OFFICE OF INSTITUTIONAL EFFECTIVENESS

A&M-COMMERCE

NUVENTIVE IMPROVEMENT PLATFORM USER GUIDE

Updated Summer 2024

IE@tamuc.edu

https://www.tamuc.edu/institutional-effectiveness/

Texas A&M University-Commerce Nuventive™ Improvement Platform
User Manual

Every year, each A&M-Commerce academic program and divisional support unit engages in institution-wide, ongoing efforts of continuous improvement by identifying expected student learning outcomes and goals, assessing the extent to which these outcomes and goals are achieved, and providing evidence of seeking improvement based on analysis of these results. To support this effort, the Nuventive™ Improvement Platform (Nuventive) serves as an online assessment platform in which to collect, organize, and manage the assessment process at Texas A&M University-Commerce. This platform creates a digital repository of assessment data that offers an easily accessible, web-based reporting tool, automatically saves all entered information, and maintains a historical record of assessment data. The Nuventive system offers a Two Column Reporting format which can produce a succinct and comprehensive document of the annual Institutional Effectiveness reporting.

This manual provides A&M-Commerce IE Authors, IE Representatives, and those serving as reviewers of assessment reporting with the basic "how-tos" of navigating and inputting information and data into

Figure 1: Example of IE Assessment: Two Column Report

Nuventive to document annual assessments. The information within the manual is organized in order of access within the Platform, starting with Logging In and ending with the Document Library. Each section contains the steps for creating new information, editing existing information, and other functions as applicable.

Assessment Plans and Results entered in the platform are reviewed by the college or division and the Department of Institutional Effectiveness, and then available to University Leadership for decision-making and to support continuous improvement across the campus. This data is used in internal and external communications and publications as well as reports for the A&M University System, Texas Higher Education Coordinating Board, SACSCOC, accrediting agencies, and more.

If you have any questions about utilizing the assessment platform, conducting assessments, or how the collected information is used, please email IE@tamuc.edu.

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Logging into the Nuventive™ Improvement Platform

Nuventive Improvement Platform access will be granted after successful completion of the *Utilizing the Improvement Platform for Annual Assessment Reporting* training course in TrainTraq. You may receive an email notification to complete the required training or may search for the training in TrainTraq by course number 2114162.

Accessing Nuventive is simple and straightforward! It is supported on Apple Mac iOS as well as Microsoft Windows.

Nuventive Improvement Platform is most compatible with Google Chrome, Safari or Firefox web browsers; our recommendation is Chrome and to avoid the use of Internet Explorer for accessing and using this software.

i. The first step will be actually getting into the Nuventive Improvement Platform! This can be done from the Office of Institutional Effectiveness webpage or from myLEO.

   a. Access from the **Office of Institutional Effectiveness Webpage**

      ♦ Click this Institutional Effectiveness hyperlink

      ♦ Navigate to *Nuventive ™ Improvement Platform* and click on the Login button

   b. Access from **myLEO**

      ♦ Sign in to your myLEO account

      ♦ Click on the APPS tab, at the top of the screen

      ♦ If the Nuventive icon has been added to your dashboard, it will most likely appear at the bottom of your applications the first time you access it. To move the app towards the top of your dashboard, click on the three lines in the top right of the app icon, and then **Move this Portlet**.

      ♦ Use the navigation tool that appears in the top right to move the app icon to the top of your dashboard for easy access.

      ♦ Once you have the icon where you want it, simply click on the app to access the Nuventive Improvement Platform.

ii. Log in using your Single Sign-On information or your active directory credentials (the same information you use to access WorkDay or your work computer). Select Sign-In.
   If you need assistance with this information, please contact CITE at Helpdesk@tamuc.edu or at 903-468-6000.

If you need to add a **new user**, please send an email to IE@tamuc.edu. Include the following information in your email:

- New user's full name and title
- A&M-Commerce email address (@tamuc.edu)
- The academic program or support unit to which the individual needs to be granted access
- The role in the assessment process this individual is fulfilling:
  - IE Author
  - IE Representative
  - Department Head or Direct Supervisor
  - Dean or Vice President
- Reason for the request

If you have trouble accessing your existing Nuventive Improve account or are locked out, please email IE@tamuc.edu.

Navigating to the academic program or unit
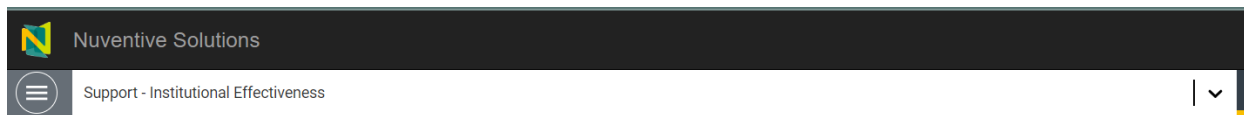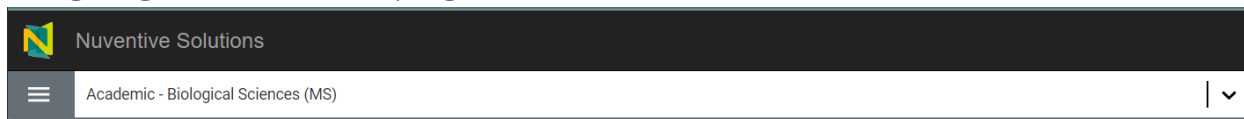
Navigating to your degree program or division to begin updating or inputting your assessment data is easy!

The Plans to which you have access will appear in the drop-down list located at the top of the screen. If you are assigned to multiple Plans, click the down arrow to navigate between multiple Plans. Alternatively, you can begin typing the name of your program or division in the drop down menu and it will appear underneath. To access the appropriate home screen, just click once on the name.

All academic degree programs will start with "Academic- " and all support divisions will start with "Support- ".

Basic Navigation

Main Menu (Hamburger Menu) Navigation

The Main Menu or Hamburger Menu allows you to navigate to the necessary areas of the Nuventive platform. Click on each option to expand the menu and reveal additional options.

The Home Page opens to an analytics chart that summarizes the progress and submission status of Assessment Methods and assessment Results for the program or unit. This snapshot can be helpful in identifying Assessment Methods without Results, and Results that either have a Standard of Success that was not met or whose Results were Inconclusive, which require an Action but *do* not have an action recorded.

Program/Unit Information holds general information about the program or unit including the College or Division name and Mission Statement, as well as assigned personnel.

Plan and Results

The Plan and Results menu option is where the assessment plan and results data will be entered. These areas will be explained more fully later in the manual.

Mapping

Mapping will navigate to the Mapping page where the program or unit will map their SLOs or Goals with other institutional learning outcomes and strategic priorities. Marketable Skills mapping is available for academic programs and certain support units.

Reports

Reports will navigate you to the IE Assessment: Two Column Report which can be run to summarize information about annual assessment data.

Document Library

The Document Library serves as a document repository for your program or unit. Multiple files types such as Word Doc. files, excel files, PDF, JPEG, etc. can be loaded and stored here.

📁 Historical Documents

📁 IE Resources

📁 Supporting Documents
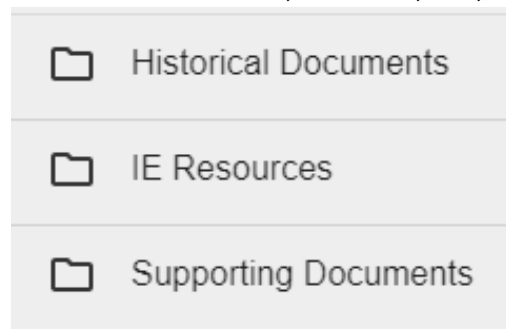
Screen Viewing Options

The above split screen options are especially helpful when navigating resources and entering information at the same time. Institutional Effectiveness has preloaded some helpful resources into the Nuventive system for your use, and the above screen viewing options allow you to 1) view your Nuventive program or division editing area as full screen, 2) primarily view your editing area and the resources as a smaller viewing pane to the right, 3) view your editing area and the resources pane as

evenly split across your screen, or 4) primarily view your resources pane and the editing area as a smaller background screen on the left.

## Home Page and Program or Unit Information

Logging in takes you to the Home Page for your program or unit. The analytics table can be helpful in identifying Assessment Methods and Results that require actions or updates.

Red flags signal missing information or a Result entry that needs further attention. Flags will appear if there is an assessment method missing, if there is an assessment method that is missing a result entry, or if a result Conclusion has *either* "Standard of Success not Met" or "Inconclusive" selected but does not have a saved Actions/Use of Results entry.

The General Information page provides information on the program or unit such as the College/Division, Degree type if applicable, and Mission Statement. This information will be prepopulated in the Nuventive Improvement Platform, but if changes occur, the information will need to be updated by the IE Author or another designee.

Plan and Results: Assessment Plan

Navigation
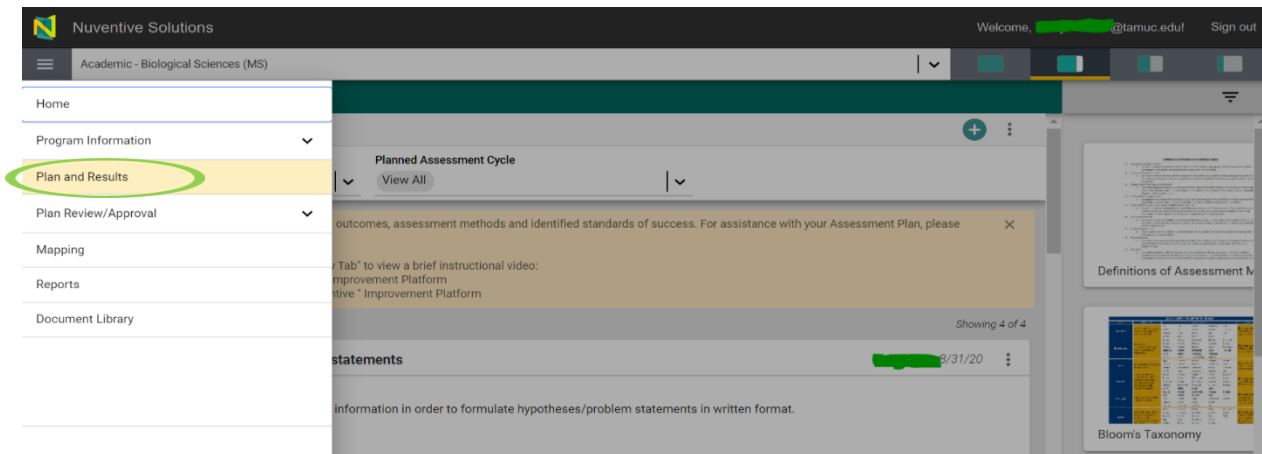
Clicking on the **Plan and Results** menu option displays the Academic Program Assessment or the Administrative/Support Plan.
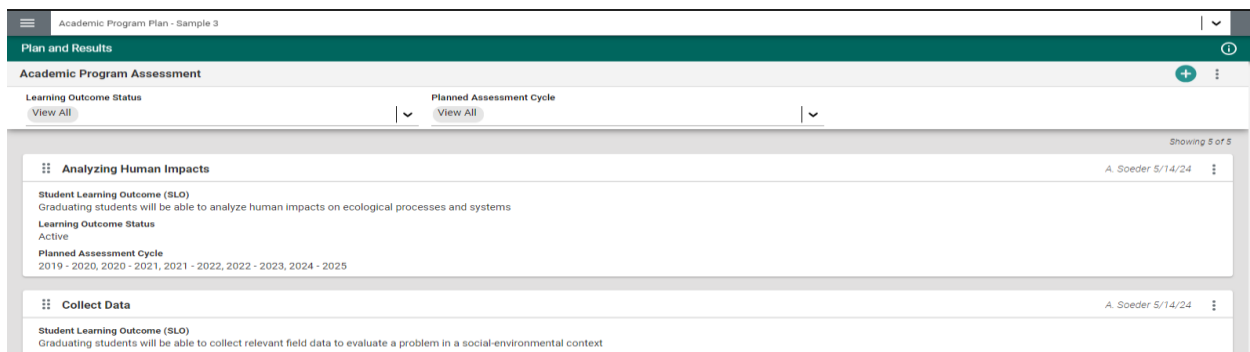
For an **Academic Program Assessment**, the Plan and Results screen will display each Student Learning Outcome (SLO) name, SLO description, Learning Outcome Status, and Planned Assessment Cycle.
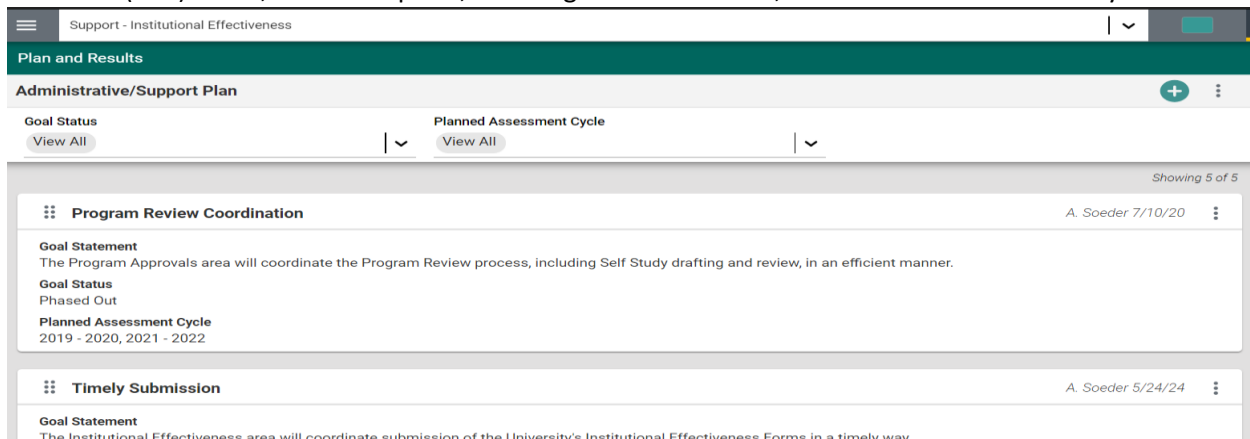
For an **Administrative/Support Plan**, the Plan and Results screen will display the Goal Name, Goal Statement, Goal Status, and Planned Assessment Cycle.

For an **Academic Program Assessment**, the SLO, Assessment Method, and Results are accessible by double-clicking each SLO name.

For an **Administrative/Support Plan**, the Goal Statement, Assessment Method, and Results are accessible by double-clicking each Goal name.

On this Plan and Results screen, you can edit the SLOs/Goals as well as the Assessment Methods and add/edit Results.

In the resource viewing pane on the right hand side of the screen are several resources. For **Academic Programs**, the Definitions of Assessment Method Types, Bloom's Taxonomy, and the Academic Program Rubric for assessment reviews are available for reference. For **Administrative/Support Units**, the Definitions of Assessment Method Types, Taxonomy of Goals, and Support Unit Rubric for assessment reviews are available for reference. These resources will be helpful in revising or adding SLOs/Goals and Assessment Methods.

Note that Assessment Plans for academic programs will include space for Student Learning Outcomes while Assessment Plans for administrative/support units will include space for Goals. In some cases, support units identified as Academic and Student Support may also assess learning outcomes. Please note that these learning outcomes will be entered as Goals for the unit in their Assessment Plan.

With the Nuventive Improvement Platform, there is no need to add a continued SLO/Goal and the relevant Assessment Methods each year. Even if marked Phased Out, the SLO/Goal and Assessment Method will remain in the Assessment Plan. They can be filtered out to be hided from the screen or in reports.

Plan and Results Filters

Academic Programs can be filtered by **Learning Outcome Status** of *Active* or *Phased Out* and **Planned Assessment Cycle** since the initial 2019-2020 cycle in Nuventive.
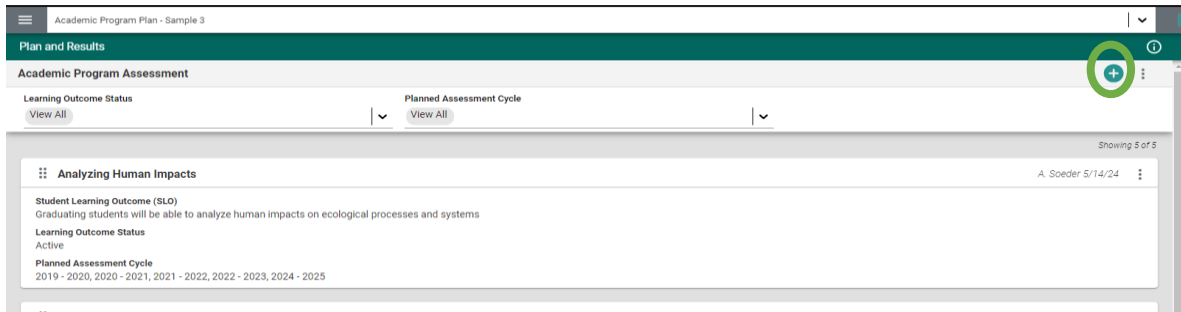

Administrative/Support Plans can be filtered by **Goal Status** of *Active* or *Phased Out* and **Planned Assessment Cycle** since the initial 2019-2020 cycle in Nuventive.

Adding a New SLO or Goal

To add a new SLO or Goal, click the green add button on the top right corner.

a. Add the Learning Outcome or Goal **Name**. This will be a shorter reference name that will be displayed in the Summary Table on the home page. This name should succinctly summarize the key theme of the SLO or Goal. It is recommended that numbers not be used to name the SLO or Goal.

b. Add the Student Learning Outcome (SLO) or Goal **Statement**. This will be the complete phrase or statement of the learning outcome or goal. Keep in mind that an SLO is defined as what students are able to demonstrate in terms of knowledge, skills, and attitudes upon completion of a program while a goal is defined as an observable and measurable outcome that assesses a particular process, service, or experience.

c. Add the Learning Outcome or Goal **Status**. For a new SLO or Goal, this will be Active.

d. Input the **Planned Assessment Cycle**. Please include the full year (ex. 2024-2025, or 24-25). Up to three assessment cycles can be included here at a time.

e. If needed, enter a **Phase Out Date**. Most often, the Phase Out date will not be populated until the assessment has actually been phased out from the active assessment plan.

f. **Save** your work when you are done adding the SLO or Goal. Save option located on top right corner.

g. Select **Close** to return to the Plan and Results home page.

Click on any information symbol to view additional field level instructions for that particular entry or data field.

Editing an Existing SLO or Goal

To edit an existing SLO/Goal, double-click on its name or click the ellipsis located on top right corner for each SLO/Goal, select Open and then select the SLO or Goal Statement card.

a. NOTE: If an existing SLO or Goal will NO LONGER BE ASSESSED MOVING FORWARD, you should select Phased Out as the status rather than overriding the existing SLO/Goal and create a new SLO/Goal.

Once changes are made to the SLO/Goal, no historical evidence is kept in Nuventive to document previous versions.

b. If minor adjustments are being introduced, edit SLOs/Goals by clicking and editing each field.

    i. Replace the existing text in the Learning Outcomes or Goal Name box (if it is not unique to the SLO or Goal) with a shorter descriptive phrase. It is recommended to NOT use numbers (SLO 1, Goal 4,etc.) for the name.

    ii. Ensure the correct Planned Assessment Cycles are added for the SLO/Goal. Up to 3 years can be added at a time. One or more SLOs or Goals should be marked for the upcoming Planned Assessment Cycle (Ex. 2024-2025).

    iii. While on the Assessment Plan screen for each SLO or Goal, take the time to review and edit any of the other information on this screen. Click on the information symbol to view instructions for each field if you have questions. Be sure to select Save located in top right corner once you are done.

Adding a New Assessment Method

To add a new Assessment Method to an existing SLO/Goal or a new SLO/Goal, go to the ASSESSMENT METHOD card.
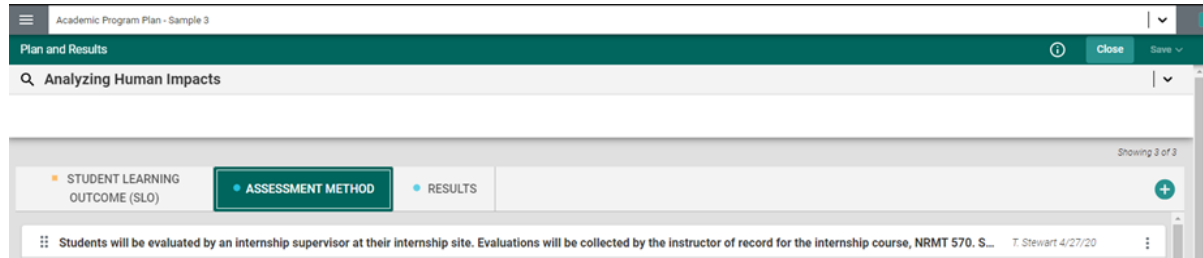
a. Click the green Addition button on the Assessment Method card.
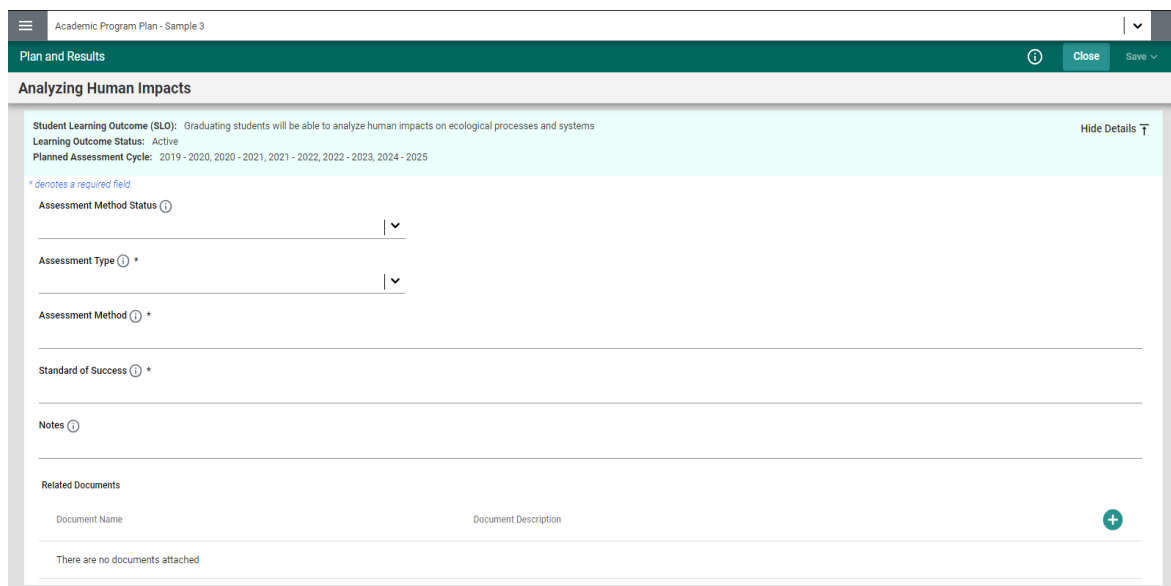
b. Select the Assessment Method **Status** from the Assessment Status drop- down list.

c. Select the Assessment Method **Type** from the Assessment Type drop-down list. The Assessment Method Type Definitions resource on the right hand resource viewing pane can be helpful.

d. Add the **Assessment Method**. Information entered here should include what is being assessed, who administers the assessment, who is being assessed, a description of the assessment measure, when the assessment is administered, and where it is assessed (for example, physically or during a

certain time cycle). Please be as detailed as possible in this section, keeping in mind that someone not familiar with the assessment could be reviewing this information during the IE Cycle. For more detailed guidance on what should be included in the Assessment Method information, refer to the Academic Program or Support Unit Rubric in the resources on the right of the screen.

e. Add the **Standard of Success**. The Standard of Success should set a numerical criterion for evaluating results, align with the assessment method, and relate to the type of assessment data collected. For example, 85% of graduating students will achieve a 4 or better on the final presentation rubric.

f. The **Notes** box can be used by the IE Author to add any internal notes for the author or for others related to the Assessment Method or the data collection. Use as you see fit.

g. If there are any **Related Documents** to attach, follow *Adding Supporting Information* (Steps 14-22).

h. **Save** your work when you are done adding the Assessment Method.

i. Select **Close** to return to the Plan and Results home page.

Note that at least one direct method of assessment is required for each SLO. Please avoid using student grades on graded assignments or tests. Grades often incorporate other factors (format, adherence to directions, etc.) or learning components that may not relate to performance on the SLO. Best practices for the assessment of both SLOs and Goals recommend using multiple methods or a combination of direct and indirect methods.

Editing an Existing Assessment Method
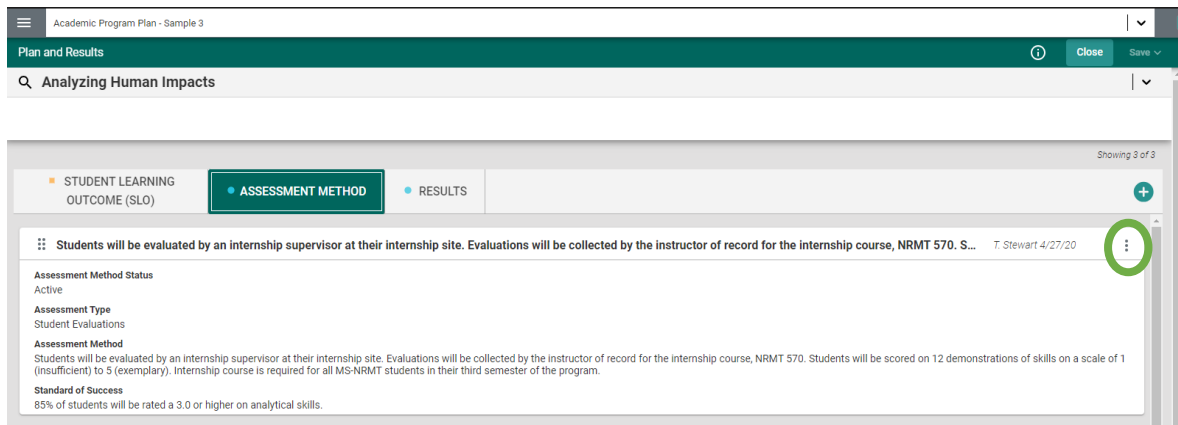
To edit an Assessment Method, click on the ellipsis and then select Open for each existing Assessment Method to review them and make the appropriate edits.

a. Once changes are made to the Assessment Method, no historical evidence is kept in Nuventive to document previous versions.


b. Use Notes to record previous information (Type, details of Assessment Method, Standard of Success, etc.).

c. If you are deactivating or no longer using an Assessment Method, change **Assessment Method Status** to *Inactive*. In this event, it may also be helpful to leave a note for future reference on why the assessment method was deactivated or what replaced it.

d. Be sure to Save (Save & Add New or Save & Close).

Plan and Results: Assessment Results

Navigation
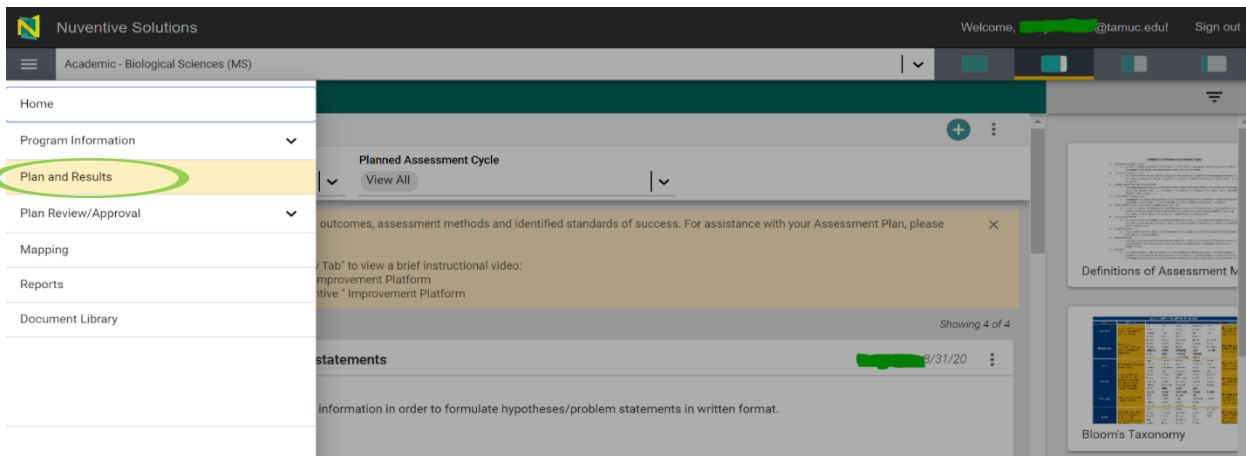
Clicking on the **Plan and Results** menu option displays the Academic Program Assessment or the Administrative/Support Plan.
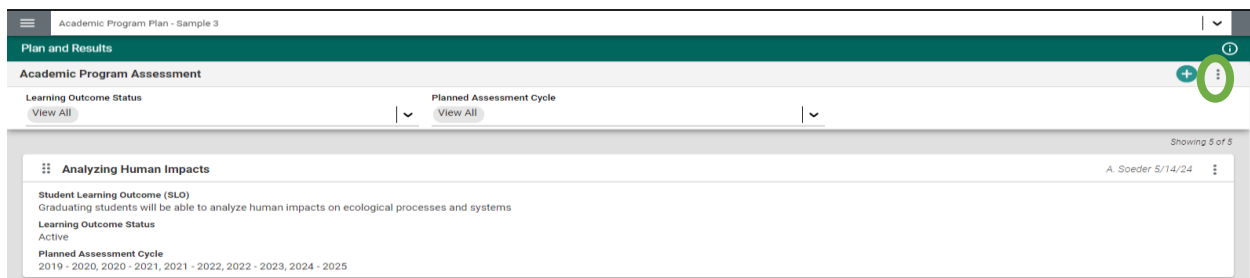
To view information, either double-click on the SLO/Goal or click on the ellipsis located on top right corner for each SLO/Goal, click Open and then select the Results card.

♦ **Results that have already been entered for previous cycles SHOULD NOT be changed or updated at this time**. Leave them as they are and consider them locked.

Adding a New Assessment Result
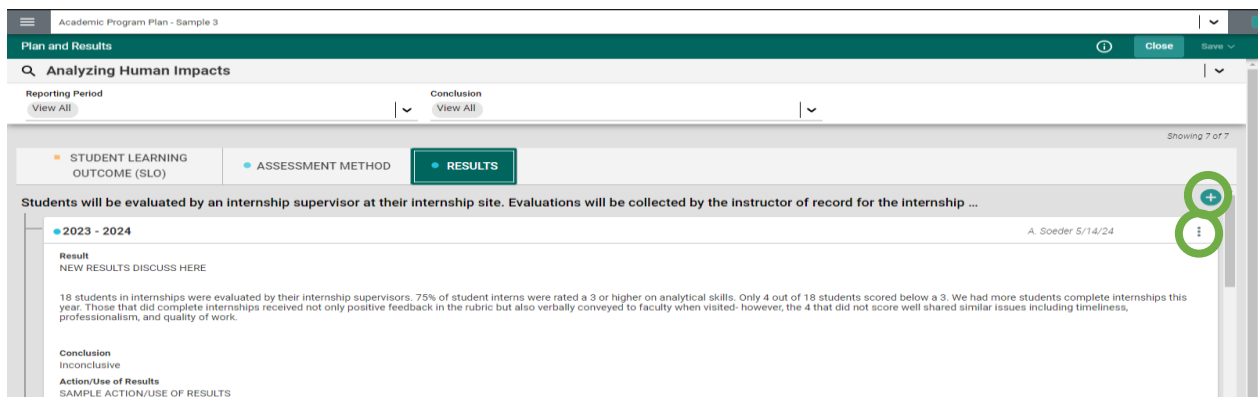
a. To add a new results entry for a SLO/Goal, click the green add button on top right corner for SLO/Goal.

◆ Note the Assessment Method and SLO/Goal information that will appear at the top to inform which Assessment data is being entered.

b. Click on the ellipsis located on top right corner for each SLO/Goal to view previous results entries and then click Open.

c. The **Result Date** will auto populate with the date you access the Results page, most commonly the date the results are being recorded in Nuventive.

d. Select the **Reporting Period** from the drop-down list. This will be the assessment cycle in which the results were collected. For data collected during a summer term, include the summer results with the academic year that follows (i.e. Summer II 2024 assessment data should be reported during the 2024-2025 Assessment Cycle).

e. Add the **Result** discussion information.

◆ Be sure to include the number assessed (n=x), numerical results data, and analysis and interpretation of the results. This may include a comparison of current results to previous results, descriptions of levels of performance, or a discussion of what factors may have contributed to performance on the measure. Ensure the description included here supports what was gathered through the Assessment Method.

f. Select the results **Conclusion** from the drop-down list. Only select Inconclusive if the results were unable to be collected. Otherwise, select either Met or Not Met.

g. Add information in the **Follow Up on Previous Year Action Plan**.

◆ This is a required field; if you implemented an action plan or modification from the previous year, describe what impact that had on the collected assessment results. If you did not implement an action plan in the previous year, enter "N/A."

Adding the Action/Use of Results

Add the **Action/Use of Result**s information for each Assessment Result. Describe how the results will be used, including actions being taken to seek improvement.

◆ This is required if your Conclusion was Not Met.
◆ This should include an action or modification that impacts curriculum/pedagogy or

operations/services, not simply a change to the method of assessment.

♦ In cases where the standard of success was met, you may also enter an action which describes how the results will be used to seek further improvements.

h. If adding **Supporting Information and/or Related Documents**, see next section.

i. When you are done adding the Results data, click the Save drop down and select Save & Close located on the top right corner.

In the resource viewing pane on the right hand side of the screen is the Assessment Review Rubric that will be used to evaluate completed assessment reports. Please use the items in this rubric to guide your entry of **Assessment Results.**

Adding Supporting Information and/or Related Documents
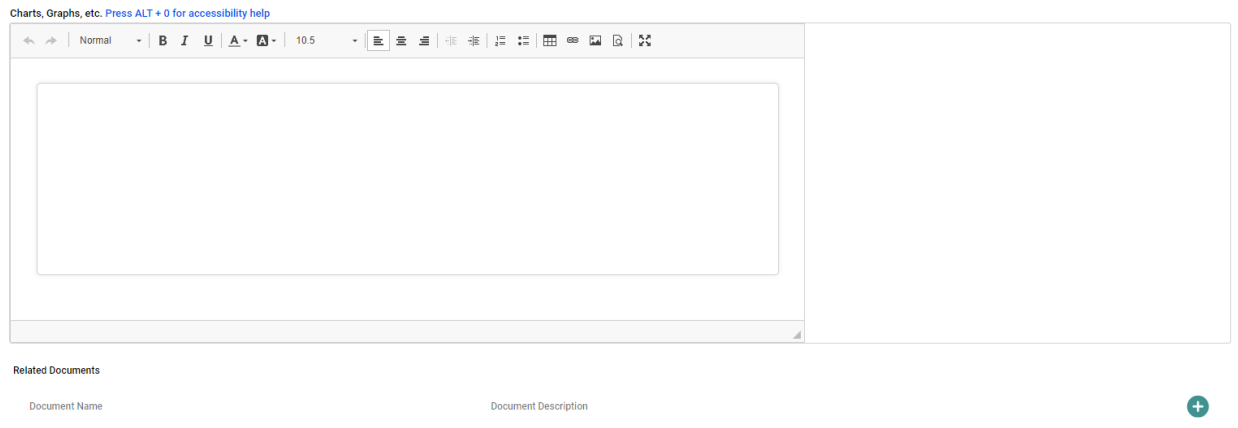
To add Supporting Information in the form of Charts, Graphs, etc., click in the box supplied and select from the options provided on the menu bar.

a. To add **saved** Related Documents to support the assessment results, select the green add button to open the available Document Repository for the Assessment Results entry. (See Step e. to add **new** Related Documents.)

b. To access the available documents, click on the folder under the home symbol.
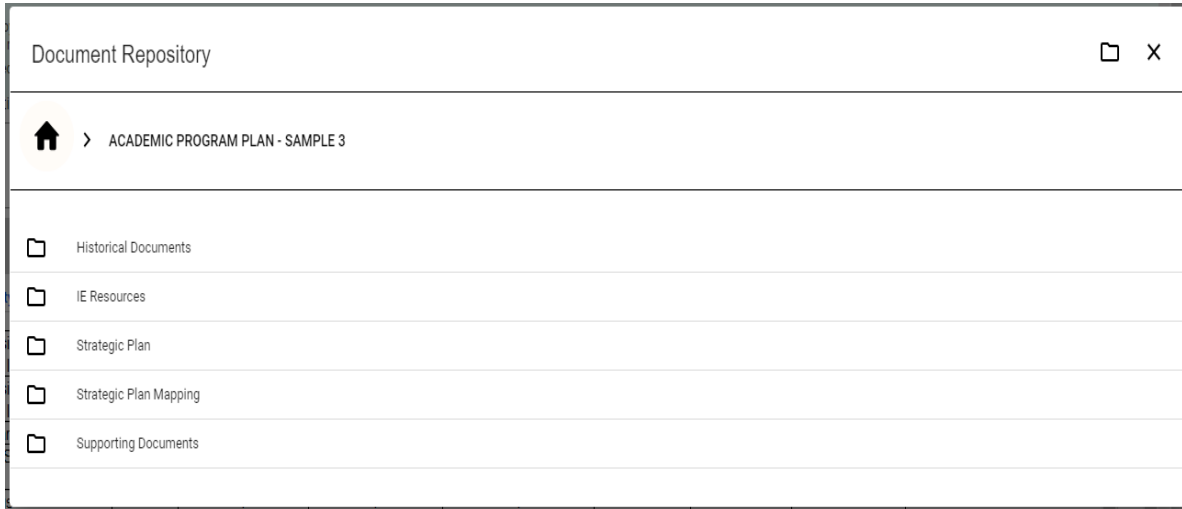
c. Click on the Supporting Documents folder.
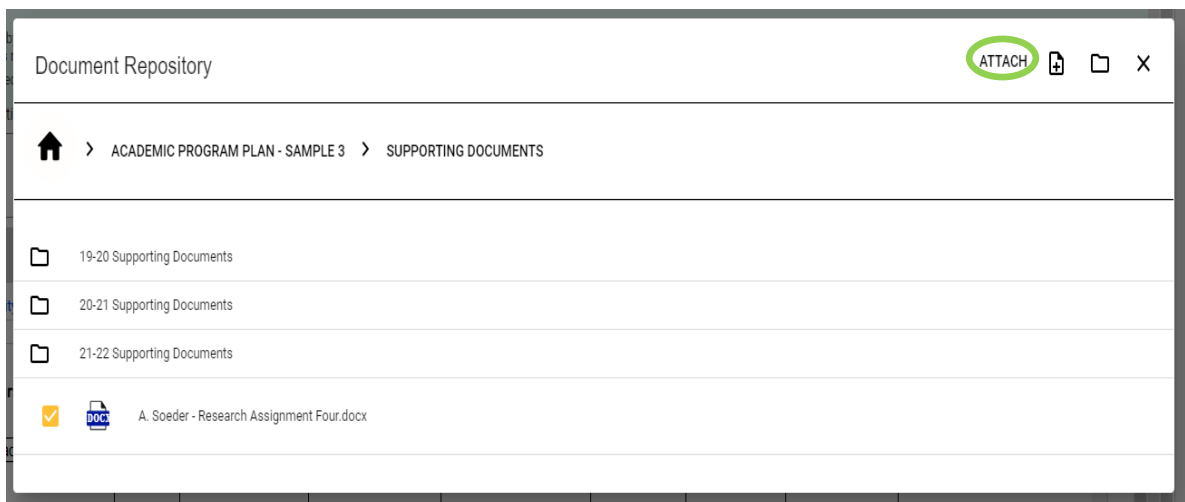
d. Select the document which needs to be attached and click on the ATTACH button.

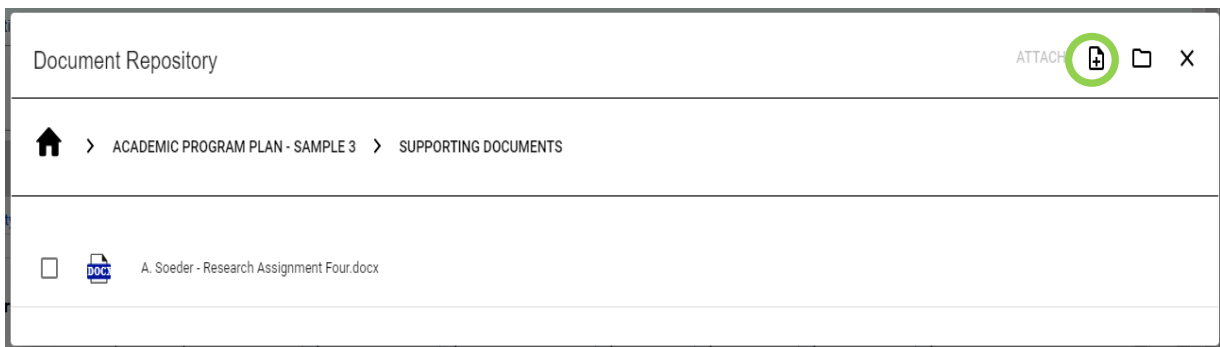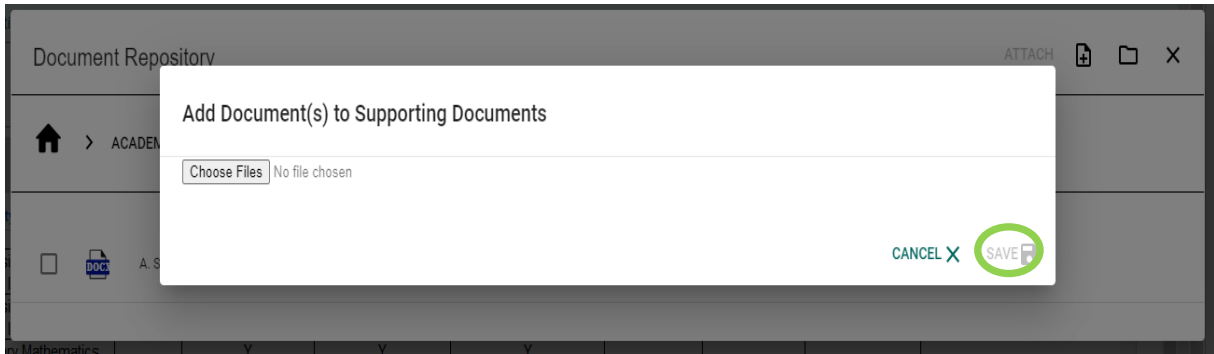e. To add **new** Related Documents to support the assessment results (not currently in the Document Repository), select the green add button.

f. Select Choose Files to browse for the files saved on your computer and select Open. Click Save icon.

g. After the documents have been saved, return to Step a to add to Results.

h. Once all applicable files have been related and all other fields are updated, click on Save located on top right corner, then click on close.

Mapping Goals or SLOs

Each academic program and support unit is asked to map their SLOs or goals to the goals of their college or division-level strategic plan. College and division-level strategic plans are mapped to the A&M-Commerce institutional strategic plan. Additionally, academic programs are asked to map their SLOs with marketable skills.

Navigation
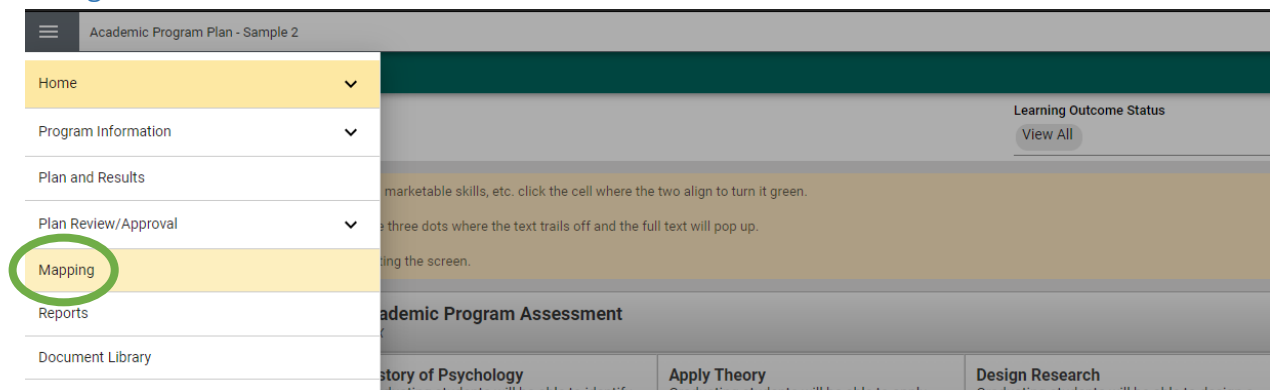
Within the Main Menu, navigate to **Mapping**.

Creating the Marketable Skills or College/Division level Map

a. Select the Mapping option from the drop down menu.
b. To map an SLO or Goal, click in the intersection of the SLO or Goal and the Marketable Skill or College/Division Goals. A green box with a cross mark appears to indicate mapping.
   ♦ To unselect a cross mark or unmap an intersection, click on the green box with the cross mark and it will disappear.
c. Click Save located on top right corner.
d. To navigate to another Map, select the Mapping dropdown list.

Reviewing Feedback from Department Heads/Supervisors, IE Representatives, and Deans/VPs

Reviewing and incorporating the feedback left by Department Heads or Direct Supervisors, IE Representatives, and Deans or VPs is an important element in strengthening the quality of assessment on campus.
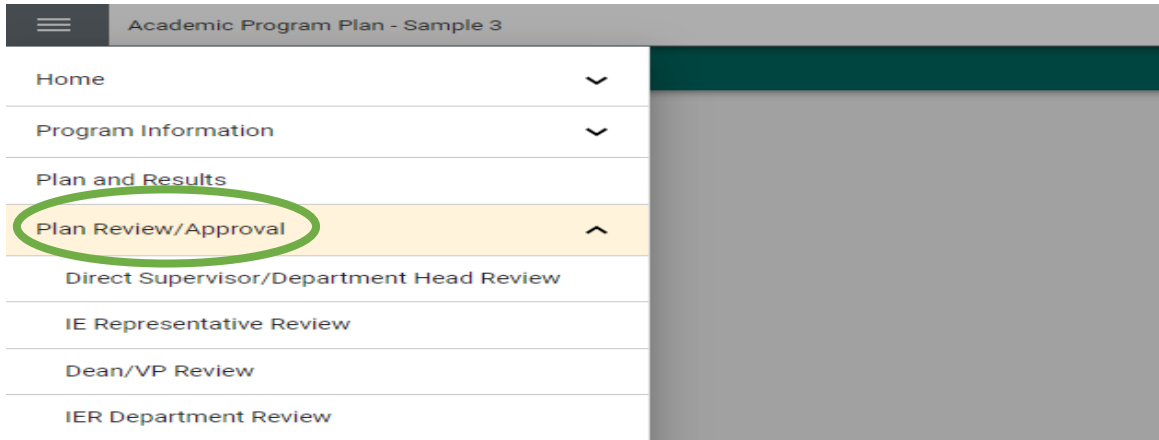
To review feedback completed by any of these parties, start by opening the Main Menu for your program or unit.

a. Select the **Plan Review/Approval** menu option.
b. From the drop-down menu options, click on the reviewer level whose feedback needs to be reviewed.
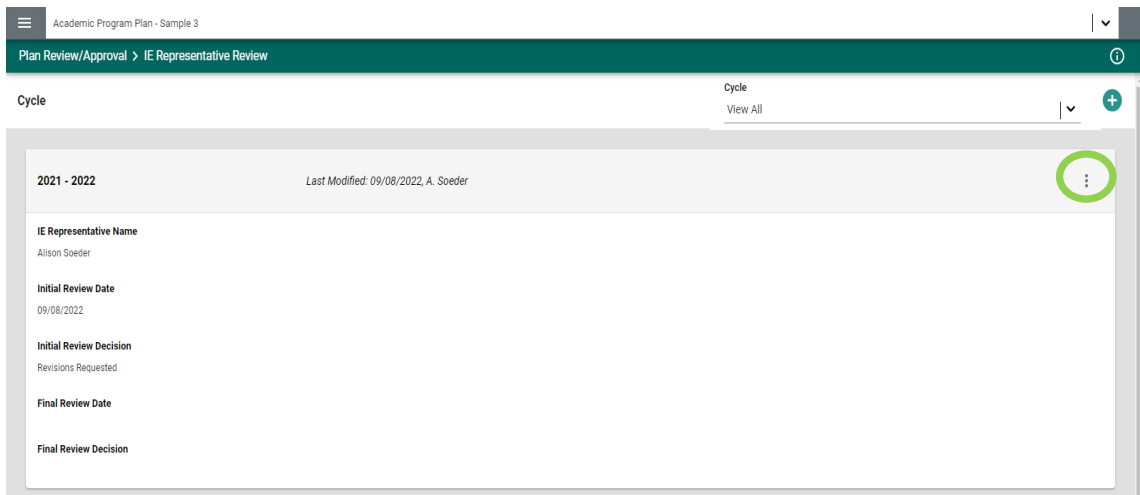
c. Click on the vertical ellipsis on the right side of the screen.
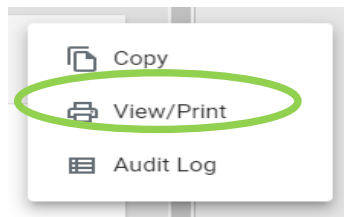
d. To access the Review/Approval form and completed rubric in Nuventive (also to print or download as a PDF), click on View/Print.

Results

Results are dated during the reporting year.
Acceptable
Results are aligned with goals, assessment methods, and standards of success.
Acceptable
Provide sample/population size (number assessed).
Acceptable
Provide descriptive data (e.g., headcount, percentage, average, median, mode, etc.).
Acceptable
Discussions of results are clear, concise, objective, and substantive.
Acceptable
Results conclusions identified (e.g., Standard of Success Met) are aligned with results provided.
Acceptable
Essential, relevant documents utilized to support the results discussion and analysis are attached, as applicable.
Acceptable
Results Comments and/or Requests for Revisions
Please attach the results of the satisfaction survey

- ◆ Feedback or requested revisions will be included in the text at the end of each section of the rubric under Comments and/or Requests for Revisions. Be sure to save your work.

e. Incorporate feedback and email the reviewer to let them know revisions have been completed and are ready for additional review.

Running a Report

Running a report in the Nuventive Improvement Platform allows IE Authors and reviewers to easily access a clear, easy-to-read report of annual assessments. These reports can be used to document continuous improvement efforts by the program or unit and to fulfill assessment reporting needs for external agencies or accreditors.
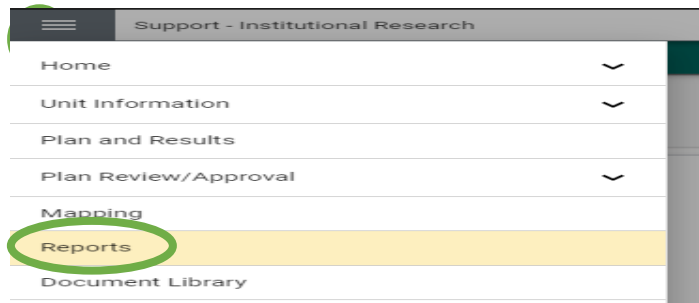
To run a report on your program or unit, start by opening the Main Menu and click on the **Reports** menu option.

IE Assessment: Two Column Report- This report shows the Student Learning Outcomes (SLOs) or Goals for each selected Academic Program or Support Unit Plan along with any Assessment Methods, Results, and Actions/Use of Results. The report is displayed in a two column layout. This report can be used as a comprehensive document of the annual Institutional Effectiveness reporting for the program.

Evidence of Seeking Improvement

Goal Statement: In completing the Institutional Effectiveness Forms, A&M-Commerce IE Authors will be able to document evidence of seeking improvement based on analysis of results.
Goal Status: Active
Planned Assessment Cycle: 2019 - 2020, 2020 - 2021, 2021 - 2022, 2022 - 2023, 2023 - 2024, 2024 - 2025
Mapping
AA - Provost: (X)
- Goal 14: X

Assessment Method	Result
Assessment Method Status: Active	Result Date: 10/06/2023
Assessment Type: Survey	Reporting Period: 2023 - 2024

Plan and Results

| Assessment Method	Result
Assessment Method: The IE Feedback Survey will be administered in the fall, following the close of the IE cycle. It will be distributed by email as a Qualtrics link sent out by the IE Officer. Results will be collected and reviewed by the IE Team prior to the close of the semester. For assessment of this goal, respondents will be asked to rate their level of agreement with the statement "The information I provided in the IE results allowed me to demonstrate how my program/unit is using the results of assessments." Rating options include Strong Agree (4), Agree (3), Disagree (2), Strongly Disagree (1) **Standard of Success**: 85% of respondents will agree or strongly agree with the statement "The information I provided in the IE results allowed me to demonstrate how my program/unit is using the results of assessments." **Notes**: Assessment method will begin 20-21. Questions were revised and minor updates made to the survey to better capture information about	**Result**: The IE Feedback survey was not sent out in June 2023, which was when the 23-23 IE Cycle concluded. The cycle due dates were moved up to allow for timely submission of IE Plans and Results ahead of the Reaffirmation Compliance Certification due date of September 8th. This was not sent out for two reasons: following the submission of IE Plans and Results on May 31st/June 2nd, many of the IE Authors were away for the summer, resulting in an anticipated low response rate. Secondly, the IE Offices were organizing and heading up the evidence collection and narrative crafting for the Reaffirmation Compliance Certification, with communications and work across campus since Fall 2022. There were concerns with the misunderstanding of the assessment objective of the survey in light of the push from IE on accreditation work, which would influence the feedback and results of the Feedback Survey. Normal survey administration will resume next cycle, with the use of the communication calendar developed by the AD. **Conclusion**: Inconclusive **If you implemented an action plan/modification in the prior year, please describe what impact it had on the results.**: N/A **Action/Use of Results**: With the early due date for assessment results, there was some confusion around what was due and when. However, an increase in communications and a focus on assessment process professional development was requested and well received by IE Authors and Reviewers. **Related Documents**: 2024 IE Spring Series Schedule with Descriptions & Links.xlsx

An excerpt of an example report appears above and it can be downloaded to your computer or printed.

To filter the report, select a split screen in the screen viewing options (See P. 6) at the top right and double-click on the mini report. You can filter by Status, Planned Assessment Cycle, Assessment Method Status, Reporting Period, and/or Conclusion. Click Run Report to display the filtered report. Click the X to close the filter options.
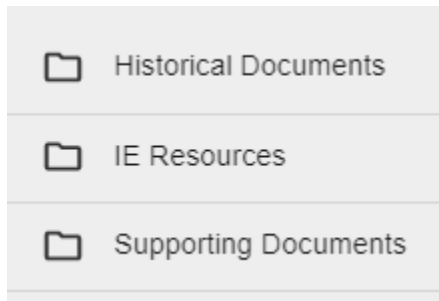
Document Library

The **Document Library** is where documents related to the assessments conducted by the academic program or support unit will be housed.
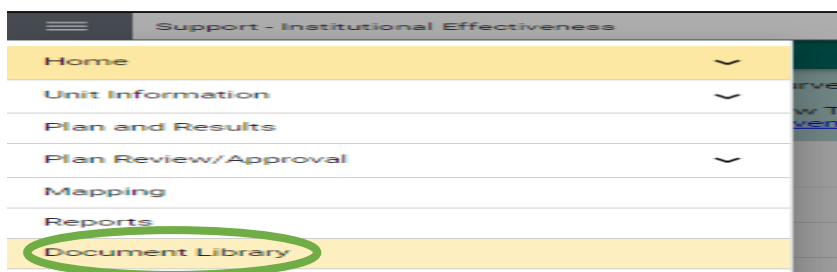
To navigate to the Document Library, click on the Main Menu and then select Document Library.

Within you will find Historical Documents, IE Resources, and Supporting Documents folders.

These are the existing default file structures that have been set up by the Nuventive Improvement team.

Historical Documents will typically house older IE documentation.

IE Resources will house files and resources from Institutional Effectiveness useful for conducting assessment and utilizing the Nuventive Improvement Platform.

The Supporting Documents folder can be used to upload supporting documents for your assessment plan or results. Examples include copies of surveys, exams, rubrics, data charts or tables, etc. Do not include individual examples of student work. In the Supporting Documents folder, each program and unit has subfolders preloaded to use to store assessment documentation for each cycle; for example, 21-22 Supporting Documents, 22-23 Supporting Documents, and 23-24 Supporting Documents. Documents uploaded into a Supporting Documents folder for a specific IE Cycle will automatically appear in the resource viewing pane when working in the Assessment Results area.

Adding a Folder, File, or Sub-Folder to the Document Library

To further organize your assessment documentation, you may find it helpful to add another folder or file to the Document Library for the program or unit.

Adding files to these folders will make them available to load in the Results card as Supporting Information and/or Related Documents.
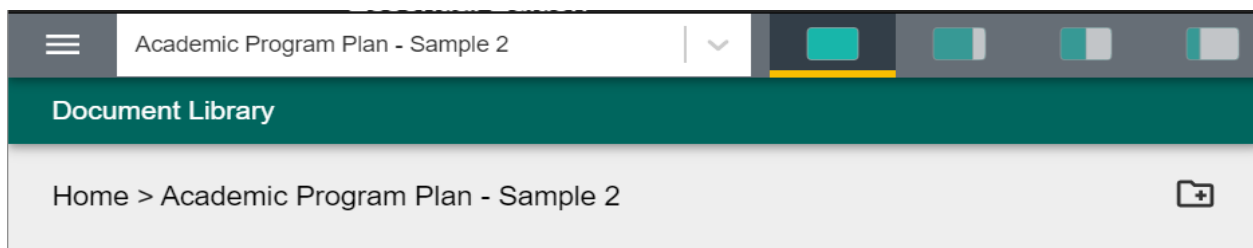

a. To add a **Folder** to the **Document Library** for the program or unit, select the **Add Folder** button to the right of the program or unit name. Give the folder a name and Save.
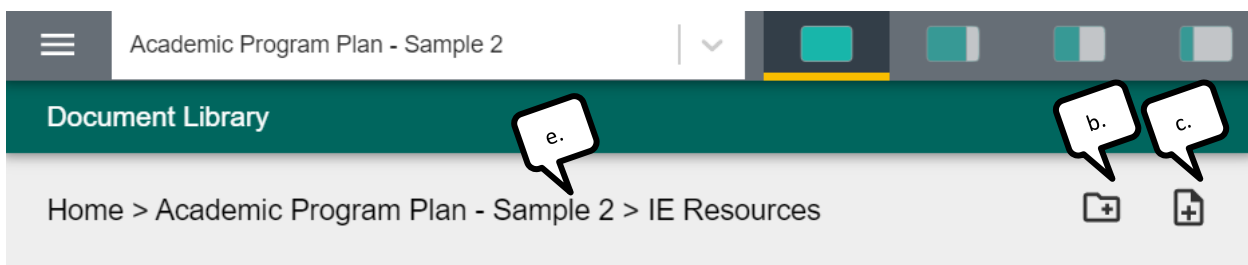
b. To add a **Subfolder** to an existing **Folder**, click into the folder and then select the **Add Folder** button. Give the folder a name and Save.
c. To add new Related Documents to support the assessment Results, in the appropriate folder, select the **Add Document** button.
d. Select Choose Files to browse for the files saved on your computer and select Open. Click Save icon.
e. To navigate back to the library, click on the program or unit name in the document path.

Editing a Folder or File

If you need to rename, share or delete a folder or open, download, copy URL, edit or delete a file, start in the Document Library.
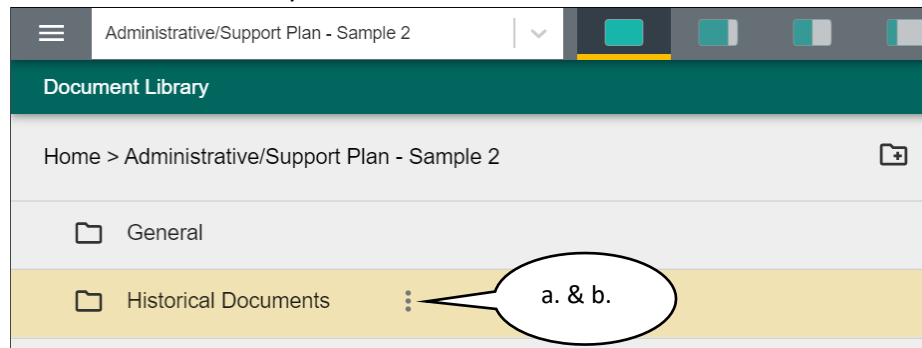
a. Hover over the folder or file name until it highlights yellow and the vertical ellipsis appear.
b. Click directly on the ellipsis and an additional option menu will appear. Select the functions needed and be sure to save any changes made.