Online Reference

Training Guide

For Graduate Program Administrators

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Online Reference Form Process

This document describes the overall process for the Online Reference Form. This includes:
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- Upload Reference Form on Behalf of Referee
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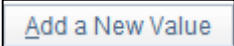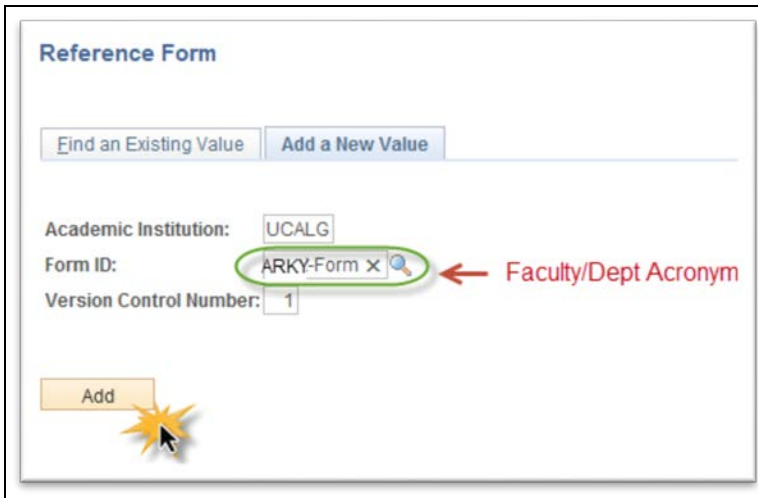

Step 1.   Copy Template and Modify the Reference Form

This will explain how a graduate department can use the reference form template (FGS-TEMP) for their online reference settings. .

1.   Click the **Set Up SACR** link.

   Set Up SACR

2.   Click the **Product Related** link.

   Product Related

3.   Click the **Recruiting and Admissions** link.

   Recruiting and Admissions

4.   Click the **U of C Web Application Set Up** link.

   U of C Web Application Set Up

5.   Click the **Reference Form** link.

   Reference Form

6.   To create the graduate program form, click the **Add a New Value** tab.

   Add a New Value

7.   **Form ID field** – This field is the program or department name (e.g. ARKY-FORM). This field can be up to ten characters.
   Version control number – Defaults to 1. It can be changed (e.g. 2) if creating another reference form; then the previous version (e.g. 1) can be copied into version 2.

Note: If you need to update your form, you can keep the same name (ARKY-Form) and just change the version number (e.g. if the current is version 1, you'll create version 2).
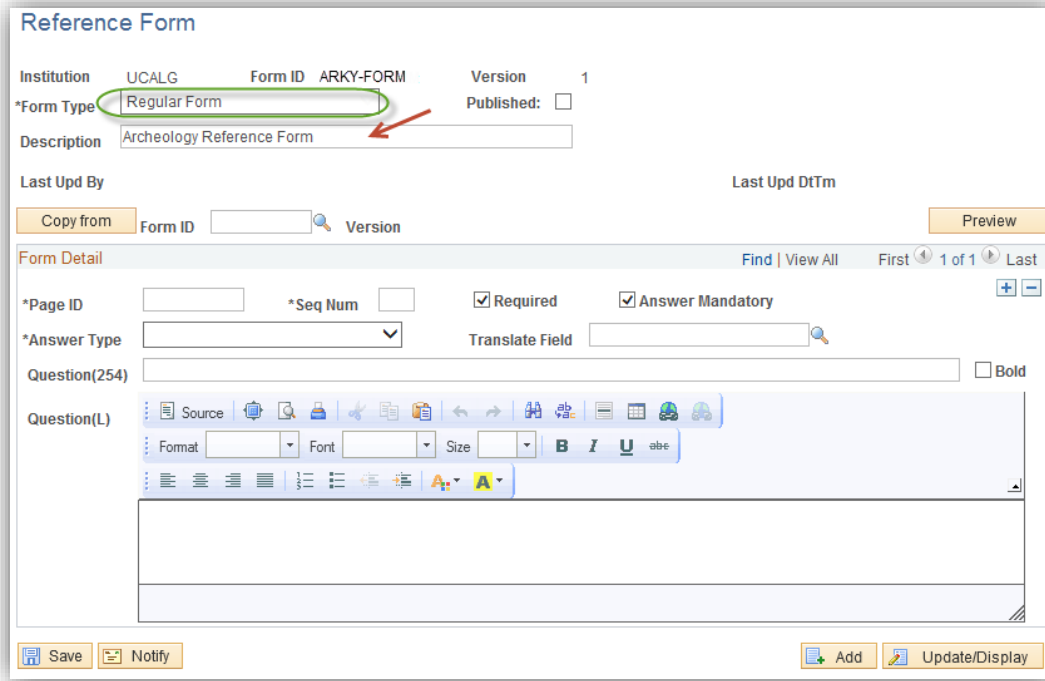
8. **Form Type** - This is where the form detail can be entered. The Form Type will be defaulted to Regular Form.

    Please enter a description of the reference (e.g. Archeology Reference Form). This description will not display on the online reference form, it is for internal viewing purposes only.
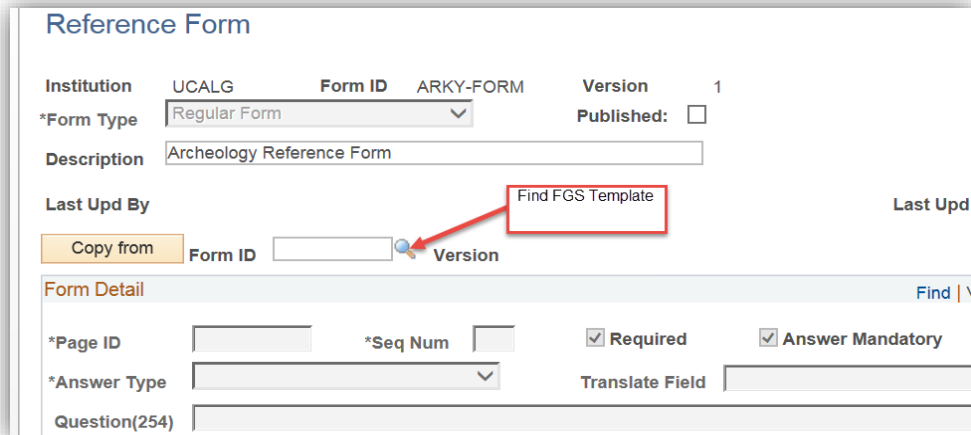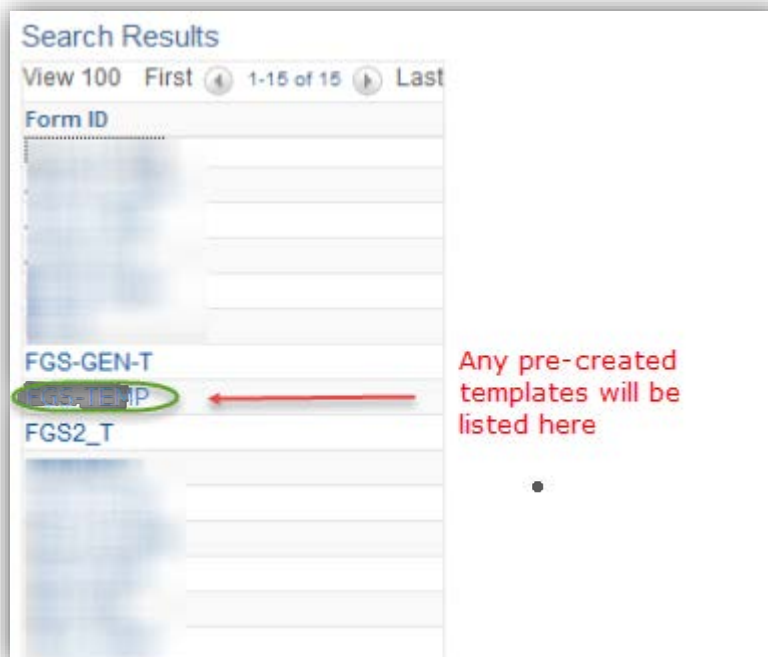
9. The next step will be to copy the Faculty of Graduate Studies template (e.g. FGS-TEMP) to this reference form area. Select the applicable FGS template from the Form ID field.

   Click the **Look up Form ID** button and find the FGS template.

10. Any pre-created FGS templates will display. **FGS-TEMP** is the current on-line reference FGS reference form template. ***The text of these questions cannot be edited.***
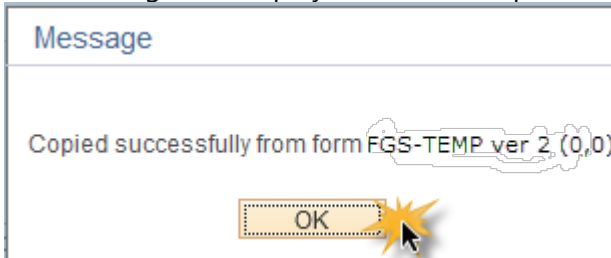

   Click the **FGS-TEMP** link.
   FGS-TEMP

11.   The form fields from the **FGS-TEMP** template must be copied to this reference form.
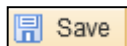
Click the **Copy from** button.

Copy from
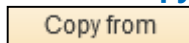
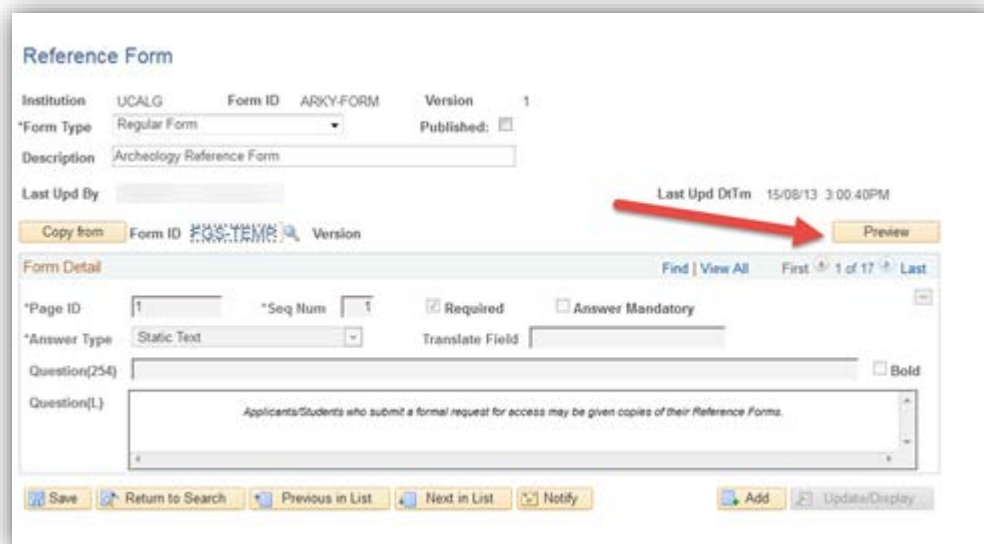12.   This message will display when the template has been copied.

Message

Copied successfully from form FGS-TEMP ver 2 (0,0)

OK

Click the **OK** button.

OK

13.   Click the **Save** button.

Save

14.   **Tip:** After saving, click on **Preview** to see how the referee will see these questions. The preview is for viewing only allowing you to see the options on the drop down fields.

15. The system will automatically open a new tab for preview, remember to come back to the first tab (Reference Form) to keep working on your form.
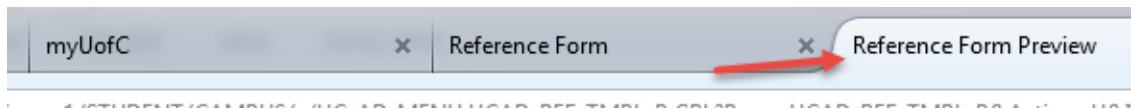
16. This is an example of the Reference Form Preview:

17. On the Reference Form window, the copied template (FGS-TEMP) contains 17 lines of information already setup. To view all 17 lines, click the View All link to display them at once. After reviewing the questions, it will be important to indicate "Published" when the department is satisfied with the questions.

Note: Departments will only be able to delete rows if not marked as required. ***The text of these questions cannot be edited.***

Click the **View All** link.

View All

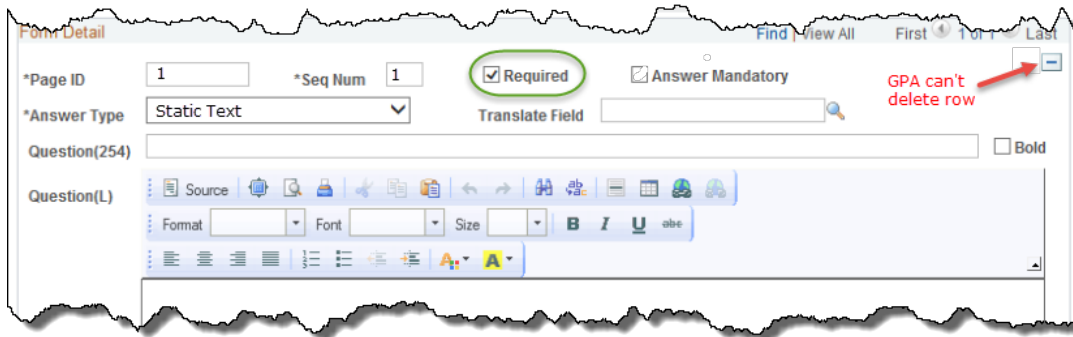***Congratulations! You have created your form. A few more steps and you'll be done.***

INFORMATION: The Following steps are merely informative to show you how the questions added behave (e.g. drop down menu, radio buttons, and long text). <u>You may skip them</u> to continue on to Publish and save the form.

Definitions:

18. **Page ID and Seq Num (sequence number)** refer to where this will appear on the form e.g. page 1 question 1. This is visible in Preview after saving.
     Required Field: If the Required box is checked this question cannot be deleted by the graduate program.
     Answer Mandatory indicates the **referee must answer** this question otherwise they will not be able to submit the form. Departments have the option to make the question mandatory or not.

Examples Using Required and Mandatory:

1. If the question is marked as **Required** in the template the row cannot be removed by the graduate program when creating their form. Each question marked as required will be present.
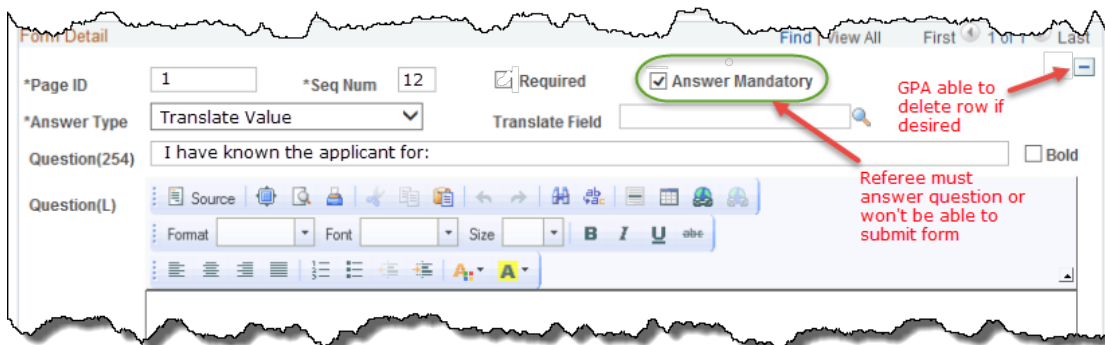
2. If answer is **Not Required**, but **Answer Mandatory** then the graduate program can delete this question but if the graduate program chooses to use it, the referee must provide an answer.
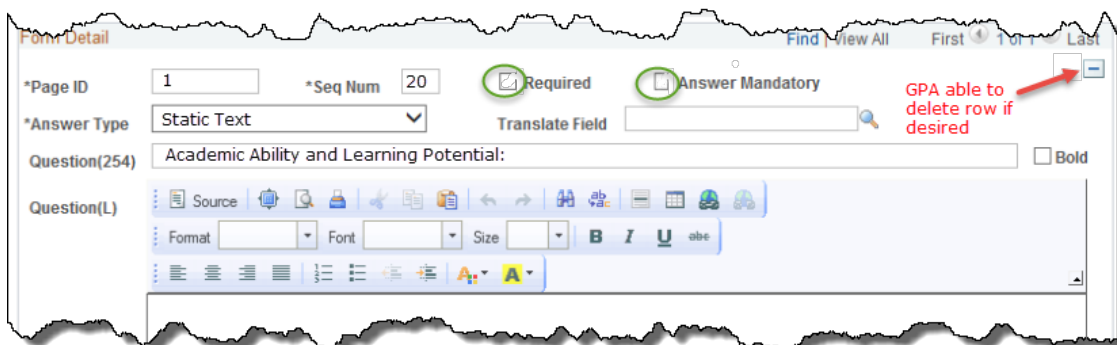
3. If question is not **Answer Mandatory** the referee will be able to submit the form without needing to answer the question
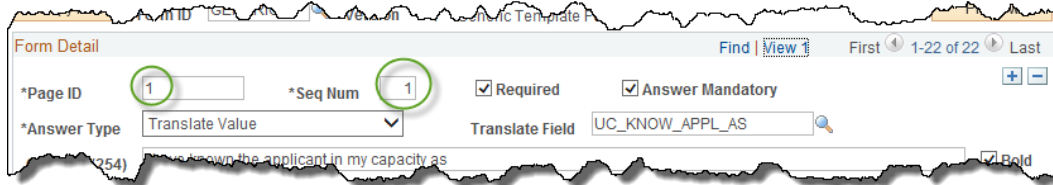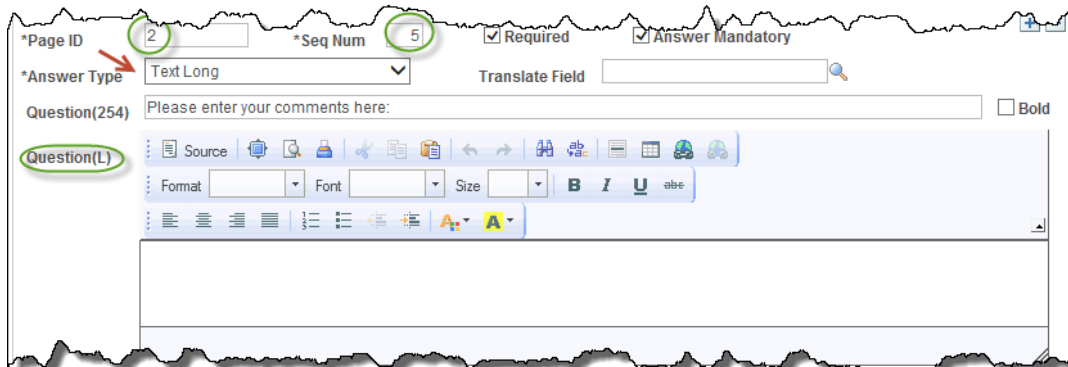
Answer type refers to a specific value (please refer to the job aid *Translate Table Definitions for Online Reference Form* to understand the translate table definitions).

19. When you scroll further down the page you will see Page ID = 2 (this question will be on page 2 of the reference form) and Seq Num = 5 indicating a new answer format from the previous sequence. Note that **Question (L)** indicates the Answer Type (Text Long) can be very long (> 2 pages).
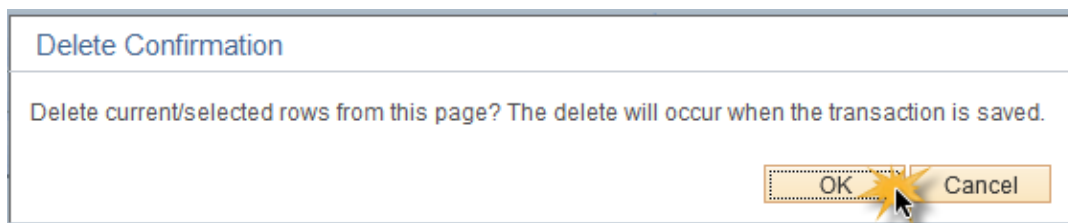

20. If a department has determined a question is not necessary for their referees to answer it can be deleted from the reference form provided it is not marked **Required**.
Click the **Delete row** button.

Note: Make sure you have saved first to be able to preview the latest update completed on the form.

21. The Delete Confirmation displays. Click the **OK** button.

Delete Confirmation

Delete current/selected rows from this page? The delete will occur when the transaction is saved.

OK   Cancel

22.   Preview the reference form to view what the referee will see on the reference form.
        Click the **Preview** button. **Tip:** Press **Save** first to view the recent changes on the
        form.
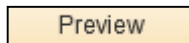
        Preview

23.   Click the **Save** button.
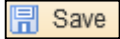
        Save

24.   **Examples Using Drop Down Menu:**

        In Reference Form Preview, there is a prompt for the referee to save the reference
        form often so data is not lost. The first question refers to the first sequence
        item listed in the form detail (page 1 question 1). To view the information on the
        drop down menus click on the drop down arrow.

        Click the **Drop Down** list.

        ⌄

25.   The first question listed; "I have known the applicant in my capacity as" requires the
        specific responses linked to the fieldnames from the translation table (please refer to
        the job aid "Translate Table for Online Reference Form" to understand the definition).
        Eg: UC_KNOWN_APPL_AS has these corresponding options setup.

        a. Instructor
        b. Supervisor
        c. Advisor
        d. Employer
        e. Other
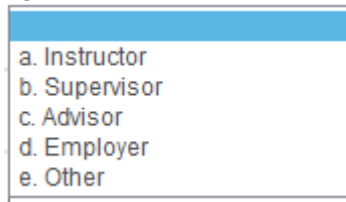
26.   Additionally, for the second question; "I have known the applicant for" options
        displayed are also setup in the Translation Table (e.g. UC_HOW_LNG_KNW APPL)

        a. Less than 1 year
        b. 1 - 3 years
        c. 3 - 5 years
        d. More than 5 years

27.   The options for "Please evaluate the applicant….peer group" refer to translate table code UC_GRD_SCALE_4_2. This relates to Background preparation.
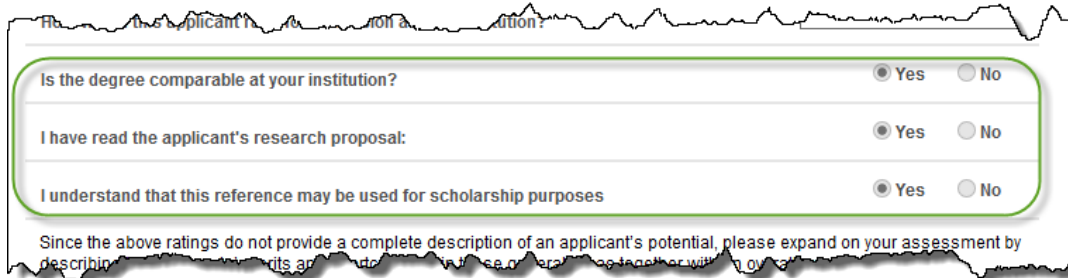

28.   **Examples Using Radio Buttons:**

Some of the template information may contain radio button answers (Yes/No).
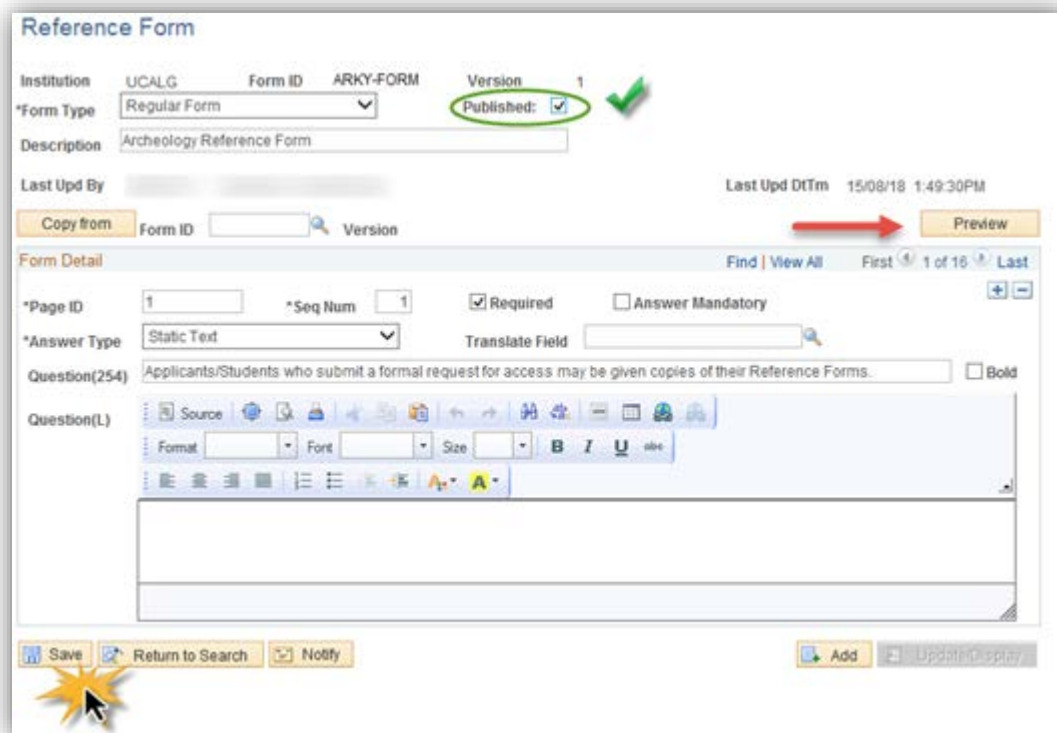
Publish Created Form:

When satisfied with the remaining form details (questions) click the **Published** checkbox, **Save** and **Preview** your final form.

Published enables the form to be visible when linking the form to the reference form ID in the next step.

Important: Once the form is Published and Saved, no further customizations can be completed. A new version must be created from the beginning of this process.
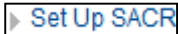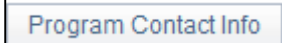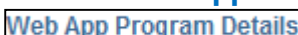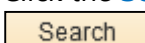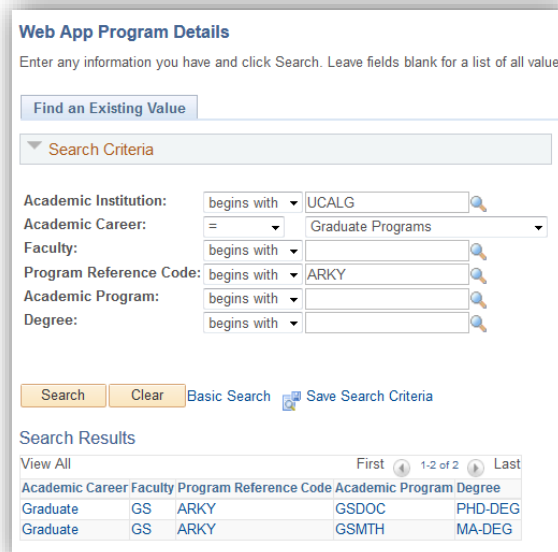
Click the **Published** option.

The form is now published and ready to be linked to your online settings. The next step will ensure your Program Contact information is current.

Updating Program Contact Information Tab:

All your contact information should be updated as the email the referees receive will contain the details from this page and it will be populated in the email signature they receive.

1.   Click the **Set Up SACR** link.
▸ Set Up SACR

2.   Click the **Program Contact Info** tab.
Program Contact Info

3.   Click the **Product Related** link.
Product Related

4.   Click the **Recruiting and Admissions** link.
Recruiting and Admissions

5.   Click the **U of C Web Application Set Up** link.
U of C Web Application Set Up

6.   Click the **Web App Program Details** link.
Web App Program Details

7.   Click the **Search** button.
Search [

8.   A grid of Web App Programs display. Select the specific Faculty or Department. For this example select your program (e.g. ARKY). Click the **ARKY** link.
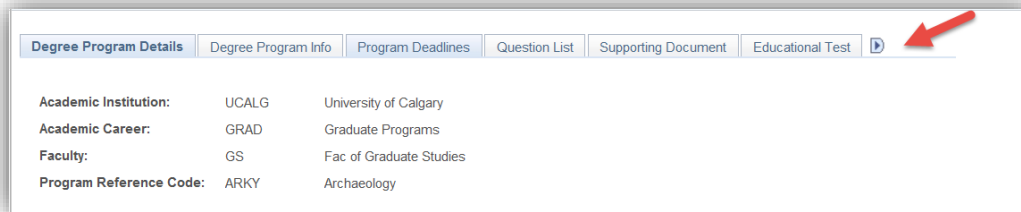
9.   From the Degree Program Details page, click the **Show following tabs** button.
▷
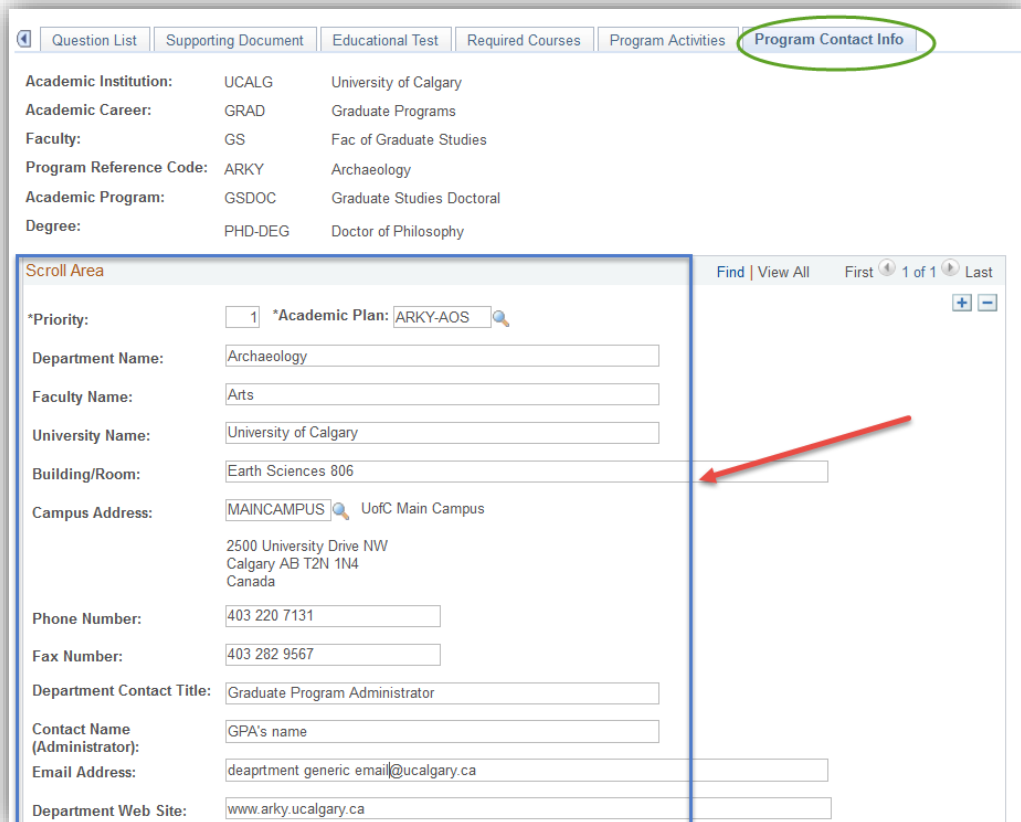
10.	Click on the **Program Contact Info** Tab. Update any necessary information and click **Save**.

Note: Remember to update each degree setting (e.g. PhD and MSc). The change will update overnight.

Email Notification using the online reference form

The following is an example of an email the referee will receive. The referee's email contains:

- ONE link to go online and complete "online reference form"
- Instructions for referees
- Department's contact information on the signature.

Reply   Reply All   Forward

@ucalgary.ca

Reference request from the University of Calgary for
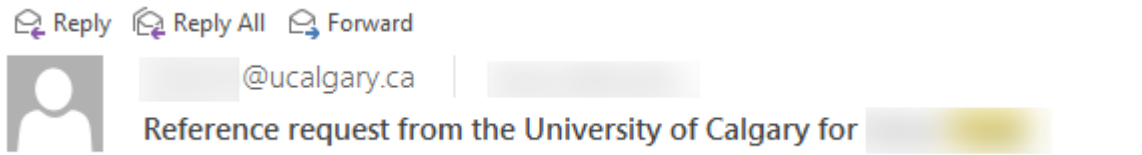
The above student is applying to the ***name of degree and program displays*** and has chosen you to provide a reference. We appreciate you taking the time to comment on this applicant's ability and potential and place high value on your assessment.

All information provided is confidential.

The deadline date for the uploading documents: ***(date may display)*** *(optional)*

In accordance with the Freedom of Information and Protection of Privacy act (FOIP), the student gives you, the referee, and consent to disclose personal information, such as attendance or performance to the University of Calgary. This information is required to evaluate the application for admission and for scholarship purposes. Please keep a copy of this e-mail as proof of consent in compliance with FOIP.

To access the on-line reference system, please use the following link (disable your pop-up blocker and close all internet browsers before clicking the link): https://saua.ucalgary.ca/psauthent/upload-reference/public ***(long url will display) include student's last name.***

Tips for filling out this form are available at: http://kb.ucalgary.ca/files/itkb/pdf-attachments/pa_referee_instructions_using_online_reference_form_jun15j.pdf.

Thank you in advance for assisting us in the evaluation process.

Sincerely,

Department Name

Earth Sciences 806, 2500 University Drive NW

Phone: 403 220 7131

Fax: 403 282 9567

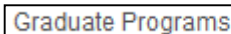Email: department email displays@ucalgary.ca

Linking the Published Reference Form to Online Settings

The final step of the process is to add the Online Reference Form in each degree setting in the Web Applications > Program Details page.
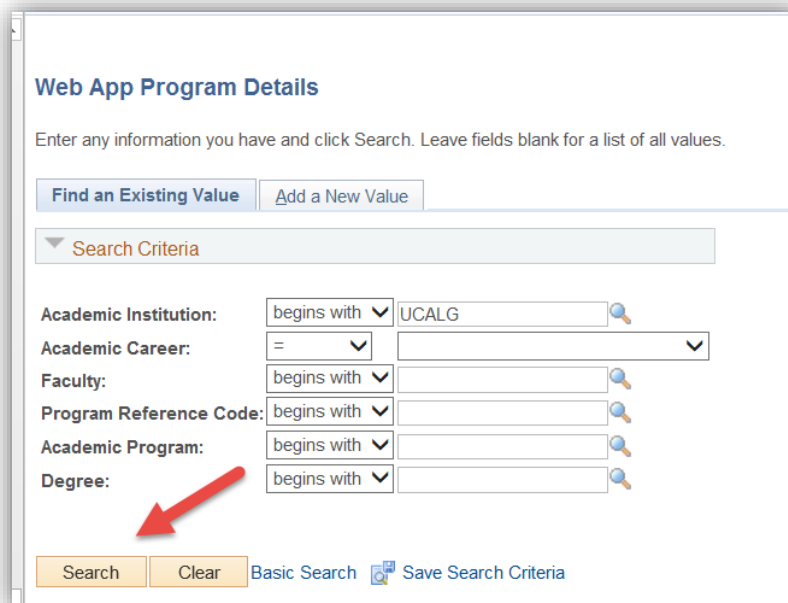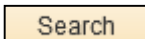
Linking the Published Reference Form:

1. Click the **Set Up SACR** link.

   ▶ Set Up SACR

2. Click the **Product Related** link.

   Product Related

3. Click the **Recruiting and Admissions** link.

   Recruiting and Admissions

4. Click the **U of C Web Application Set Up** link.

   U of C Web Application Set Up

5. Click the **Web App Program Details** link.

   Web App Program Details

6. Click the **Academic Career** list. Complete the Web App Program Details search criteria by selecting Academic Career (e.g. Graduate Programs).

   Click the **Graduate Programs** list item.

   Graduate Programs

7. Click the **Search** button.

   Search

8.   A grid of Web App Programs display. Select the specific Faculty or Department. For this example we have selected the program (e.g. ARKY). Click the **ARKY** link.

9.   Click the **Degree Program Info** tab.

10.   On the Degree Program Info tab you must indicate:

- **Number of Referees:** Graduate Programs can have up to 3 referees**.**
- **Reference Type**- **Using Online Reference template:** Must choose "Reference Form" The Reference Type must be changed to Reference Form and associated to the modified reference form. It is not necessary to remove the location of the Reference Form (URL) .PDF file as once the Reference form is linked this will be disabled.
- **Location of the reference form (URL)*** (applicable to .pdf template only). *****After saving the online reference form, this link will be disabled for future referees. ***You can overwrite the current URL in your website by uploading the online reference template in word.***
- **NOTE:** Referees that received .pdf form prior to your program using the online reference form, will be still able to find the URL link and to upload the .pdf template as they normally would do.

Online Reference Form:

11. To Link the Reference form to the Degree Program Info choose the **From Term** when the online reference will start being used (e.g. 2157). Complete the following fields:

Status- Active status always. (NOTE: Only one row is allowed active).
Form ID- Search for your created form (e.g. ARKY-Form). If you cannot find the created form ensure you have published the form.
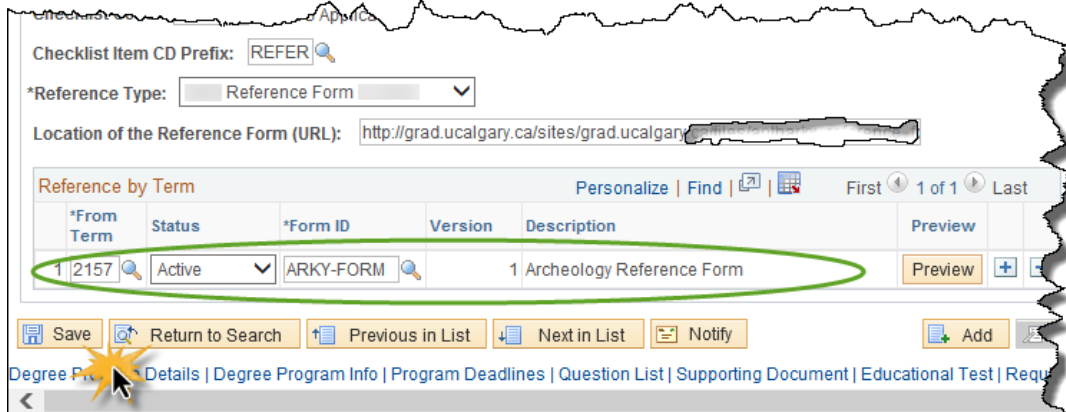**Version**- It will automatically display
Description- It will automatically display
Preview- See once more how the final form will look like.
Save- ***By saving it you are making the form live in production and at the same time the URL .pdf template gets disabled for future referees.***

12. **IMPORTANT:** Once you add the online reference form and save, the .pdf option will be automatically disabled and no longer available to referees; however, referees who have already received the .pdf form will have to email the form to the Faculty/department to manually upload.

13. If, in future, changes are made to the reference form, it will be necessary to create and publish a new form (version 2) and publish a new form.

    Repeat the first part of the process (modifying the FGS-TEMP reference template) then disabling the previous linked reference form and adding the updated/new reference form here with a new Term.

    Click the **Add a new row** button.

14. Click the **Status** list.
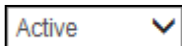
15. Inactivate the previous form (e.g. Archaeology Reference Form ARKY-FORM).

    Click the **Inactive** list item.
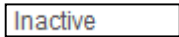
16. Enter the applicable Term. **IMPORTANT:** The same term cannot be listed twice regardless if one is inactive and the other is active. You must use a different term. Additionally you cannot have 2 forms active.

    Click the **Look up Form ID** button.
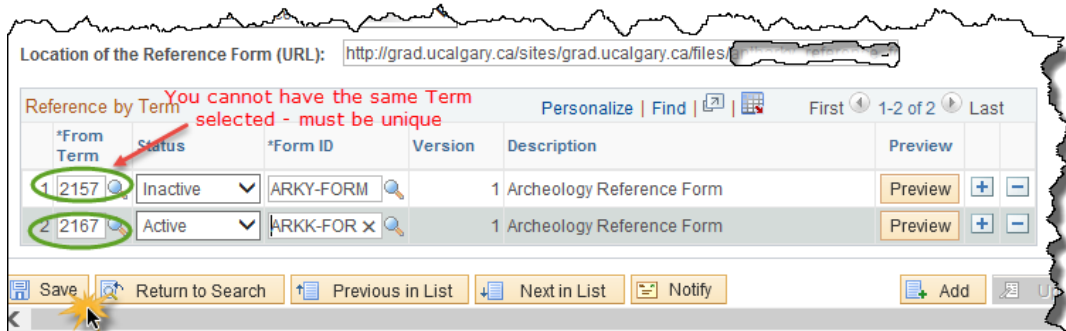
17. Select the new or updated reference form (e.g. ARKK-FORM).

    Click the **ARKK-FORM** link.

18.	Once you press save the change will occur overnight and the new form will be active and the previous form will be inactive. Referees that have received the form you are about to delete (version 1) will still be able to use the online reference system and to submit; and evaluators/GPAs to see as long as there is a form (version 1 or 2) linked/added in this section
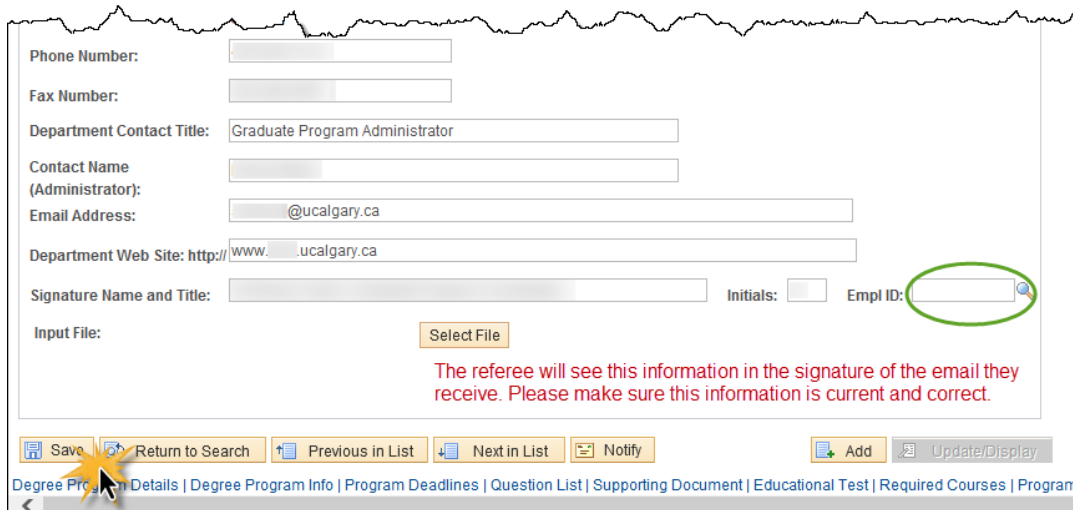
Click the **Save** button.

19.	The Program Director will be indicated in the Signature Name and Title area; however it will not appear on the email to the referee. If desired, include the Empl ID for the Program Director and this will enable them to view the referee comments. If the Empl ID is included here, it is not necessary to add them to the Evaluation Committee.

Once the entire process is complete save the updates. The process will complete overnight.

Click the **Save** button.
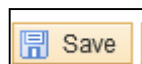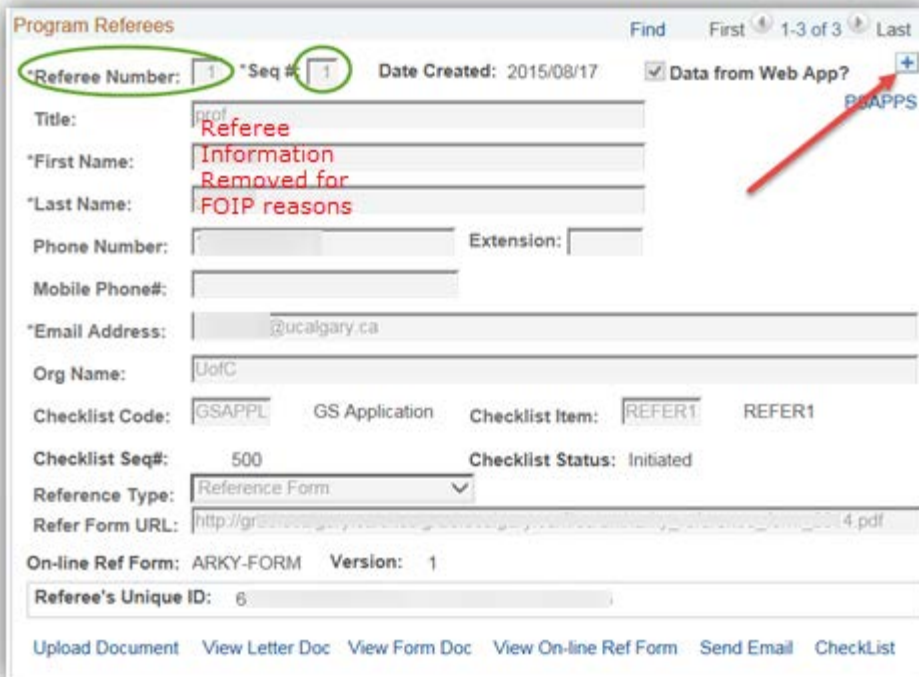
Update or Edit Online Referee

If there is a need to Update/Edit Current Online Referee Information follow these steps:

1. Click the **Student Admissions** link.

   ▷ Student Admissions

2. Click the **Application Evaluation** link.

   Application Evaluation

3. Click the **UofC Web Electronic Documents** link.

   UofC Web Electronic Documents

4. Click the **Web Electronic Documents** link.

   Web Electronic Documents

5. In the event the incorrect referee email address for referee #1 or #2 has been entered, it is necessary to add (+) another line under the appropriate referee #1 or #2 to input the new referee's information and send the referee links when saved.

   Example: Referee #1 had incorrect email address.
   On the **Program Referee** tab, click the "plus" sign and include the updated email address.

When updating an email address you will have to re-enter all the referee information (Tip: use copy and paste). **Note:** *The Seq# will now be 2.*
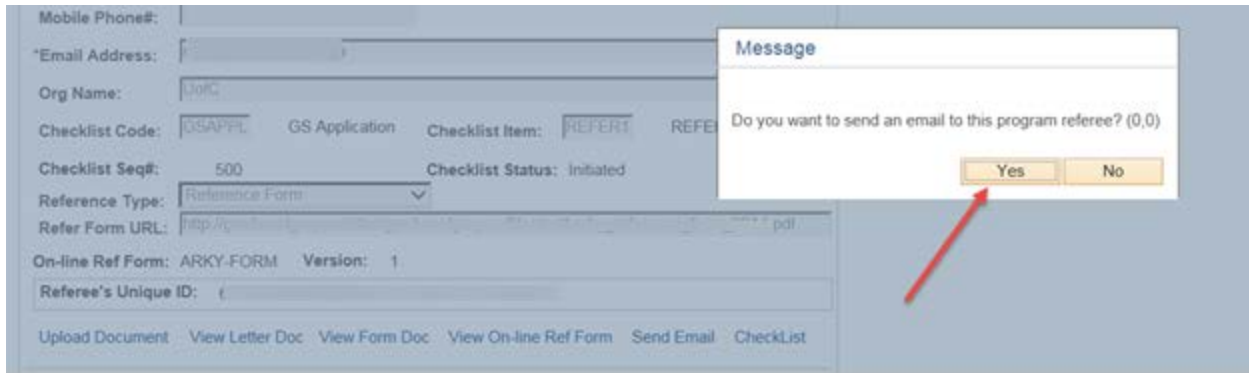
6. Click the Save button. Once save is pressed the email will be automatically sent. The original sequence entry (e.g. 1) will be waived automatically. **There is no need to update the checklist status.**

7. **Adding New Referee's Information:**
   In the event new referee information for referee #1 or #2, it is necessary to add (+) another line under the appropriate referee #1 or #2 to input the new referee's information.

Resend Email Notification to Referees

The system will automatically send email notification to referees, but if referee needs the email to be resent again, locate the referee and click send email buttom.

IMPORTANT: If email has never been automatically sent by the system to referees the message will show as: *Do you want to send an email to this program referee?...* You can continue, but If you see this message, **please contact the FGS Administrator immediately to have the automatic system checked out with IT.**

If the email is sent successfully the following message displays:

If the system has automatically sent the email and you are resending it, after you click send email, the message will show as:

This means the referee has received the email when applicant submitted online application.

GPA Uploading Reference Form Manually
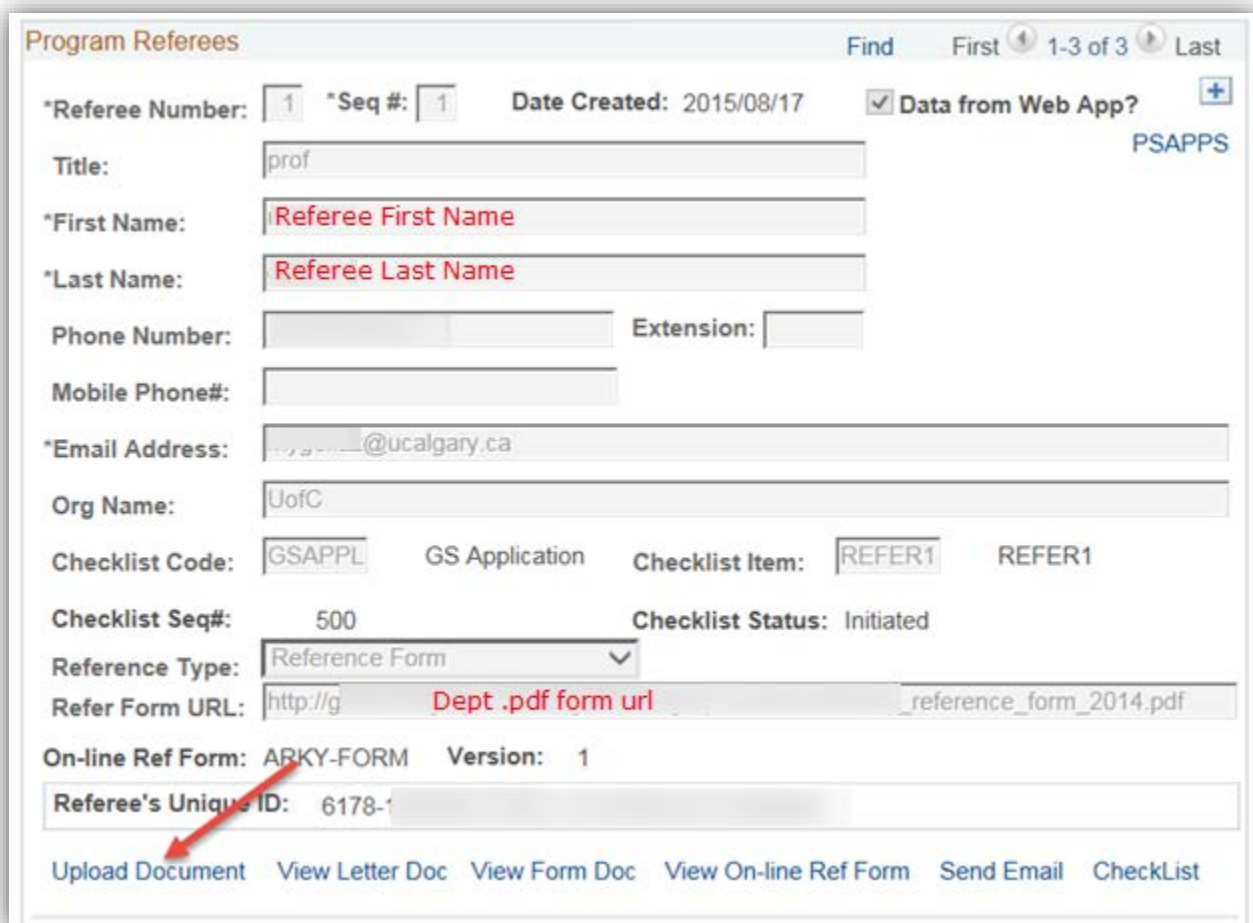
With the new online reference form, you'll still be able to upload form on behalf of the referee in case referee is having issues doing it online; or if they submitted the wrong file. GPA will need to send the reference form as an **attachment** by email to referee. The reference template is available in Sharepoint , *make sure you enter your faculty information on the header section of the template.*

Note: Uploading a document, when there is already a document uploaded, will cause the previous upload to be overwritten.

*IMPORTANT: The name of the file(s) CANNOT be longer than 30 characters, including spaces or symbols.

From the Program Referees Tab: Student Admissions > Application Evaluation > UofC Web Electronic Documents > Web Electronic Documents

You can upload the document using Upload Document:

The following Referee Attachment page displays allowing you to upload the document:

Browse to the reference form file and upload and save the file.

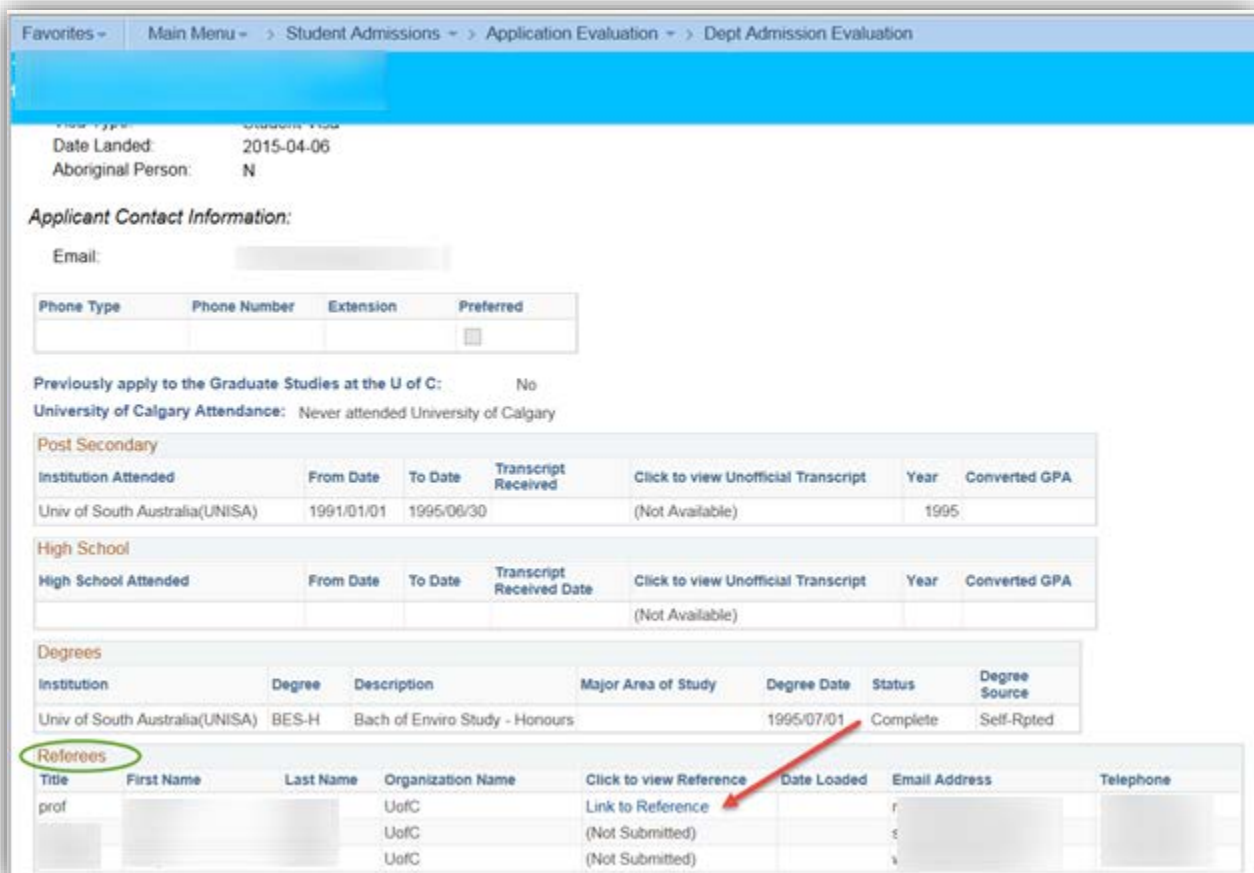Once the referee has completed the reference for the student they will receive an email confirmation and the student is also copied.

View Submitted Online Reference Form for Evaluators and GPA

All Evaluators and GPA's have the ability to view the online reference form once it has been uploaded.

Navigation: Student Administration > Application Evaluation > Dept Admission Evaluation

Once the evaluation has been uploaded, click the Link to View the Reference to display the evaluation:

The Graduate Program administrator can view the submitted online reference form by navigating to: Student Admissions > Application Evaluation > UofC Web Electronic Documents > Web Electronic Documents on the Program Referees Tab: