

## Course Equivalency System

# System Administrator

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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.

The System Administrator role allows you to perform one or more of the following:

- 1. Add/remove 1<sup>st</sup> and 2<sup>nd</sup> Reviewer(s) per McGill Subject
- 2. Enable/disable 1<sup>st</sup> or 2<sup>nd</sup> Reviewer(s)
- 3. Manage Justifications
- 4. Modify course equivalency records
- 5. Search for course equivalency requests by request number or requestor's email address and view request details
- 6. View the list of Faculty Administrators
- 7. Request the addition/removal of a Faculty Administrator
- 8. Manage Info Text and email messages

#### **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: <u>https://nimbus-ssl.mcgill.ca/exsa/</u>
- 2. Click **Login** link, located on the top right corner.



- 3. Enter your \*McGill Username (<u>first.lastname@mcgill.ca</u>) and \*McGill Password.
- 4. Click on the **Submit** button.

₩ McGill	
McGill University Authentication	Login
Log in using your <u>McGill Username</u> (first.last@mail.mcgill.ca or first.last@mcgill.ca) and	McGill Username:
McGill Password.	McGill Password:
Use of this service is governed by the Policy on the <u>Responsible Use of McGill</u>	Forgot Password?
<u>Information Technology Resources</u> .	Submit

\* **McGill Username and McGill Password:** for more information, go to <u>http://kb.mcgill.ca/it/easylink/article.html?id=1006</u>

Forgot your McGill Password? Go to http://kb.mcgill.ca/it/easylink/article.html?id=1025

#### Can't login?

Contact IT Service Desk via email at <u>ITsupport@mcgill.ca</u> or by phone at 514-398-3398.

## **Main Screen**

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

WCGill	You are logged in as: rive Course E	ad zienni@mcgill.ca Log out Home Ho Equivalency System
<ul> <li>courses that have been assessed through the Tran</li> <li>Enter the Course information (Title, Subje</li> <li>Select a Country and the State/Province</li> </ul>	Only universities that McGill has approved for Exchange	rch options: McGill or an External Institution.
Course Course Course Number Title	External Institution Country Select	Status  Equivalent  Not Equivalent  Include Expired Decisions
revisions without prior notice. Credit and/or exe	base should be used as a guideline and is not student-s mption will not be awarded until official final results are r approval for any credit and/or exemption from their home	eceived and students obtain program and faculty

- 1. **Username**: displays your username and hover your mouse to see your role (e.g. System Administrator).
- 2. Log out: allows you to exit the system.
- 3. Home: allows you to perform administrative tasks.
- 4. **Help**: brings you to the FAQ page.
- 5. **Search criteria**: allows you to search McGill University's Course Equivalency Database by a McGill course or an External course.

#### Menu

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

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

₩ McGill	You are logged in as: riyad.zienni@mcgill.ca	Log out	Home	Help

- 3. From Home, you will have 4 sections:
  - a. Course Equivalency: It allows you to search for any McGill or External course(s).
  - b. **Reviewer Administration**: This sections allows you to look up, add or delete reviewers for a specific Faculty.
  - c. **Search for an Equivalency Request**: It allows you to view the status of a request made by the students.
  - d. **System Administration**: It allows you manage the justification of reasons for a request and modify any equivalence decision.

McGill	You are logged in as: riyad.zienni@mcgill.ca Log out Home
	Course Equivalency System
ome	
Course Equivalency	Search for an Equivalency Request
Search Submit a new Request	Search
Reviewer Adminstration Manage Reviewers	System Administration Manage Justifications Modify Equivalency Decisions

## **Reviewer Administration**

When a student requests a course equivalency, the system automatically sends an email to the reviewer(s) of the Faculty. If there are no reviewers, it sends a notification to the Faculty administrator. If there is no Faculty administrator, this notification is sent to the System Administrator.

As a System Administrator, you will have access to see all faculties. You will see the names of the 1<sup>st</sup> and 2<sup>nd</sup> Reviewers for a particular subject. If need be, you will be able to add or delete these reviewers on behalf of a department or faculty.

- 1. Click Manage Reviewers from the Reviewers section of the Menu.
- 2. Click on a Faculty.

Faculty	# of Subjects	# of Subjects with no assigned Reviewers
Desautels Faculty Management	11	9
Faculty of Agric Environ Sci	26	25
Faculty of Arts	51	43
Faculty of Dentistry	1	1

Note C

The column **"# of Subjects with no assigned Reviewers** " should always be **"0**". If it displays more than 0, this means that the Faculty Administrator has not assigned reviewer(s) for that subject(s).

3. Find the subject by filtering the column (Subject, Description, # of 1<sup>st</sup> Reviewers, # of 2<sup>nd</sup> Reviewers) or using the scrollbar at the bottom.

Y I	÷.	T T	7
Subject	Description	# of 1st Reviewers	# of 2nd Reviewers
AFRI	African Studies	0	0
ANTH	Anthropology	0	0
ARTH	Art History	1	0
CANS	Canadian Studies	0	0
CATH	Catholic Studies	0	0
CLAS	Classics	0	0
COMS	Communication Studies	1	0
DUMY	Dummy Black Out Subject Code	0	0
EAST	Asian Language & Literature	0	0
ECON	Economics (Arts)	2	1
< 1 /6 > >>			[1-10/5

If you use the filter option and then you want to reset the filter, just remove everything from the filter columns.
If the number of reviewers is = 0 for the 1<sup>st</sup> and/or 2<sup>nd</sup> Reviewer, it means that there are

no reviewer(s) are assigned, then the System Administrator will assign a Faculty Administrator or can assign reviewer(s) on their behalf.

4. Click on the selected subject.

U

Note

Ŧ	Ť	Ŧ	T
Subject	Description	# of 1st Reviewers	# of 2nd Reviewers
AFRI	African Studies	0	0
ANTH	Anthropology	0	0
ARTH	Art History	1	0
CANS	Canadian Studies	0	0

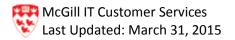
- 5. You will see a list of reviewers and their role. Note that the system displays the 1<sup>st</sup> Reviewers and then the 2<sup>nd</sup> Reviewers alphabetically.
  - a. To add a new reviewer:
    - i. Enter the name or McGill email address in the Search field and click on the **Search** button.

		¥
Name or McGill Email Address *	Riyad	🔎 Search

ii. You will see the results. Find the name and click on one of the roles.

Name	Email	Role	Action
Riyad Zienni	riyad.zienni@mcgill.ca	Ist Reviewer O 2nd Reviewer	🖨 Add

iii. Click on the **Add** button. A confirmation message will appear in green. The person will be added to the list of selected subject.



- b. To **modify** the reviewer's role from the list:
  - i. Find the name and click on the desired role.

Name	Email	1st Reviewer	2nd Reviewer	Activity Date	Action
Marlin Guirguis	marlin.guirguis@mcgill.ca	<b>V</b>		11-Feb-2015	Delete
Riyad Zienni	riyad.zienni@mcgill.ca			12-Feb-2015	Delete

- ii. It will automatically get saved. A confirmation message will appear in green.
- c. To **delete** a reviewer from the list:
  - i. Find the name and click on the **Delete** button.

Name	Email	1st Reviewer	2nd Reviewer	Activity Date	Action
Marlin Guirguis	marlin.guirguis@mcgill.ca			11-Feb-2015	Delete
Riyad Zienni	riyad.zienni@mcgill.ca			12-Feb-2015	💼 Delete

ii. You will see a Confirm reviewer deletion dialogue box. Click on the **OK** button to continue. A confirmation message will appear in green.

				Sec.	
Name	Email	1st Reviewer	2nd Reviewer	Activity Date	Action
Riyad Zienni	riyad.zienni@mcgill.ca			17-Mar-2015	Delete

## Search for an Equivalency Request

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

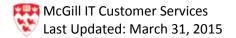
To search for a request or an email:

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

	Search for an Equivalency Request
10001 ┥	-
Search	

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

You will see the details of the request. For more information, go to the <u>Search for an</u> <u>Equivalency Request Details Page</u> on page 12.

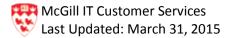


#### Search for an Equivalency Request Details Page

		1 Reques	t Number or Email *	10001					Search	
2	Action Requ	ired: Assess						By: No revie	wers assigned	
Re	Current Stat	mber: 10001 us: PENDII ivalency	NG Sino-Canada (Beijing, (	China)			R( O) McGill University	n:	exsa.student@mail.mcgill.ca 10-Feb-2015	
	Course	Title	nio oanada (boijing, t	AU	Syllabus		Course	Title		
F	ECO111	Econimics		15.0	View		FINE	Financ	e	
-	tudent Comm				(8					
sto										
	Status		On		Ву				Decision	
•	PENDING		10-Feb-2015		exsa.studer	nt@mail.r	ncgill.ca			
	McGill Univ	ersity				Beijin	g Concord Colle	ge of Sino-Ca	anada (Beijing, China)	
	Cou	rse		Title			Course		Title	
	FI	NE	F	inance			EC0111		Econimics	
	Status: Justification Comments:	Valid Until En (s): []	nd of:							

- 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.
- 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. Click **View** to see 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 the System 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.



## **System Administration**

As a System Administrator, you will be able to Manage Justifications and Modify Equivalency Decisions from the System Administration section.

System Administration Manage Justifications Modify Equivalency Decisions

#### **Manage Justifications**

This allows you to manage the database of justification reasons. Justification reasons should be generic in nature so that they apply to all faculties and departments. You can sort, add, delete, deactivate, or activate the justification reasons. All Faculty administrators and reviewers will be able to see and select from the same list of justification reasons (with "active" status) for course equivalency request(s).

#### Sort

You can sort the justification reasons. The default sort is by Justification column.

- 1. Click Manage Justifications from the System Administration section.
- 2. Click on the field that you want to sort by (e.g. Active). The up or down arrow will indicate if it is sorted in ascending or descending order.

	~			
Justification	Active	User	Activity Date	Action
	Active	User	Activity Date	Action

#### Add

You will add a new justification when a new one is needed to process a course equivalency request. For example, a department has requested a new justification reason and it is approved by Enrolment Services and now has to be added to the list of reasons.

- 1. Click Manage Justifications from the System Administration section.
- 2. Type in the reason in the Justification for Course Equivalency Decisions field.
- 3. Click on the Add button. A confirmation message will appear in green.

Justification for Course Equivalency Decisions	>
Not enough details in course description	🕂 Add
<u>&gt;</u>	



4. The newly created justification reason will be added alphabetically to the list as 'active'. This means that it will be available for all Faculty administrators and reviewers to use. Also, you will see your name and the date that it was created.

				Ac
Justification	Active	User	Activity Date	Action
Justification 1	Z active	Yuriy Sapanyuk	10-Feb-2015	Delete
Justification 2	active	Yuriy Sapanyuk	10-Feb-2015	Delete
Justification 3	V active	Yuriy Sapanyuk	10-Feb-2015	Delete
Justification 4	active	Yuriy Sapanyuk	10-Feb-2015	💼 Delete
Not enough details in course description	active	Bounmy Thammavong	11-Feb-2015	Delete
This is to justify that economics could be equivalent to any economics course	active	Marlin Guirguis	10-Feb-2015	Delete

#### Delete

You can only delete a justification reason if it has never been used. If it has been used, the delete icon is greyed out and you can only make it 'inactive'. This reason will not be available for use from then on.

- 1. Click Manage Justifications from the System Administration section.
- 2. Click on the **Delete** button on the right side.

ustification for Course Equivalency Decisions				
				Ad
Justification	Active	User	Activity Date	Action
Justification 1	active	Yuriy Sapanyuk	10-Feb-2015	Delete
Justification 2	active	Yuriy Sapanyuk	10-Feb-2015	Delete
Justification 3	active	Yuriy Sapanyuk	10-Feb-2015	Delete
Justification 4	active	Yuriy Sapanyuk	10-Feb-2015	💼 Delete
Not enough details in course description	active	Bounmy Thammavong	11-Feb-2015	💼 Delete
This is to justify that economics could be equivalent to any economics course	✓ active	Marlin Guirguis	10-Feb-2015	Delete

- 3. A Confirm justification deletion dialogue box will pop up. Click on the **OK** button to continue.
- 4. A confirmation message will appear in green. The reason disappears from the list.

#### Inactive

If you want the reason to not appear on the Justification list for use, do the following.

- 1. Click Manage Justifications from the System Administration section.
- 2. Find the reason from the Justification list.
- 3. Click to uncheck the active checkbox.

	Not enough details in course description	active	Bounmy Thammavong	11-Feb-2015	Delete
4.	A confirmation message will appear in gree	en. The reasor	n will now show	as "inactive".	
			-		

#### **Deleting a greyed out Justification**

It is not impossible to delete a greyed out justification. Doing so requires doing extra steps:

- 1. Inactivate (see section above) the justification so that no Reviewers can use it.
- 2. Run a report to see a list of all equivalency decisions currently using that justification.
- 3. Go to the equivalency decision request that has the justification that you want to delete.
- 4. Deselect the justification that you want to delete and choose another justification for the equivalency decision.
- 5. Repeat steps 3 and 4 to remove all of the justification that you want to delete.
- 6. When you are done, go to the justification and delete it.

#### **Modify Equivalency Decision**

This allows you to modify (e.g. typos, reason of justification, comments) equivalency decisions for McGill and External course(s). Note that for McGill course(s), you can only change the course number.

- 1. Click Modify Equivalence Decision from the System Administration section.
- 2. Search for a course and decide whether it is a McGill or External Course Number (e.g. Math).

External Institution	Status
Country	Equivalent
Select 👻	
State/Province	
	Include Expired Decisions
Institution Name	
	Country Select State/Province

3. Click on the Search button.

4. You will see your search results. Click to select the course that you want to modify.

								🔎 New Sear	ch	🛛 🥑 Refir	ne	Search
	3	McGill University				Extern	nal Ins	stitution				
Course	•	Title	•	Course	-	Title	-	Institution	•	Country -	-	Status
MATH112		Fundamentals of Mathematics.		MATH101	0	Fundamentals of Math		Universite de Sherbrooke		Canada		×
MATH254		Honours Analysis 1.	MMSSS2		Математика и статистика		Odessa I.I.Mechnikov National University		Ukraine		4	



5. You will see the Course Equivalency details. Click on the **Modify Decision** button.

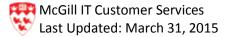
Pay close attention to the t	Status, equivalency expiry date (Va	and and the off and any comment	s regarding a co	urse's eligibility.
uivalency Details				
cGill University		Odessa I.I.I	/lechnikov Nation	nal University (Odesa, Ukraine)
Course	Title	Cou	rse	Title
MATH254	MATH254 Honours Analysis 1		3882	Математика и статистика
atus: Equivalent Vali	d Until End of: Winter 2018			
ustification(s): Justific Justific omments: Reviewer 1 co	ation 1 ation 2		0	odify Decision 🛛 🌮 New Search 🖉 😨 Bar
ustification(s): Justific Justific comments: Reviewer 1 co	ation 1 Join 2 Joint 2	2	0 N	, (c , (c
ustification(s): Justifica	ation 1 ation 2	By 280432614	01	odity Decision Decision Equivaent

- 6. You can modify the following items:
  - a. **External Course Information**: change the Course Number, Title, Accreditation unit (only for Engineering courses) and view the syllabus.

External Course Information Odessa I.I.Mechnikov Natior	n nal University (Odesa, Ukraine)		
Course Number *	Title *	Accreditation unit * (Engineering courses only)	Syllabus
MMSSS2	Математика и статистик		Uiew

b. **McGill Course Information**: change the Course, but not the Subject.

McGill Course Information		
Subject	Course	
MATH	254 - Honours Analysis 1.	



c. Decision: select Equivalent or Not Equivalent.



d. **Valid Until End of**: select one previous term from the current term, or any future term. For example, if we are currently in Term Winter 2015, you can only select Fall 2014, Winter 2015 or any future term.

Valid Until End of:	
Summer 2015	-

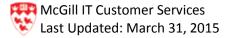
e. **Justification**: displays the current justification(s). To update, click on the search icon and check/uncheck the correct justification(s) for this course equivalency.

Decision:			Valid Until End of:		1	Public C	Comments:	
Equivalent ()	Not	Equivalent	Summer 2015	-		Review	wer 1 comments	
Justification(s):			Q					
Justification 1 Justification 2		Justification 3						
		Justification 4						
		Not enought details	in course description				Submit	💢 Cancel
		Testing justification	by adding a new justific	ation and u	use it to assess a	a		
Copyright © 201		request.					😽 McC	2:11
					[5-8	/ 11 1		
	*	2 / 3	> »		[3-0	/ 11]		

f. **Public Comments**: update the comments up to a maximum of 2000 characters. Keep in mind that the comments are visible to the public.

Public Comments:		
Reviewer 1 comments		
2000		

7. Click on the **Submit** button.



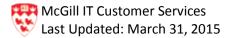
## **View List of Faculty Administrators**

- 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).

earch: <ul> <li>Name only</li> <li>Mo</li> </ul> SAOADMIN-Faculty of Science	re columns Address Book	nmavong@mci 👻 Advanced Find
Name	Title	Business Phone
SAOADMIN-Faculty of Scie SAOADMIN-Graduate Stud SAOADMIN-Ingram School SAOADMIN-Interfaculty B.J SAOADMIN-Post Graduate SAOADMIN-School of Con SAOADMIN-School of Con SAOADMIN-School of Phys SAOADMIN-School of Phys Sao-Mai Nguyen, Ms	ies of Nursing A. & Sc Dentistry Medicine tinuing Studies 5 & Occ Thera	
Sao-Retirees Macdonald Sapek Sapna Srivastava		T F
Cc ->		OK Cancel

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

AOADMIN-Faculty of Sc	ence		×
General Member Of	E-mail Addresses		
Display name: Alias name:	SAOADMIN-Faculty of Scien SAOADMINFacultyofScience	Members	*
Owner:	As Þ		
	•	< Ⅲ Modify Members	*
Add to Contacts	Actions		
		OK Cancel	Apply



## Request to Add or Remove a Faculty Administrator

In order to add or remove a user to manage a Faculty in the course equivalency system, you will need to contact one of the following users:

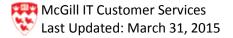
- Heidi Emami
- Clara Spadafora
- Roddica Vascan
- Saeed Farahdel
- John MacNeil
- Riyad Zienni

To add/remove a Faculty Administrator:

- 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).

elect Names: Global Address List		×
Search:      Name only      More colu	mns Address Book	
SAOADMIN-Faculty of Science	Go Global Address List - bounmy.tha	ammavong@mci 🔻 Advanced Find
Name	Title	Business Phone
SAOADMIN-Faculty of Science		
SAOADMIN-Graduate Studies		
SAOADMIN-Ingram School of Nur	sing	
SAOADMIN-Interfaculty B.A. & Sc		
SAOADMIN-Post Graduate Dentis	-	
SAOADMIN-Post Graduate Medici		
SAOADMIN-School of Continuing		
SAOADMIN-School of Phys & Occ		
SAOADMIN-Schulich School of Me Saoassignments Law	JSIC	
Sao-Mai Nguyen, Ms	Legal Counsel	
Sao-Retirees Macdonald	Legar counser	
Sapek		
Sapna Srivastava		-
- III		4
To ->		
Cc ->		
Bcc ->		
		OK Cancel

5. Double-click on the selected Faculty Group.



6. You will see the names of the people in the Faculty group. Click on the **Modify Members..** button.

SAOADMIN-Faculty	of Science	
General Member Of	E-mail Addresses	
Display name: Alias name:	SAOADMIN-Faculty of Scien SAOADMINFacultyofScience	Members           Mary Gauthier           Peter Barry
Owner:	As ►	
	·	Modify Members
Add to Contacts	Actio <u>n</u> s	
		OK Cancel Apply

- 7. Decide whether you want to add or remove a person.
  - a. To add:
    - i. Click on the **Add** button.

Contact Group Membership	X
Contact Group SAOADMIN-Faculty of Science	
Members Mary Gauthier Peter Barry	Add Remove Properties
ОК	Cancel

- ii. Search for the person's name and double-click on the name to add and click on the **OK** button
- iii. Click on the **OK** button again.



- b. To remove:
  - i. Click on the person's from the Members list.

Co	ontact Group Membership
	Contact Group
	SAOADMIN-Faculty of Science
	Members
	Joanne De Rose, Ms. Mary Gauthier Peter Barry Remove Properties
	OK Cancel

- ii. Click on the **Remove** button.
- iii. Click on the **OK** button.
- 8. Click on the **OK** button to complete the **Add** or **Remove** function.

