

Planner Cycle Workflow

For

Evaluation Planner

By

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5/12/2016

IUSB/BLUE WorkFlow – Planner Cycle

The planner is a software tool developed by David Waicukauski at Undergraduate Education Office at IUB. This software is designed to serve the BLUE user community at IU. The basic use of Planner is for each campus administrator to identify which courses they would like included as the starting data source for the BLUE evaluation system.

At IUSB our work flow is as follows:

- 1) Login process
- 2) Initial cleansing process (By campus SU)
- 3) Departmental cleansing process (By department staff)
- 4) Signoff of the cleansing process (By the administrator of the unit).

STEP 1 - LOGIN PROCESS

To login to the planner, point your browser to: <https://evaluationplanner.iu.edu/course/selection>

STEP 2 - INITIAL CLEANSING PROCESS (By Campus SU)

At IUSB, each semester the campus SU will remove a pre-specified group of courses from the evaluation system. This process is as follows:

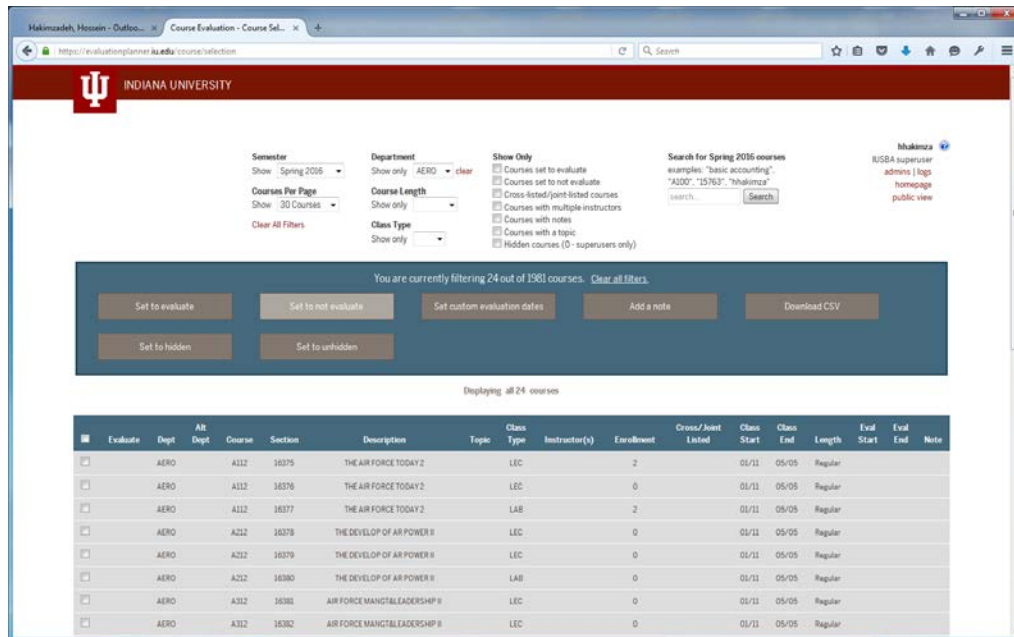
- 1) First make sure all courses are defaulted to be evaluated by clicking the **SET TO EVALUATE** button. (see figure below).

The screenshot shows the 'Course Evaluation - Course Selection' page for Spring 2016. The interface includes filters for Semester, Department, Course Length, and Class Type. A 'Show Only' section contains several checkboxes, with 'Courses set to not evaluate' highlighted by a red box. Below the filters, a control bar displays 'You are currently filtering 1981 out of 1981 courses.' and buttons for 'Set to evaluate', 'Set to not evaluate', 'Set custom evaluation dates', 'Add a note', 'Download CSV', 'Set to hidden', and 'Set to unhidden'. A table below shows a list of courses with columns for Evaluate, Dept, Course, Section, Description, Topic, Class Type, Instructor(s), Enrollment, Cross/Joint Listed, Class Start, Class End, Length, Eval Start, Eval End, and Note.

NOTE: due to server errors, or browser session timeout, etc, you may have to perform this process multiple times to make sure all the courses are set to "evaluate". It may be helpful to check the checkbox COURSES SET TO NOT EVALUATE (see below), this will identify those courses that have not yet been selected, and then we can click the SET TO EVALUTAE button.

This close-up shows the 'Show Only' filter section. It contains several checkboxes: 'Courses set to evaluate', 'Courses set to not evaluate' (highlighted with a red box), 'Cross-listed/joint-listed courses', 'Courses with multiple instructors', 'Courses with notes', 'Courses with a topic', and 'Hidden courses (0 - superusers only)'. The 'Courses set to not evaluate' checkbox is currently unchecked.

- 2) Once all the courses have been selected to be evaluation we need to remove those courses that do not need to be evaluated. Examples of these courses may include courses from Purdue Technology Program, or ROTC courses. To prevent certain courses from being evaluated, simply select the **DEPARTMENT** from the combo box, and click the **SET TO NOT EVALUATE**. (see figure below)



Below is a list of schools and departments which our campus does not conduct evaluation for:

- 1) Administrative Tracking Group
 - a. AERO (Aerospace Studies)
 - b. MIL (Military)
- 2) Statewide Technology:
 - a. CAND (Candidate)
 - b. CNIT (Computer and Information Technology)
 - c. ECET (Electrical and Computer Technology)
 - d. ENGL (English) **(Be careful not to remove ENG classes for IUSB)**
 - e. IT (Industrial Technology)
 - f. MET (Mechanical Engineering Technology)
 - g. OLS (Org. Leadership & Supervision)
 - h. TECH (Technology)
 - i. TLI (Technology Leadership)
- 3) School of Social Works
 - a. SWK (Social Work)
- 4) Labor Studies:
 - a. LSTU (Labor Studies)

In addition the following SCHOOLS AND ACADEMIC UNITS from other campuses should eventually be excluded:

OEA	Sch of Business and Economics Sch of Humanities & Social Sci Sch of Natural Science & Math School of Education
OEA Total	
OKO	Div of Allied Health Sciences Sch of Humanities & Social Sci School of Business School of Sciences
OKO Total	
ONW	College of Arts & Sciences Public & Environmental Affairs School of Business & Economics School of Education
ONW Total	
OSE	School of Arts & Letters School of Business School of Education School of Natural Sciences School of Social Sciences

So technically, the only courses that we evaluate should have the ACAD_GRP_DESC of:

ACAD_GRP_DESC
Col of Liberal Arts & Sciences
College of Health Sciences
E. M. Raclin Sch of the Arts
Leighton Sch of Bus & Econ
School of Education

This may have to be done starting summer or fall of 2016 since currently the above fields cannot be filtered in PLANNER. There might be a way to filter it in BLUE. But in my opinion doing less in BLUE is actually the wise thing to do. I think the PLANNER can be refined overtime to be “the” data source for BLUE.

SHOULD WE EXCLUDING OCC COURSES FROM BLUE EVALUATION?

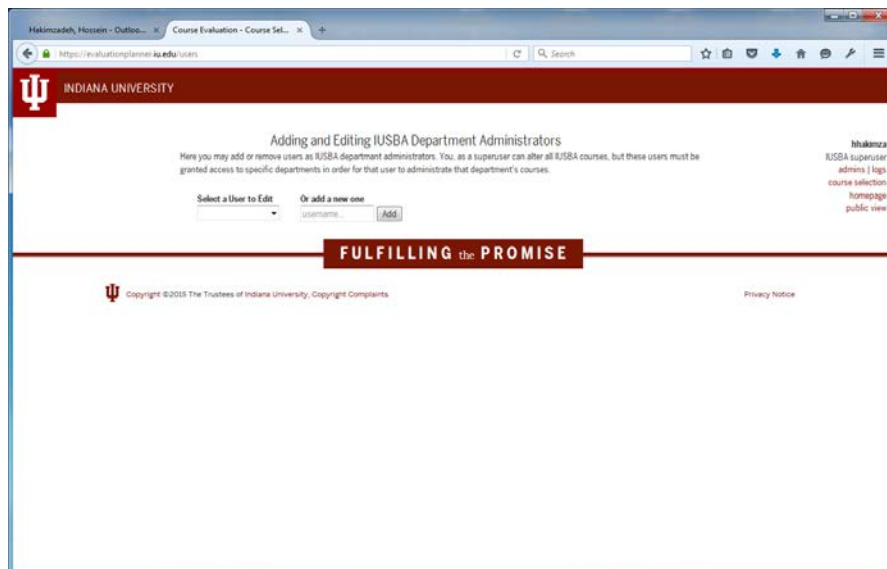
A question that needs to be answered by campus administration is if OCC courses from other campuses should be excluded from BLUE evaluation. (For example courses with Cmp_Loc_Cd = OEA, OKO, ONW, or OSE). Excluding such courses may make sense, since the faculty for these courses are not from our campus. However, it may also make complete sense to do evaluation for these courses since course evaluation is not just about the “faculty”. It is also about the “course”, and in this situation, even the “mode of instruction” is an issue. Finally, given the fact that our DFWI rates in OCC courses are nearly double that of our Face-to-face as well as our own online courses, it may make sense to get our

students' feedback about these courses that are taken from other campuses. Such feedback may allow us to improve the DFWI over time.

STEP 3 - DEPARTMENTAL CLEANSING PROCESS (By department staff)

The departmental cleansing process is very similar to the Initial Cleansing process conducted by the SU. However, it has a more limit scope, for example a single department, or a couple of departments for which the staff is responsible for.

- 5) In order to decentralize the audit process, we also need to add the department secretaries (chairs, etc.) who are the custodian for each academic program to the ADMINISTRATOR groups so that they can adjust which courses from their departments should or should not be evaluated that semester. To perform this task, click the ADMIN link (top right of the screen, figure below).



The list below represent the administrative assistants and their administrators for the college of Liberal Arts and Sciences as of 7/20/2015.

<i>Admin Assistant</i>	Email	Administrator	Academic Unit
<i>Linda Heidrich</i>	lschultz@iusb.edu	Elizabeth Dunn	LAS
<i>Jennie Downs</i>	jendowns@iusb.edu	Tom Clark	BSCI
<i>Jennie Downs</i>		Bill Feighery	CHEM
<i>Teresa Andrade</i>	tandrade@iusb.edu	Qiang Xu	CRIM
<i>Teresa Andrade</i>		Elizabeth Bennion Acting	POLS
<i>McKenzie Tozan</i>	mltozan@iusb.edu	Jake Mattox	ENG
<i>McKenzie Tozan</i>		Oscar Barrau	FORN
<i>Linda Knefely</i>	lknefely@iusb.edu	Hossein Hakimzadeh	INFO
<i>Linda Knefely</i>		Dave Surma	COIS
<i>Linda Knefely</i>		Henry Scott	PHYS
<i>Joanne Miller</i>	jomiller@iusb.edu	Yu Song	MATH
<i>Victoria Pontius</i>	vpontius@iusb.edu	Louise Collins	sb-PL
<i>Victoria Pontius</i>		Jonathan Nashel	HIST
<i>Christy Almaguer</i>	calmague@iusb.edu	Joe Chaney	MLS
<i>Christy Almaguer</i>		Dennis Rodriguez	PSY
<i>Kathi Piekarski</i>	kpiekars@iusb.edu	James VanderVeen	SOCA
<i>Kathi Piekarski</i>		Mike Keen	SUST
<i>Kathi Piekarski</i>		April Lidinsky	WMNS
<i>Sharon McFarland</i>	smcfar6@iusb.edu	Carolyn Schult	GNST

STEP 4 - SIGNOFF OF THE CLEANSING PROCESS (By the administrator of the unit)

After the departmental staff completes his/her cleansing process, the department administrator must provide a signoff. This signoff will indicate that the department has validated (FINALIZED) the data on a given date and time before the deadline, and the evaluation project can be published (initiated) after that deadline. The PLANNER provides this FINALIZATION functionality.