



Course Equivalency System



# 2nd Reviewer

Last Updated: March 31, 2015

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## Introduction

The Course Equivalency System is a web-based application. It is used to simplify the process of students finding and requesting course equivalencies when researching or applying for the Course Equivalency System. This project will contribute to the University's larger goal of increasing participation in these programs, as per the Strategic Enrolment Management Plan.

The general process starts with the student wanting to know if a course from an External institution is equivalent to a McGill course. Students can access the Course Equivalency public database. If the course(s) that the student is looking for is not in the database, the students can submit a course equivalency request(s). A request number is created and is emailed to the student, along with a contact name (reviewer). The reviewer(s) can also submit a course equivalency request on behalf of a student.

While the request is immediately available to the reviewer to start working on, the email notification is only sent to the Reviewers the next business day. If the Reviewer(s) have already processed the request on the same, then they will not get the email notification. Reviewers will take a look at the student's request and approve or disapprove it.

Depending on the Faculty, there will either be 1<sup>st</sup> Reviewer(s), or 1<sup>st</sup> and 2<sup>nd</sup> Reviewers. If there are no Reviewer(s) set up, the Faculty Administrator will need to assign Reviewer(s) for that request. However, if there are no 1<sup>st</sup> Reviewers assigned for a particular subject that has a pending request, an email notification will be sent to the Faculty Administrator. If there is no Faculty Administrator, a System Administrator will assign the appropriate Faculty Administrator.

This document will take you through all the functionalities available to the 2<sup>nd</sup> Reviewers and you will perform one or more of the following:

1. Search for course equivalency requests by request number or requestor's email address and view request details
2. Process and confirm the request
3. View a list of Faculty Administrators

### Note

#### Important Notes:

- Course equivalency decisions recorded in the course equivalency database are **NOT** and should **NOT** be made for a specific student.
- A decision as to whether an equivalency decision will apply to an individual student is done in Minerva Transfer Credit Assessment Form.



## Roles

**System Administrator:** They are able to manage Faculty Administrators, manage reviewers, and perform system administration tasks as well as search and view requests.

**Faculty Administrator:** They are able to manage reviewers, as well as search and review request(s) for their faculty and departments.

**Reviewers:** They are assigned by their Faculty Administrator to either be the 1<sup>st</sup> or 2<sup>nd</sup> Reviewer. There could be one or two levels of reviewers in a department. Here are some examples:

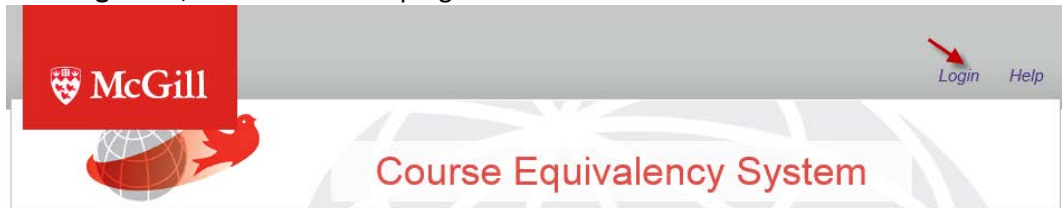
- There can be many 1<sup>st</sup> Reviewers and no 2<sup>nd</sup> Reviewer. This means the first person to assess the request will make the final decision.
- A person cannot be assigned 1<sup>st</sup> and 2<sup>nd</sup> Reviewer roles for the same subject. However, they can be assigned both roles for different subjects.
- If there are 1<sup>st</sup> and 2<sup>nd</sup> Reviewers, the 1<sup>st</sup> Reviewer will take a look at the request and make a preliminary decision. This request will go to the 2<sup>nd</sup> Reviewer who will make the final decision.



# Login

To log into the Course Equivalency System:

1. Open your web browser (i.e. Internet Explorer, Firefox or Safari) and enter the following URL: <https://nimbus-ssl.mcgill.ca/exsa/>
2. Click **Login** link, located on the top right corner.



3. Enter your \*McGill Username ([first.lastname@mcgill.ca](mailto:first.lastname@mcgill.ca)) and \*McGill Password.
4. Click on the **Submit** button.

A screenshot of the McGill University Authentication login page. The page features the McGill logo at the top left. The main heading is 'McGill University Authentication'. Below this, there is a paragraph: 'Log in using your [McGill Username](#) (first.last@mail.mcgill.ca or first.last@mcgill.ca) and McGill Password.' followed by a link: 'Use of this service is governed by the Policy on the [Responsible Use of McGill Information Technology Resources](#).' On the right side, there is a 'Login' form with two input fields: 'McGill Username:' and 'McGill Password:'. Below the password field is a link for 'Forgot Password?'. At the bottom of the form is a red 'Submit' button.

\* **Want to know more about your McGill Username and password and how to reset it ?** [Click here](#)

**Can't login?** Contact IT Service Desk by [clicking here](#)



## Main Screen

After you have logged into the Course Equivalency System, you will be presented with:

The screenshot shows the main screen of the Course Equivalency System. At the top left is the McGill logo. The top right navigation bar shows the user is logged in as 'riyad.zienni@mcgill.ca' and provides links for 'Log out', 'Home', and 'Help'. The main heading is 'Course Equivalency System'. Below this is a welcome message and a list of search options: 'Enter the Course information (Title, Subject, or Course Number) and select whether it is taught at McGill or an External Institution.', 'Select a Country and the State/Province (if applicable).', and 'Enter the Name of an External Institution. Only universities that McGill has approved for Exchange/Study Away are included.' A link to 'Frequently Asked Questions' is also present. The search form is divided into three sections: 'Course' (with radio buttons for 'McGill' and 'External', and input fields for 'Course Number' and 'Title'), 'External Institution' (with a dropdown for 'Country', an input field for 'State/Province', and an input field for 'Institution Name'), and 'Status' (with checkboxes for 'Equivalent', 'Not Equivalent', and 'Include Expired Decisions'). A red box highlights the search form, and a red arrow points to the 'Search' button. At the bottom, there is a disclaimer and the McGill logo.

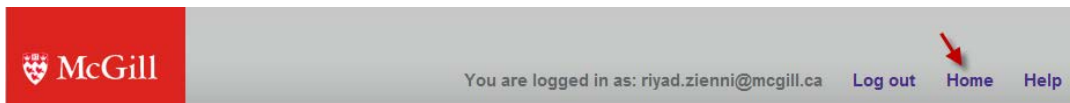
1. **Username:** displays your username and hover your mouse to see your role (e.g. System Administrator).
2. **Logout:** allows you to exit of the system.
3. **Home:** allows you to perform administrative tasks.
4. **Help:** it will bring you to a FAQ page.
5. **Search criteria:** allows you to search for McGill or External course equivalency.



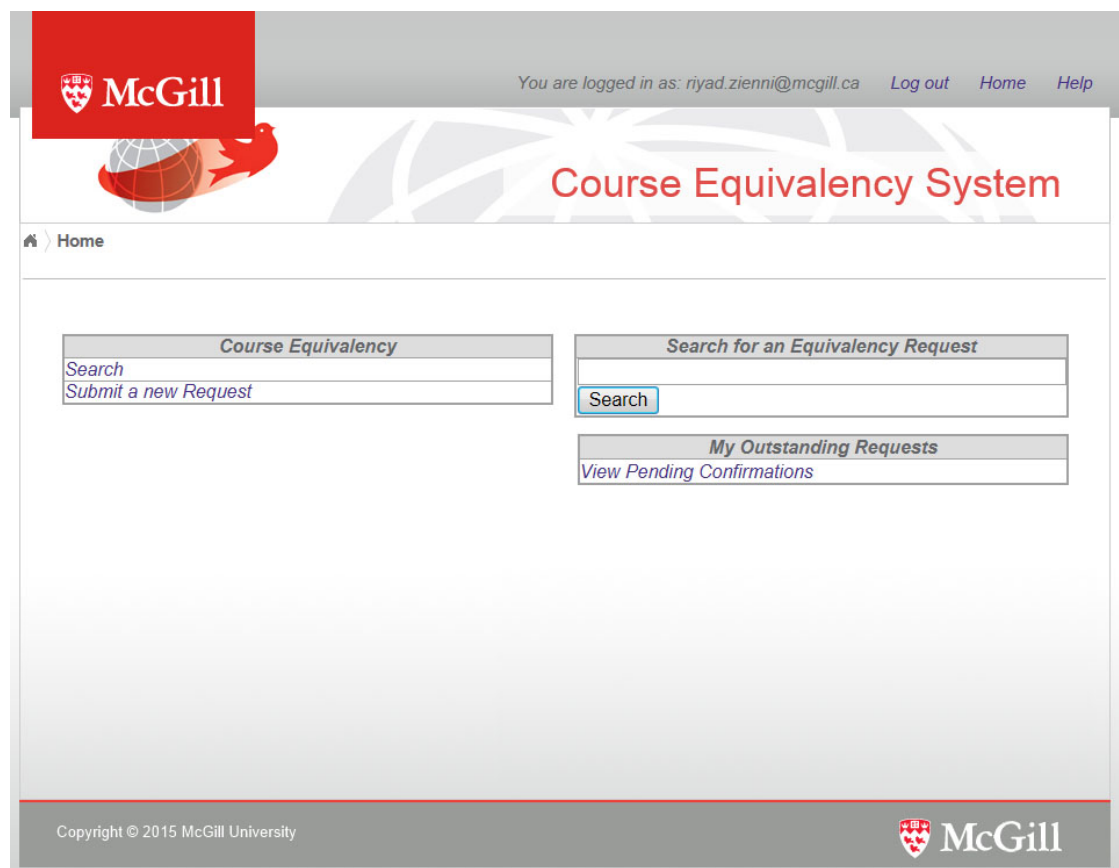
# Home Menu

To do administrative tasks, you will need to go the Home menu.

1. Log into Course Equivalency System.
2. Click on the **Home** link.



3. From Home, you will have 3 sections:
  - a. **Course Equivalency:** It allows you to search for any McGill or External course(s).
  - b. **Search for an Equivalency Request:** It allows you to view the status of a request made by the students.
  - c. **My Outstanding Requests:** View Pending Confirmations function is only for 2<sup>nd</sup> Reviewer(s). After the 1<sup>st</sup> Reviewer has taken a look at the request, it will be accessible for the 2<sup>nd</sup> Reviewer to make the final decision.

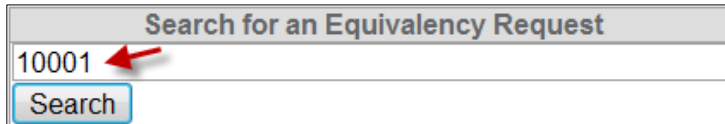


## Search for an Equivalency Request

This section allows you to search for a course equivalency request.

To search for a request or an email:

1. Enter the request number or email field in the **Search for an Equivalency Request** section.



The screenshot shows a web form titled "Search for an Equivalency Request". It features a text input field containing the number "10001". A red arrow points to the input field. Below the input field is a button labeled "Search".

2. Click on the **Search** button.

You will see the details of the request. For more information, go to the [Search for an Equivalency Request Details Page](#) on page 9.






## Search for an Equivalency Request Details Page

1 Request Number or Email \* 10001

2 Action Required: Assess By: No reviewers assigned

3 Request Information  
 Request Number: 10001 Requested By: exsa.student@mail.mcgill.ca  
 Current Status: PENDING On: 10-Feb-2015

4 Requested Equivalency

Beijing Concord College of Sino-Canada (Beijing, China)			
Course	Title	AU	Syllabus
ECO111	Economics	15.0	 View

McGill University	
Course	Title
FINE	Finance

Student Comments:

History

5

Status	On	By	Decision
PENDING	10-Feb-2015	exsa.student@mail.mcgill.ca	

McGill University		Beijing Concord College of Sino-Canada (Beijing, China)	
Course	Title	Course	Title
FINE	Finance	ECO111	Economics

Status: Valid Until End of:  
 Justification(s): []  
 Comments:

1. **Request Number or Email:** It displays the request number or email. If you want to do a new search, just enter a new request number or email and click on the Search icon.
2. **Action Required:** If the status of the request is Pending or Confirm, this field displays as **Assess** and it shows who will be reviewing the request on the right. If the status of request is 'Final', it will not show the **Action Required** area.
3. **Request Information:** It shows you the request number, the McGill email address of the requestor, the current status and when the request was created. There are several statuses; see section 5 (History) below for definitions.
4. **Requested Equivalency:** it displays the course equivalency between the External and McGill courses: name of institution, course number and title as well as Student Comments. Click **View** to view the syllabus, if provided.



5. **History:** It shows you the history of the request status(es):
  - a. **Pending:** no one has made a decision yet.
  - b. **Final:** The first 'Final' status means a decision has been made by the 1<sup>st</sup> or 2<sup>nd</sup> Reviewer. If you see more than one 'Final' status, it means that a decision was modified by Enrollment Services Administrator.
  - c. **Preliminary decision:** a decision has been made by the 1<sup>st</sup> Reviewer and is waiting for the 2<sup>nd</sup> Reviewer to confirm the decision.
  - d. **Incomplete:** The request did not have enough information or accurate information (e.g. wrong syllabus) to enable a reviewer to make a decision. The requestor will receive an email about it and he or she will have to create a new request with the proper information.



# My Outstanding Requests

The role of the 2<sup>nd</sup> Reviewer is to take a look at the request that the 1<sup>st</sup> Reviewer deems to be equivalent and then you will have to make the 'final' decision. As soon as the 1<sup>st</sup> Reviewer finishes the assessment of the request, it is immediately available to you. However, you will get a reminder email the next day if you did not have a chance to access your outstanding requests.

## Note

### Important Notes:

- Course equivalency decisions recorded in the course equivalency database are **NOT** and should **NOT** be made for a specific student.
- A decision as to whether an equivalency decision will apply to an individual student is done in Minerva Transfer Credit Assessment Form.

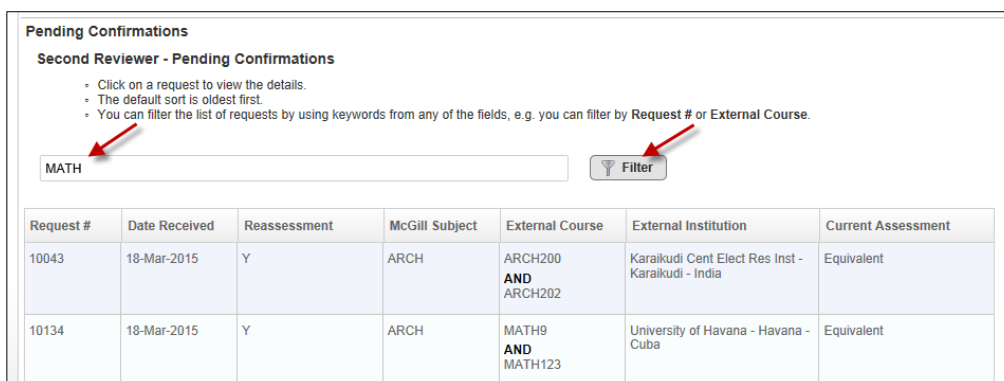
## View Pending Confirmations

This function is only available for the 2<sup>nd</sup> Reviewer(s).

1. Click **View Pending Confirmations** from the My Outstanding Requests section.



2. You will see all the requests. You can use the **Filter** button to search on any field. For example, you can filter to display the requests for a specific McGill Subject.



The image shows a screenshot of the 'Pending Confirmations' interface. At the top, there is a header 'Pending Confirmations' and a sub-header 'Second Reviewer - Pending Confirmations'. Below the sub-header, there are instructions: 'Click on a request to view the details.', 'The default sort is oldest first.', and 'You can filter the list of requests by using keywords from any of the fields, e.g. you can filter by Request # or External Course.' Below the instructions, there is a search input field containing the text 'MATH' and a 'Filter' button. Below the search field and button, there is a table with the following data:

Request #	Date Received	Reassessment	McGill Subject	External Course	External Institution	Current Assessment
10043	18-Mar-2015	Y	ARCH	ARCH200 AND ARCH202	Karaikudi Cent Elect Res Inst - Karaikudi - India	Equivalent
10134	18-Mar-2015	Y	ARCH	MATH9 AND MATH123	University of Havana - Havana - Cuba	Equivalent



If you use the filter option and then you want to reset the filter, just remove the text from the text box and click on the **Filter** button again.

- Click on the request to see the details.

**Pending Confirmations**

**Second Reviewer - Pending Confirmations**

- Click on a request to view the details.
- The default sort is oldest first.
- You can filter the list of requests by using keywords from any of the fields, e.g. you can filter by **Request #** or **External Course**.

Request #	Date Received	Reassessment	McGill Subject	External Course	External Institution	Current Assessment
10134	18-Mar-2015	Y	ARCH	MATH123 AND MATH9	University of Havana - Havana - Cuba	Equivalent
10037	18-Mar-2015	Y	ARCH	MATH52222	Concordia University - Montreal - Canada	Not Equivalent
10133	18-Mar-2015	Y	ARCH	MATH1 AND MATH8	University of Havana - Havana - Cuba	Equivalent

- You will see the Assess Request page containing the equivalency details of the request. Review the request.

**Assess request**

**Request Details**

Assess request infotext placeholder ==> change me in messages.properties (exsa.request.assess.request.infotext)

**Equivalency a**

Karaikudi Cent Elect Res Inst (Karaikudi, India)				McGill University	
Course	Title	AU	Syllabus	Course	Title
ARCH202	test2	45.0	<input type="button" value="View"/>	ARCH	Architecture
ARCH200	test Title	45.0	<input type="button" value="View"/>		

**Status:** Equivalent **Valid Until End of:** Winter 2018  
**Justification(s):**  
 adding new justification for testing QA  
**Comments:**

**Related Equivalencies b**

No related equivalencies were found.

**Request Details c**

Receipt Number	Requested Date	Requester Name	Email
10043	17-Mar-2015	Riyad Zienni	riyad.zienni@mcgill.ca

**Preliminary Decision Details d**

Reviewer Name	Reviewed Date	Email	Decision
Exsa Test	18-Mar-2015	exsa.test@mail.mcgill.ca	EQUIVALENT



- a. **Equivalency:** it displays what the 1<sup>st</sup> Reviewer assessed on the course equivalency between the External and McGill courses: name of institution, course number, title and AU (accreditation units for engineering only) as well as the justification. Click **View** to see the syllabus, if provided.
  - b. **Related Equivalencies:** allows you to view all of the courses that are already submitted with the status of 'Pending', 'Equivalent' or 'Not Equivalent'. You can also find another request by clicking the **Search other decisions** button. This brings you to the search page that you see when you first log in.
  - c. **Request Details:** It shows you the snapshot of the original request: Receipt Number, Requested Date, Requestor Name, Email.
  - d. **Preliminary Decision Details:** it displays the name of the 1<sup>st</sup> Reviewer, date of review, email and decision.
5. You will need to decide the following actions:
- a. **Confirm:** means you agree with the 1<sup>st</sup> Reviewer and the request status will be set to 'Final'.
  - b. **Modify:** means that you will make changes to the request (e.g. typos)
  - c. **Incomplete:** means that the request is missing document(s) or information is not useful in making a decision.
  - d. **Cancel:** brings you back to the previous page.

Go to the appropriate section below.

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## Confirm

After you have reviewed the request and you agree with the 1<sup>st</sup> Reviewer changes/decision, click on the **Confirm** button.

Now, the request status will be 'Final' and the requestor will receive a notification email on the same day. The request is now added to the Course Equivalency database.



## Modify

After you have reviewed the request and if you want to make changes (e.g. fix typos) to the Equivalency section, do the following steps:

1. Click on the **Modify** button. You can make changes to:
  - a. **External course:** course number, title, and AU. Click **View** to see the syllabus, if provided.
  - b. **McGill course:** course title and not the Subject.
  - c. Now you can add additional course(s).

### Note

You can add an External course or a McGill course. These are the only two possible combinations:

- 2 External courses equivalent to 1 McGill course
- 1 External course equivalent to 2 McGill courses.

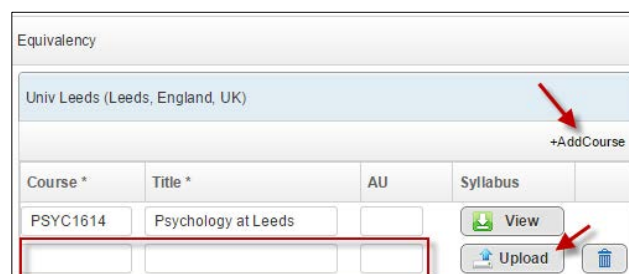
The system will not allow you to add 2 External courses and 2 McGill courses.

In the case of a reassessment request(s), the system will allow you to remove some additional courses where you think there is equivalency.

To add additional course(s) for:

#### External course:

- i. Click **+AddCourse**
- ii. Enter the course number, title and AU
- iii. Click **Upload** to include the syllabus, if required



Equivalency

Univ Leeds (Leeds, England, UK)

+AddCourse

Course *	Title *	AU	Syllabus
PSYC1614	Psychology at Leeds		<a href="#">View</a>
			<a href="#">Upload</a>

#### McGill course:

- i. Click **+AddCourse**
- ii. Start typing the **Subject** and the system will generate possible results
- iii. Enter the Course name



McGill University	
+Add Course	
Subject *	Course *
PSYC	PSYC - Psychology
<input type="text"/>	<input type="text"/>

## Tips

### Adding Additional External Courses:

Depending on your faculty setup and use of 2<sup>nd</sup> Reviewer Role, it is recommended that you upload a course syllabus for any additional course that you add to a request to enable 2<sup>nd</sup> Reviewer to confirm your decision.

- Decide whether this request is equivalent or not equivalent.

- Whether you click on the **Equivalent** or **Not Equivalent** button, you will need to complete the following:
  - Decide the **Justification** by clicking to check the appropriate justification(s).
  - Indicate the **Expire Decision at end of term**. Note that the system defaults it to three years from now. However, you can select an earlier term.
  - Add **Comments** (e.g. this can only be taken as a complementary course for engineering students), if needed. These comments are viewable to the public.



Submit Cancel

**Equivalent**

Justifications **a** b Expire Decision at end of term

J2  
 J3  
 J4

201801 - Winter 2018

Comments **c**

0 / 2000

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Equivalency

Beijing Con Coll of Sino-Can (Beijing, China)				McGill University	
Course	Title	AU	Syllabus	Course	Title
ECON00001	World Economy		<a href="#">View</a>	ECON199	FYS: Aspects of Globalization.

Student Comments: test comments

Related Equivalencies

No related equivalencies were found.

4. Click on the **Submit** button. You will get a success message.

Your decision has been successfully recorded and published to course equivalency database

[View Outstanding Requests](#)

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Equivalency Details

McGill University		Beijing Con Coll of Sino-Can (Beijing, China)	
Course	Title	Course	Title
ECON199	FYS: Aspects of Globalization.	ECON00001	World Economy

**Status:** Equivalent    **Valid Until End of:** Winter 2018  
**Justification(s):** J2  
**Comments:**





**Equivalent status:**

When you submit the request to be 'equivalent', there are two possible outcomes:

- If there is a 2<sup>nd</sup> Reviewer, the 1<sup>st</sup> Reviewer will see a message about this and the 2<sup>nd</sup> Reviewer will receive a notification email the next day.
- If there is no 2<sup>nd</sup> Reviewer, the decision is final and the requestor will receive a notification email on the same day. The request is now added to the Course Equivalency database.

**Not Equivalent status:**

You should always try to determine an equivalent McGill course for the student request. To consider the request to be "Not Equivalent", it means that there is absolutely no McGill course that is equivalent. This request will go to the course equivalency database and if there should be a similar request, the system will not allow it. In this case, you may wish to select a "XXX" to denote that it is not equivalent to any McGill Course

**Related Equivalencies:**

The system will allow you to add many courses to a requests to form an equivalency. However, the system will not allow you to establish an equivalency if a host course has an equivalency record in the database for the same subject.



## Incomplete

After you have reviewed the request, you want to reject this request because of missing documents/information.

1. Click on the **Incomplete** button.
2. Type the **Reason for Incomplete Submission**. You can enter up to 2000 characters.



The screenshot shows a web interface titled "Assess request" with a sub-section "Request Details". Below the title is a placeholder text: "Assess request infotext placeholder ==> change me in messages.properties (exsa.request.assess.request.infotext)". There are two buttons: a "Submit" button with a green checkmark icon and a "Cancel" button with a red X icon. Below the buttons is a text input field labeled "Reason for Incomplete Submission" with a red arrow pointing to it. At the bottom left of the field, it says "0 / 2000".

3. Click on the **Submit** button. You will get a success message.

### Note

#### **Incomplete:**

If the request is 'incomplete', the requestor will receive an email with the details you provide and he or she will have to create a new request with the required information.

#### **Not Equivalent status:**

You should always try to determine an equivalent McGill course for the student request. To consider the request to be "Not Equivalent", it means that there is absolutely no McGill course that is equivalent. This request will go to the course equivalency database and if there should be a similar request, the system will not allow it. In this case, you may wish to select a "XXX" to denote that it is not equivalent to any McGill Course.

#### **Related Equivalencies:**

The system will allow you to add many courses to a requests to form an equivalency. However, the system will not allow you to establish an equivalency if a host course has an equivalency record in the database for the same subject.

#### **Adding Additional Host Courses:**

While it is recommended that a 1<sup>st</sup> Reviewer attaches a course syllabus for any additional course they attach to a request, uploading a syllabus is not required by the 1<sup>st</sup> Reviewer. This means that it is possible that you may not be prompted to download/view a PDF file when pressing 'View PDF' button.

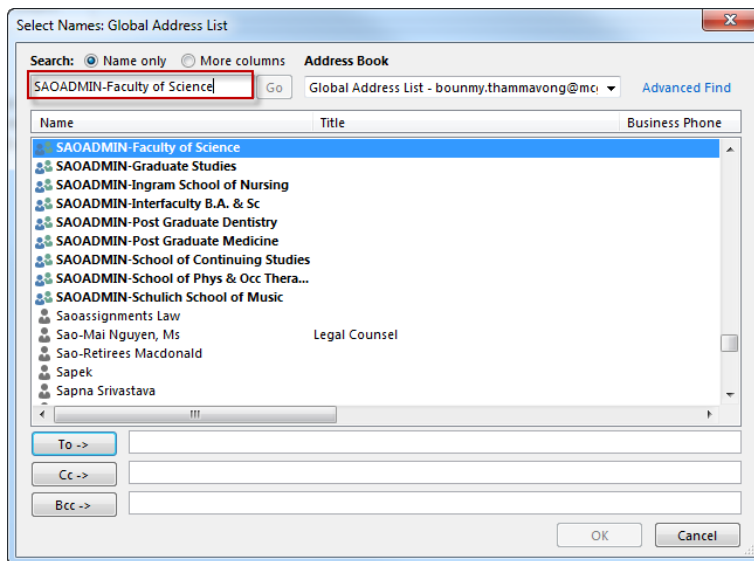


## View List of Faculty Administrators

A Faculty Administrator is responsible for assigning reviewers to McGill subjects that are administered within their faculty. The Faculty Administrator has some knowledge of how to use the course equivalency system and can be sought after for some guidance.

To view a list of your faculty Administrators,

1. Open Microsoft Outlook or Outlook Web Access.
2. Log in with your McGill Username/ Password.
3. Click **HOME > Address Book**.
4. Search for the Faculty group (e.g. SAOADMIN-Faculty of Science).



5. Double-click on the selected Faculty Group. You will see the names of the people in the Faculty group.

