School of Graduate Studies

Delivering an Innovative Approach to Academic Advisement

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Thursday February 16th, 2017

Session: J4

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Agenda

1. About the School of Graduate Studies
2. What is Academic Advisement?
3. Using Academic Advisement for Graduate Students
4. Project Approach
5. Requirement Gathering
6. Configuration
7. Testing
8. Implementation (Go-Live)
9. Maintenance
10. Limitations
11. Benefits
12. Future Opportunities

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Introduction

Implementation Team for Academic Advisement:

Lara Santosuosso – Business Analyst, School of Graduate Studies (lsantos@mcmaster.ca)

Julie Birch – Records Supervisor, School of Graduate Studies (birchj@mcmaster.ca)

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About The School Of Graduate Studies

The School of Graduate Studies at McMaster provides a centralized role to graduate program offices covering a full range of services including: admissions, advisement, course scheduling, curriculum, records, and scholarships.

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About The School Of Graduate Studies

- **Graduate Programs -** McMaster's School of Graduate Studies offers many graduate programs across six faculties.
- In 2004 we offered approximately 90 different programs of study, by 2016 this had increased and we now have over 200 different programs.

- **Number of Students -** Over 4,600 graduate students (approximately 1575 Ph.D. students and 3111 Masters students)

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What is Academic Advisement?

- Academic Advisement is used as a tool to audit degree requirements.
- Administrators and students can use the report as a visual guide to track the completion of degree requirements.
- Students can see, in real-time, where they stand against their career requirements.
- The reports have been built to reflect degree requirements as outlined in the School of Graduate Studies Calendar.

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What is Academic Advisement?

- **Academic Advisement is separated into two parts:**

  1. Configuration of requirements into the system using the appropriate pages.

  2. Analysis of student data against the requirements in order to report degree progress (see session C2).

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PeopleSoft Academic Advisement PeopleBooks
https://docs.oracle.com/cd/E29376_01/hrcs90r5/eng/psbooks/lsaa/book.htm

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Using Academic Advisement For Graduate Students

- Historically, there was no official way to track where a student was in their curriculum.
- Graduate students have a diverse set of curriculum requirements, which the legacy system did not have the capacity to support.
- In March 2015, McMaster University went live with an enterprise-wide implementation of PeopleSoft, known as Mosaic.

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Using Academic Advisement For Graduate Students

- Undergrad used this functionality in PeopleSoft and it proved to be a beneficial tool for students, faculty, and staff.
- The School of Graduate Studies wanted to investigate if this tool would yield positive results for graduate students as well.
- With the changing nature of graduate programs, we required a robust tool that would allow for flexibility in illustrating program requirements.

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Project Approach

- Used a project management style similar to AGILE.
- Used a “fail-fast” approach.
- Configured in small blocks to quickly identify and resolve any issues, as well as adapt to any initial feedback.
- This method allowed us to catch any major issues earlier in the set-up process.

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Requirement Gathering

- Met with undergrad to understand their process for configuration, implementation, and maintenance of their reports.
- Training sessions with undergrad to learn the basic configuration steps.
- Researched to understand the details of user programmable pieces that could be used for graduate studies
  - Focusing on non-course curriculum requirements (i.e. milestones, seminars, internships).

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Requirement Gathering

- Began to conceptualize ways to set up requirements, listed in the School of Graduate Studies Academic Calendar, based on the functionality available.
- We wanted to translate these requirements into an easy to read advisement report that outlined both course based and non-course based curriculum.
- Each program/plan has a unique set of requirements.
- It was important to ensure that these were accounted for during requirement gathering.

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Configuration

- The Academic Advisement module is a delivered functionality.
- This module consists mainly of configuration.
- We implemented this module without customizations to ensure optimal performance.
- It was important to configure the advisement reports in a way that captured the specific requirements of each program/plan combination.

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Configuration

Academic Advisement configuration is unique to each Program/Plan combination and is comprised of three main components:

1. ***Course Lists:***
   - Consists of specific courses that will be used to satisfy specific course requirements outlined by the Program.

2. ***Academic Requirements:***
   - Consists of course lists (Program specific) as well as any additional degree requirements, such as milestones (Non-course curriculum requirements).

3. ***Requirement Groups:***
   - Consists of academic requirements for the specific plan as well as any additional career requirements that are to be met.

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Configuration

1. School of Graduate Studies Required Course List

- All reports will have a School of Graduate Studies Required Course List, consisting of SGS 101/201 as well as a disclaimer outlining the roles and responsibilities of the student.

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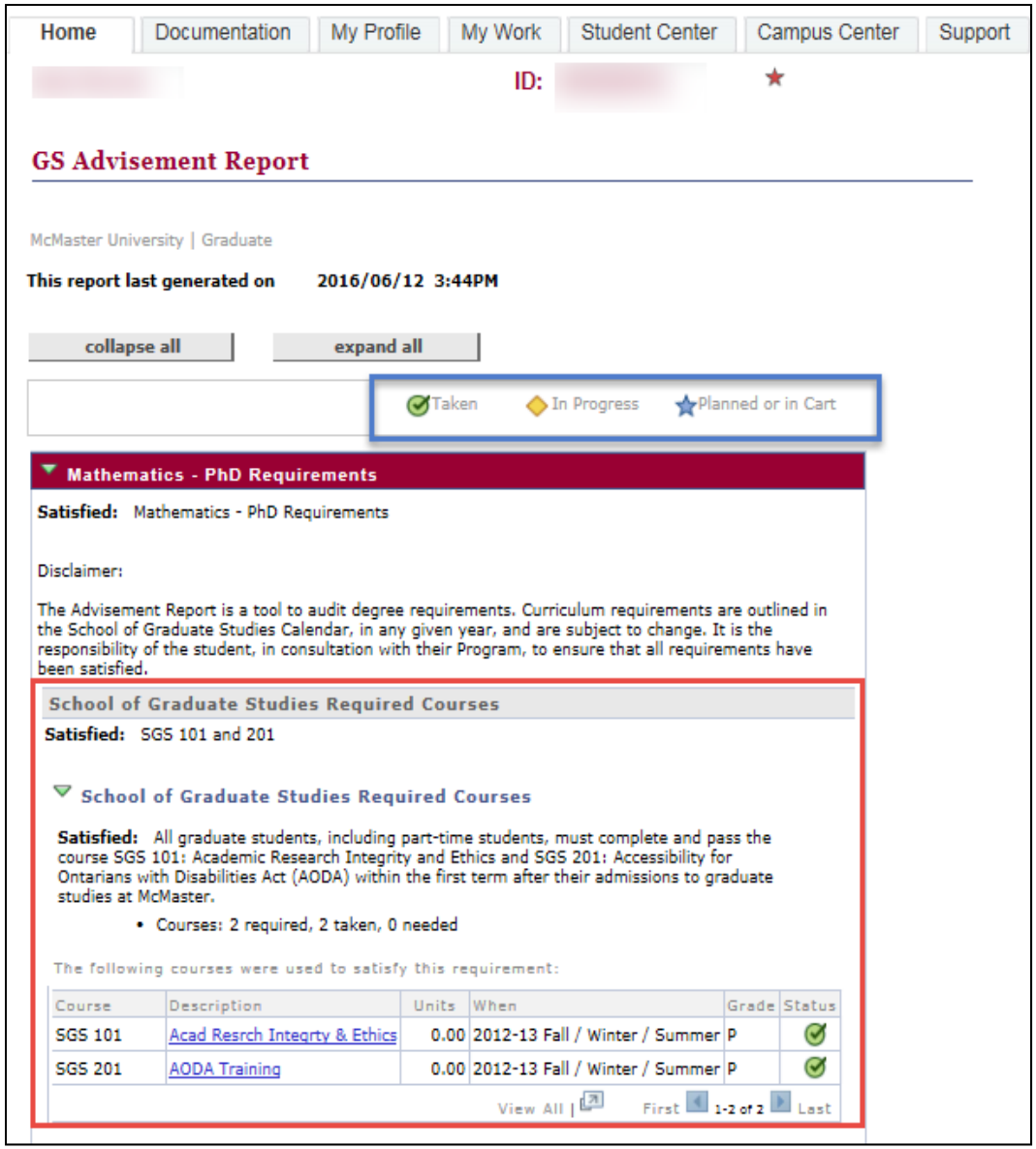
Configuration



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Configuration

2. *Program/Plan Specific Requirements*

- Plan specific courses and milestones will appear in this section.
- Any exclusions/waivers will also appear if they have been indicated.

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Configuration

Course	Description	Units	When	Grade	Status
SGS 101	Acad Resrch Integrty & Ethics	0.00	2012-13 Fall / Winter / Summer	P	
SGS 201	AODA Training	0.00	2012-13 Fall / Winter / Summer	P	

View All | First 1-2 of 2 Last

GRADADV-Mathematics (PhD)

Satisfied: Mathematics - PhD Required Courses

Graduate Mathematics Course List

Satisfied: Two courses required from list.

- Courses: 2 required, 2 taken, 0 needed

The following courses were used to satisfy this requirement:

Course	Description	Units	When	Grade	Notes	Status
STATS 741	Estimation Theory	0.00	2012-13 Fall / Winter / Summer	A+	02	
STATS 743	Foundations/Stats	0.00	2012-13 Fall / Winter / Summer	A+	01	

View All | First 1-2 of 2 Last

Comprehensive Exam Milestone

Satisfied: All candidates are required to pass the comprehensive exam consisting of a written exam testing breadth of knowledge, and one additional oral exam testing depth of knowledge in the proposed field of study.

- **Satisfied:** Comprehensive Exam

Thesis Milestone

Satisfied: Candidates present and defend, in an oral examination, a thesis written under the supervision of a faculty member containing original research.

- **Satisfied:** Thesis

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Configuration

3. Additional Elective Courses

- Additional Elective Course lists will appear if the student has taken any extra courses or courses outside of the Program course list.

- Any failed courses or multi-term courses (i.e. Part A, B, and C) will also appear in this section.

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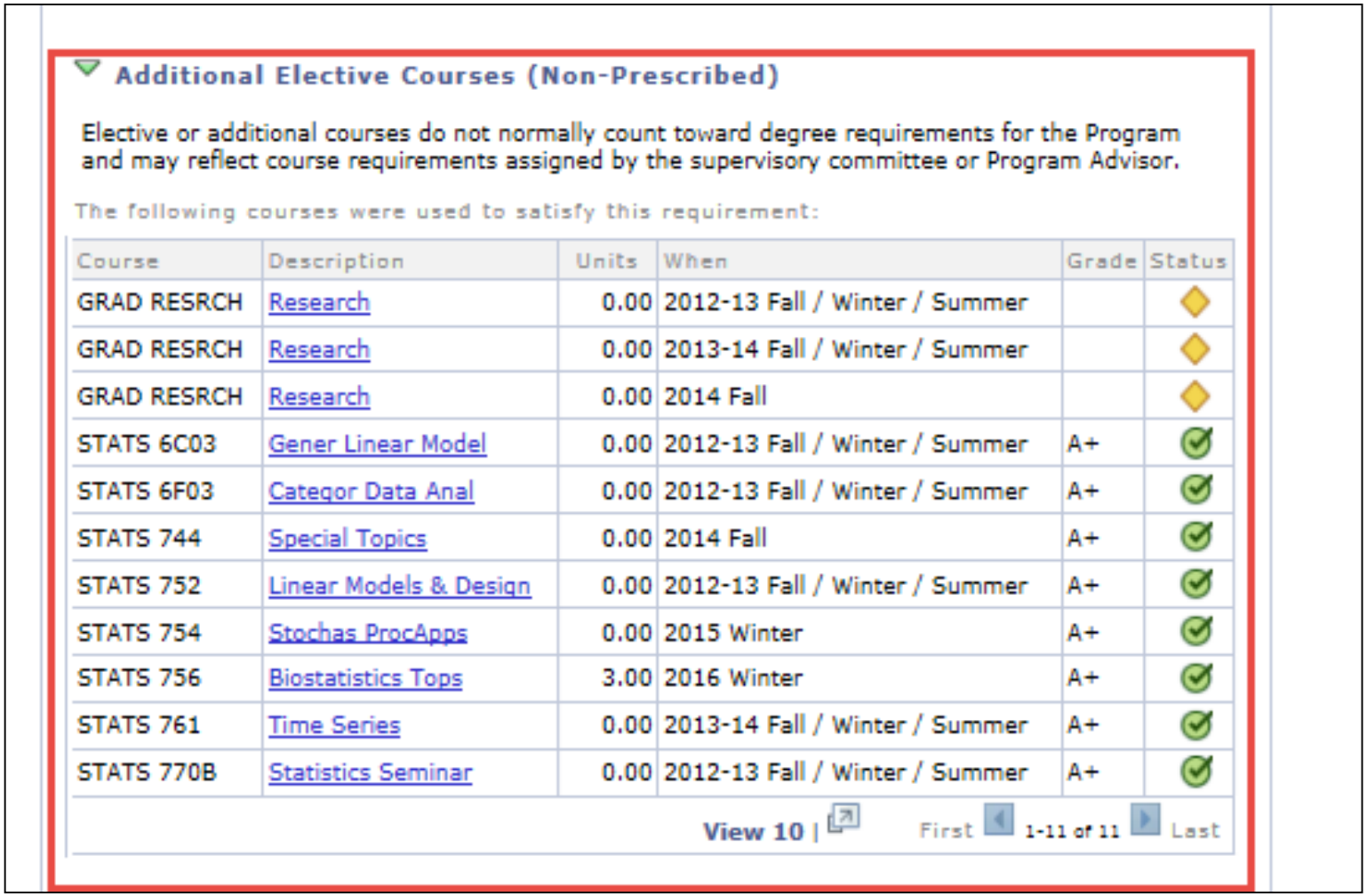
Configuration



Additional Elective Courses (Non-Prescribed)

Elective or additional courses do not normally count toward degree requirements for the Program and may reflect course requirements assigned by the supervisory committee or Program Advisor.

The following courses were used to satisfy this requirement:

Course	Description	Units	When	Grade	Status
GRAD RESRCH	Research	0.00	2012-13 Fall / Winter / Summer		
GRAD RESRCH	Research	0.00	2013-14 Fall / Winter / Summer		
GRAD RESRCH	Research	0.00	2014 Fall		
STATS 6C03	Gener Linear Model	0.00	2012-13 Fall / Winter / Summer	A+	
STATS 6F03	Categor Data Anal	0.00	2012-13 Fall / Winter / Summer	A+	
STATS 744	Special Topics	0.00	2014 Fall	A+	
STATS 752	Linear Models & Design	0.00	2012-13 Fall / Winter / Summer	A+	
STATS 754	Stochas ProcApps	0.00	2015 Winter	A+	
STATS 756	Biostatistics Tops	3.00	2016 Winter	A+	
STATS 761	Time Series	0.00	2013-14 Fall / Winter / Summer	A+	
STATS 770B	Statistics Seminar	0.00	2012-13 Fall / Winter / Summer	A+	

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Configuration

4. Excluded Courses

- Excluded courses will appear for courses that do not count toward the curriculum requirements (i.e. SGS 700).

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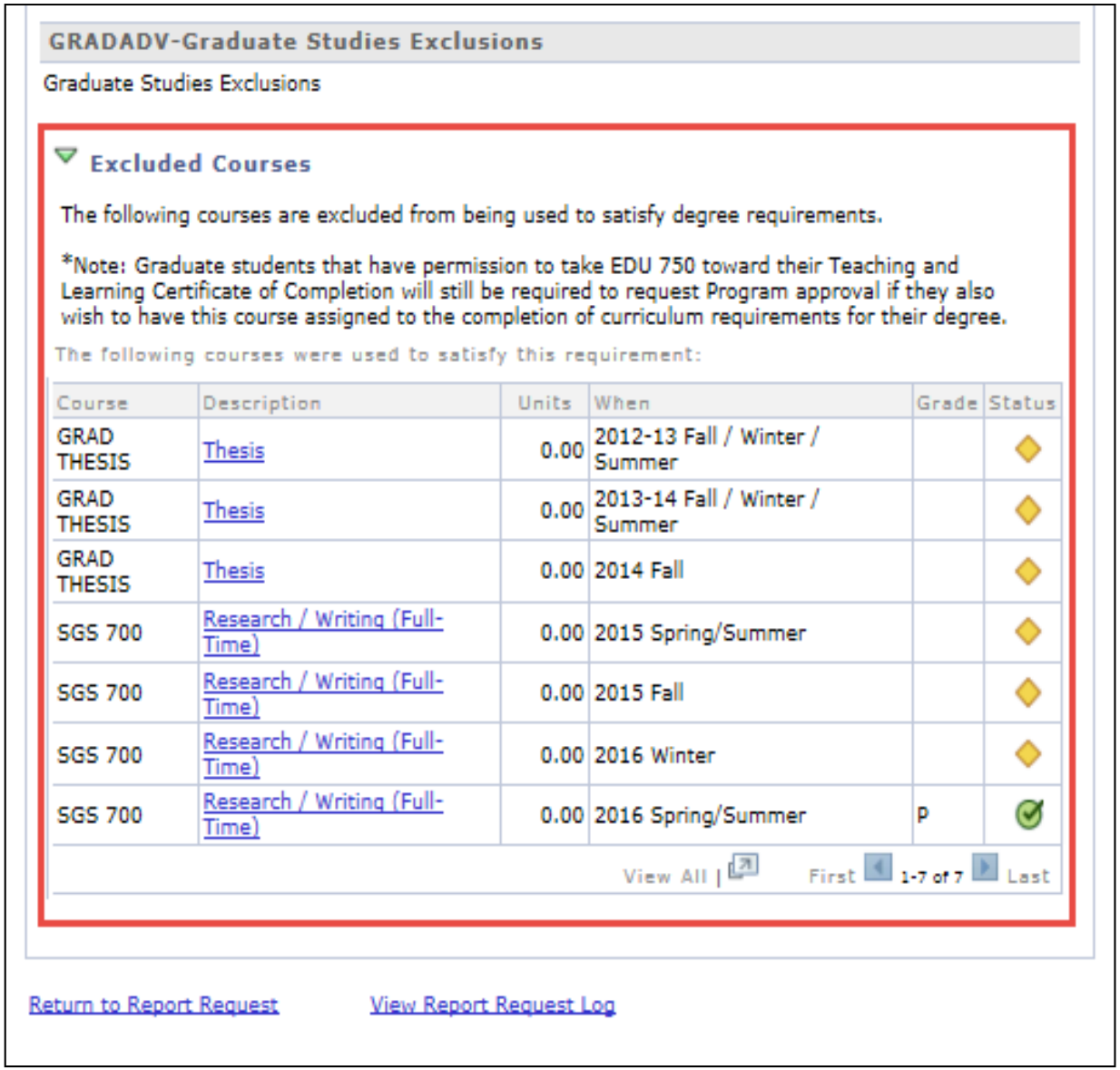
Configuration



GRADADV-Graduate Studies Exclusions

Graduate Studies Exclusions

Excluded Courses

The following courses are excluded from being used to satisfy degree requirements.

*Note: Graduate students that have permission to take EDU 750 toward their Teaching and Learning Certificate of Completion will still be required to request Program approval if they also wish to have this course assigned to the completion of curriculum requirements for their degree.

The following courses were used to satisfy this requirement:

Course	Description	Units	When	Grade	Status
GRAD THESIS	Thesis	0.00	2012-13 Fall / Winter / Summer		
GRAD THESIS	Thesis	0.00	2013-14 Fall / Winter / Summer		
GRAD THESIS	Thesis	0.00	2014 Fall		
SGS 700	Research / Writing (Full-Time)	0.00	2015 Spring/Summer		
SGS 700	Research / Writing (Full-Time)	0.00	2015 Fall		
SGS 700	Research / Writing (Full-Time)	0.00	2016 Winter		
SGS 700	Research / Writing (Full-Time)	0.00	2016 Spring/Summer	P	

View All | First 1-7 of 7 Last

Return to Report Request View Report Request Log

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Testing

- Approximately six weeks of testing and refining the reports prior to go-live.
- We ran reports for each program/plan combination for students in various phases of their graduate career.
- Test scenarios included:
  - New admits
  - In-progress students
  - Masters to PhD promotion
  - Masters and diploma (concurrent)
  - Previous students (undergraduate, CCE)
  - Students with sub-plans (i.e. Astrobiology)
  - Students with data from the legacy system

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Testing

- During initial testing, we cross-referenced with the Graduate Calendar to ensure all the information was consistent.

- Focused on:
  - Calendar language
  - Description of degree requirements
  - Required/Elective Course lists
  - Milestone details/descriptions

- Ensured combined courses were accounted for as much as possible in each course list to prevent inaccurate reports for students, particularly those in interdisciplinary programs.

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Implementation (Go-Live)

- **Individual Program Sessions**
  - Met with each program administrator individually to review configuration for the program/plans they are responsible for.
  - Used these sessions to meet with graduate chairs and advisors to demo the reports.
  - Made any adjustments to course lists/ plan specific language in order to get sign-off to go-live with the advisement reports.

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Implementation (Go-Live)

- **Labs**
  - We invited Graduate Chairs and graduate administrators to attend informal lab sessions in order to provide a high-level overview of the advisement reports.
  - Administrators tested the reports and ensured they had the proper security access to run the reports.
  - Administrators were also able to review any suggested edits made that were outlined in the individual sessions.

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Implementation (Go-Live)

- **Post-Go Live Support**
  - Set up a generic email account in order to provide administrators with a central point of contact.
  - Added training guides and reference documents to the Graduate Studies website for administrators and students to access.

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Maintenance

- **Curriculum Updates (Annually)**
  - The School of Graduate Studies may be unique as curriculum development flows through the central office.
  - As curriculum changes are approved, we are notified and update the necessary requirements with effective dated rows.
  - Updating the curriculum requirements ensures that students are seeing the degree requirements that align with their applicable admit and requirement term.

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Maintenance

- **New Program Development (Annually)**
  - As new graduate programs are introduced at McMaster University, academic advisement is also taken into consideration in new program creation.
  - When a new program has been approved, we work to configure the reports to encompass the new program and its curriculum requirements.
  - This process is similar to our curriculum update process.

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Maintenance

- **Course Directives/Waivers**
  - In some cases, students take courses outside of their prescribed program course lists.
  - Through service requests, the records team is able to manage these requests.
  - The individual advisement reports are updated to reflect these approved courses.
  - In special cases, degree requirements can be waived as per program approval and will appear as waived on the advisement report.

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Limitations

- Converted data from legacy
- Courses (from legacy) converted to Milestones (in PeopleSoft)
- Programs that require both units and number of courses to be satisfied for degree completion
- Courses taken outside of the prescribed course list

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Benefits

- Using delivered PeopleSoft functionality yielded successful results as no technical issues have been encountered.
- There is high end-user satisfaction and an increasing uptake in users.
- We were able to create a tool that can track non-course degree requirements (i.e. seminars and career planning reports)
- All maintenance and updates can be handled within the central office.

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Benefits

- Provides students with a self-service tool that is in real time and can be accessed at any time online through their student portal.
- Administrators, faculty, and staff can view exactly what the student views.
- Significantly reduces end of term/clear to graduate processing times.

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Benefits

- It provides a quick way for supervisors to review, with the student, their progress within the program in real time.
- Faculty can easily access this report remotely through Mosaic.
- The reports have been built with the flexibility to accommodate curriculum as it becomes more innovative and dynamic.

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Future Opportunities

- **New Functionality**
  - PeopleSoft is constantly evolving as updates and new functionality is always being introduced.
  - Going forward we hope to continue to further evolve our advisement reports using new functionality that is introduced.
- **PhD Go-Live**
  - We are currently in the process of testing advisement reports for PhD plans.

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Questions?

Thank You!

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