Academic Calendar Submission/Revision Process

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Presentation Overview

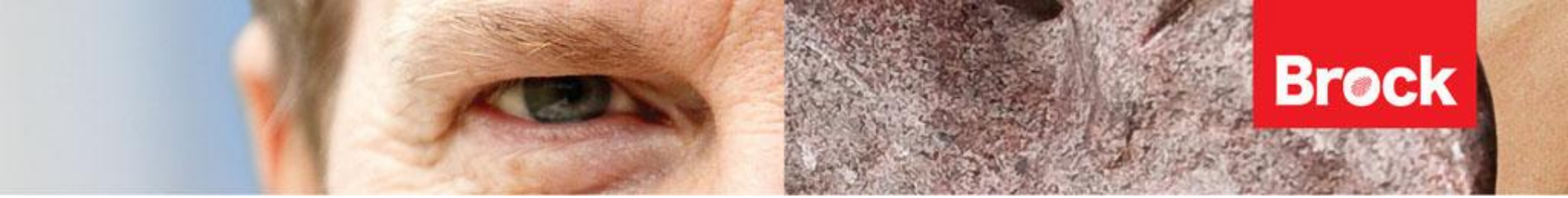
- Overview of the system – from where we were to where we've come!
- Implementation planning and roll out
- Project Gains
- Feedback and Fixes
- What do we still need to do?
- What happens next?
- Demo
- Questions?

Calendar Submission Process – How it used to work

Academic Unit Chair	▪ Downloaded the current calendar entry, in Rich Text Format (RTF), from the Web. ▪ Downloaded in RTF the calendar submission template. ▪ Departments filled in the template (proposals/explanations, etc.) and updated the calendar entry as needed using MS Word. ▪ The Unit head (Chair) signed off on the template and sent it via interoffice mail to the Dean. The calendar entry revisions and the template were sent via e-mail to the Undergraduate Program Committee.
Dean	▪ The Deans had a workgroup review all unit/dept. submissions and recommend either changes or approval. ▪ If approved, the Dean signed the template then forwarded the signed copy by inter office mail to the Undergraduate Program Committee as well as via e-mail a copy of the template and the revised calendar entry.

Submission Process – Con't

Undergraduate Program Committee (UPC)	▪ Various working groups reviewed each submission in detail and recommended either changes or a return to the Academic Unit for re-editing, or approval. ▪ If the working group recommended approval, the Undergraduate Program Committee submitted a report to Senate, in PDF format, with the proposed changes and the signed submissions.
Senate	▪ Senate reviewed the report and either returned the report to the Undergraduate Program Committee for further review or approved the calendar copy for the incoming year.
Official Calendar	▪ Calendar for publication (paper and Web) was produced using Adobe PageMaker since 1994. ▪ Preparing the Printed version of the calendar, the RTF files were imported into a single PageMaker document, where formatting took place. ▪ Preparing for the Web, each RTF file was imported into separate PageMaker documents then exported to HTML and e-mailed to a web space for automatic pick up into the web calendar. There were additional controls for parsing and releasing the web calendar for public viewing.



Challenge Highlights

- Downloads to RTF format were not always clean. HTML code was sometimes downloaded in the file. Components of formatting were frequently lost.
- Dependant on the track changes facility in MS Word. Sometimes changes were accidentally submitted without track changes identification or formatting.
- No way to tell where the submission was in the process without making phone calls.
- Sign offs all paper based.
- Use of desktop application (PageMaker)
  - ✓ Software was no longer supported by Adobe.
  - ✓ The upload process from PageMaker to Web was very sensitive to formatting codes. Text was frequently lost or not handled correctly by the systems.
- Costly
  - ✓ Cumbersome semi-manual process at all levels.
  - ✓ Extensive time spent on format and design cleaning by the Editor.

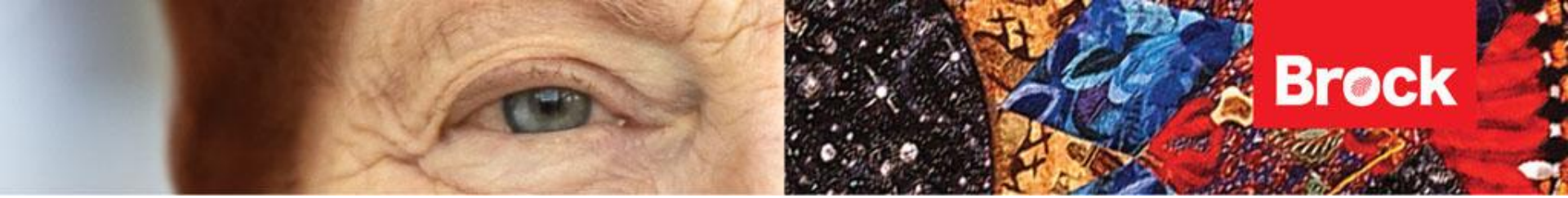
New Design – OUR DREAM!

(It began on a white board)

- Design a system by which all editing and document travel is electronic.
- Why are we downloading the entry to edit only to upload it again once approved?
  - ✓All editing will happen at the server level with appropriate login access and logging.
- Removal of desktop applications (PageMaker and MS Word).
  - ✓We will no longer download.
  - ✓We will no longer produce printed copy.
  - ✓No longer need this program to ‘push’ copy up to the server.
- Elimination of download flaws reduces the time spent by the editor on formatting.
- Built in Design controls. (i.e., proposal layout, course description layout, etc.)
- Electronic sign off process with edit lockout stages.
- Built-in track changes. No ‘off’ or ‘accept changes’ buttons.
- Submission status available on-line at each level of access.

Overview New System – Academic Components

Academic Unit: Chair or Designate	✓ **Edit access** with track changes - logged with date, time, change and user login; ✓ **Sign off control.** Triggers removal of edit access and move of the file to Dean's list for review and approval; ✓ **Progress status bar.**
Academic Unit: Dean	✓ No edit access. ✓ **Sign off control.** Approval moves the submission into the UPC level. Rejection returns the file to the Academic unit queue and restores edit access. Return of the file is accompanied by a reason; ✓ **Progress status bar.**



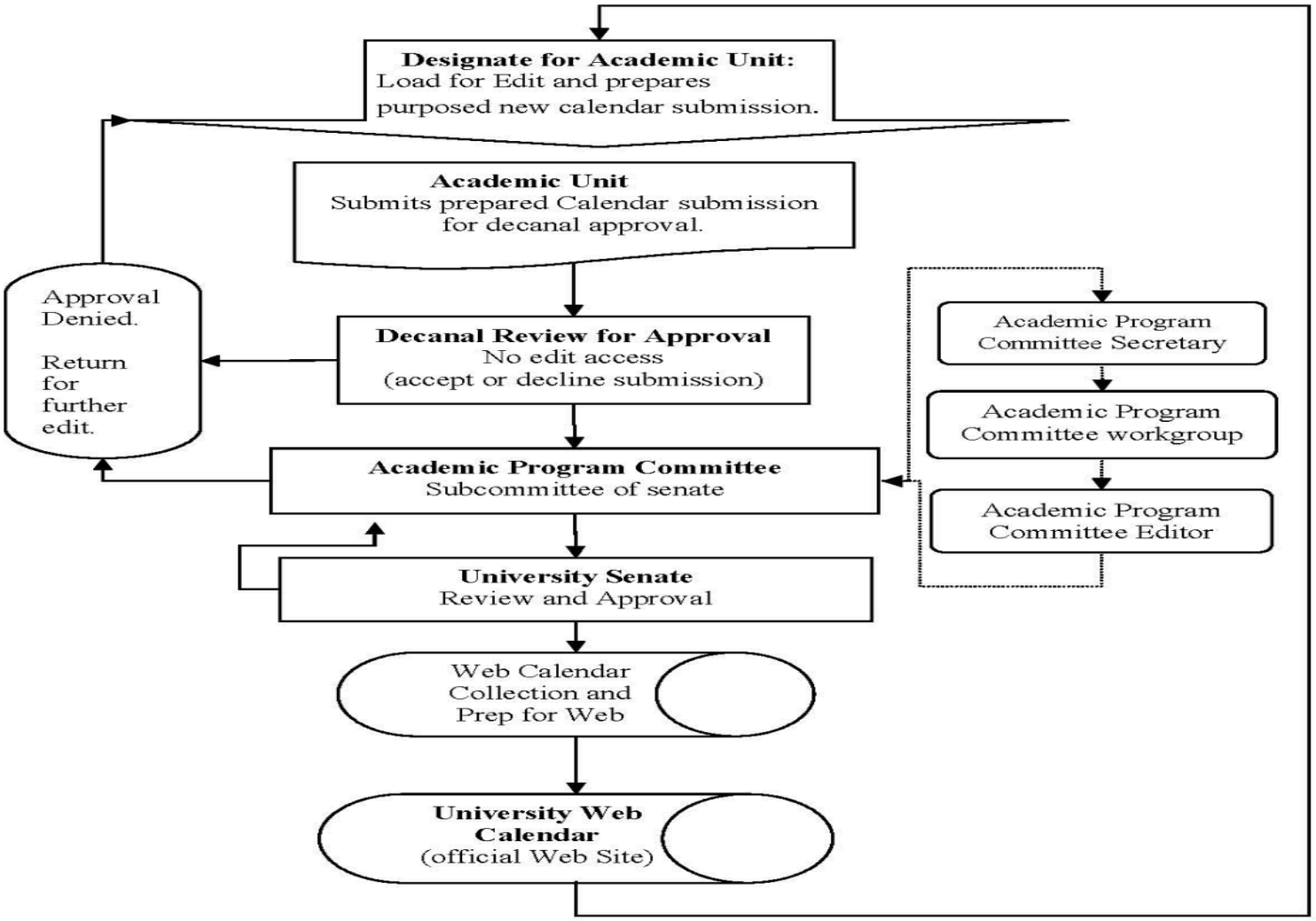
Overview of New System – Committee Level

Undergraduate Program Committee	✓ **Edit access** with track changes - logged with date, time, change and user login. All edits require an explanation which will be visible to the academic unit. ✓ **Sign off control**. Approval moves the submission into the Senate level. Rejection returns the file to the Academic unit and restores edit access. Return of the file is accompanied by a reason; ✓ **Progress status bar**.
Senate	✓ **Sign off control**. Approved by Senate – Registrar signs off which moves submission to publication. Rejection returns the file to the UPC level and restores edit access. Return of the file is accompanied by a reason; ✓ **Progress status bar**.

Overview of New System – Publication Level

Publication of Calendar	✓ **Edit access** without track changes: Logged with date, time, change and user login; ✓ **Post copy approval.** Changes approved after copy has been through Senate implemented only at this level; ✓ View secure by login. ✓ Go live button for public viewing. ✓ **Progress status bar**.

Appendix II: Academic Program Calendar Flowchart



Here we go!

Implementation Planning and Roll Out

System Testing

- ✓Ensured that the application was tested thoroughly from programmers.
- ✓Tested to verify if the product was both PC and Mac compatible.
- ✓For the system to be user-friendly, logical and efficient, three staff members were chosen from different Faculties to test the system (pilot).

Communication Plan

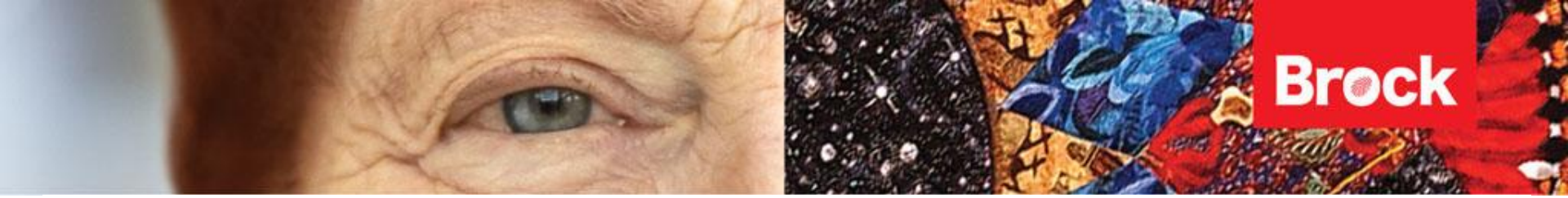
- ✓Notification to all units of new process.
- ✓Training.
- ✓Request for information/feedback.

Personnel Training

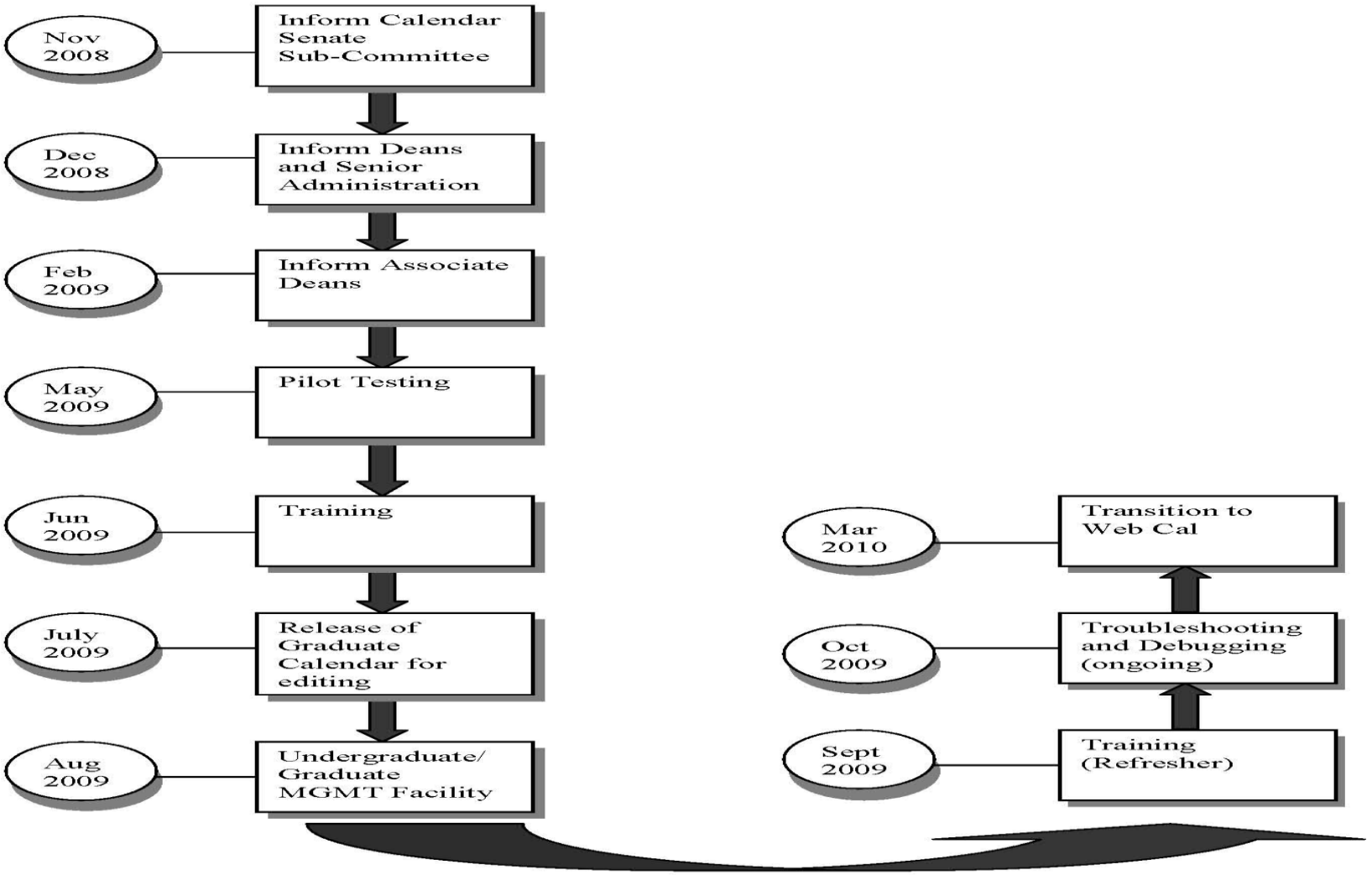
- ✓Organized and set up schedules for training all academic units.
- ✓Ad hoc training.
- ✓Provided user documentation.
- ✓Provided additional support to the users as needed.

Roll out

- ✓Dean's meeting with the unit heads – identify designates.
- ✓Troubleshooting for academic units – August/September.
- ✓Troubleshooting at administrative levels of the tools and editing features.
- ✓Finalized program development at end stages.



Academic Project Calendar Project Milestones



Project Gains

- Designed a system by which all editing and document travel is electronic.
- No longer downloading the entry to edit only to upload it again once approved All editing designed now to happen at the server level with appropriate login access and logging.
- Removal of desktop applications (PageMaker and MS Word).
  - ✓ No longer download.
  - ✓ No longer produce a printed copy.
  - ✓ No longer need this program to ‘push’ copy up to the server.
- Elimination of download flaws reduces the time spent by the editor on formatting.
- Built in design controls. (i.e., on proposal layout, course description layout, etc)
- Electronic sign off process with edit lockout stages.
- Built-in track changes. No ‘off’ or ‘accept changes’ buttons.
- Submission status available on-line at each level of access.
- Reduced need for hard copy printing at various stages of the submission process.

Feedback and Fixes

- Proposal re-ordering not available.
  - ✓ Added drag/drop capability.
- Tracking change of ‘bugs’.
  - ✓ Automatic renumbering developed.
- Label Display for Prerequisites & Co-requisites.
  - ✓ Now displayed as Prerequisite(s) or Co-requisite(s).
- Issues with course title having 45 character limitation.
  - ✓ (Example: CHYS 3V91 title is: “2009-2010: Children and Youth in Indigenous Communities”)
- Multiple access roles (Example: Chair is also the Designate).
  - ✓ Immediate response was to handle manually.
  - ✓ User can now identify their role at login.
- Overall – well received (warts and all).

The focus this initial phase was to ensure satisfaction across all academic units. This was achieved, evident in the following testimonials from Staff, Chairs, and Deans – **the key COMMUNICATION!**

- **"The 'two-step' UPC change where 'and' is involved is working like a dream. Thanks."**
- **"This new program though to facilitate on-line UPC submission process will be nothing short of fantastic once the minor flaws are worked out!"**
- **"Thank you! That's handy!"**
- **"BTW, this on-line approach is a vast and welcome improvement over the former system. Thank you to all those involved for enabling administrative assistants (among other UPC participants) to perform this particular task with much greater ease!"**
- **"It is so much more efficient."**

What do we still need to do?

- Build in to current version:
  - ✓ Subject code change at the Designate level.
  - ✓ Adding a new program/chapter.
  - ✓ Control to allow for the start of the next calendar cycle. (Manually assigned start)

- Changes to Heading Style/Level, inconsistencies in heading styles. (Example: Sections like Honours and Pass)

- Planned - Version 2 (for items out of project scope for beta version).
  - ✓ Currently designed for once through only. Allow for multiple passes through for the same calendar.
  - ✓ Automate update of entries affected by cross listed courses.
  - ✓ Incorporate external support documents.
  - ✓ Automate Senate report.
  - ✓ Email notification once the submission is approved or rejected.

DEMO

Academic Calendar Submission demo link

Questions?

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