# Introduction

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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 1stReviewer(s), or 1st and 2nd 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 1st 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 the all the functionality available to Faculty Administrators. The Faculty Administrator functionality allows you to perform one or more of the following:

1. Add/remove 1st and 2nd Reviewer(s) per McGill Subject
2. Enable/disable 1st or 2nd Reviewer(s)
3. Search for course equivalency requests by request number or requestor’s email address and view request details
4. View the list of Faculty Administrators
5. Request the addition/removal of a Faculty Administrator
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 1st or 2nd Reviewer. There could be one or two levels of reviewers in a department. Here are some examples:

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

4. Click on the Submit button.


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 or by phone at 514-398-3398.
Main Screen

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

1. **Username**: displays your username and hover your mouse to see your role (e.g. System Administrator).
2. **Logout**: allows you to exit the system.
3. **Menu**: 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 to the menu.

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

3. From the Menu, you will have 3 sections:
   a. **Course Equivalency**: It allows you to search for any McGill or External course(s).
   b. **Reviewers Administration**: This section 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.
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.

As the Faculty Administrator, you will have access to see all Departments within your Faculty. You will see the names of the 1st and 2nd Reviewers for each subject. If no reviewer(s) are assigned, you will get an email notification and you will need to assign a reviewer(s). This is where you can also change and/or delete reviewers.

### Manage Reviewers

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

<table>
<thead>
<tr>
<th>Faculty</th>
<th># of Subjects</th>
<th># of Subjects with no assigned Reviewers</th>
</tr>
</thead>
<tbody>
<tr>
<td>Faculty of Arts</td>
<td>51</td>
<td>50</td>
</tr>
</tbody>
</table>

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). You will need to assign them.

As a Faculty Administrator, you must have at least one 1st Reviewer per subject and assign a 2nd Reviewer (depending on your faculty) in addition to the 1st Reviewer.

3. Find the subject by filtering the column (Subject, Description, # of 1st Reviewers, # of 2nd Reviewers) or using the scrollbar at the bottom.
4. Click on the selected subject.

5. You will see a list of reviewers and their role. Note that the system displays the 1st Reviewers and then the 2nd 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.

      ![Search interface with 'Ryad' entered]

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

      ![Reviewer list interface with 'Ryad Zieni' highlighted]

      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.
   ![Role Modification Table]
   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.
   ![Delete Button]
   ii. You will see a Confirm reviewer deletion dialogue box. Click on the OK button to continue. A confirmation message will appear in green.

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If you don’t want to delete or suspend access for a short term without removing the reviewer(s), you can uncheck their role and their name will remain on the list.

An individual can only assume a 1st Reviewer or 2nd Reviewer role for the same McGill Subject.
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]

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 12.
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 button.

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. 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 1st or 2nd Reviewer. If you see more than one ‘Final’ status, it means that a decision was modified by the Systems Administrator.
   c. **Preliminary decision**: a decision has been made by the 1st Reviewer and is waiting for the 2nd 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.
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).
5. Double-click on the selected Faculty Group. You will see the names of the people in the Faculty group.
In order to add or remove a Faculty Administrator from the Faculty Administrators List, you will need to submit a request to CEQADMIN@mcgill.ca with the users’ email address and indicate what action is required.