



## Course Equivalency System



# 1st 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 1<sup>st</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:

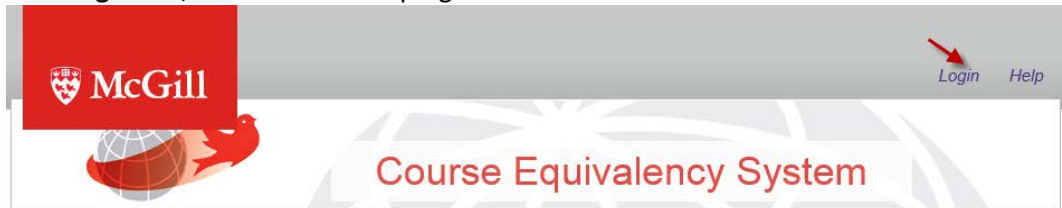
- There can be many 1<sup>st</sup> Reviewers and no 2<sup>nd</sup> Reviewer. This means the first person to assess the request will make the final decision.
- A person cannot be assigned 1<sup>st</sup> and 2<sup>nd</sup> Reviewer roles for the same subject. However, they can be assigned both roles for 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.

McGill University Authentication

Log in using your [McGill Username](#) (first.last@mail.mcgill.ca or first.last@mcgill.ca) and McGill Password.

Use of this service is governed by the Policy on the [Responsible Use of McGill Information Technology Resources](#).

**Login**

McGill Username:

McGill Password:

[Forgot Password?](#)

**Submit**

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

**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 [ITsupport@mcgill.ca](mailto:ITsupport@mcgill.ca) or by phone at 514-398-3398.



## Main Screen

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

The screenshot shows the main interface 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 provided. A search form is located below, with a red box highlighting it and a red arrow pointing to the 'Frequently Asked Questions' link. The search form has 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 for 'State/Province', and an input for 'Institution Name'; and 'Status' with checkboxes for 'Equivalent', 'Not Equivalent', and 'Include Expired Decisions'. 'Search' and 'Reset' buttons are at the bottom right of the form. A disclaimer at the bottom states that the information is a guideline and not student-specific.

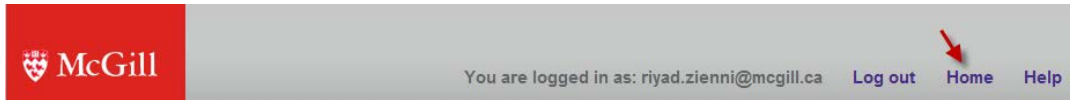
1. **Username:** displays your username and hover your mouse to see your role (e.g. System Administrator).
2. **Logout:** allows you to exit of the system.
3. **Home:** allows you to perform administrative tasks.
4. **Help:** it will bring you to a FAQ page.
5. **Search criteria:** allows you to search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



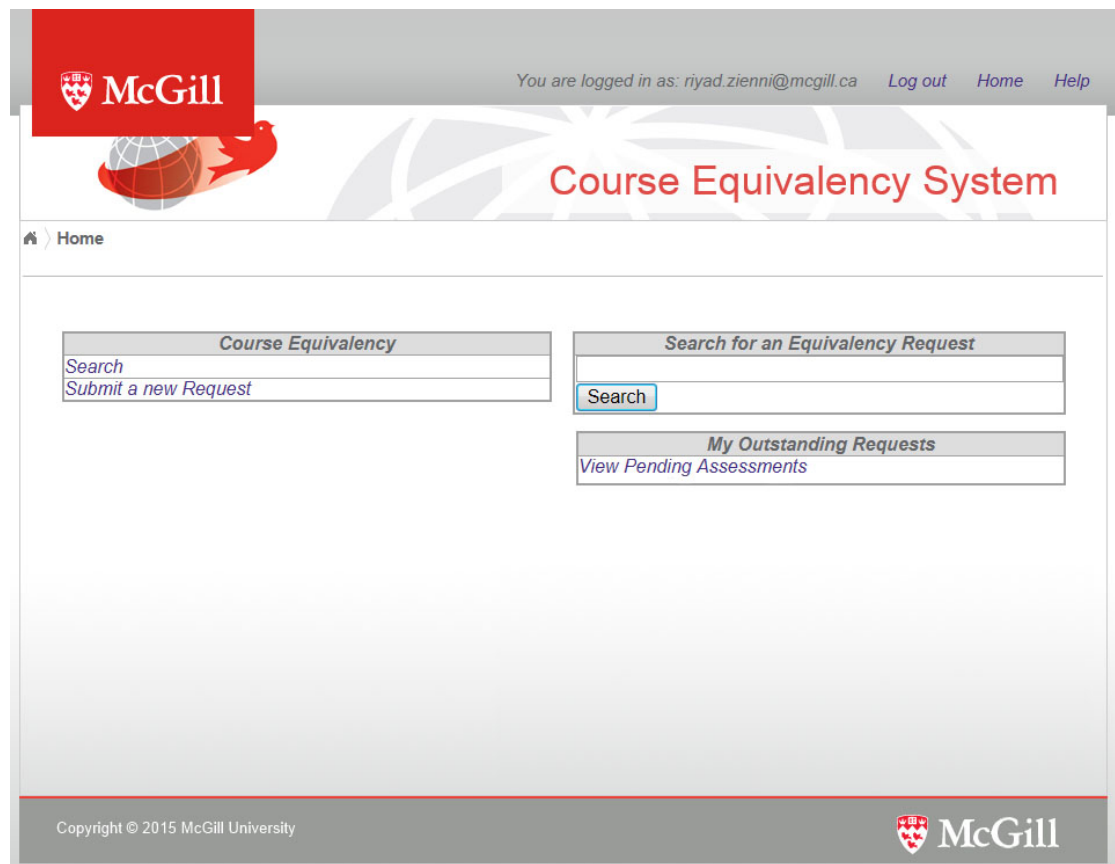
## Home menu

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 Assessments function is only for 1<sup>st</sup> Reviewer(s). It allows you to assess and make changes to the course equivalency request submitted by students.

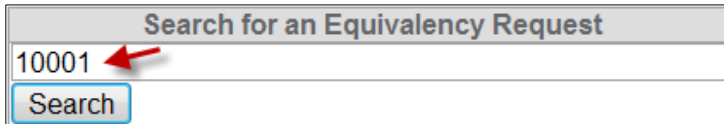


## Search for an Equivalency Request

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 search form titled "Search for an Equivalency Request". It features a text input field containing the number "10001", with a red arrow pointing to the text. Below the input field is a "Search" button.

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)				McGill University	
Course	Title	AU	Syllabus	Course	Title
ECO111	Economics	15.0	 View	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 a 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.



## My Outstanding Requests

After the student submits a course equivalency request, you will receive an email notification. This section is only for the 1<sup>st</sup> Reviewer(s) and will show you how to assess the request and make a decision. A request normally takes between 5-7 business days to complete.

Keep in mind that there could be many 1<sup>st</sup> Reviewer assigned to a subject. This means the decision made by the first person who clicks on the '**Submit**' is the final decision carried forward to the next step (saved in the database or sent to the 2<sup>nd</sup> Reviewer). A decision is marked as '**Final**' if there is no 2<sup>nd</sup> Reviewer and it is marked as '**Preliminary\_Decision**' when a 2<sup>nd</sup> Reviewer is assigned to the same subject.

The system will not inform you whether there is a 2<sup>nd</sup> Reviewer after you submit the decision; you can check the request status by looking up the request number or you can ask your Faculty Administrator if there is a 2<sup>nd</sup> Reviewer for that subject. If there is a 2<sup>nd</sup> Reviewer also assigned for the same subject as the 1<sup>st</sup> Reviewer, the request will go to the 2<sup>nd</sup> Reviewer for a final decision. If there is no 2<sup>nd</sup> Reviewer assigned and it is needed, the Faculty Administrator will have to assign one.

### 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.



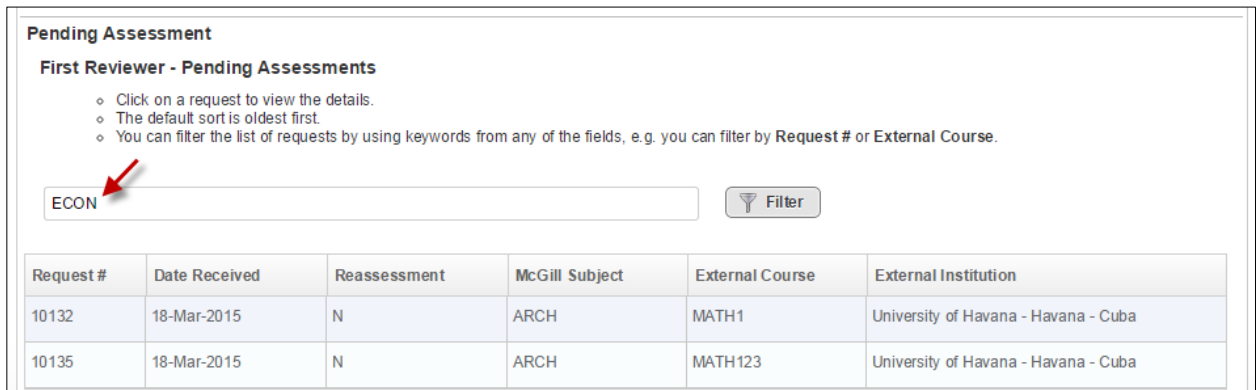
## View Pending Assessments

This function is only available for the 1<sup>st</sup> Reviewer(s).

1. Click **View Pending Assessments** 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.



**Pending Assessment**  
**First Reviewer - Pending Assessments**

- o Click on a request to view the details.
- o The default sort is oldest first.
- o 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**.

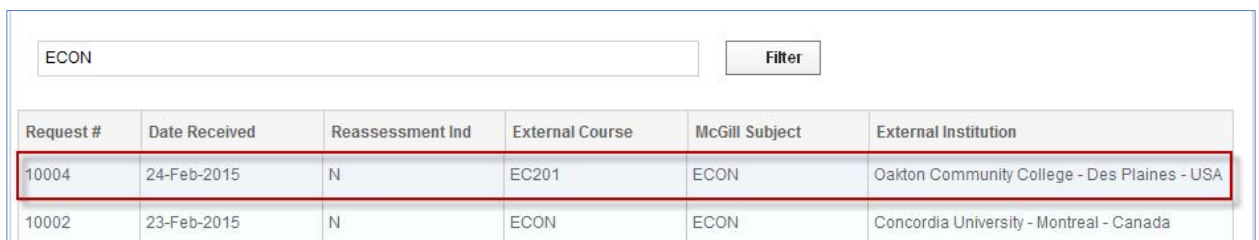
ECON

Request #	Date Received	Reassessment	McGill Subject	External Course	External Institution
10132	18-Mar-2015	N	ARCH	MATH1	University of Havana - Havana - Cuba
10135	18-Mar-2015	N	ARCH	MATH123	University of Havana - Havana - Cuba

### Tips

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.

3. Click on the request to see the details.



ECON

Request #	Date Received	Reassessment Ind	External Course	McGill Subject	External Institution
10004	24-Feb-2015	N	EC201	ECON	Oakton Community College - Des Plaines - USA
10002	23-Feb-2015	N	ECON	ECON	Concordia University - Montreal - Canada

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



Menu > Pending Assessment > Assess request

**Assess request**

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

Assess Incomplete Cancel

**a** Equivalency

Beijing Con Coll of Sino-Can (Beijing, China)				McGill University	
Course	Title	AU	Syllabus	Course	Title
ECON0001	World Economy		<a href="#">View</a>	ECON199	FYS: Aspects of Globalization.

Student Comments: test comments

**b** Related Equivalencies

No related equivalencies were found.

**c** Request Details

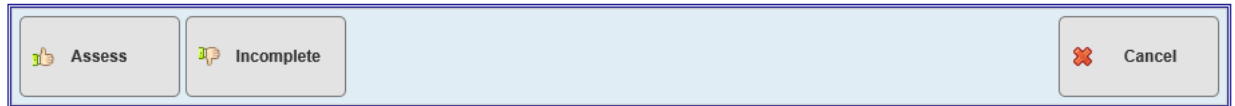
	Receipt Number	Requested Date	Requester Name	Email
>	10028	23-Feb-2015	Riyad Zienni	riyad.zienni@mcgill.ca

McGill

- Equivalency:** it displays 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 Student Comments. Click **View** to see the syllabus, if provided.
- 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.
- Request Details:** It shows you the snapshot of the original request: Receipt Number, Requested Date, Requestor Name, and Email.



- Decide whether you want to **Assess** this request or make it **Incomplete**.
  - Assess** means you want to process the request.
  - Incomplete** means that the request is missing document(s) or information is not useful in making a decision.
  - Cancel** brings you back to the previous page.



Go to the appropriate section below.

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## Assess

You are now ready to process the request.

- Click on the **Assess** button. You will see the Assess request page and will be able to make changes (e.g. fix typos) to the Equivalency section:
  - External course:** course number, title, and AU. Click **View** to see the syllabus, if provided.
  - McGill course:** course title and not the Subject.
  - 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:

- Click [+AddCourse](#)
- Enter the course number, title and AU
- Click **Upload** to include the syllabus, if required



Equivalency

Univ Leeds (Leeds, England, UK)

+AddCourse

Course *	Title *	AU	Syllabus
PSYC1614	Psychology at Leeds		View
			Upload

**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

**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.

2. Decide whether this request is equivalent or not equivalent.

Equivalent	Not Equivalent	Cancel
------------	----------------	--------



3. Whether you click on the **Equivalent** or **Not Equivalent** button, you will need to complete the following:
  - a. Decide the **Justification** by clicking to check the appropriate justification(s).
  - b. 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.
  - c. 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.

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





**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:**

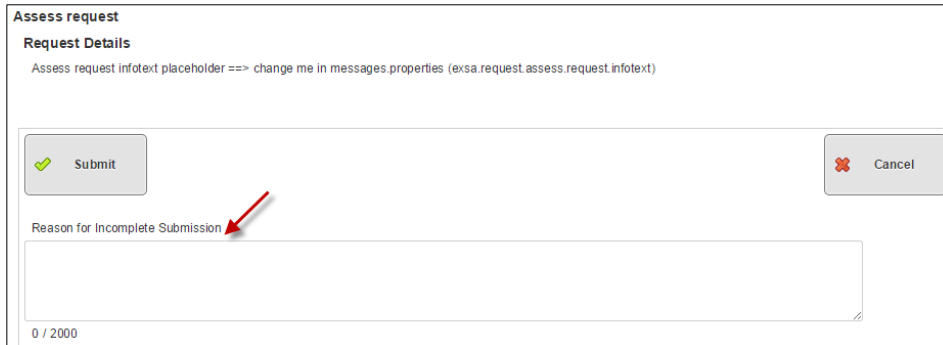
The system will allow you to add many courses to a requests to form an equivalency. However, the system will not allow you to establish an equivalency if a host course has an equivalency record in the database for the same subject.



## Incomplete

An action you would use when you have reviewed the request and there are missing documents or details.

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 form 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)". The form contains two buttons: "Submit" (with a green checkmark icon) and "Cancel" (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 form, there is a character count "0 / 2000".

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

### Note

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.

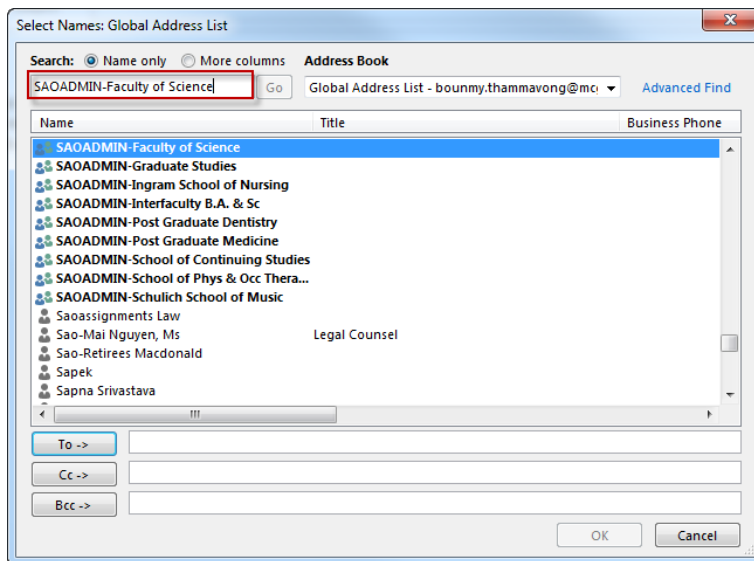


## View List of Faculty Administrators

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.

