



Organization Management in Planning & Self-Study

**Intro for Department Chairs,
Program Directors, and Assessment
Coordinators**

*Office of Assessment & Strategic Initiatives,
Marshall University*

Spring 2026



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.



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)***

Welcome to Watermark!

Choose your Watermark Product:

Planning & Self-Study

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.



Organization Management

Building the foundation of your system



- 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.

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)



ENTER PROGRAM

 Insights	View data about Student Learning & Licensure if applicable <i>(not all institutions will see this tab)</i>
 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.

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.*

Projects In Progress

Access, monitor and track this organization's projects that are active and in progress from this page.

Continuous Improvement Project(s) 3 projects

Academic year 2023 2024

DETAILS

Status:	Due:	Last Update:	Last Update by:
In Progress	05/31/2024	05/22/2024	Me

QUICK STATS

4 Outcomes 7 Measures 4 Actions Proposed

Outcome Progress and Results

■ Not Started ■ In Progress ■ Met ■ Not Met



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.

The screenshot displays the 'Mission Statement' section. At the top, the title 'Mission Statement' is followed by a three-dot menu icon. Below this is a text area containing the mission statement: 'Fostering dynamic leaders and innovative thinkers, our Business Administration program is committed to delivering excellence in education, research, and professional development. Grounded in integrity, collaboration, and adaptability principles, we empower our students to navigate the complexities of the global business landscape with confidence and creativity. Through interdisciplinary learning, experiential opportunities, and ethical leadership development, we cultivate a community of lifelong learners who drive sustainable growth, embrace diversity, and inspire positive change in the world of business and beyond.' Below the text is a 'Last Updated: 05/07/2024' timestamp. To the right, a menu is open, showing two options: 'Edit' (Make changes to existing statement.) and 'Revise' (Create a new statement and archive the existing one as a 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**"



A screenshot of the 'Create New Outcome' form. The title is 'Create New Outcome' with a close button (X). Below the title is the instruction 'Enter details to describe the new outcome.' and a note 'Fields marked with * are required.' The form has three main sections: 1. 'Outcome Title*' with a red asterisk and a small triangle icon, followed by a text input field and the instruction 'Please enter a title.' 2. 'Outcome Description' with a text area and the instruction 'Label the outcome by proficiency area if applicable. e.g. Written Communication, Critical Thinking, Civil Engagement.' 3. 'Tags' with a search input field containing 'Enter Tag', a character count '0/30', and a 'Tags added: 0/5' indicator. At the bottom right, there are 'CANCEL' and 'CREATE' buttons.

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".

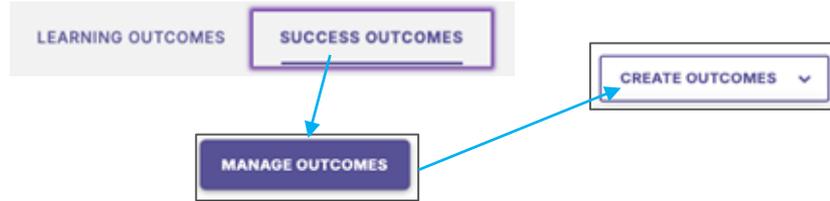
Outcome Title is required. You have 70 characters.

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**"



The screenshot shows the 'Create New Outcome' form. The title is 'Create New Outcome' with a close button (X) in the top right corner. Below the title is the instruction 'Enter details to describe the new outcome.' and a note 'Fields marked with * are required.' The form contains two main input fields: 'Outcome Title*' which is a text input field with a red border and a red triangle icon, and 'Outcome Description' which is a larger text area. Below the description field is a small 'x' icon in the bottom right corner. At the bottom of the form are two buttons: 'CANCEL' and 'CREATE'.

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"**

The screenshot displays the 'Manage Outcomes' interface. At the top, there are two tabs: 'LEARNING OUTCOMES (3)' and 'SUCCESS OUTCOMES (3)'. Below the tabs, there is a search bar for 'Business Administration Learning Outcomes' and a 'CREATE OUTCOMES' button. The main content area shows a list of outcomes. The first outcome is 'Critical Thinking and Problem-Solving', last updated on Jul 16, 2024. It has a description: 'Students will develop analytical skills to identify business problems, analyze relevant data, evaluate alternative solutions, and make informed decisions to address organizations' complex challenges.' Below the description is an 'Analyze' button. To the right of the outcome is a three-dot menu icon. A dropdown menu is open, showing three options: 'Edit' (Minor changes that will not be recorded.), 'Revise' (Significant changes that will be recorded in the history.), and 'Archive' (Removes the outcome from this list but still keeps it in the records.). Below the dropdown menu are up and down arrow icons and another three-dot menu icon.

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".

The screenshot displays the 'Outcome Map' interface. It features a table with 'Outcomes' on the left and 'Organizations' on the right. The table has columns for 'Special Education Outcomes', 'Jane Chav...', 'Academic Affail...', and 'Education'. The 'LEARNING OUTCOMES (5)' section is highlighted. The first row, 'Identify specific learning d...', has a '+' in the 'Jane Chav...' column and a checked box in the 'Academic Affail...' column, with a '1' in a black box pointing to the checked box. The second row, 'Develop individualized ed...', has '+' signs in all three organization columns. The third row, 'Implement evidence-base...', also has '+' signs in all three organization columns. To the right, a side panel titled 'Special Education Outcomes' shows 'Identify specific learning disabilities in children' with a description. Below it, 'Map to: Academic Affairs' is shown with an 'Aligned: YES' button, which has a '2' in a black box pointing to it. Below the side panel, 'Academic Affairs Learning Outcomes' are listed, including 'Information Literacy and Research Skills' and 'Global and Intercultural Competence'.

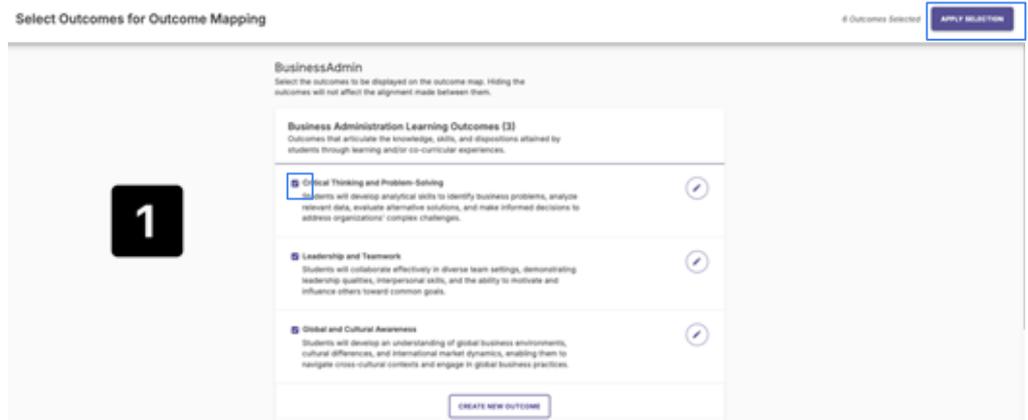
Outcomes	Jane Chav...	Academic Affail...	Education
Special Education Outcomes			
LEARNING OUTCOMES (5)			
Identify specific learning d... Students will be able to identify and...	+	<input checked="" type="checkbox"/>	+
Develop individualized ed... Students will be able to create and L...	+	+	+
Implement evidence-base... Students will be able to implement ...	+	+	+

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



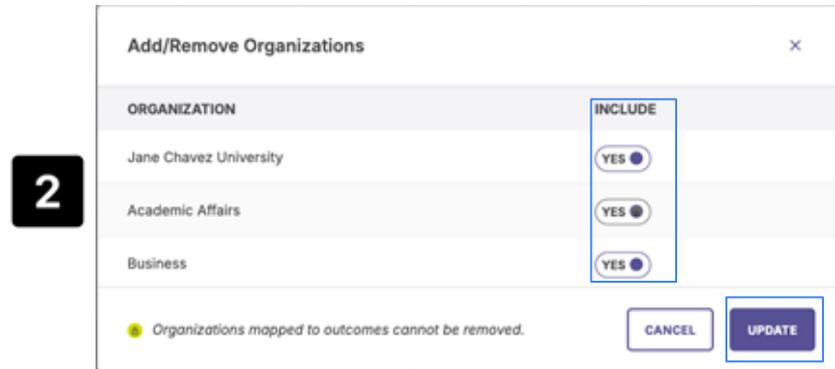
Select Outcomes for Outcome Mapping 4 Outcomes Selected **APPLY SELECTION**

BusinessAdmin
Select the outcomes to be displayed on the outcome map. Hiding the outcomes will not affect the alignment made between them.

Business Administration Learning Outcomes (3)
Outcomes that articulate the knowledge, skills, and dispositions attained by students through learning and/or co-curricular experiences.

- Critical Thinking and Problem-Solving**
Students will develop analytical skills to identify business problems, analyze relevant data, evaluate alternative solutions, and make informed decisions to address organizations' complex challenges.
- Leadership and Teamwork**
Students will collaborate effectively in diverse team settings, demonstrating leadership qualities, interpersonal skills, and the ability to motivate and influence others toward common goals.
- Global and Cultural Awareness**
Students will develop an understanding of global business environments, cultural differences, and international market dynamics, enabling them to navigate cross-cultural contexts and engage in global business practices.

CREATE NEW OUTCOME



Add/Remove Organizations ✕

ORGANIZATION	INCLUDE
Jane Chavez University	YES <input checked="" type="radio"/>
Academic Affairs	YES <input checked="" type="radio"/>
Business	YES <input checked="" type="radio"/>

Organizations mapped to outcomes cannot be removed. **CANCEL** **UPDATE**

Program Information Tab: Create a Measure

Outcomes

LEARNING OUTCOMES SUCCESS OUTCOMES

Learning Outcomes articulate the knowledge, skills, and dispositions attained by students through learning and/or co-curricular experiences.

test

Mapping: ● No connections
Assessment Status: Not Assessed

MANAGE MEASURES

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”.

Manage Measures

test

Manage Measures

Add measures to demonstrate assessment activities and provide evidence of student learning.

test Measures

Get started by adding measures to this outcome.

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”**

The screenshot shows a web form for creating a measure. It includes the following sections:

- Title***: A text input field with the placeholder "Enter a title for the measure" and a character count of "0/100".
- Method**: A dropdown menu with the placeholder "Select Method".
- Description**: A rich text editor with a toolbar containing bold, italic, underline, font family, font size, text color, background color, bulleted list, numbered list, link, and unlink icons. The text area is empty, and the character count is "0/2000".
- Outcome**: A text field containing "Critical Thinking and Problem-Solving".
- Program**: A text field containing "BusinessAdmin".
- Course***: A dropdown menu with the placeholder "Select a course for this meas..." and a checkbox labeled "This is a non-course based measure".
- Target**: A text input field with the placeholder "Enter the target or criteria of success for this measure". Below the field is an example: "For example, 80% of the students will achieve a score of 3 or above."
- Attachments**: A button labeled "ATTACH FILES" with a plus icon, and text indicating "0 of 5 Files" and "Maximum file size 100 MB".
- Accepted file types**: A list of supported file formats: ".pdf, .txt, .log, .xml, .doc, .docx, .xls, .xlsx, .ppt, .pptx, .gif, .jpg, .jpeg, .png, .csv".

Edit an Existing Measure

To Edit an existing measures:

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

EDIT MEASURE

Measure Definition

View the definition of the measure.

Title: ENC1101 Assignment
Method: Assignment
Description:
Program: Gen Ed
Course: ENC 1101: Introduction to English
Outcome: Critical Thinking
Target:
Attachments: No Attachments

Editing this measure will affect assessment plans

×

Editing is recommended for minor changes. Edits to this measure will be applied to all in progress and completed plans where this measure exists.

If you want to make significant changes while preserving the history of this measure, please revise it within the assessment plan.

CANCEL

EDIT MEASURE

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

The screenshot displays the 'Curriculum' interface. At the top, there is a header 'Curriculum' with a sub-header 'Access and edit the curriculum map and all courses affiliated with this organization. You can mark courses as required, view course sections, and assign leads.' Below this, there are two main sections: 'Statistics' and 'Curriculum Map'. The 'Statistics' section is highlighted with a blue box and contains a table with four columns: 'Courses' (3), 'Sections' (2), 'Instructors' (2), and 'Students enrolled' (0). The 'Curriculum Map' section is also highlighted with a blue box and contains a table with three columns: 'Courses Mapped' (2/3), 'Outcomes' (3), and 'Last Modified on' (06/28/2024). Below these sections is the 'Course List' section, which is also highlighted with a blue box. It contains a table with four columns: 'COURSE', 'REQUIRED', 'COURSE SECTIONS', and 'ASSESSMENT LEAD'. The table lists three courses: 'BADM117 Business Communication', 'ECON105 Economic', and 'MANG101 Management'. A 'DOWNLOAD CSV' button is located to the right of the 'Course List' table.

COURSE	REQUIRED	COURSE SECTIONS	ASSESSMENT LEAD
BADM117 Business Communication	YES	0 Course Sections	Robert Falls
ECON105 Economic	YES	2 Course Sections	Robert Falls
MANG101 Management	YES	0 Course Sections	Robert Falls

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.

The screenshot displays the Curriculum Maps interface. It features a table with columns for Outcomes and Courses (DEVL178 and EDCE203). The first row, 'Identify specific learning disabilities in children', has a '+' in the DEVL178 column and a selection box containing 'I', 'R', and 'M' in the EDCE203 column. A red box highlights this selection box, and a '1' callout points to it. A '2' callout points to the navigation arrows at the top right. A '3' callout points to the 'Alignment' section on the right, which has a 'YES' toggle. Below the table is a legend: Key: ✓ Aligned, I Introduce, R Reinforce, M Master, A Assessment Activity. The right panel shows the selected outcome: 'Identify specific learning disabilities in children' with a description, 'MAP TO: EDCE203', and an 'ADD MEASURE' button.

Outcomes	Courses
Special Education Learning Outcomes	DEVL178 EDCE203
Identify specific learning disabilities in children Students will be able to identify and diagnose specific learning disabilities in children based on observation and...	+ [I R M]
Develop individualized education plans Students will be able to create and implement individualized education plans for students with special...	+ +
Implement evidence-based instructional strategies Students will be able to implement evidence-based instructional strategies to improve academic and social...	+ +
Collaborate with families and service providers Students will be able to collaborate effectively with families and service providers to support students with...	+ +

Key: ✓ Aligned I Introduce R Reinforce M Master A Assessment Activity

Alignment YES

Measures ADD MEASURE

No measures added.

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.

Actions

Review proposed Actions from assessment plans and provide status updates to communicate progress.

All Reported Actions

Actions reported in assessment plans.

ACTION	DUE DATE	REPORTED FROM *	STATUS
Revise Curriculum		Academic year 2023 2024	Not Started
Implement New Program or Services		Academic year 2023 2024	IN PROGRESS
Revise Benchmark / Target		Academic year 2023 2024	COMPLETE
Gather Additional Data		Academic year 2023 2024	Not Started

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.

The screenshot displays the 'Docs & Reports' interface. At the top, it says 'Docs & Reports' and 'Add documents and access system generated reports to track your continuous improvements and organizational activity.' Below this are two tabs: 'DOCUMENTS' (selected) and 'REPORTS'. The 'All Documents' section is highlighted with an orange box and contains the following text: 'All Documents', 'Maximum file size: 200MB.', 'Acceptable file types: .pdf, .txt, .log, .xml, .doc, .docx, .xls, .xlsx, .ppt, .pptx, .gif, .jpg, .jpeg, .png, .csv', and a search bar with the placeholder 'Find documents by title'. To the right of this section is a blue 'UPLOAD DOCUMENTS' button. On the far right, there is a 'Folders' section with a plus icon and a button labeled 'All Documents'. Below the 'DOCUMENTS' tab, the 'REPORTS' section is also highlighted with an orange box. It contains the text 'Completed & Archived Reports' and 'Access and download your historical assessment plan and program review reports to review your improvement efforts.' Below this, it says 'No completed or archived reports yet.' At the bottom, there is a 'Monitoring Exports' section with two report cards: 'Gen Ed Outcome Details Report' and 'Outcome Mapping Crosswalk Report', each with a plus icon. The 'Gen Ed Outcome Details Report' card has a small description: 'Data export of Gen Ed outcomes, including progress in mapping and assessment in areas.' The 'Outcome Mapping Crosswalk Report' card has a small description: 'Data export of Gen Ed outcomes and outcome mapping connections with other organizations and courses.'

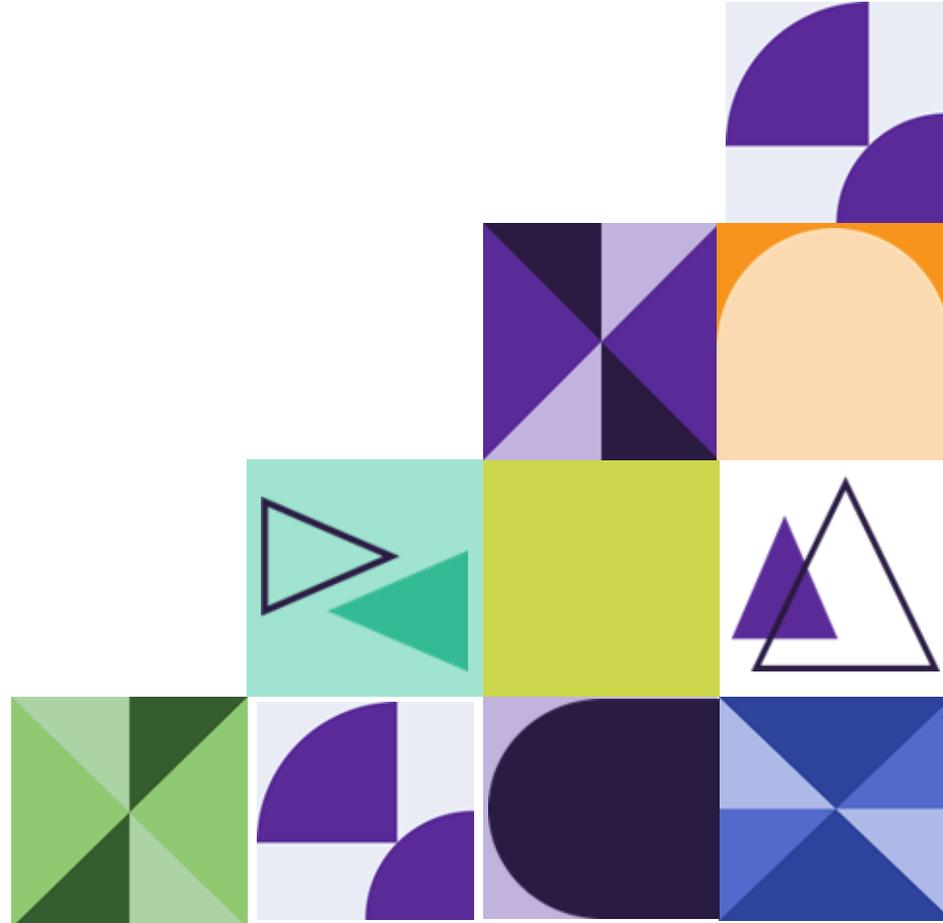
Questions about Organization Management?

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



Thanks

FOR YOUR ATTENTION



watermark

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