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*IASystem*TM 2.12
*Administrator User
Guide*

A Guide for Managing the IASystem Application

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Administrator Overview

The IASystem™ Administrator role allows a user to perform all actions with the IASystem™ application including setting up and authorizing other administrative users, performing restricted evaluation or reporting activities, and customizing online evaluation forms for their institution.

The Administrator can also set up and manage terms, manage institutional data, setup LMS integration, manage roles for IASystem™ users and manage configuration settings for their institution.

ADMINISTRATOR ACTIONS

During the course of the term, the Administrator may perform the following actions:

- ▶ **Manage Terms:** Define term by adding start and end dates, set online default open and close dates, and set faculty reports available date.
- ▶ **Manage Institutional Data:** Upload Datafiles with faculty, courses and class list data for the current term.
- ▶ **Manage Instructors & Students:** The “Instructors and Students” tool allows Administrators, Coordinators and other authorized users to add, remove, replace and assign students and instructors in a course.
- ▶ **Manage Online Forms:** Customize evaluation forms by adding or deleting questions, creating new questions and saving the revised form for use by specific departments, colleges, or the entire institution. Only users with the IASystem™ Administrator role have the ability to manage online forms; however, Administrators can assign this ability to other users (see Online Forms Guide).
- ▶ **Manage Roles & System Users:** Administrators have the ability to create custom roles & add or edit their campus IASystem™ individual user accounts.
- ▶ **Manage Integrations:** Administrators can configure & manage details related to using the IASystem™ Learning Tools Interoperability (LTI) tool for LMS integration (see Integration Guide).
- ▶ **Manage Configuration:** Administrators can manage their institution's IASystem™ configuration values & settings for the student survey and automated emails.
- ▶ **Manage Student Comment Access:** Using the IASystem™ course tree structure, Administrators can restrict other non-Administrator users from accessing student comment data (open-ended responses) in the evaluation reports generated within the administrative application.
- ▶ **Manage Faculty Request Evaluations Access and Midterm Feedback:** If your institution allows faculty to manage their own evaluations, and/or midterm feedback, Administrators can control faculty access to request/manage them at a department level. This can be done using the IASystem™ course tree structure and contacting your IASystem account manager.
- ▶ **Perform Restricted Activities:** The Administrator can perform the highest level actions within their institution's IASystem™ application. In the rare instance that an open, confirmed or closed course evaluation needs to be edited or deleted, Administrators have the authority to make these changes.
- ▶ **Access Faculty Portal as any Instructor:** In order to assist instructors, the Administrator can “Act As” any instructor via the IASystem™ faculty portal.

Terms

The first step in preparing IASystem™ to manage course evaluations is to set up the term. A term must be defined in order to upload data and create course evaluations.



MANAGE TERMS

NAVIGATE TO TERMS

Select “Manage” from Main Menu; Select “Terms” from Dropdown.

On the [Terms](#) page, if terms have been created, you will see a list of all current and past terms, as well as the evaluation information associated with each term. This information includes the start and end date for each term, dates for online evaluation delivery, and date for faculty access to evaluation results.

ADD TERMS

On the [Terms](#) page, click the left blue “Add Term” button to navigate to the [Add Term](#) page.

- Select the term name (term names are defined by your institution at setup)
- Select the year associated with the term
- Enter term start and end dates in the “First Day” and “Last Day” fields
- If LMS integration is enabled, the Term ID field will be displayed:

TERM: Autumn ← Term name dropdown (defined by your campus at setup)

YEAR: 2016 ← Year dropdown (combined with Term = a specific instance of a term)

Term ID only displayed if required by an LMS Integration → TERM ID: SIS Term Id IASystem has an active integration with your LMS and requires a corresponding term identifier.


FIRST DAY: 09/01/2016


LAST DAY: 12/16/2016

- Online evaluation default dates (optional):
 - Default Open/Close dates for online evaluations can be established for the term
 - Open/Close dates will automatically populate when users create evaluations; dates can be locked to prevent users from modifying

- Reports available date (required):
 - This is the date instructors are able to access their course evaluation reports in the faculty portal for the term (best practice is after grade submission due date)
 - Reports available date will automatically populate when users create evaluations; date can be locked to prevent users from modifying

EDIT AND DELETE TERMS

To delete an existing term, click the red "x" on the [Terms](#) page. 

To edit an existing term, click the pencil icon on the [Terms](#) page. 

This will direct to the [Edit Term](#) page. Update values; when all selections are finalized, click the "Edit Term" button.

When editing the **Online Evaluation Dates** of an existing term, the following message will be displayed:

Changing evaluation default dates only impacts future evaluations and does NOT change the date of existing evaluations; these can be edited in View and Manage Evaluations.

Institutional Data

The second step in preparing IASystem™ to manage course evaluations is to import three required Institutional Datafiles. This data includes required information about instructors, courses, and class lists for each term.



IASystem™ provides Excel (.xls) templates for all 3 file uploads; however, for large data sets we recommend that you save as a "CSV" file and then import the data in that file format. **Please review the instructions and data definitions located in each data file template.** Data uploads must occur in this order:

1. Instructors
2. Courses (Time Schedule)
3. Class Lists (Students)

UPLOAD BEHAVIOR AND DEPENDENCIES FOR INSTITUTIONAL DATAFILES

Institutional files are uploaded within IASystem™ one or more times per term to keep client faculty, student and course data up-to-date.

If re-importing data after the initial upload, please be aware that authorized users can also manage instructor and student data within a course via the [Manage Instructors and Students](#) feature. Since institutional data imports are considered the primary data source, if a user modifies instructors or students in a course and datafiles are re-imported later in the term without the same updates, the institutional data being imported will override previous local edits.

Note: *It is important to ensure instructor and student edits are also updated in the original data source if data imports will be refreshed throughout the term. An institution's data imports are considered the primary data source and always "win."*

1. Instructors File

Upload behavior:

- Adds new and updates existing records.
- Enduring list; preserves existing faculty records between terms.
- First matches on username, then employee ID.

Dependencies: None

2. Courses File

Upload behavior:

- Adds new and updates existing records for a selected term.
- Existing records not present in the upload file are left unchanged.
- Does not remove courses that were in previous uploads.
- Matches on unique course ID number within the term.

Dependencies:

- Course abbreviation must exist in institution course tree.
- Instructor IDs must exist in IASystem™ from a Faculty File upload.

Joint Courses:

Representing joint sections is flexible within IASystem™. Here is an example of a Courses File upload template with three courses, each made up of three sections:

| Course | Abbreviation | Number | Section | Title | Credit | Employee ID | Joint ID |
|--------|--------------|--------|---------|---------------|--------|-------------|----------|
| 90001 | MATH | 400 | A | Math 400 Test | 5 | Fac007 | |
| 90002 | MATH | 400 | B | Math 400 Test | 5 | Fac007 | 90001 |
| 90003 | MATH | 400 | C | Math 400 Test | 5 | Fac007 | 90001 |
| 90004 | MATH | 401 | A | Math 401 Test | 5 | Fac007 | 90004 |
| 90005 | MATH | 401 | B | Math 401 Test | 5 | Fac007 | 90004 |
| 90006 | MATH | 401 | C | Math 401 Test | 5 | Fac007 | 90004 |
| 90007 | MATH | 402 | A | Math 402 Test | 5 | Fac007 | 90008 |
| 90008 | MATH | 402 | B | Math 402 Test | 5 | Fac007 | 90009 |
| 90009 | MATH | 402 | C | Math 402 Test | 5 | Fac007 | 90007 |

The following methods of joint course representation are commonly found at institutions and are supported within IASystem™.

Parent-Child Joint Relationship

In the example above, the first two courses – MATH 400 and MATH 401 – represent jointedness in a “parent-child” or “tree” fashion. One section was chosen (it doesn’t matter which) and all sections joint with it are assigned its Course ID. In the MATH 400 example, the parent section has no Joint ID value; while in the MATH 401 example, the parent uses its own ID as its Joint ID. Either way will work.

Circular Joint Relationship

The third course, MATH 402, represents jointedness in a circular fashion, where one section “points to” the next via the Joint ID value.

Note: Please be aware that IASystem™ preserves courses and instructors, including jointedness, when they have an associated evaluation.

3. Class Lists File

File contains student user and class list data (the link between student and course) and creates both student user records and class list records.

Upload behavior

- Adds new and updates existing records for a selected term.
 - Student records are added and updated, but never deleted
 - Class list records are added and deleted for any Course ID present in the file; if a file is re-imported in a specific term, dropped students will be removed from the course
- For existing Course IDs not present in the file, their associated class list records are left unchanged
- First matches on username, then student ID.

Dependencies:

Course IDs must exist in IASystem™ from a Courses File upload.

UPLOAD PROCESS FOR INSTITUTIONAL DATAFILES

IASystem™ provides a tool for users to directly upload their institutional data files by Excel or CSV file within the administrative application.

Note: The upload templates for all the files are Excel 97-2003 workbook. IASystem™ will only accept Excel files with the .xls extension, not .xlsx files. Please make sure to save file in the correct format. Alternatively, IASystem™ uploads can also be saved and imported in plain-text CSV file format.

To navigate to the Institutional Data tool:

1. Select “Manage” from Main Menu.
2. Select “Institutional Data” from Dropdown.
3. From the Institutional Data page, select the blue tab for the file type to be uploaded.

Institutional Data

The screenshot shows the 'Institutional Data' page with the 'Instructors' tab selected. On the left, there is a navigation menu with 'Instructors' (highlighted), 'Courses', and 'Class Lists'. The main content area is titled 'Instructors' and contains two sections: 'Datafile (Excel or CSV)' with the text 'Last uploaded at 1:26 PM on May 07, 2015' and an 'UPLOAD' button with a red arrow icon, and 'Excel Template' with a 'DOWNLOAD' button with a green arrow icon.

Upload Instructors

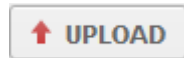
GENERATE INSTRUCTOR DATAFILE

Specific information is required to upload instructors into IASystem™. To view this information, download the [Excel template](#) which provides directions and data definitions.

1. On the “Instructors” tab, click the download button with a green arrow.
2. Download and fill out the Excel template with all required information.

UPLOAD INSTRUCTOR DATA

Once your datafile is ready, on the “Instructors” tab, click the upload button with a red arrow. This will take you to the “Upload Instructors” page.



1. The Term should be listed as “ALL”. If importing data for the first time and a term has not been setup, first go to Manage/Terms and setup the initial term.
2. Click the “Choose File” button and select the datafile from your computer.
3. The name of your datafile will now be listed to the right of the “Choose File” button.
4. To import the file, click the “Upload” button.
5. The next page validates the data.
 - If data passes validation (no issues or missing information) the system will show how many rows of data are ready for upload and displays a preview of the first 5 rows of data in the upload file.
 - If data does not pass validation (incorrect or missing data) the system will provide *data validation messages* to help users enter data correctly, or alert them of data validation errors. These messages will indicate the location and type of data that needs to be corrected and will instruct to correct the file and upload again.
6. Once file is correct, click the “Upload” button.
 - A message will be displayed showing how many rows of data were processed and how many records were added/updated.
 - To upload another Instructor file, select “Choose File” and then select “Upload.”
 - To go back to the main Institutional Data page, select “Return.”

Upload Courses

GENERATE COURSES DATAFILE

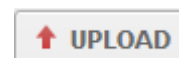
Specific information is required to upload courses into IASystem™. To view this information, download the [Excel template](#) which provides directions and data definitions.

1. On the “Courses” tab, click the download button with a green arrow.
2. Download and fill out the Excel template with all required information.

Note: The “Joint ID” field in the upload template provides support for joint/cross-listed courses. Once uploaded, cross listed courses that span colleges/departments will show up in all relevant locations within the application. For example if LAW 546 is joint with BUS 490, the Law School would see the course listed as LAW 546, cross-listed with BUS 490 and the Business School would see BUS 490, cross-listed with LAW 546.

UPLOAD COURSE DATA

Once your datafile is ready, on the “Courses” tab, click the upload button with a red arrow. This will take you to the [Upload Courses](#) page.



1. Select the term that corresponds to the courses you are uploading (*defaults to current term*).
2. Click the “Choose File” button and select the datafile from your computer.
3. The name of your datafile will now be listed to the right of the “Choose File” button.
4. To import the file, click the “Upload” button.
5. The next page validates the data.
 - a. If data passes validation (no issues or missing information) the system will show how many rows of data are ready for upload and displays a preview of the first 5 rows of data in the upload file.
 - b. If data does not pass validation (incorrect or missing data) the system will provide *data validation messages* to help users enter data correctly, or alert them of data validation errors. These messages will indicate the location and type of data that needs to be corrected and will instruct to correct the file and upload again.
6. Once file is correct, click the “Upload” button.
 - a. A message will be displayed showing how many rows of data were processed and how many records were added/updated.
 - b. To upload another Courses file, select “Choose File” and then select “Upload.”
 - c. To go back to the main Institutional Data page, select “Return.”

Upload Class Lists

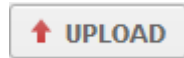
GENERATE CLASS LISTS (STUDENTS) DATAFILE

Specific information is required to upload instructors into IASystem™. To view this information, download the [Excel template](#) which provides directions and data definitions.

1. On the “Class Lists” tab, click the download button with a green arrow.
2. Download and fill out the Excel template with all required information.

UPLOAD CLASS LISTS DATA

Once your datafile is ready, on the “Class Lists” tab, click the upload button with a red arrow. This will take you to the [Upload Class Lists](#) page.



1. Select the term that corresponds to the class lists you are uploading (defaults to current term).
2. Click the “Choose File” button and select the datafile from your computer
3. The name of your datafile will now be listed to the right of the “Choose File” button
4. To import the file, click the “Upload” button
5. The next page validates the data:
 - a. If data passes validation (no issues or missing information) the system will show how many rows of data are ready for upload and displays a preview of the first 5 rows of data in the upload file.
 - b. If data does not pass validation (incorrect or missing data) the system will provide *data validation messages* to help users enter data correctly, or alert them of data validation errors. These messages will indicate the location and type of data that needs to be corrected and will instruct to correct the file and upload again.
6. Once file is correct, click the “Upload” button. A message will be displayed showing how many rows of data were processed and how many records were added/updated.

Note: *This is generally the largest of the 3 datafiles and due to file size, may take several minutes to import.*

7. To upload another Class Lists file, select “Choose File” and then select “Upload.”
8. To go back to the main Institutional Data page, select “Return.”

Manage Instructors and Students

The “Instructors and Students” page allows Administrators, Coordinators and other authorized users to add, remove, replace and assign students and instructors in a course.

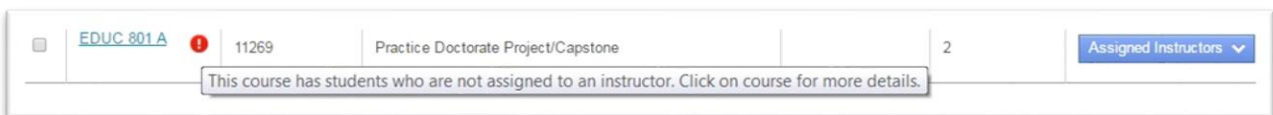
Note: Changes made by users in the Manage Instructors and Students feature can be overwritten if Institutional Datafiles are re-uploaded and do not include these changes; Institutional Datafiles are considered the primary data source and always ‘win’.

NAVIGATE TO INSTRUCTORS AND STUDENTS

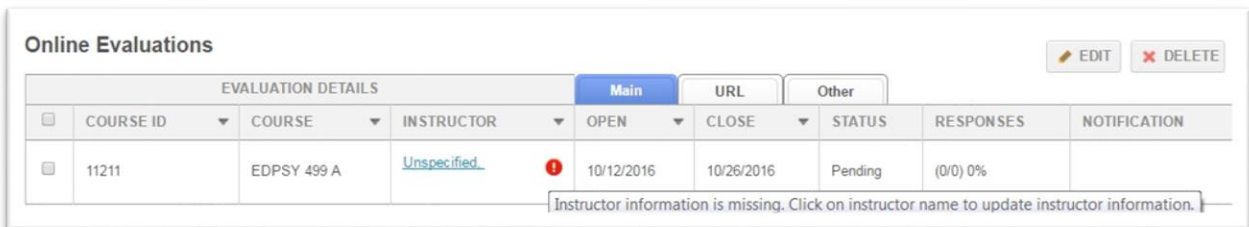
There are two methods to navigate to the Manage Instructors & Students tool:

METHOD 1: NAVIGATE FROM AN ALERT NOTIFICATION

A red **ALERT** notification can occur while creating, editing or viewing course evaluations. These alerts will display when critical information is missing. The alert provides a hyperlink to redirect to the course page in the *Manage Instructors & Students* tool where a user can provide the missing information.



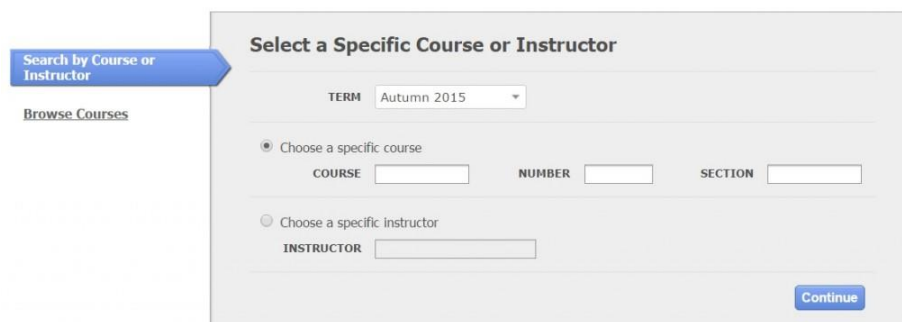
Example 1: An assigned instructor course with missing information



Example 2: A course with missing instructor information

METHOD 2: NAVIGATE FROM MANAGE MENU DROPDOWN

1. Select “Manage” from Main Menu.
2. Select “Instructors and Students” from Dropdown.
3. From the Instructors and Students page, select either the blue “Search by Course or Instructor” tab or the “Browse Courses” tab.



Search by Course or Instructor:

- Select Term (defaults to current term).
- Option 1: Select radio button to choose a specific course.
- Option 2: Select radio button to choose a specific instructor (start typing in the instructor last name and you will be presented with instructors whose name starts with those letters. For example, if you type in “Bro” you would see Brock, Brown, etc.)

Browse Courses:

- Select Term (defaults to current term).
- Select College (defaults to ‘All’ or User’s specific college they are scoped to).
- You may further refine your selection by Department and/or Course.

When all selections are made, click “Continue.”

Depending on your selection, you will either be presented with a list of courses or a specific course. If you are presented with a list of courses, click on the hyperlink for the course that you wish to manage.

EDIT INSTRUCTORS AND STUDENTS

The [Edit Instructors and Students](#) page is comprised of an instructor section and a student section.







- Managing instructors includes the ability to **edit**, **delete**, **replace** or **add** an instructor in the course
- Managing students includes the ability to **edit**, **delete** or **add** a student in the course; additionally, for assigned instructor courses, users have the ability to **assign** a student to an instructor in the course


Summer 2016 - EDUC 801 A - Practice Doctorate Project/Capstone

CourseID: 11269 - Assigned Instructor

Enrollment: 2







Instructors


| NAME | USERNAME | EMAIL | RANK | EMPLOYEE ID | ENROLLMENT | ACTION |
|-----------------|----------|------------------------|-------|-------------|------------|---|
| Leffler, Trevor | tleffler | instructor@example.edu | Other | Fac001 | 1 |    |
| Lowell, Nana | nlowell | instructor@example.edu | Other | Fac002 | 0 |    |

Add instructor  Add additional instructors to the course

INSTRUCTOR EDIT, REMOVE, & REPLACE OPTIONS
↓

Students

| NAME | USERNAME | EMAIL | STUDENT ID | INSTRUCTOR | ACTION |
|----------------|----------|---------------------|------------|-----------------|---|
| Loss, Joanna | jmlloss | student@example.edu | Stu008 | Leffler, Trevor |    |
| Smith, Deborah | drs25 | student@example.edu | Stu019 | |    |

Add student  Add additional students to the course

STUDENT EDIT, REMOVE & ASSIGN (AI Courses Only) OPTIONS
↓

ACTIONS FOR MANAGING INSTRUCTORS

When managing instructors in a course, the behaviors of each action may be different depending on whether the instructor is associated with an existing course evaluation. Please review these actions carefully:



Edit: By selecting the edit icon, a user can add or change instructor details.

- First Name, Last Name, Username, Email Address, and Rank fields can be added/changed.
- Instructor edits will be reflected in all evaluations for this instructor for the current term.
- Employee ID field can only be added and cannot subsequently be edited.
- Edit is disabled for “Unspecified” instructors. These records can only be replaced.



Delete: The delete icon will remove the instructor from the course.

- If the course only has a single instructor, the instructor cannot be deleted, but can be replaced using the “replace” action or the “add instructor” hyperlink to assign another instructor to the course.
- If the course is joint, the instructor will be removed from all the associated joint courses.
- If instructor has a pending online evaluation, or pending/confirmed paper evaluation, and there are no other instructors associated with the evaluation, the evaluation will also be deleted.
- If instructor has an open/closed online or paper evaluation, they cannot be deleted from the course.



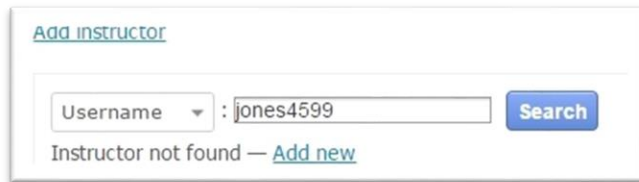
Replace: By selecting the replace icon, a user can replace the existing instructor with another instructor.

- If the course is joint, the replaced instructor will be added to all the associated joint courses.
- If the instructor being replaced has a pending online evaluation, or pending/confirmed paper evaluation, the new instructor will be added to the course and the existing evaluation.
- If instructor has an open/closed online or paper evaluation, they cannot be replaced with another instructor.

Add Instructor: By selecting the add instructor hyperlink, a user can add additional instructor(s) to the course.

Search to see if the instructor record exists in the system. You can search by either username or ID number by toggling the dropdown. If a record exists, you can add it to the class.

If no record exists, you can add a new record. Click “Add new” and a pop up form will appear. Fill out the required information and “Save.”



- If the course is joint, the added instructor will be added to all the associated joint courses.
- If there is an existing evaluation associated with the course, the additional instructor(s) will not be added to the evaluation. (To create an evaluation for an added instructor you must go to Evaluations, select the course, and create a new evaluation for the instructor.)

ACTIONS FOR MANAGING STUDENTS

When managing students in a course, the behaviors of each action may be different depending on whether the course has an existing course evaluation. Please review these actions carefully:



Edit: By selecting the edit icon, a user can add or change student details.

- First Name, Last Name, Username, Email Address, and Rank fields can be added/changed
- Student ID field can only be added and cannot subsequently be edited




Delete: The delete icon will remove the student from the course.

- If the course is joint, the student can only be deleted from the specific course for which they enrolled. *For example: To delete a student enrolled in MATH 201, joint with MATH 211, you can delete them from the class list on the MATH 201 course page. They cannot be removed from the class list on the MATH 211 course page.*
- If the course has a pending online evaluation, or pending/confirmed paper evaluation, the evaluation enrollment will be updated.
- If the course has an open/closed online or closed paper evaluation, the evaluation enrollment will not be updated.
- Any responses submitted from deleted students will not be removed from the evaluation.



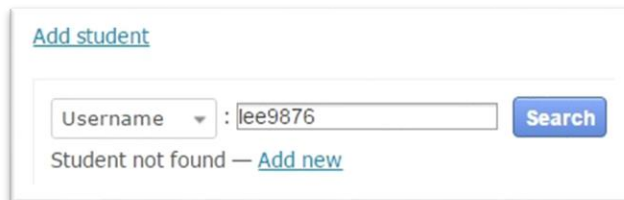
Assign: The assign icon will assign a student to an instructor.

- The “assign” icon will only be displayed for Assigned Instructor courses (course types, such as independent study, that have multiple instructors working with a subset of students).
- A popup window will be displayed with all available instructors; select the instructor(s) that the student should be assigned to and select the Save button to retain changes.



Add Student: By selecting the add student hyperlink, a user can add additional student(s) to the course.

Search to see if the student record exists in the system. You can search by either username or ID number by toggling the dropdown. If a record exists, you can add it to the class. If no record exists, you can add a new record. Click “Add new” and a pop up form will appear. Fill out the required information and “Save.”



- If the course is joint, the added student will be added to class list of the specific course being edited (but will be displayed as a student in the joint courses).
- If the course has a pending online evaluation, or pending/confirmed paper evaluation, the evaluation enrollment will be updated.
- If the course has an open/closed online or closed paper evaluation, the evaluation enrollment will not be updated.

Roles

The “Roles” page displays a chart of IASystem™ roles and actions. This page defines the access each user has to complete various actions within IASystem™. Administrators can view and add roles for their institution’s IASystem™ system users on this page.

Manage Roles

NAVIGATE TO ROLES

Select “Manage” from Main Menu. Select “Roles” from dropdown. On the [Roles](#) page, you will see a list of the system users and their access to actions with IASystem™. A green check indicates that a system user has permission to access the corresponding action. These permissions enable system users to complete various actions within IASystem™.

TYPES OF ROLES

1. **IASystem™ Roles** are predefined and cannot be altered. These roles include Administrator, Coordinator, and Dean/Chair. The Faculty and Student roles have no actions associated with them.
2. **Custom Roles** can be created to assign system users with access to different actions in IASystem™.

Note: To create a role that can only view evaluations but not perform any actions, create a Custom Role and do not check any boxes.

ADD, EDIT AND DELETE CUSTOM ROLES

To edit, add, and delete custom roles, click the blue “Edit” button on the left side of the [Roles](#) page. This will take you to the “Edit Roles” page. This page provides the opportunity to manage custom roles and their associated actions.

Add custom role: type the label of the new role in the text box. Select the checkbox(es) that correspond to *IASystem™* actions in order to enable users with this role to perform selected actions.

Edit custom role: editing allows you to update the label for the role and to edit the permissions for existing custom roles by selecting/deselecting the boxes that correspond to the *IASystem™* actions.

Delete a custom role: click the red delete button below the custom role’s title. The user(s) associated with the custom role will no longer have access to the associated actions, but they remain in *IASystem™* (users can be deleted via the “System Users” page).

When all selections are finalized, click the “Save Roles” button.

EDIT ROLES

Edit Roles

| | VIEW RESULTS | MANAGE EVALUATIONS | MANAGE INSTRUCTORS & STUDENTS | MANAGE TERMS | MANAGE INSTITUTIONAL DATA | MANAGE CUSTOM FORMS | MANAGE ROLES | MANAGE SYSTEM USERS | MANAGE INTEGRATIONS | MANAGE CONFIGURATION | ACT AS FACULTY |
|------------------------|--------------------------|--------------------------|-------------------------------|--------------------------|---------------------------|--------------------------|--------------------------|--------------------------|-------------------------------------|--------------------------|--------------------------|
| IA System Roles | | | | | | | | | | | |
| Administrator | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ |
| Coordinator | ✓ | ✓ | ✓ | | | | | | | | |
| Dean/Chair | ✓ | | | | | | | | | | |
| Faculty | | | | | | | | | | | |
| Student | | | | | | | | | | | |
| Custom Roles | | | | | | | | | | | |
| Custom Role | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Delete | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

CUSTOM ROLE EXAMPLE

An Administrator wants to allow a Coordinator the ability to create custom online forms. Since that action is not associated with the standard IASystem™ Coordinator role, the Administrator can create custom role with the “Manage Custom Forms” action selected and assign that additional custom role to the user as shown in the following example:

Edit System User

The screenshot shows the 'Edit System User' form with the following fields and values:

- USERNAME: iasystem
- FIRST NAME: Demo
- LAST NAME: Coordinator
- EMAIL ADDRESS: iasystem@uw.edu
- ROLES: Administrator, Coordinator, Dean/Chair, Custom Forms
- DATA FILTERS: [Add Filter](#)
- COLLEGE: Education
- SUBCOLLEGE: -- All --
- DEPARTMENT: -- All --
- Buttons: Cancel, Save, Delete

System Users

System users and their associated permissions can be viewed on the “System Users” page. Administrators can add and/or change permissions of IASystem™ users on this page.

Examples of various system users include:

- ▶ *A faculty support staff person wants to create evaluations and generate reports for the College of Engineering. The Administrator would add the staff person, assigning them role of “Coordinator” and filter them to the College of Engineering.*
- ▶ *The Dean for the School of Nursing wants to have access to course evaluation reports for their faculty. The Administrator would add the dean, assigning them role of “Dean/Chair” and filter them to the School of Nursing.*
- ▶ *The Administrator wants to delegate the job of importing institutional data to a staff person in their IT department. The Administrator would create a custom role that has the action “Upload & Edit Institutional Data” and add the IT department staff person as a system user with the new custom role.*

Manage System Users

NAVIGATE TO SYSTEM USERS

Select “Manage” from Main Menu.

Select “System Users” from Dropdown.

On the [System Users](#) page, there is a list of all system users with their user information. The search bar provides a quick look up for a single user.


ADD USER


On the “System Users” page, click the blue “Add User” button on the left. This will take you to the “Add System User” page. You can add a system user two ways:

1. Search for an existing user using their username, student ID, or employee ID.
2. Manually add a user by completing the following fields:
 - Username (the person’s username assigned by your institution)
 - First and Last Name
 - Email address
 - Select role for the system user (For example: System Coordinator, Coordinator, Dean/Chair, or a custom role. See “Roles” section to add custom roles).
 - Optional: add a filter (such as the user’s college, sub-college, or department) by clicking “Add Filter” and selecting the user’s roles from the dropdown menus.
3. When all selections are finalized, click the “Add User” button.

You are now on the [System Users](#) page.

EDIT AND DELETE SYSTEM USERS

To delete a system user, click the red “x” on the System Users page. 

To edit the information for a system user, click the pencil icon on the System Users page.  This will take you to the “Edit System User” page where you can edit the details for a selected system user.

When all selections are finalized, click the “Save” button.

Configuration

The “Configuration” page allows an institution to customize the display for email notifications and online evaluations.

Note: Midterm Welcome Text is also customizable if enabled by your institution. Administrators must contact your IASystem™ account manager or email support@iasystem.org to request this feature be turned on.

NAVIGATE TO CONFIGURATION

Select “Manage” from Main Menu; Select “Configuration” from Dropdown.

The Configuration page provides details specific to your institution’s email & online evaluation setting. Click the blue “Edit” button to update the following configuration categories:

| CATEGORY | DESCRIPTION |
|-----------------------------|--|
| Contact Organization | <p>The contact organization name is used in conjunction with the contact email address in the “from” and “reply-to” email headers used for automated email notifications sent to students and faculty via IASystem™.</p> <p>Example: From: "University Course Evaluations" <evals@university.edu> Reply-to: "University Course Evaluations" <evals@university.edu></p> |
| Contact Email | <p>The contact email address is used as the “from” and “reply-to” email address for IASystem™ automated email notifications. We recommend this be a departmental email account.</p> <p>Example: From: "University Course Evaluations" <evals@university.edu> Reply-to: "University Course Evaluations" <evals@university.edu></p> <p>The contact email address also appears in the following places:</p> <ul style="list-style-type: none"> • In the “Help” section of the student online evaluation; the contact email is used in conjunction with contact name and is the email address a student would use if they have questions or issues with an online evaluation. • In the IASystem™ faculty portal; the contact email is used in conjunction with contact name and is the department or person a faculty member would contact if they have questions or issues about their course evaluations. |
| Contact Name | <p>The contact name is used in conjunction with contact email and should be a department or person that can troubleshoot internal issues related to course evaluations. The contact name appears in the following places:</p> <ul style="list-style-type: none"> • In the “Help” section of the student online evaluation; the contact name is used in conjunction with contact email and is the department or person a student would contact if they have questions or issues with an online evaluation. • In the IASystem™ faculty portal; the contact name is used in conjunction with contact email and is the department or person a faculty member would contact if they have questions or issues about their course evaluations. |

| CATEGORY | DESCRIPTION |
|-----------------------------|---|
| Email Signature | The closing signature on email notifications sent to students and faculty. |
| Survey Color | The hex color code is used to customize the color of you institution's banner on online evaluations. You can either select the color by entering in the hex color number or by clicking on the color swatch and manually selecting the color from the gradient. |
| Survey Logo | The institution's logo displayed on online evaluations. A reversed logo is recommended so that it will display properly on the survey color background. The maximum size is 400 x 100 pixels. |
| Survey Banner | The institution's banner displayed on online evaluations. The recommended banner size is 1500 x 200 pixels. |
| Survey Welcome Text | The information displayed on the first page of online evaluations. Default text is provided and can be modified using the text editor tools. |
| Midterm Welcome Text | If enabled, the information displayed on the first page of midterm feedback. Default text is provided and can be modified using the text editor tools. |

EDIT CONTACT INFORMATION

To edit the **Contact Organization**, **Email**, **Name**, and **Email Signature**, manually enter the corresponding information into the fields.

EDIT SURVEY COLOR, LOGO, AND BANNER

There are two ways to edit the **Survey Color**:

1. Click on the current hex color swatch and select the desired color.
2. If the color swatch number is known, enter in the hex color code (ex. #39275b).

To edit the **Survey Logo** or **Banner**:

1. Click the "Choose File" button.
2. Select the banner/logo file from your computer.
3. The name of your file will now be listed to the right of the "Choose File" button.
4. To upload the file, click the blue "Continue" button.
5. To remove or change a logo or banner image, you can either upload a new image which will replace the previous image or you can select the check box next to the question, "Do you want to delete the logo (or) banner?"

To edit the **Survey Welcome Text** (if enabled: **Midterm Welcome Text**):

1. Default text is provided in the Survey Welcome Text (if enabled: Midterm Welcome Text) box.
2. To modify the message, use the text editor tools.

You may preview your changes by clicking "Preview Evaluation", if enabled "Preview Midterm Feedback", on the left side of the page. This will open a new tab on your browser.

When all changes have been made, click the blue "Save" button at the bottom of the page.

Course Tree

The “Course Tree” page displays the organizational structure of your institution’s college(s), department(s), and/or courses within the system. It provides Administrators with the ability to manage access to student comments on course evaluation reports within the IASystem™ administrative application (faculty always have access to student comments within the IASystem™ faculty portal). Administrators can also manage, at a department level, the ability to allow faculty to request their own evaluations through the IASystem™ Faculty portal.

View Course Tree

Select “Manage” from Main Menu; Select “Course Tree” from Dropdown.

On the [Course Tree](#) page, you will see details specific to your institution’s course evaluation setup. These details include:

| CATEGORY | EXAMPLE |
|----------------------------|--|
| College/Sub-College | The colleges within your institution, and the evaluation letter associated with each college. <i>For example: Business, D</i> |
| Department | The department within the college, and the abbreviated title for that department. <i>For example: Business Administration, BUS</i> |
| Course | The course within the department, and the abbreviated listing for that course. <i>For example: Accounting, ACCT</i> |

COURSE TREE MODIFICATIONS

If changes need to be made to the Course Tree structure, please contact your IASystem™ account manager or email support@iasystem.org.

Student Comment Access

To support institution or college level policies regarding access to student comments in course evaluation reports, IASystem™ allows an Administrator to grant or revoke access to other system users in the administrative interface who are generating or viewing reports via the Course Tree structure.

The Administrator role is the only role that can control access to student comments and this action cannot be assigned to other roles. Because this role controls access, Administrators can always view student comments. Please take this into consideration before assigning the role of Administrator to other users.

Note: These permissions do not affect instructors’ access to student comments in the IASystem™ faculty portal – instructors always have access to the open-ended responses provided by students.

MANAGE STUDENT COMMENT ACCESS

1. Select “Manage” from Main Menu.
2. Select “Course Tree” from Dropdown.

- To the right of the drop-down bar titled “View Student Comments”, you can click “Check all” (grant) or “Uncheck all” (revoke) to manage access for system users across the entire institution.
- Individual Colleges/Sub-Colleges can be managed by selecting/deselecting the checkbox next to each College/Sub-College category.
- After selections are made, click the blue “Save Changes” button.

Course Tree

| View Student Comments | | Check all (grant) Uncheck all (revoke) | | Save Changes | |
|-----------------------|--|--|---|--------------|-----------------------------------|
| View Student Comments | | DEPARTMENT | | COURSE | |
| CA | <input type="checkbox"/> College of Arts and Sciences / Arts | ART | Art | ART | Art |
| | | | | DESIGN | Design |
| | | ART H | Art History | ART H | Art History |
| | | ARTS | Arts Program | ARTS | Arts Program |
| | | DXARTS | Ctr for Digital Arts & Experimental Media | DXARTS | Digital Arts & Experimental Media |
| | | DANCE | Dance | DANCE | Dance |

Faculty Request Evaluations Access

IASystem™ allows an Administrator to grant or revoke access, at a department level, to their faculty with the ability to request their own evaluations through the IASystem™ Faculty portal based on the Course Tree structure. This feature supports institution or college level policies regarding Faculty access to request their own paper and/or online course evaluations.

The Administrator role is the only role that can control access to allow faculty to request their own evaluations and this action cannot be assigned to other roles. Because this role controls access, Administrators can add/remove access by department and/or college. Departments that are disallowed access will prevent faculty from requesting for that department but may have access to other departments that are granted access. Please take this into consideration before allowing faculty to request their own evaluations.

Note: Administrator's must contact your IASystem™ account manager or email support@iasystem.org to request this feature be turned on.

MANAGE FACULTY REQUEST EVALUATIONS ACCESS

- Select “Manage” from Main Menu.
- Select “Course Tree” from Dropdown.
- To the right of the drop-down bar titled “Faculty Request Evaluations”, you can click “Check all” (grant) or “Uncheck all” (revoke) to manage access for system users across the entire institution.
- Individual Colleges/Sub-Colleges and Departments can be managed by selecting/deselecting the checkbox next to each College/Sub-College and Department category. If a College/Sub-college checkbox is selected but the Department checkboxes are left deselected, this will result in all departments in this College/Sub-college being granted the permission.
- After selections are made, click the blue “Save Changes” button.

Course Tree

Faculty Request Evaluations
 Faculty Request Evaluations
 View Student Comments

Check all (grant) | Uncheck all (revoke)

Save Changes

| | DEPARTMENT | | COURSE | |
|--|------------|--|--------|-----------------------------------|
| CA <input checked="" type="checkbox"/> College of Arts and Sciences / Arts | ART | <input checked="" type="checkbox"/> Art | ART | Art |
| | | | DESIGN | Design |
| | ART H | <input type="checkbox"/> Art History | ART H | Art History |
| | ARTS | <input type="checkbox"/> Arts Program | ARTS | Arts Program |
| | DXARTS | <input type="checkbox"/> Ctr for Digital Arts & Experimental Media | DXARTS | Digital Arts & Experimental Media |
| | DANCE | <input checked="" type="checkbox"/> Dance | DANCE | Dance |
| | DRAMA | <input type="checkbox"/> Drama | DRAMA | Drama |

Manage Course Evaluations

The IASystem Administrator level user can perform the highest level actions within their institution's IASystem™ application. In the rare case an open, confirmed or closed course evaluation needs be edited or deleted, Administrators have the authority to make these changes.

Note: When you delete an evaluation, the entire evaluation and any of its responses will be deleted from your account. Exercise caution in deleting evaluations that may have response data attached – once deleted this action cannot be undone.

There are different actions an Administrator can perform depending on whether the evaluation is online or on paper. The following sections define the actions Administrators can perform in managing both online and paper evaluations:

Manage Online Evaluations

Administrator Permissions for Editing & Deleting Online Evaluations

| ONLINE STATUS | EDIT FORM TYPE | EDIT OPEN DATE | EDIT CLOSE DATE | EDIT REPORTS AVAILABLE DATE | EDIT COURSE TYPE | DELETE |
|---------------|----------------|----------------|-----------------|-----------------------------|------------------|----------|
| Pending | YES | YES | YES | YES | YES | YES |
| Open | NO | NO | YES | YES | YES | YES (NO) |
| Closed | NO | NO | YES (NO) | YES (NO) | YES (NO) | YES (NO) |

Note: Parenthetical (NO) indicates this action is not allowable for users with the role of Coordinator. Coordinators are instructed to contact an Administrator-level user to perform these restricted actions.

EDIT OR DELETE ONLINE EVALUATIONS

Select "Evaluations" from Main Menu.
 Select "Online Evaluations" from Dropdown.

On the Online Evaluations page, select the blue **"View and Manage Evaluations"** tab.

- To search for the evaluation(s) select term, college, department and/or course and "Continue."

- Based on your selections, the next page will present a list of available course evaluations.
- Using the checkboxes on the far left column, select the evaluation(s) you wish to edit or delete. Once selected, click the “Edit” or “Delete” button in the top right corner of the page
- “Edit” will allow you to change the details of the evaluation (see table above).
- “Delete” will present a confirmation page that displays the evaluation(s) selected for deletion; select “Cancel” to return to the previous page or select “Confirm” to permanently delete the selected evaluations.

Manage Paper Evaluations

Administrator Permissions for Editing & Deleting Paper Evaluations

| PAPER STATUS | EDIT FORM TYPE | EDIT COURSE TYPE | EDIT ENROLLMENT | EDIT REPORTS AVAILABLE DATE | DELETE |
|--------------|----------------|------------------|-----------------|-----------------------------|----------|
| Pending | YES | YES | YES | YES | YES |
| Confirmed | YES | YES | YES | YES | YES (NO) |
| Closed | YES (NO) | YES (NO) | YES (NO) | YES (NO) | YES (NO) |

Note: *Parenthetical (NO) indicates this action is not allowable for users with the role of Coordinator. Coordinators are instructed to contact an Administrator-level user to perform these restricted actions.*

EDIT OR DELETE PAPER EVALUATIONS

Select “Evaluations” from Main Menu.

Select “Paper Evaluations” from Dropdown.

On the [Paper Evaluations](#) page, select the blue “**View Cover Sheet Requests**” tab.

- To search for the evaluation(s) select term, college, department and/or course and “Continue.”
- Based on your selections, the next page will present a list of available course evaluations.
- Using the checkboxes on the far left column, select the evaluation(s) you wish to edit or delete. Once selected, click the “Edit” or “Delete” button in the top right corner of the page
- “Edit” will allow you to change the details of the evaluation (see table above).
- “Delete” will present a confirmation page that displays the evaluation(s) selected for deletion; select “Cancel” to return to the previous page or select “Confirm” to permanently delete the selected evaluations.

Manage Midterm Course Feedback

The IASystem Administrator level user can request to have the midterm course feedback feature turned on. In the rare case, if an open, pending or closed midterm course feedback request needs to be edited or deleted, Administrators have the authority to make these changes.

Note: When you delete a midterm course feedback request, the entire feedback request and any of its responses will be deleted from your account. Exercise caution in deleting feedback requests that may have response data attached – once deleted this action cannot be undone.

There are different actions an Administrator can perform depending on the midterm feedback request status. The following sections define the actions Administrators can perform in managing midterm course feedback requests:

Note: Administrator's must contact your IASystem™ account manager or email support@iasystem.org to request this feature be turned on. Midterm Course Feedback Summary Reports are only available, and intended, as formative feedback to faculty within the IASystem Faculty portal unless otherwise requested.

Administrator Permissions for Editing & Deleting Midterm Course Feedback

| MIDTERM STATUS | EDIT FORM TYPE | EDIT OPEN DATE | EDIT CLOSE DATE | EDIT REPORTS AVAILABLE DATE | EDIT COURSE TYPE | DELETE |
|----------------|----------------|----------------|-----------------|-----------------------------|------------------|----------|
| Pending | YES | YES | YES | YES | YES | YES |
| Open | NO | NO | YES | YES | YES | YES (NO) |
| Closed | NO | NO | YES (NO) | YES (NO) | YES (NO) | YES (NO) |

Note: Parenthetical (NO) indicates this action is not allowable for users with the role of Coordinator. Coordinators are instructed to contact an Administrator-level user to perform these restricted actions.

EDIT OR DELETE MIDTERM COURSE FEEDBACK REQUESTS

Select "Midterm" from Main Menu.

Select "Midterm Feedback" from Dropdown.

On the Midterm Feedback page, select the blue "**View and Manage Midterm Feedback**" tab.

1. To search for your midterm feedback request(s) select term(s), college, department and/or course and "Continue."
2. Based on your selections, the next page will present a list of available midterm feedback requests.
3. Using the checkboxes on the far left column, select the feedback request(s) you wish to edit or delete. Once selected, click the "Edit" or "Delete" button in the top right corner of the page
4. "Edit" will allow you to change the details of the feedback request(s) (see table above).
5. "Delete" will present a confirmation page that displays the feedback request(s) selected for deletion; select "Cancel" to return to the previous page or select "Confirm" to permanently delete the selected midterm course feedback request.

Access Faculty Portal as any Instructor

Act As Faculty

In order to assist instructors, the Administrator can “Act As” any instructor via the IASystem™ faculty portal. When a user with the role of Administrator accesses their institution’s faculty portal they can enter an instructor’s username and enter the Faculty Portal as that instructor.

1. Navigate to your campus IASystem™ faculty portal URL directly or select the Faculty Portal Link in the administrative interface help menu.
2. When the IASystem™ faculty portal web page opens, login information is displayed in the top right corner of the web page.
3. Administrators, or custom roles that include the “Act as Faculty” action, can enter a faculty username in the text input box and select the “Act As” button to enter the faculty portal as that user.
4. Once logged in as a particular instructor, an Administrator will see the Instructor’s name displayed with their own information below in parentheses.

HELP

[USER GUIDE](#)

[RELEASE NOTES](#)

[FACULTY PORTAL LINK](#)

LOGGED IN AS

Demo User ([logout](#))

[Act As](#)

LOGGED IN AS

Deborah Smith ([logout](#))

(Admin: Demo User)

Note: By default, only users with the IASystem™ role of Administrator have the “Act As Faculty” privilege. Administrators can assign this privilege to other users by creating a Custom Role.