Organization Management in Planning & Self-Study

Intro for Department Chairs, Program Directors, and Assessment Coordinators

Office of Assessment & Strategic Initiatives,

Marshall University

Spring 2026

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What will this training cover?

- In this training, you'll learn how to manage your Organization (a college, department, degree program, certificate program) in P&SS.
- Managing an organization includes updating the org's mission statement, learning outcomes, curriculum, and assessment measures.

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Logging In

Log in

1. **Log in through MyMU**
2. ***At the right side of the screen, under "Employee Quick Links," click on "Watermark"***
3. ***Click on Planning & Self-Study (see screenshot on the right)***

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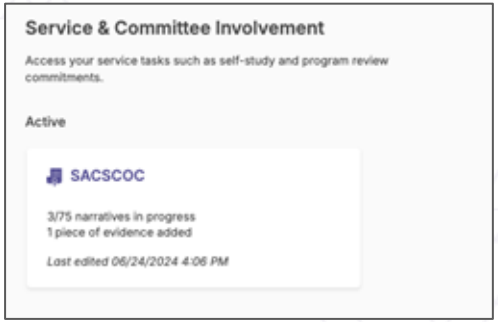
Welcome to Your Lead Home Page!

As a lead of a program; you may see three areas in your system.

My leadership: Showcases each area (e.g. program) where you are placed as a lead, with links to any projects and charts showing their progress.

Enter Program/Profile Progress: Allows quick links to all items in the program.

Service & committee involvement: Calls your attention to tasks related to self-studies and program reviews.



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Organization Management

Building the foundation of your system

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Your program's Learning Outcomes, Assessment Measures, and Curriculum Maps

- Again, if your organization/program had information in Taskstream, the Office of Assessment has set up an identical organization workspace for you in Planning & Self-Study.

- That workspace consists of a foundation including Learning Outcomes, a Curriculum Map, and a Mission Statement.

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Welcome, Lester Lead!

Note from Your Administrator

Reminder: All non-instructional plans are due by December 15, 2025.

My Leadership

View and access the course(s), program(s), or organization(s) you lead. You will receive guided prompts and tasks for effective leadership. Navigate to their profile(s) to access more insights about its progress, success, and improvement.

BA in English
Program - Lester Lead

ENTER PROGRAM

PROJECTS IN PROGRESS

2023-2033 Strategic Plan
5 Strategic Initiatives | 7 Strategic Goals

Outcomes Mapped to Strategic Goals
Not Mapped Mapped

Academic Program Plan 2024-2025
1 organization included | 1 outcome being assessed

PROFILE PROGRESS

Mission:	View Mission
Outcomes:	6
Outcomes Mapped:	Create Map
Curriculum Map:	Edit Map

Building Your Foundation in P&SS (Lead View)

Insights	View data about Student Learning & Licensure if applicable ***(not all institutions will see this tab)***
In Progress	Projects In Progress - Access, monitor and track your program's projects that are active and in progress
Program Information	Communicate the purpose and design of your organization or program through creation of a mission statement, outcomes and measures
Curriculum	Access and edit the curriculum map. View courses affiliated with this organization.
Actions	Review proposed Actions from assessment plans and provide status updates to communicate progress.
Docs & Reports	Add documents and access reports to track continuous improvement and organizational activity.

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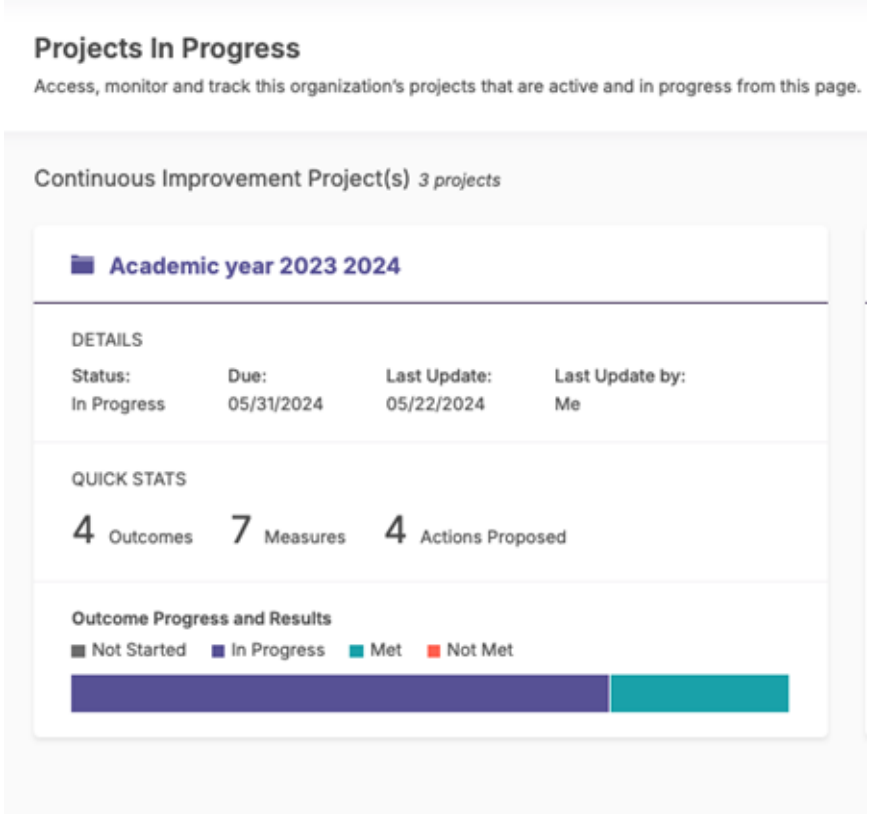
In Progress Tab

If a Project is open, it will be listed here, and the user can click on its name to access it.

**Note - if a Plan has been closed, a report containing its data can be located under the Docs & Reports tab.*



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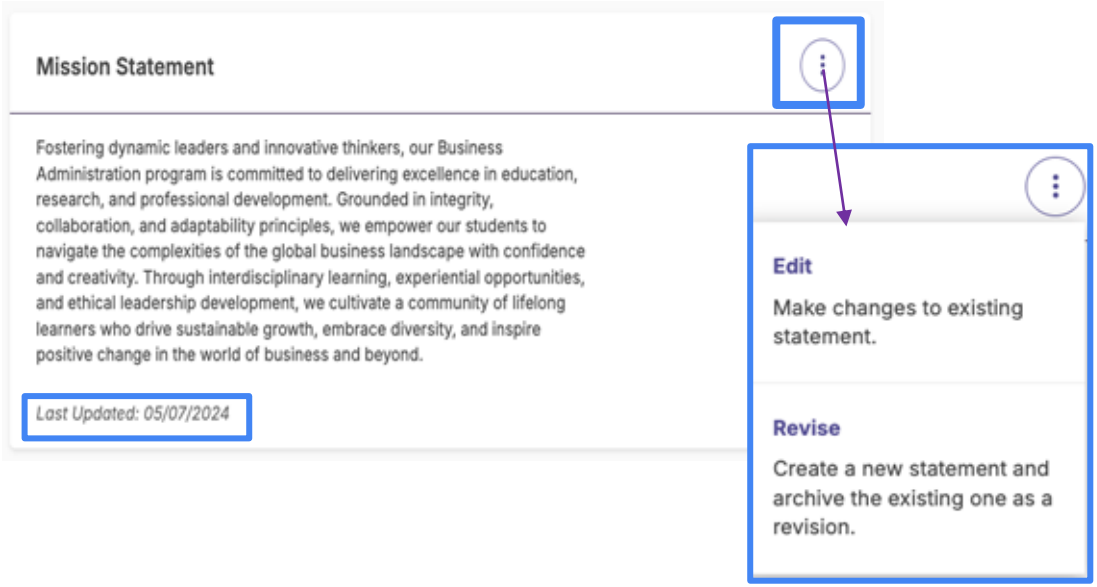
Program Information Tab: Mission statement

Add a Mission: Once in the Program ; you will click on **Program Information**. Then click "**Add Mission"**

- You have a 2000 character limit.
- Click "check mark" to finalize; "X" to cancel.
- You will see a timestamp for the last update.

Two editing options (edit and revise). Click "three dots" icon:

- **Edit** - Small typos/changes
- **Revise** - Allows you to input a new Mission Statement, align to reporting year, add notes for revision.



Program Information Tab: Learning Outcomes

Once in the Program ; you will click on **Program Information**.

You will find the Outcomes section below Mission Statement.

- Click on "MANAGE OUTCOMES".
- Select in top section "Learning Outcomes".
- Then "CREATE NEW OUTCOME".

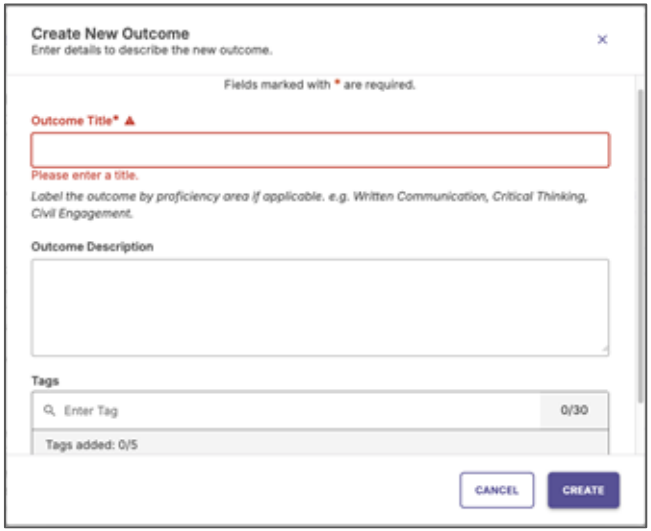
Outcome Title is required. You have 70 characters.

It is optional to input Outcome Description and Tags.

You are able to place Tags on Learning Outcomes only.

Once done, click "**CREATE**"

You can now click "**DONE**"



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Program Information Tab: Success Outcomes

Once in the Program ; you will click on **Program Information**.

You will find the Outcomes section below Mission Statement.

- Click on "MANAGE OUTCOMES".
- Select in top section "Success Outcome.
- Then "CREATE NEW OUTCOME".

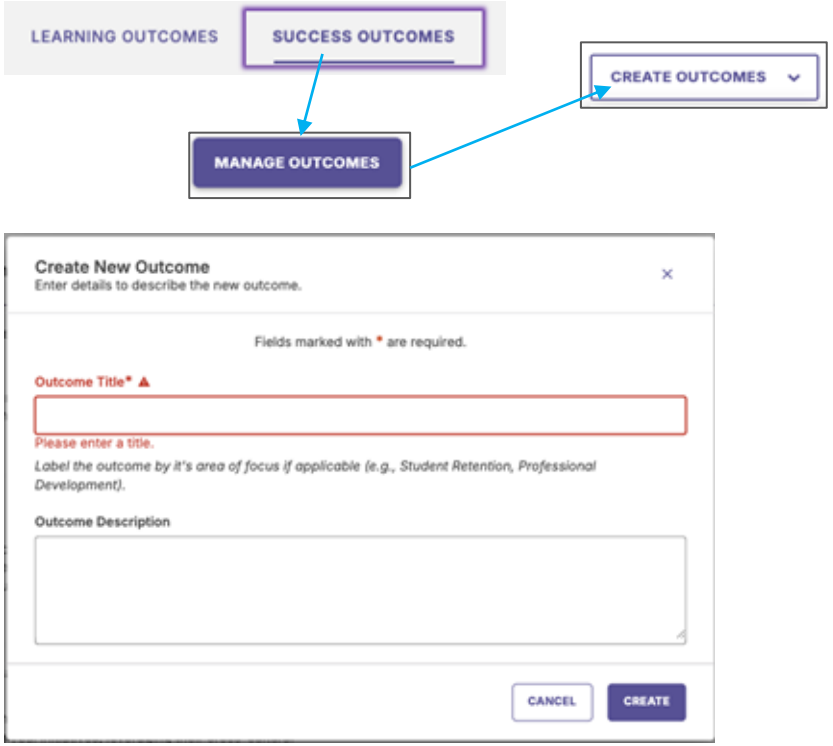
Outcome Title is required. You have 70 characters.

It is optional to input Outcome Description and Tags.

You are unable to place Tags on Success Outcomes

Once done, click "**CREATE**"

You can now click "**DONE**"



Marshall University note:
Success Outcomes are currently optional. However, if your program tracks metrics like program-level retention, graduation rates, major-level GPA, etc., "success outcomes" would be a great space for tracking that data!

Program Information Tab: Manage Outcomes

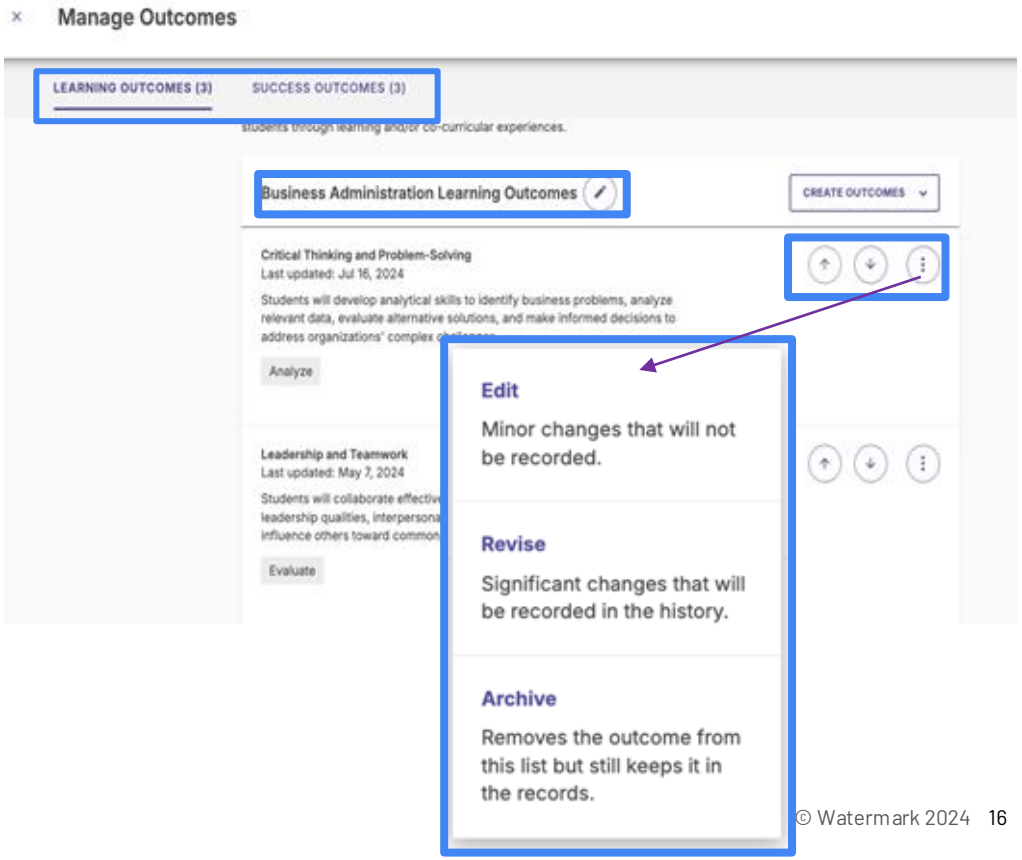
You are able to edit Outcomes.

Click three dots icon next to the outcome and:

- **Edit:** Used for typos, will save over the past
- **Revise:** Use for new outcomes associated with a given year (or just create a new outcome and archive the existing one). Will save the history.
- **Archive:** Saves the outcome for future use but removes from current lists . Will save in an "archived" list where it can be restored.
- **Delete:** Only available for outcomes with no other attachments such as maps

Up and Down arrows- move outcomes

Remember to click "**DONE**"



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Program Information Tab: Outcome Map

Once in the Program, you will click on **Program Information**. You will find Outcomes section below Mission Statement.

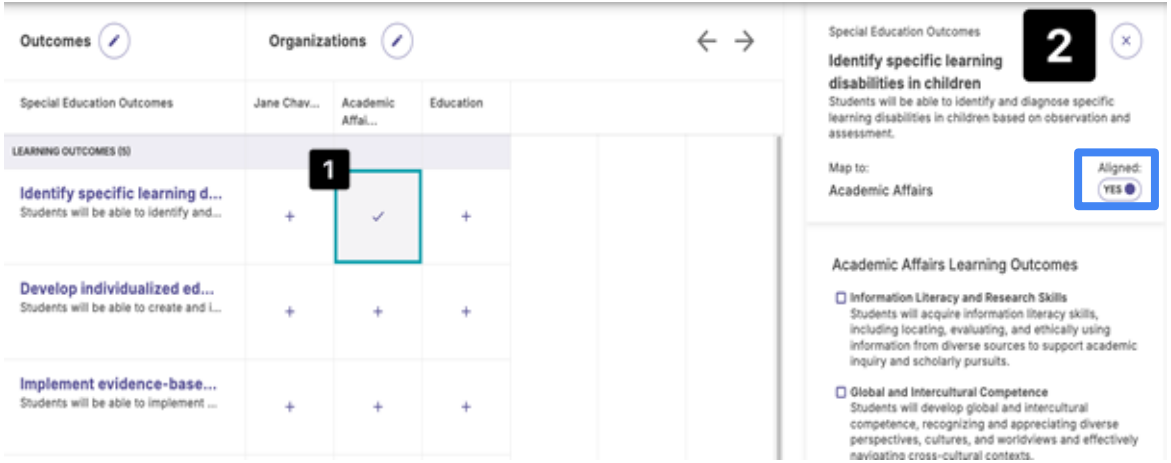
The Outcome Map button will appear once Outcomes have been added.

- Click on "Edit OUTCOME MAP".

Step 1- To align outcome(s), select the "+" associated with the desired outcome and parent organization (e.g. program or institution).

Step 2- In the side panel **toggle "yes"** under Aligned. Map to any specific outcomes associated with the parent organization that populate on this side panel. Check appropriate box to align outcome.

You must click **"Create/Update"** in top right corner to save. After you create the first time; "create" will change to "Update".



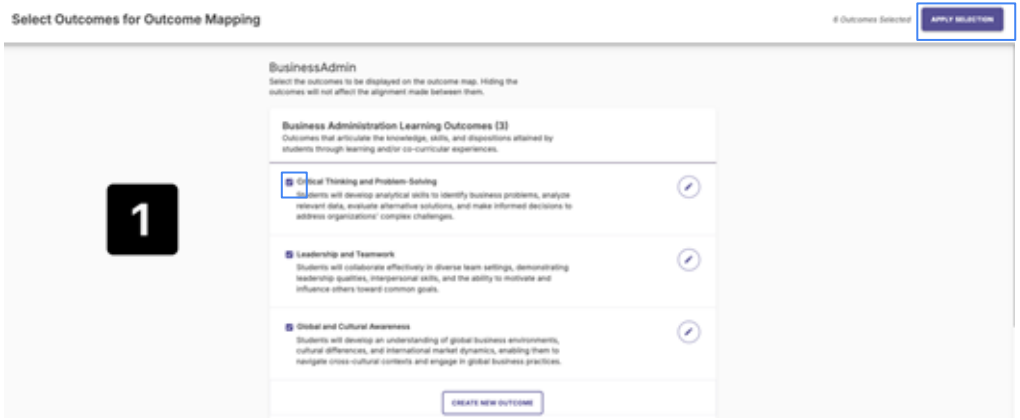
Program Information Tab: Outcome Map, Continued

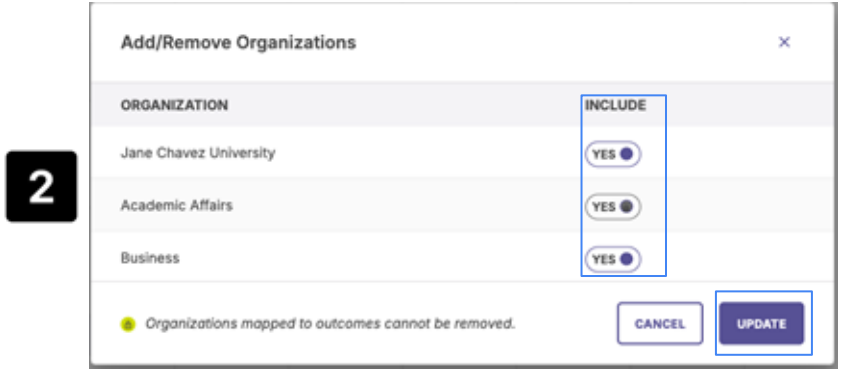
Customize the look of your map by:

1. Clicking icon next to "Outcomes".
   - Uncheck box where you want to hide an outcome
   - Click "Apply Selection"

2. Clicking icon next to "Organizations"
   - Toggle to "No" where you want to hide an organization
   - Click UPDATE

These selections can be restored by following the reverse process





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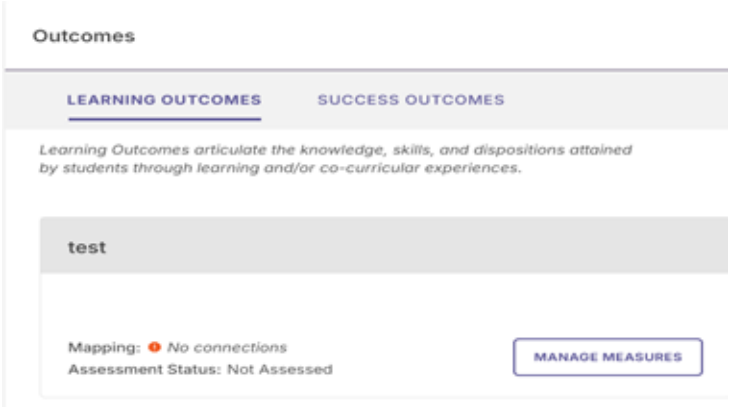
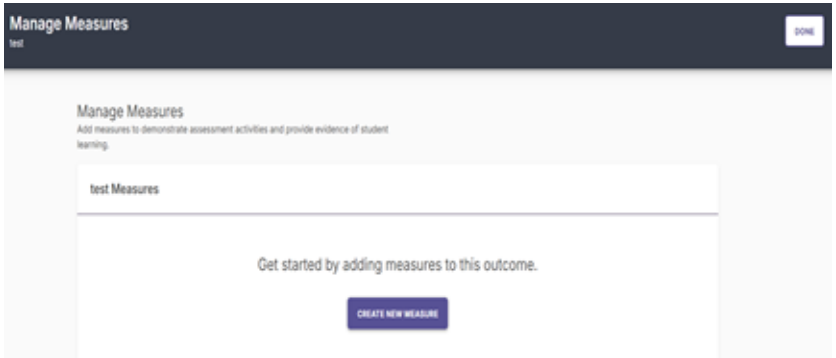
Program Information Tab: Create a Measure



Each outcome has a **"Manage Measures"** button

- You can create as many measures for an outcome as you need
- Click "Manage Measures, then "Create New Measure".



Program Information Tab: Create a Measure, Continued

Add details:

Title (*required*)

Method – see dropdown list

Success and Learning outcomes may have different methods.

Description

Outcome & Program are displayed

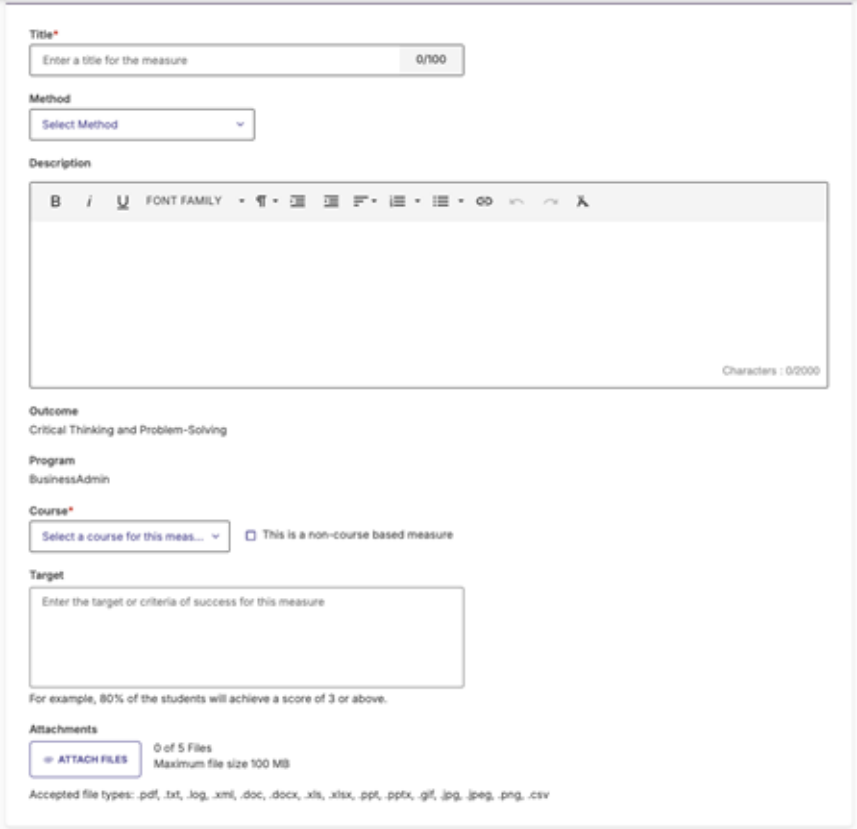
Course (*if applicable*)

Target

Attachments

Click "**CREATE MEASURE**"

Click "**DONE**"



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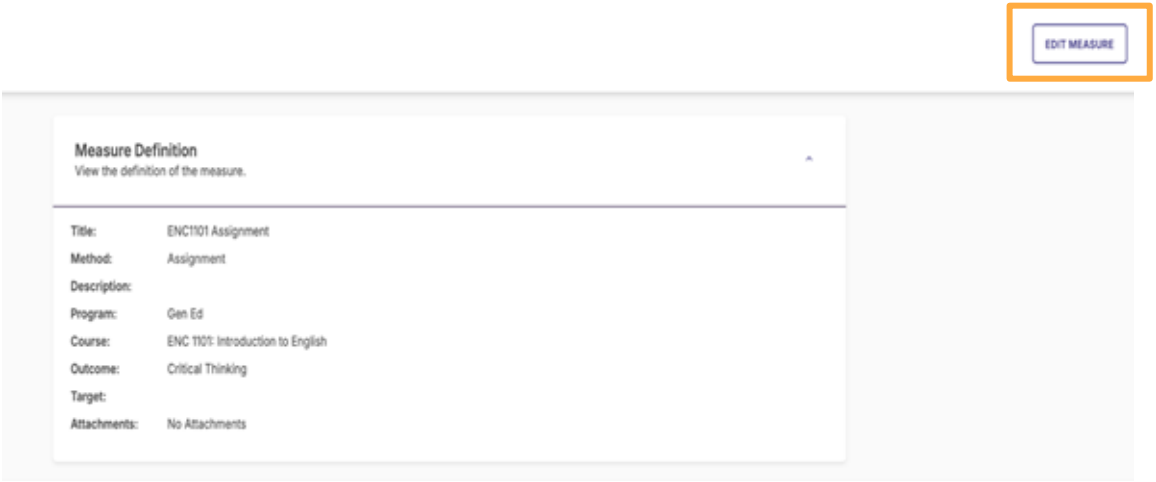
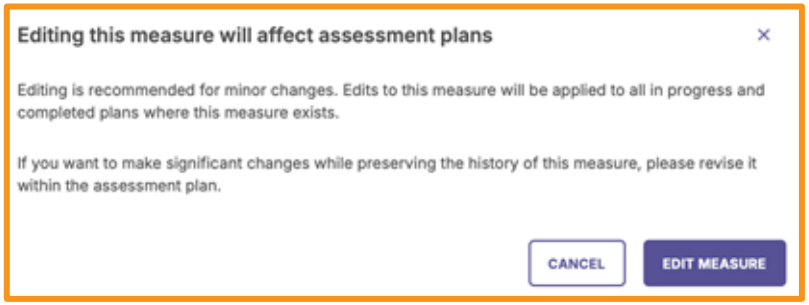
Edit an Existing Measure

To Edit an existing measures:

- Click on the measure itself
- At the top right, you will see an Edit option





Note! This will impact your Plans

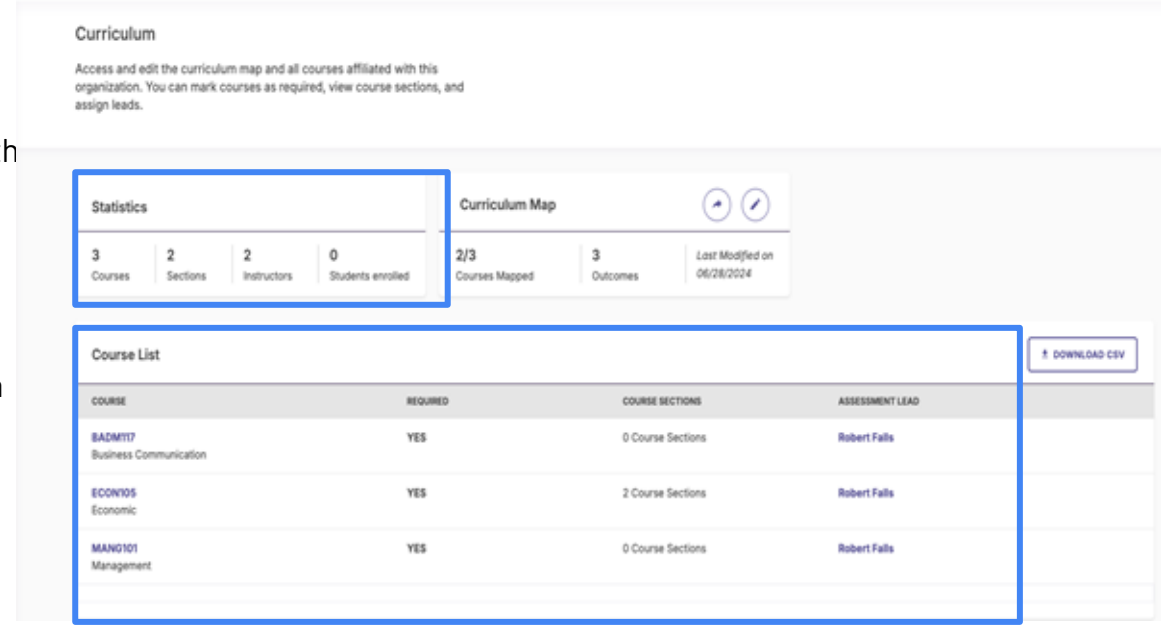
Curriculum Tab

Statistics: Reports information about total course sections, etc. associated with this organization or program.

Course List: Lists courses that can be included in a curriculum map, or included in a measure for assessment purposes

If you need courses that do not appear on your list, please talk with your Administrator.

Note: A CSV report can be downloaded



Curriculum Tab: Curriculum Maps

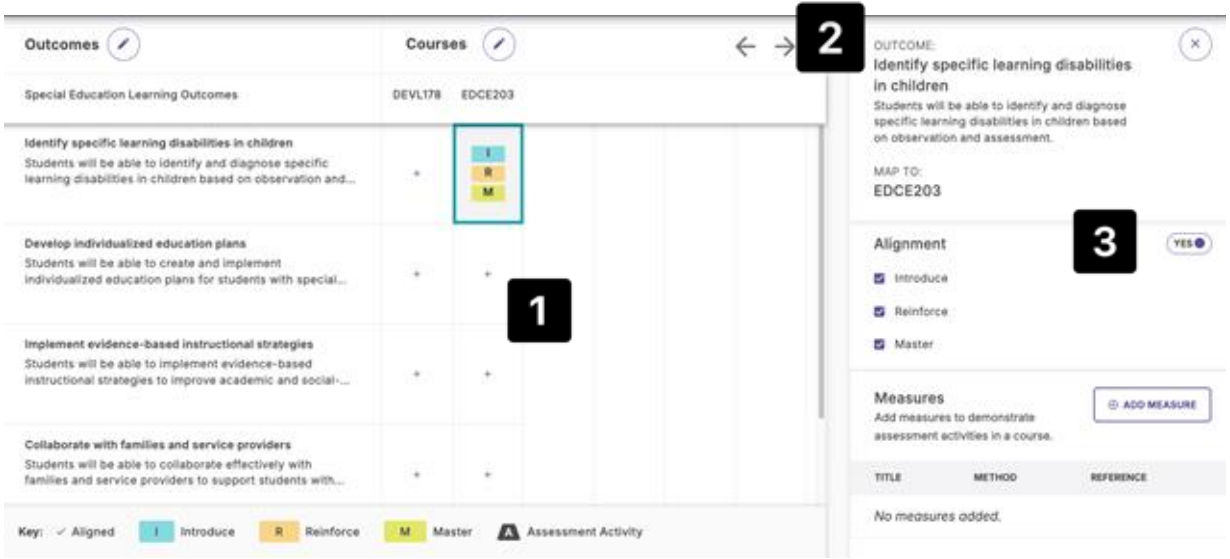
Click on “Create New Map” or “ ” icon to edit an existing map.

To align outcome(s) to courses, select the "+" associated with the desired outcome and Courses.

1. In the side panel **toggle “yes”** next to Aligned. Map to any specific outcomes associated with the Course that populate on this side panel.
2. Select the Alignment (I,R,M). If the Outcome is being used in a Plan then A (Assessment Activity) will show.

   SAVE AND EXIT.

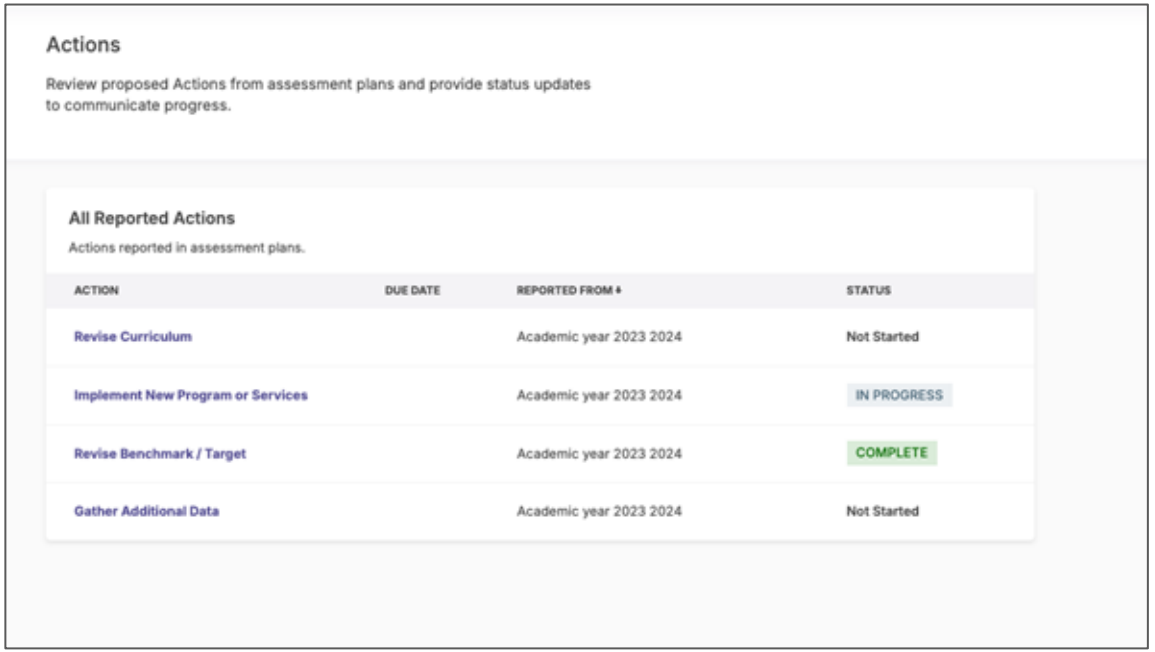
   Click “ ” to share as PDF or link.



Actions Tab

Once you start participating in Assessment Plans, you will be able to add **Actions**.

This screen allows you to **follow the status** of any Actions and **add updates** to Actions.



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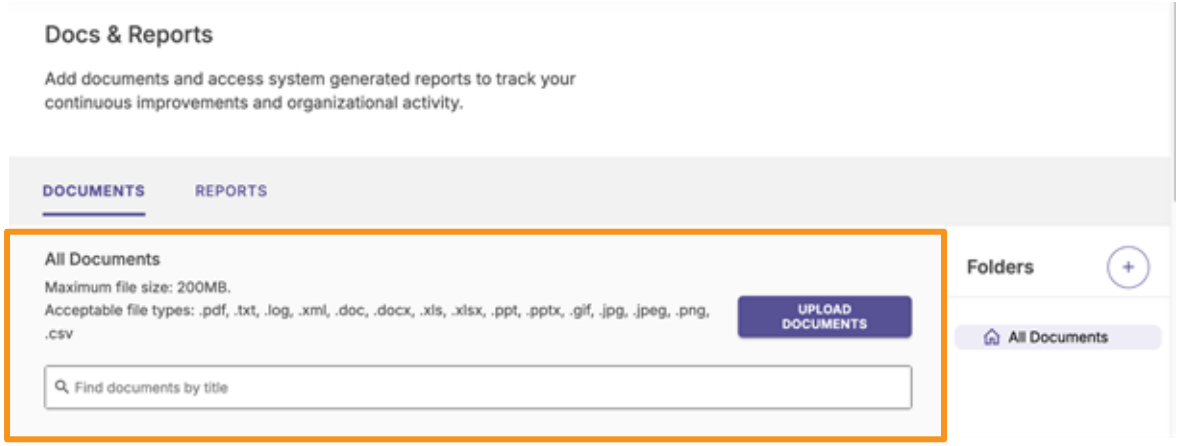
Marshall NOTE: Your organization's old reports have been archived in this section. Make sure to save any attachments from Taskstream that you need!

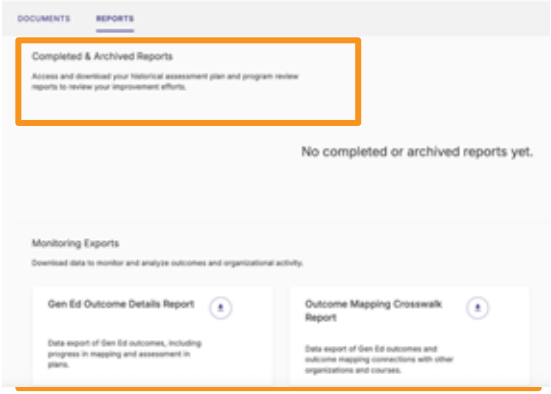
Docs & Reports Tab

3 functionalities in this area:

1) Access completed assessment plan and archived program reviews
2) Upload documents (and manage in folders)
3) View reports for your unit:
    4) Outcome Detail Report
    5) Outcome Mapping Crosswalk

If you are the Lead of an Organization over other Programs or Organizations, you can view their reports.



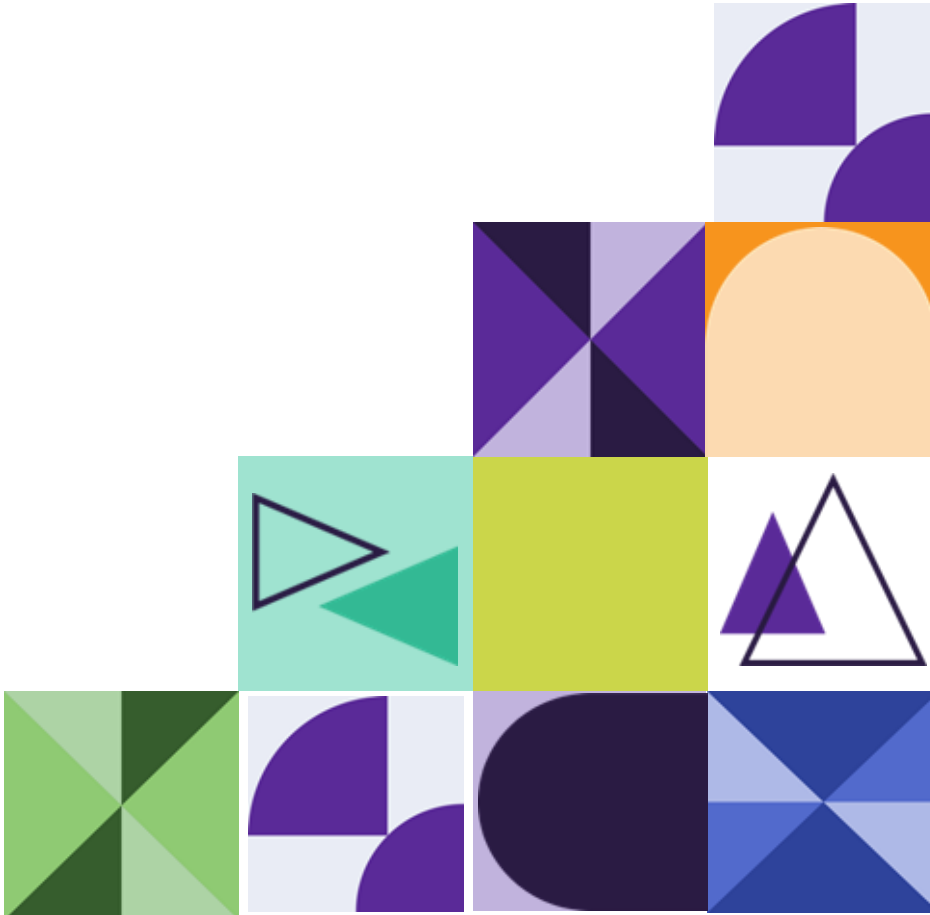


Questions about Organization Management?

Email the Office of Assessment & Strategic Initiatives (russell58@marshall.edu or careya@marshall.edu)

Thanks

FOR YOUR ATTENTION



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