

# Key Functions Manager – Version 2.7

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## **Introduction**

The purpose of the Key Functions Manager is to record assessment data for college service units. Key function and process data and information are stored in the “functions” data base. Service units analyze assessment data and develop unit action plans to address needed improvements.

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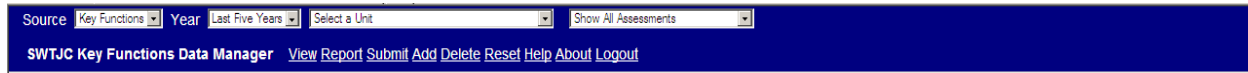
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## Navigating the Key Functions Manager Screen

After logging in, two screen areas appear. At the top of the screen is a narrow blue band.



In the upper part of the blue band are dropdown lists including the information "Source" to be managed and options to narrow the information source selection. In the lower part of the blue band are links to tasks used in managing the source item. Below the blue band is a larger work space in which management tasks are carried out.

## Key Function Assessment

Each service unit configures a set of key functions and associated processes using the Institution Manager. See Institution Manager Documentation for more information. While a service unit may have wide-ranging responsibilities and functions, **key functions** are those that directly affect student learning and/or success. In evaluating key functions and associated processes, units typically focus on:

1. **Efficiency**
2. **Effectiveness**
3. **Student Satisfaction**
4. **impact** (on student learning and success)

Other focus options can be added using the Institution Manager. See Institution Manager Documentation for more information.

For each key function assessment, an associated assessment focus is chosen. Key function assessment data is annually collected and submitted. At the beginning of the planning cycle, this assessment data are reviewed and areas needing improvement identified. Improvement strategies are planned and implemented to address the needed improvements. At the end of the planning cycle, assessment is undertaken again to evaluate the effectiveness of the strategy. The planning cycle ends when, based on this evaluation, changes are made and actions taken that result in improved student success and/or learning.

## Key Function Management Tasks

Below are the tasks associated with managing key functions.

### Adding a Key Function Assessment

Before adding a key function assessment, key functions for the service unit must be added using the Institution Manager. See Institution Manager Documentation for more information.

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Before adding a key function assessment, key functions for the service unit must be added using the Institution Manager. See Institution Manager Documentation for more information. To add a key function assessment and associated focus:

- Step 1. Launch Key Functions Manager and log in.
- Step 2. Select as source "Key Functions".
- Step 3. Select the "Year".
- Step 4. Select the "Unit".
- Step 5. Click the "Add" task.
- Step 6. For each key function desired, check one or more of the "Assessment Focus" check boxes.
- Step 7. Click "Add Key Function Assessment(s)".
- Step 8. Submit key function data if desired. See below.
- Step 9. Repeat as necessary.
- Step 10. Log out when all work is completed.

***Important Note: (1) Adding key functions requires a minimum security level of 3. (2) If the same assessment exists for the previous year, the "Assessment Method" from that year is carried forward. Otherwise, a default "Assessment Method" is used.***

### **Submitting Key Function Assessment Data**

To submit key function assessment data for an assessment previously added:

- Step 1. Launch Key Functions Manager and log in.
- Step 2. Select as source "Key Functions".
- Step 3. Select the "Year".
- Step 4. Select the "Unit".
- Step 5. To narrow the selection, select a particular focus.
- Step 6. Click the "Submit" task.
- Step 7. For each key function and focus, enter
  - a. "Beginning Measure"

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- b. "Target Measure"
- c. "Ending Measure"
- d. "Assessment Method"

Step 8. Click "Submit Key Function Assessment Data" when done.

Step 9. Repeat as necessary.

Step 10. Log out when all work is completed.

### **Deleting a Key Function Assessment**

To delete a key function assessment previously added:

- Step 1. Launch Key Functions Manager and log in.
- Step 2. Select as source "Key Functions".
- Step 3. Select the "Year".
- Step 4. Select the "Unit".
- Step 5. To narrow the selection, select a particular focus.
- Step 6. Click the "Delete" task.
- Step 7. Select the key function assessment and focus to delete.
- Step 8. Confirm the key function assessment to delete.
- Step 9. Click "Delete Key Function Assessment" if confirmed.
- Step 10. Repeat as necessary.
- Step 11. Log out when all work is completed.

***Important Note: Deleting key functions requires a minimum security level of 4.***

### **Viewing Key function Assessment Data**

Key functions can be viewed at any time by clicking the "View" task. Two viewing formats are available. The first is a trend report that displays key function assessment data by year for the past five years. The second is a detailed key function assessment report for a given year. The view options are further explained below.

#### **Viewing Key function Assessment Data – Five Year Trend Report**

To view the trend report, follow these steps:

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- Step 1. Launch Key Functions Manager and log in.
- Step 2. Select as source “Key functions”.
- Step 3. Select "Last Five Years" as the "Year".
- Step 4. Select a "Unit".
- Step 5. The *Key functions Five Year Report* will display.
- Step 6. Repeat as desired for other units.
- Step 7. Log out when all work is completed.

### **Viewing Key function Assessment Data - Annual Report**

To view an annual report, follow these steps:

- Step 1. Launch Key Functions Manager and log in.
- Step 2. Select as source “Key functions”.
- Step 3. Select a "Year".
- Step 4. Select a "Unit".
- Step 5. The annual report will display.
- Step 6. Repeat as desired for other units and/or years.
- Step 7. Log out when all work is completed.

### **Reset (Key Function Assessments) Task**

The "Reset" task allows all key function assessments for a unit in a given year to be deleted at once. The "Reset" task requires a minimum security level of 6.

To delete all key function assessments for a given unit and year, follow these steps:

- Step 1. Launch Key Functions Manager and log in.
- Step 2. Select as source “Key functions”.
- Step 3. Select a "Year".
- Step 4. Select a "Unit".
- Step 5. Click the "Reset" task.
- Step 6. Confirm the key function assessments to be deleted.

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- Step 7. Click "Delete All Key Function Assessments" if confirmed.
- Step 8. Repeat as desired for other units and/or years.
- Step 9. Log out when all work is completed.

### **Process Assessment**

Each service unit configures a set of key functions and associated processes using the Institution Manager. See Institution Manager Documentation for more information. While areas of improvement are often identified at the key function level, improvement strategies are usually implemented at the process level. For this reason, process assessment is necessary.

In evaluating processes, units typically focus on:

- 5. *Efficiency*
- 6. *Effectiveness*
- 7. *Student Satisfaction*
- 8. *Impact* (on student learning and success)

Other focus options can be added using the Institution Manager. See Institution Manager Documentation for more information. For each process, an associated assessment focus is chosen. Process assessment data is collected annually and submitted. At the beginning of the planning cycle, assessment data are reviewed and areas needing improvement are identified. Improvement strategies are planned and implemented to address the needed improvements. At the end of the planning cycle, assessment is undertaken again to evaluate the effectiveness of the strategy. The planning cycle ends when, based on this evaluation, changes are made and actions taken that result in improved student success and/or learning.

### **Process Management Tasks**

Below are the tasks associated with managing key function processes.

#### **Adding a Process Assessment**

To add a new process assessment:

- Step 1. Launch Key Functions Manager and log in.
- Step 2. Select as source "Processes".
- Step 3. Select the "Year".
- Step 4. Select the "Unit".

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- Step 5. Click the "Add" task.
- Step 6. Select a "Key Function".
- Step 7. For each process desired, check one or more of the "Assessment Focus" check boxes.
- Step 8. Click "Add Process Assessment(s)".
- Step 9. Submit process assessment data if desired. See below.
- Step 10. Repeat as necessary.
- Step 11. Log out when all work is completed.

***Important Note: (1) Adding processes requires a minimum security level of 3. (2) If the same assessment exists for the previous year, the "Assessment Method" from that year is used. Otherwise, a default "Assessment Method" is used.***

### **Submitting Process Assessment Data**

To submit process assessment data for an assessment previously added:

- Step 1. Launch Key Functions Manager and log in.
- Step 2. Select as source "Processes".
- Step 3. Select the "Year".
- Step 4. Select the "Unit".
- Step 5. To narrow the selection, select a particular focus.
- Step 6. Click the "Submit" task.
- Step 7. For each key function ,process, and focus, enter
  - a. "Beginning Measure"
  - b. "Target Measure"
  - c. "Ending Measure"
  - d. "Assessment Method"
- Step 8. Click "Submit Process Assessment Data" when done.
- Step 9. Repeat as necessary.
- Step 10. Log out when all work is completed.

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### Deleting a Process Assessment

To delete a process assessment for an assessment previously added:

- Step 1. Launch Key Functions Manager and log in.
- Step 2. Select as source "Processes".
- Step 3. Select the "Year".
- Step 4. Select the "Unit".
- Step 5. To narrow the selection, select a particular focus.
- Step 6. Click the "Delete" task.
- Step 7. Select the key function.
- Step 8. Select the process assessment to delete.
- Step 9. Confirm the process to delete.
- Step 10. Click "Delete Process Assessment" if confirmed.
- Step 11. Repeat as necessary.
- Step 12. Log out when all work is completed.

***Important Note: Deleting processes requires a minimum security level of 4.***

### Viewing Process Assessment Data

Key function processes can be viewed at any time by clicking the "View" task. Two viewing formats are available. The first is a trend report that displays process assessment data by key function and year for the past five years. The second is a detailed process assessment report for each key function and a given year. The view options are further explained below.

#### **Viewing Process Assessment Data – Five Year Trend Report**

To view this trend report, follow these steps:

- Step 1. Launch Key Functions Manager and log in.
- Step 2. Select as source "Processes".
- Step 3. Select "Last Five Years" as the "Year".
- Step 4. Select a "Unit".
- Step 5. The *Key function Processes Five Year Trend Report* will display.

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Step 6. Repeat as desired for other units.

Step 7. Log out when all work is completed.

### **Viewing Process Assessment Data - Annual Report**

To view an annual report, follow these steps:

Step 1. Launch Key Functions Manager and log in.

Step 2. Select as source "Processes".

Step 3. Select a "Year".

Step 4. Select a "Unit".

Step 5. The annual report will display.

Step 6. Repeat as desired for other units and/or years.

Step 7. Log out when all work is completed.

### **Other Management Tasks**

#### **Help Task**

The "Help" task provides a brief summary of the basic features of the Key Functions Manager.

#### **Logout Task**

Always log out when all work is done.