Institution Information Manager – Version 2.7

The purpose of the Institution Information Manger is to manage information used by other WhippleWare modules. Institutional information is stored in the "institution.mdb" Microsoft Access data base.

After logging in, two screen areas appear. At the top of the screen is a narrow blue band. Below that is a larger work area. In the upper part of the blue band is a dropdown list from which to select the information "Source" to be managed. In the lower part of the blue band are links to a series of tasks used in management of the source item. Commonly used management tasks include:

"View" Task

The "View" task can be clicked anytime to display a summary of the "Source" information. For some sources, the column heading is a link that can be clicked to sort the information on the chosen column. The "Active" column heading is a link that can be clicked to display all records both active and inactive. The column heading "All" that will then appear can be clicked to display only active records. See the source "Planning Units" as an example. Some sources have a button labeled "Convert to Excel Worksheet". When clicked, the displayed data is converted to a worksheet that can be saved. See the source "User Information" as an example.

"Report" Task

The "Report" task is used to display a more printer friendly report of source items. See "Strategic Goals" as an example. Certain sources when viewed contain a "Report All" link that displays a printer friendly report of all items for the selected source. See "User Information" as an example. To print the report, right click any place in the report, choose the "Print…" option, and follow directions.

"Modify" Task

The "Modify" task can be clicked to modify an existing source item
.
"Add" Task

The "Add" task can be clicked to add a new source item.

"Delete" Task

The "Delete" task can be clicked to delete an existing source item.

"Help" Task

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

"Logout" Task

Always log out when all work in done.

Source items include the following:

College General Information

College Strategic Goals

College Organizational Structure

User Information

College Years

Planning Units

Unit Planning Type

Planning Other Links

Instructional Programs

Instructional Program Outcomes

Course Outcome Links to Program Outcomes

Course Rubrics

Course Assessment Defaults

Syllabus Policies

Service Key Functions

Service Key Function Process

Assessment Focus

Information Source Items

College General Information

The college information record consists of these items:

1. "College Name" – ***Enter the college's complete name.***
2. "Abbreviation" – ***Enter the college's official abbreviation.***
3. "Address 1" – ***Enter the first line of the college's official address.***
4. "Address 2" – ***Enter the second line of the college's official address (optional).***
5. "City, State, ZIP" – ***Enter the college's city, state, and ZIP code.***
6. "Abbreviation" – ***Enter the college's official abbreviation.***
7. "Webpage" ***– Enter the college's official webpage.***
8. "Tracking Email" ***– Enter the email of the individual who will receive copies of all email sent by the submitter, reviewer, and approver of planning outcomes doing their work .***
9. "System Lock" ***– Check this box to prevent login of module during maintenance.***
10. "System Lock Message" ***– Enter the message that users will receive when trying to log-in when the system is locked.***
11. "Delete Control (Planning)" ***– For planning and assessment, deleting records can be restricted to users of a minimum security level. If a user below that level attempts to delete a record, an error message is generated that includes a referral.***
12. "Delete Control (Syllabus)" ***–Deleting class syllabi can be restricted to users of a minimum security level. If a user below that level attempts to delete a record, an error message is generated that includes a referral.***
13. "Year Lock (Planning)" – ***College years for assessment and planning can be locked to prevent entering and changing information. If a user attempts to use a locked year, an error message is generated that includes a referral.***
14. Year Lock (Planning)" – ***College years for syllabi can be locked to prevent entering and changing information. If a user attempts to use a locked year, an error message is generated that includes a referral.***
15. "Referral" – ***Enter the referral (person or office) that a user should contact if denied the ability to delete a planning or assessment record.***

    The next items assume the college has a mission statement, a set of fundamental goals (maximum 5) to achieve the mission, and a set of strategic goals (maximum 10) associated with the college's strategic plan. The mission statement is presumed to change rarely; however, the fundamental and strategic goals may change in time and are each associated with a range of years.

16. Mission Information: The College's mission statement is split into logical sections that make it easier for college units to select an appropriate mission link in unit action plans.

17. "Mission Item 1" – ***Enter the number of the first mission section.***

18. "Mission Short Name" – *__Enter a shortened name for the first mission section.__*
19. "Mission Description" – *__Enter a complete description for the first mission section.__*

    Repeat for up to five mission items.

20. Fundamental Goal Information: The College's fundamental goal statements are entered separately so that units can select an appropriate link in unit action plans.

21. "Goal No." – *__Enter the number of the College's first goal statement.__*
22. "Goal Short Name" – *__Enter a shortened name for the first goal statement.__*
23. "Goal Description" – *__Enter a complete description for the goal statement.__*

    Repeat for up to ten fundamental goal statements.
    __Important Note: Goals must first be set-up by the database manager directly in the database table, after which, the wording can be changed using the Institution Manager. See below.__

To modify program college general information:

Step 1.   Launch WW Institution Manager and log in.

Step 2.   Select as source "College Information".

Step 3.   Click "Modify" task.

Step 4.   Make any changes.

Step 5.   Click "Save College Information" when done.

Step 6.   Log out when all work is completed.

__Important Note: The "Add" and "Delete" tasks are not available for College General Information.__

College Strategic Goals

Since the duration and number of strategic goals can vary widely, their management is more flexible than fundamental goals. Strategic goals can be added, modified, and deleted as necessary. The strategic goal record consists of these items:

1. "Number" – *__Enter the number of the strategic goal.__*
2. "First Year" – *__Enter the first year the strategic goal will be effective.__*
3. "Last Year" – *__Enter the last year the strategic goal will be effective.__*
4. "Short name" – *__Enter the short name for the strategic goal.__*
5. "Description" – *__Enter the description for the strategic goal.__*
6. "Active" – *__Click to check if the strategic goal is active.__*

To add a strategic goal:

Step 1.   Launch WW Institution Manager and log in.

Step 2.   Select as source "Strategic Goals".

Step 3.   Click "Add" task.

Step 4.   Enter the required information.

Step 5.   Click "Add Strategic Goal" when done.

Step 6.   Log out when all work is completed.

Important Note: For each "Number", the year range ("First Year" to "Last Year") must not overlap. In other words, it is quite reasonable to have number 1 strategic goals each covering different range of years.

To modify a strategic goal:

Step 1.   Launch WW Institution Manager and log in.

Step 2.   Select as source "Strategic Goals".

Step 3.   Click "Modify" task.

Step 4.   Click to select a "Strategic Goal" to modify.

Step 5.   Make any changes.

Step 6.   Click "Save Strategic Goal" when done.

Step 7.   Log out when all work is completed.

To delete a strategic goal:

Step 8.   Launch WW Institution Manager and log in.

Step 9.   Select as source "Strategic Goals".

Step 10.   Click "Delete" task.

Step 11.   Click to select a "Strategic Goal" to delete.

Step 12.   Confirm this is the Strategic Goal to delete.

Step 13.   Click "Delete Strategic Goal" when done.

Step 14.   Log out when all work is completed.

Institution Information Manager – Version 2.7

Important Note: A strategic goal should not be deleted if it has been used by any other WhippleWare application. The safest thing to do is deactivate it by un-checking the "Active" field using the "Modify" task.

College Organizational Structure

The next five information items address the College's organizational levels from the "Governance" (highest) to "Department" (lowest). Each level is assumed to report to the level immediately above. The number of items within a structural level is not limited. The organization levels are as follows:

Governance Level

1. "Governance Level" – ***Enter an entity at the governance level. E.g. Board of Trustees***

Executive Information

1. "Executive Level" – ***Enter an entity at the executive level. E.g. President***
2. "Governance Level" – ***Select the governance entity to which this entity reports.***

Administration Information

1. "Administration Level" – ***Enter an entity at the administration level. E.g. Vice President Academics***
2. "Executive Level" – ***Select the executive entity to which this entity reports.***

Division Information

1. "Division Level" – ***Enter an entity at the division level. E.g. Math and Science Dean***
2. "Administration Level" – ***Select the administration entity to which this entity reports.***

Department Information

1. "Department Level" – ***Enter an entity at the department level. E.g. Biology***
2. "Division Level" – ***Select the division entity to which this entity reports.***
3. "Type" – ***Select the department type, either "Instruction" or "Service".***

The management of these levels is identical and depends on the selection in the "Source" dropdown box.

To add an entity at a level:

Step 1.   Launch WW Institution Manager and log in.

Step 2.   Select as the level as source.

Step 3.   Click "Add" task.

Step 4.   Enter the required information.

Step 5.   Click "Add … Entity" when done.

Step 6.   Log out when all work is completed.

To modify an entity at a level:

Step 15.   Launch WW Institution Manager and log in.

Step 16.   Select as the level as source.

Step 17.   Click "Modify" task.

Step 18.   Click to select a "… Entity" to modify.

Step 19.   Make any changes.

Step 20.   Click "Save … Entity" when done.

Step 21.   Log out when all work is completed.

To delete an entity at a level:

Step 22.   Launch WW Institution Manager and log in.

Step 23.   Select as the level as source.

Step 24.   Click "Delete" task.

Step 25.   Click to select a "… Entity" to delete.

Step 26.   Confirm this is the entity to delete.

Step 27.   Click "Delete … Entity" when done.

Step 28.   Log out when all work is completed.

User Information

A "guest" user account is provided for anyone to view information. To manage information, a password protected user must be created. Each user account consists of the following fields:

1.   "Full Name" – *Enter user's full name.*
2.   "Title" – *Enter the user's title.*
3.   "Active" – *Check if the user is active.*
4.   "Office" – *Enter the user's office address (building and room number)*
5.   "Voice Phone" – *Enter the user's voice phone number.*
6.   "Fax Phone" – *Enter the user's fax phone number.*
7.   "Email Address" – *Enter the user's email address.*

8. "College Address 1" – ***Enter the first line of the user's college address (defaults to official college "Address 1" above).***

9. "College Address 2" – ***Enter the second line of the user's college address (defaults to official college "Address 2" above).***

10. "College City, State ZIP" – ***Enter the College's city, state, and ZIP code (defaults to official college city, state, and ZIP code above).***

11. "Planning Unit" – ***Select the planning unit to which the user belongs.***

12. "Organization Level" – ***Select the organization level to which the user belongs.***

13. "Security Level" – ***Enter the user's security level.*** Note: Security levels range from 0 to 6 and control various aspects of user access to information and data. While a user may be assigned any level, the table below gives suggested assignments.

Level	Access
0	Guest
1	Part-time faculty and staff
2	Full-time faculty and staff
3	Department level supervisors
4	Division level supervisors
5	Administrative level and above
6	Database administrator

14. "Password" – ***Enter the user's password.***

15. "Additional Teaching Rubrics"– ***Enter one or more rubrics (separated by commas) in teaching areas outside the user's department. E.g. A user in the Government Department also is qualified to teach history (HIST) and philosophy (PHIL). The entry would be "HIST,PHIL".***

16. "Full-Time Faculty"– ***Check if the user is full-time faculty.***

To add a user:

Step 1.   Launch WW Institution Manager and log in.

Step 2.   Select "User Information" as source.

Step 3.   Click "Add" task.

Step 4.   Enter the required information.

Step 5.   Click "Add New User" when done.

Step 6.   Log out when all work is completed.

To modify user information:

Step 1.   Launch WW Institution Manager and log in.

Step 2.   Select "User Information" as source.

Step 3.   Click "Modify" task.

Step 4.   Click to select a user to modify.

Step 5.   Make any changes.

Step 6.   Click "Save User Information" when done.

Step 7.   Log out when all work is completed.

To delete a user:

Step 1.   Launch WW Institution Manager and log in.

Step 2.   Select "User Information" as source.

Step 3.   Click "Delete" task.

Step 4.   Click to select a user to delete.

Step 5.   Confirm this is the user to delete.

Step 6.   Click "Delete Existing User" when confirmed.

Step 7.   Log out when all work is completed.

Important Note: A user should not be deleted if he/she has been used by any other WhippleWare application. The safest thing to do is deactivate it by un-checking the "Active" field using the "Modify" task.

College Years

Most institutional records are associated with a particular college year.   Depending on college policy, past and future data records may be restricted ("locked") for viewing purposes only. Each year record consists of the following fields:

1. "Year" – ***Enter the first year of the college year. E.g. 2008***
2. "Description" – ***Enter a brief description. E.g. 2008-2008***
3. "Year View" – ***Check if the year is to appear in the "Year" drop down list.***
4. "Year Lock" – ***Check if access to that year's records are restricted to viewing only.***

To add a year:

Step 1.   Launch WW Institution Manager and log in.

Step 2.   Select "Years" as source.

Step 3.   Click "Add" task.

Step 4.   Enter the required information.

Step 5.   Click "Add New Year" when done.

Step 6.   Log out when all work is completed.

To modify a year:

Step 1.   Launch WW Institution Manager and log in.

Step 2.   Select "Years" as source.

Step 3.   Click "Modify" task.

Step 4.   Click to select a year to modify.

Step 5.   Make any changes.

Step 6.   Click "Save Year" when done.

Step 7.   Log out when all work is completed.

To delete a year:

Step 1.   Launch WW Institution Manager and log in.

Step 2.   Select "Year" as source.

Step 3.   Click "Delete" task.

Step 4.   Click to select a year to delete.

Step 5.   Confirm this is the year to delete.

Step 6.   Click "Delete Existing Year" when confirmed.

Step 7.   Log out when all work is completed.

Important Note: A year should not be deleted if it has been used by any other WhippleWare application. The safest thing to do is deactivate it by un-checking the "Year View" field using the "Modify" task.

Planning Units

Each college unit that creates a unit action plan must be identified and added. The number of planning units is not limited. Each planning unit record consists of the following fields:

1. "Unit Name" – ***Enter unit's name.***

2. "Unit Type" – *Select unit's type, either "Instruction" or "Service".*
3. "Department" – *Select the department to which the unit belongs .*
4. "Active" – *Check if the department is active.*
5. "Submitted By" – *Select the user who will be responsible for submitting the unit action plan.*
6. "Reviewed By" – *Select the user who will be responsible for reviewing the unit action plan.*
7. "Approved By" – *Select the user who will be responsible for approving the unit action plan.*
   Important Note: This user will also have budget approval authority for the unit action plan.
8. "Default Program" – *Select unit's default program.*
   Important Note: Generally only instruction units are associated with programs. When the instruction unit creates a unit action plan, each planning outcome must be linked to a program. This selection determines the default program that first appears.
9. "Default Purpose" – *Enter the unit's purpose statement as it will appear in the unit action plan.*

To add a planning unit:

Step 1.   Launch WW Institution Manager and log in.

Step 2.   Select "Planning Units" as source.

Step 3.   Click "Add" task.

Step 4.   Enter the required information.

Step 5.   Click "Add New Planning Unit" when done.

Step 6.   Log out when all work is completed.

To modify a planning unit:

Step 1.   Launch WW Institution Manager and log in.

Step 2.   Select "Planning Units" as source.

Step 3.   Click "Modify" task.

Step 4.   Click to select a planning unit to modify.

Step 5.   Make any changes.

Step 6.   Click "Save Planning Unit" when done.

Step 7.   Log out when all work is completed.

To delete a planning unit:

Step 1.   Launch WW Institution Manager and log in.

Step 2.   Select "Planning Units" as source.

Step 3.   Click "Delete" task.

Step 4.   Click to select a planning unit to delete.

Step 5.   Confirm this is the planning unit to delete.

Step 6.   Click "Delete Existing Planning Unit" when confirmed.

Step 7.   Log out when all work is completed.

Important Note: A planning unit should not be deleted if it has been used by any other WhippleWare application. The safest thing to do is deactivate it by un-checking the "Active" field using the "Modify" task.

Unit Planning Type

Planning usually falls under one of three categories; namely, instructional (directly related to student learning), operational (little or no relation to student learning), or student support (in support of student learning). Because the College's mission is focused on student learning, instructional and student support planning should predominate, but operational planning is not discouraged.   The number of planning types is not limited. Each unit planning type record consists of the following fields:

1. "No." – ***Enter planning type number.***
2. "Short Name" – ***Enter a short name for the planning type.***
3. "Description" – ***Enter a full description of the planning type.***
4. "Active" – ***Check if unit planning type is active.***

To add a planning type:

Step 1.   Launch WW Institution Manager and log in.

Step 2.   Select "Planning Types" as source.

Step 3.   Click "Add" task.

Step 4.   Enter the required information.

Step 5.   Click "Add New Planning Type" when done.

Step 6.   Log out when all work is completed.

To modify a planning unit:

Step 1.   Launch WW Institution Manager and log in.

Step 2.   Select "Planning Types" as source.

Step 3.   Click "Modify" task.

Step 4.   Click to select a planning type to modify.

Step 5.   Make any changes.

Step 6.   Click "Save Planning Type" when done.

Step 7.   Log out when all work is completed.

To delete a planning unit:

Step 1.   Launch WW Institution Manager and log in.

Step 2.   Select "Planning Types" as source.

Step 3.   Click "Delete" task.

Step 4.   Click to select a planning type to delete.

Step 5.   Confirm this is the planning type to delete.

Step 6.   Click "Delete Existing Planning Type" when confirmed.

Step 7.   Log out when all work is completed.

Important Note: A planning type should not be deleted if it has been used by any other WhippleWare application. The safest thing to do is deactivate it by un-checking the "Active" field using the "Modify" task.

Unit Planning Other Links

Besides the required links (mission, vision, etc.) in unit action plans, it is useful to identify up to eight other planning links associated with college initiatives and projects. When these are checked in unit action plans, they can be selected in queries for special reporting. Each unit planning other link record consists of the following fields:

1. "Item No." – ***Enter the other planning other link number.***
2. "Short Name" – ***Enter a short name for the other planning other link.***
3. "Description" – Enter a full description for the other planning other link.
4. "Active" – Check if unit planning other link is active.
   Important Note: Repeat for up to eight other planning links, which must be numbered 1 to 8.

To add a planning other link:

Step 1.   Launch WW Institution Manager and log in.

Step 2.   Select "Planning Other Links" as source.

Step 3.   Click "Add" task.

Step 4.   Enter the required information.

Step 5.   Click "Add New Planning Other Link " when done.

Step 6.   Log out when all work is completed.

To modify a planning other link:

Step 1.   Launch WW Institution Manager and log in.

Step 2.   Select "Planning Other Links" as source.

Step 3.   Click "Modify" task.

Step 4.   Click to select a planning other link to modify.

Step 5.   Make any changes.

Step 6.   Click "Save Planning Other Link" when done.

Step 7.   Log out when all work is completed.

To delete a planning other link:

Step 1.   Launch WW Institution Manager and log in.

Step 2.   Select "Planning Other Links" as source.

Step 3.   Click "Delete" task.

Step 4.   Click to select a planning other link to delete.

Step 5.   Confirm this is the planning other link to delete.

Step 6.   Click "Delete Existing Planning Other Link" when confirmed.

Step 7.   Log out when all work is completed.

Important Note: A planning other link should not be deleted if it has been used by any other WhippleWare application. The safest thing to do is deactivate it by un-checking the "Active" field using the "Modify" task.

Instructional Programs

Instructional programs are fundamental to curricular design. Instructional units link their unit action plans to a program and, in turn, to a specific program outcome. The number of instructional programs is

not limited. The college abbreviation (e.g. "WTC"), if used, is reserved as a college-wide program.   As a system option, college-wide program outcomes can be automatically included with the program's outcomes to form a complete set. See below. Each instructional program record consists of the following fields:

1. "Instructional Program Name" – *Enter the instructional program name.*
2. "Unit" – *Select the planning associated with the program.*
3. "Coordinator" – *Select the coordinator of the program.*
4. "Active" – Check if program is active.
5. "College-Wide Outcome Links" – *Select one or more college-wide program outcomes to associate with this program.*

To add an instructional program:

Step 7.   Launch WW Institution Manager and log in.

Step 8.   Select "Programs" as source.

Step 9.   Click "Add" task.

Step 10.   Enter the required information.

Step 11.   Click "Add New Program" when done.

Step 12.   Log out when all work is completed.

To modify an instructional program:

Step 1.   Launch WW Institution Manager and log in.

Step 2.   Select "Programs" as source.

Step 3.   Click "Modify" task.

Step 4.   Click to select a instructional program to modify.

Step 5.   Make any changes.

Step 6.   Click "Save Instructional Program" when done.

Step 7.   Log out when all work is completed.

To delete an instructional program:

Step 1.   Launch WW Institution Manager and log in.

Step 2.   Select "Programs" as source.

Step 3.   Click "Delete" task.

Step 4.   Click to select an instructional program to delete.

Step 5.   Confirm this is the instructional program to delete.

Step 6.   Click "Delete Existing Instructional Program" when confirmed.

Step 7.   Log out when all work is completed.

Important Note: An instructional program should not be deleted if it has been used by any other WhippleWare application. The safest thing to do is deactivate it by un-checking the "Active" field using the "Modify" task.

Instructional Program Outcomes

Associated with each instructional program are program outcomes. Unit action plans link to these program outcomes. As a system option, college-wide program outcomes will automatically be included with a program's outcomes to form a complete set. Each program outcome record consists of the following fields:

1. "No." – *Enter the program outcome number.*
   Important Note: Program outcome numbers should start at one and be numbered consecutively. To avoid duplication, institution-wide outcomes should start at a suitably higher number (e.g. "10" or "100").
2. "Description" – *Enter a description of the program outcome.*
3. "Active" - *Check if program outcome active.*
4. "Course(s) Where Program Outcome Taught" – *Select course(s) where the program outcome is taught; i.e., introduced, reinforced, and/or applied.*
   Important Note: A set of course outcomes must exist in the master template for each course selected.
5. "Course(s) Where Program Outcome Assessed" – *Select course(s) where the program outcome is assessed.*
   Important Note: (1) Instructional program assessment can be linked beyond the program outcome level to courses and further still to specific sections. (2) In the Outcomes Manager, a "Program Outcome to Course Crosswalk" report displays the courses in items 4 and 5 above cross linked to program outcomes.   Such a report if often referred to as a "Curriculum Map" or "Curriculum Planning Matrix".
6. "Default Assessment Method" – *Enter the default assessment method for the program outcome.*
   Important Note: In the Outcomes Manager, the default assessment method is used if an assessment method does not exist for the previous year's assessment.
7. "Default Assessment Target" – *Enter the default assessment target for the program outcome.*

Important Note: In the Outcomes Manager, the default assessment target is used if an assessment target does not exist for the previous year's assessment.

To add an instructional program outcome:

Step 13.   Launch WW Institution Manager and log in.

Step 14.   Select "Program Outcomes" as source.

Step 15.   Click "Add" task.

Step 16.   Enter the required information.

Step 17.   Click "Add New Program Outcome" when done.

Step 18.   Log out when all work is completed.

To modify an instructional program outcome:

Step 1.   Launch WW Institution Manager and log in.

Step 2.   Select "Program Outcomes" as source.

Step 3.   Click "Modify" task.

Step 4.   Click to select a program outcome to modify.

Step 5.   Make any changes.

Step 6.   Click "Save Program" when done.

Step 7.   Log out when all work is completed.

To delete an instructional program outcome:

Step 1.   Launch WW Institution Manager and log in.

Step 2.   Select "Program Outcomes" as source.

Step 3.   Click "Delete" task.

Step 4.   Click to select an program outcome to delete.

Step 5.   Confirm this is the program outcome to delete.

Step 6.   Click "Delete Existing Program Outcome" when confirmed.

Step 7.   Log out when all work is completed.

Important Note: An instructional program outcome should not be deleted if it has been used by any other WhippleWare application. The safest thing to do is deactivate it by un-checking the "Active" field using the "Modify" task.

Course Outcome Links to Program Outcomes

In instructional planning, program outcomes are linked to courses and in turn to one or more course outcomes. By targeting an intervention to improve mastery of these course outcomes, improved mastery of the corresponding program outcome can be expected. Use "Course Outcome Links to Program Outcomes" to select which course outcomes are linked to each program outcome.
Important Note: Before selecting course outcomes to link to a program outcome, the corresponding courses must be included in the program outcome's "Courses Where Program Outcome Taught". See the topic Instructional Program Outcomes.

To link a course outcome to a program outcome,

Step 1.   Launch WW Institution Manager and log in.

Step 2.   Select "Course Links to Program Outcomes" as source.

Step 3.   Click "Modify" task.

Step 4.   Select the appropriate course outcomes in the left box and click ">>" to move them to the right box.

Step 5.   To remove a course outcome, select it in the right box and click "<<".

Step 6.   Click "Save Course Outcome Links" when done.

Step 7.   Log out when all work is completed.

Important Note: The "Add" and "Delete" tasks are not used. All management can be accomplished using the "Modify" task.

Course Rubrics

Course rubrics (prefixes) can be managed (added, modified, and deleted).   Each rubric record consists of the following fields:

1. "Rubric" – *Enter the rubric.*
2. "Unit" – *Select the unit responsible for the rubric.*
3. "Active" – *Check if rubric is active.*

To add a course rubric:

Step 1.   Launch WW Institution Manager and log in.

Step 2.   Select "Course Rubric" as source.

Step 3.   Click "Add" task.

Step 4.   Enter the required information.

Step 5.   Click "Add New Rubric" when done.

Step 6.   Log out when all work is completed.

To modify a course rubric:

Step 1.   Launch WW Institution Manager and log in.

Step 2.   Select "Course Rubrics" as source.

Step 3.   Click "Modify" task.

Step 4.   Click to select a course rubric to modify.

Step 5.   Make any changes.

Step 6.   Click "Save Rubric" when done.

Step 7.   Log out when all work is completed.

Important Note: A course rubric should not be deleted. Instead, deactivate it by un-checking the "Active" field using the "Modify" task.

Course Assessment Defaults

Course outcomes assessment data can be collected and managed with the Outcomes Manager. Each course for which there is a master template in Syllabus Manager has a corresponding default assessment method and mastery target that is applied to new course outcome assessment data sets if a previous year's set does not exist.   If a set exists, the assessment methods and mastery targets are carried forward.

 To assign a default assessment method and mastery target,

Step 1.   Launch WW Institution Manager and log in.

Step 2.   Select "Course Assessment Defaults" as source.

Step 3.   Click "Modify" task.

Step 4.   Select the appropriate course.

Step 5.   Make any necessary changes.

Step 6.   Click "Save Course Assessment Defaults" when done.

Step 7.   Log out when all work is completed.

Important Note: The "Add" and "Delete" tasks are not used. All management can be accomplished using the "Modify" task.

Syllabus Policies

These are institution-wide policies that automatically display as part of all class syllabi. Each syllabus policy record consists of the following fields:

1. "No." *– **Enter the syllabus policy number. Note: The syllabus policy number is not displayed; it is used to control display order.***
2. "Heading" *– **Enter the heading for this policy (e.g. "Code of Academic Integrity").***
3. "Description" – Enter the full text of the policy as it will appear in the class syllabus.
4. "First Year" – Enter the first year the syllabus policy will be effective.
5. "Last Year" – Enter the last year the syllabus policy will be effective.
6. "Active" – Check if policy is active.

To add a syllabus policy:

Step 1.   Launch WW Institution Manager and log in.

Step 2.   Select "Syllabus Policies" as source.

Step 3.   Click "Add" task.

Step 4.   Enter the required information.

Step 5.   Click "Add New Syllabus Policy" when done.

Step 6.   Log out when all work is completed.

To modify a syllabus policy:

Step 1.   Launch WW Institution Manager and log in.

Step 2.   Select "Syllabus Policies" as source.

Step 3.   Click "Modify" task.

Step 4.   Click to select a syllabus policy to modify.

Step 5.   Make any changes.

Step 6.   Click "Save Syllabus Policy" when done.

Step 7.   Log out when all work is completed.

To delete a syllabus policy:

Step 1.   Launch WW Institution Manager and log in.

Step 2.   Select "Syllabus Policies" as source.

Step 3.   Click "Delete" task.

Step 4.   Click to select a syllabus policy to delete.

Step 5.   Confirm this is the syllabus policy to delete.

Step 6.   Click "Delete Existing Syllabus Policy" when confirmed.

Step 7.   Log out when all work is completed.

Important Note: A syllabus policy should not be deleted. Instead, deactivate it by un-checking the "Active" field using the "Modify" task.

Service Key Functions

Service units must link their planning activities to service key functions and associated assessments. The number of service key functions is not limited. The service key functions record consists of the following fields:

1. "No." – ***Enter the key function number.***
2. "Description" – ***Enter the key function description.***
3. "Default Assessment Method" – ***Enter the service key function's default assessment method.***
4. "Active" – ***Check if service key function is active.***

To add a service key function:

Step 1.   Launch WW Institution Manager and log in.

Step 2.   Select "Service Key Functions" as source.

Step 3.   Click "Add" task.

Step 4.   Enter the required information.

Step 5.   Click "Add New Service Key Function" when done.

Step 6.   Log out when all work is completed.

To modify a service key function:

Step 1.   Launch WW Institution Manager and log in.

Step 2.   Select "Service Key Functions" as source.

Step 3.   Click "Modify" task.

Step 4.   Click to select a service key function to modify.

Step 5.   Make any changes.

Step 6.   Click "Save Service key function" when done.

Step 7.   Log out when all work is completed.

To delete a service key function:

Step 1.   Launch WW Institution Manager and log in.

Step 2.   Select "Service Key Functions" as source.

Step 3.   Click "Delete" task.

Step 4.   Click to select a service key function to delete.

Step 5.   Confirm this is the service key function to delete.

Step 6.   Click "Delete Existing Service key function" when confirmed.

Step 7.   Log out when all work is completed.

Important Note: A service key function should not be deleted. Instead, deactivate it by un-checking the "Active" field using the "Modify" task.

Service Key Function Process

Service units identify processes that are carried out in accomplishing each service key function.   The service key function process record consists of the following fields:

1. "No." – ***Enter the process number.***
2. "Description" – ***Enter the process description.***
3. "Active" - ***Check if service key function is active.***

To add a service key function process:

Step 1.   Launch WW Institution Manager and log in.

Step 2.   Select "Service Processes" as source.

Step 3.   Click "Add" task.

Step 4.   Click to select a service unit.

Step 5.   Click to select a service key function.

Step 6.   Enter the required information.

Step 7.   Click "Add New Process" when done.

Step 8.   Log out when all work is completed.

To modify a service key function process:

Step 1.   Launch WW Institution Manager and log in.

Step 2.   Select "Service Processes" as source.

Step 3.   Click "Modify" task.

Step 4.   Click to select a service unit.

Step 5.   Click to select a service key function.

Step 6.   Click to select a service key function process to modify.

Step 7.   Make any changes.

Step 8.   Click "Save Process" when done.

Step 9.   Log out when all work is completed.

To delete a service key function process:

Step 1.   Launch WW Institution Manager and log in.

Step 2.   Select "Service Processes" as source.

Step 3.   Click "Delete" task.

Step 4.   Click to select a service unit.

Step 5.   Click to select a service key function.

Step 6.   Click to select a service key function process to delete.

Step 7.   Confirm this is the service key function process to delete.

Step 8.   Click "Delete Existing Process" when confirmed.

Step 9.   Log out when all work is completed.

Important Note: A service key function process should not be deleted. Instead, deactivate it by un-checking the "Active" field using the "Modify" task.

Assessment Focus

Service key functions and process are assessed on a regular basis, usually annually. Each assessment can focus on a different aspect of the key function or process. Each service assessment focus record consists of the following fields:

1. "No." – *Enter the assessment focus number. Note: The number is not displayed; it is used to control display order.*
2. "Description" – *Enter an assessment focus description.*
3. "Basic" – *Check if the assessment focus will be available for all service units to use.*
4. "Active" - *Check if service key function is active.*

To add an assessment focus:

Step 1.   Launch WW Institution Manager and log in.

Step 2.   Select "Service Assessment Focus" as source.

Step 3.   Click "Add" task.

Step 4.   Click to select a service unit.

Step 5.   Enter the required information.

Step 6.   Click "Add New Assessment Focus" when done.

Step 7.   Log out when all work is completed.

To modify an assessment focus:

Step 1.   Launch WW Institution Manager and log in.

Step 2.   Select "Service Assessment Focus" as source.

Step 3.   Click "Modify" task.

Step 4.   Click to select a service unit.

Step 5.   Click to select an assessment focus to modify.

Step 6.   Make any changes.

Step 7.   Click "Save Assessment Focus" when done.

Step 8.   Log out when all work is completed.

To delete an assessment focus:

Step 1.   Launch WW Institution Manager and log in.

Step 2.   Select "Service Assessment Focus" as source.

Step 3.   Click "Delete" task.

Step 4.   Click to select a service unit.

Step 5.   Click to select an assessment focus to delete.

Step 6.   Confirm this is the assessment focus process to delete.

Step 7.   Click "Delete Existing Assessment Focus" when confirmed.

Step 8.   Log out when all work is completed.

Important Note: An assessment focus should not be deleted. Instead, deactivate it by un-checking the "Active" field using the "Modify" task.