# Coordinator Training

*Training on eLumen Functions for Coordinators and Data Stewards*

## Navigation

Your eLumen URL: ________________

### The Top Banner

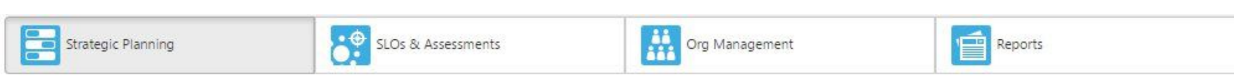
The top banner is visible from any screen.


The User Icon and Role Menu displays the user's name, and allows the user to switch roles, if the user has more than one role, and view the Institution, a Division, or a Department.


The Organization menu displays the current Division or Department for the 4 sections. Coordinators associated with more than one department or program will need to use this menu to change views.

The Inbox holds the Action Plans, RFI, and workflows that require attention.


### The Sections




Department and Program Coordinators have access to Strategic Planning, SLOs & Assessments, Org Management, and Reports for each of the divisions and departments which they are assigned.

**Strategic Planning** - Coordinators can access the data collection and results features of eLumen from this section including the Strategic Initiatives, Assessments, Action Plans, and Requests for Information.

**SLOs & Assessments** - This section contains the student learning outcomes, SLO mappings, and a copy of the Assessments section.

**Org Management** - This section allows coordinators to manage programs, courses, sections and other organizational elements.

**Reports -** This section contains the exportable reports.

*The Course/Context Coordinator View*


The Course and Context coordinators have access to four sections which are modified versions of the ones for Data Stewards and Department/Program Coordinators.

**Strategic Planning** - This section contains the Action Plans and Requests for Information. Coordinators will spend most of their time in this section.

**Courses** - This section contains all of the organization management for the courses and contexts the coordinator oversees.

**SLOs & Assessments** - This section contains the student learning outcomes for the courses and contexts the coordinator oversees.

**Reports** - This section contains the exportable reports.

*The Faculty View*


Faculty have access to three sections which are modified versions of the ones for Data Stewards and Department/Program Coordinators.

**Courses** - This section contains all of the Assessments, Action Plans, and RFI for each section along with other section management.

**SLOs & Assessments** - This section contains the student learning outcomes for the sections and settings the faculty member evaluates and the Assessment Library.

**Reports** - This section contains the exportable reports.

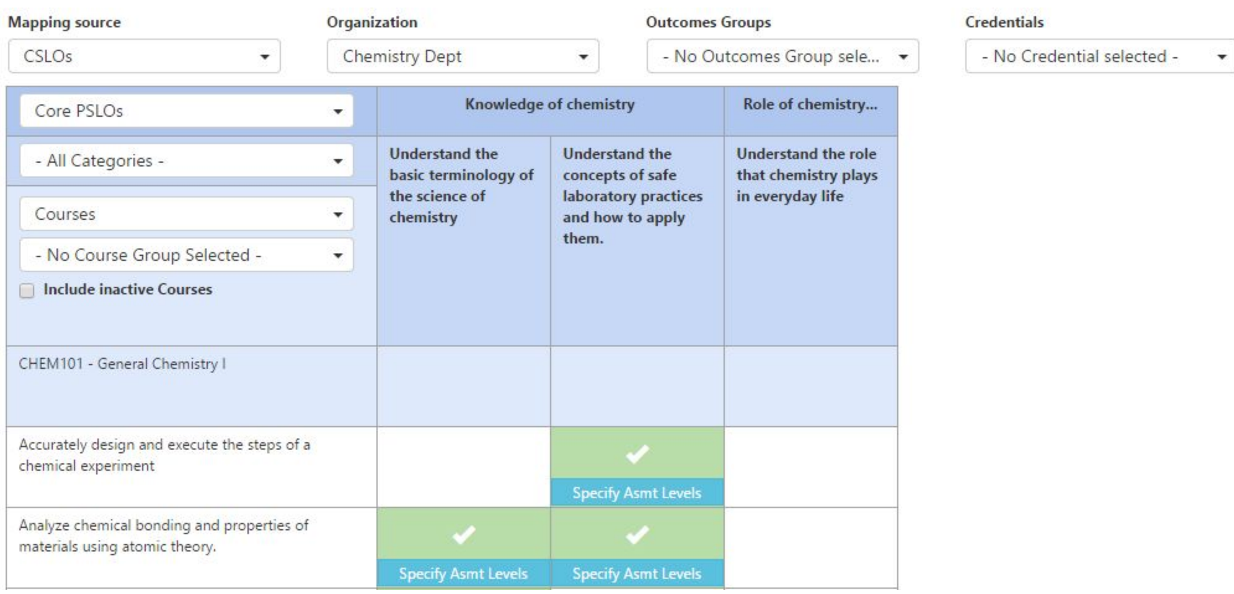
***Note:*** *Faculty can see the Strategic Planning section and Initiatives tab when they are added as a collaborator on a Strategic Initiative. They will not have access to the other Strategic Planning tabs.*

# Curriculum Mapping

Curriculum Mapping of SLOs within eLumen allows for reporting that takes the results of assessment of CSLOs and aggregates them for the reporting of student mastery of PSLOs and ISLOs.

***Note:*** *Mappings of program SLOs onto institutional SLOs, course SLOs onto program SLOs, and course SLOs onto institutional SLOs should represent the mapping of specific variations of skills or content onto more general skills or content areas. Whereas ISLOs should be global skills that students develop over time, such as communication, CSLOs should be specific outcomes attainable in a single semester. In addition, the mapping of CSLOs to ISLOs should represent the mapping of a specific variation of general skills.*

To map one SLO onto another, select the correct program from the Org Entity drop-down menu then go to the **SLOs & Assessments** section and the **Curriculum Mappings** tab. Use the filters to navigate between the SLO Classes and limit the visible SLOs.




To create a mapping between any two SLOs or a course and an SLO, locate the row for the CSLO, course, or PSLO and the column for the ISLO or PSLO. Select the cell on the table that corresponds to the two SLOs or the course and SLO. This will display a green check mark in the box.

***Note:*** *Mapping a course to a PSLO does not map all CSLOs to that PSLO.*

Some schools prefer to set an assessment level for the mapping. These can be specified after a mapping is created by selecting **Specify Asmt Levels**.

To remove a mapping, select within a mapped cell.

# Creating Assessment

## Setting up Reflection Templates

There are two ways to collect responses from faculty on their analysis of their assessment scores: *Reflections* and *Action Plans*.

Essentially, Reflections should be used to gather faculty's evaluation of their assessment scoring data. Action Plans should be used to gather improvement actions from sections, courses, or departments.

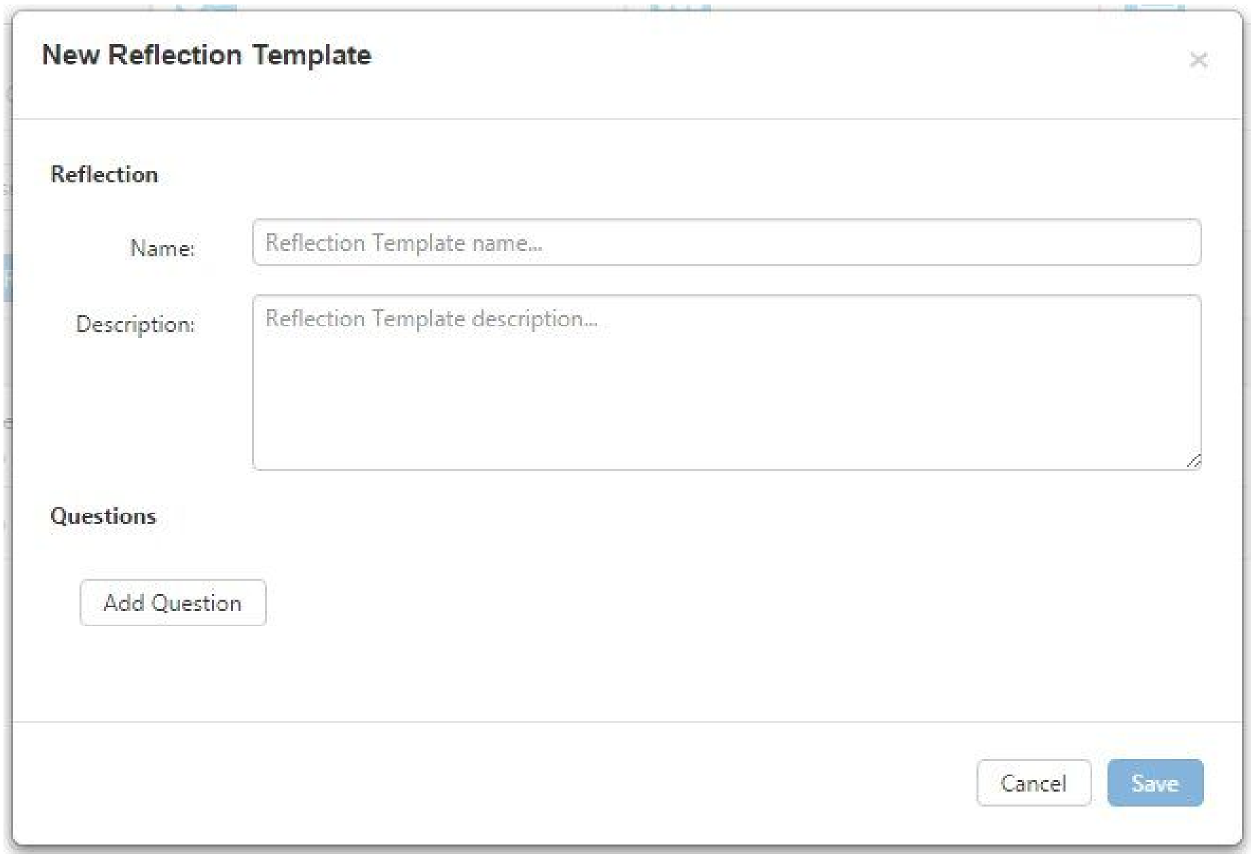
| | **Reflections** | **Action Plans** |
|---|---|---|
| Planning | Included within an assessment | Planned separately from Assessments |
| Possible Recipients | Sections (w/Assessment) | Section, Course, Department, Division |
| Linked to SLOs | Yes | Maybe |
| Linked to Assessment Results | Yes | No |
| Linked to Resource Request | No | Yes |
| Reporting | With Assessment Results | Filterable, Pivot |
| Editing after Submission | Yes | No |
| Creating Drafts | Yes | Yes |
| Primary Role in SI | Evidence | Result |

To find out more about Action Plans see the section on Action Plans below.

To create a Reflection Template to add to an Assessment, go to the **Strategic Planning** or **SLOs & Assessments** section in the **Assessments** tab and the **Reflection Templates** subsection.

Select the **New Reflection Template** button to create a new set of reflection questions.


In the screen provided, fill in the fields:




**Name & Description:** The name and description of the reflection template that will appear to the faculty and assessment designers.

**Add Question:** Each question will provide a text box for the Faculty to include their response. The results can be sorted by respondent or by the question.

When all questions have been added and arranged, then **Save.**

The Institution can set one of the Reflection Templates as the Default. This will appear automatically on all assessments. To set a Reflection as the default, select it and click **Mark as Default.**

## Setting up Assessments

There are two beginning points for setting up an assessment. One is to select SLO(s) from the **SLO Listings** tab and select **Create Assessment** from the **More** drop-down**.** This will create an assessment linked to the selected SLOs.

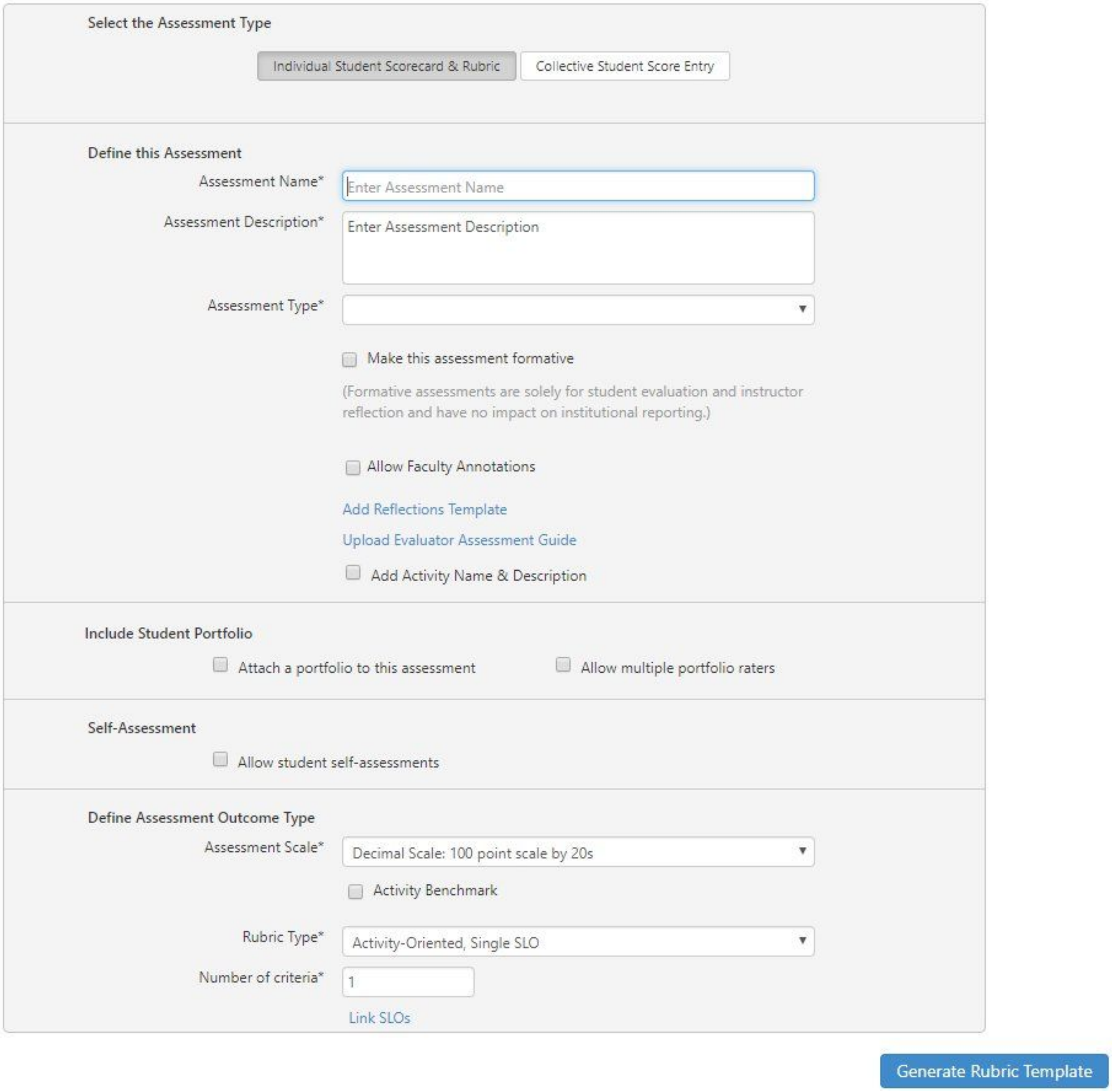
The other is to begin in the **Assessment** subsection and then select the **Add Assessment** button. In the second, the SLO(s) need to be specified. Access the Assessment Library from the **Strategic Planning** section or **SLOs & Assessments** section under the **Assessments** tab in the **Assessments** subsection.

Select **Add Assessment** at the top of the *Assessment* table.


## *Assessment Creation*

**Video:** https://ilos.video/A5Zm0S

When any user creates an assessment for the Assessment Library, Coordinators and Data Stewards can plan these assessments for any other programs, courses/contexts, and sections addressing those SLOs. In this way eLumen promotes the circulation of high quality assessments and crowd-sourcing the development of assessment.




**Select the Assessment Type -** Assessment can be created as "Individual Student Scorecard & Rubric" or "Collective Student Score Entry." Choose the appropriate type for the assessment being created, this cannot be changed once the assessment has saved.

### *Define This Assessment*

**Assessment Name and Description** – This is a name and description of the purpose of the assessment. Assessments should be broadly applicable such that over time and across sections, different faculty with different teaching styles can reuse the assessment and the associated rubric.

**Assessment Type** – The assessment type can be chosen from the drop-down menu and is established by the institution.

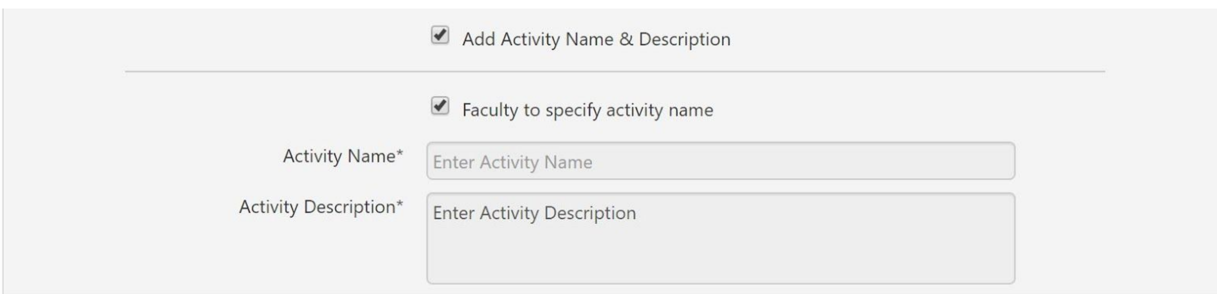
**Make this assessment formative** - Most assessment in eLumen is Summative. Summative assessments count for SLO performance reporting and faculty participation in assessment. Formative assessments do not count for any aggregate reporting, but can be used to give early feedback to students or for pre-test results.

**Faculty Annotations** - This option allows faculty to annotate assessments and SLOs for revision, student performance, or other significant purposes, inside eLumen for future reference.

**Evaluator Reflection Template** - The reflection templates designed in the previous section can be attached to the assessment using the **Add Reflection Template** link. Select a template from the list or create a new template, then select **Add.**

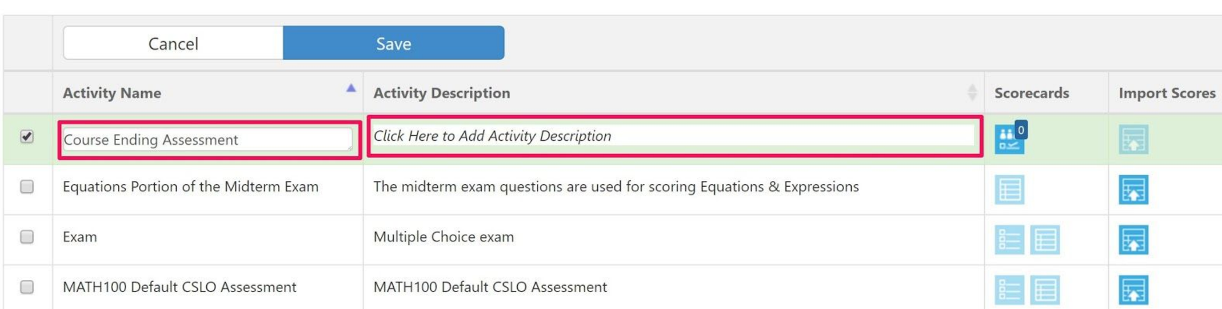
**Evaluator Assessment Guide** - The assessment guide will appear on the faculty scorecard and rubric for this assessment. Select **Upload Evaluator Assessment Guide** to add an assessment guide to the assessment.

**Add Activity Name & Description -** Selecting this option expands the assessment creation section for additional input.




**Faculty to specify activity name -** eLumen distinguishes the Assessment that the school is seeking versus the Activity that is given to students. Assessments created for the *Assessment Library* may have an Assessment Name and Assessment Description already established. Faculty can edit the name and description once it has been added to their sections. By selecting the assessment and **Edit Activity**, faculty can specify a name and description for the assessment that reflects the specific activity in their classroom.

If this option is deselected, the person creating the assessment can specify the **Activity Name** and **Activity Description**.



***Example:*** *The Accounting Department Coordinator designs an Ethics assessment that measures students' knowledge and application of ethical accounting practices and requests that faculty specify their Activity. They plan the assessment to all business courses. The Faculty member teaching Individual Tax Law specifies the Activity will be a short essay test on the legality and morality of tax shelters whereas the Faculty member teaching Applied Business Principles and Practices specifies the activity will be presentations on the impact of unethical practices in business.*

### *Self-Assessment*

**Self-Assessment** - For institutions with LTI integration or the Student Engagement and ePortfolio module, the school can check to **Allow students self-assessment** and then select **Add a Student Reflection Template**. Choose an existing reflection template or create a new one. Optionally, select **Upload a Student Assessment Guide** to attach an assessment guide that will appear to students through either an LTI integration or through eLumen's student system (for schools with the Student Engagement and ePortfolio module).

### *Define Assessment Outcome Type*

**Assessment Scale** – Choose the appropriate assessment scale for the rubric. ***Note:*** *The* Assessment Scale *cannot be edited once the* Generate Rubric Template *button is pressed.*

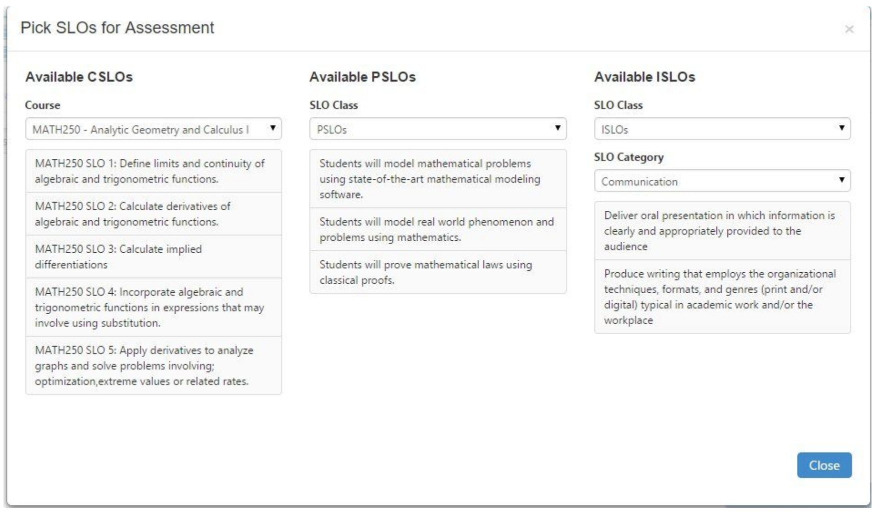
The **Number of criteria** or **Number of SLOs** options will change with the chosen **Rubric Type**. It is advisable to use the fewest rubric levels required to obtain the specificity needed.

**Rubric Type** – *Activity-Oriented* assessments permit Faculty to assess student work or activity using a carefully constructed rubric, putting emphasis on tailoring the performance descriptors to the assessment activity. See the table below for more information on the different types of Activity-Oriented assessments. An *Outcomes-Oriented* assessment permits Faculty to apply a single set of performance descriptors to each SLO assessed in a specific student activity, emphasizing shared performance criteria for any given SLO.

| Activity Oriented Type | Number of SLOs | Number of Rubrics |
|---|---|---|
| Single SLO | 1 | 1 |
| Multiple SLO | 1+ | 1 |
| Multi-Rubric | 1+ | 1 per SLO |

**Scoring Views** – Scoring Views are only available for an Outcomes-Oriented assessment. Activity-Oriented assessments only use the Rubric View. The *Scorecard and Rubric Views* allow Faculty to score individual students using either the *Scorecard*, which allows Faculty to quickly assign a score for each student on each SLO assessed, or the complete *Rubric*, which displays one student at a time with all performance descriptors and criteria visible. The *Collective Score Entry* option allows Faculty to score the number of students reaching each level of mastery on the assessment without assigning individual students a score. *Collective Score Entry* is useful for assessments of the college and its units but provides no information about the performance of individual students.

**Link SLOs** – This option is only available for *Activity-Oriented* assessments on the assessment creation screen. Select the *Link SLOs* hyperlink to open an interactive dialog box and choose the appropriate SLO(s). (See the box for an *Activity-Oriented, Multiple SLO* assessment below.) Find the appropriate SLOs in the grey columns using the drop-down menus and then select the SLO to assign it to the assessment. For *Activity-Oriented, Single SLO* assessments, choosing an SLO will close the dialog box. For *Activity-Oriented, Multiple SLO* assessments, choose all appropriate SLOs, which will move to the Assigned SLOs section in blue, then **Close**.

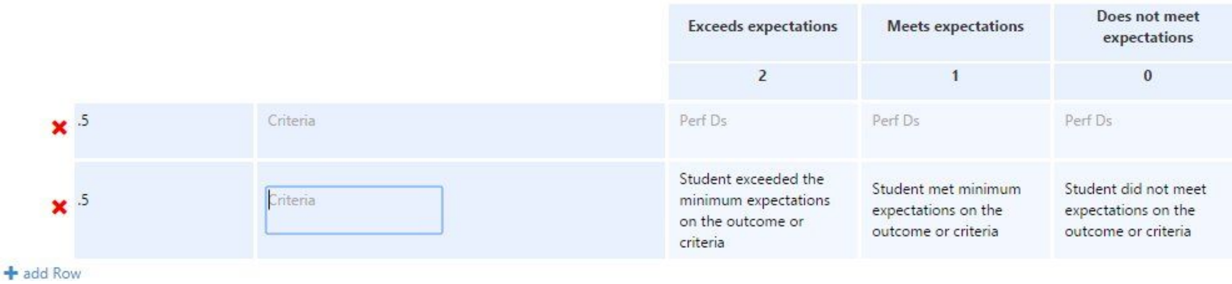



In an Outcomes-Oriented assessment, SLOs are linked in the rubric. At the time of assessment creation, indicate the **Number of SLOs** being assessed. This can be changed in the rubric by the **+ add Row** option.

When the assessment parameters have been determined, select **Generate Rubric Template** to begin designing the rubric. The rubric dialog box will appear below the assessment dialog box.

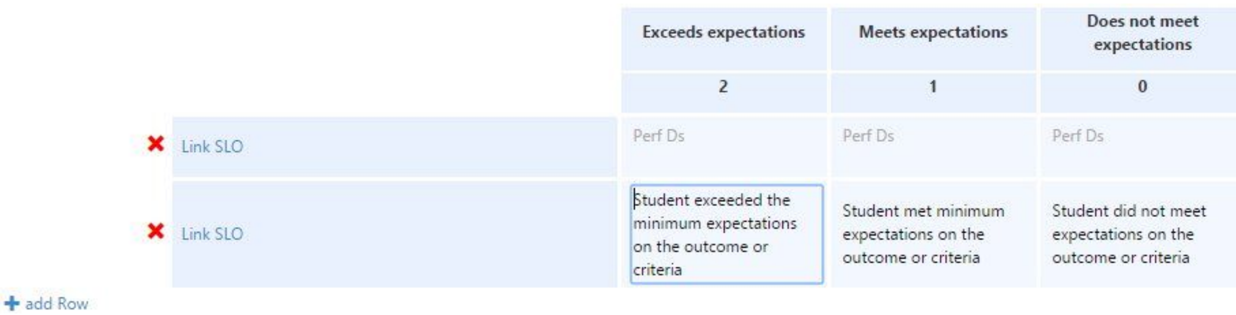
### *Activity-Oriented Rubric*

For an *Activity-Oriented* rubric, the rows will be Criteria for the rubric. The first column will automatically generate an even weight for each Criteria level. When adding additional Rows using the + *add Row* link, the assessment creator will need to adjust the weights. In the second column type or paste the criteria for the rubric.




## *Outcomes-Oriented Rubric*

For an *Outcomes-Oriented* rubric, the rows will be SLOs. Select the *Link SLO* hyperlink to open the same interactive SLO dialog box used for *Activity-Oriented* assessments.




## *Performance Descriptors*

Each Criterion or SLO in a rubric requires a *Performance Descriptor* for each *Assessment Scale Level.* High quality *Performance Descriptors* will increase the reliability of scoring so the wording should be carefully considered. Scale levels should be distinct from one another and should clearly describe the performance for that level. In addition, the levels should reflect the level descriptions provided by the *Assessment Scale*.

Some colleges will provide *Performance Descriptors* for SLOs. These will appear on *Outcomes-Oriented* assessments once the SLOs are selected.

To finish as assessment select **Save**.

Once an assessment has been saved, it appears in the list of Assessments. The Assessment table displays all of the shared assessments available for use in scoring students. Data Stewards and Coordinators can filter and search the visible assessments to locate and plan previously created assessment or use the Planner to plan an entire assessment cycle. Faculty can access the shared assessments through the **Find Assessment** button for their sections.

To find a specific assessment, use the filters to select the SLOs attached to the assessment, an Assessment Type for the assessment, and/or how the assessment is planned. When planning an assessment from the Planner or as a Faculty user in a section, eLumen will attempt to narrow the filters to fit the situation.

## Editing Assessments

Faculty can edit assessments they created and saved directly to a section or to their personal Assessment Library; visible under the “My Private Assessment” dropdown. **Faculty are not able to edit Shared assessments in the Assessment Library.** The ability to edit can be conducted in either the library view or the course/section view.

If student scores have **not** been input, the following elements of an assessment can be edited:

- Assessment Name
- Assessment Description
- Faculty Annotations can be enabled
- Reflection Template can be added but not exchanged
- Evaluator Assessment Guide can be uploaded

If LTI is enabled or the Student Engagement/ePortfolio module is used, the following can be edited:

- Student Self-Assessment can be enabled
- Student Reflection template can be added but not exchanged
- Student Assessment Guide can be uploaded

Assessments **cannot** be edited if any number of:

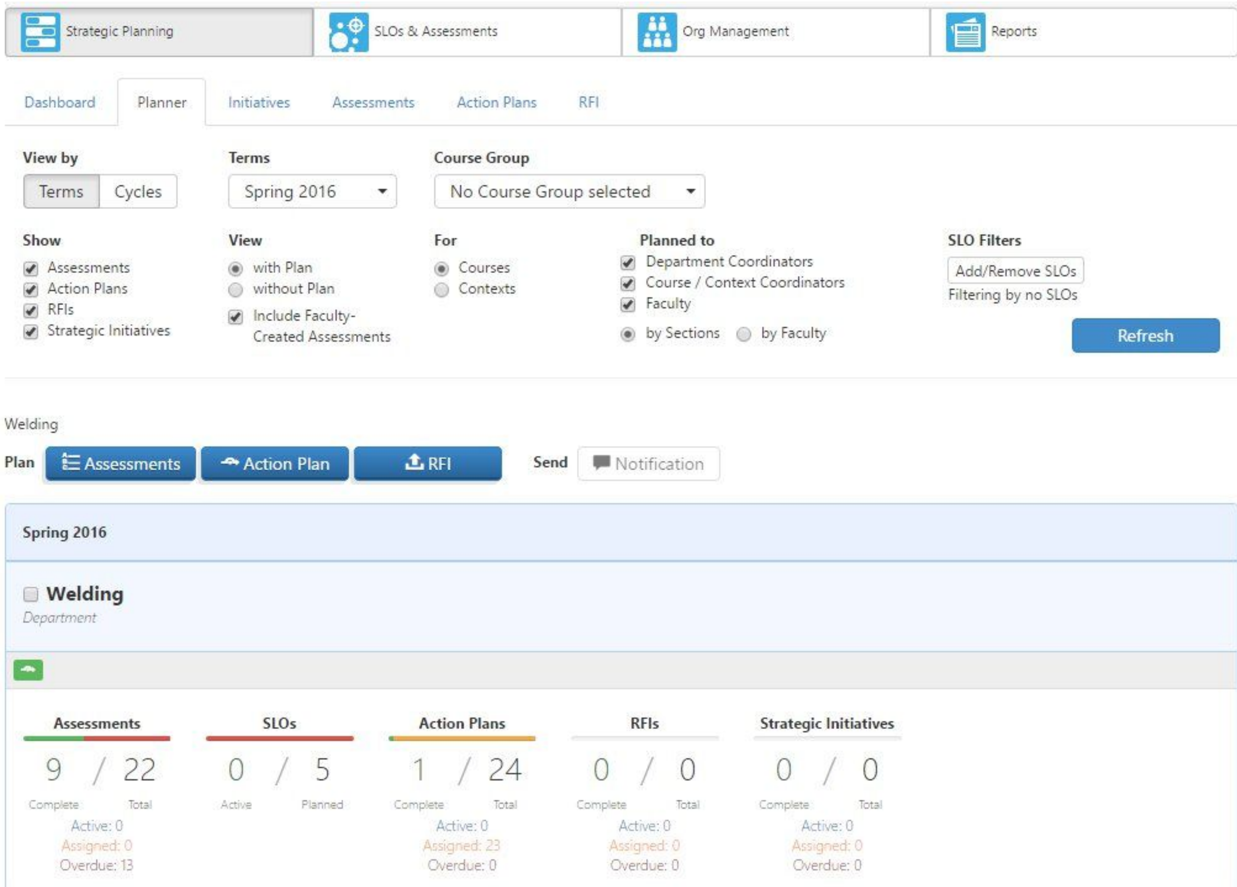
- Students have been scored by Faculty or Self-Assessment.
- Responses have been created to a Faculty Reflection.
- Responses have been created to a Student Reflection.
- Students have accessed a Portfolio assessment (applies only if using LTI or Student Engagement/ePortfolio module).

# The Planner

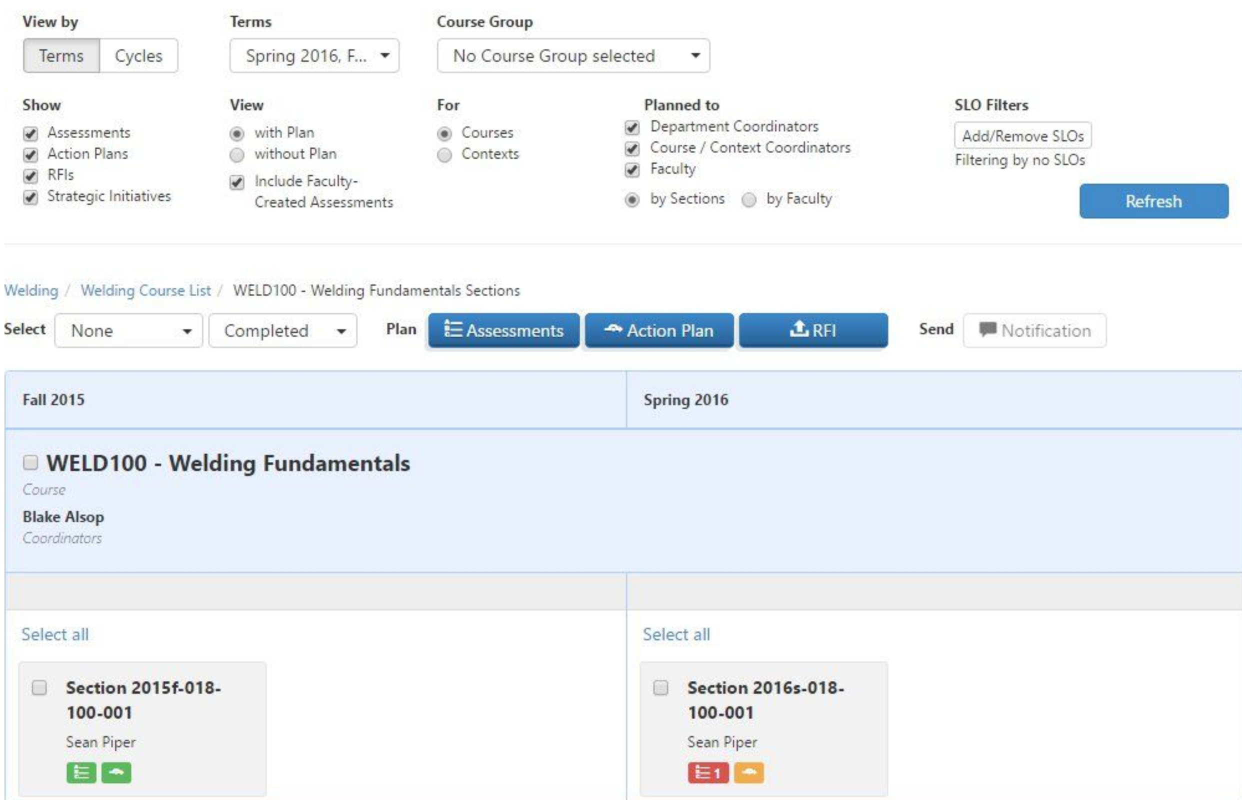
The Planner enables the planning and management of Assessments, Action Plans, and Requests for Information (RFI) over an entire cycle of assessment for all or select courses or sections in a Department. The Planner is a convenient one-stop planning and management feature for data collection items and allows for planning for current and future terms.

The Planner shows when data will be collected and allows for real-time tracking of assessment completion over a Cycle or set of terms.

To get to the Planner go to the **Strategic Planning** section and select the **Planner** tab.



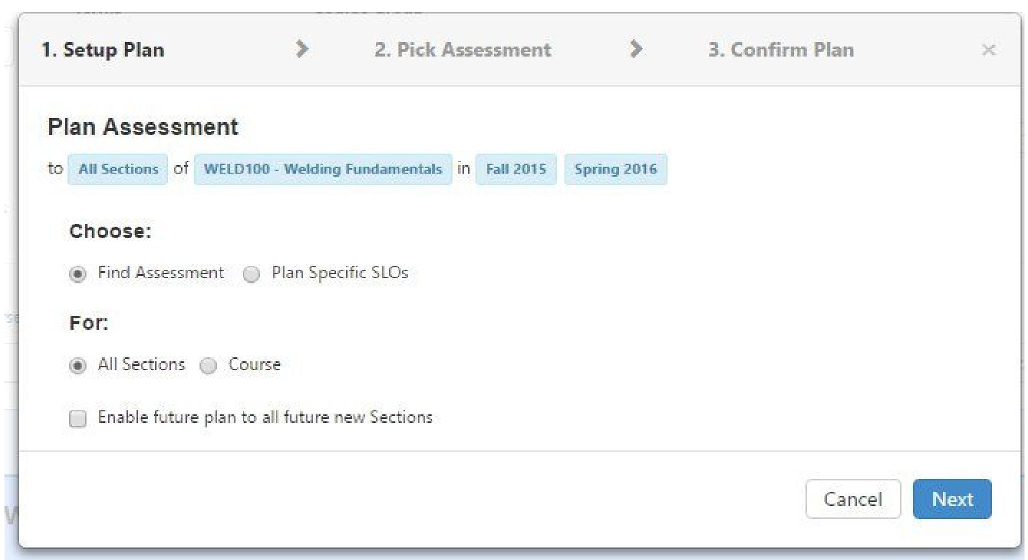

To begin a plan for assessing, action planning, or RFI, first set the filters to show the level and terms that will hold the plans. **Refresh** the page before proceeding. Next navigate through the planner by selecting inside the boxes for the divisions, departments, and courses to locate the organization that will receive the plan.




To assign to specific divisions, departments, courses, or sections, select those sections.

Finally, **select** and **drag** the appropriate button to the division, department, course, or sections. This will create a pop up that will guide you through the rest of the planning process.

## Planning for Assessment Scoring




**Choose:** The Planner offers two options for assessment scoring: planning a specific assessment or specifying certain SLOs that a section is expected to assess.

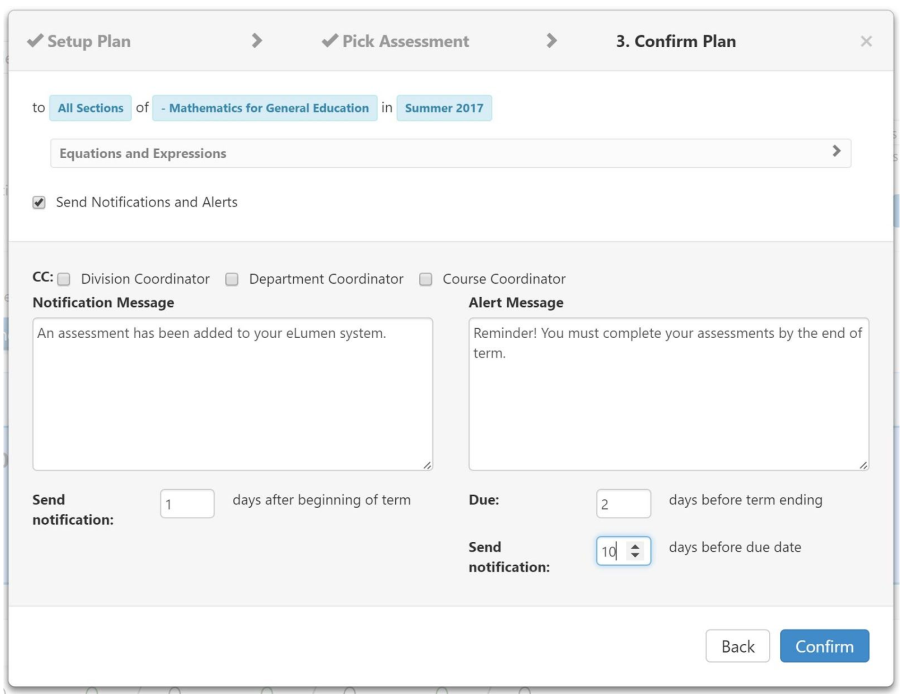
**For:** Depending on where the assessment icon was dropped, there may be an option to choose to send the assessment to all of the sections in the terms or to the course for a course-level collective score.

If you are planning for the future, or if more sections may be added to any term in the plan, select **Enable future plan to all future new Sections**.

Once this is complete, select **Next.**

If you would like to send emails to Faculty or Coordinators who will complete the assessment, then check **Send Notifications and Alerts** and fill in the boxes. The **Notification** is sent a specified number of days after the start of term and the **Alert** message acts as a reminder, sent out a specified number of days before the due date. If the dates for the Notification or Alert have already passed, they will be sent out immediately. Notification and Alert.

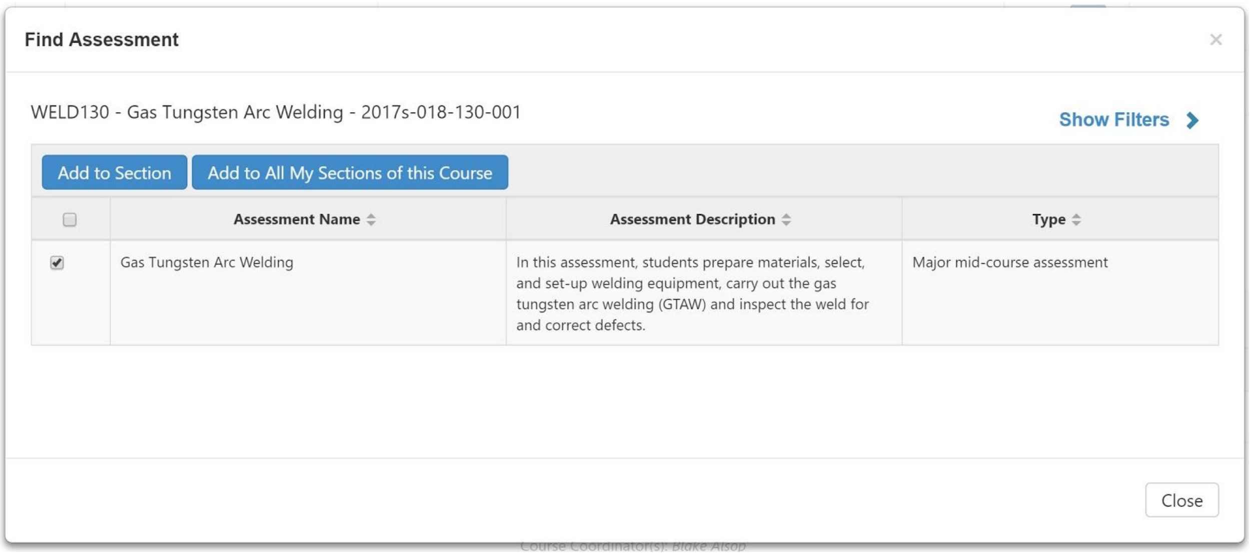
If a default notification has been entered into the system, it will populate the text areas. This text can be modified on the screen if needed. After selecting the Send and Due days, select **Confirm.**




## *Find Assessment*

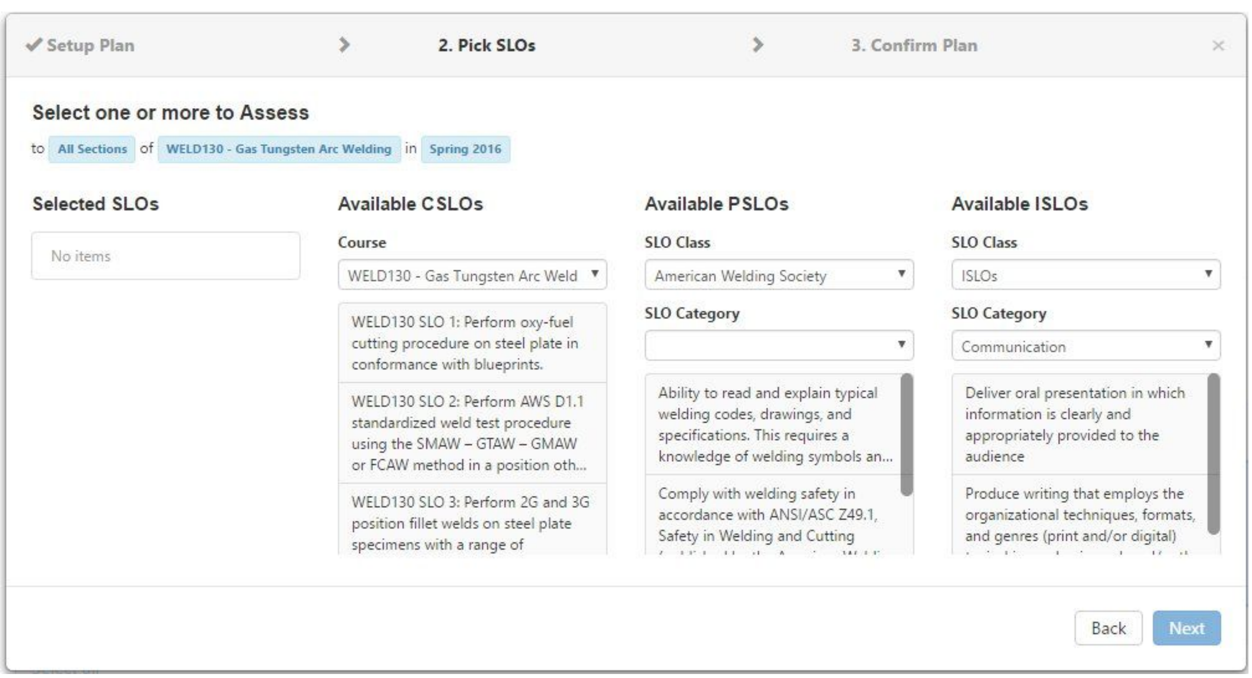
*Find Assessment* is a way of adding assessments to specific course sections. If planning a specific assessment using **Find Assessment**, the Find Assessment screen will open with assessments associated with the course using pre-selected filters based on the current

Department or Course. The filters can be changed to access a larger list of possible assessments. Select an assessment from the list by checking the box in the left column, then choose **Add to Section** or **Add to All My Sections of this Course**. The assessment will be added to the Course assessment list.

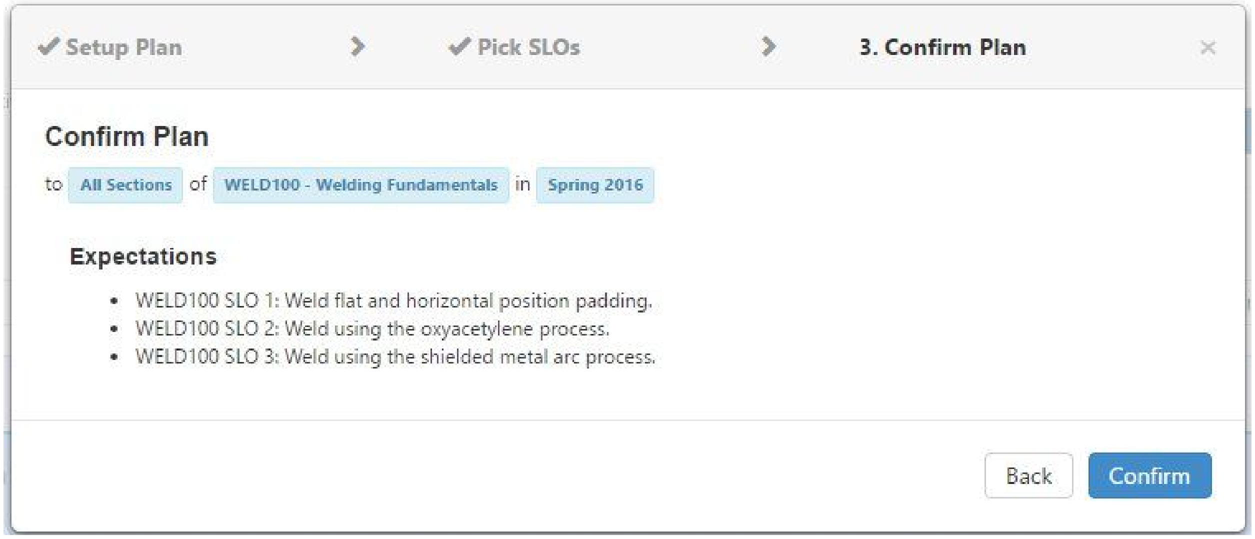



## *Plan Specific SLOs*

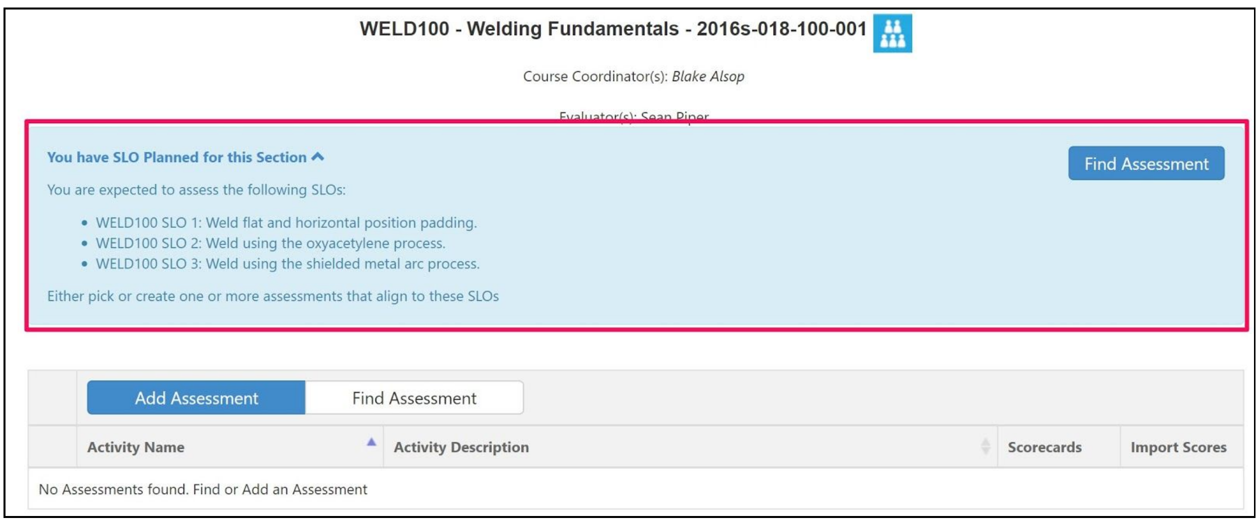
If planning Specific SLOs, the SLO selection screen will pop up. Select one or more SLOs from the list then select **Next.**




Finally, confirm the correct organization and SLOs are listed and select **Confirm.**

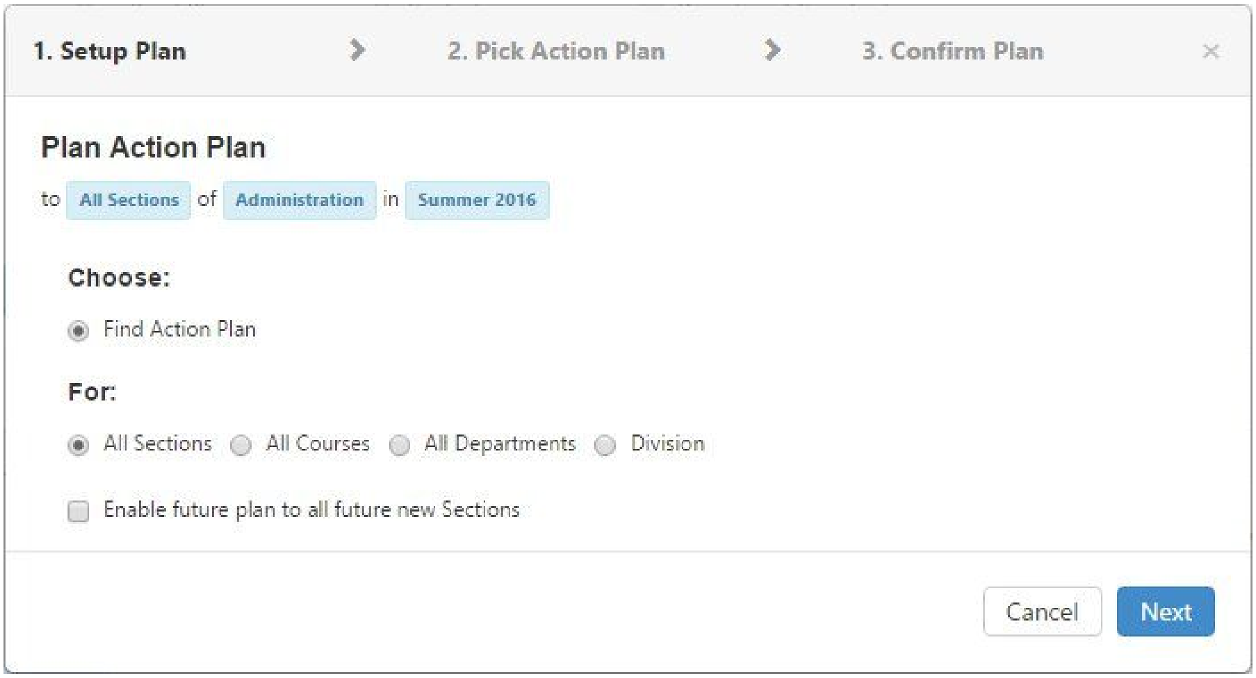



From the faculty viewpoint, faculty will see Planned SLOs in a box above their assessment listing in their course. They will either create one or more assessments to assess the expected SLO(s).




## Planning for Action Plans

When an **Action Plan icon** is dragged into a organization, the Action Plan pop-up appears.

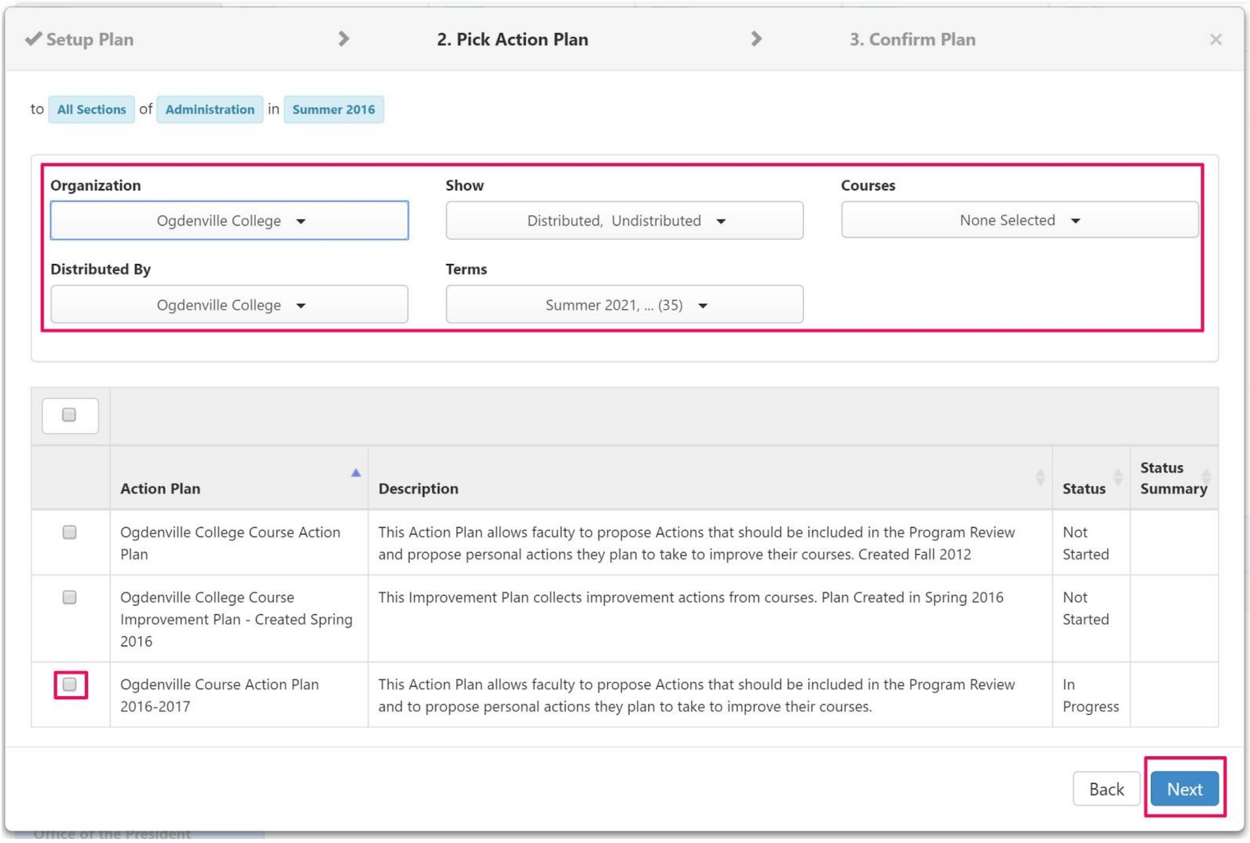



**For:** Depending on where the Action Plan icon was dropped, there may be an option to choose to send the assessment to all of the sections in the terms, all of the courses, all of the departments or to the division.

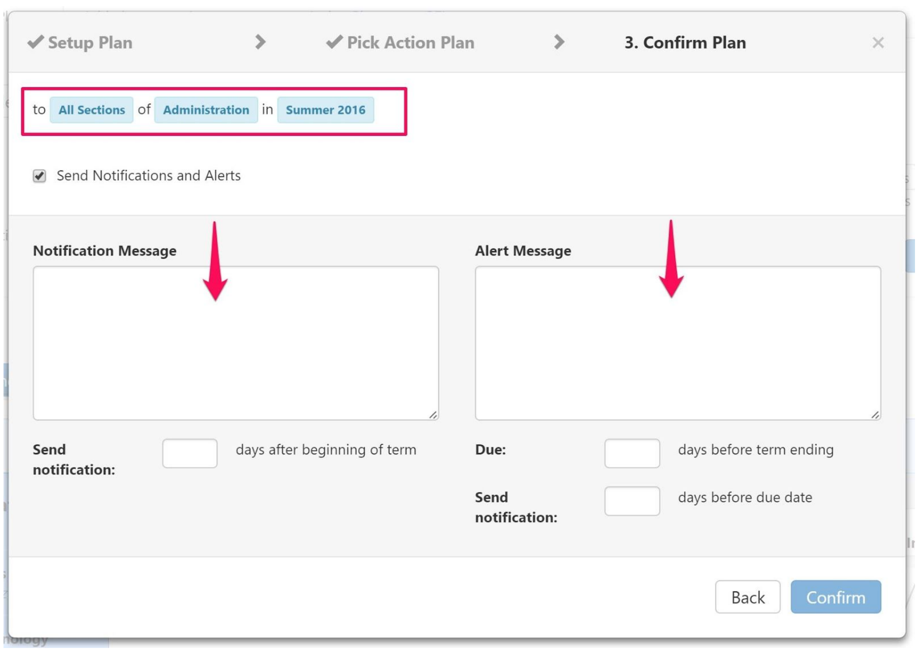
If you are planning for the future, or if more sections may be added to any term in the plan, select **Add this Action Plan to any new Sections added to included term**.

Once this is complete, select **Next.**

Use the filters to adjust the selection of Action Plans that display in the list. Select an Action plan by checking the box in the left column, and select **Next.**




Confirm that the correct organization and Action Plan are listed in the **"to"** line at the top.

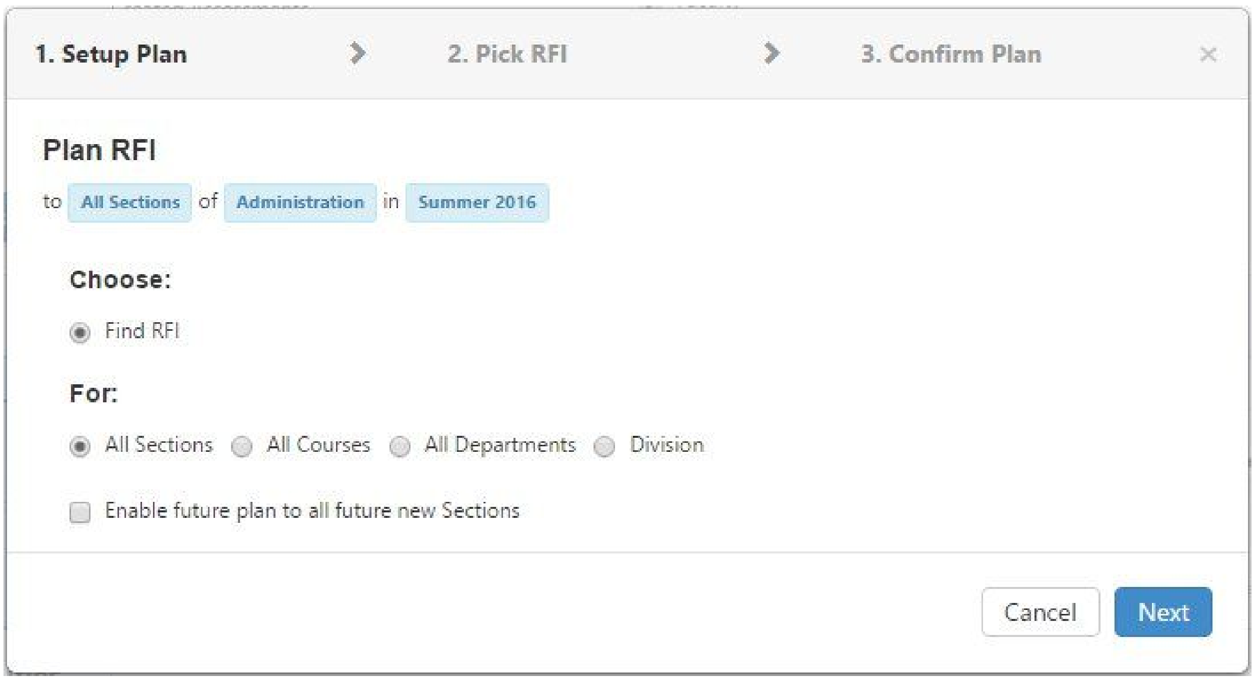



If you would like to send emails to the Faculty or Coordinator who will complete the Action Plan, then check **Send Notifications and Alerts** and fill in the boxes. The **Notification** is sent a specified number of days after the start of term and the **Alert** message acts as a reminder, sent RFI out a specified number of days before the due date. If the dates for the Notification or Alert have already passed, they will be sent out immediately.

Once this is all complete, select **Confirm.**

## Planning for RFI

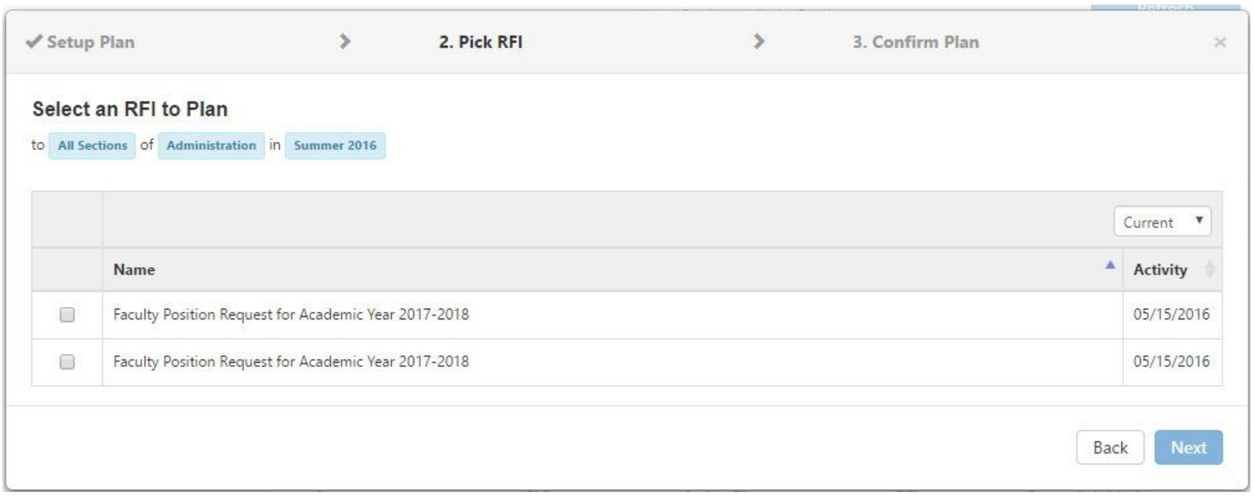
When an **RFI icon** is dragged into a organization, the RFI pop-up appears.




**For:** Depending on where the RFI icon was dropped, there may be an option to choose to send the assessment to all of the sections in the terms, all of the courses, all of the departments or to the division.

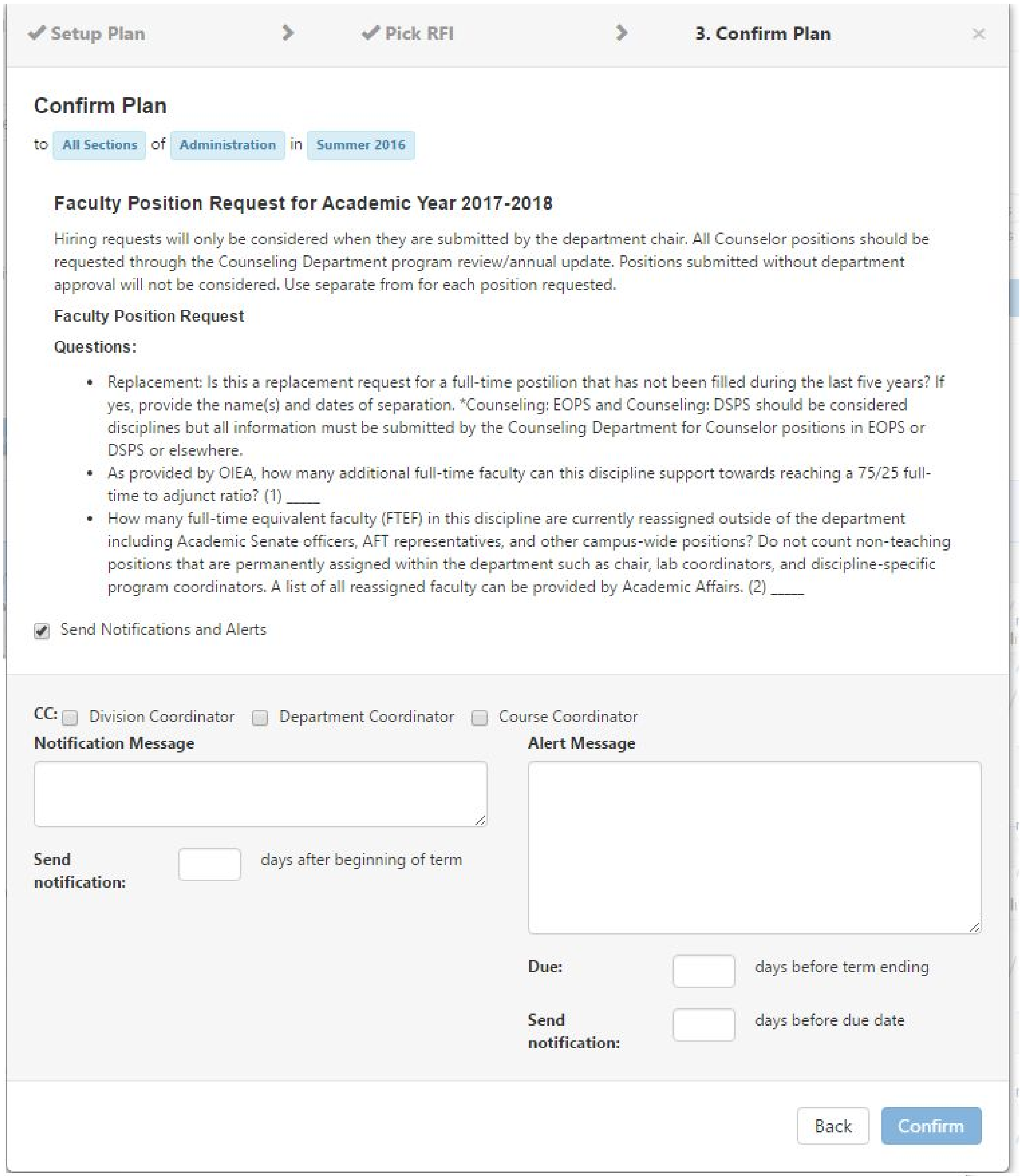
If you are planning for the future, or if more sections may be added to any term in the plan, select **Enable future plan to all future new Sections**.

Once this is complete, select **Next.**




Choose an RFI from the list and select **Next.**

Finally, confirm that the correct organization and RFI are listed.



✔ Setup Plan › ✔ Pick RFI › 3. Confirm Plan ×

## Confirm Plan

to All Sections of Administration in Summer 2016

**Faculty Position Request for Academic Year 2017-2018**

Hiring requests will only be considered when they are submitted by the department chair. All Counselor positions should be requested through the Counseling Department program review/annual update. Positions submitted without department approval will not be considered. Use separate from for each position requested.

**Faculty Position Request**

**Questions:**

- Replacement: Is this a replacement request for a full-time postilion that has not been filled during the last five years? If yes, provide the name(s) and dates of separation. *Counseling: EOPS and Counseling: DSPS should be considered disciplines but all information must be submitted by the Counseling Department for Counselor positions in EOPS or DSPS or elsewhere.
- As provided by OIEA, how many additional full-time faculty can this discipline support towards reaching a 75/25 full-time to adjunct ratio? (1) ____
- How many full-time equivalent faculty (FTEF) in this discipline are currently reassigned outside of the department including Academic Senate officers, AFT representatives, and other campus-wide positions? Do not count non-teaching positions that are permanently assigned within the department such as chair, lab coordinators, and discipline-specific program coordinators. A list of all reassigned faculty can be provided by Academic Affairs. (2) ____

☑ Send Notifications and Alerts

CC: ☐ Division Coordinator ☐ Department Coordinator ☐ Course Coordinator

**Notification Message**

**Send notification:** days after beginning of term

**Alert Message**

**Due:** days before term ending

**Send notification:** days before due date

Back Confirm

If you would like to send emails to the Faculty or Coordinator who will complete the RFI, then check **Send Notifications and Alerts** and fill in the boxes. The Notification is sent a specified number of days after the start of term and the Alert message acts as a reminder, sent out a specified number of days before the due date. If the dates for the Notification or Alert have already passed, they will be sent out immediately.

Once this is all complete, select **Confirm.**

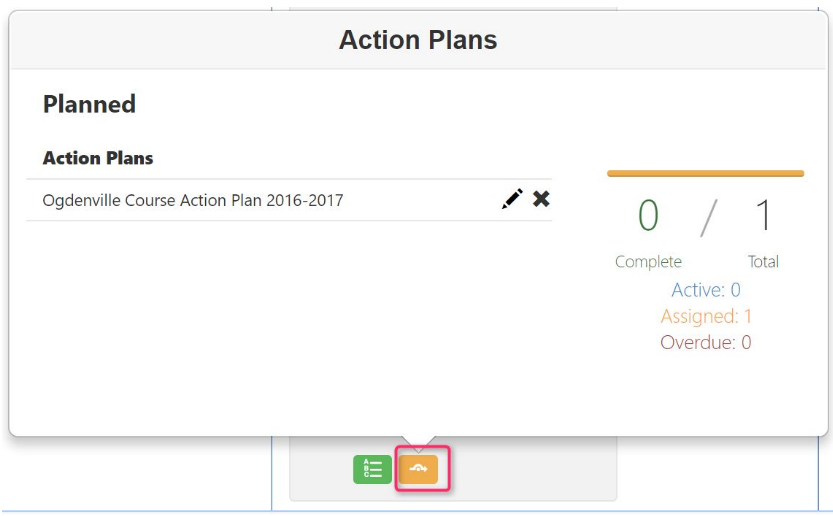
## Removing a Plan

The Planner is also used to remove a planned Assessment, SLO, Action Plan, or RFI.

### *Remove a past or current Plan*

To remove a past or current Plan, locate the Division, Department, Course, or Section with the plan and hover over the appropriate icon for the Assessment or SLO, Action Plan, or RFI.

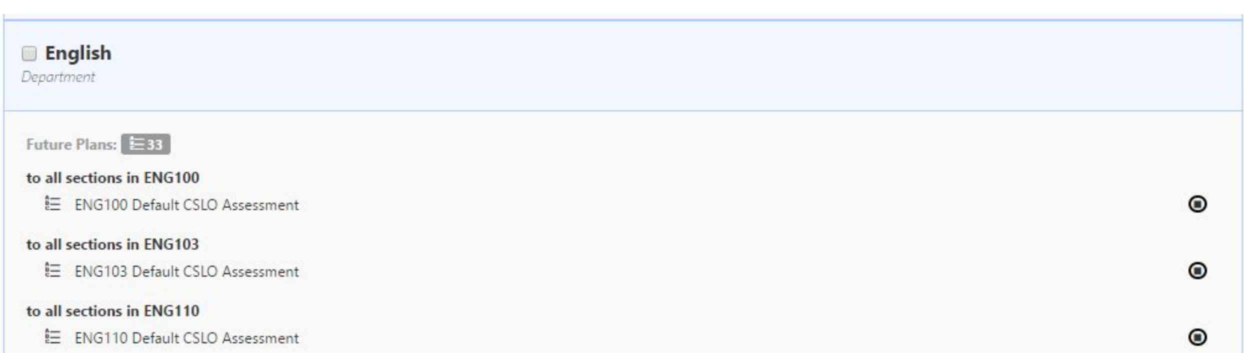
In the pop-up box, select the **X** next to the plan you want to stop, then **Delete.** The Action Plan will be immediately deleted without further warning prompts.




***Note:*** *Removing the plan for a completed Assessment, Action Plan, or RFI will remove the data associated with that response.*

### *Remove a future Plan*

To remove a future Plan, locate the Division, Department, Course, or Section with the plan.



Select the **Stop icon** next to the plan you want to stop then **Remove.**

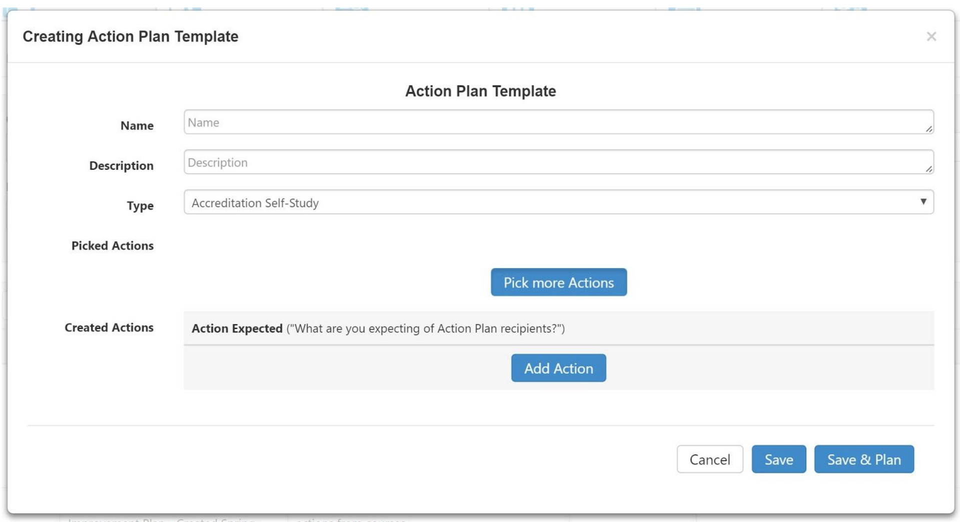
# Action Plan

Action Plans allow initiative creators to easily track and distribute improvement *Actions* and receive progress feedback and resource requests from faculty, staff, and administrators.

## Setting up Action Plans

To begin an *Action Plan* under the **Strategic Planning** section, open the **Action Plans** tab select **Add Action Plan.**

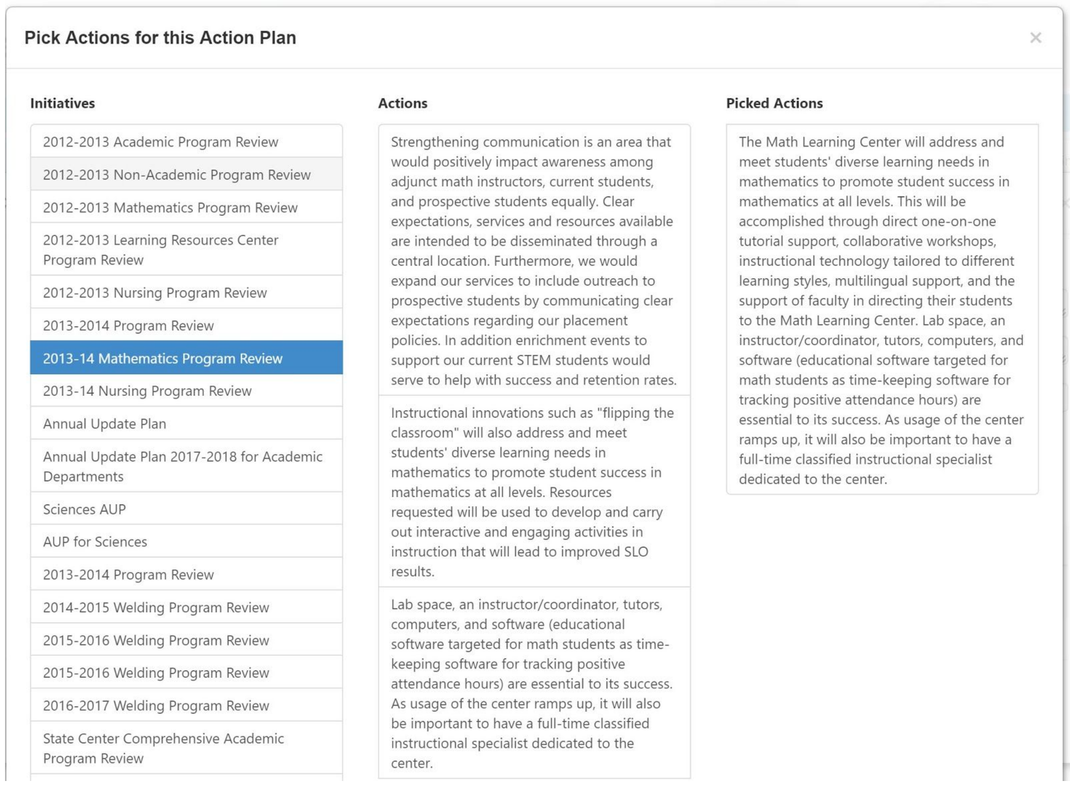
The *Creating Action Plan Template* dialog box will pop-up on the screen.




**Name** and **Description** – This is a name and description of the purpose of the *Action Plan Template*. Like assessments, *Action Plan Templates* can be distributed, redistributed, and edited as needed.

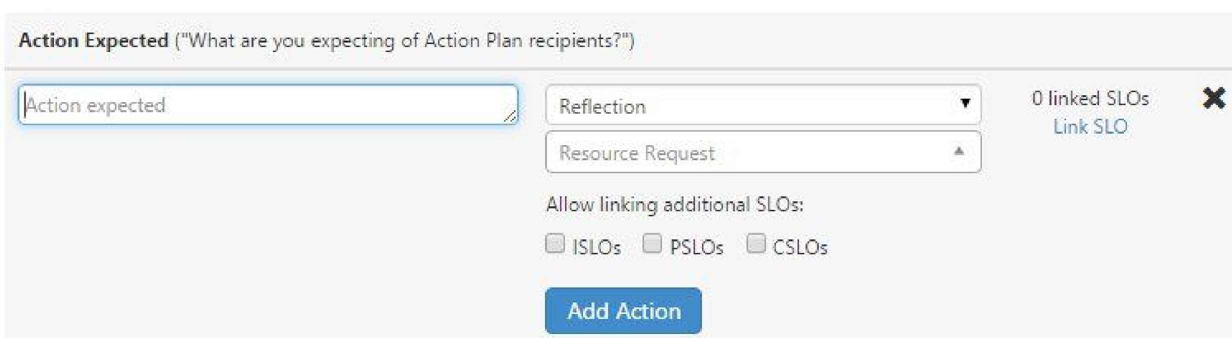
**Type** – This field is to choose the type of action plan being created. The types are set up in System Settings section, the Initiative sub-tab, and then Action Plan and Initiative Types; and determined by the institution.

**Picked Actions** – This field allows the creator to incorporate *Actions* from one or more *Strategic Initiatives* and link them to this action plan. Select Pick more Actions to choose from previous Initiatives. When complete, select **Close**.




**Created Actions** – This field allows the creator to add additional actions, which are not included in an *Initiative*.

Actions picked from an Initiative are automatically linked to that initiative's SLOs and the Action Type assigned within the initiative.




*Created Actions* can be assigned an Action Type and SLOs. The creator can allow faculty to make Resource Requests to each Action customizing the resources available from those provided by the Data Steward and allow Faculty and Coordinators to attach a document using the *Enable attachments* checkbox. To link an SLO to the *Expected Action* text use the **Link SLO** link. To allow respondents to link SLOs to their responses, check the box for **ISLOs, PSLOs,** or **CSLOs.**

Select **Save** to create the Action Plan Template. Select **Save & Plan** if the role permits use of the

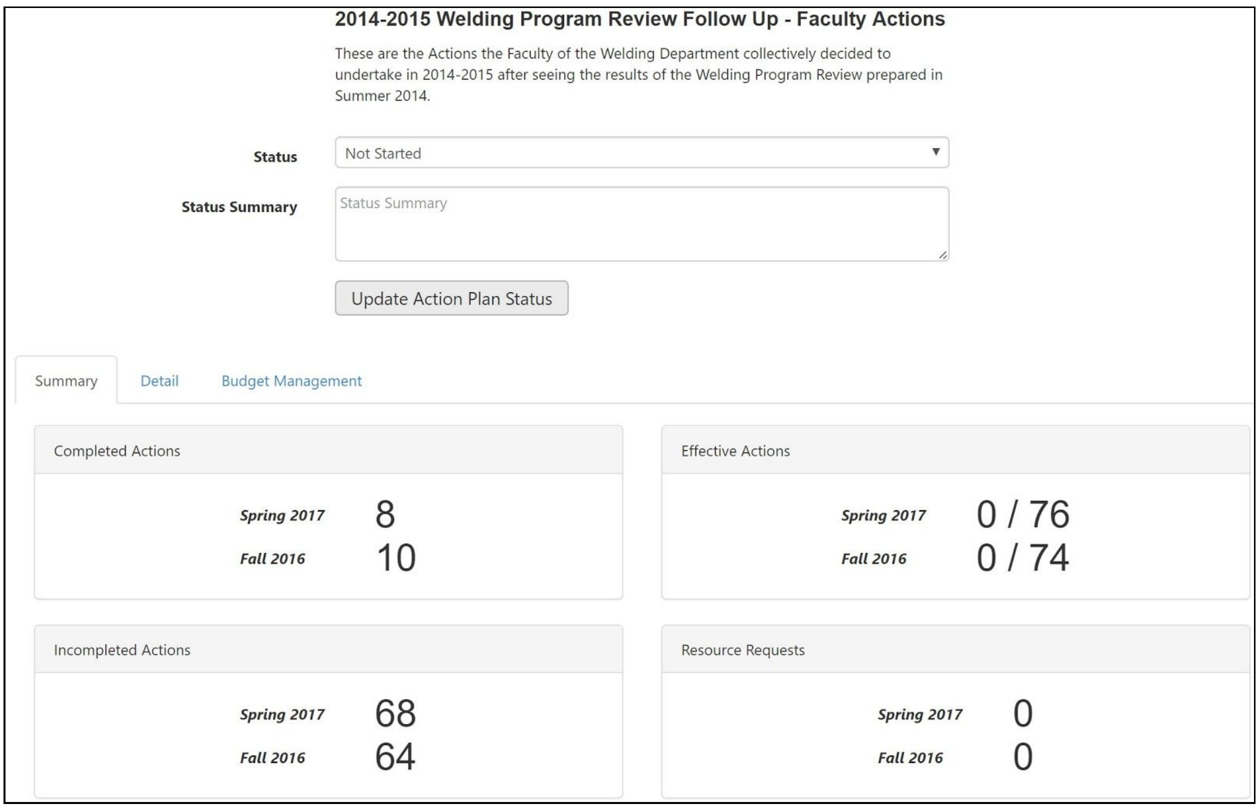
Planner. This option will open the Planner for further processing.

Action Plans can be planned from the Action Plan or Planner tabs.

## Managing Action Plan Responses

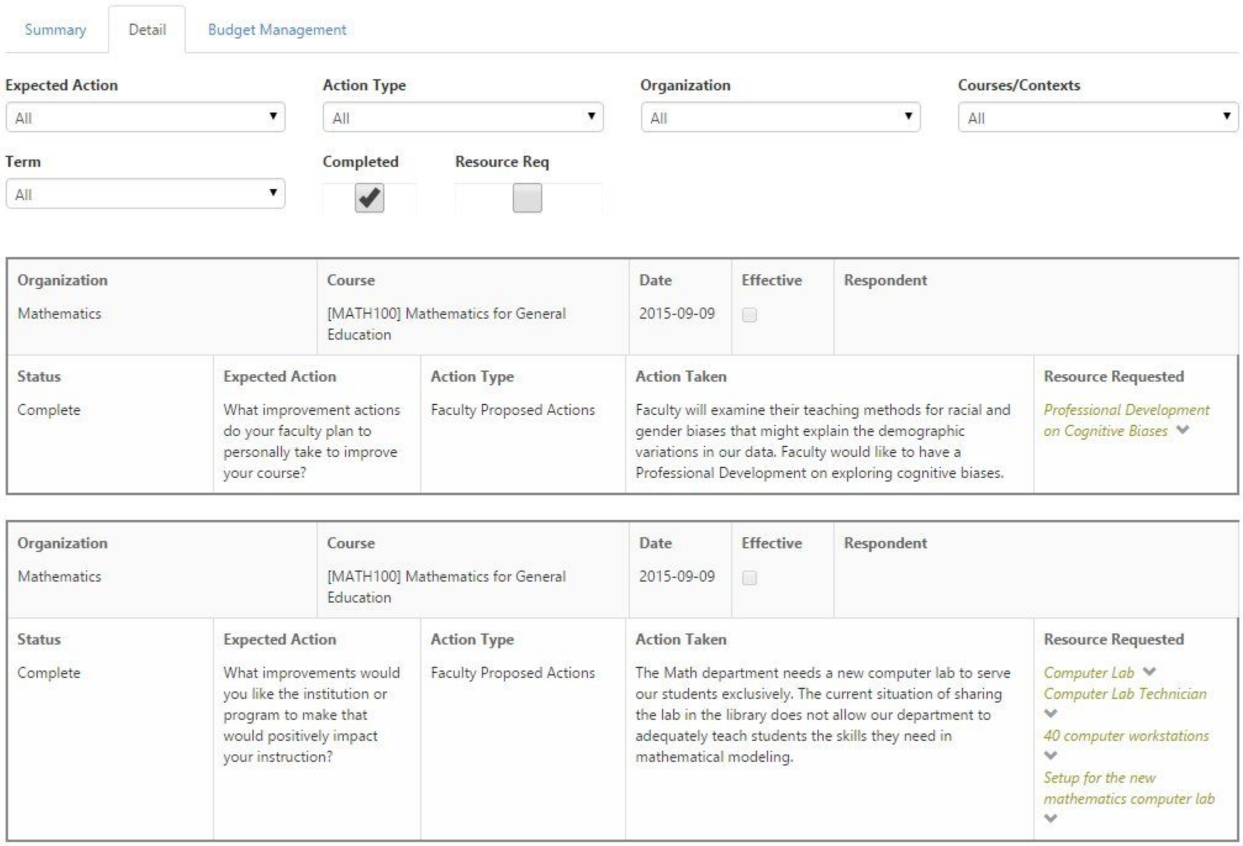
Responses to *Actions* are aggregated on the creator's *Action Plan* management dashboard.

Coordinators can manages Action responses under the **Strategic Planning** section, open the **Action Plans** tab. Use the filters to locate an Action Plan. The Institution and each Division and/or Department can own Action Plans. Institutional Action Plan results will only show responses from the Coordinator's department, program, or course. From the list of Action Plans select one by checking the box in the left column and select **Summary** in the top of the table.



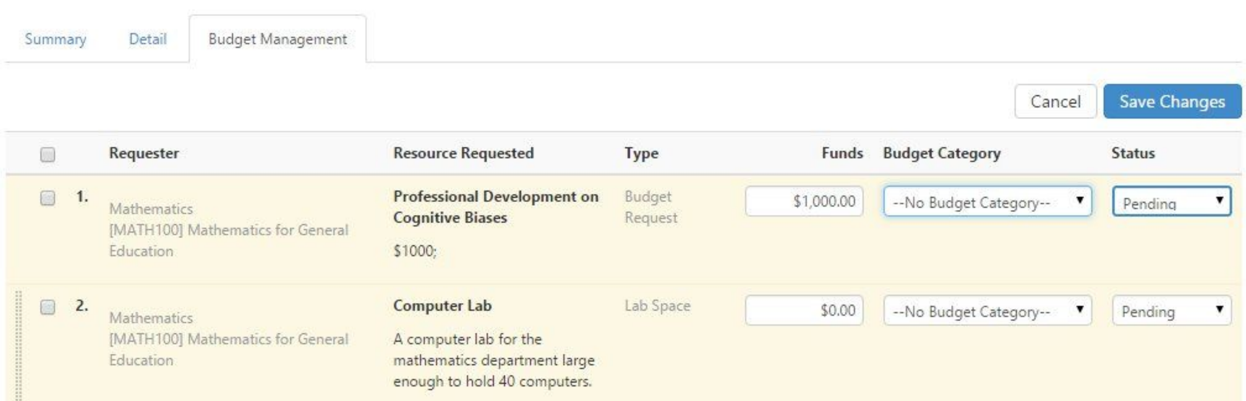

The top of the *Action Plan Dashboard* displays the title and description of the *Action Plan* and allows the creator to track the overall **Status** of the *Action Plan* and provide a **Status Summary**. To save changes to the status, select **Update Action Plan Status**

The *Action Plan Dashboard* has three tabs. The first tab summarizes the progress of the *Actions* within the plan. Selecting the **Details** tab allows management of individual actions and view responses. If the *Action Plan* was distributed to multiple sections, courses, or programs then the *Expected Actions* will be duplicated for each section, course, or program. Filter the list of actions by requirements or status.




Within the **Details** tab, responses and the status of resource requests can be viewed. In addition, individual actions can be marked as **Effective**. This permits the tracking of A*ctions* that worked well within the college or what responses from faculty members were successfully completed.

The third tab is the **Budget Management** where the Coordinator can manage the resource requests sent from respondents and assign them to *Budget Categories.*




Requests can be selected and dragged to prioritize. When finished with any changes, then **Save Changes.**

# Request for Information

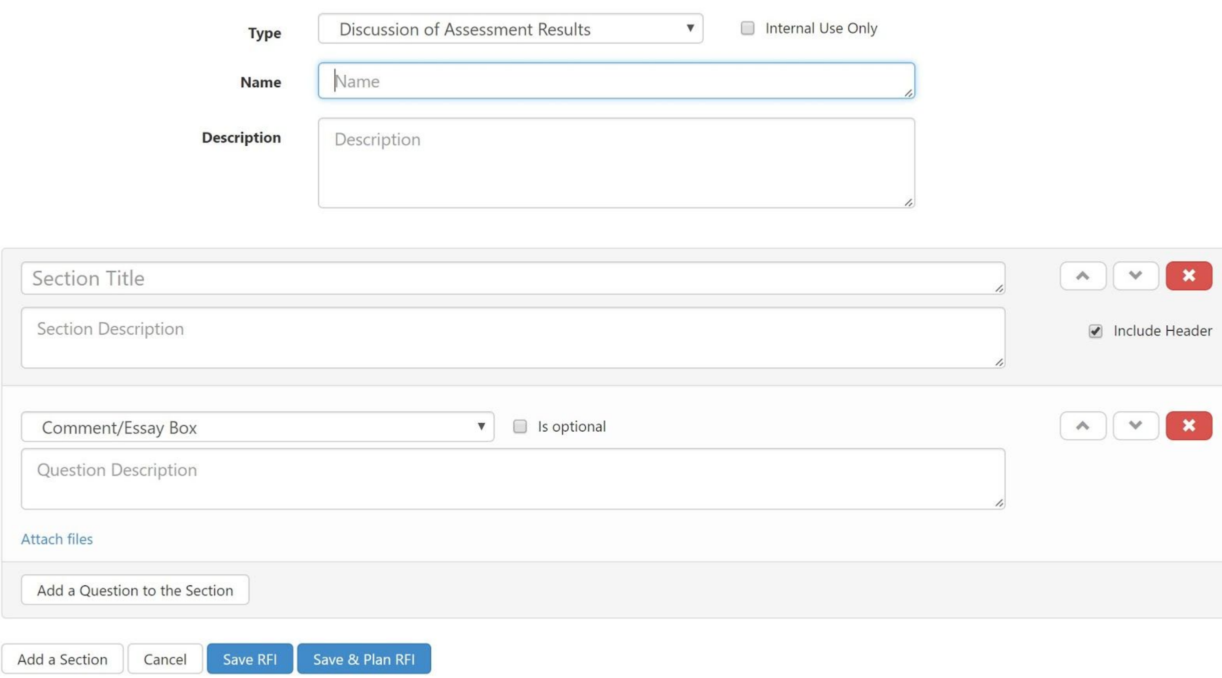
A Request for Information (RFI) is a way to collect non-assessment evidence from faculty for *Initiatives*. RFI create surveys for faculty and can collect documents all within eLumen creating a trail of evidence of faculty discussion.

## Setting up Requests for Information

An RFI is similar to other Internet survey systems. It can contain multiple choice, short answer, or document upload questions.

Before creating an RFI, ensure you are within the Org Entity that will own the RFI. To create a *Request for Information* (RFI), go to the **Strategic Planning** section and open the **RFI** tab and select **Add RFI.**

The *RFI Creation Screen* allows a Data Steward or Coordinator to design an *RFI Template* form that can be reused or adapted as needed.



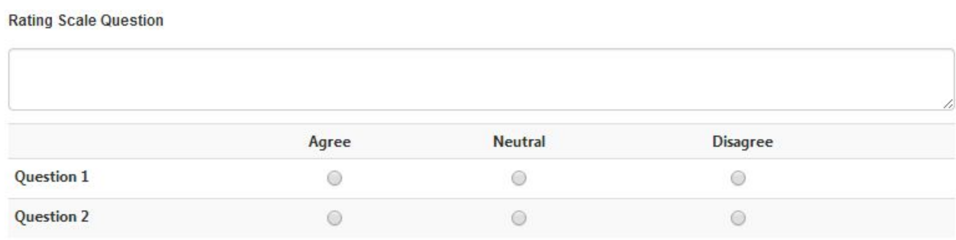

At the top fill in the **Type**, **Name,** and **Description** for the RFI Template. Check **Internal Use Only** if the RFI should not appear on accreditation and program review reports.

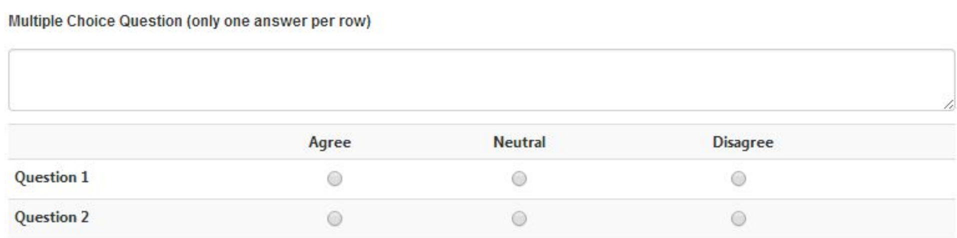
Under that, design the *RFI Response Form*. Questions are organized into Sections with optional Headers. There are 5 question options:

- Multiple Choice (multiple answers per row)
- Multiple Choice (only one answer per row)
- Comments/Essay Box

- Upload Document
- Rating Scale

The *Multiple Choice* and *Rating Scale* options allow the RFI designer to create question tables (see below), and choice if any questions should be optional for respondents.

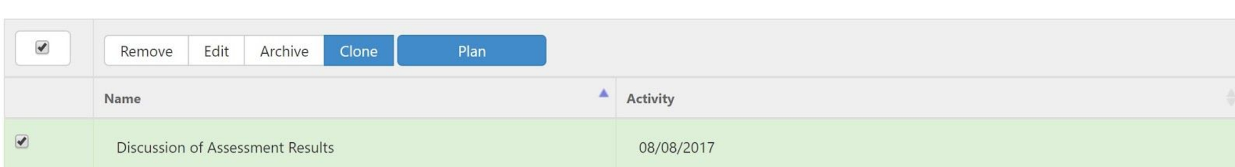




***Example:*** *The Accounting Department wants to survey their faculty to find out who would be interested in developing and teaching a business ethics course and who is qualified to teach a course in business ethics. They create and distribute an RFI with one multiple choice, single answer question that has 2 rows for interest and experience and 5 columns from Strongly Disagree to Strongly Agree. They also include an open-ended question for faculty to describe a proposed course and a document request for faculty to upload a proposed syllabus if they have one.*

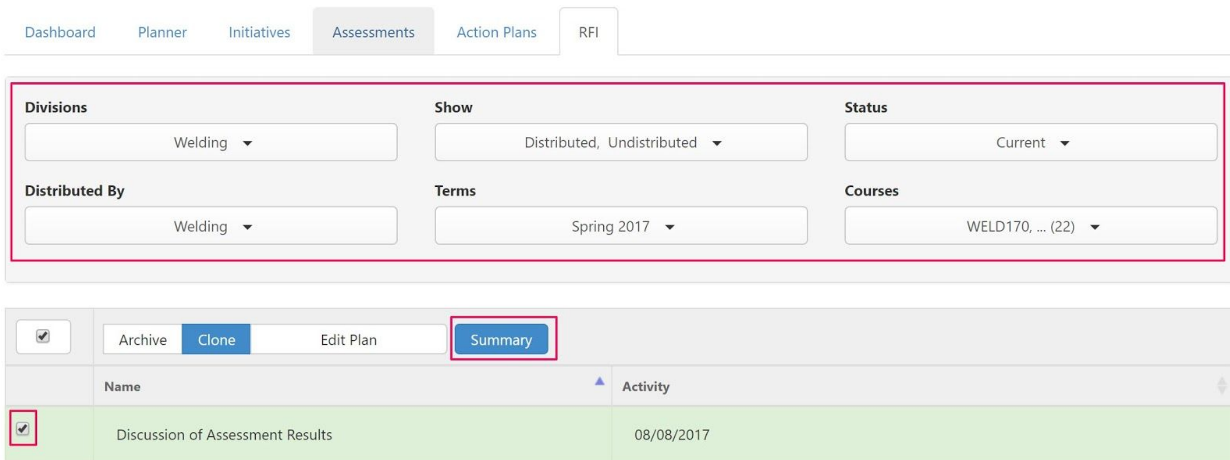
After an RFI is finished with all questions added, either select **Save RFI** to save the template, or **Save & Plan RFI** to immediately plan the RFI using the Planner.




To plan the RFI from the table, select the RFI and choose **Plan**. The Planner will open and the process can continue.

## Review Results of an RFI

To review the results of a *Planned RFI*, go to the **Strategic Planning** section, then the RFI sub-tab. Use the filters to refine the search. **Select** the RFI from the list and then choose **Summary** and review the responses and a list of respondents.

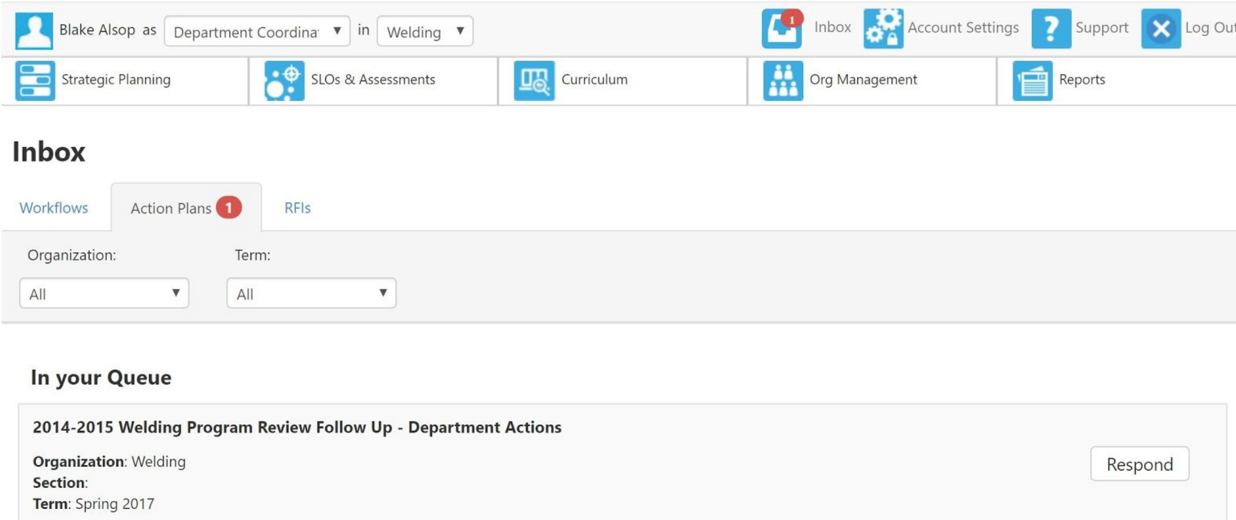



# Collecting Data for a Program or Department

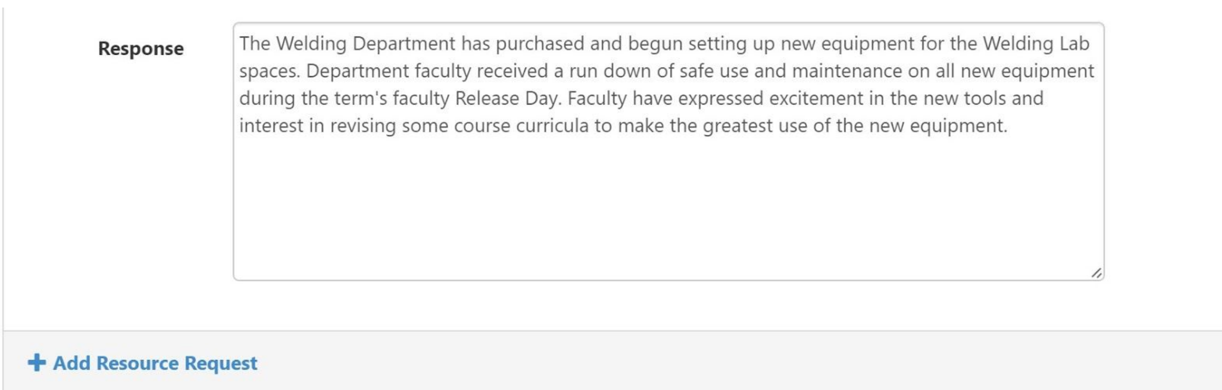
Within eLumen, there is a hierarchy of roles where roles with a wider area of responsibility can Distribute Action Plans and RFI to roles with narrower areas of responsibility. The role hierarchy is Data Steward -> Department Coordinator -> Program Coordinator -> Course/Context Coordinator -> Faculty. Coordinators can respond to Action Plans or RFI through their eLumen Inbox or through the **Courses** or **Org Management** section.

## Action Plan

After planning an Action Plan, recipients will receive an email notice, an item in their eLumen Inbox, and for Coordinators, an item in their **Courses** or **Org Management** section.




Selecting the **Inbox icon**, the **Action Plans tab,** then the appropriate action plan from the *Action Plans* list, choose the **Respond** button. A response screen will appear. For each action in the plan, respondents provide a **Response** describing their activities to complete the stated action. When complete, scroll to the bottom of the form and select **Submit**.




Respondents can also add a Resource Request if applicable to complete the action. Select **+ Add Resource Request** and include the following information:

**Resource Name** - This will be displayed to the originator of the *Action Plan*.

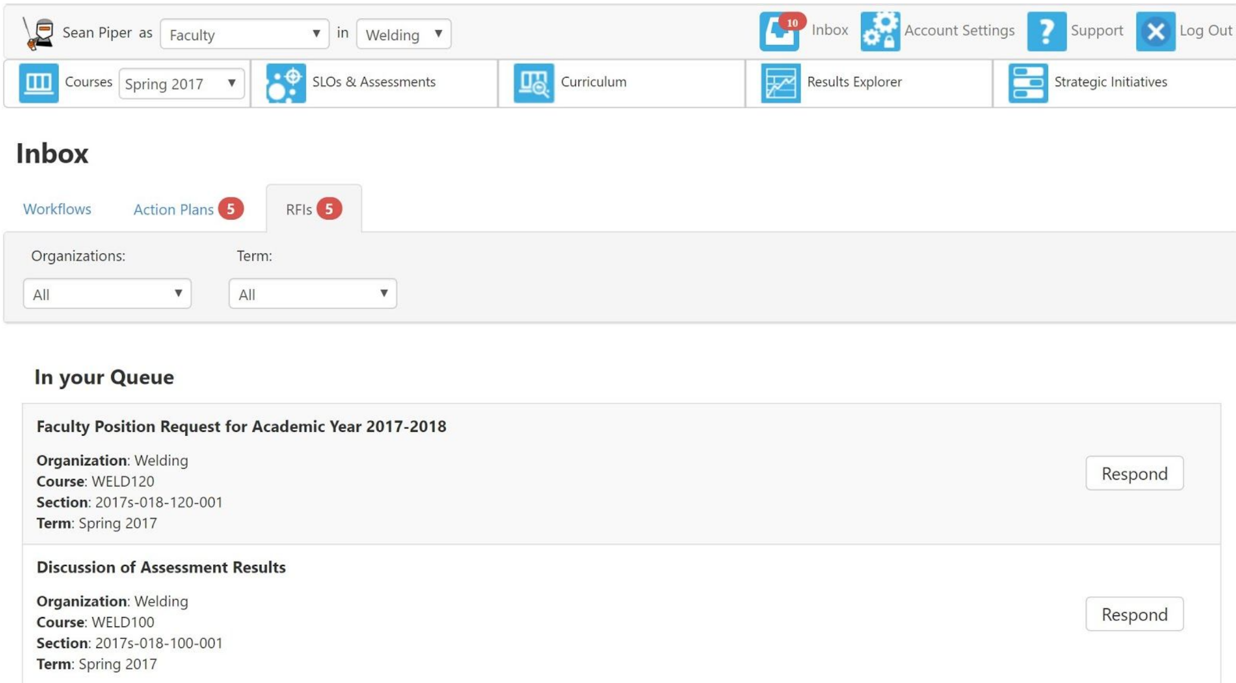
**Resource Type** - Choose a type from the drop-down list populated by the Data Steward's **Initiative Settings**.

**Resource Detail** - This is an area for notes that are only displayed to the responder.

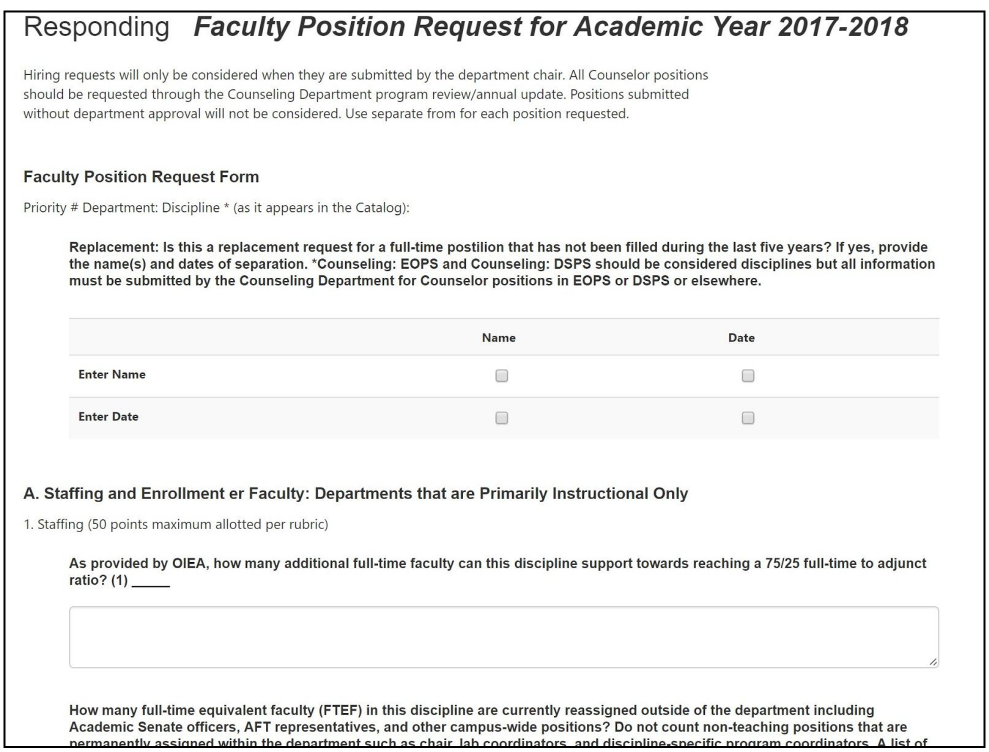
After responding to all Actions, select either **Save as Draft** or **Submit**.

## Request for Information (RFI)

After planning an RFI, recipients will receive an email notice, an item in their eLumen Inbox, and, for Coordinators, an item in their **Courses** or **Org Management** section.




Selecting the **Inbox icon,** the **RFI tab,** and then choosing **Respond** associated with the appropriate RFI, the RFI will appear on the screen. Answer each question by selecting or typing a response.

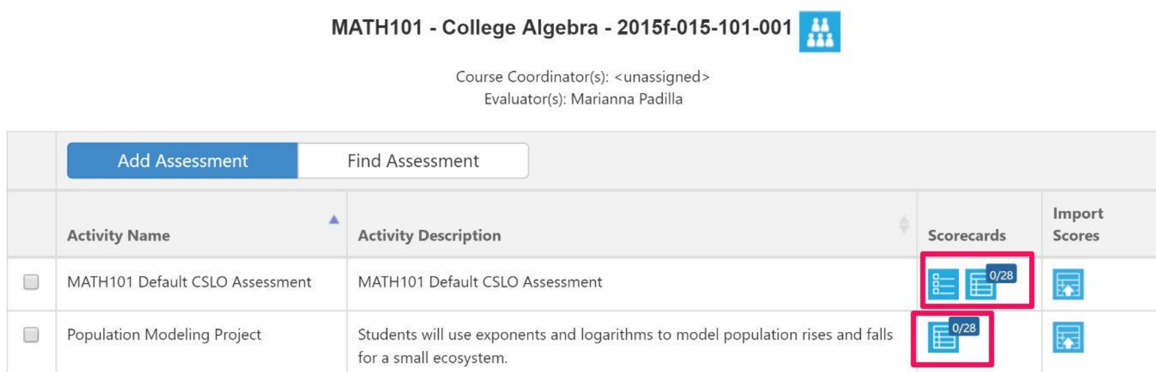


When finished responding to all questions, select **Send Response** at the bottom of the screen. If more time is needed to complete the form, choose **Save a Draft**.


## Faculty View

This training provides a preview of the Faculty role within eLumen so Coordinators and Data Stewards understand the effect of their actions within eLumen. eLumen respects the autonomy of faculty members so by default only evaluators have access to section level data.

Assessments for each section are listed in the table below the section heading. To score an assessment select the scoring icon in the right column of the table.




**Video:** [Outcomes-Oriented Per Student Scoring](https://ilos.video/h4rADU), [https://ilos.video/h4rADU](https://ilos.video/h4rADU)

*Rubric View* 

To score an individual student assessment with *performance descriptors*, select  . The icon indicates the number of student scores needed.

***Note:*** *Rubric View is the only view available for Activity-Oriented Assessments. Rubric View is the recommended starting point for per student scoring with an Outcomes-Oriented Assessment to refresh the evaluator's memory of the scoring rubric.*

*Rubric view* shows the entire rubric for **one student at a time**. The current student is highlighted in the *student table* on the left and listed at the top of the *rubric table.*

To guide scoring, the *rubric table* shows the assessed *SLOs* or *criteria* in each row, the *mastery levels* in each column, and *performance descriptors* in each cell.

## Rubric for College Algebra: 2015f-015-101-001

Actions ▾

***Assessment Name:*** *MATH101 Default CSLO Assessment*

***Assessment Description:*** *MATH101 Default CSLO Assessment*

***Assessment Type:*** *Default Course-Ending Assessment*

**Scoring: *Alsop, Ian***

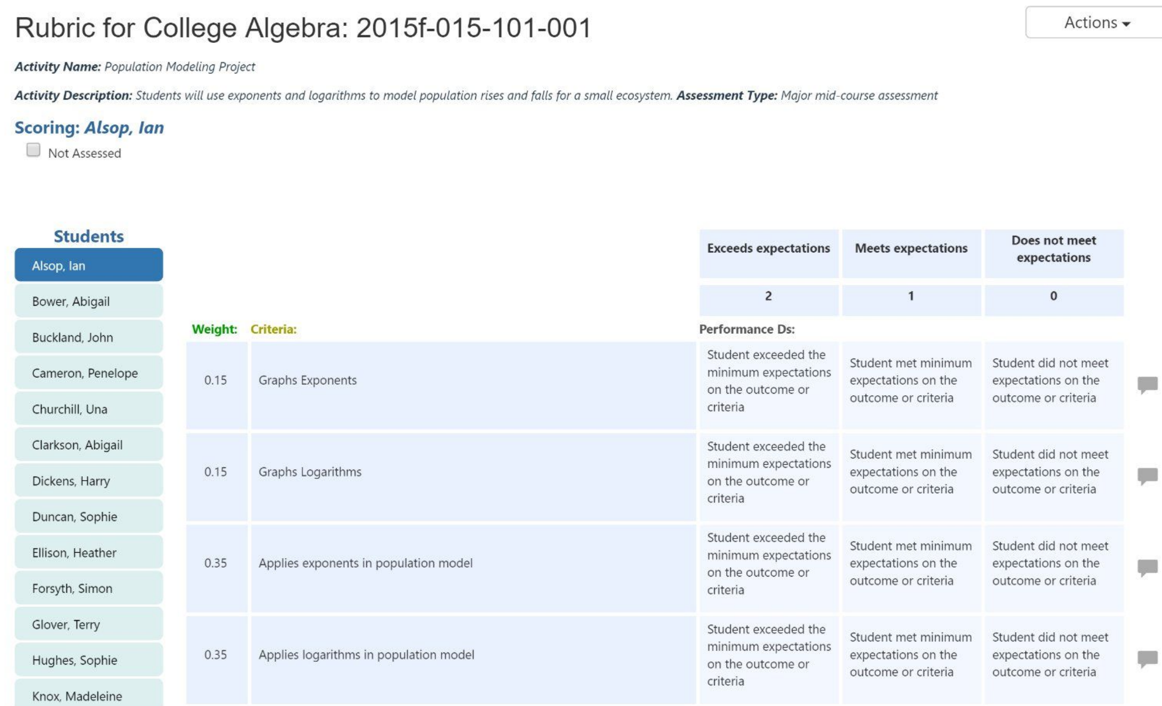
**Students**

- Alsop, Ian
- Bower, Abigail
- Buckland, John
- Cameron, Penelope
- Churchill, Una
- Clarkson, Abigail
- Dickens, Harry
- Duncan, Sophie
- Ellison, Heather
- Forsyth, Simon
- Glover, Terry
- Hughes, Sophie
- Knox, Madeleine
- Lee, Emily

| | Exceeds expectations | Meets expectations | | Does not meet expectations | | |
|---|---|---|---|---|---|---|
| | 4 | 3 | 2 | 1 | 0 | N/A |
| SLO: | Performance Ds: | | | | | |
| MATH101 SLO 1: Solve various algebraic equations. | With greater than 80% accuracy, students can solve various algebraic equations. | With less than 80% accuracy, students can solve various algebraic equations. | With less than 60% accuracy, students can solve various algebraic equations. | With less than 40% accuracy, students can solve various algebraic equations. | With less than 20% accuracy, students can solve various algebraic equations. | |
| MATH101 SLO 2: Display algebraic solutions using graphing techniques. | With greater than 80% accuracy, students can demonstrate the value of elementary graphing techniques. | With less than 80% accuracy, students can demonstrate the value of elementary graphing techniques. | With less than 60% accuracy, students can demonstrate the value of elementary graphing techniques. | With less than 40% accuracy, students can demonstrate the value of elementary graphing techniques. | With less than 20% accuracy, students can demonstrate the value of elementary graphing techniques. | |
| MATH101 SLO 3: Analyze the zeros of polynomials using theorems of algebra. | With greater than 80% accuracy, students can use theorems of algebra to analyze the zeros of polynomials. | With less than 80% accuracy, students can use theorems of algebra to analyze the zeros of polynomials. | With less than 60% accuracy, students can use theorems of algebra to analyze the zeros of polynomials. | With less than 40% accuracy, students can use theorems of algebra to analyze the zeros of polynomials. | With less than 20% accuracy, students can use theorems of algebra to analyze the zeros of polynomials. | |
| MATH101 SLO 4: Apply exponential and logarithmic functions. | With greater than 80% accuracy, students can understand and apply exponential and logarithmic functions. | With less than 80% accuracy, students can understand and apply exponential and logarithmic functions. | With less than 60% accuracy, students can understand and apply exponential and logarithmic functions. | With less than 40% accuracy, students can understand and apply exponential and logarithmic functions. | With less than 20% accuracy, students can understand and apply exponential and logarithmic functions. | |

To score the current student, select the box that represents the appropriate *performance descriptor* for each *SLO*.

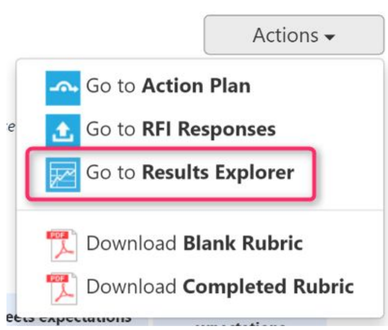
For Activity-Oriented assessments, the *rubric table* shows the *weights* and assessed *criteria* in each row.




After scoring all criteria, eLumen provides a weighted average recommended score and allows faculty to choose a final score.

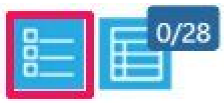

When finished grading a student, select the **Save and Next** button under the *rubric table* to move onto the next student.

Select the **Actions** button in the top right of the *rubric table* and choose **Go to Results Explorer** to view aggregate scores students from that section. eLumen will automatically save your scores when you navigate to another eLumen page.



## *Scorecard View* 

To quickly score an Outcomes-Oriented assessment, select the scorecard icon.




The first column lists students registered in the course.

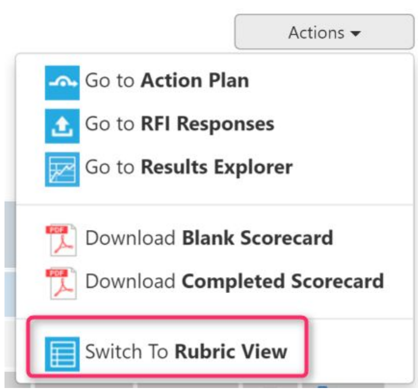
For each student the second column lists all assessed *SLOs* or *criteria.*

| | Exceeds expectations | Meets expectations | | Does not meet expectations | | |
|---|---|---|---|---|---|---|
| **SLO** | **4** | **3** | **2** | **1** | **0** | **N/A** |
| *MATH101 SLO 1: Solve various algebraic equations.* | 4 | 3 | 2 | 1 | 0 | ☐ |
| *MATH101 SLO 2: Display algebraic solutions using graphing techniques.* | 4 | 3 | 2 | 1 | 0 | ☐ |
| *MATH101 SLO 3: Analyze the zeros of polynomials using theorems of algebra.* | 4 | 3 | 2 | 1 | 0 | ☐ |

Select the appropriate rubric value for each SLO or criteria in the right part of the table to assign the grade to a student.

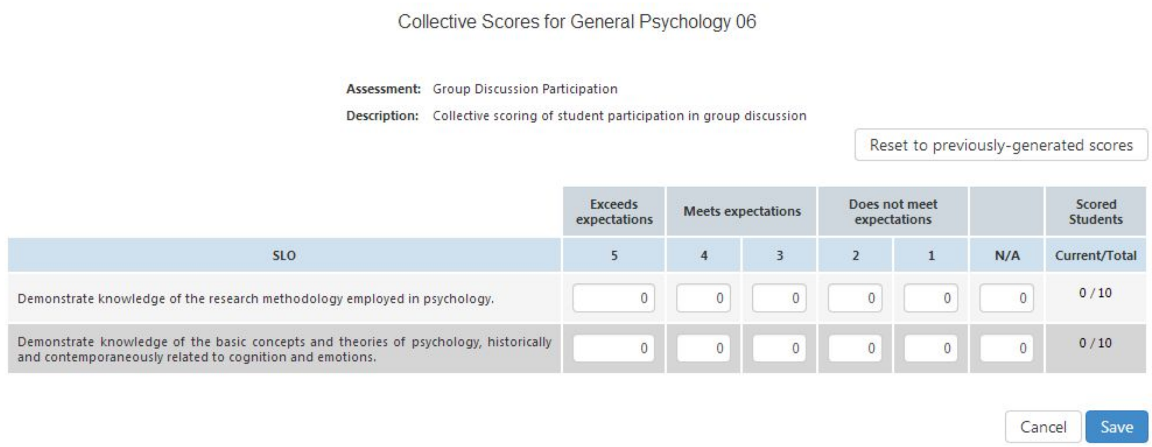
When finished grading all students, select the **Save** button at the bottom of the screen. Select **Save and Continue to Reflection** to complete the reflection template associated with the assessment.

Select the **Actions** button at the top right of the screen and choose Switch to Rubric View to view *performance descriptors for the SLOs.* eLumen will automatically save your scores when you navigate to another eLumen page.



## *Collective Score Entry*

To score a collective assessment click the *collective scoring icon*. 

Collective Scores for General Psychology 06

**Assessment:** Group Discussion Participation
**Description:** Collective scoring of student participation in group discussion

Reset to previously-generated scores

| | Exceeds expectations | Meets expectations | | Does not meet expectations | | | Scored Students |
|---|---|---|---|---|---|---|---|
| SLO | 5 | 4 | 3 | 2 | 1 | N/A | Current/Total |
| Demonstrate knowledge of the research methodology employed in psychology. | 0 | 0 | 0 | 0 | 0 | 0 | 0 / 10 |
| Demonstrate knowledge of the basic concepts and theories of psychology, historically and contemporaneously related to cognition and emotions. | 0 | 0 | 0 | 0 | 0 | 0 | 0 / 10 |

Cancel Save

Each row is an *SLO* and each column is an *assessment level* and *mastery level.*

Enter the number of students scoring at each assessment level for each SLO. If your school has entered a roster of students, eLumen will check that all students are accounted for in the scoring. If your school has not entered a roster of students, check the box at the bottom of the scoring table to indicate you have completed scoring.

Then select **Save.** You must select save from the collective score entry page or entered scores will be lost.

## Action Plans & RFI

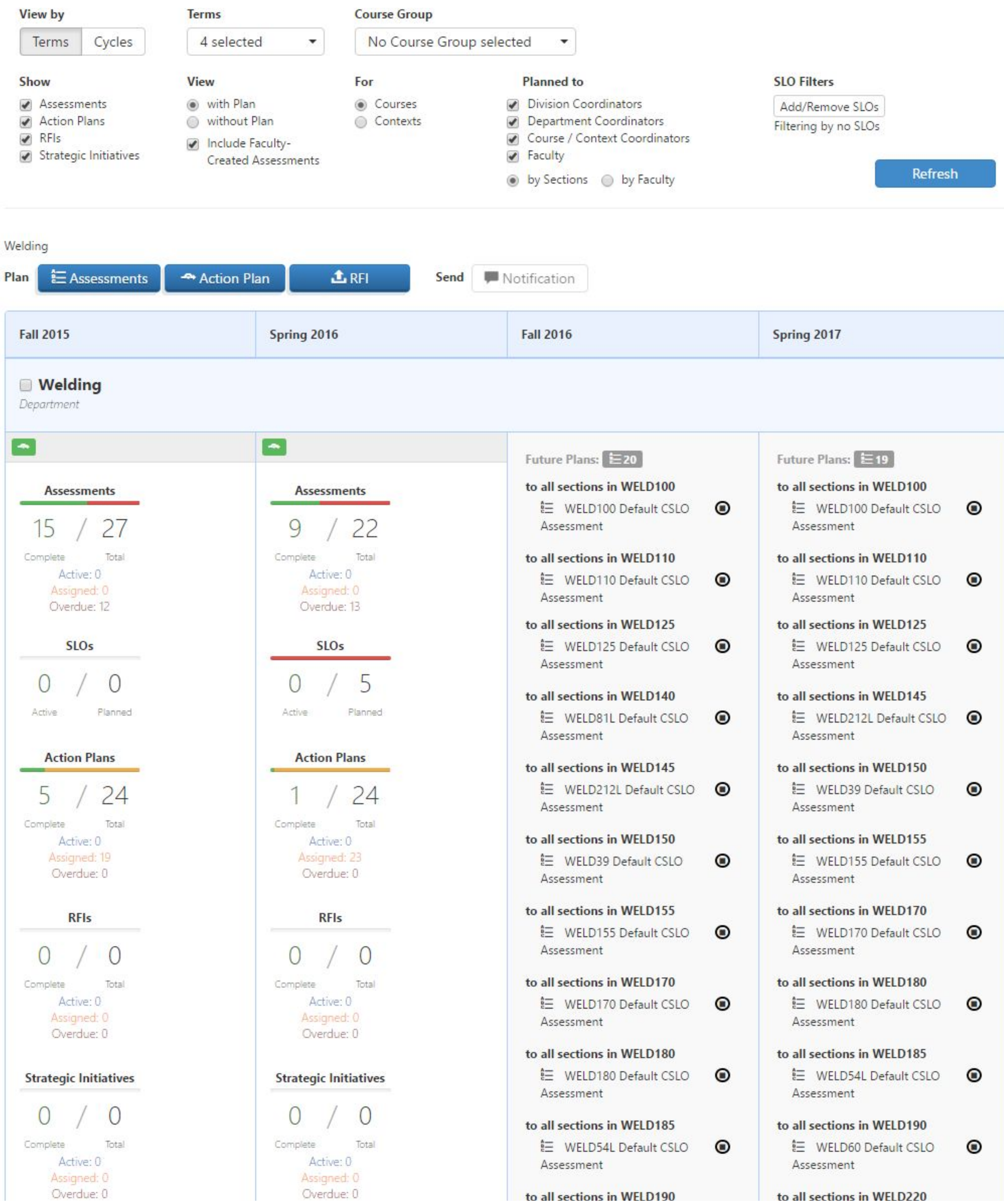
Faculty access Action Plans and RFI from their eLumen Inbox.


Selecting the Inbox icon and the Action Plans or RFI tab then choosing the appropriate item from the list will pop up the response screen.

# Ensuring Completion of Plans

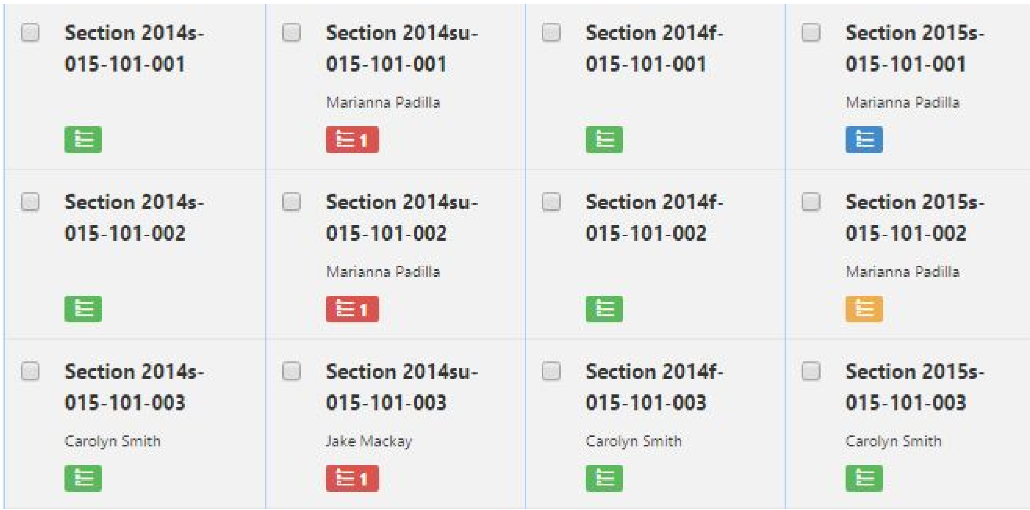
To manage the progress of Faculty and Coordinators in completing your planned activities, the Planner home screen displays the progress on the planned Assessments, Action Plans, and RFIs for the current Org Entity selection. It is accessible in the Strategic Planning section under the Planner tab.

The Planner display can be customized by setting the filters above the table and selecting Refresh.




## Locating Overdue

The progress of a planned assessments can be viewed on the Planner home screen. The icon color indicates the level of progress; Green for completed items; Blue for active items that are awaiting completion; Gold for in progress, and Red for overdue items.




***Note:*** *Planned SLOs appear completed when an assessment is added to the section. These assessments will then be counted under the Assessment icon. For schools planning SLOs, you will want to ensure that both the SLOs and assessments are all complete.*

### Notifying Faculty

Notifications can be sent to Faculty using the Planner home screen by selecting the box for desired sections from a term and then select the **Notification** button. Fill in the *Subject* and *Message* and select **Send Email.**

## Reports

eLumen contains several exportable reports that provide helpful information and useful tools for use outside of the eLumen software. To run a report go to the **Reports** section and the **Available Reports** tab unless otherwise listed. To find previously generated reports, select the **Documents Library** tab.

***Note:*** *The list of reports can be rearranged by dragging and dropping reports.*

### SLO Lists

**ISLO/PSLO Summary Map by Course/Context** - Provides the number of CSLOs mapped to either ISLOs or PSLOs for each course/context.

**SLO Presentation** - Provides a simple list of ISLOs, PSLOs, and CSLOs.

### Assessment Participation

**Course Statistics and Evidence** - Provides mastery levels for each course on each SLO.

**Institutional Statistics** - Provides number of courses, contexts, credentials, and GE courses with assessments and action plans for the whole institute.

## SLO Outcomes

**Course Statistics and Evidence** - Provides number of courses with SLOs, assessments, and action plans for a program.

**SLO Performance Report** - Provides student counts for mastery levels of PSLOs or ISLOs broken down by term and organizational and student descriptors.

**SLO Performance - By Division, Course, CSLO** - Provides student counts for mastery levels of CSLOs broken down by term.

**Results Explorer** - Provides student counts for mastery levels and scale scores for the SLOs and any criteria assessed by a single assessment both overall and by term for each course. This report is attached to each assessment found in the Strategic Planning section, under the Assessments tab.

## Continuous Improvement

**Budget Report for Action Plan** - Provides a list of effective and ineffective actions and the number of resource requests and the amount of resources requested for each Action in a single Action Plan

**Strategic Initiative Section Report** - Provides a nested view of the data in a Strategic Initiative. This report is attached to each Strategic Initiative found in the Strategic Planning section under the Strategic Planning tab.

## Faculty Only Reports

**SLO by Term** - Provides student counts for mastery levels and scale scores for the SLOs.

**Faculty SLO by Course** - Provides student counts or per student scores for mastery levels and scale scores for the SLOs.

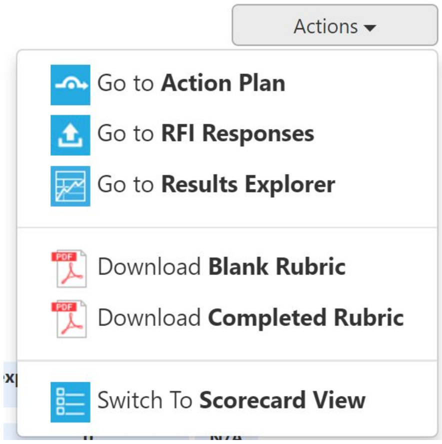
***The following can be downloaded from either the Rubric or Scorecard view of the Rubric or Scorecard using the Actions drop-down menu.***

**Blank Rubric** - Provides a blank rubric of an assessment without student names. This report is found in the Rubric View while scoring an assessment.

**Completed Rubric** - Provides a complete scoring of an assessment for a single student. This report is found in the Rubric View while scoring an assessment.

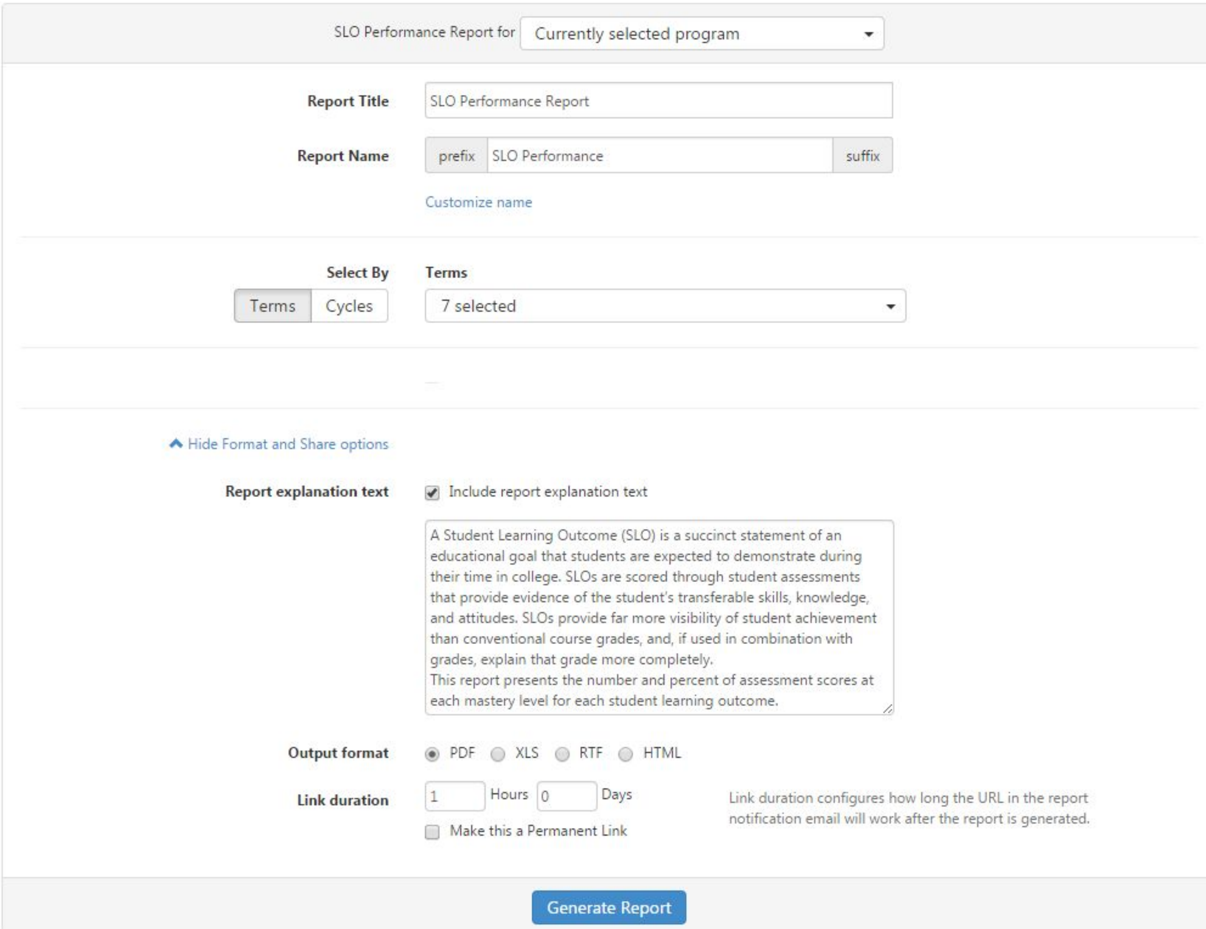
**Blank Scorecard** - Provides a blank scorecard of an assessment with the section roster and space to fill in student scores. This report is found in the Scorecard View while scoring an assessment.

**Completed Scorecard** - Provides a scorecard with all available scoring of an assessment for the section's roster.  This report is found in the Scorecard View while scoring an assessment.




## Running a Report

Each report has specific options that are unique to that report, but there are some general features shared by most or all reports.




**Run All** - Program level reports offer the option to Data Stewards to select multiple programs or departments and run an identical report for all units.

**Report Title** - All reports allow the user to change the title as it appears within the document.

**Report File Name** - The prefix and suffix system allows the user to configure and customize the filename of the report. This provides a standard form for uploading documents to a website or importing into another document handling program.

**Terms or Cycles** - Term sensitive reports allow the user to select either a set of terms or a Cycle as defined in the Strategic Initiative system.

**Report Explanation Text** - Some reports provide space near the beginning for custom explanatory text.

**Output format** - All reports within eLumen are available in either PDF or RTF (Word Document) format. Additionally, reports within the Reports section are available in XLS or HTML format.

**Link Duration** - Reports within the Reports section provide the ability to generate a link to download the report directly from the eLumen system. To protect sensitive data, the user can determine how long a link should be active or create a permanent link.

## Knowledge Base

eLumen provides an ever-expanding knowledge base that includes articles, forums to provide feedback on features and support, and a Contact Support link. This can be accessed through the "?" icon in the upper right corner of eLumen.


# Optional Sections

These sections are optional areas that can be covered in a training at the desire of the Data Stewards.

## Program/Department Profile

eLumen offers the ability to build Profile pages for a Program or Department to track program Goals. To access the profile, select the Program in the *Organization.*

### Profile

To view and edit the profile, select the Department or Program in the *Org Entity* menu in the top right of the screen. Go to the **Org Management** section and under the **Profile** tab.

#### *Dashboard*

The Profile dashboard display the name and type of the Program, the number of faculty teaching courses with the program, and the number of courses and contexts owned by the program. In addition, the dashboard displays the Program's Goals alongside any mappings to Institutional goals and lists the Certificates and Degrees offered by the program.

#### *Mission Statement*

From this screen, the Department or Program Coordinator can input and edit the Mission Statement by selecting **Edit Mission.**

### Goals and Objectives

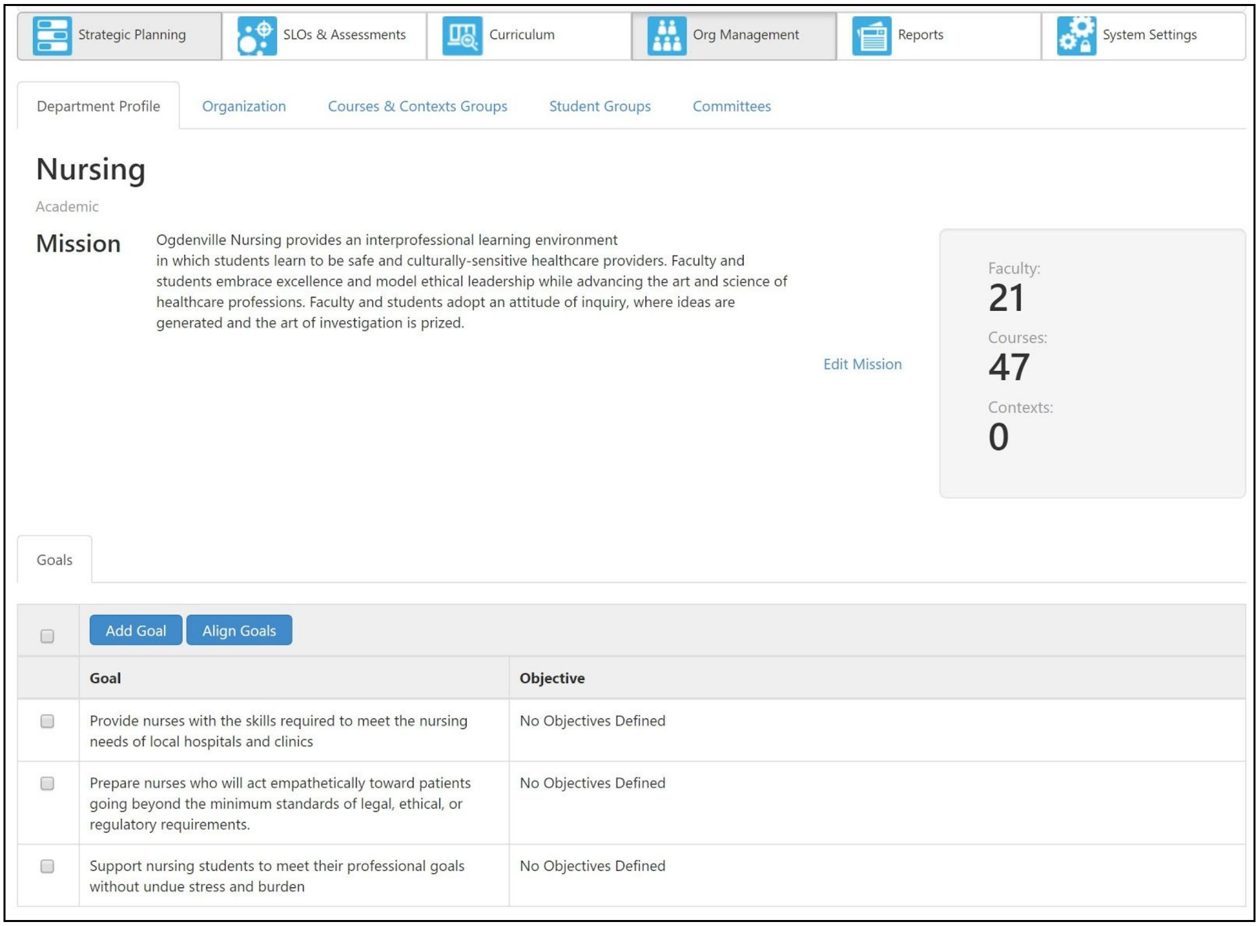
Institution, Department, and Program Goals and Objectives can be pulled into Strategic Initiatives to be aligned with SLOs, improvement Actions, and Resource Requests.

#### *Adding Goals and Objectives*

Institutions, Departments, and Programs can own Goals. These goals can be imported into a

Strategic Initiative to track progress toward meeting a goal.

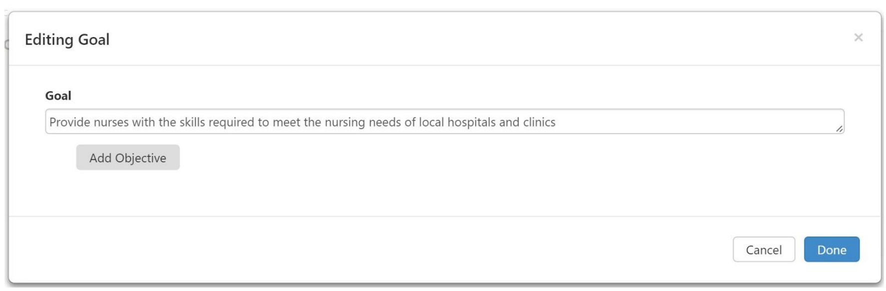
To add a Goal, select the Institution, Department, or Program in the *Org Entity* menu at the top of the screen. Go to the **Org Management** section, then **Department Profile** and the **Goals** sub-tab.




Select **Add Goal**, and fill in the text box. If it is appropriate to add an Objective, select **Add Objective** and fill in the text box. Add as many objectives as needed. Over the objectives up or down the list to place in order. To remove an objective, select the red box. When complete, select **Done**.


## Editing a Goal or Objective

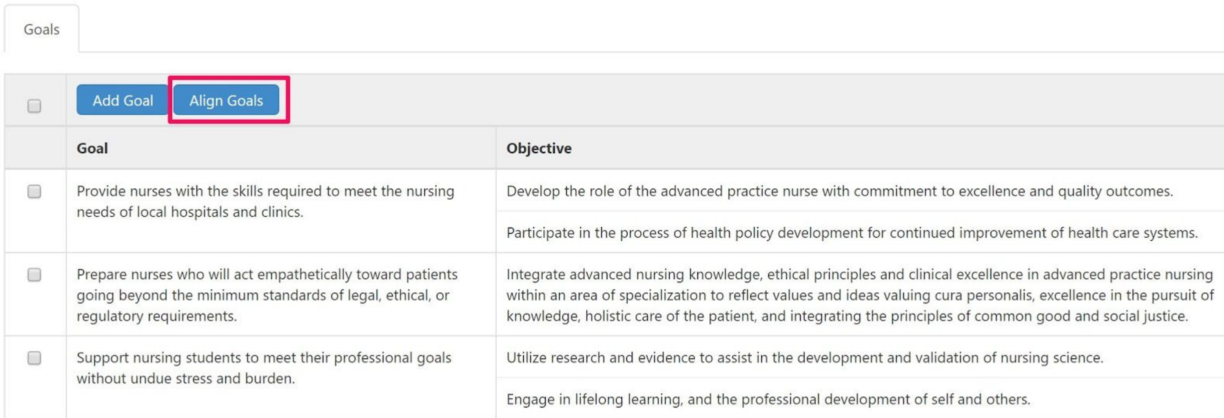
Goals and Objectives can be edited. Select the Goal and choose either **Remove Goa**l or **Edit Goal**. To add an Objective to an existing Goal, select **Edit Goal**. Modify the text as needed and/or add an Objective by selecting **Add Objective**. Select **Done** when finished.



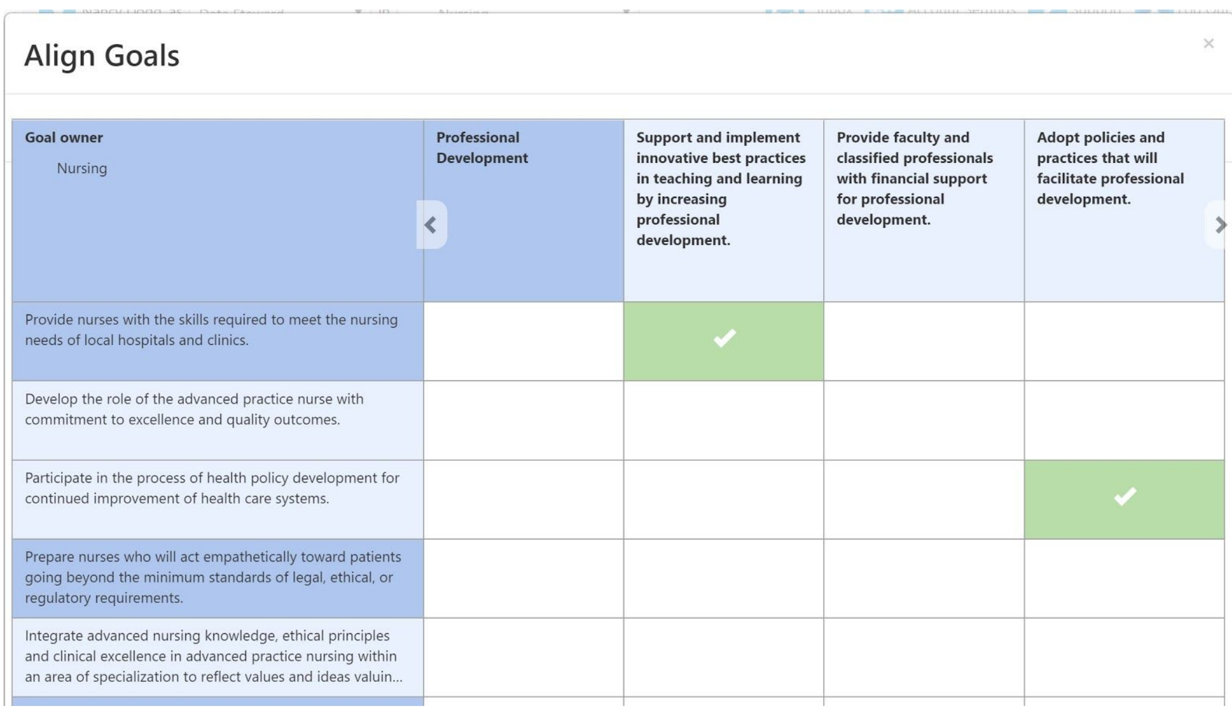

## Mapping a Program/Departmental Goal to an Institutional Goal

Institutions, Departments, and Programs can own Goals and Objectives, and Department and Program Goals and Objectives can map to an Institutional Goal.

To map Goals and Objectives, select the Institution, Department, or Program in the *Org Entity* menu at the top of the screen. Go to the **Org Management** section, the Department Profile. Choose **Align Goals** from the **Goals** tab.

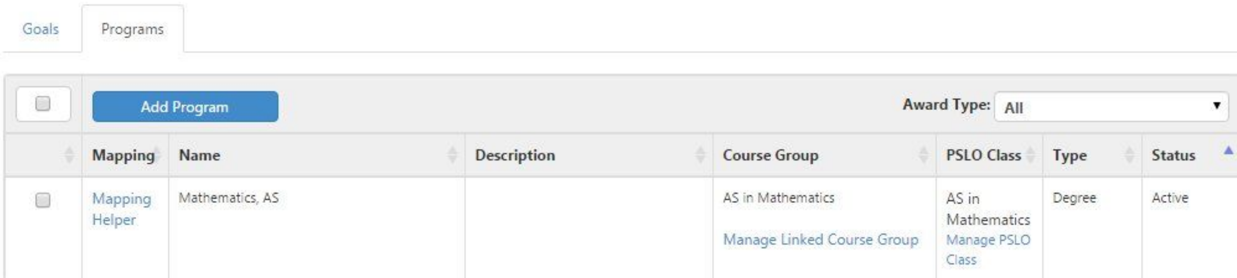



In the grid, **Select** the cell to create a mapping between a Goal or an Objective. Select the cell again to remove the mapping. Goals appear in a darker blue cell, while Objectives display in a light blue cell. Use the arrows on the right or left side of the horizontal scale to see more Goals and Objectives.




## Credentials

To add a certificate or degree, select **Add Credential** and type in the name and description of the certificate or degree.




To link the courses that students take for the credential, select **Manage Linked Course Group.** To link the PSLOs that students will master as part of the credential, select **Manage PSLO Class.**

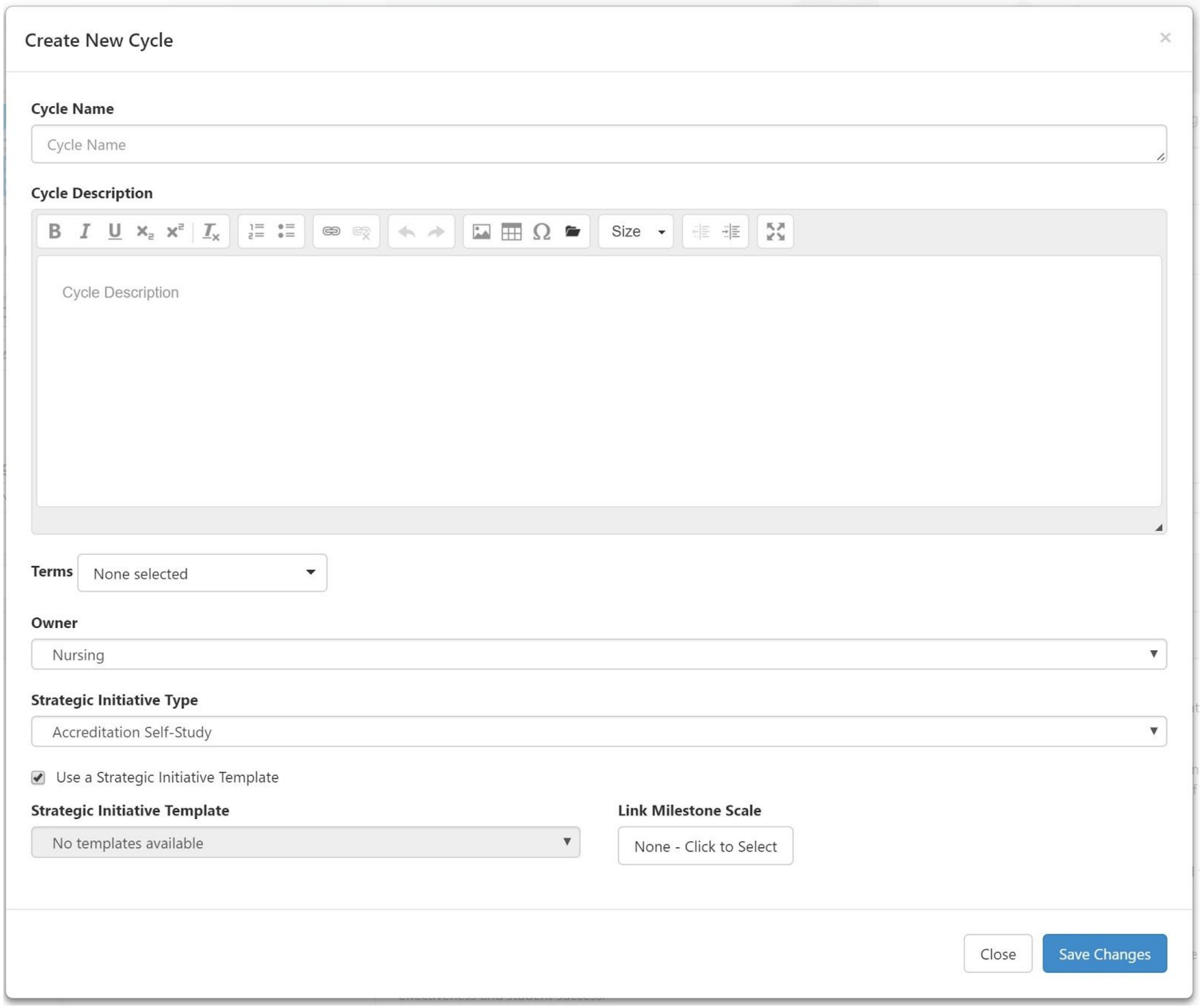
# Strategic Initiative Cycle

## Creating a Cycle

As stated previously, *Strategic Initiatives* are an umbrella for organizing *Assessments, Action Plans*, and *Requests for Information* to guide the *Continuous Quality Improvement* process. *Strategic Initiatives* are defined temporally by *Cycles* that define the academic *terms* for the *Strategic Initiative*.

To create an *Cycle,* go to the **Strategic Planning** section, and then to the **Initiatives** tab. Choose the Initiative type from the drop-down menu.

This screen will list all of the *Cycles* for the selected program or department. To create a new *Strategic Initiative Cycle*, select **Add Cycle** and the Create New Cycle screen will appear.




**Cycle Name** and **Cycle Description** – The title and description should remind users of the goal or driving force behind the *Strategic Initiative Cycle* and should include relevant details such as the purpose and the scope of the initiative. The description might also include information about personnel involved in the initiative.

**Terms** – Choose the terms which compose the cycle.

**Owner** – Define an *Org Entity* that will own and manage this *strategic initiative.*

**Strategic Initiative Type** – Select an SI type from those defined by the Data Steward. The SI Type will limit the selection of *SI Templates.* Choose the appropriate template from the list.

**Use a Strategic Initiative Template** - Checking this box displays a list of institutional Strategic Initiative Templates. Each template contains a set of sections designed and arranged by the Data Stewards.

**Link Milestone Scale** - Select a Milestone Scale from the list or create a new cone. Milestone

Scales are not required.

To create the cycle, select **Save Changes**, eLumen will display the cycle in the Parent Cycle timeline.

*Strategic Initiative Parent Cycle Timeline*

Alternatively, an Institution can allow programs to create Strategic Initiatives using a parent cycle owned by the Institution or Department.

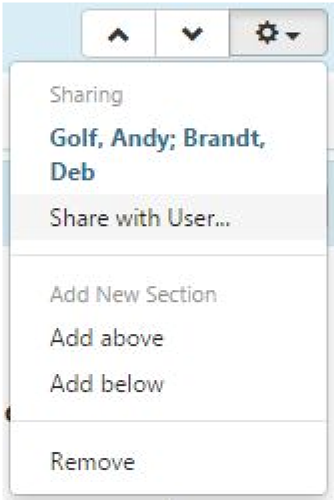

The user only needs to select an Initiative Type from the drop-down menu then select the Institutional or Departmental initiative and select **Clone Cycle**. The Create New Cycle screen will have all fields but the Cycle Name prefilled by the parent cycle.

## Adding Collaborators to an SI Section

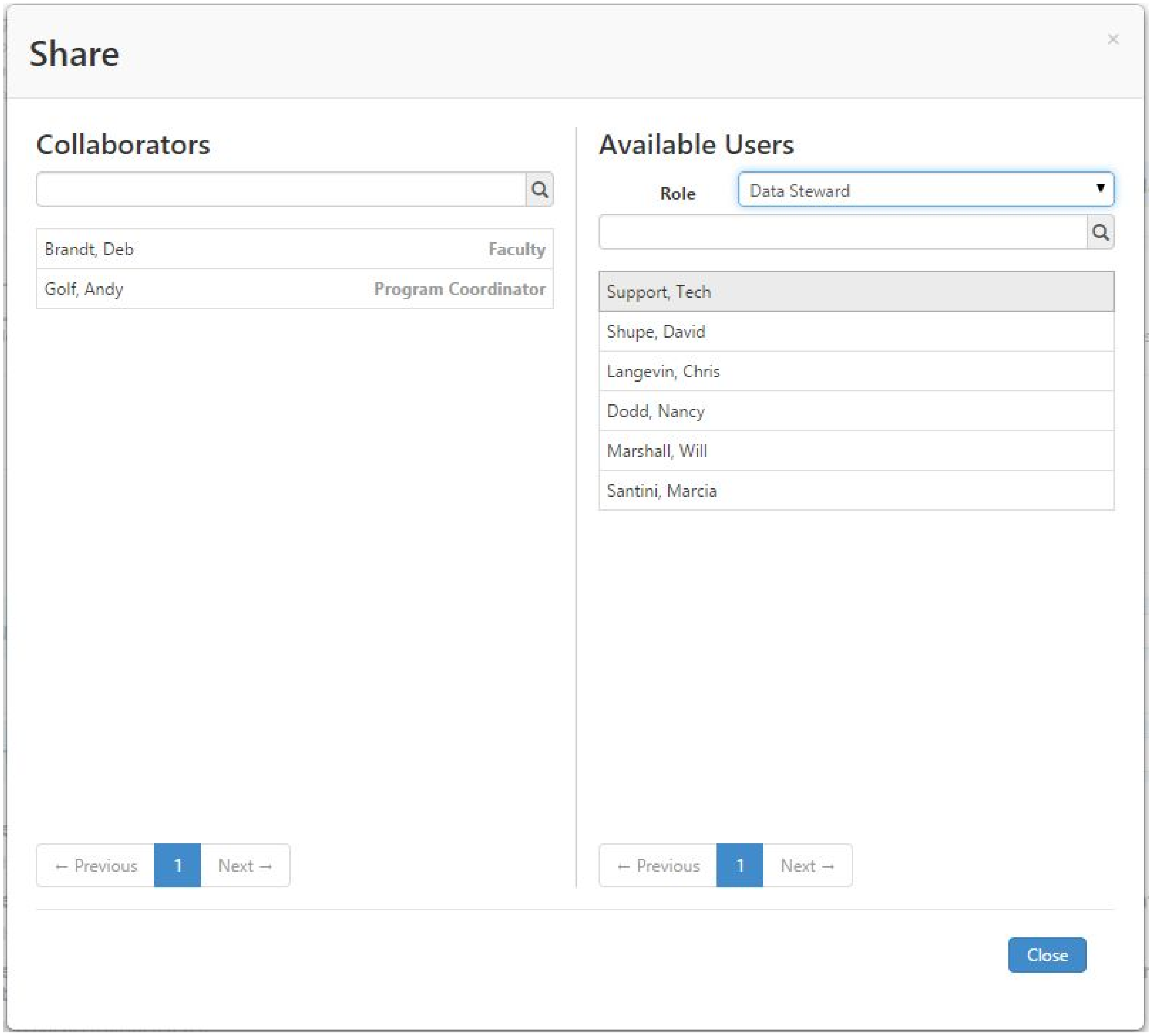
When a Strategic Initiative is created using a template or once a section is added to a Strategic Initiative, the next step is to add Collaborators to a section who will work to collectively edit the section.

To add a collaborator, open the initiative and go **To Design Mode**.


Select the gear icon next to the section and choose **Share with User…**




In the pop-up, choose a user role in the right column and then choose a user from the list of users with that role. Use the box to search for a name with that user role. To add a user as a collaborator, select their name in the right column. To remove a user as a collaborator, select their name in the left column.




Once all changes are made, select **Close.**

## Collaborating to Write an SI Section

The Strategic Initiative system features sections that can be created and customized for specific needs. Collaborators in these sections can save their work as drafts and decide which draft to publish.

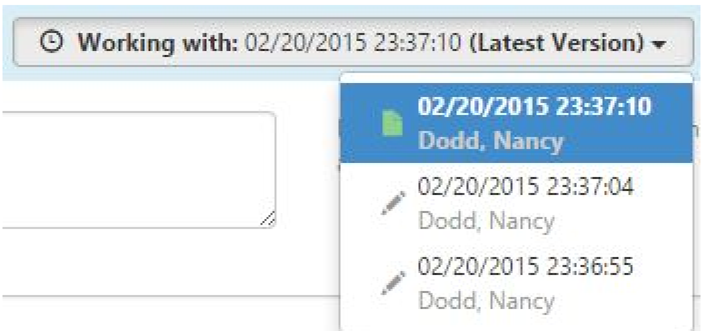
To edit the text in a Strategic Initiative, Department and Program Coordinators and Data Stewards need to go **To Active Mode.** Other users are always in Active Mode.


All users working on a Strategic Initiative can view the current published version of any section.

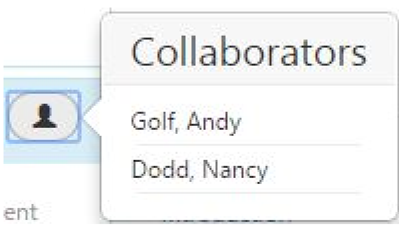
Collaborators on a section will see the current draft version and can edit the text.

Periodically and when finished writing, collaborators can **Save draft** to save a copy of their work for other collaborators. When a draft is ready to be shared with all users on the Strategic Initiative and printed in a Strategic Initiative Report, collaborators can **Publish** the section.


To review and recover text from previous drafts, use the drop-down menu in the of the section.



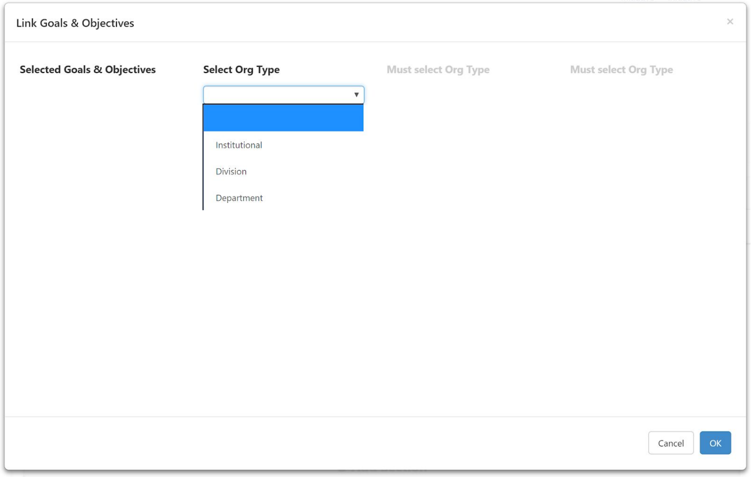

To view the collaborators on a given section, select the **person icon** in the top right of a section.



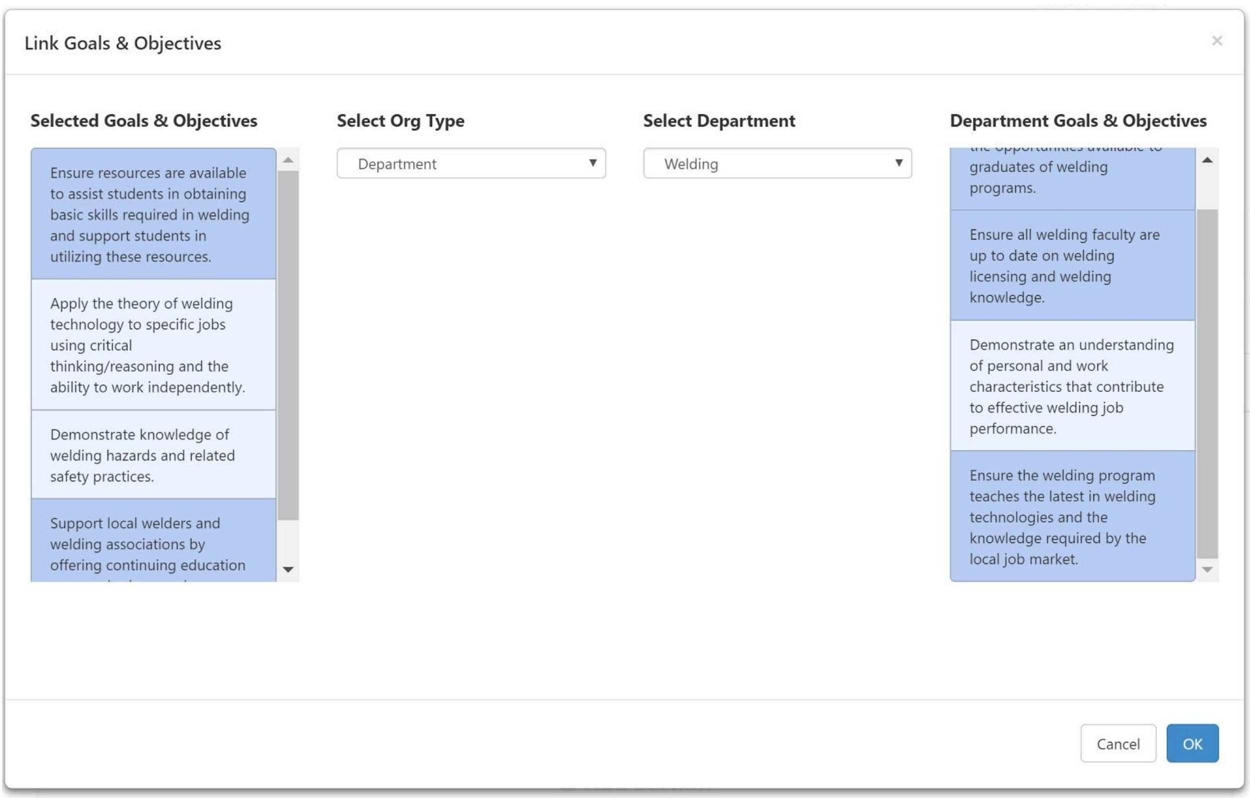

## Adding & Evaluating Goals in a Section

The Coordinator can add Goals and Objectives to a section in *Design Mode* by selecting the Goal icon on any SI section.


Select **Add Goal and Objectives** to link Institution, Department, or Program Goals and Objectives. Select Org Type for the appropriate goal and objective set.

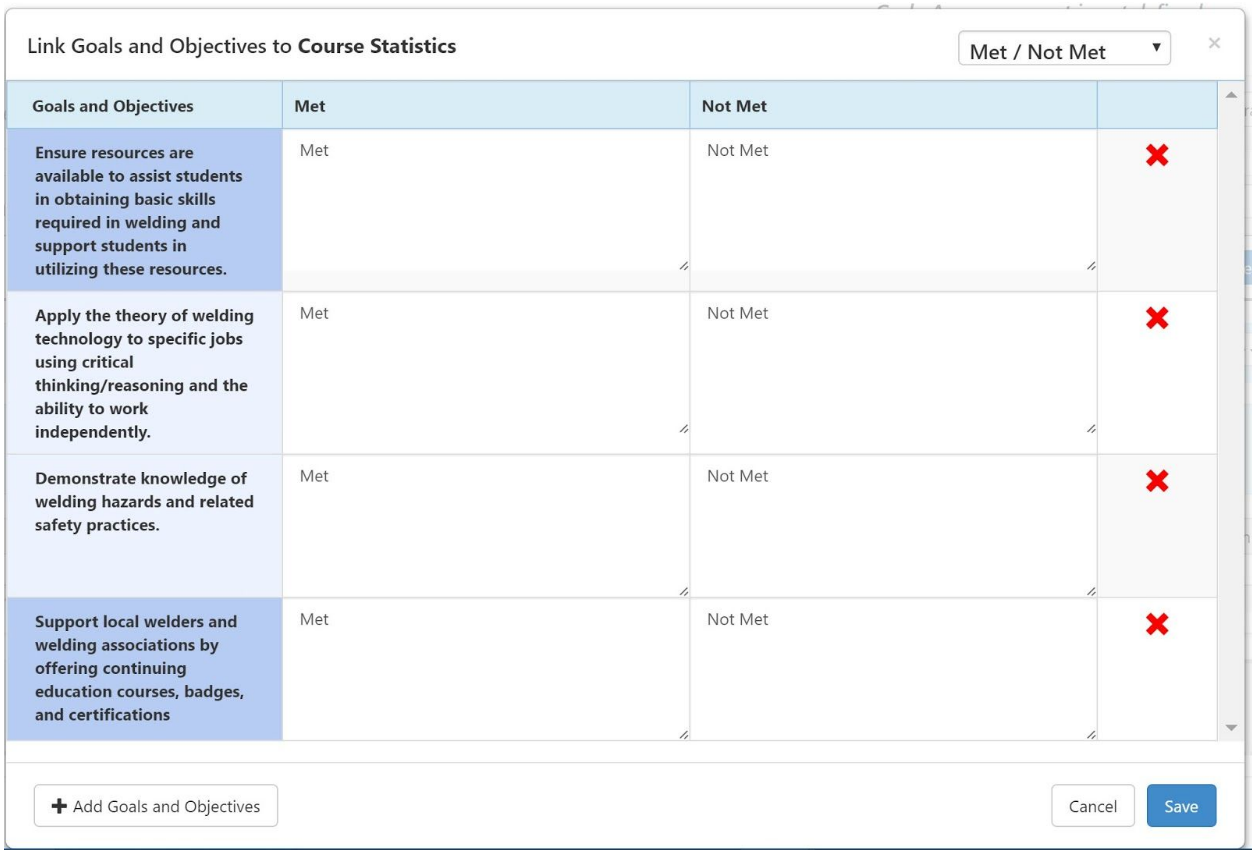



The appropriate Goals and Objectives will appear in the list. Select the desired items from the list on the right and they will appear in the **Selected Goals & Objectives** column on the left. When finished, select **OK**.




Use the drop-down menu in the top right to change the Benchmark Levels for evaluating the goal.

Any collaborator can evaluate the goal by selecting the Goal icon from *Active Mode.* The collaborator can select a Benchmark Level similar to scoring an assessment.




Select **Save** when finished.