Browser Information
The browsers currently supported and recommended by WEAVEonline are Chrome v21+, Firefox v11+ and Internet Explorer 9 & 10. Using these browsers will ensure appropriate functionality throughout the application. They are listed on the login page and you may select and download the software from the login page. (Note: We have found that using Chrome works faster and better than IE or Firefox.)

Accessing WEAVEonline
Logging In
1. Cut and paste or type the following into the address line of your browser:
2. The screen should say: “Welcome University of Texas Health Science Center at San Antonio WEAVEonline user... “. Create/edit a bookmark/favorite with this exact address before logging in.
3. Enter your WEAVEonline ID and password and click Login. (Note: Use your uthscsa username and password.)
4. Click Password Trouble? to email your WEAVEonline Administrator from this page.

Home
1. Review Local News for important information relating to the Health Science Center. The WEAVEonline News is information provided by the vendor to WEAVEonline Administrators or IMS.
2. Use the Email Admin link on the bottom left of all application pages to send an email to your WEAVEonline Administrator if needed.
3. In the Cycle and Entity Selection section, just below the navigation bar, use the dropdown boxes to select the Cycle and Entity in which you wish to work. Select Cycle 2017 (Future) and your department’s name followed by Strategic Plan. (For example: Cycle 2017 (Future) and Business Affairs Strategic Plan.)

A user will access only the following areas under the Assessment Tab to enter their department’s accomplishments.

- Benchmarks/Accomplishments – To enter accomplishments.
- Action Plan Tracking – To explain why an accomplishment was “partially met and not on target”, or was “not met”.
- Achievement Summary/Analysis – To answer five (5) Analysis Questions.

Do not make changes to Goals, Strategies, Benchmarks or Timelines.
To request changes to these measures complete the attached “Request Change(s), Additions, Deletions to Strategic Plan” form and return to the Office of Strategic Planning & Institutional Analysis for review and approval. If approved, these changes will be made by the Office of Strategic Planning.

Assessment
Entering Accomplishments
1. In the navigation bar located below the WEAVEonline logo, point to Assessment. (Note: When navigating through WEAVE do not use the browser back arrow, use the drop-down menus to move about.)
2. Select Benchmarks/Accomplishments from the dropdown menu.
3. Scroll down to Benchmarks/Timelines & Accomplishments. Expand the Benchmark for which you need to add Accomplishments by clicking the expansion triangle next to the Benchmark.
4. In the Achievement Targets and Accomplishments section, click Add Accomplishments. If accomplishments have already been reported and entered, you will click Edit Accomplishment.
5. Enter a summary of your Accomplishments using the attached “Tips for Entering Accomplishments” for cutting and pasting from Word.

The summary should be clear, concise and comprehensible. It should include accomplishments for the current reporting period (September 1, 2016 – August 31, 2017) ONLY, not prior year’s accomplishments. Provide background information on new programs or the purpose/scope of certain initiatives. Do not use acronyms; spell everything out so readers understand what you’re referring to.

6. Identify if your accomplishments indicate that your Achievement Target was Met, Partially Met, Not Met or Not Reported This Cycle. Accomplishments should only be marked “Not Reported This Cycle” if the strategy is not set to begin until a future year(s). You must enter text in the description field indicating the benchmark is not scheduled to begin until future date (To begin FY 2017). NOTE: If your benchmark spans over multiple years, you should select Partially Met. You will select Met, only when the benchmark has been accomplished.

7. Select the appropriate Entry Status (Draft/In Progress or Final). For our purposes select Final.

8. When done, click Save.

**Action Plans**
(Required ONLY for any accomplishment marked “Partially Met and Not on Target”, or “Not Met”.)

Entering an Action Plan

Please Note: Action Plans can be entered from within the Assessment > Benchmark/Accomplishments section by simply selecting the Add New Action Plan button (our recommended way), or by using the method outlined below using Action Plan Tracking from the navigation bar.

NEW! Prior action plans have been deleted. All departments are asked to create new action plans if their benchmark was “Partially Met and Not on Target” or “Not Met”.

1. In the navigation bar located below the WEAVEonline logo, point to Assessment.

2. Select Action Plan Tracking from the dropdown menu.


4. Click Add Relationships to link the Action Plan to specific Goal/Strategy/Benchmark pairs. (The system will automatically check this for you.)

5. Select the Implementation Status of the plan (Planned, In-Progress, Finished, On-Hold, or Terminated).


7. Enter the Description of your Action Plan.

8. Select a Projected Completion Date. (This is a must! We need to know what your new completion date is.)

9. Enter an Implementation Description. This will be your strategies or steps that will be taken during implementation.

10. Select a Priority from the dropdown menu (High, Medium, or Low).

11. Enter the Responsible Person/Group. This is person(s) or group(s) responsible for ensuring that this Action Plan progresses.

12. Enter any Additional Resources Needed. Provide details as to what resources are needed to complete this Action Plan.

13. Select Requested Budget Status (No Request, One Time, Recurring). (If requesting funding, complete the “Request Change(s), Additions, Deletions to Strategic Plan” form and submit for approval.)

14. Enter Budget Amount Requested if necessary.

15. Select the Established in and Active through cycles. (Leave as FY 2017 and Keep Active)

16. Select the appropriate Entry Status (Draft/In Progress or Final). (For our purposes select Final. This will trigger the approval process.)

17. When done, click Save.
Mark Benchmark as Complete

1. Select Edit Benchmark.
2. Select Entry Status: Final
3. Save. This changes the status of your benchmark from Not Yet Ready for Review to Pending Approval.

Achievement Summary/Analysis

1. In the navigation bar located below the WEAVEonline logo, point to Assessment.
2. Select Achievement Summary/Analysis from the dropdown menu.
3. In the section at the top of the page, expand (using the Expand All button or the expansion triangles) the Achievement Target Summary for an overview of actual results versus the intended Achievement Targets.
4. In the section at the bottom of the page, expand (using the Expand All button or the expansion triangles) the Analysis Questions, locate the four questions with (Strategic Planning), and click Add Answer.
5. Enter a response for the selected Analysis Question.
6. Select the appropriate Entry Status (Draft/In Progress or Final). (For our purposes select Final. This will trigger the approval process.)
7. When done, click Save.

Reports

1) In the navigation bar located below the WEAVEonline logo, point to Reports.
2) Working from left to right, Select a Cycle for which you wish to run the report. Select Cycle FY 2017 (Future).
3) Select a Report from the second column. The following report types are the most useful for the general user:
   o Full Assessment Report: The Detailed Assessment Report (DAR) generates a comprehensive summary of:
     ▪ Mission/Purpose
     ▪ Goals (if used as part of the assessment process)
     ▪ Any Associations and Related Benchmarks, Timelines, Accomplishments, and Action Plans
     ▪ Action Plan Details
     ▪ Analysis Questions and Annual Report sections are also options, if desired
   o Audit Reports: Use the Audit Reports to see if there are any specific assessment areas in need of data entry (ex. Benchmarks that Need Accomplishments). A blank audit report is optimal.
   o Data Entry Status (DES) Reports: These reports are generated from the Entry Status field at the bottom of most data entry pages. You can check your progress here.
4) Select Report Entities (entities that you want included within the report) from the third column, using one of the four options:
   o All entities to which I have access: Selecting this option will generate a report that includes all of the entities to which you have access.
   o Selected Entities: All entities to which you have access (and their parent entities) will show in this hierarchical list. Select as many entities as you would like to include in the report.
5) Once cycle, report, and entity (or entities) have been chosen, click Next.
6) Select report parameters as appropriate, and then click Run. (See attached How to Run the Detailed Assessment Report for a specific report's parameters.)
7) Please Note: You may need to allow popups from app.weaveonline.com the very first time you run reports.
Help
If you need assistance while using WEAVEonline, you may choose to:

1) Use the WEAVEonline Integrated Help System:
   o Hover over Help and choose 'Help For This Page' or 'Help Table of Contents'.
   o The former will display 'page-specific' help for the page you are viewing, while the latter will display the Help 'home page'.
   o Both options include a Table of Contents, Index, Search, Print, and Glossary capabilities.

   NOTE: If you choose to use the WEAVEonline Help be aware that the WEAVE terminology differs from the Health Science Center’s terminology. See the attached sheet Terminology for clarification.

2) Contact your campus WEAVEonline Administrator:
   o At the bottom of each page of the application there is an 'Email Admin' link. Click this link and follow the directions to send an email to your campus administrator(s).