUHSC Weave Administrator. If you need access, please contact kara.page@ttuhsc.edu and indicate the plan(s) for which you need access.

2 Navigating the Dashboard

Upon logging in, you will be brought to the Weave Dashboard. This page provides a graphical overview of the assessment projects that have been assigned to you. You will be able to see the status of your project(s) here and read any announcements from the Weave Administrator. You can also filter by reporting periods & projects to see the status of each element within the project.

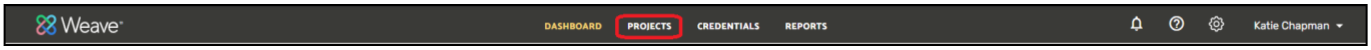
NOTE: Weave refers to continuous improvement/assessment "Plans" as "Projects."

Your dashboard will look similar to the screenshot below:



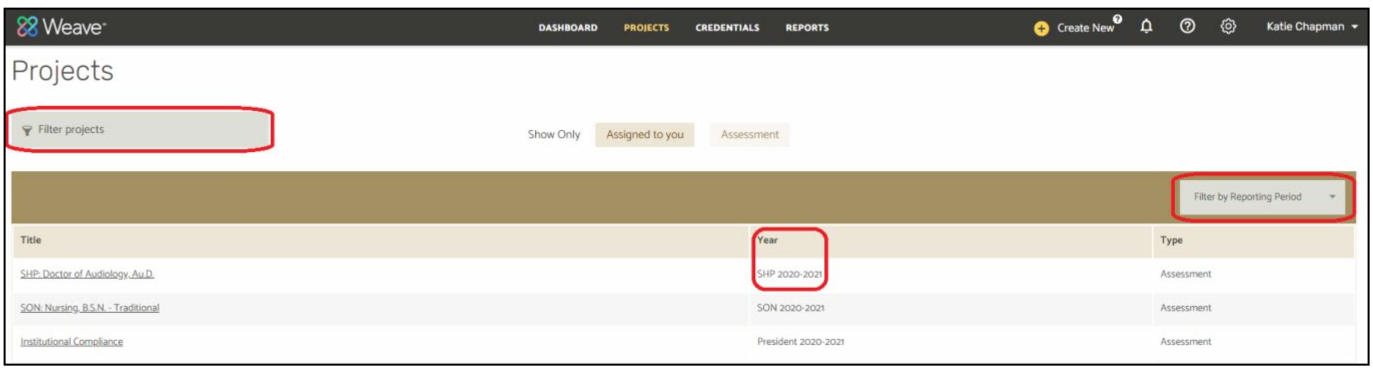
3 Selecting a Project

To access your plan(s) in Weave, you will select "Projects" at the top of the page. This option will be available at all times, so you can navigate between screens.

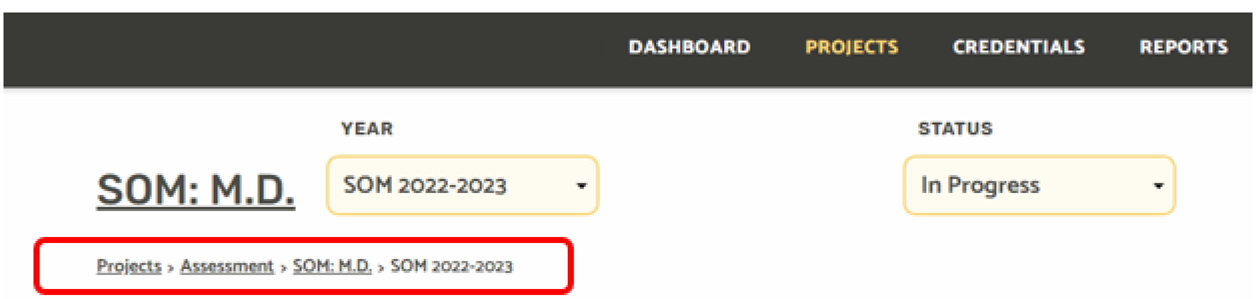


On the "Projects" page, you will see a list of plans that have been assigned to you. You can filter for a specific project by typing in that project's name in the "Filter projects" field. Or you can scroll through your list to access your specific project.

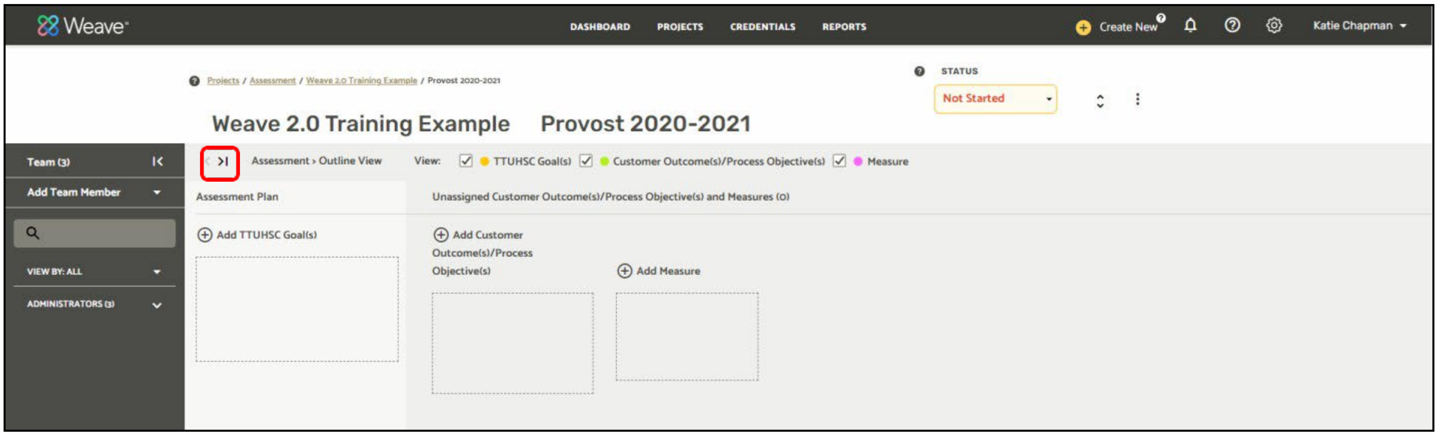
As the years go on, the number of your projects will increase & you will want to filter by the "Reporting Period" to ensure you are working on the correct plan for that reporting period. You will always want to double-check that the "Year" for the plan you are going to select is the correct one for that reporting period.



The title of your "Project" and the "Reporting Period" are located at the top of your project page. Please ensure you are working in the correct plan & reporting period if you have more than one.

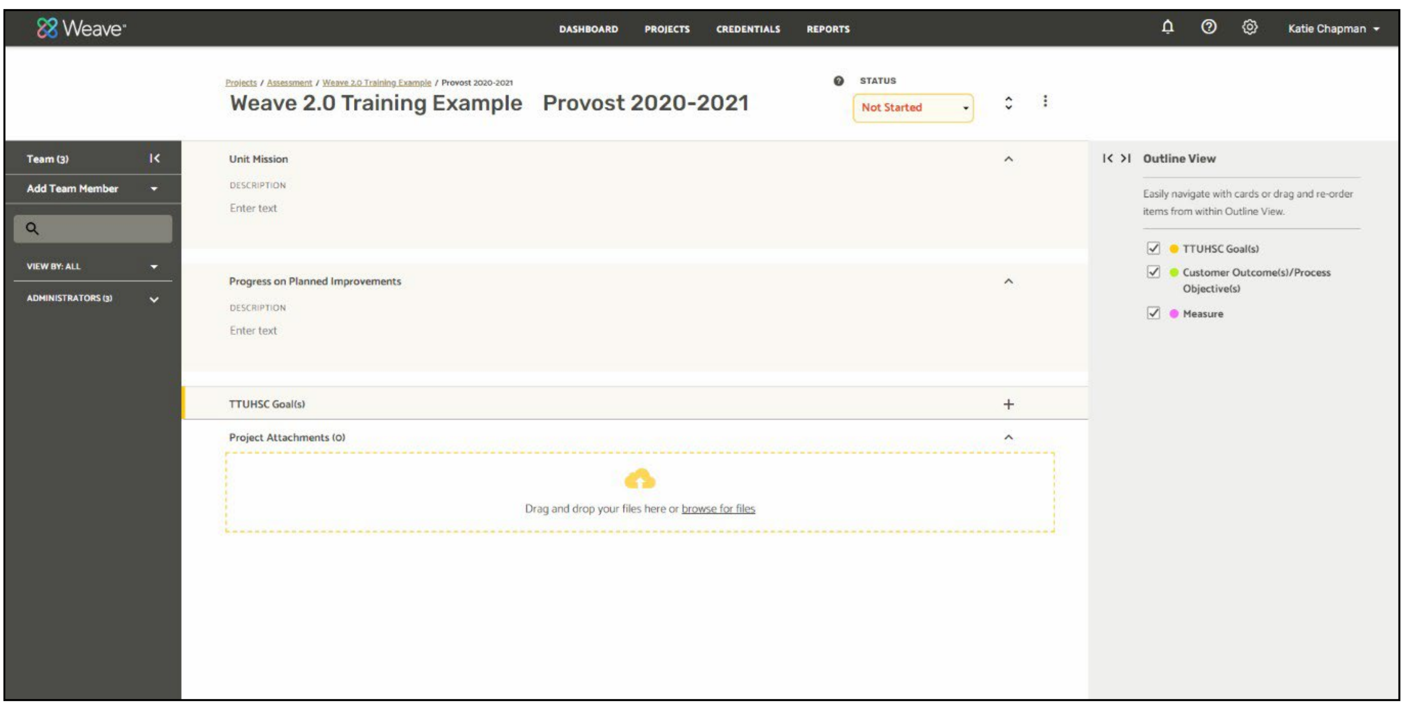


Once you have selected your project for the first time, your continuous improvement/assessment plan will be in Outline View mode like the screenshot below:



(For more on Outline View mode, see the “Rearranging Project Elements” section.)

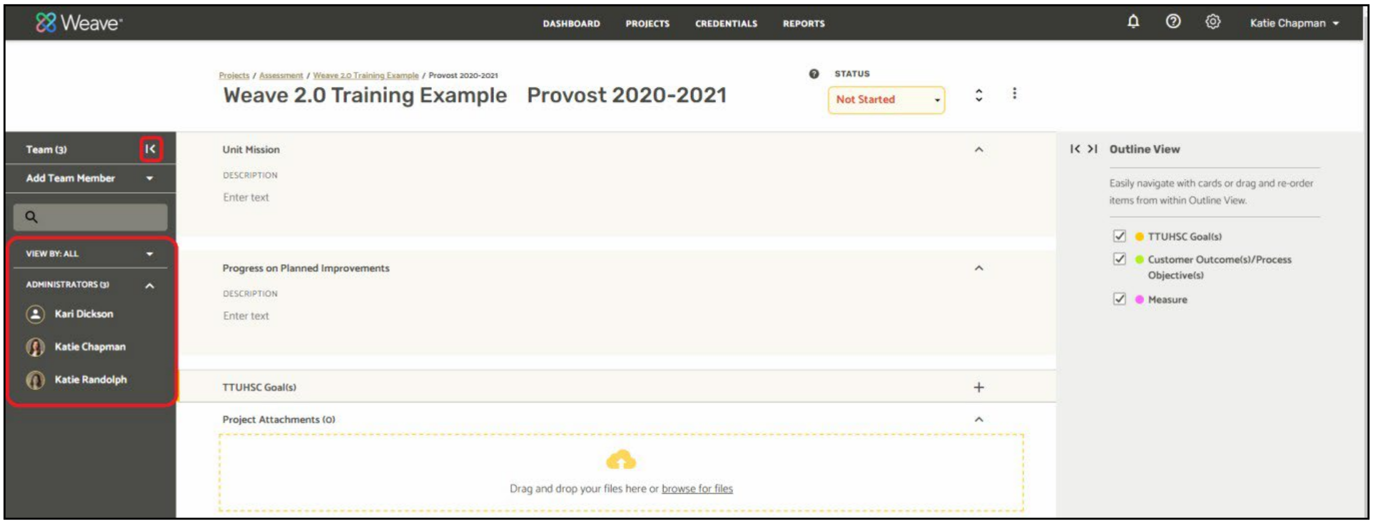
You will click on the right facing arrow in bold “**>|**” (circled above in red) to move your outline view to the right and access the fillable portion of your project as shown below:



4 Navigating & Completing Your Project

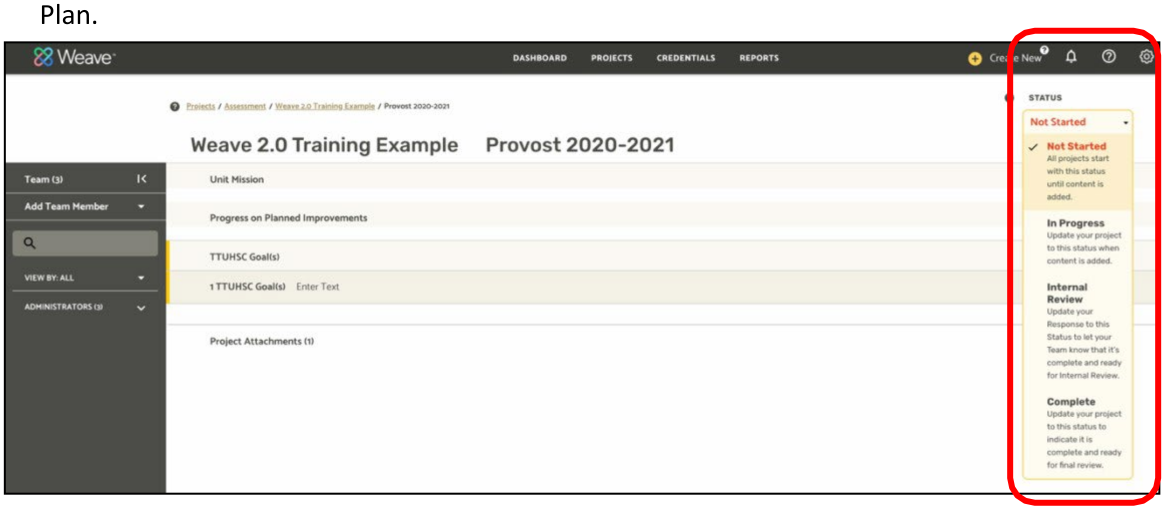
4.1 Project Status

You can view whom all has access to a plan by looking through the users listed on the left-hand side of your plan. You can minimize or expand this section by clicking on the bold arrow: **|<** (outlined below in red).



The Project Status will automatically be set to "Not Started" at the beginning of each cycle. As you work in your plan, please update the status accordingly. Once you begin working in your plan, your status should remain as "In Progress" until you have completed all elements at the end of the reporting period (no later than September 30th). Should you need another team member to review your plan at any time while you are working on it, you may change the status to "Internal Review." Please note, you will need to indicate to your other team member(s) that the plan is ready for their review, changing the status to "Internal Review" will not notify them. Once they have finished reviewing, the status will need to be changed back to "In Progress" or "Complete," whichever is appropriate.

- Project status options:
  - **Not started:** All projects start with this status until content is added.
  - **In Progress:** Update your project to this status once you have begun adding content.
  - **Internal Review:** Update your project to this status to indicate that your project is needing to be reviewed by another member of your team. Once the review is completed, please put your plan backas "In Progress" if still in the Planning Phase or as "Complete" if your plan is finished for the cycle.
  - **Complete:** Update your project to this status to indicate it is complete, including Findings and Action Plan.



4.2 Filling in Elements

When filling in the plan elements, click in any field that highlights yellow or has "Enter Text" to begin typing your information. Please note this is real-time editing. **Once you being typing, the information you input or edit will be automatically saved.**

4.2.1 Program/Unit Mission

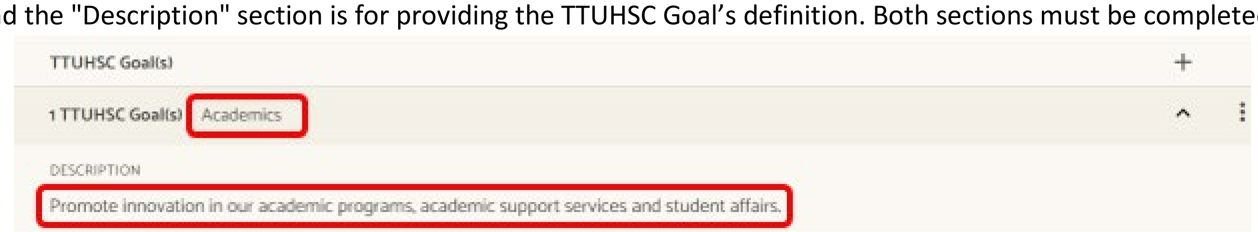
Input your Program/Unit's Mission Statement in this section.

4.2.2 Progress on Planned Improvements

In this section, review your Action Plan(s) for those Targets marked as *Partially Met* or *Not Met* from the previous cycle. Elaborate on the actions you took in the current cycle to address those issues. Upload any applicable documentation. If you marked *Met* on all Targets in the previous year, please give a brief summary of program/unit successes or improvements that happened during the last year.

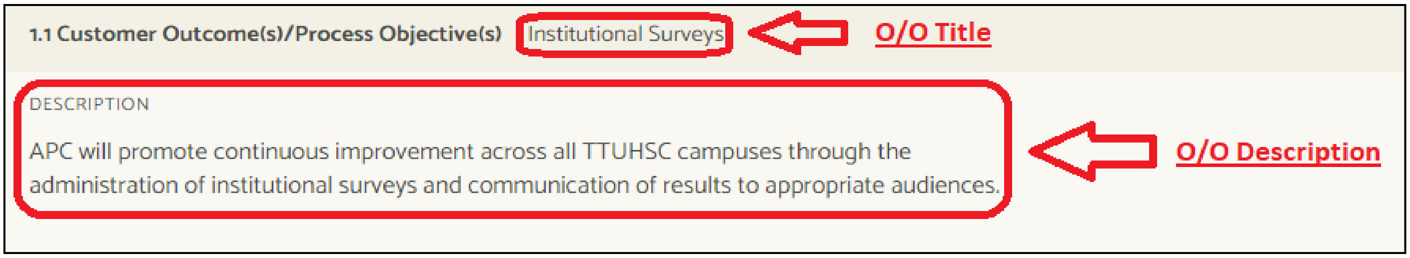
4.2.3 TTUHSC Goals

Input the title of a TTUHSC Strategic Goal in the small section next to TTUHSC Goal(s). Next, input the TTUHSC Strategic Goal's objective (Innovation or Collaboration) & definition in the "Description" section. **Only** use a TTUHSC Goal(s) from the TTUHSC Strategic Plan in this section. The "Enter Text" section to the right of the element is for the title of TTUHSC Goal and the "Description" section is for providing the TTUHSC Goal's definition. Both sections must be completed.



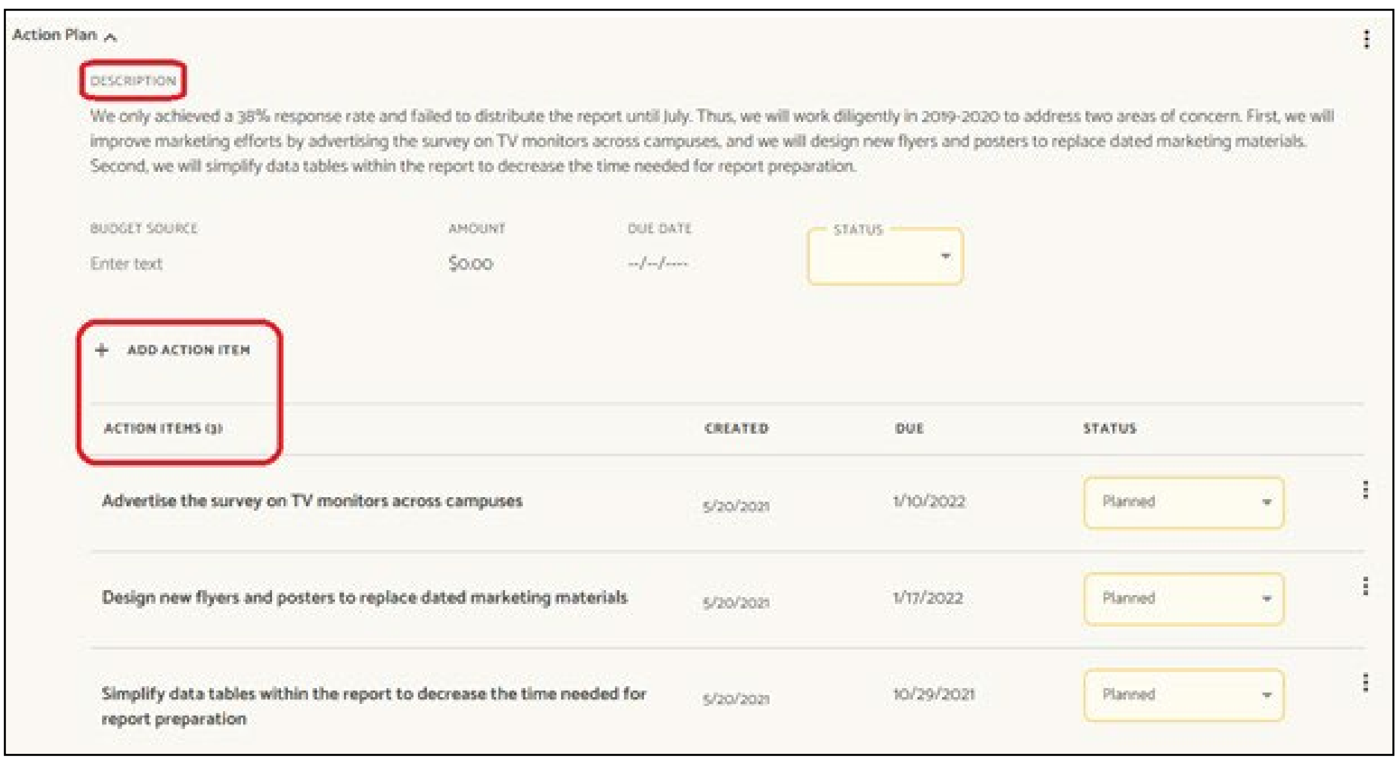
4.2.4 Outcomes/Objectives

Input the title of your Outcomes/Objectives (O/O) in the small box to the right and utilize the "Description" box to add the O/O. The "Enter Text" section to the right of Outcomes/Objectives is for the title of that O/O and the "Description" section is for providing the description of the O/O. Both sections must be completed.



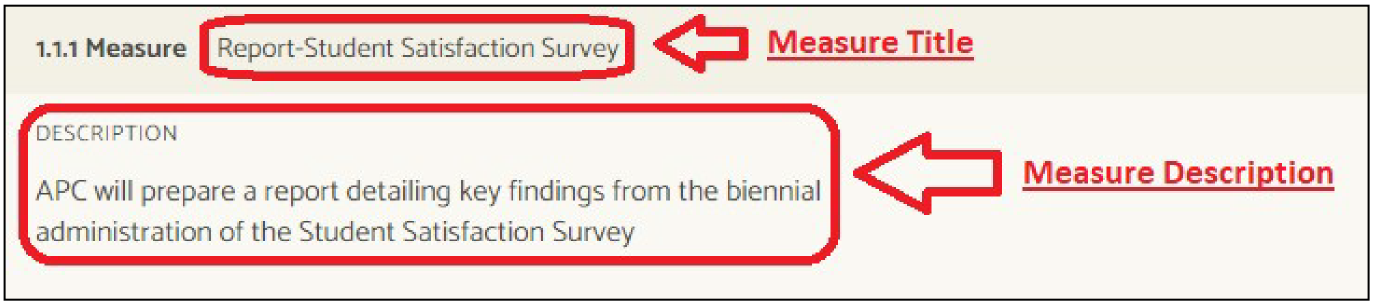
4.2.5 Action Plan

In the Action Plan "Description" box, provide a detailed description of the actions you plan to take for the Targets marked as *Partially Met* or *Not Met*. If beneficial, you can use the "Action Items" section to discuss each Target's Action Plan in more detail. Actions Items may be helpful when you have multiple targets or actions needed per Outcome/Objective. If all Targets were *Met*, we advise you to use this section to indicate what your department/unit will do to make general improvements over the next year. However, if your department does not have anything additional to add, please indicate "Target(s) was met. No action needed at this time."



4.2.6 Measures

Input the title of your Measure in the "Enter Text" section to the right of the element and utilize the “Description” box to provide details of the Measure. Both sections should be completed.

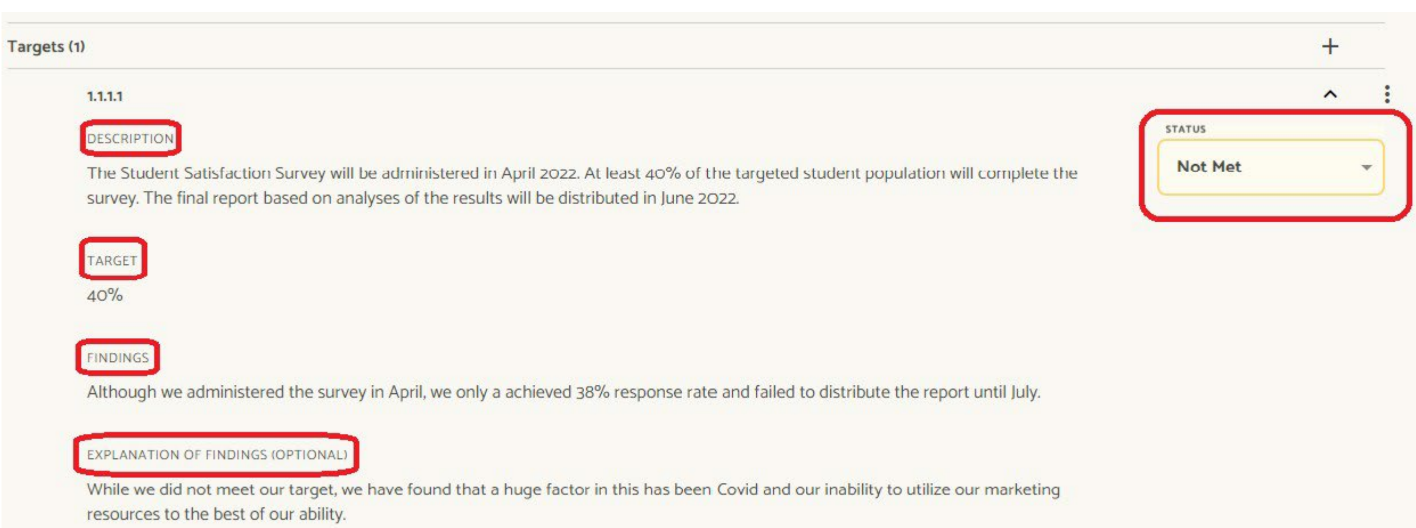


4.2.7 Targets

Input a detailed description of your Target in the “Description” section. Then, input the specific Target you are trying to reach in the “Target” section (this is typically a number). Upon completion of the cycle year, you will input Findings for the Target into the “Findings” section. Update the Target “Status” based on those Findings.

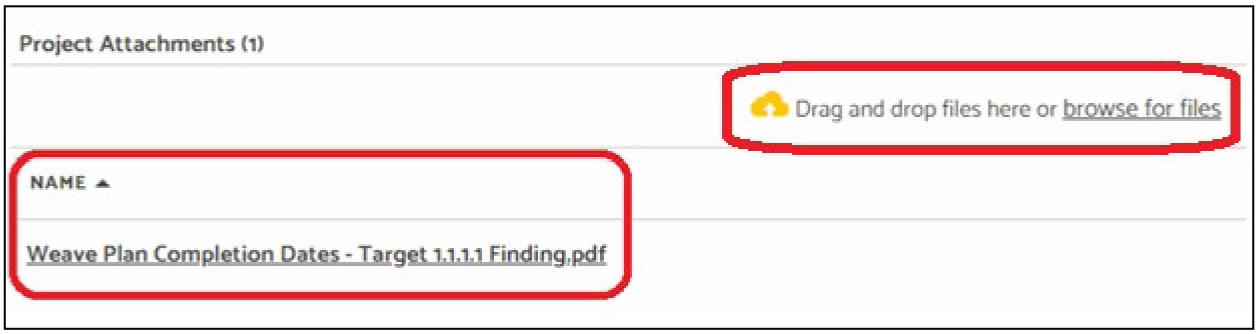
“Explanation of Findings (Optional)” is an optional section for you to utilize if you have more details you would like to provide in regards to your Findings.

NOTE: All three sections under Targets are limited to 255 characters. Keep this information specific and concise.



4.2.8 Project Attachments

Upload key documents that provide additional evidence or support for your Continuous Improvement Plan in the "Project Attachments" section. You can drag and drop attachments or upload them by selecting "browse for files." All attachments will be uploaded in one area; you will not be able to upload them specifically to an element/section. Save your file with a distinct and descriptive name (i.e., Annual Report for Targets 1.1.1.1 Findings). You must upload documents in formats to which most people have access (e.g., Word, Excel, PDF).

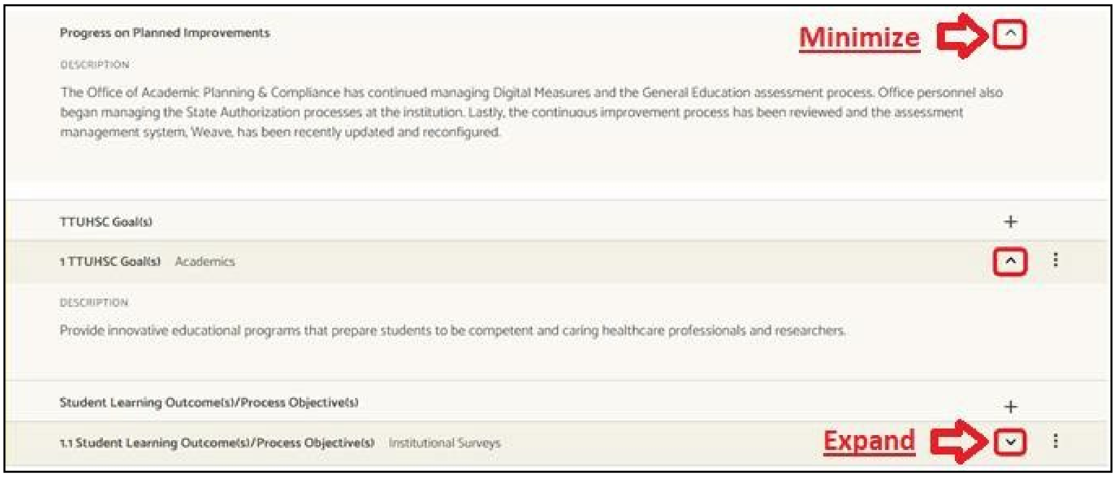


4.3 Adding New Elements to Your Project

To add an additional element to your project, you will click on the "+" next to the element you want to add.
Please note – when adding an outcome/objective, a dropdown box will appear with the option of "Program Level." This option is automatically populated in Weave; you will need to select it to continue.

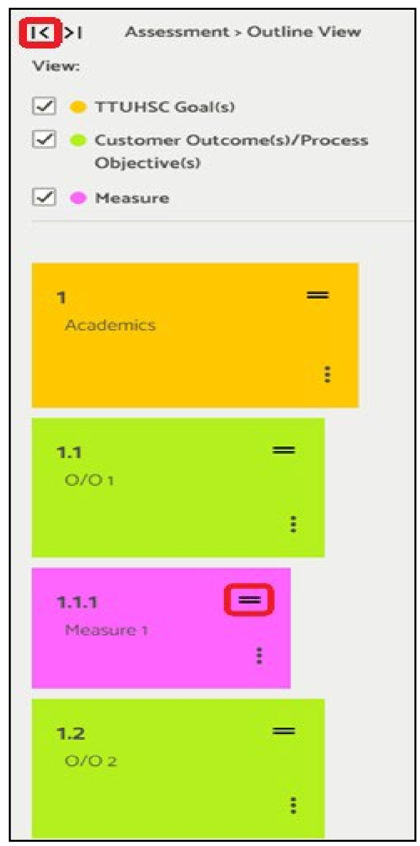
4.4 Toggling Elements in Your Project

To expand/minimize an element and its corresponding components, you will click on the up or down arrows next to the element. If you click the arrow while it is facing up, it will minimize the component; while clicking the arrow when it is facing down will expand it.



4.5 Rearranging Project Elements

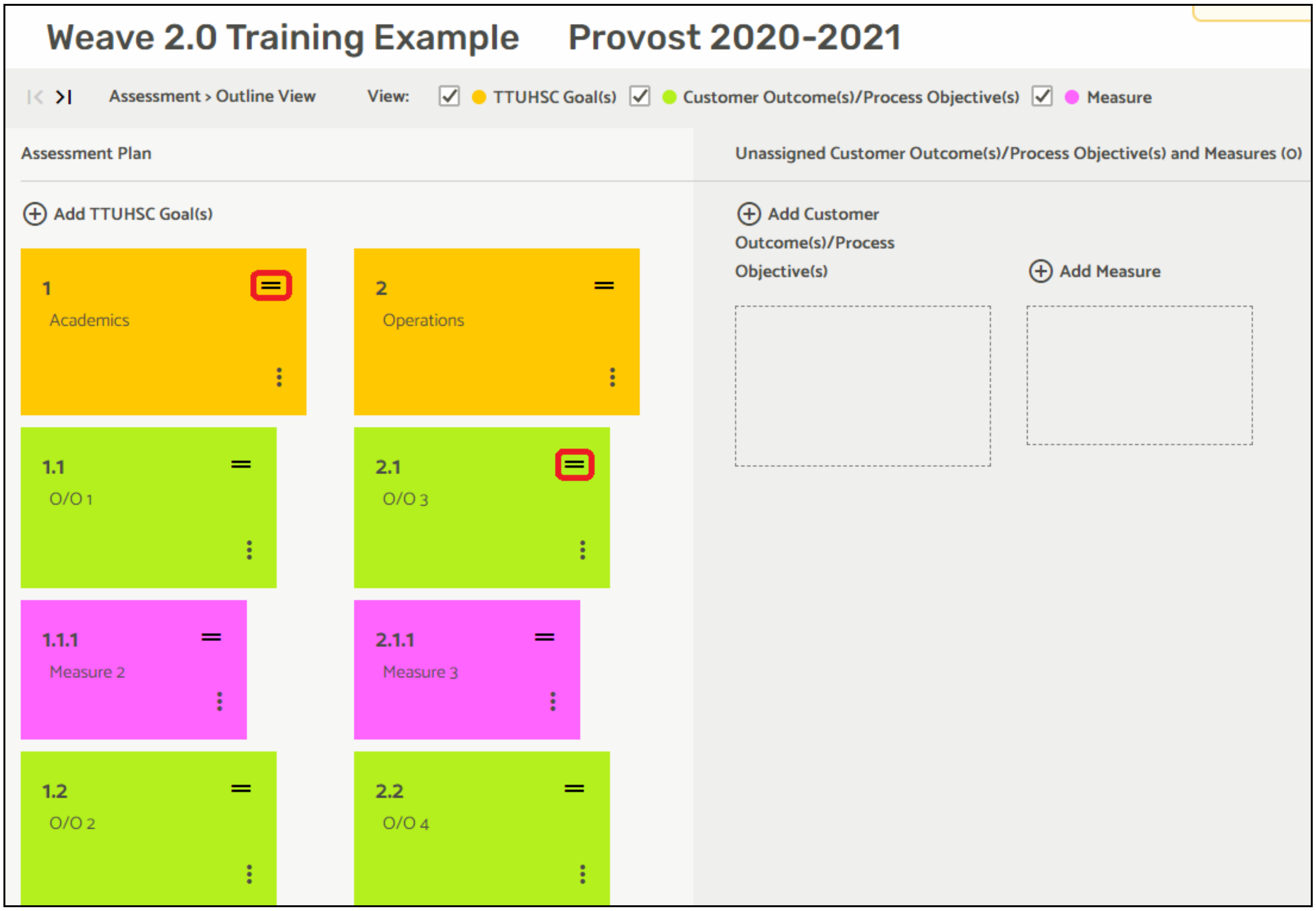
- Assessment > Outline View: Right Side of Project Screen



You can rearrange the order of your plan elements (i.e., Outcomes/Objectives, Measures, etc.) using the "Assessment > Outline View" option on the right side of your project page or by going back to the full “Assessment > Outline View” page. In the “Assessment > Outline View” on the right side of your project page, you will move your mouse over the double lines of the element you want to move and select. Then drag to the desired location. To get to the full layout of the “Assessment > Outline View”, you will click the bold arrow facing left to move the screen back into that view. You can rearrange that section the same way.

- Assessment > Outline View: Full Layout Mode

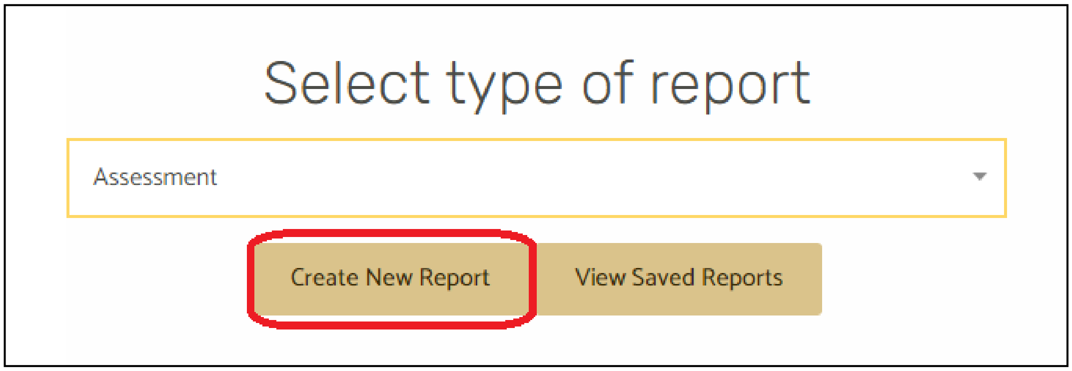
NOTE: Please disregard the section on the right, "Unassigned Customer Outcome(s)/Process Objective(s) and Measure(s) (0). As we advise that you work in the fillable portion of the plan to add in these elements.



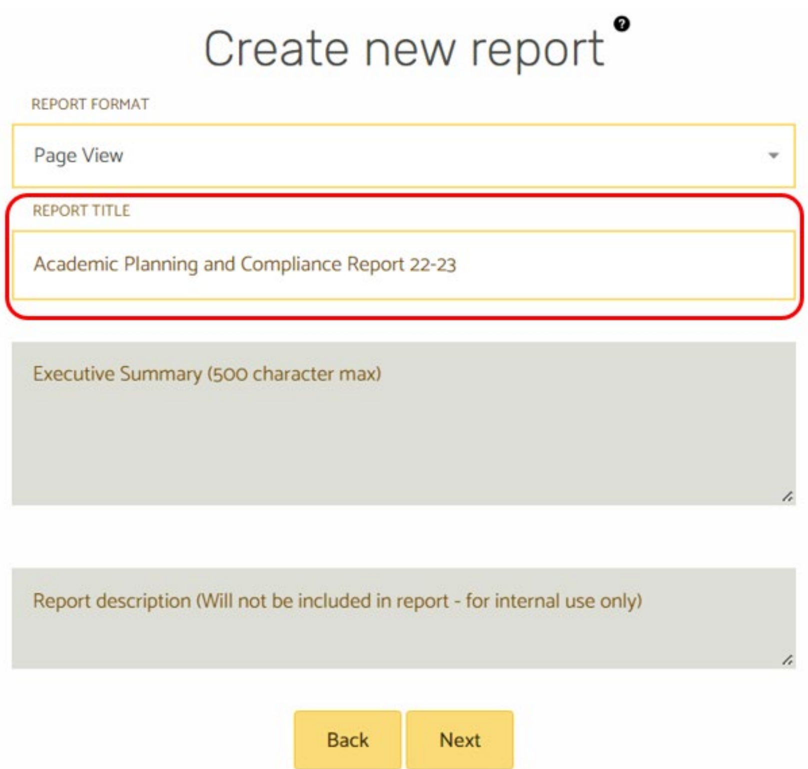
5 Downloading a Report

To download a report in Weave, you will select "Reports" at the top of the page.

You will then select "Assessment" for your type of report. Then select "Create New Report."

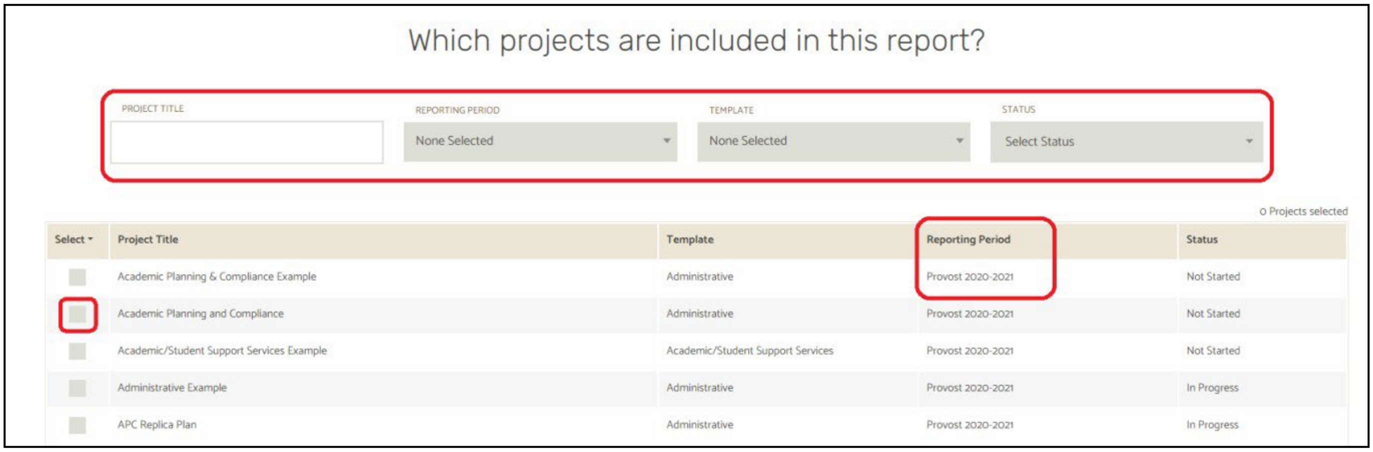


You will select "Page View" for the Report Format. Ensure that you title the report with a distinct name. The Executive Summary and Report Description sections are optional. Then select "Next."

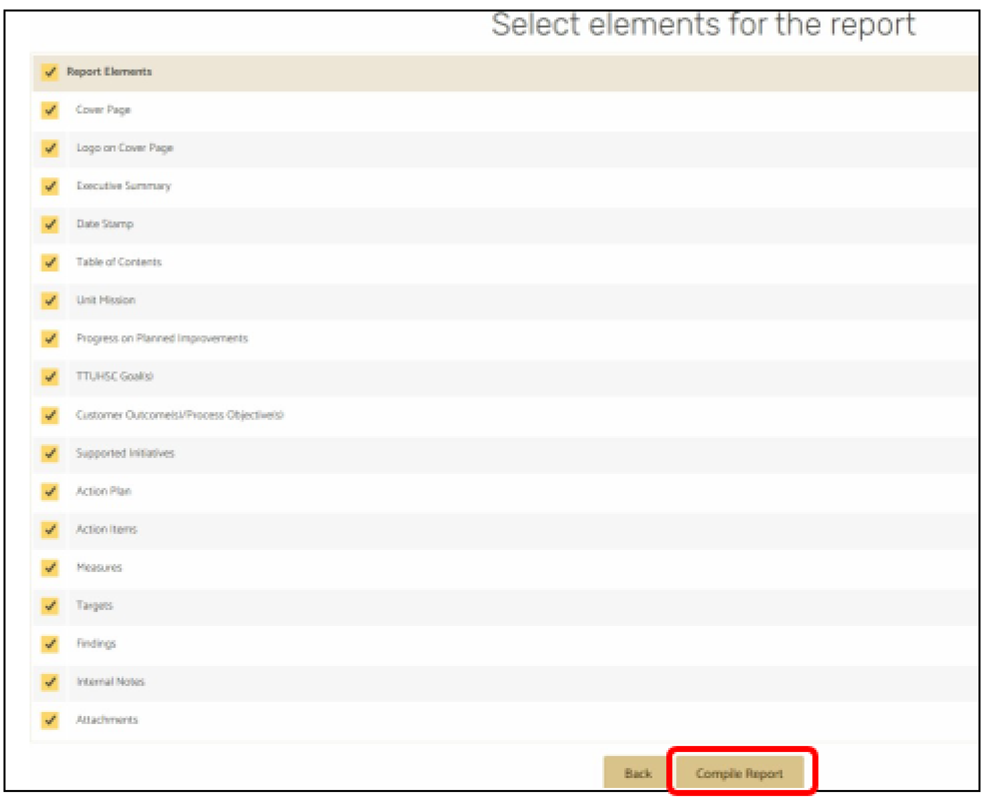


Select the plan(s) for which you would like to generate a report. You can filter for a specific project by typing in that plan's name in the "Project Title" box. You can also filter by Reporting Period, Status, or you can scroll through your list to access your specific project. Select the box next to the plan(s) for which you would like to pull a report. You can select multiple plans when pulling reports. Then select "Next."

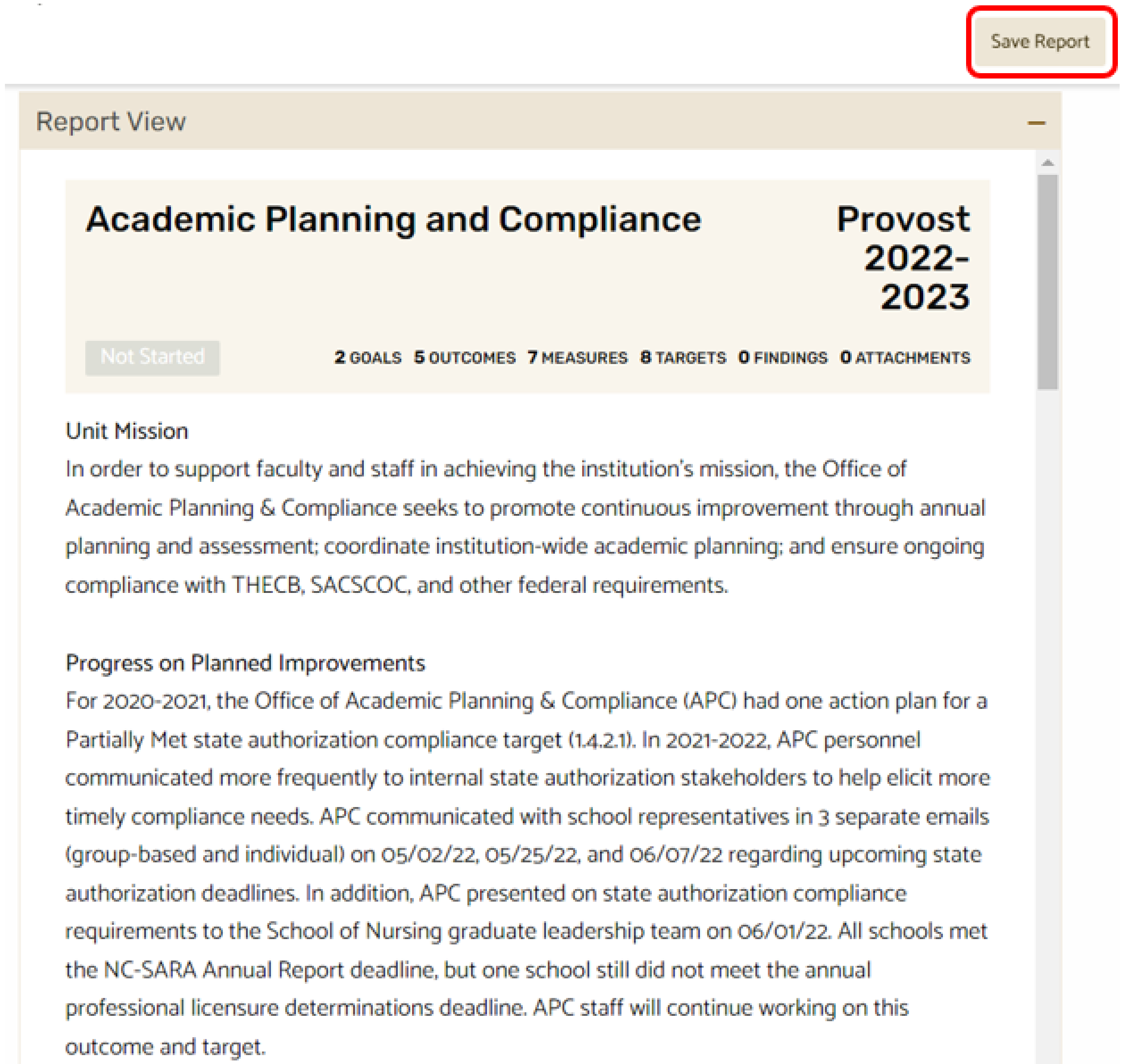
NOTE: As the years go on, your projects will increase and you will want to filter by the "Reporting Period" to ensure you are pulling the plan for the correct reporting period. You will always want to double-check that the "Reporting Period" for the plan you are going to select is the correct one you are wanting.



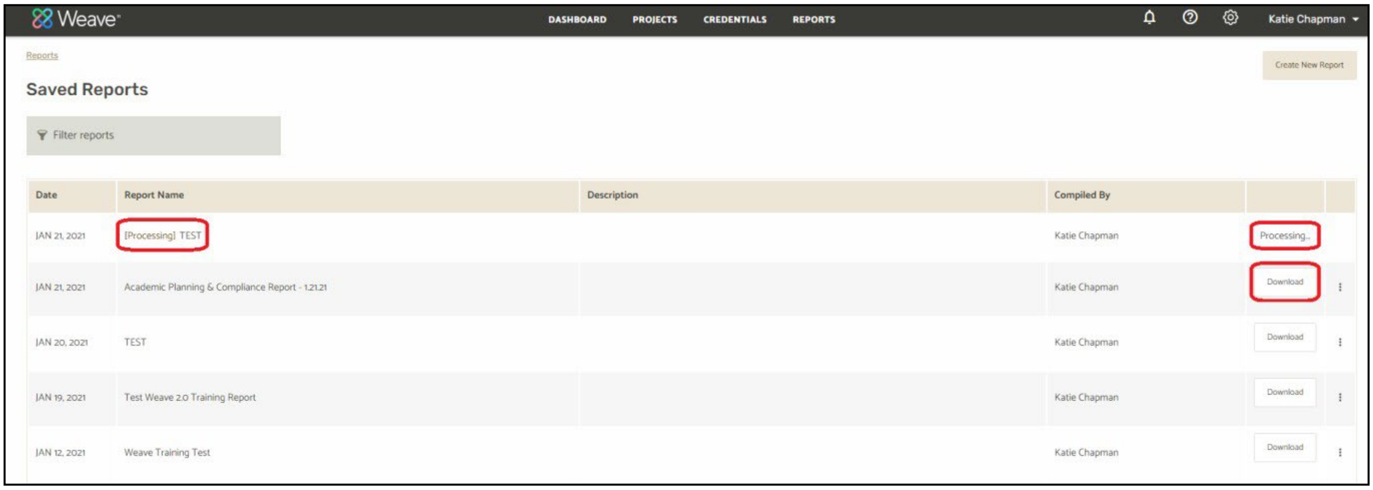
In the next page, you can uncheck any elements you would not like to see in your report. Before selecting "Compile Report," we recommend you double-check that all elements you would like to see on your report are checked.



Once you review the report on the next page, you will select "Save" and will be notified that you will receive an email once your report is complete.



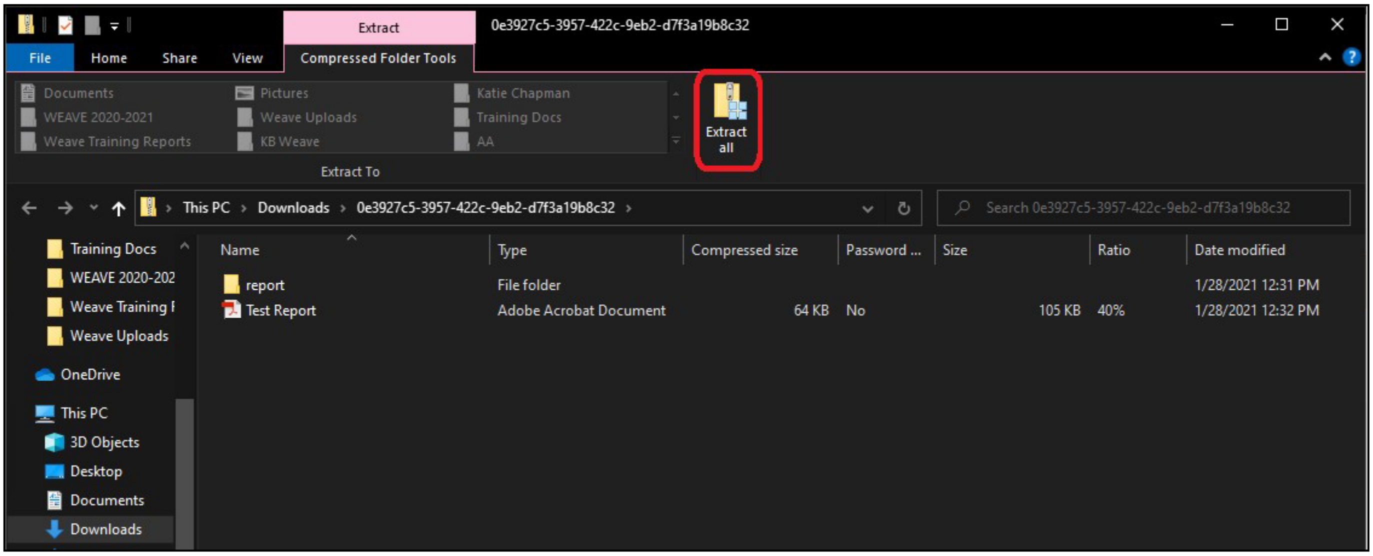
On the Saved Reports page, you will see the current report you are running indicated as "Processing," and all previous reports will have a "Download" button option for you. After processing is complete, select "Download" for the report you want to open.



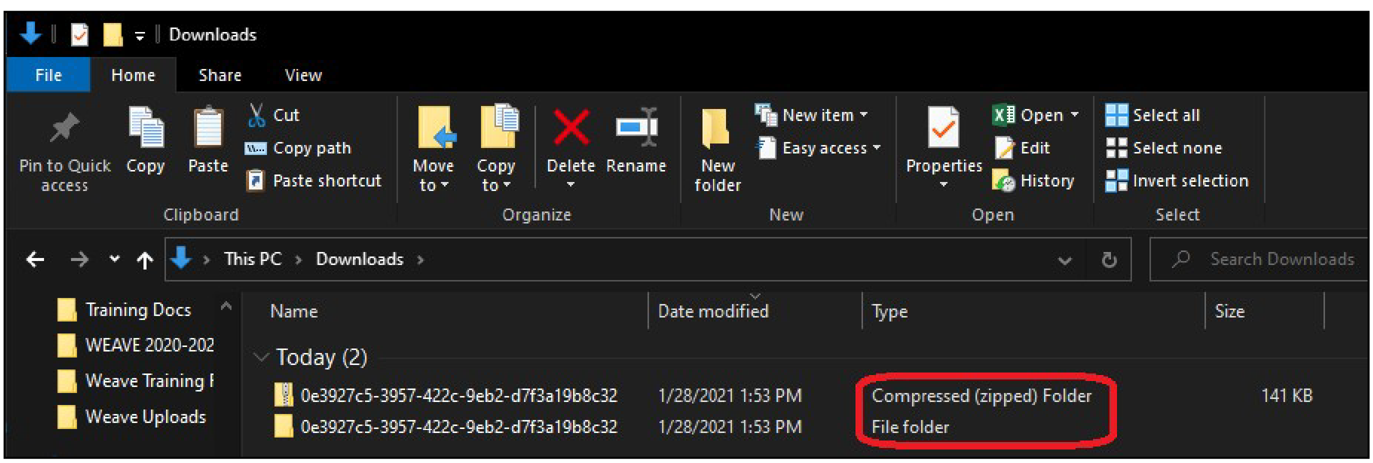
If you are downloading a report that will include "Attachments," there are a few extra steps you may need to take to access the attachments in the report.

5.1 Downloading a Report with Attachments on a PC

Select "Download" from the Weave Reports page. When the File Explorer pops opens for you to download and open the report, you will need to select "Extract all" before doing anything else. This will ensure that when the report is opened, you will also be able to open the attachments within the report.

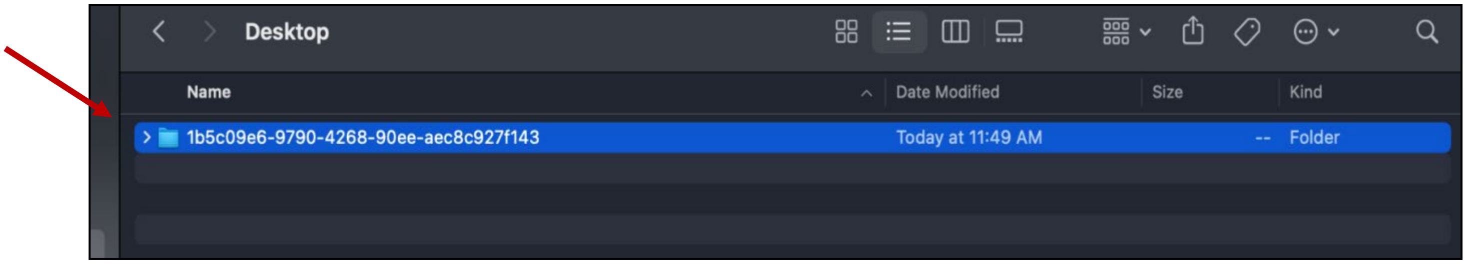


After selecting "Extract all" and a new File Explorer opens, you will then need to go to your Downloads folder. You will find the report that was just downloaded with two different types indicated: "File Folder" and "Compressed (zipped) Folder." It is important to note that you will need both of these files if you plan to share this report with anyone. The "File Folder" is the file of the report you will open on your computer and the "Compressed (zipped) Folder" is the file of the report you will share with others. You will want to copy both and paste them into the appropriate folder that you would like your report saved. You may rename the folders to match the report name.



5.2 Downloading a Report with Attachments on a Mac

Select "Download" from the Weave Reports page. To share your report with access to supporting documents, send the complete zip folder. If only the PDF of the report is sent, attachments will not open. There is no need to "Extract All" when using an Apple computer. You may rename the folder to match the report name.



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