Instructions for Accessing WEAVEonline and Entering Accomplishments

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: https://app.weaveonline.com/uthscsa/login.aspx.
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.
3. Click **Add New Action Plan.**
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).
6. Enter a **Condensed Description**. (Action Plan - Education: Goal X, Strategy X, Benchmark X)
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:
   - **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
   - **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.
   - **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:
   - **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.
   - **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:
   - Hover over and choose '**Help For This Page**' or '**Help Table of Contents**.'
   - The former will display 'page-specific' help for the page you are viewing, while the latter will display the Help 'home page.'
   - 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:
   - 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).