

This will explain how to use a Reference Form template for Faculty or department use. There are two steps to complete this process. The first step explains how to modify the reference form copied from the template and the second step explains how to link the modified reference form and update the programs default contact information.

Step One: Copy Template and Modify the Reference Form

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

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

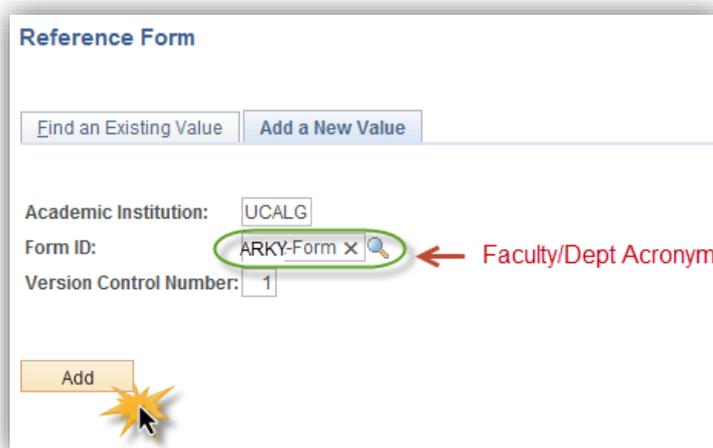
3. Click the **Recruiting and Admissions** link.

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

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

6. Click the **Add a New Value** tab.

7. The Form ID field must be populated with a ten character limit description (Faculty or department name e.g. ARKY-Form). 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. Click the **Add** button.

Reference Form

Find an Existing Value Add a New Value

Academic Institution: UCALG

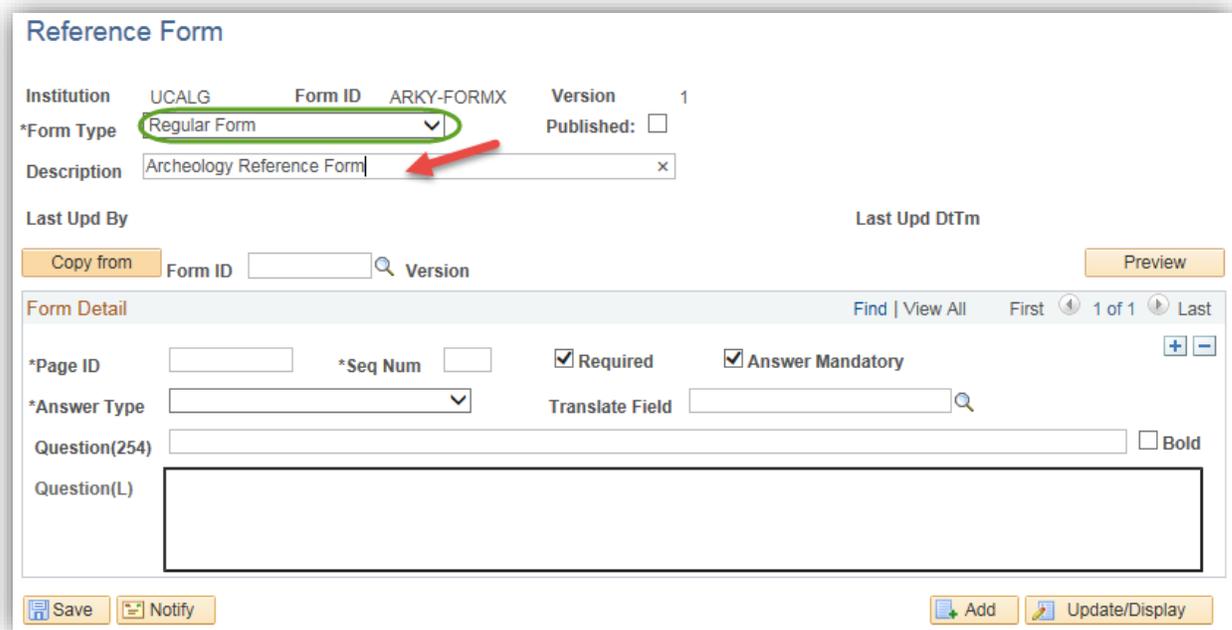
Form ID: ARKY-Form x Faculty/Dept Acronym

Version Control Number: 1

Add

When you create a new version of an existing form (e.g. 1), you must identify the version number when you "add" the form initially. If you try to add the form with a version number that already exists, it will not permit to add. It will populate the existing form and version number (e.g. 1). Once you create the new form ID with the new version number, follow the instructions to create the form; they are the same. When you link the form to the program information, the latest version of the form will always be used.

8. Reference Form is where the form details can be entered. The Form Type should be defaulted to **Regular Form**; otherwise select it. Please enter a description of the reference (e.g. Archeology Reference Form).

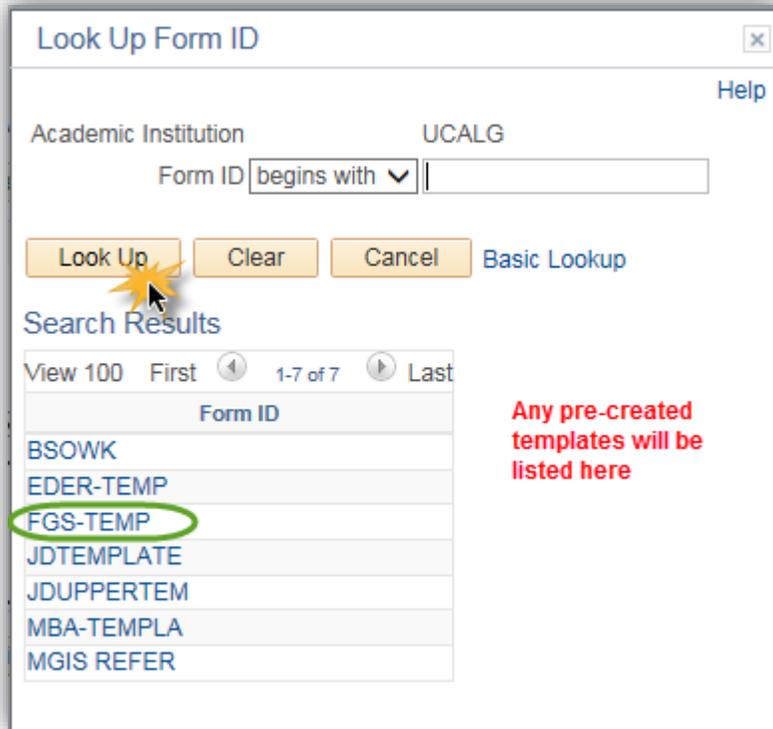


9. The next step will be to copy the Faculty of Graduate Studies template (e.g. FGS-TEMP) to this reference form area. Select the applicable FGS template from the Form ID.

Click the **Look up Form ID** button.



10. Any pre-created templates will be listed. Please select **FGS-TEMP** since this has been created by FGS and contains the most relative questions for Referees. Click the **FGS-TEMP** link.



Look Up Form ID

Academic Institution UCALG

Form ID begins with

Look Up Clear Cancel Basic Lookup

Search Results

View 100 First 1-7 of 7 Last

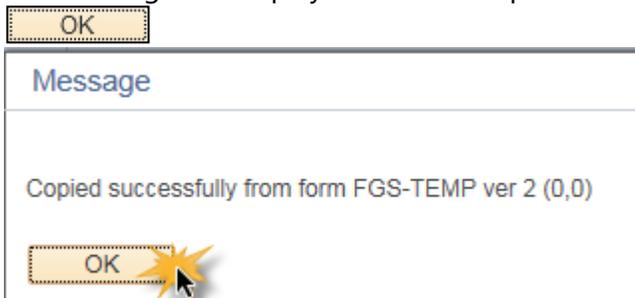
Form ID
BSOWK
EDER-TEMP
FGS-TEMP
JDTEMPLATE
JDUPPERTEM
MBA-TEMPLA
MGIS REFER

Any pre-created templates will be listed here

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. Click the **OK** button.



OK

Message

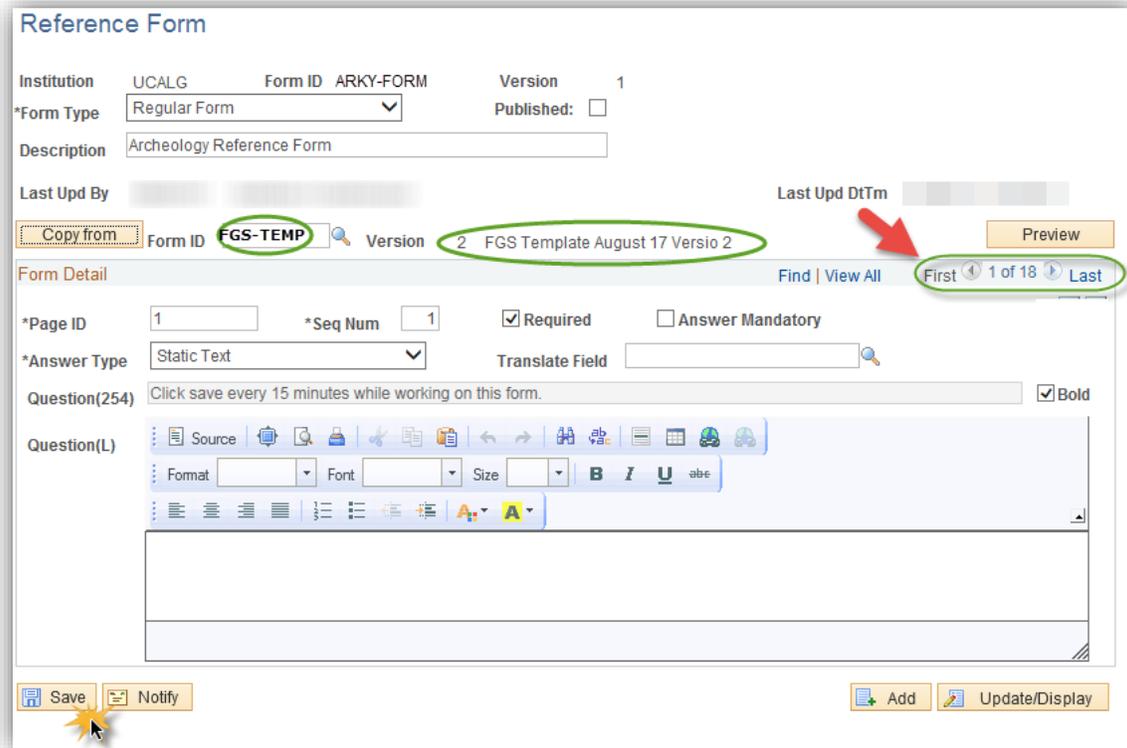
Copied successfully from form FGS-TEMP ver 2 (0,0)

OK

Online Reference Form

SA – Processing Applications

13. Note that 18 form fields (questions) have been copied to this Archaeology Reference Form. Click the **Save** button.



Reference Form

Institution UCALG Form ID ARKY-FORM Version 1

*Form Type Regular Form Published:

Description Archeology Reference Form

Last Upd By [redacted] Last Upd DtTm [redacted]

Copy from Form ID **FGS-TEMP** Version **2 FGS Template August 17 Versio 2** Preview

Form Detail Find | View All **First** 1 of 18 **Last**

*Page ID 1 *Seq Num 1 Required Answer Mandatory

*Answer Type Static Text Translate Field [redacted]

Question(254) Click save every 15 minutes while working on this form. Bold

Question(L) [Rich Text Editor]

Save Notify Add Update/Display

14. After saving, click on Preview to see how the referee will view these questions. Note that the Reference Form Preview opens a new window allowing you to navigate back to the form. The "Preview" is a "view only" function that will allow you to view the options in the drop down fields. Click the **Preview** button.



Reference Form Preview

Institution UCALG Form ID ARKY-FORMX Version 1 Archeology Reference Form

Click save every 15 minutes while working on this form.

This reference may be used for scholarship purposes.

Applicants/Students who submit a formal request for access may be given copies of their Reference Forms.

I have known the applicant in my capacity as:

Question 1 Sequence 1

If Other, please explain:

Sample short text answer

I have known the applicant for:

Please evaluate the applicant in the following areas:

Background preparation

Potential research ability

Intellectual ability

Capacity to work well with others

Work ethic

How would this applicant rank for admission at your institution?

Is the degree comparable at your institution?

Yes No N/A

I have read the applicant's research proposal:

Yes No N/A

Click save every 15 minutes while working on this form.

Since the above ratings do not provide a complete description of an applicant's potential, please expand on your assessment by describing the applicants' merits and shortcomings in these general areas together with an overall recommendation.

1. Academic background and training – applicant's general knowledge of the field, preparation in the field and additional skills or experience that might help them complete their degree.

2. Research ability and record - originality and ability to synthesize ideas, analytical thinking, skill at research design, quality of any research, familiarity with techniques or methodologies of the field, ability to discuss critically, ability to express ideas clearly.

3. Communication and language ability - applicant's communication ability as revealed in any role such as the presentation of reports or seminars, and speaking ability. If English is not the applicant's first language, some comment on his/her proficiency in English would be appreciated.

4. Reliability and Personal Aptitude - applicant's interpersonal skills and temperament for graduate work.

Please enter your comments here:

Sample long text answer

[Return to Search](#)

Online Reference Form

SA – Processing Applications



15. To continue working on your form click the Reference Form Tab in the browser. Click the **Reference Form** tab. **Tip:** You can navigate from each tab while working on the reference form.

[Reference Form](#)

16. On the Reference Form window, the copied template (FGS-TEMP) contains 18 lines of information already setup. To view all 18 lines concurrently, click the View All link. After processing through all questions it will be important to indicate **Published** when the Faculty or Dept is satisfied with the questions.

Note: Departments will only be able to delete questions that are not marked as required.

Click the **View All** link.

[View All](#)

17. Page ID and Seq Num (sequence number) refer to where this will appear on the form e.g. page 1 question 1. If the Required box is checked the question cannot be deleted by the graduate program. If the Answer Mandatory box is checked, this indicates the referee must answer the question, otherwise they will not be able to submit the form. Answer type refers to a specific value (please refer to the job aid Translate Table Definitions for Online Reference Form).

Reference Form

Institution UCALG Form ID ARKY-FORM2 Version 1
 Form Type Regular Form Published:
 Description
 Last Upd By Last Upd DtTm 18/04/20 2:04:51PM

Form ID FGS - Templ - Version 2

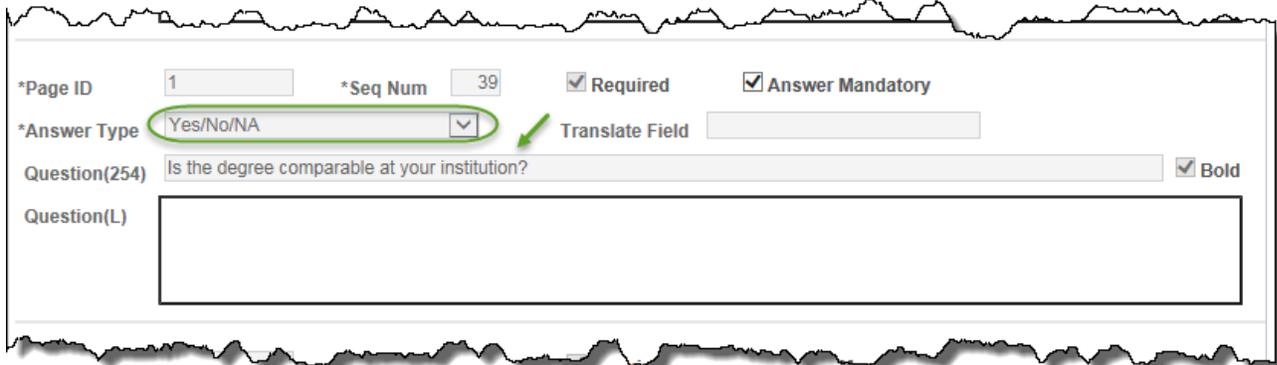
Form Detail Find | First 1-18 of 18 Last

*Page ID *Seq Num Required Answer Mandatory
 *Answer Type Translate Field
 Question(254) Bold
 Question(L)

*Page ID *Seq Num Required Answer Mandatory
 *Answer Type Translate Field
 Question(254) Bold
 Question(L)

*Page ID *Seq Num Required Answer Mandatory
 *Answer Type Translate Field
 Question(254) Bold
 Question(L)

18. Some questions have been setup with radio button Yes/No/NA responses.



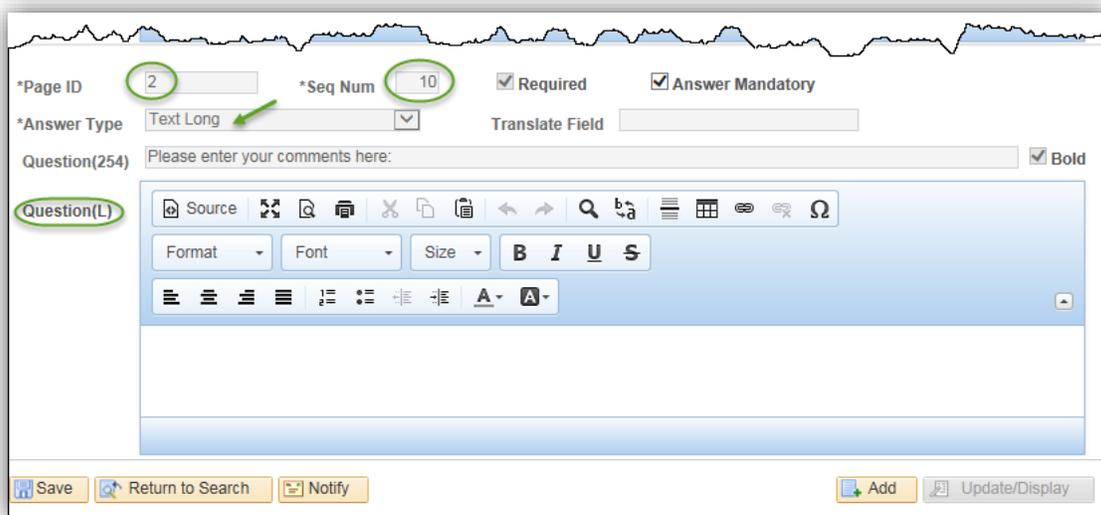
*Page ID *Seq Num Required Answer Mandatory

*Answer Type

Question(254) Bold

Question(L)

19. Scrolling further down Form detail displays 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 (visible in Preview after saving). Note that Question (L) indicates the Answer Type (Text Long) can be very long (> 2 pages).



*Page ID *Seq Num Required Answer Mandatory

*Answer Type

Question(254) Bold

Question(L)

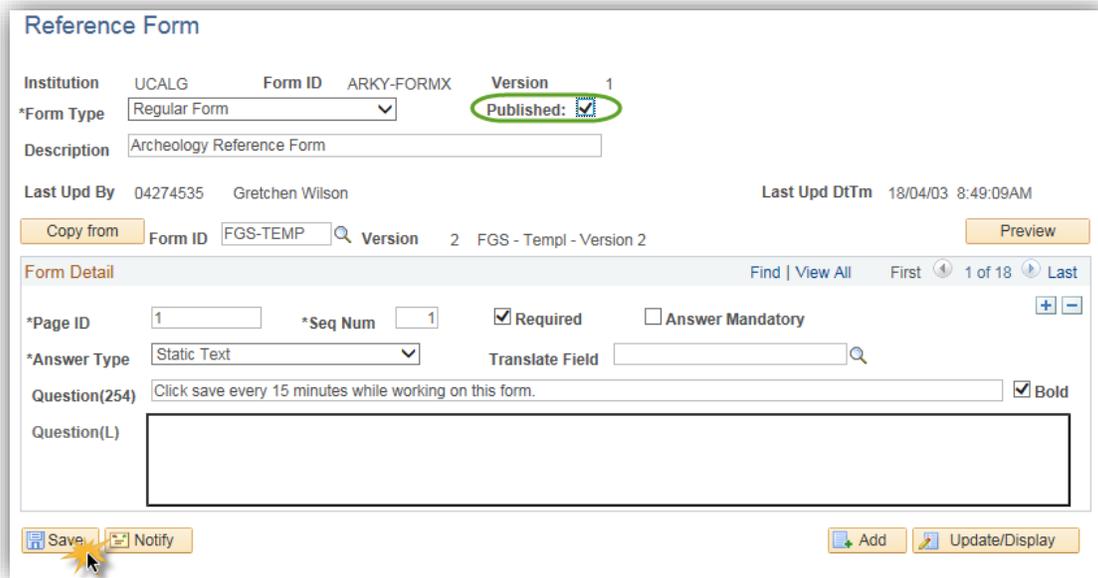
Rich text editor toolbar: Source, Undo, Redo, Bold, Italic, Underline, Strikethrough, Bulleted List, Numbered List, Indent, Outdent, Font Color, Background Color, Link, Unlink, Table, Table of Contents, Print, Help, Omega.

Buttons: Save, Return to Search, Notify, Add, Update/Display

20. When satisfied with the remaining form details (questions) click the Published checkbox. Published enables the form to be visible when linking the form to the reference form ID in the next step. Click the **Published** option.

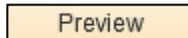
Important: Once the form is Published and Saved, no further customizations can be completed. A new version must be created from the beginning of this process.

Click the **Save** button.

The screenshot shows the 'Reference Form' configuration page. At the top, it displays 'Institution: UCALG', 'Form ID: ARKY-FORMX', and 'Version: 1'. The '*Form Type' is set to 'Regular Form'. A green circle highlights the 'Published: checkbox. Below this, the 'Description' is 'Archeology Reference Form'. The 'Last Upd By' is '04274535 Gretchen Wilson' and the 'Last Upd DtTm' is '18/04/03 8:49:09AM'. There is a 'Copy from' section with 'Form ID: FGS-TEMP' and 'Version: 2 FGS - Temp1 - Version 2'. The 'Form Detail' section includes fields for '*Page ID' (1), '*Seq Num' (1), and checkboxes for 'Required' (checked) and 'Answer Mandatory' (unchecked). The '*Answer Type' is 'Static Text'. The 'Question(254)' field contains the text 'Click save every 15 minutes while working on this form.' with a 'Bold' checkbox checked. At the bottom, there are buttons for 'Save', 'Notify', 'Add', and 'Update/Display'. A mouse cursor is pointing at the 'Save' button.

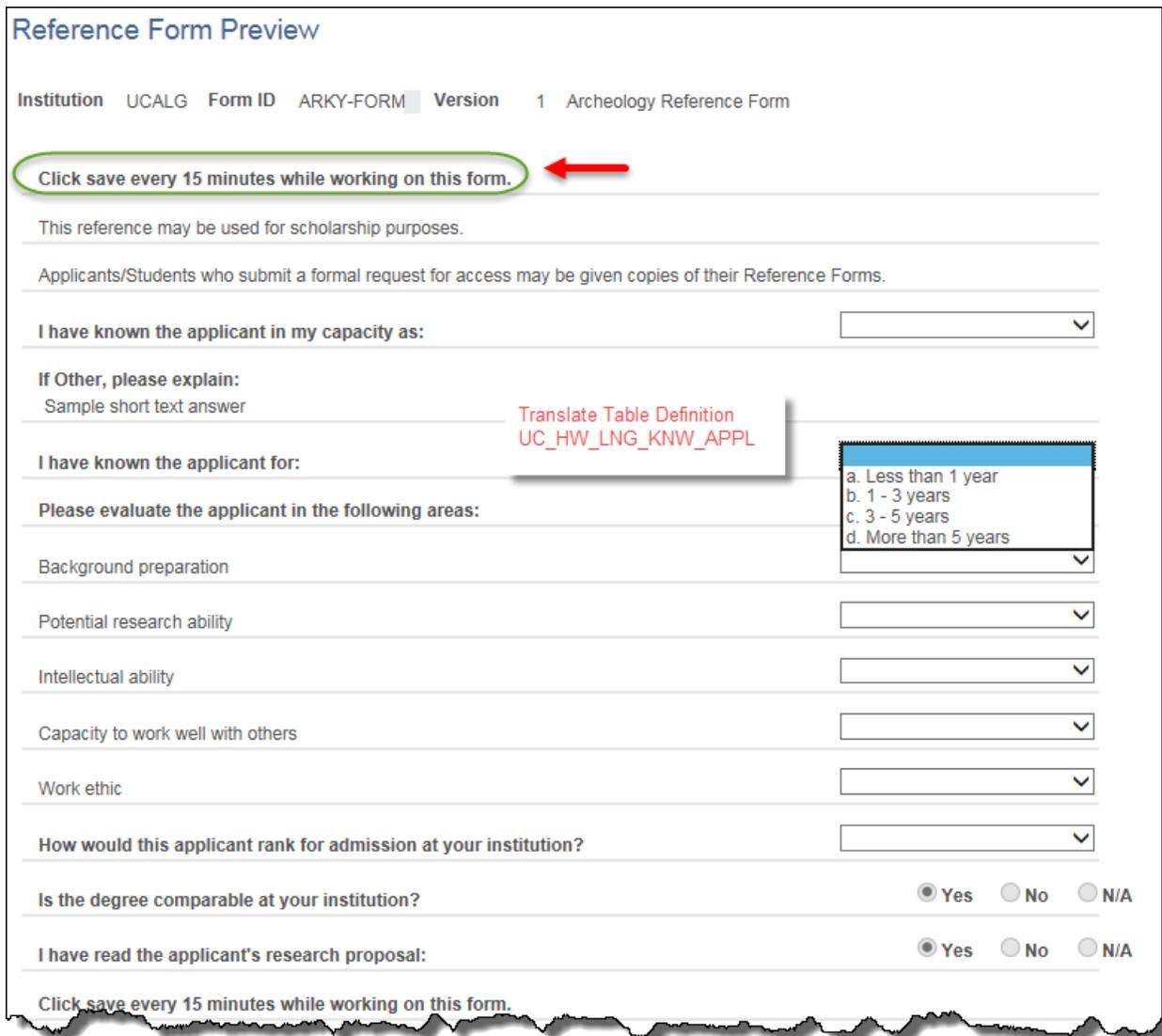
21. Preview the reference form to view what the referee will see on the reference form. Click the **Preview** button. **Tip:** Press Save first to view the recent changes on the form.



Online Reference Form

SA – Processing Applications

22. 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.



23. The drop down options for the question; "I have known the applicant for" are setup in the Translation Table (e.g. UC_HOW_LNG_KNW APPL). Please refer to the job aid: *Translate Table for Online Reference Form*.

24. The next series of responses related to "Please evaluate the applicant in the following areas:" use the same translate table definition. The translate table definition UC_GRD_SCALE_4.2 was used for the next 5 responses. Click the **Drop down** list.



25. Some of the template information may contain radio button answers (Yes/No/N/A).

26. Some fields in the reference form may also contain "Text Long" responses. The answer to questions using this answer type can be very long, over 2 pages. Faculties/Depts can process and customize through the reference form.

Remember to save the changes then click on Preview to view the reference form and the process of the customization. Once the graduate program has indicated their desired questions and no further changes are required, return to the form.

27. **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.

Step Two: Linking the Published Reference Form and Updating Program Details: The second part of the process is to add the Online Reference Form in each degree setting in the Web Applications > Program Details page as well as update the contact information TAB.

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 your Graduate Program Form that you have just created (e.g. ARKY). Click the **ARKY** link.

[ARKY](#)

Web App Program Details

Enter any information you have and click Search. Leave fields blank for a list of all values.

▼ Search Criteria

Academic Institution: begins with ▼ UCALG 
Academic Career: = ▼ Graduate Programs ▼  
Faculty: begins with ▼ 
Program Reference Code: begins with ▼ 
Academic Program: begins with ▼ 
Degree: begins with ▼ 

[Basic Search](#)  [Save Search Criteria](#)

Search Results

View All First ◀ 1-100 of 208 ▶ Last

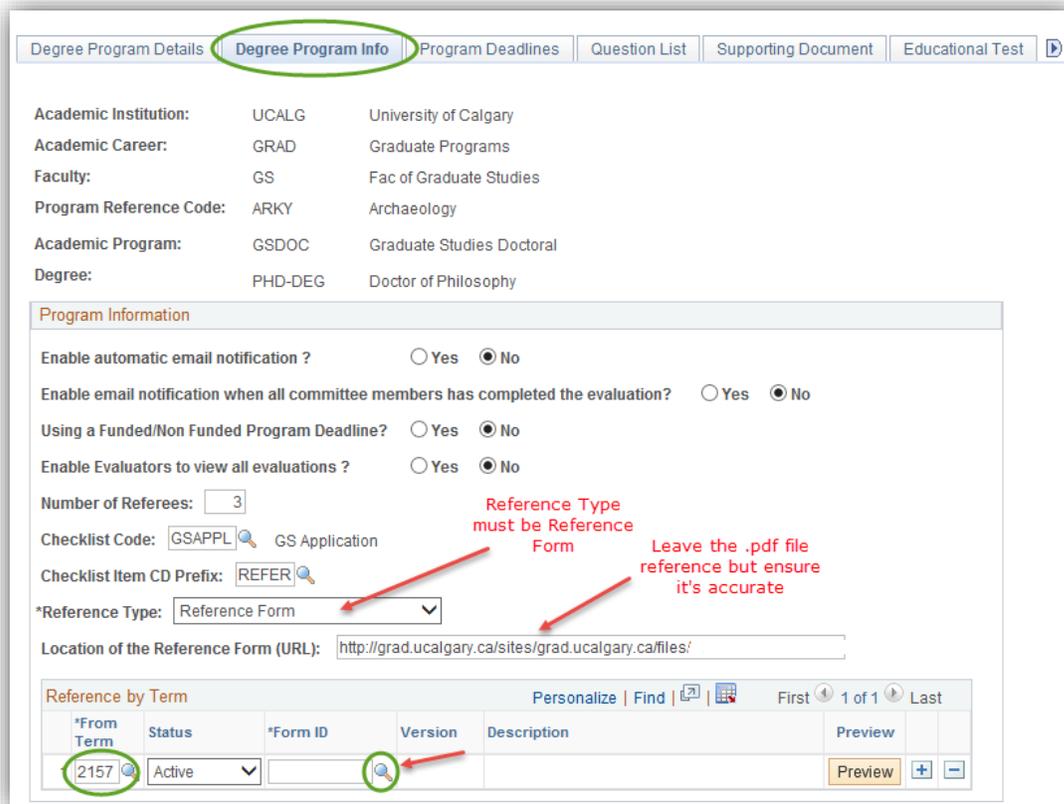
Academic Career	Faculty	Program Reference Code	Academic Program	Degree
Graduate	GS	ANTH	GSDOC	PHD-DEG
Graduate	GS	ANTH	GSMTH	MA-DEG
Graduate	GS	ARKY	GSDOC	PHD-DEG
Graduate	GS	ARKY	GSMTH	MA-DEG
Graduate	GS	ART	GSDOC	SPC-G-DEG
Graduate	GS	ART	GSMTH	MA-DEG
Graduate	GS	ART	GSMTH	MFA-DEG
Graduate	GS	BISI	GSDOC	PHD-DEG
Graduate	GS	BISI	GSMTH	MSC-DEG
Graduate	GS	BMEN	GSDOC	PHD-DEG
Graduate	GS	BMEN	GSMTH	MENG-DEG
Graduate	GS	BMEN	GSMTH	MSC-DEG

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

10. 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.

Click the **Reference Type** list and click the **Reference Form** list item.

11. Click the **Look up Form ID** button.



The screenshot shows the 'Degree Program Info' tab selected in a navigation bar. The main content area displays program details for UCALG, including Academic Institution, Academic Career, Faculty, Program Reference Code, Academic Program, and Degree. Below this is the 'Program Information' section with several toggle options for email notifications and a 'Number of Referees' field set to 3. The 'Checklist Code' is GSAPPL (GS Application) and the 'Checklist Item CD Prefix' is REFER. The '*Reference Type' dropdown is set to 'Reference Form'. A red arrow points to this dropdown with the text 'Reference Type must be Reference Form'. The 'Location of the Reference Form (URL)' is http://grad.ucalgary.ca/sites/grad.ucalgary.ca/files/. Below this is a table titled 'Reference by Term' with columns for *From Term, Status, *Form ID, Version, Description, and Preview. The first row shows '2157' in the *From Term column, 'Active' in Status, and a magnifying glass icon in the *Form ID column. A red arrow points to this magnifying glass with the text 'Leave the .pdf file reference but ensure it's accurate'.

*From Term	Status	*Form ID	Version	Description	Preview
2157	Active				Preview + -

Online Reference Form

SA – Processing Applications



13. **IMPORTANT:** Once you add the online reference form and save, if your program has previously had a .pdf option, it 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 Graduate program to manually upload. Click the **Save** button.



The screenshot shows the 'Degree Program Info' tab of the online reference form. The 'Degree Program Info' tab is circled in green. The form contains the following information:

Academic Institution: UCALG University of Calgary
Academic Career: GRAD Graduate Programs
Faculty: GS Fac of Graduate Studies
Program Reference Code: ARKY Archaeology
Academic Program: GSDOC Graduate Studies Doctoral
Degree: PHD-DEG Doctor of Philosophy

Program Information

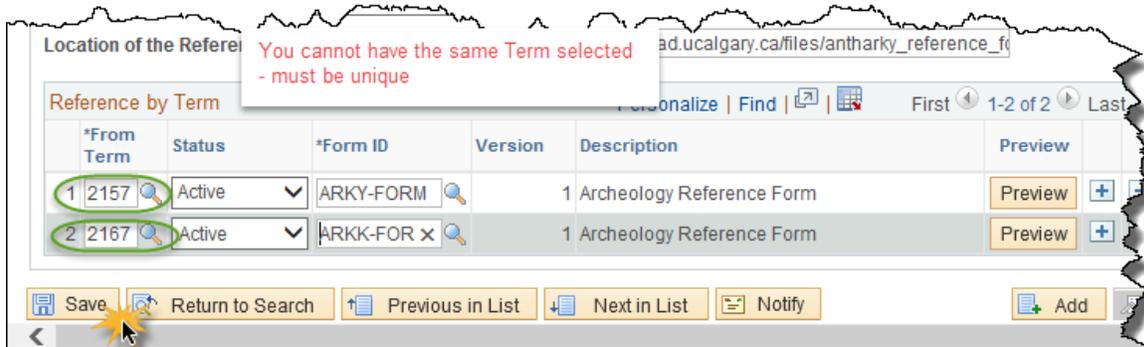
Enable automatic email notification ? Yes No
Enable email notification when all committee members has completed the evaluation? Yes No
Using a Funded/Non Funded Program Deadline? Yes No
Enable Evaluators to view all evaluations ? Yes No
Number of Referees:
Checklist Code: GS Application
Checklist Item CD Prefix:
*Reference Type:
Location of the Reference Form (URL):

Reference by Term

*From Term	Status	*Form ID	Version	Description	Preview
1 2157	Active	ARKY-FORM		1 Archaeology Reference Form	Preview

Annotations: A green arrow points to the 'Reference Type' dropdown menu. A green circle highlights the first row in the 'Reference by Term' table. A green arrow points to the 'Save' button at the bottom left.

14. Once you press save the change will occur overnight and the new form will be active and the previous form will be inactive. Click the **Save** button.

Location of the Reference: ad.ucalgary.ca/files/antharky_reference_fm

You cannot have the same Term selected - must be unique

*From Term	Status	*Form ID	Version	Description	Preview
1 2157	Active	ARKY-FORM	1	Archeology Reference Form	Preview
2 2167	Active	ARKK-FOR x	1	Archeology Reference Form	Preview

Buttons: Save, Return to Search, Previous in List, Next in List, Notify, Add

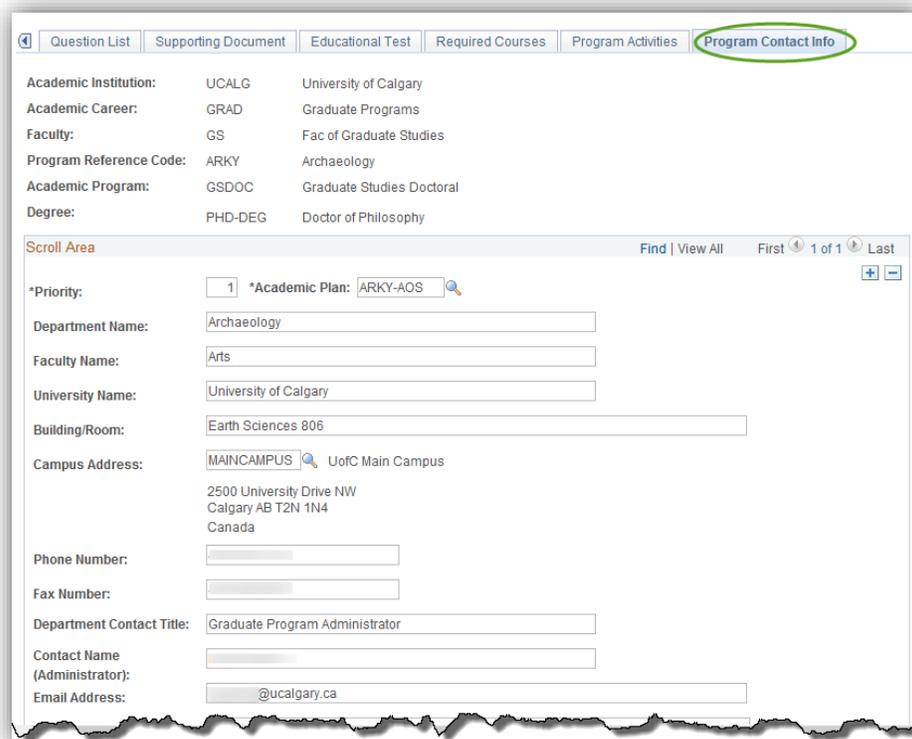
15. Please ensure the Program Contact Information is accurate. Click the **Show following tabs** button.



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



17. Update **ALL** the Faculty or department contact information as the email the referees receive will contain the details from this page and will be populated in the email signature they receive.



Question List | Supporting Document | Educational Test | Required Courses | Program Activities | **Program Contact Info**

Academic Institution: UCALG University of Calgary
 Academic Career: GRAD Graduate Programs
 Faculty: GS Fac of Graduate Studies
 Program Reference Code: ARKY Archaeology
 Academic Program: GSDOC Graduate Studies Doctoral
 Degree: PHD-DEG Doctor of Philosophy

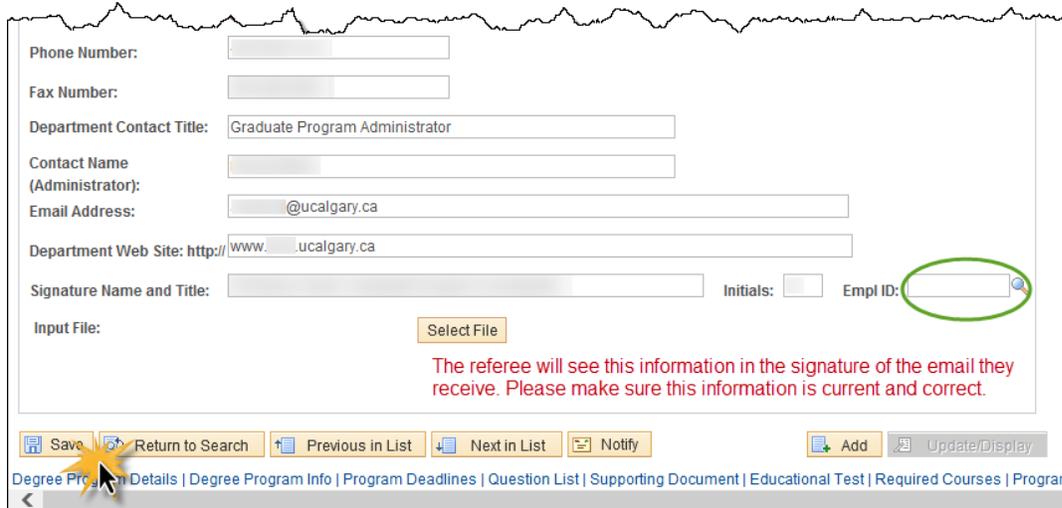
Scroll Area Find | View All First 1 of 1 Last

*Priority: 1 *Academic Plan: ARKY-AOS

Department Name: Archaeology
 Faculty Name: Arts
 University Name: University of Calgary
 Building/Room: Earth Sciences 806
 Campus Address: MAINCAMPUS UofC Main Campus
 2500 University Drive NW
 Calgary AB T2N 1N4
 Canada
 Phone Number:
 Fax Number:
 Department Contact Title: Graduate Program Administrator
 Contact Name (Administrator):
 Email Address: @ucalgary.ca

18. 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.



End of Procedure.

Please consult the Student and Enrolment Services website > Student Administration (PeopleSoft Campus Solutions) training for the corresponding Translate Table Definitions job aid and online learning for Online Reference Form.