

Department Management System User Guide

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1. Introduction

The Department Management System (DMS) for the Computer Science, Mathematics, Physics, and Statistics (CMPS) department is a responsive web application designed to revolutionize how our department manages instructor activities, ultimately enhancing the quality of student experiences.

1.1 Purpose

The DMS serves as a centralized platform for managing and visualizing crucial information related to instructor activities, including:

- Teaching assignments
- Service roles and contributions
- Performance metrics

By consolidating this data, the DMS aims to increase visibility and efficiency across the department, enabling data-driven decision-making and optimizing resource allocation.

1.2 Key Benefits

For Department Head and Staff

- Comprehensive Overview: Access up-to-date information on instructor service and teaching assignments in one place.
- Performance Tracking: Utilize past performance data to make informed decisions on allocating instructors to teaching and service roles.
- Insightful Reporting: Identify trends, issues, and high-performing instructors through tailored reports and analytics to help to optimize the distribution of workload and responsibilities among faculty members.

For Instructors

- Streamlined Data Entry: Easily record and update service roles and view teaching assignments.
- Performance Visualization: Access clear, motivating visualizations of current performance.
- Goal Tracking: Monitor progress towards service hour targets.

1.3 Key Features

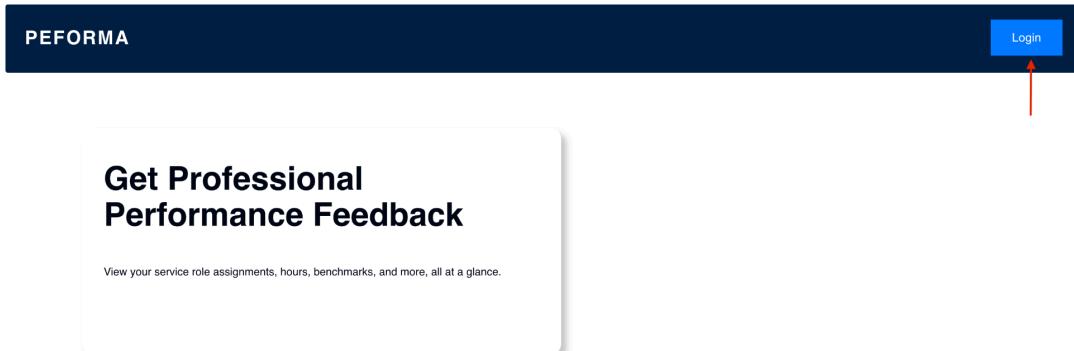
1. Secure Login System: Role-based access ensures data privacy and appropriate permissions.
2. Intuitive Dashboard: Quick-glance reporting and analytics for efficient information retrieval.
3. Flexible Database Design: Supports the addition of new metrics and service roles as departmental needs evolve.
4. Performance Motivation Tools: Comparative benchmarks and visualizations to encourage high performance.
5. Customizable Reporting: Generate reports tailored to departmental needs for identifying performance trends.
6. Data Integration: Incorporates various data sources, including enrollment and student experience instruction (SEI) data.

The Department Management System is designed with ease of use and maintainability in mind, catering primarily to desktop users. By providing a user-friendly interface and valuable insights, the DMS aims to become an indispensable tool for both department administration and instructors, fostering a more efficient, transparent, and high-performing academic environment.

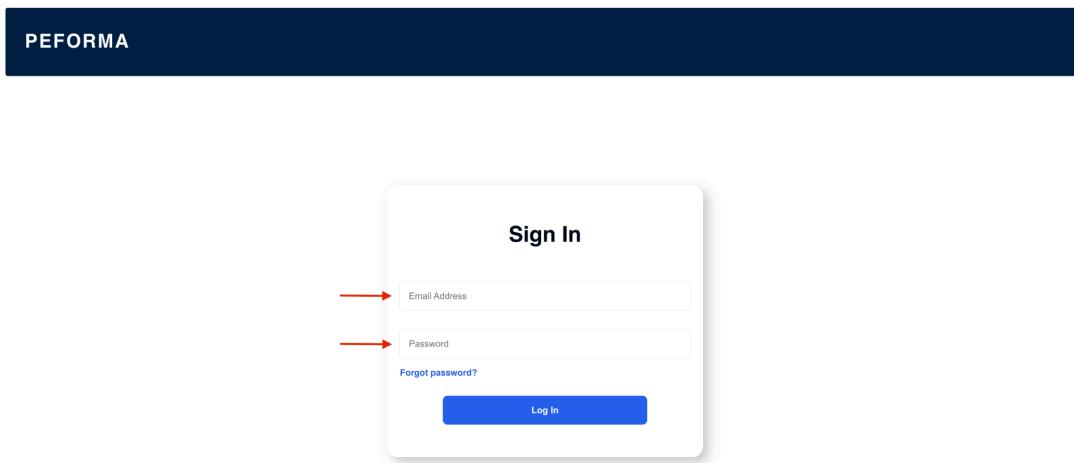
2. Getting Started

2.1 Logging In

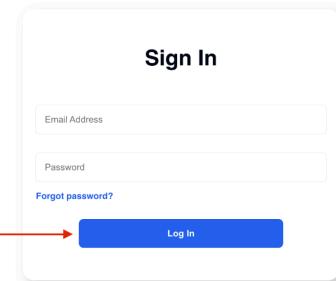
1. Open your web browser. Navigate to the Department Management System login page and click on the login button.



2. Enter your email and password.



3. Click the "Log In" button.



Note: If you've forgotten your password, refer to section 6.2 for instructions on resetting it.

2.2 Dashboard Overview

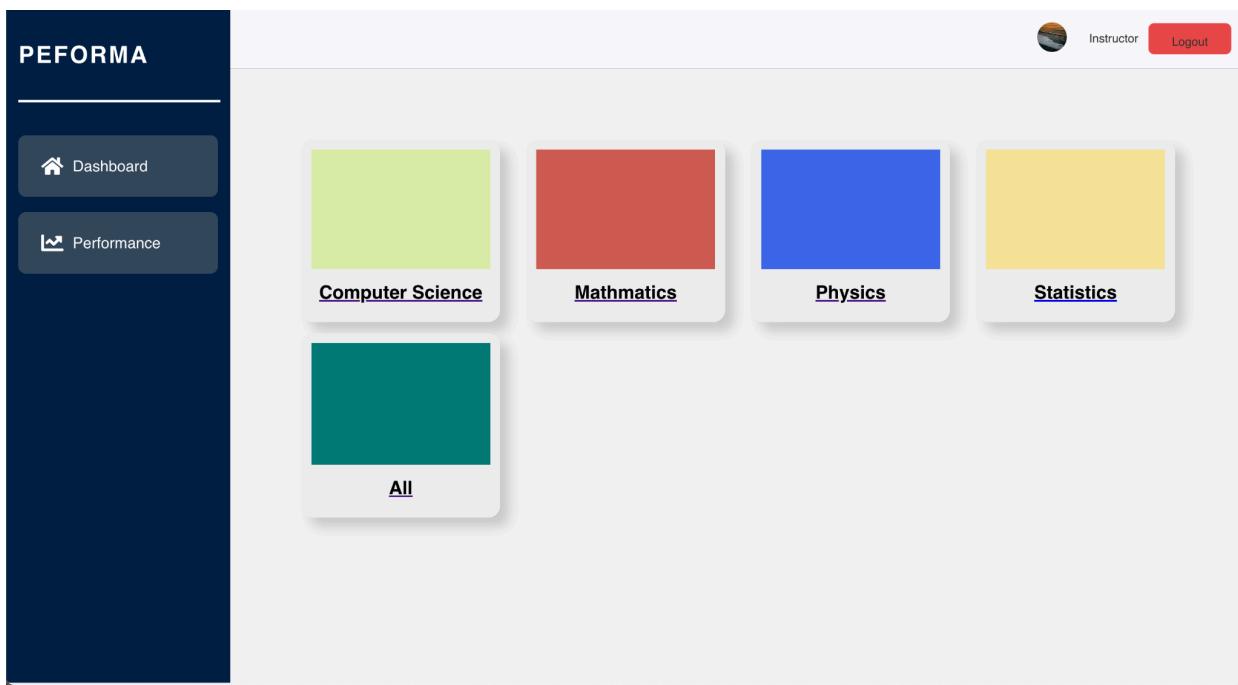
Department Head/Staff

The screenshot shows the PEFORMA dashboard interface for Department Head/Staff. On the left is a dark sidebar with white icons and text for navigating various functions. The main area is a light gray grid of cards, each with a title and a brief description. The cards are arranged in two rows of four. The top row includes 'Performace' (View department performance information), 'Teaching Assignment' (View teaching assignment for current term), 'Manage Courses' (View and edit course information), and 'Manage Service Roles' (View and edit service role information). The bottom row includes 'View Members' (View and edit various instructor profiles), 'Creation' (Create a new course or service role through manual input or spreadsheet imports), 'SEI Data Entry' (Evaluate course and instructor), and 'Meeting log' (Export today's meeting).

As a Department Head/Staff member, your dashboard provides comprehensive management options:

1. Term Selection: At the top of the main area, use the dropdown menu to select the current term (e.g., "2024 Summer Term 2").
2. Dashboard Cards: The main area displays several cards with different functionalities:
 - a. Performance: View department teaching performance summary and service hour shortages.
 - b. Teaching Assignment: View teaching assignments for the current term.
 - c. Manage Courses: View and edit course information.
 - d. Manage Service Roles: View and edit service role information.
 - e. View Members: View user profiles and edit instructor teaching assignments, service role assignments, and service hour benchmarks..
 - f. Creation: Create a new course or service role through manual input or spreadsheet imports.
 - g. SEI Data Entry: Create a new SEI survey response through manual input or spreadsheet imports..
 - h. Meeting log: Export or import meeting information.
3. To access any of these functions, click on the corresponding card.

Instructors



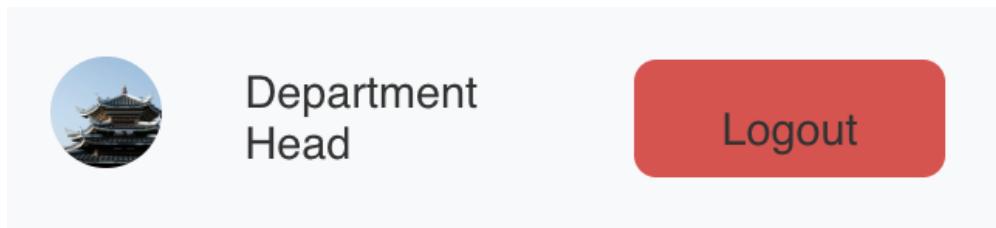
When you log in as an Instructor, your dashboard will display the following:

1. Subject Area Cards:
 - Computer Science
 - Mathematics
 - Physics
 - Statistics
 - All
2. To view courses currently offered for a specific subject area, click on the corresponding card.
3. To see courses currently offered in all subject areas, click on the "All" card.

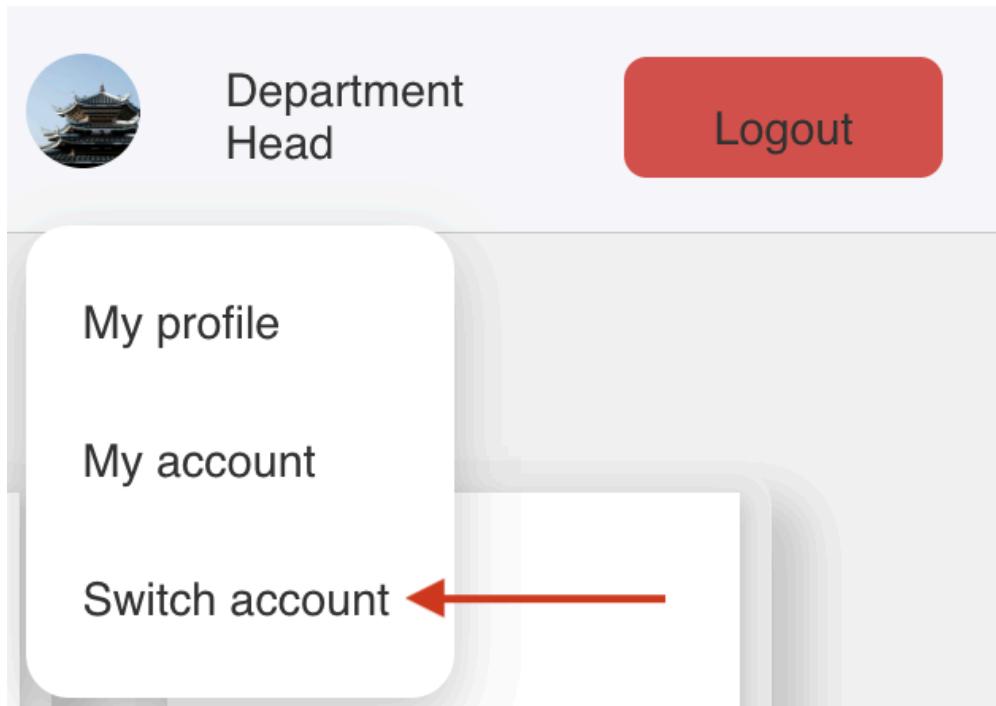
2.3 Switching Account Types

If you have multiple roles (e.g., both Department Head and Instructor):

1. Click on your profile picture in the top-right corner of the page.



2. Select "Switch Account" from the dropdown menu.



3. Choose the desired account type from the submenu.



Department
Head

Logout

← Back

Department
Head

Instructor

3. For Department Head and Staff

3.1 Managing Courses

Viewing List of Courses

1. Go to the "Courses" page by clicking on the “Course” button on the navigation bar or the “Manage Courses” card.

The screenshot shows the PEFORMA application interface. On the left is a dark sidebar with white text and icons, containing the following items:

- Dashboard
- Performance
- Teaching Assignment
- Course** (highlighted with a red border)
- Service Roles
- Member
- Create New Course/Role

At the bottom of the sidebar, it says "localhost:3000/DeptPerformancePage".

The main area contains several cards arranged in a grid:

- Performance**: View department performance information.
- Teaching Assignment**: View teaching assignment for current term.
- Manage Courses** (highlighted with a red border): View and edit course information. (This card is specifically highlighted.)
- Manage Service Roles**: View and edit service role information.
- View Members**: View and edit various instructor profiles.
- Creation**: Create a new course/service role/import files.
- SEI Data Entry**: Evaluate course and instructor.
- Meeting Log**: Export today's meeting.

The top right corner of the main area shows the text "2024 Summer Term 2", a user profile icon, "Department Head", and a "Logout" button.

2. Browse the list of all courses offered by the department in the current term.

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Search by Subject (e.g. COSC 111), Title (e.g. Computer Programming I)

Department Head Logout

List of Courses (40 Active in current)

Course	Title	Description	Status
COSC 111	Computer Programming I	Introduction to the design, implementation, and understanding of computer programs. Topics include problem solving, algorithm design, and data and procedural abstraction, with emphasis on the development of working programs.	Inactive
COSC 121	Computer Programming II	Advanced programming in the application of software engineering techniques to the design and implementation of programs manipulating complex data structures.	Inactive
COSC 211	Machine Architecture	Organization and design of computer systems and their impact on the practice of software development. Instruction set architecture and assembly programming languages; design of central processing units (CPU), memory hierarchy and cache organization, input and output programming.	Inactive
COSC 221	Discrete Structures in Computing	Discrete structures in computing and relevant mathematical techniques. Logic and applications in automated reasoning and programming; proof techniques and analysis of algorithms and computation models; graph theory and graph models in computing; counting principles and discrete probability.	Active
COSC 222	Data Structures	Introduction to the design, implementation and analysis of data structures. Topics will include lists, stacks, queues, trees, and graphs.	Active
COSC 301	Introduction to Data Analytics	Software development and techniques for computation, analysis, and visualization of data. Manipulation of small and large data sets. Automation using scripting.	Active
COSC 303	Numerical Analysis	Numerical techniques for basic mathematical processes and their analysis. Taylor polynomials, root-finding, linear systems, eigenvalues, approximating derivatives, locating minimizers, approximating integrals, solving differential equations.	Active

Viewing/Editing Course Information

- From the course list, click on the course you would like to view/edit.
- Click the "Edit Course" button.

PERFORMA

2024 Summer Term 2

Department Head Logout

< Back to Previous Page

COSC 221: Discrete Structures in Computing

Discrete structures in computing and relevant mathematical techniques. Logic and applications in automated reasoning and programming; proof techniques and analysis of algorithms and computation models; graph theory and graph models in computing; counting principles and discrete probability.

Average Performance Score: 0

Assigned Instructors for 2024 Summer Term 2 (Future): N/A

Assigned TA(s) for 2024 Summer Term 2 (Future):
- David John Wilson, david.wilson@student.ubc.ca

Edit Course **Assign Instructor(s)**

Course History

Instructor	Session	Term	Performance Score
There are no past instructors for this course.			

- The display will change to an editable form. Make any desired changes to your information in the course description field.

The screenshot shows the PERFORMA application interface. On the left is a dark sidebar with white icons and text for 'Dashboard', 'Performance', 'Teaching Assignment', 'Course' (which is selected and highlighted in blue), 'Service Roles', 'Member', and 'Create New Course/Role'. The main content area has a light background. At the top, it says '2024 Summer Term 2' with dropdown menus for 'Department Head' and 'Logout'. Below that is a blue button '< Back to Previous Page'. The main title is 'COSC 221: Discrete Structures in Computing'. A red box highlights the course description: 'Discrete structures in computing and relevant mathematical techniques. Logic'. Below the description is a green button 'Average Performance Score: 0'. The next section says 'Assigned Instructors for 2024 Summer Term 2 (Future): N/A'. Underneath is 'Assigned TA(s) for 2024 Summer Term 2 (Future): - David John Wilson, david.wilson@student.ubc.ca'. A blue 'Save' button is at the bottom left. To the right is a 'Course History' table with columns: Instructor, Session, Term, and Performance Score. It displays the message: 'There are no past instructors for this course.'

4. Click "Save" to update the course description.

This screenshot shows the same PERFORMA application interface as the previous one, but with changes made to the course description. The sidebar and top navigation are identical. The main content area now shows a red box around the 'Changes' field, which contains the text 'Changes'. The 'Save' button at the bottom left is highlighted with a red border. The rest of the page content, including the course title, performance score, instructor information, and course history, remains the same as in the first screenshot.

Assigning Instructors

1. Click the “Assign Instructor(s)” button..

The screenshot shows the PERFORMA interface for the COSC 222: Data Structures course. On the left is a sidebar with buttons for Dashboard, Performance, Teaching Assignment, Course, Service Roles, Member, and Create New Course/Role. The main content area displays course details: "COSC 222: Data Structures", "Introduction to the design, implementation and analysis of data structures. Topics will include lists, stacks, queues, trees, and graphs.", "Average Performance Score: 0", "Assigned Instructors for 2024 Summer Term 2 (Future): N/A", and "Assigned TA(s) for 2024 Summer Term 2 (Future): - Eve Lynn Davis, eve.davis@student.ubc.ca". Below these are "Edit Course" and "Assign Instructor(s)" buttons. A red box highlights the "Assign Instructor(s)" button. At the bottom is a "Course History" table with no data.

2. An “Assign Instructor(s)” pop-up will appear.

The screenshot shows the PERFORMA interface for the COSC 211: Machine Learning course. The sidebar and course details are similar to the previous screenshot. The "Assign Instructor(s)" button is highlighted with a red box. A modal dialog box titled "Assign Instructor(s)" is open, containing a search bar and a list of instructors with "Add" buttons next to their names. The list includes: John Doe (UBC ID: 11111111), Jane Allison Smith (UBC ID: 11111112), Robert Brown (UBC ID: 11111113), Emily Davis (UBC ID: 11111114), David Kim (UBC ID: 11111115), Sarah Lee Chen (UBC ID: 11111116), Michael Nguyen (UBC ID: 11111117), and Olivia Marie Rodriguez (UBC ID: 11111118). The "Save" button at the bottom of the dialog is also highlighted with a red box.

3. Select instructor(s) you would like to assign to the course by pressing on the “Add” button. For example, to assign John Doe, click on the “Add button” on the same row as

his name:

The screenshot shows the PEFORMA software interface. On the left is a dark sidebar with various navigation options: Dashboard, Performance, Teaching Assignment, Course, Service Roles, Member, and Create New Course/Role. The main area is titled 'COSC 222: Data Structures' and shows course details like 'Introduction to the design, implementation, and analysis of efficient data structures'. A modal window titled 'Assign Instructor(s)' is open, listing several instructors with their UBC IDs and 'Add' buttons. The 'Add' button for John Doe is highlighted with a red border.

Instructor	UBC ID	Action
John Doe	11111111	Add (highlighted)
Jane Allison Smith	11111112	Add
Robert Brown	11111113	Add
Emily Davis	11111114	Add
David Kim	11111115	Add
Sarah Lee Chen	11111116	Add
Michael Nguyen	11111117	Add
Olivia Marie Rodriguez	11111118	Add

Note: To undo the selection, click the “Remove” button.

4. Click the “Save” button to finish assigning instructor(s).

This screenshot is similar to the previous one, but the 'Add' button for John Doe has been replaced by a 'Remove' button, indicating he has been unselected. The 'Save' button at the bottom of the dialog is highlighted with a red border.

5. John Doe has been assigned to COSC 222 for the current term.

Instructor	Session	Term	Performance Score
John Doe	2024S	2	

Removing an Assignment

- Click on the “X” button beside the instructor name(s) you would like to remove. For example:

Instructor	Session	Term	Performance Score
John Doe	2024S	2	

- John Doe has been unassigned.

COSC 222: Data Structures

Introduction to the design, implementation and analysis of data structures. Topics will include lists, stacks, queues, trees, and graphs.

Average Performance Score: 0

Assigned Instructors for 2024 Summer Term 2 (Future): N/A

Assigned TA(s) for 2024 Summer Term 2 (Future):
- Eve Lynn Davis, eve.davis@student.ubc.ca

Edit Course + Assign Instructor(s)

Instructor	Session	Term	Performance Score
There are no past instructors for this course.			

Note: To assign an instructor to a course, ensure the course is active in the current term. Assigning instructor(s) to an inactive course will not make any changes to the system/database.

Activating/Deactivating a Course

- Click the edit icon on the top right corner above the course list.

Course	Title	Description	Status
COSC 111	Computer Programming I	Introduction to the design, implementation, and understanding of computer programs. Topics include problem solving, algorithm design, and data and procedural abstraction, with emphasis on the development of working programs.	Inactive
COSC 121	Computer Programming II	Advanced programming in the application of software engineering techniques to the design and implementation of programs manipulating complex data structures.	Inactive
COSC 211	Machine Architecture	Organization and design of computer systems and their impact on the practices of software development. Instruction set architecture and assembly programming languages, design of central processing units (CPU), memory hierarchy and cache organization, input and output programming.	Inactive
COSC 221	Discrete Structures in Computing	Changes	Active
COSC 222	Data Structures	Introduction to the design, implementation and analysis of data structures. Topics will include lists, stacks, queues, trees, and graphs.	Active
COSC 301	Introduction to Data Analytics	Software development and techniques for computation, analysis, and visualization of data. Manipulation of small and large data sets. Automation using scripting.	Active
COSC 303	Numerical Analysis	Numerical techniques for basic mathematical processes and their analysis. Taylor polynomials, root-finding, linear systems, eigenvalues, approximating derivatives, locating minimizers, approximating Integrals, solving differential equations.	Active

2. The “Status” column will become clickable with “Active” and “Inactive” buttons.

The screenshot shows the PEFORMA application interface. On the left is a dark sidebar with various navigation options: Dashboard, Performance, Teaching Assignment, Course, Service Roles, Member, and Create New Course/Role. The main area is titled "List of Courses (87 in Database)". It contains a table with columns: Course, Title, Description, and Status. The Status column includes two buttons: "Active" (blue) and "Inactive" (red). A red box highlights the status buttons for the first few rows. The table lists several courses such as COSC 111, COSC 121, COSC 211, COSC 221, COSC 222, COSC 301, and COSC 303, each with its title and a detailed description.

Course	Title	Description	Status
COSC 111	Computer Programming I	Introduction to the design, implementation, and understanding of computer programs. Topics include problem solving, algorithm design, and data and procedural abstraction, with emphasis on the development of working programs.	Active Inactive
COSC 121	Computer Programming II	Advanced programming in the application of software engineering techniques to the design and implementation of programs manipulating complex data structures.	Active Inactive
COSC 211	Machine Architecture	Organization and design of computer systems and their impact on the practice of software development. Instruction set architecture and assembly programming languages, design of central processing units (CPU), memory hierarchy and cache organization, input and output programming.	Active Inactive
COSC 221	Discrete Structures in Computing	Changes	Active Inactive
COSC 222	Data Structures	Introduction to the design, implementation and analysis of data structures. Topics will include lists, stacks, queues, trees, and graphs.	Active Inactive
COSC 301	Introduction to Data Analytics	Software development and techniques for computation, analysis, and visualization of data. Manipulation of small and large data sets. Automation using scripting.	Active Inactive
COSC 303	Numerical Analysis	Numerical techniques for basic mathematical processes and their analysis. Taylor polynomials, root-finding, linear systems, eigenvalues, approximating derivatives, locating minimizers, approximating integrals, solving differential equations.	Active Inactive
Databases from a user's perspective: querying with SQL, designing with ER diagrams, and using programs to analyze data. Construction of database-driven applications.			

3. Click the “Active” button to activate a course and “Inactive” button to deactivate a course. For example, to activate COSC 111 and deactivate COSC 222:

This screenshot shows the same PEFORMA application interface as the previous one, but with changes made to the status buttons. Red arrows point to the "Active" button for COSC 111 and the "Inactive" button for COSC 222, indicating they have been clicked. The rest of the interface remains the same, showing the list of courses and their details.

Course	Title	Description	Status
COSC 111	Computer Programming I	Introduction to the design, implementation, and understanding of computer programs. Topics include problem solving, algorithm design, and data and procedural abstraction, with emphasis on the development of working programs.	Active Inactive ↑
COSC 121	Computer Programming II	Advanced programming in the application of software engineering techniques to the design and implementation of programs manipulating complex data structures.	Active Inactive
COSC 211	Machine Architecture	Organization and design of computer systems and their impact on the practice of software development. Instruction set architecture and assembly programming languages, design of central processing units (CPU), memory hierarchy and cache organization, input and output programming.	Active Inactive
COSC 221	Discrete Structures in Computing	Changes	Active Inactive
COSC 222	Data Structures	Introduction to the design, implementation and analysis of data structures. Topics will include lists, stacks, queues, trees, and graphs.	Active Inactive ↑
COSC 301	Introduction to Data Analytics	Software development and techniques for computation, analysis, and visualization of data. Manipulation of small and large data sets. Automation using scripting.	Active Inactive
COSC 303	Numerical Analysis	Numerical techniques for basic mathematical processes and their analysis. Taylor polynomials, root-finding, linear systems, eigenvalues, approximating derivatives, locating minimizers, approximating integrals, solving differential equations.	Active Inactive
Databases from a user's perspective: querying with SQL, designing with ER diagrams, and using programs to analyze data. Construction of database-driven applications.			

4. Click the “Return” button to save your result.

The screenshot shows the PERFORMA application interface. On the left is a vertical sidebar with buttons for Dashboard, Performance, Teaching Assignment, Course, Service Roles, Member, and Create New Course/Role. The main area is titled "List of Courses (87 in Database)". It includes a search bar at the top. Below the search bar is a table with columns: Course, Title, Description, and Status. The table lists several courses, each with a status indicator (Active or Inactive) and a blue "Edit" button. The "Return" button in the top right corner is highlighted with a red box.

Course	Title	Description	Status
COSC 111	Computer Programming I	Introduction to the design, implementation, and understanding of computer programs. Topics include problem solving, algorithm design, and data and procedural abstraction, with emphasis on the development of working programs.	Active Inactive
COSC 121	Computer Programming II	Advanced programming in the application of software engineering techniques to the design and implementation of programs manipulating complex data structures.	Active Inactive
COSC 211	Machine Architecture	Organization and design of computer systems and their impact on the practice of software development. Instruction set architecture and assembly programming languages, design of central processing units (CPU), memory hierarchy and cache organization, input and output programming.	Active Inactive
COSC 221	Discrete Structures in Computing	Changes	Active Inactive
COSC 222	Data Structures	Introduction to the design, implementation and analysis of data structures. Topics will include lists, stacks, queues, trees, and graphs.	Active Inactive
COSC 301	Introduction to Data Analytics	Software development and techniques for computation, analysis, and visualization of data. Manipulation of small and large data sets. Automation using scripting.	Active Inactive
COSC 303	Numerical Analysis	Numerical techniques for basic mathematical processes and their analysis. Taylor polynomials, root-finding, linear systems, eigenvalues, approximating derivatives, locating minimizers, approximating integrals, solving differential equations.	Active Inactive
Databases from a user's perspective: querying with SQL, designing with TSQL and using programs to analyze data. Construction of database-driven			

5. COSC 111 is now active and COSC is now inactive.

The screenshot shows the PERFORMA application interface after changes have been made. The "List of Courses" page displays 40 active courses. The table structure is identical to the previous screenshot, but the status for specific rows has been modified. Red arrows point to the "Active" status for COSC 111 and the "Inactive" status for COSC 222 in the "Status" column.

Course	Title	Description	Status
COSC 111	Computer Programming I	Introduction to the design, implementation, and understanding of computer programs. Topics include problem solving, algorithm design, and data and procedural abstraction, with emphasis on the development of working programs.	Active ←
COSC 121	Computer Programming II	Advanced programming in the application of software engineering techniques to the design and implementation of programs manipulating complex data structures.	Inactive
COSC 211	Machine Architecture	Organization and design of computer systems and their impact on the practice of software development. Instruction set architecture and assembly programming languages, design of central processing units (CPU), memory hierarchy and cache organization, input and output programming.	Inactive
COSC 221	Discrete Structures in Computing	Changes	Active
COSC 222	Data Structures	Introduction to the design, implementation and analysis of data structures. Topics will include lists, stacks, queues, trees, and graphs.	Inactive ←
COSC 301	Introduction to Data Analytics	Software development and techniques for computation, analysis, and visualization of data. Manipulation of small and large data sets. Automation using scripting.	Active
COSC 303	Numerical Analysis	Numerical techniques for basic mathematical processes and their analysis. Taylor polynomials, root-finding, linear systems, eigenvalues, approximating derivatives, locating minimizers, approximating integrals, solving differential equations.	Active
Databases from a user's perspective: querying with SQL, designing with TSQL and using programs to analyze data. Construction of database-driven			

Note: Deactivating a course with instructor(s) and/or TA(s) assigned will remove the instructor and TA assignments.

Adding a New Course

1. On the Dashboard page, click the "Creation" button or the “Create New Course/Role” button on the navigation bar.

The screenshot shows the PEFORMA dashboard for the 2024 Summer Term 2. The left sidebar contains links for Dashboard, Performance, Teaching Assignment, Course, Service Roles, Member, and Create New Course/Role. The main area has several cards: Performance, Teaching Assignment, Manage Courses, Manage Service Roles, View Members, Create New Course/Role, SEI Data Entry, and Meeting log. The 'Create New Course/Role' button in both the sidebar and the main grid is highlighted with a red border.

2. You will be directed to the “Create New Course/Role” page.

The screenshot shows the 'Create New Course/Role' page. The left sidebar is identical to the dashboard. The main area has a title 'Create New Course/Role' and a sub-section 'Create New: Select OR Import Data'. The 'Import Data' button is highlighted with a green box.

3. Click the dropdown menu.

The screenshot shows the PEFORMA dashboard with a dark blue sidebar on the left containing various navigation options: Dashboard, Performance, Teaching Assignment, Course, Service Roles, Member, and Create New Course/Role. The main area is titled "Create New Course/Role". It features a dropdown menu labeled "Create New:" with three options: "Select", "Service Role", and "Course". A green button labeled "Import Data" with a file icon is positioned next to the dropdown. The top right corner of the screen shows the user's name "Department Head", a profile picture, and a "Logout" button.

4. Select “Course”.

This is a zoomed-in view of the "Create New Course/Role" page. The "Create New:" dropdown menu is open, showing three options: "Select", "Service Role", and "Course". The "Course" option is highlighted with a blue background. To the right of the dropdown, the text "OR" is followed by a green button labeled "Import Data" with a file icon.

5. An entry form will appear.

Create New Course/Role

Create New: Course OR Import Data 

Course Title: Enter course title

Department: Computer Science Course Code: e.g. 111

Course Description:

Describe the course

Finish

6. Once you have finished entering the inputs. Click the “Finish” button to create a new course.

Create New Course/Role

Create New: Course OR Import Data 

Course Title: Example Course

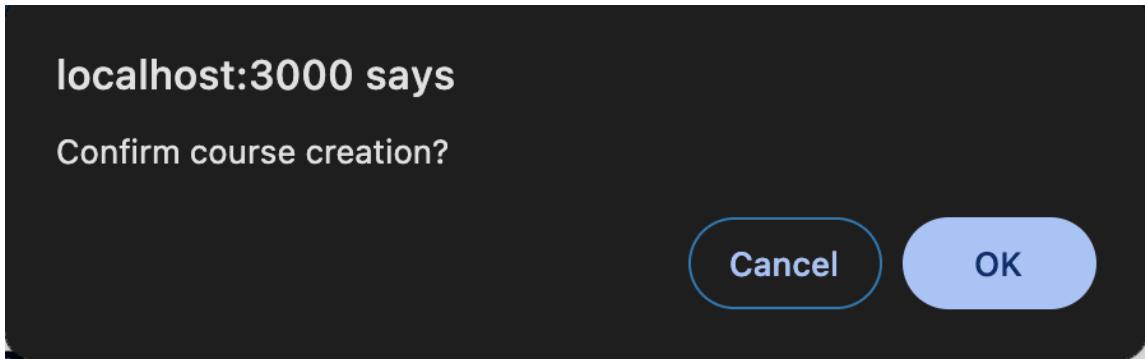
Department: Computer Science Course Code: 500

Course Description:

Example course description.

Finish

7. Click on “OK” to confirm course creation.



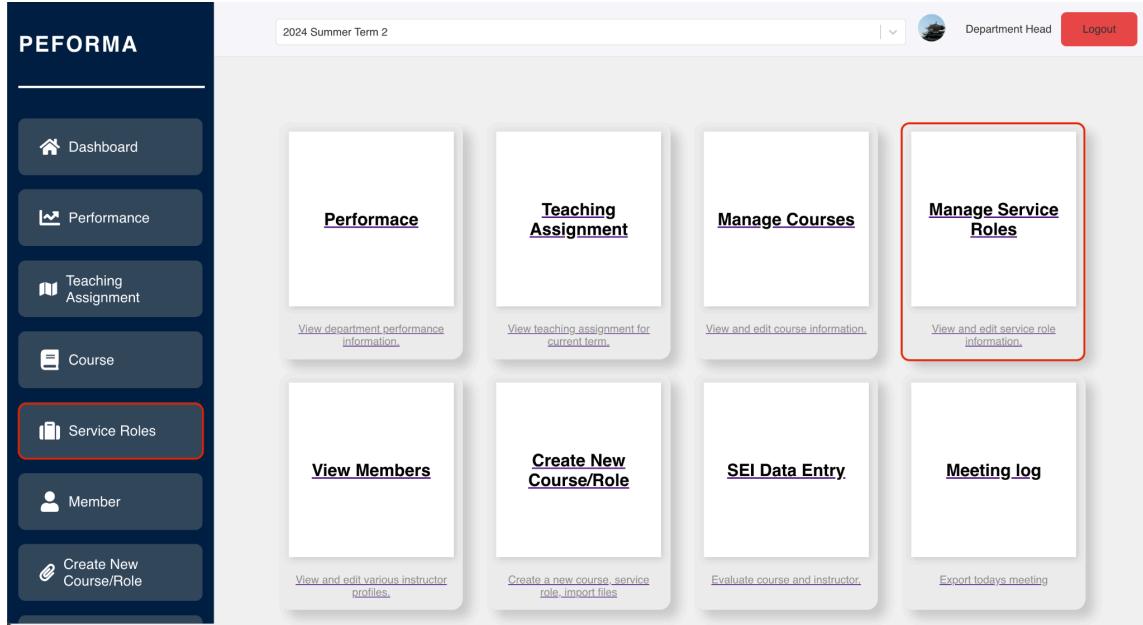
8. Your new course has been successfully created with an initial status of “inactive”.

PEFORMA			
 Dashboard	COSC 407	Introduction to Parallel Computing	Design and implementation of parallel programs including theoretical computer models, parallel architectures (distributed, multicore, GPU), and standard parallel libraries. Active
 Performance	COSC 414	Computer Graphics	Human vision and colour, modelling, geometric transformations, algorithms for 2-D and 3-D graphics, hardware and system architectures, shading and lighting, animation. Active
 Teaching Assignment	COSC 421	Network Science	Graphs and complex networks in scientific research. Probabilistic and statistical models. Structures, patterns, and behaviors in networks. Algorithmic and statistical methods (online/mobile), social networks, and social media platforms. Social influence, information diffusion, and viral marketing. Sentiment analysis and opinion mining. Data privacy. Search engines and recommendation systems. Active
 Course	COSC 441	Advanced Human Computer Interaction	Computer interaction design principles, advanced methodologies and theories; novel interfaces and platforms, conceptualization from ideation to implementation, advanced techniques for evaluation including controlled quantitative evaluation, field evaluation, quantitative analysis; introduction to HCI research. Active
 Service Roles	COSC 444	Computer Vision	Advanced vision methods that enable machines to analyze and understand images. Fundamental problems in computer vision and the state-of-the-art approaches that address them. Feature detection and matching, geometric and multi-view vision, structure from X, segmentation, object tracking and visual recognition, and deep learning methods. Active
 Member	COSC 499	Capstone Software Engineering Project	A capstone project requiring team software development for an actual client. Students must produce a comprehensive report and deliver a formal presentation. Active
 Create New Course/Role	COSC 500	Example Course	Example course description. Inactive
	MATH 101	Integral Calculus with Applications to Physical Sciences and Engineering	Definite integral, integration techniques, applications, modelling, linear ODE's. Inactive
< 1 2 3 ... 7 8 9 >			

3.2 Managing Service Roles

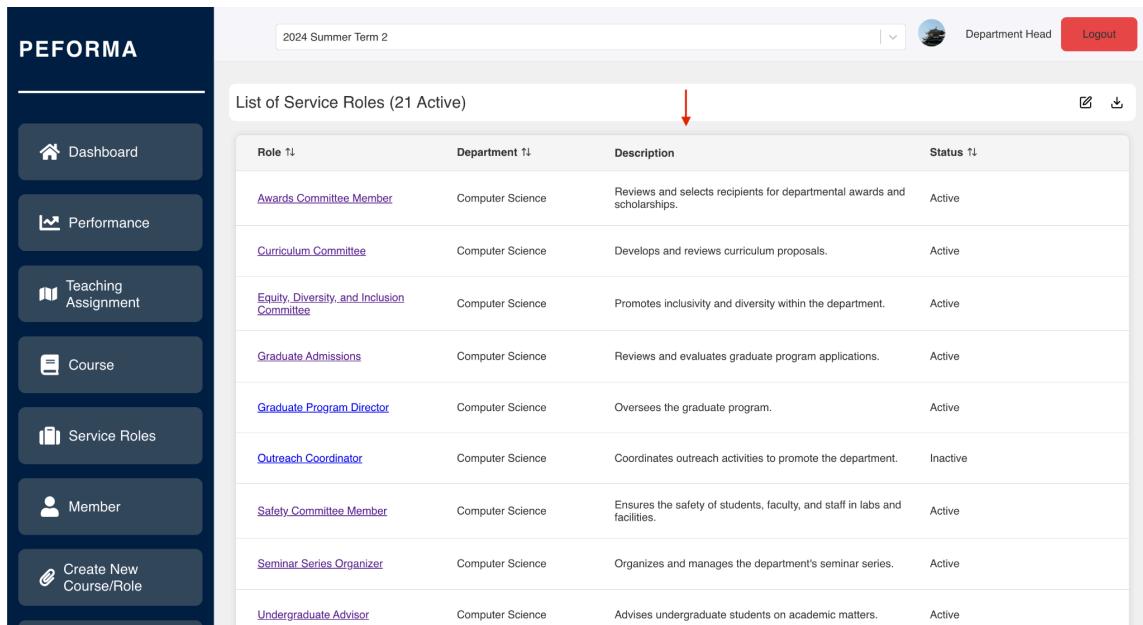
Viewing List of Service Roles

1. Go to the "Service Roles" page by clicking on the “Service Roles” button on the navigation bar or the “Manage Service Roles” card on the Dashboard.



The screenshot shows the PEFORMA dashboard. On the left, a sidebar menu lists several options: Dashboard, Performance, Teaching Assignment, Course, Service Roles (which is highlighted with a red border), Member, and Create New Course/Role. To the right, there are eight cards arranged in a grid. The fourth card from the top-left is the "Manage Service Roles" card, which is also highlighted with a red border. The other cards are: "Performance" (View department performance information), "Teaching Assignment" (View teaching assignment for current term), "Manage Courses" (View and edit course information), "View Members" (View and edit various instructor profiles), "Create New Course/Role" (Create a new course/service role - Import files), "SEI Data Entry" (Evaluate course and instructor), and "Meeting log" (Export today's meeting).

2. Browse the list of all service roles active in the department in the current year.



The screenshot shows the "List of Service Roles (21 Active)" table. The table has four columns: Role, Department, Description, and Status. An arrow points to the "Status" column. The table lists the following service roles:

Role	Department	Description	Status
Awards Committee Member	Computer Science	Reviews and selects recipients for departmental awards and scholarships.	Active
Curriculum Committee	Computer Science	Develops and reviews curriculum proposals.	Active
Equity, Diversity, and Inclusion Committee	Computer Science	Promotes inclusivity and diversity within the department.	Active
Graduate Admissions	Computer Science	Reviews and evaluates graduate program applications.	Active
Graduate Program Director	Computer Science	Oversees the graduate program.	Active
Outreach Coordinator	Computer Science	Coordinates outreach activities to promote the department.	Inactive
Safety Committee Member	Computer Science	Ensures the safety of students, faculty, and staff in labs and facilities.	Active
Seminar Series Organizer	Computer Science	Organizes and manages the department's seminar series.	Active
Undergraduate Advisor	Computer Science	Advises undergraduate students on academic matters.	Active

Viewing/Editing Service Role Information

1. From the service role list, click on the service role you would like to view/edit.
2. Click the "Edit Role" button.

The screenshot shows the PEFORMA software interface. On the left is a dark sidebar with white icons and text for Dashboard, Performance, Teaching Assignment, Course, Service Roles (which is highlighted in red), Member, and Create New Course/Role. The main content area has a header bar with '2024 Summer Term 2', a user profile icon, 'Department Head', and a 'Logout' button. Below the header is a blue button labeled '< Back to Previous Page'. The main title is 'Graduate Program Director'. A description states 'Oversees the graduate program.' The 'Department' dropdown is set to 'Computer Science (Active)'. There are two buttons at the top right: 'Edit Role' (highlighted with a red border) and 'Assign Instructor(s)'. A search bar for 'Assignees for 2024' is followed by a table with columns 'Instructor' and 'UBC ID'. A message in the table says 'There are no assigned instructors for this year'. Navigation arrows < and > are at the bottom of the table.

3. The display will change to an editable form. Make any desired changes to your information in the input fields.

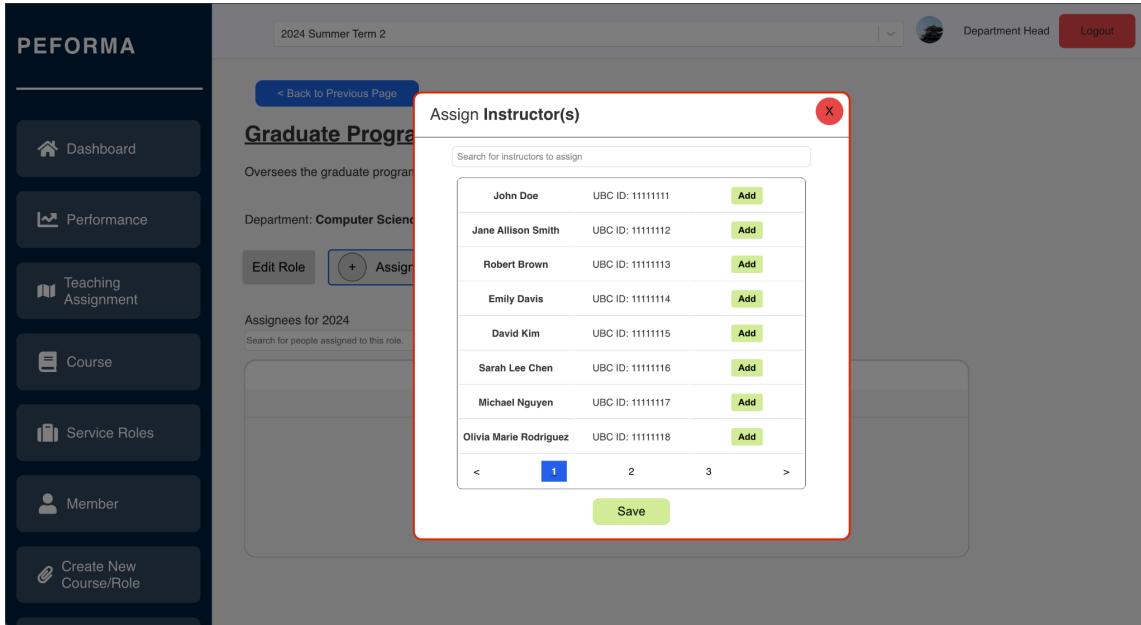
This screenshot shows the same PEFORMA interface as above, but the 'Graduate Program Director' role is now in edit mode. The 'Edit Role' button from the previous screen has been clicked, changing its appearance. The 'Oversees the graduate program.' text is now enclosed in a red rectangular box, indicating it is selected or being edited. The 'Department' dropdown is also highlighted with a red border. The 'Save' button is visible at the bottom left of the edit form.

- Click "Save" to update the input fields.

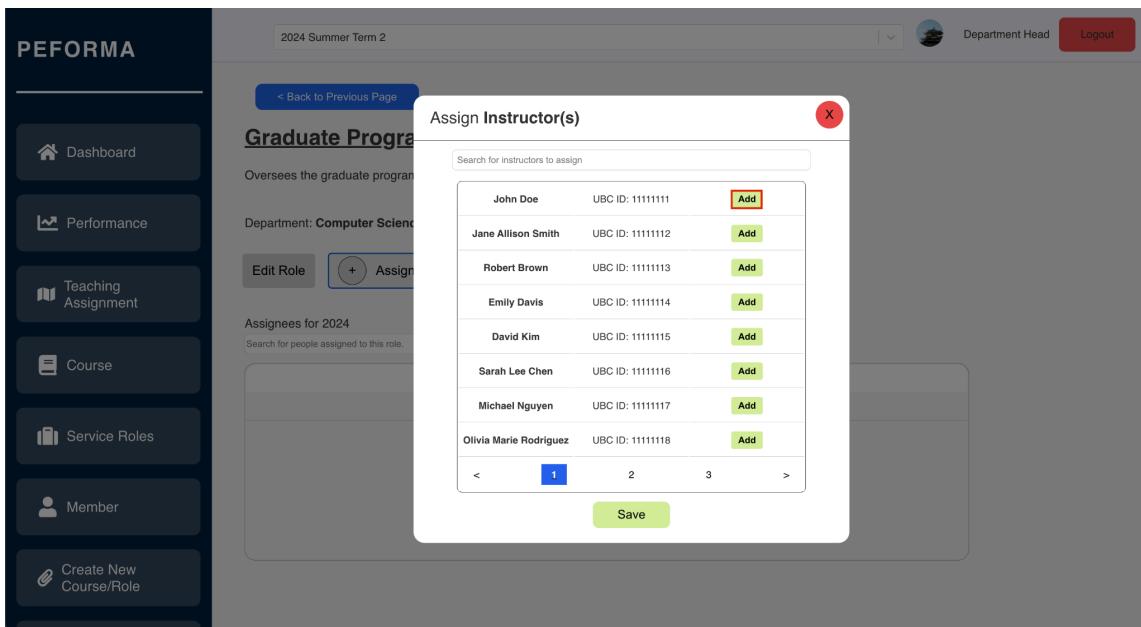
Assigning Instructors

- Click the “Assign Instructor(s)” button..

2. An “Assign Instructor(s)” pop-up will appear.



3. Select instructor(s) you would like to assign to the service role by pressing on the “Add” button. For example, to assign John Doe, click on the “Add” button on the same row as his name:



Note: To undo the selection, click the “Remove” button.

- Click the “Save” button to finish assigning instructor(s).

The screenshot shows the 'Assign Instructor(s)' dialog box overlaid on the main application window. The dialog has a search bar at the top and a list of instructors with their UBC IDs. The 'Save' button at the bottom is highlighted with a red border.

Instructor	UBC ID	Action
John Doe	11111111	Remove
Jane Allison Smith	11111112	Add
Robert Brown	11111113	Add
Emily Davis	11111114	Add
David Kim	11111115	Add
Sarah Lee Chen	11111116	Add
Michael Nguyen	11111117	Add
Olivia Marie Rodriguez	11111118	Add

- John Doe has been assigned to Graduate Program Director for the current year.

The screenshot shows the 'Graduate Program Director' page. The 'Assign Instructor(s)' section displays a table with one row, where John Doe's name and UBC ID are listed. The entire row is highlighted with a red border.

Instructor	UBC ID
John Doe	11111111

Removing an Assignment

- Click on the “X” button beside the instructor name(s) you would like to remove. For example:

The screenshot shows the PERFORMA software interface. On the left is a dark sidebar with white icons and text for 'Dashboard', 'Performance', 'Teaching Assignment', 'Course', 'Service Roles', 'Member', and 'Create New Course/Role'. The main content area has a light gray background. At the top, it says '2024 Summer Term 2' with a dropdown arrow, a user icon, 'Department Head', and a red 'Logout' button. Below that is a blue button labeled '< Back to Previous Page'. The title 'Graduate Program Director' is in bold black text, followed by the subtitle 'Oversees the graduate program.' and 'Department: Computer Science (Active)'. There are two buttons: 'Edit Role' and 'Assign Instructor(s)'. A search bar says 'Search for people assigned to this role.' Below it is a table with columns 'Instructor' and 'UBC ID'. A row shows 'John Doe' with an 'X' button, which is circled in red. An arrow points upwards from the red circle towards the 'X' button. The UBC ID is '11111111'. Navigation arrows <, 1, > are at the bottom of the table.

2. John Doe has been unassigned.

This screenshot is identical to the one above, but the table now shows a single row with a red border: 'There are no assigned instructors for this year'. The rest of the interface elements are the same.

Note: To assign an instructor to a service role, ensure the service role is active in the current year. The "Assign Instructor(s)" button does not exist for inactive service roles.

Activating/Deactivating a Service Role

- Click the edit icon on the top right corner above the service role list.

Role ↑↓	Department ↑↓	Description	Status ↑↓
Awards Committee Member	Computer Science	Reviews and selects recipients for departmental awards and scholarships.	Active
Curriculum Committee	Computer Science	Develops and reviews curriculum proposals.	Active
Equity, Diversity, and Inclusion Committee	Computer Science	Promotes inclusivity and diversity within the department.	Active
Graduate Admissions	Computer Science	Reviews and evaluates graduate program applications.	Active
Graduate Program Director	Computer Science	Oversees the graduate program.	Active
Outreach Coordinator	Computer Science	Coordinates outreach activities to promote the department.	Inactive
Safety Committee Member	Computer Science	Ensures the safety of students, faculty, and staff in labs and facilities.	Active
Seminar Series Organizer	Computer Science	Organizes and manages the department's seminar series.	Active
Undergraduate Advisor	Computer Science	Advises undergraduate students on academic matters.	Active

- The “Status” column will become clickable with “Active” and “Inactive” buttons.

Role	Department	Description	Status
Awards Committee Member	Computer Science	Reviews and selects recipients for departmental awards and scholarships.	Active Inactive
Curriculum Committee	Computer Science	Develops and reviews curriculum proposals.	Active Inactive
Equity, Diversity, and Inclusion Committee	Computer Science	Promotes inclusivity and diversity within the department.	Active Inactive
Graduate Admissions	Computer Science	Reviews and evaluates graduate program applications.	Active Inactive
Graduate Program Director	Computer Science	Oversees the graduate program.	Active Inactive
Outreach Coordinator	Computer Science	Coordinates outreach activities to promote the department.	Active Inactive
Safety Committee Member	Computer Science	Ensures the safety of students, faculty, and staff in labs and facilities.	Active Inactive
Seminar Series Organizer	Computer Science	Organizes and manages the department's seminar series.	Active Inactive
Undergraduate Advisor	Computer Science	Advises undergraduate students on academic matters.	Active Inactive

- Click the “Active” button to activate a course and “Inactive” button to deactivate a course. For example, to activate Outreach Coordinator (COSC) and deactivate Awards Committee Member (COSC):

Role	Department	Description	Status
Awards Committee Member	Computer Science	Reviews and selects recipients for departmental awards and scholarships.	Active Inactive
Curriculum Committee	Computer Science	Develops and reviews curriculum proposals.	Active Inactive
Equity, Diversity, and Inclusion Committee	Computer Science	Promotes inclusivity and diversity within the department.	Active Inactive
Graduate Admissions	Computer Science	Reviews and evaluates graduate program applications.	Active Inactive
Graduate Program Director	Computer Science	Oversees the graduate program.	Active Inactive
Outreach Coordinator	Computer Science	Coordinates outreach activities to promote the department.	Active Inactive
Safety Committee Member	Computer Science	Ensures the safety of students, faculty, and staff in labs and facilities.	Active Inactive
Seminar Series Organizer	Computer Science	Organizes and manages the department's seminar series.	Active Inactive
Undergraduate Advisor	Computer Science	Advises undergraduate students on academic matters.	Active Inactive

- Click the “Return” button to save your result.

Role	Department	Description	Status
Awards Committee Member	Computer Science	Reviews and selects recipients for departmental awards and scholarships.	Active Inactive
Curriculum Committee	Computer Science	Develops and reviews curriculum proposals.	Active Inactive
Equity, Diversity, and Inclusion Committee	Computer Science	Promotes inclusivity and diversity within the department.	Active Inactive
Graduate Admissions	Computer Science	Reviews and evaluates graduate program applications.	Active Inactive
Graduate Program Director	Computer Science	Oversees the graduate program.	Active Inactive
Outreach Coordinator	Computer Science	Coordinates outreach activities to promote the department.	Active Inactive
Safety Committee Member	Computer Science	Ensures the safety of students, faculty, and staff in labs and facilities.	Active Inactive
Seminar Series Organizer	Computer Science	Organizes and manages the department's seminar series.	Active Inactive
Undergraduate Advisor	Computer Science	Advises undergraduate students on academic matters.	Active Inactive

- Outreach Coordinator (COSC) is now active and Awards Committee Member (COSC) is now inactive.

Role ↑	Department ↑	Description	Status ↑
Awards Committee Member	Computer Science	Reviews and selects recipients for departmental awards and scholarships.	Inactive
Curriculum Committee	Computer Science	Develops and reviews curriculum proposals.	Active
Equity, Diversity, and Inclusion Committee	Computer Science	Promotes inclusivity and diversity within the department.	Active
Graduate Admissions	Computer Science	Reviews and evaluates graduate program applications.	Active
Graduate Program Director	Computer Science	Oversees the graduate program.	Active
Outreach Coordinator	Computer Science	Coordinates outreach activities to promote the department.	Active
Safety Committee Member	Computer Science	Ensures the safety of students, faculty, and staff in labs and facilities.	Active
Seminar Series Organizer	Computer Science	Organizes and manages the department's seminar series.	Active
Undergraduate Advisor	Computer Science	Advises undergraduate students on academic matters.	Active

Note: Deactivating a service role with instructor(s) assigned will remove the instructor assignments.

Adding a New Service Role

- On the Dashboard page, click the "Creation" button or the “Create New Course/Role” button on the navigation bar.

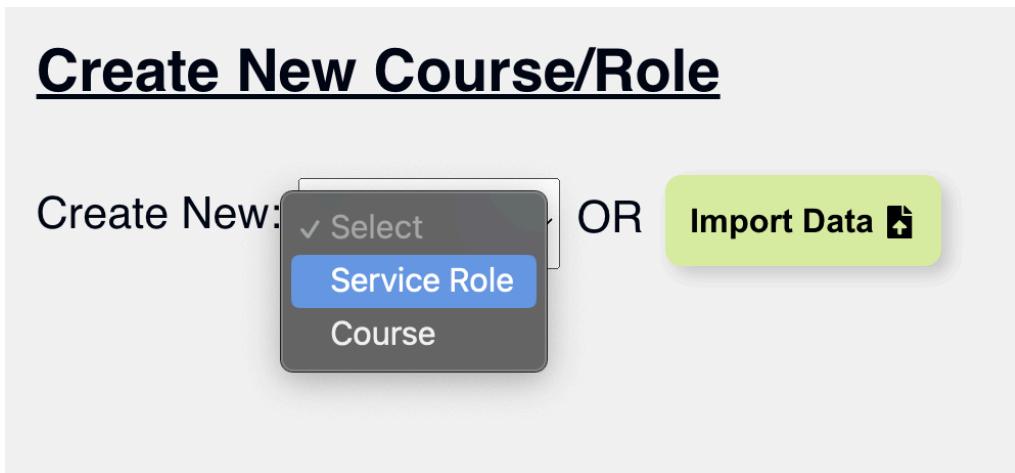
2. You will be directed to the “Create New Course/Role” page.

The screenshot shows the PEFORMA software interface. The left sidebar has a dark blue header with the word "PEFORMA" in white. Below it is a vertical list of menu items with corresponding icons: Dashboard (house), Performance (line graph), Teaching Assignment (book), Course (document), Service Roles (suitcase), Member (person), and Create New Course/Role (scissors). The main content area has a light gray background. At the top, there is a header bar with the text "2024 Summer Term 2" and a dropdown arrow. To the right of the dropdown are three buttons: a profile picture, "Department Head", and "Logout". Below the header, the title "Create New Course/Role" is displayed in bold black text. Underneath the title is a search bar with the placeholder "Create New: Select" and a dropdown arrow. To the right of the search bar is the text "OR" followed by a green button labeled "Import Data" with a small icon.

3. Click the dropdown menu.

This screenshot is identical to the one above, showing the "Create New Course/Role" page. However, the "Select" dropdown in the search bar has been highlighted with a red rectangle, indicating the user action described in step 3.

4. Select “Service Role”.



5. An entry form will appear.

The screenshot shows the "Create New Course/Role" interface with the "Service Role" option selected. The "Service Role" button is now white with black text, and the "Import Data" button is green. Below the "Create New:" section is a large white input area. This area contains fields for "Service Role" (dropdown menu), "Title" (text input field with placeholder "Enter service role title"), "Department" (dropdown menu with "Computer Science" selected), and "Service Role Description" (text area with placeholder "Describe the service role"). At the bottom of the input area is a green "Finish" button.

6. Once you have finished entering the inputs. Click the “Finish” button to create a new service role.

Create New Course/Role

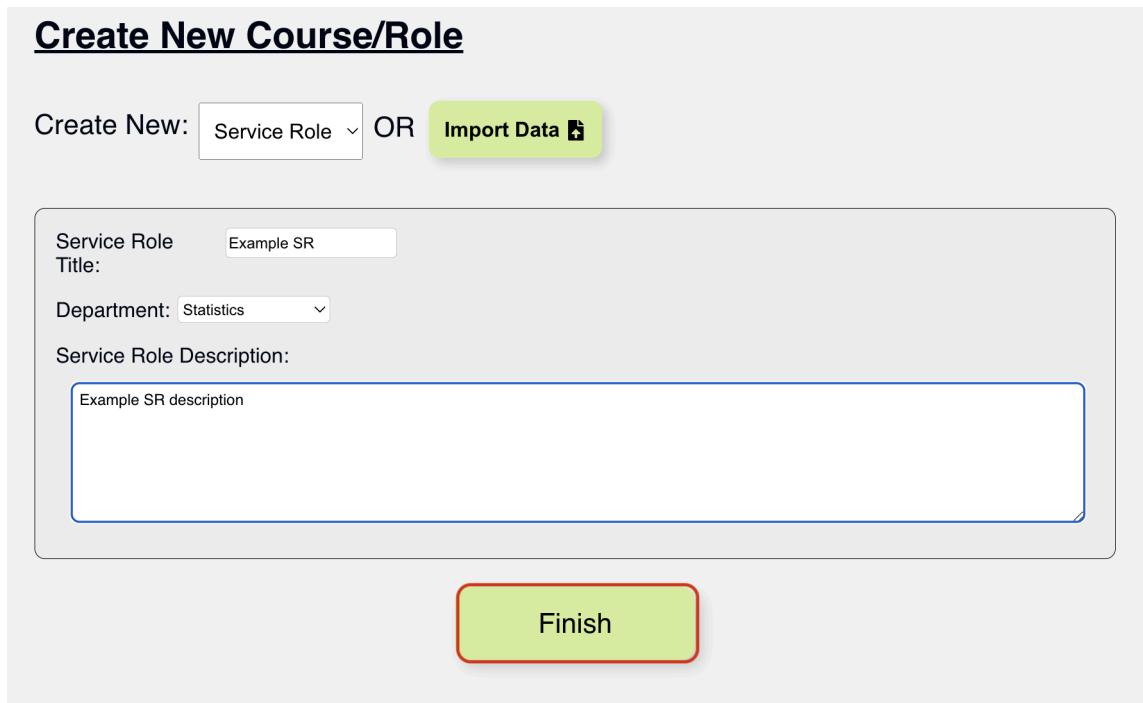
Create New: Service Role OR Import Data 

Service Role: Example SR
Title:

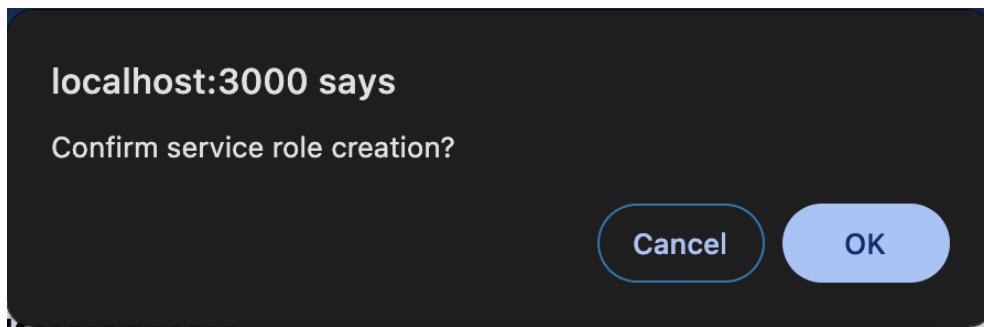
Department: Statistics

Service Role Description:
Example SR description

Finish



7. Click on “OK” to confirm course creation.



8. Your new service role has been successfully created with an initial status of “inactive”.

Role ↑↓	Department ↑↓	Description	Status ↑↓
Curriculum Committee	Mathematics	Develops and reviews curriculum proposals.	Active
Graduate Admissions	Mathematics	Reviews and evaluates graduate program applications.	Active
Graduate Program Director	Mathematics	Oversees the graduate program.	Active
Undergraduate Advisor	Mathematics	Advises undergraduate students on academic matters.	Active
Curriculum Committee	Physics	Develops and reviews curriculum proposals.	Active
Graduate Admissions	Physics	Reviews and evaluates graduate program applications.	Active
Graduate Program Director	Physics	Oversees the graduate program.	Active
Undergraduate Advisor	Physics	Advises undergraduate students on academic matters.	Active
Curriculum Committee	Statistics	Develops and reviews curriculum proposals.	Active
Example SR	Statistics	Example SR description	Inactive

< 1 2 3 >

3.3 Managing Members/Users

Viewing List of Members/Users

1. Navigate to the "Members" page by clicking on the “Member” button on the navigation bar or the “View Members” card on the Dashboard.

2024 Summer Term 2
Logout

[Performace](#)

[View department performance information.](#)

[Teaching Assignment](#)

[View teaching assignment for current term.](#)

[Manage Courses](#)

[View and edit course information.](#)

[Manage Service Roles](#)

[View and edit service role information.](#)

[View Members](#)

[View and edit various instructor profiles.](#)

[Create New Course/Role](#)

[Create a new course/service role. Import files.](#)

[SEI Data Entry](#)

[Evaluate course and instructor.](#)

[Meeting log](#)

[Export todays meeting](#)

- Browse the list of all members/users in the system.

Name ↑	UBC ID ↑	Service Role	Department ↑	Email
Sophia Anne Wilson	11111110	Undergraduate Advisor	Physics	sophia.wilson@ubc.ca
John Doe	11111111	Undergraduate Advisor Safety Committee Member	Computer Science	john.doe@ubc.ca
Jane Allison Smith	11111112	Graduate Admissions Seminar Series Organizer	Computer Science	jane.smith@ubc.ca
David Kim	11111115	Undergraduate Advisor	Mathematics	david.kim@ubc.ca
Sarah Lee Chen	11111116	Graduate Admissions	Mathematics	sarah.chen@ubc.ca
Michael Nguyen	11111117	Curriculum Committee	Mathematics	michael.nguyen@ubc.ca
Olivia Marie Rodriguez	11111118	Graduate Program Director Undergraduate Research Coordinator	Mathematics	olivia.rodriguez@ubc.ca
Daniel Taylor	11111119	Curriculum Committee	Computer Science	daniel.taylor@ubc.ca
William Anderson	12012124	Graduate Admissions	Physics	william.anderson@ubc.ca

Viewing User Information

- From the user list, click on a user's name to view their detailed profile.
- Review information such as contact details, office location, and assigned courses/service roles.

[Edit Profile](#)

Olivia Marie Rodriguez's Profile

Name: Olivia Marie Rodriguez
UBC ID: 11111118

Service Role Assignments:
- Undergraduate Research Coordinator
- Graduate Program Director

Monthly Hours Benchmark: 100

Phone Number: 250-555-7890

Email: olivia.rodriguez@ubc.ca

Office Location: ASC 456

Teaching Assignments:
- MATH 223

Service Hours:

Month	Service Hours
January	22
February	25
March	28
April	25
May	20
June	22
July	18
August	20
September	22
October	25
November	28
December	15

Note: Users with no service hour benchmark set will have “o” displayed for the “Yearly Hours Benchmark” criterion.

Assigning Course(s)

1. Navigate to the information page of the member/user you would like to assign (see 3.3 Viewing User Information).
2. Click the “Edit Profile” button.

The screenshot shows the PEFORMA software interface. On the left is a dark sidebar with white text and icons for various functions: Dashboard, Performance, Teaching Assignment, Course, Service Roles, Member, Create New Course/Role, Course Evaluation, and Meeting Log. The main area has a light gray background. At the top, there's a blue button labeled '< Back to Previous Page'. Below it, the title 'Olivia Marie Rodriguez's Profile' is displayed in bold black text. Underneath the title is a red rectangular button with the white text 'Edit Profile'. To the right of the button, the user's name 'Name: Olivia Marie Rodriguez' and UBC ID '11111118' are listed. A section titled 'Service Role Assignments:' lists 'Undergraduate Research Coordinator' and 'Graduate Program Director'. Below that, 'Monthly Hours Benchmark: 100' is shown. Further down, 'Phone Number: 250-555-7890', 'Email: olivia.rodriguez@ubc.ca', and 'Office Location: ASC 456' are listed. A 'Teaching Assignments:' section shows 'MATH 223'. The bottom part of the screenshot features a bar chart titled 'Service Hours'. The y-axis ranges from 0.0 to 30.0 in increments of 5.0. The x-axis lists dates from September 1, 2018, to October 1, 2018. Each date has a green bar representing the service hours for that day. The bars show varying heights, with some days reaching up to 25.0 hours.

3. The user's teaching assignment(s) will become editable .

4. Click the “Assign Course(s)” button.

5. An “Assign Course(s)” pop-up will appear with a list of all courses offered in the current term.

The screenshot shows the PERFORMA application's user interface. On the left is a sidebar with various navigation options: Dashboard, Performance, Teaching Assignment, Course, Service Roles, Member, and Create New Course/Role. The main area displays a user profile for "Edit Sophia". Key details shown include Name: Sophia Anne Wilson, UBC ID: 11111110, Service Role Assignments: Undergraduate Advisor, Monthly Hours Benchmark: 250-555-33, Phone Number: 250-555-33, Email: sophia.wilson@ubc.ca, Office Location: ART 235, and Teaching Assignments: PHYS 123 and PHYS 320. An "Assign Service Roles" button is also present. A modal window titled "Assign Courses(s)" is open, listing courses from COSC 221 to COSC 315. Each course row has an "Add" button. The "Add" button for COSC 221 is highlighted with a red border, indicating it is selected.

6. Select course(s) you would like to assign to the instructor by pressing on the “Add” button. For example, to assign COSC 221 to Sophia Wilson, click on the “Add” button on the same row as the course:

This screenshot is identical to the one above, showing the PERFORMA application's user interface. The sidebar and user profile for "Edit Sophia" are the same. The "Assign Courses(s)" modal is open, listing courses from COSC 221 to COSC 315. The "Add" button for COSC 221 is now highlighted with a red border, indicating it has been selected.

Note: To undo the selection, click the “Remove” button.

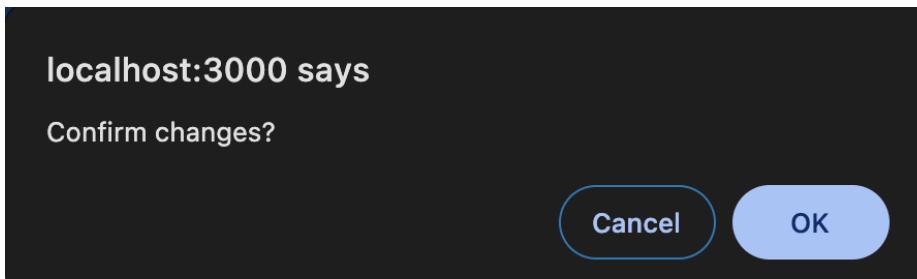
7. Click the “Save” button to finish selecting course(s).

The screenshot shows the PEFORMA application's user interface. On the left is a sidebar with various navigation options: Dashboard, Performance, Teaching Assignment, Course, Service Roles, Member, and Create New Course/Role. The main area is titled 'Edit Sophia'. It displays basic information like Name: Sophia Anne Wilson, UBC ID: 11111110, and Service Role Assignments: Undergraduate Advisor. Below this is a 'Monthly Hours Benchmark' input field set to 10. Under 'Teaching Assignments', there are three entries: COSC 221, PHYS 123, and PHYS 320, each with a red 'X' icon. A large modal window titled 'Assign Courses(s)' is overlaid. It contains a search bar and a list of courses with 'Add' and 'Remove' buttons. The courses listed are COSC 221 (Discrete Structures in Computing), COSC 222 (Data Structures), COSC 301 (Introduction to Data Analytics), COSC 303 (Numerical Analysis), COSC 304 (Introduction to Databases), COSC 305 (Project Management), COSC 310 (Software Engineering), and COSC 315 (Introduction to Operating Systems). At the bottom of the modal is a 'Save' button, which is highlighted with a red border.

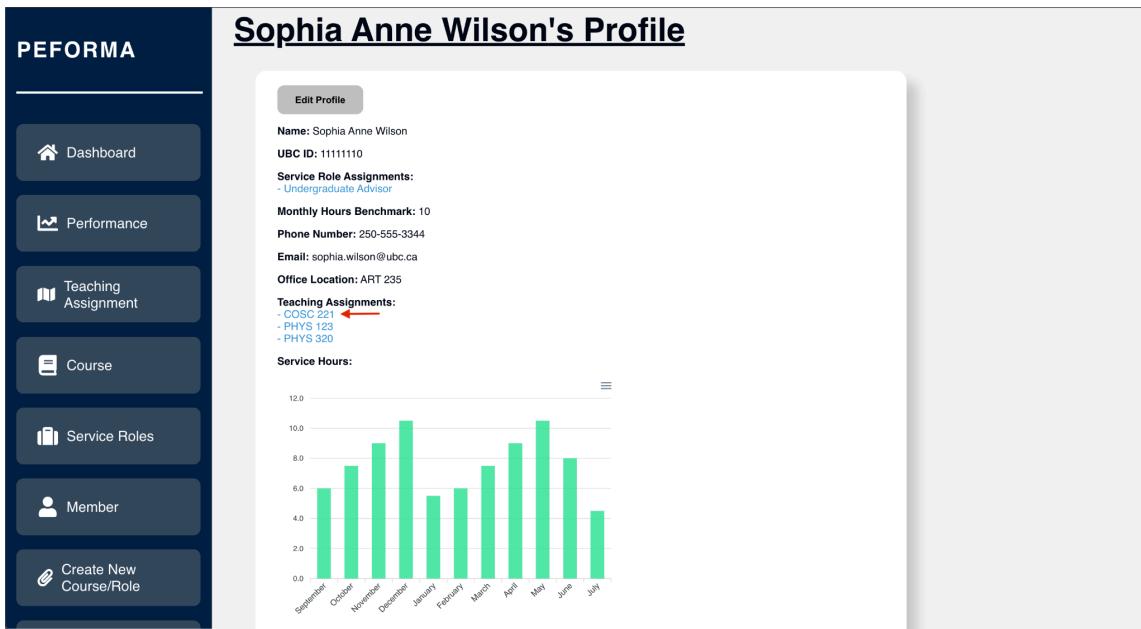
8. Click on the “Save Changes” button.

The screenshot shows the 'Edit Sophia Anne Wilson's Profile' page. The sidebar on the left is identical to the previous screenshot. The main area shows the profile details: Name: Sophia Anne Wilson, UBC ID: 11111110, Service Role Assignments: Undergraduate Advisor, Monthly Hours Benchmark: 10, Phone Number: 250-555-3344, Email: sophia.wilson@ubc.ca, Office Location: ART 235, and Teaching Assignments: COSC 221, PHYS 123, and PHYS 320. Below the teaching assignments is a 'Create New Course/Role' button. The 'Save Changes' button at the top right of the profile form is highlighted with a red border.

9. Click “OK”.



10. COSC 221 has been successfully assigned to Sophia Wilson.



Sophia Anne Wilson's Profile

Service Role Assignments:
Undergraduate Advisor

Monthly Hours Benchmark: 10
Phone Number: 250-555-3344
Email: sophia.wilson@ubc.ca
Office Location: ART 235

Teaching Assignments:

- COSC 221
- PHYS 123
- PHYS 320

Service Hours:

Month	Hours
September	~6.0
October	~7.5
November	~9.0
December	~10.5
January	~6.0
February	~6.0
March	~7.5
April	~9.0
May	~10.5
June	~8.0
July	~4.5

Removing a Teaching Assignment

1. Navigate to the information page of the member/user you would like to assign (see 3.3 Viewing User Information).

- Click the “Edit Profile” button.

Olivia Marie Rodriguez's Profile

Name: Olivia Marie Rodriguez
UBC ID: 11111111
Service Role Assignments:
- Undergraduate Research Coordinator
- Graduate Program Director
Monthly Hours Benchmark: 100
Phone Number: 250-555-7890
Email: olivia.rodriguez@ubc.ca
Office Location: ASC 456
Teaching Assignments:
- MATH 223
Service Hours:

Month	Service Hours
Jan	18.0
Feb	22.0
Mar	25.0
Apr	18.0
May	18.0
Jun	18.0
Jul	25.0
Aug	22.0
Sep	12.0

- The user's teaching assignment(s) will become editable .

Edit Sophia Anne Wilson's Profile

Name: Sophia Anne Wilson
UBC ID: 11111111
Service Role Assignments:
- Undergraduate Advisor X
Monthly Hours Benchmark: 10
Phone Number: 250-555-3344
Email: sophia.wilson@ubc.ca
Office Location: ART 235
Teaching Assignments:
- PHYS 123 X
- PHYS 320 X

- Click on the “X” button beside the course you would like to unassign. For example, to unassign PHYS 320 to Sofia Wilson, click:

Edit Sophia Anne Wilson's Profile

Name: Sophia Anne Wilson
UBC ID: 11111110
Service Role Assignments:
- Undergraduate Advisor X

Monthly Hours Benchmark: 10

Phone Number: 250-555-3344
Email: sophia.wilson@ubc.ca
Office Location: ART 235

Teaching Assignments:

- PHYS 123 X
- PHYS 320 X

+ Assign Course(s)

5. Click “Save Changes”.

Edit Sophia Anne Wilson's Profile

Name: Sophia Anne Wilson
UBC ID: 11111110
Service Role Assignments:
- Undergraduate Advisor X

Monthly Hours Benchmark: 10

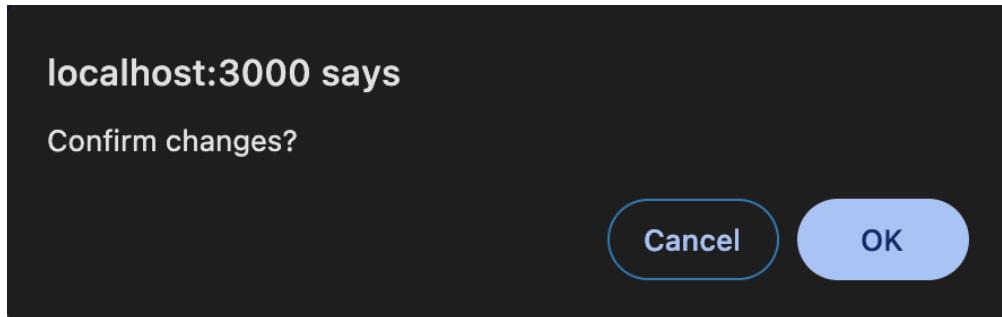
Phone Number: 250-555-3344
Email: sophia.wilson@ubc.ca
Office Location: ART 235

Teaching Assignments:

- PHYS 123 X
- PHYS 320 X

+ Assign Course(s)

6. Click “OK”.



7. PHYS 320 has been successfully unassigned.

Sophia Anne Wilson's Profile

Name: Sophia Anne Wilson
UBC ID: 1111111
Service Role Assignments:
- Undergraduate Advisor
Monthly Hours Benchmark: 10
Phone Number: 250-555-3344
Email: sophia.wilson@ubc.ca
Office Location: ART 235
Teaching Assignments:
- PHYS 123

Service Hours:

Month	Service Hours
September	~6.0
October	~7.5
November	~9.0
December	~10.5
January	~5.5
February	~6.0
March	~7.0
April	~8.5
May	~10.5
June	~8.0
July	~4.5

Assigning Service Role(s)

1. Navigate to the information page of the member/user you would like to assign (see 3.3 Viewing User Information).
2. Click the “Edit Profile” button.

The screenshot shows the PEFORMA application interface. On the left is a dark sidebar with various buttons: Dashboard, Performance, Teaching Assignment, Course, Service Roles, Member, Create New Course/Role, Course Evaluation, and Meeting Log. The main content area is titled "Olivia Marie Rodriguez's Profile". It includes a "Edit Profile" button, the user's name and UBC ID, service role assignments (Undergraduate Research Coordinator, Graduate Program Director), monthly hours benchmark (100), phone number (250-555-7890), email (olivia.rodriguez@ubc.ca), office location (ASC 456), teaching assignments (MATH 223), and service hours. A bar chart displays service hours for different months.

11. The user's service role assignment(s) will become editable .

The screenshot shows the PEFORMA application interface. The sidebar is identical to the previous screenshot. The main content area is titled "Edit Sophia Anne Wilson's Profile". It includes "Save Changes" and "Cancel Changes" buttons. The user's name and UBC ID are listed, along with service role assignments (Undergraduate Advisor). There is a "Assign Service Role(s)" button. Below it are fields for monthly hours benchmark (10), phone number (250-555-3344), email (sophia.wilson@ubc.ca), office location (ART 235), and teaching assignments (PHYS 123, PHYS 320). There is also a "Assign Course(s)" button.

12. Click the “Assign Service Role(s)” button.

13. An “Assign Role(s)” pop-up will appear with a list of all service roles active in the current year..

14. Select service role(s) you would like to assign to the instructor by pressing on the “Add” button. For example, to assign Equity, Diversity, and Inclusion Committee to Sophia Wilson, click on the “Add” button on the same row as the service role:

Edit Sophia

Name: Sophia Anne Wilson
UBC ID: 11111110
Service Role Assignments:
- Undergraduate Advisor X

Save Changes

Search for roles to assign

Equity, Diversity, and Inclusion Committee	Computer Science	Add
Graduate Admissions	Computer Science	Add
Graduate Program Director	Computer Science	Add
Outreach Coordinator	Computer Science	Add
Safety Committee Member	Computer Science	Add
Seminar Series Organizer	Computer Science	Add
Undergraduate Advisor	Computer Science	Add
Undergraduate Research Coordinator	Computer Science	Add

< 1 2 3 >

Save

Assign Course(s)

Note: To undo the selection, click the “Remove” button.

15. Click the “Save” button to finish selecting service role(s).

Edit Sophia

Name: Sophia Anne Wilson
UBC ID: 11111110
Service Role Assignments:
- Undergraduate Advisor X

Save Changes

Search for roles to assign

Equity, Diversity, and Inclusion Committee	Computer Science	Remove
Graduate Admissions	Computer Science	Add
Graduate Program Director	Computer Science	Add
Outreach Coordinator	Computer Science	Add
Safety Committee Member	Computer Science	Add
Seminar Series Organizer	Computer Science	Add
Undergraduate Advisor	Computer Science	Add
Undergraduate Research Coordinator	Computer Science	Add

< 1 2 3 >

Save

Assign Course(s)

16. Click on the “Save Changes” button.

The screenshot shows the PEFORMA application interface. On the left is a sidebar with the following menu items:

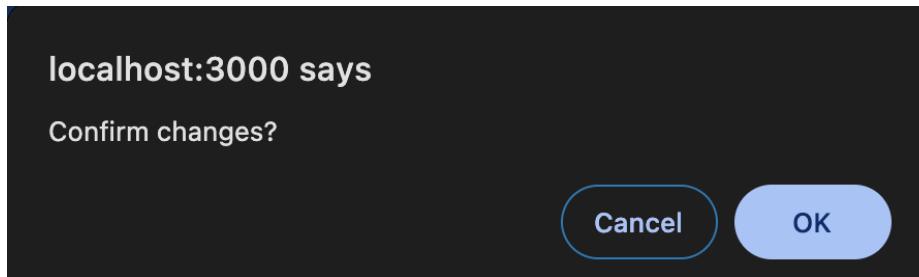
- Dashboard
- Performance
- Teaching Assignment
- Course
- Service Roles
- Member
- Create New Course/Role

The main content area is titled "Edit Sophia Anne Wilson's Profile". It displays the following profile information:

- Name: Sophia Anne Wilson
- UBC ID: 11111110
- Service Role Assignments:
 - Equity, Diversity, and Inclusion Committee X
 - Undergraduate Advisor X
- Monthly Hours Benchmark: 10
- Phone Number: 250-555-3344
- Email: sophia.wilson@ubc.ca
- Office Location: ART 235
- Teaching Assignments:
 - PHYS 123 X
 - PHYS 320 X

At the top right of the content area are two buttons: "Save Changes" (highlighted in yellow) and "Cancel Changes". Below the "Service Role Assignments" section is a button labeled "+ Assign Service Role(s)". Below the "Teaching Assignments" section is a button labeled "+ Assign Course(s)".

17. Click “OK”.



18. Equity, Diversity, and Inclusion Committee has been successfully assigned to Sophia Wilson.

Sophia Anne Wilson's Profile

Edit Profile

Name: Sophia Anne Wilson
UBC ID: 1111110
Service Role Assignments:
- Equity, Diversity, and Inclusion Committee ←
- Undergraduate Advisor

Monthly Hours Benchmark: 10
Phone Number: 250-555-3344
Email: sophia.wilson@ubc.ca
Office Location: ART 235

Teaching Assignments:
- PHYS 123
- PHYS 320

Service Hours:

Month	Service Hours
September	7.0
October	10.0
November	12.0
December	13.0
January	8.0
February	9.0
March	9.0
April	10.0
May	12.0
June	11.0
July	5.0

Removing a Teaching Assignment

8. Navigate to the information page of the member/user you would like to assign (see 3.3 Viewing User Information).
 9. Click the “Edit Profile” button.

Olivia Marie Rodriguez's Profile

Edit Profile

Name: Olivia Marie Rodriguez
UBC ID: 1111118
Service Role Assignments:
- Undergraduate Research Coordinator
- Graduate Program Director

Monthly Hours Benchmark: 100
Phone Number: 250-555-7890
Email: olivia.rodriguez@ubc.ca
Office Location: ASC 456

Teaching Assignments:
- MATH 223

Service Hours:

Month	Service Hours
September	18.0
October	22.0
November	24.0
December	28.0
January	18.0
February	19.0
March	19.0
April	20.0
May	22.0
June	22.0
July	13.0

10. The user's teaching assignment(s) will become editable .

The screenshot shows the PEFORMA application interface. On the left is a dark sidebar with the word 'PEFORMA' at the top and several buttons: 'Dashboard', 'Performance', 'Teaching Assignment', 'Course', 'Service Roles', 'Member', and 'Create New Course/Role'. The main content area has a light gray background. At the top, it says 'Edit Sophia Anne Wilson's Profile'. Below that are two buttons: 'Save Changes' (green) and 'Cancel Changes' (red). The profile information is listed: Name: Sophia Anne Wilson, UBC ID: 11111110, Service Role Assignments: Undergraduate Advisor (with a red 'X' icon), Monthly Hours Benchmark: 10, Phone Number: 250-555-3344, Email: sophia.wilson@ubc.ca, Office Location: ART 235, Teaching Assignments: PHYS 123 (with a red 'X' icon) and PHYS 320 (with a red 'X' icon). There are also 'Assign Service Role(s)' and 'Assign Course(s)' buttons.

11. Click on the “X” button beside the course you would like to unassign. For example, to unassign Undergraduate Advisor to Sofia Wilson, click:

This screenshot is identical to the one above, showing the 'Edit Sophia Anne Wilson's Profile' page. The red arrow is specifically pointing to the red 'X' icon next to the 'Undergraduate Advisor' entry under 'Service Role Assignments'.

12. Click “Save Changes”.

The screenshot shows the PEFORMA application interface. On the left is a sidebar with the following menu items:

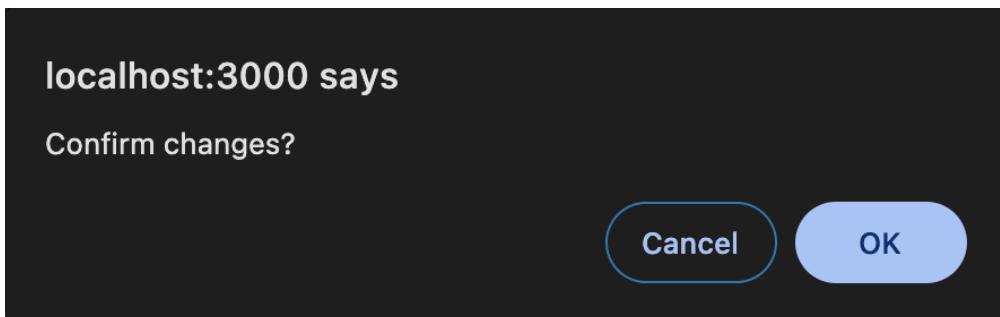
- Dashboard
- Performance
- Teaching Assignment
- Course
- Service Roles
- Member
- Create New Course/Role

The main content area is titled "Edit Sophia Anne Wilson's Profile". It contains the following information:

- Name: Sophia Anne Wilson
- UBC ID: 11111110
- Service Role Assignments: N/A
- Monthly Hours Benchmark: 10
- Phone Number: 250-555-3344
- Email: sophia.wilson@ubc.ca
- Office Location: ART 235
- Teaching Assignments:
 - PHYS 123 (X)
 - PHYS 320 (X)

At the top right of the profile edit box are two buttons: "Save Changes" (highlighted in yellow) and "Cancel Changes".

13. Click “OK”.



- Undergraduate Advisor has been successfully unassigned.

Sophia Anne Wilson's Profile

Name: Sophia Anne Wilson
UBC ID: 11111111
Service Role Assignments: N/A
Monthly Hours Benchmark: 10
Phone Number: 250-555-3344
Email: sophia.wilson@ubc.ca
Office Location: ART 235

Teaching Assignments:

- PHYS 123
- PHYS 320

Service Hours:

10
9
8
7
6
5
4
3
2
1
0

0 1 2 3 4 5 6 7 8 9 10

3.4 Managing Teaching Assignments

Viewing Teaching Assignments

- Navigate to the "Teaching Assignments" page by clicking on the "Teaching Assignment" button on the navigation bar or the "Teaching Assignment" card on the Dashboard.

2024 Summer Term 2

Department Head Logout

TEACHING ASSIGNMENT

View teaching assignment for current term.

Manage Courses

View and edit course information.

Manage Service Roles

View and edit service role information.

View Members

Create New Course/Role

SEI Data Entry

Meeting log

- On the page, you'll be able to see the courses being offered and assigned to at least once instructor and the instructor teaching courses in the current term.

PEFORMA

2024 Summer Term 2

Department Head Logout

Teaching assignment (2024 Summer Term 2)

Computer Science

Computer Science Courses:

- COSC 301: Introduction to Data Analytics
- COSC 414: Computer Graphics
- COSC 341: Human Computer Interaction
- COSC 444: Computer Vision
- COSC 404: Database System Implementation
- COSC 344: Image Processing and Applications
- COSC 406: Numerical Optimization
- COSC 310: Software Engineering
- COSC 421: Network Science
- COSC 407: Introduction to Parallel Computing

Computer Science Professors:

- John Doe
- Jane Allison Smith
- Robert Brown

- You may toggle between subject areas using the dropdown menu.

Computer Science

- To view teaching assignments in detail, click the “Detail” button.

PEFORMA

2024 Summer Term 2

Department Head Logout

Teaching assignment (2024 Summer Term 2)

Computer Science

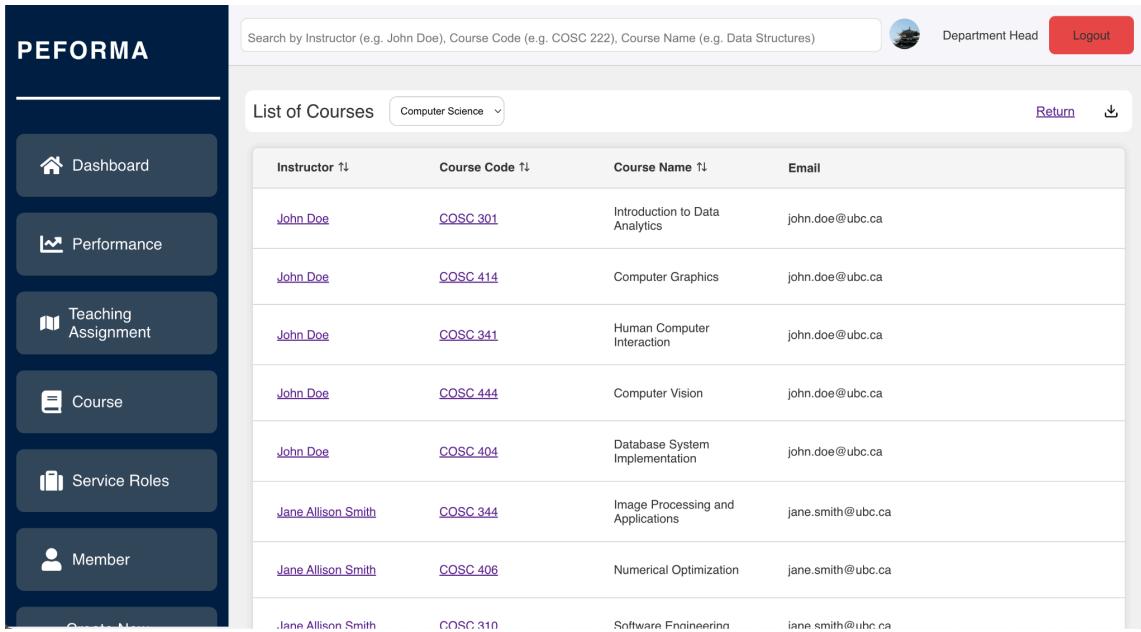
Computer Science Courses:

- COSC 301: Introduction to Data Analytics
- COSC 414: Computer Graphics
- COSC 341: Human Computer Interaction
- COSC 444: Computer Vision
- COSC 404: Database System Implementation
- COSC 344: Image Processing and Applications
- COSC 406: Numerical Optimization
- COSC 310: Software Engineering
- COSC 421: Network Science
- COSC 407: Introduction to Parallel Computing

Computer Science Professors:

- John Doe
- Jane Allison Smith
- Robert Brown

5. A list of instructors with their assigned courses will appear along with their email addresses.



The screenshot shows the PEFORMA application interface. On the left is a dark sidebar with the title 'PEFORMA' at the top. Below it are six menu items: 'Dashboard', 'Performance', 'Teaching Assignment', 'Course', 'Service Roles', and 'Member'. The main area has a light background. At the top right, there is a search bar with placeholder text 'Search by Instructor (e.g. John Doe), Course Code (e.g. COSC 222), Course Name (e.g. Data Structures)', a profile icon, 'Department Head', and a red 'Logout' button. Below the search bar is a header with 'List of Courses' and a dropdown set to 'Computer Science'. To the right of the header are 'Return' and a download icon. The main content is a table with the following data:

Instructor ↑↓	Course Code ↑↓	Course Name ↑↓	Email
John Doe	COSC 301	Introduction to Data Analytics	john.doe@ubc.ca
John Doe	COSC 414	Computer Graphics	john.doe@ubc.ca
John Doe	COSC 341	Human Computer Interaction	john.doe@ubc.ca
John Doe	COSC 444	Computer Vision	john.doe@ubc.ca
John Doe	COSC 404	Database System Implementation	john.doe@ubc.ca
Jane Allison Smith	COSC 344	Image Processing and Applications	jane.smith@ubc.ca
Jane Allison Smith	COSC 406	Numerical Optimization	jane.smith@ubc.ca
Jane Allison Smith	COSC 310	Software Engineering	jane.smith@ubc.ca

Editing Teaching Assignments

To edit teaching assignments, see [3.1 Managing Courses - Assigning Instructors](#) and [3.3 Managing Members/Users - Assigning Course\(s\)](#).

3.5 Managing Service Role Assignments

Viewing Service Role Assignments

To view service role assignments, see [3.2 Managing Service Roles - Viewing/Editing Service Role Information](#) and [3.3 Managing Members/Users - Viewing User Information](#).

Editing Teaching Assignments

To edit service role assignments, see [3.1 Managing Service Roles - Assigning Instructors](#) and [3.3 Managing Members/Users - Assigning Service Role\(s\)](#).

3.6 Managing Meetings

Adding a New Meeting

To add a new meeting, please use the import feature. For the spreadsheet format to follow for importing new meetings, please see 3.8 Importing Data - Accepted Spreadsheet Format and Update Anchor.

Exporting a Meeting

1. Navigate to the “Meeting Log” page by clicking on the “Meeting Log” button in the navigation bar or the “Meeting Log” card in the Dashboard.

The screenshot shows a user interface for managing meetings. On the left is a vertical sidebar with a dark blue background containing ten buttons, each with an icon and text: Dashboard, Performance, Teaching Assignment, Course, Service Roles, Member, Create New Course/Role, Course Evaluation, and Meeting Log. The 'Meeting Log' button is highlighted with a red border. To its right is a grid of eight cards arranged in two rows of four. The top row contains four cards: 'Performace' (with subtext 'View department performance information.'), 'Teaching Assignment' (with subtext 'View teaching assignment for current term.'), 'Manage Courses' (with subtext 'View and edit course information.'), and 'Manage Service Roles' (with subtext 'View and edit service role information.'). The bottom row contains four cards: 'View Members' (with subtext 'View and edit various instructor profiles.'), 'Create New Course/Role' (with subtext 'Create a new course, service role, import files.'), 'SEI Data Entry' (with subtext 'Evaluate course and instructor, import files.'), and 'Meeting log' (with subtext 'Export todays meeting'). The 'Meeting log' card also has a red border around its entire box. At the top of the main content area, there is a header bar with the text '2024 Summer Term 2' and a dropdown arrow, followed by a user profile icon labeled 'Department Head' and a red 'Logout' button.

2. A “Meeting Management” form will appear.

The screenshot shows the PERFORMA application interface. On the left is a dark sidebar with white icons and text for various functions: Dashboard, Performance, Teaching Assignment, Course, Service Roles, Member, Create New Course/Role, and Course Evaluation. The main area is titled "Meeting Management" and has a green "Import" button. It displays the current time as "8/8/2024 10:38:17 AM". Below that is a dropdown menu labeled "Select Meeting" with the placeholder "Select Meeting".

3. Select the meeting you would like to export.

The screenshot shows the same PERFORMA application interface as the previous one, but the "Select Meeting" dropdown is now open, displaying a list of three meetings:

- 2024-08-11 | 09:00 | ASC 215 | Computer Science course adjustment meeting
- 2024-08-10 | 14:00 | Online | Daily meeting
- 2024-08-07 | 10:00 | SCI 234 | Physics department meeting

4. Select the meeting attendees.

The screenshot shows the PERFORMA application's Meeting Management module. On the left is a sidebar with various navigation options: Dashboard, Performance, Teaching Assignment, Course, Service Roles, Member, Create New Course/Role, and Course Evaluation. The main area is titled "Meeting Management" and displays the message "Current Time: 8/8/2024 10:46:17 AM". Below this is a "Select Meeting:" dropdown set to "2024-08-11 | 09:00 | ASC 215 | Computer Science course adjustment...". A "Select Participants" dropdown shows three users: Michael Nguyen, Olivia Rodriguez, and Daniel Taylor. At the top right are "Import" and "Logout" buttons.

5. Click on “Export” button.

This screenshot is similar to the previous one but shows the "Export" button now available. The "Select Participants" dialog now lists two users: Michael Nguyen and Olivia Rodriguez. Below the dialog are "Export" and "Cancel" buttons. The rest of the interface remains the same, including the sidebar and the "Meeting Management" title.

6. Depending on your browser settings, the file will either:

- Download automatically to your default download folder
- Prompt you to choose a location to save the file

- Once downloaded, you can open the CSV file with your preferred spreadsheet application. It should look like this:

2024-08-11 Computer Science course adjustment meeting

Date	Time	Location	Title	Participants	Missing
2024-08-11	09:00	ASC 215	Computer Science course adjustment meeting	Michael Nguyen, Olivia Rodriguez	Daniel Taylor

3.7 Setting Service Hour Benchmarks

Setting/Editing Yearly Service Hour Benchmarks

- Navigate to the information page of the member/user you would like to assign (see 3.3 Viewing User Information).
- Click the “Edit Profile” button.

The screenshot shows the PEFORMA software interface. On the left is a dark sidebar with white text and icons for various functions: Dashboard, Performance, Teaching Assignment, Course, Service Roles, Member, Create New CourseRole, Course Evaluation, and Meeting Log. The main content area has a light gray background. At the top, there is a blue button labeled '< Back to Previous Page'. Below it, the title 'Olivia Marie Rodriguez's Profile' is displayed in bold black text. Underneath the title is a red-bordered 'Edit Profile' button. To the right of the button, the user's name and UBC ID are listed. Below that, under 'Service Role Assignments', there are two items: 'Undergraduate Research Coordinator' and 'Graduate Program Director'. Further down, 'Monthly Hours Benchmark' is set to 100, followed by 'Phone Number' (250-555-7890), 'Email' (olivia.rodriguez@ubc.ca), 'Office Location' (ASC 456), and 'Teaching Assignments' (MATH 223). At the bottom of the content area is a bar chart titled 'Service Hours'. The x-axis lists months from January to December. The y-axis ranges from 0.0 to 30.0. Each bar is green and represents the service hours for that month. The bars show fluctuating values throughout the year.

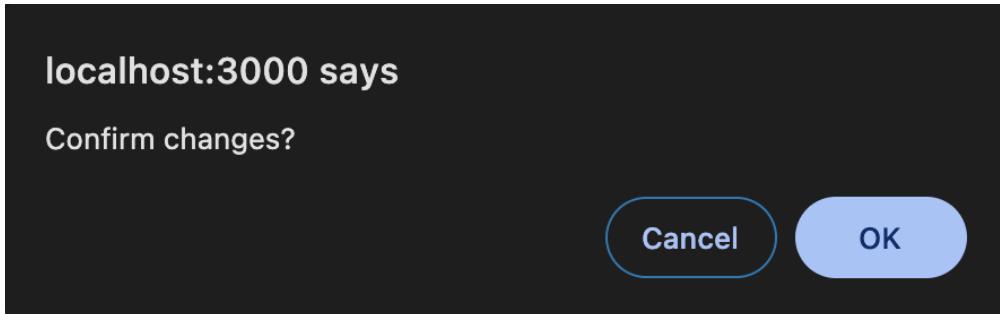
- The user’s service hour benchmark will become editable. Enter the new yearly service hour benchmark for the instructor.

The screenshot shows the PEFORMA application interface. On the left is a dark sidebar with white icons and text for 'Dashboard', 'Performance', 'Teaching Assignment', 'Course', 'Service Roles', 'Member', and 'Create New Course/Role'. The main content area has a light gray background. At the top, it says '2024 Summer Term 2' with a dropdown arrow, followed by a user icon, 'Department Head', and a red 'Logout' button. Below this is a section titled 'Edit Sophia Anne Wilson's Profile' with a green 'Save Changes' button and a red 'Cancel Changes' button. The profile details are listed: Name: Sophia Anne Wilson, UBC ID: 11111110, Service Role Assignments: Undergraduate Advisor (with a red 'X'), Monthly Hours Benchmark: 10 (with a red border), Phone Number: 250-555-3344, Email: sophia.wilson@ubc.ca, Office Location: ART 235, Teaching Assignments: PHYS 123 (with a red 'X') and PHYS 320 (with a red 'X'), and a 'Assign Course(s)' button.

4. Click "Save Changes".

This screenshot is identical to the one above, showing the 'Edit Sophia Anne Wilson's Profile' page. The only difference is that the 'Monthly Hours Benchmark' field now contains '999' instead of '10', indicating that the changes have been saved.

5. Click "OK".



6. The service hour for this instructor has been successfully updated.

Sophia Anne Wilson's Profile

Name: Sophia Anne Wilson
UBC ID: 1111110
Service Role Assignments:
- Undergraduate Advisor
Monthly Hours Benchmark: 999
Phone Number: 250-555-3344
Email: sophia.wilson@ubc.ca
Office Location: ART 235
Teaching Assignments:
- PHYS 123
- PHYS 320
Service Hours:

Month	Service Hours
September	8.0
October	9.5
November	11.5
December	12.5
January	7.0
February	6.5
March	9.0
April	11.0
May	13.5
June	10.5
July	6.0

Entering/Editing Monthly Service Hours

To enter/edit monthly service hours, see 3.8 Importing and Exporting Data - Importing Data

3.8 Creating a New SEI Entry

1. Navigate to the “Course Evaluation” page by clicking on the “Course Evaluation” button in the navigation bar or the “SEI Data Entry” card in the Dashboard.

The screenshot shows the PEFORMA application interface. On the left is a dark sidebar with white text and icons for navigation. The main area contains several cards representing different functions:

- Performace**: View department performance information.
- Teaching Assignment**: View teaching assignment for current term.
- Manage Courses**: View and edit course information.
- Manage Service Roles**: View and edit service role information.
- View Members**: View and edit various instructor profiles.
- Create New Course/Role**: Create a new course, service role, import files.
- SEI Data Entry**: Evaluate course and instructor. This card is highlighted with a red border.
- Meeting log**: Export today's meeting.

2. A “SEI Data Entry” form will appear.

The screenshot shows the “SEI Data Entry” form. At the top, there is a header with the title “SEI Data Entry” and a green “Import” button. Below the header is a dropdown menu labeled “Select Course:” with the sub-option “Select course”. The rest of the page is mostly blank, indicating where data would be entered or displayed.

3. Select the course the SEI entry is for.

The screenshot shows the PEFORMA application interface. On the left is a dark sidebar with white text and icons for various functions: Dashboard, Performance, Teaching Assignment, Course, Service Roles, Member, Create New Course/Role, and Course Evaluation. The main area is titled "SEI Data Entry". At the top right are links for "Department Head" and "Logout". A green "Import" button is located in the top right corner of the main area. Below it, a dropdown menu titled "Select Course:" lists several course codes: COSC 301, COSC 310, COSC 315, COSC 341, COSC 344, COSC 360, COSC 404, COSC 406, and COSC 407. The background of the main area is light gray.

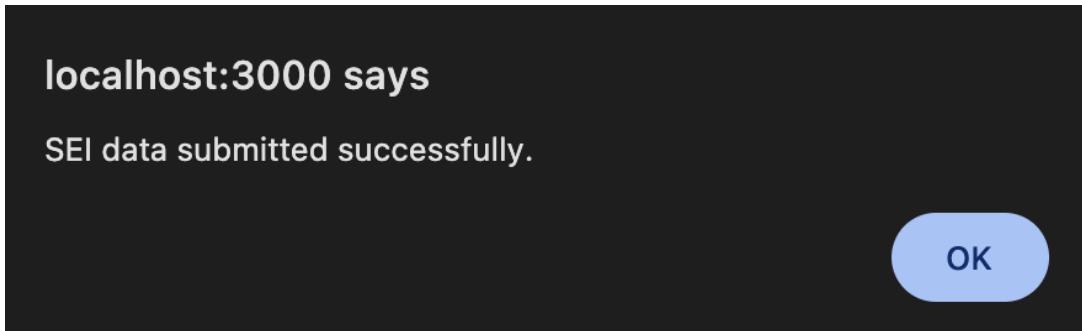
4. Select the instructor the SEI entry is for.

This screenshot is similar to the previous one, showing the PEFORMA dashboard and the "SEI Data Entry" page. The sidebar and top navigation are identical. In the main "SEI Data Entry" area, the "Select Course:" dropdown now shows "COSC 301". Below it, a new dropdown menu titled "Select Instructor:" shows a single option: "John Doe". The background remains light gray.

- Fill the form and click on the “Submit” button to create a SEI entry.

The screenshot shows the PERFORMA application interface. On the left is a sidebar with various buttons: Dashboard, Performance, Teaching Assignment, Course, Service Roles, Member, Create New Course/Role, Course Evaluation, and Meeting Log. The main area is titled "SEI Data Entry". It contains fields for "Selected Course" (COSC 301), "Select Instructor" (John Doe), and six questions (Q 1 through Q 6) each with an average score input field (all set to 10). Below these are four summary statistics: "Retention Rate of COSC 301" (10), "Average Grade of COSC 301" (10), "Enrollment Rate of COSC 301" (10), and "Failed Percentage of COSC 301" (10). At the bottom are "Submit" and "Cancel" buttons.

- A new SEI entry for the course and instructor you selected with the information you entered has been successfully created.



3.9 Analyzing Performance Data

Viewing Top Performing Courses

1. Navigate to the "Performance" page from the Dashboard by clicking on the "Performance" button on the navigation bar or "Performance" card.

The screenshot shows the PERFORMA application interface. On the left is a dark sidebar with various menu items: Dashboard, Performance (which is highlighted with a red border), Teaching Assignment, Course, Service Roles, Member, Create New Course/Role, and Course Evaluation. To the right is a main content area titled '2024 Summer Term 2'. It features a grid of eight cards:

- Performace**: View department performance information.
- Teaching Assignment**: View teaching assignment for current term.
- Manage Courses**: View and edit course information.
- Manage Service Roles**: View and edit service role information.
- View Members**: View and edit various instructor profiles.
- Create New Course/Role**: Create a new course, service role, import files.
- SEI Data Entry**: Evaluate course and instructor.
- Meeting log**: Export todays meeting.

2. A summary of best performing courses in each subject area will appear.

The screenshot shows the PERFORMA application interface with the 'Performance' module selected. The main content area is titled 'Department Performance Overview' and displays four tables:

- Computer Science** (All, 100, 200, 300, 400):

#	Course	Rank	Score
1	COSC 499	N/A	0.00
2	COSC 444	D	62.00
3	COSC 441	N/A	0.00
4	COSC 421	B	82.59
5	COSC 414	F	29.65

- Mathematics** (All, 100, 200, 300, 400):

#	Course	Rank	Score
1	MATH 350	F	46.65
2	MATH 323	F	7.41
3	MATH 225	A	94.35
4	MATH 223	F	51.93
5	MATH 220	D	62.56

- Physics** (All, 100, 200, 300, 400):

#	Course	Rank	Score
1	PHYS 320	F	5.96
2	PHYS 304	F	28.19
3	PHYS 216	F	57.54
4	PHYS 215	D	65.19
5	PHYS 200	F	28.87

- Statistics** (All, 100, 200, 300, 400):

#	Course	Rank	Score
1	STAT 205	F	48.05
2	STAT 203	F	50.15

Below these tables are two more sections:

- Benchmark**: Current Month: August

#	Name	Shortage
1	Sophia Anne Wilson	181 Hours 25 Minutes
2	Jane Allison Smith	21 Hours 5 Minutes
3	Ava Martinez	20 Hours 52 Minutes
4	Sarah Lee Chen	19 Hours 25 Minutes
5	Ethan Anderson	16 Hours 34 Minutes
6	Michael Nguyen	15 Hours 31 Minutes

- Leaderboard (Top 5 and Bottom 5)**

#	Name	Score
1	Jane Allison Smith	79.8
2	Ethan Anderson	78.1
3	Michael Nguyen	64.1
4	John Doe	61.2
5	William Anderson	60

3. Initially, best performing courses in all year level will be displayed.
4. Click on the year level you would like to filter by. For example, to see only 200-level Computer Science courses.

Computer Science**All** **100** **200** **300** **400**

#	Course	Rank	Score
1	COSC 499	N/A	0.00
2	COSC 444	D	62.00
3	COSC 441	N/A	0.00
4	COSC 421	B	82.59
5	COSC 414	F	29.65

Computer Science**All** **100** **200** **300** **400**

#	Course	Rank	Score
1	COSC 222	N/A	0.00
2	COSC 221	N/A	0.00

Viewing Instructors Lacking Service Hours

1. Same as above (Viewing Top Performing Courses).
2. Same as above (Viewing Top Performing Courses).

- Worst service hour shortages up until the current month by instructors will be displayed.

Benchmark		Current Month: August
#	Name	Shortage
1	Sophia Anne Wilson	181 Hours 25 Minutes
2	Jane Allison Smith	21 Hours 5 Minutes
3	Ava Martinez	20 Hours 52 Minutes
4	Sarah Lee Chen	19 Hours 25 Minutes
5	Ethan Anderson	16 Hours 34 Minutes
6	Michael Nguyen	15 Hours 31 Minutes

Viewing Top and Lowest Performing Instructors

- Same as above (Viewing Top Performing Courses).
- Same as above (Viewing Top Performing Courses).
- Initially, best performing instructors will be displayed. To see worst performing instructors, click the “Bottom” button.

Leaderboard (Top 5 and Bottom 5)

Top
Bottom

#	Name	Score
1	Jane Allison Smith	79.8
2	Ethan Anderson	78.1
3	Michael Nguyen	64.1
4	John Doe	61.2
5	William Anderson	60

Leaderboard (Top 5 and Bottom 5)

Top
Bottom

#	Name	Score
1	Sophia Anne Wilson	27.4
2	Ava Martinez	34
3	Sarah Lee Chen	38.1
4	Ava Martinez	38.9
5	Olivia Marie Rodriguez	45.9

3.10 Importing Data

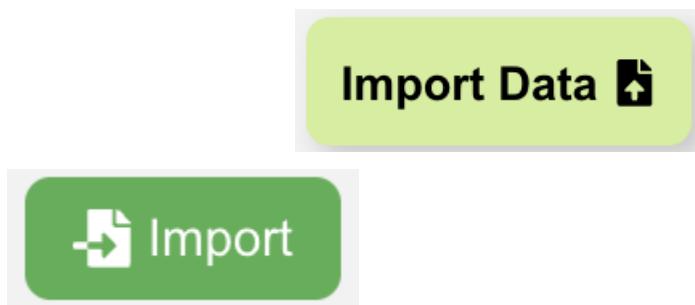
The PEFORMA Department Management System allows profile, course, service role, SEI entry, meeting creation, as well as teaching, service role, and TA assignment through import. Additionally, uploading spreadsheets containing rows already existing in the database will update the database (see 3.8 Importing Data - Accepted Spreadsheet Format and Update Anchor) and uploading the same spreadsheet a second time will produce no effect.

General Instruction

1. Navigate to one of the "Create New Course/Role", "Meeting Log" and "Course Evaluation" pages.

The screenshot shows the PEFORMA dashboard with a sidebar on the left containing links for Dashboard, Performance, Teaching Assignment, Course, Service Roles, Member, and Create New Course/Role. The main area displays several cards: Performance, Teaching Assignment, Manage Courses, Manage Service Roles, View Members, Create New Course/Role (which is highlighted with a red border), SEI Data Entry, and Meeting log. Each card has a brief description below it. The top right corner shows a user profile and logout link.

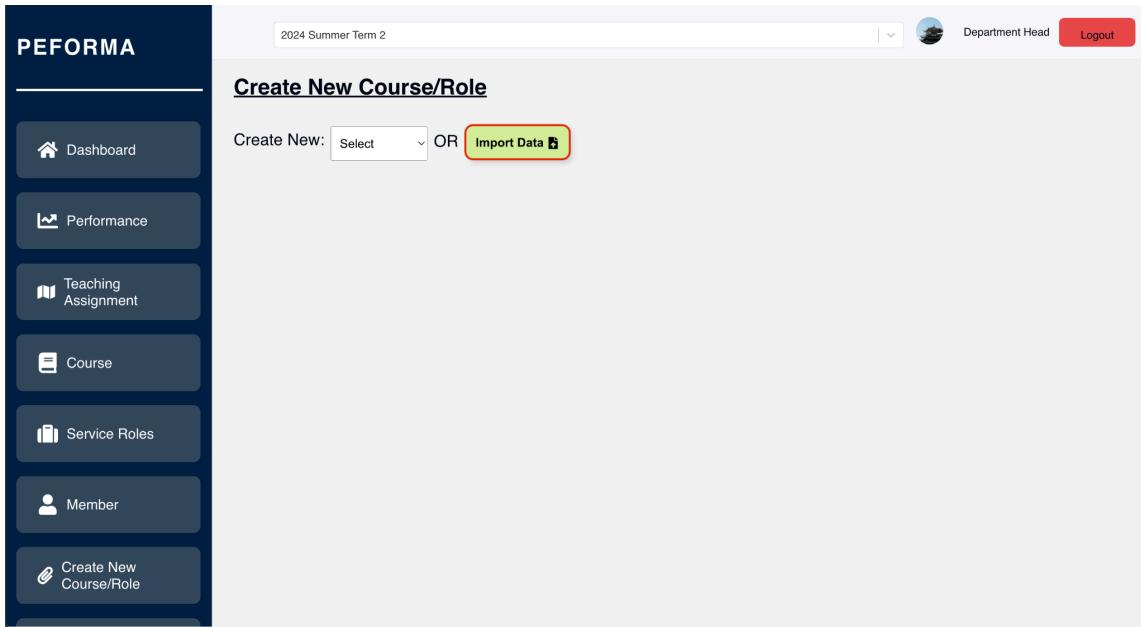
2. Look for the "Import Data"/"Import" button.



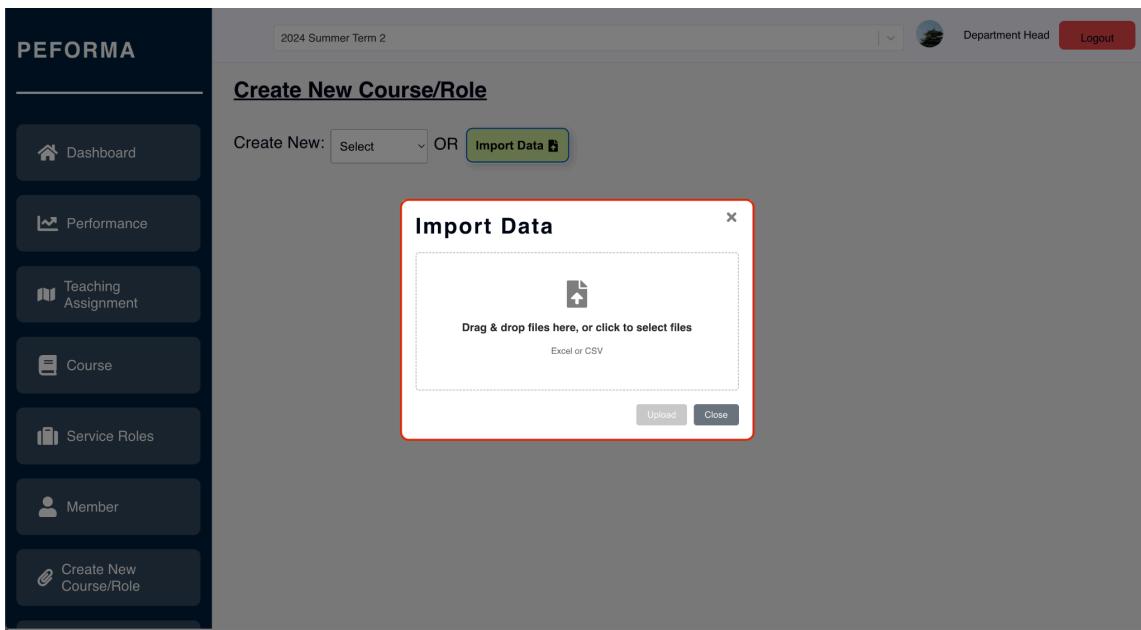
Create New Course/Role page
Meeting Log pages

Course Evaluation &

3. Click the “Import Data”/“Import” button.

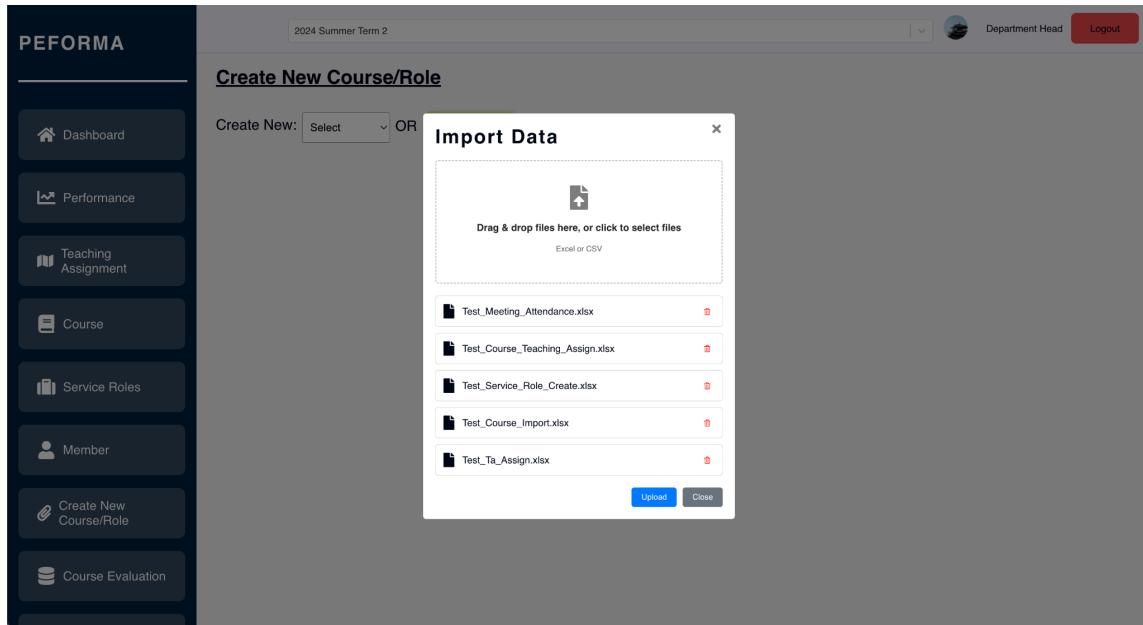


4. An “Import Data” pop-up will appear.

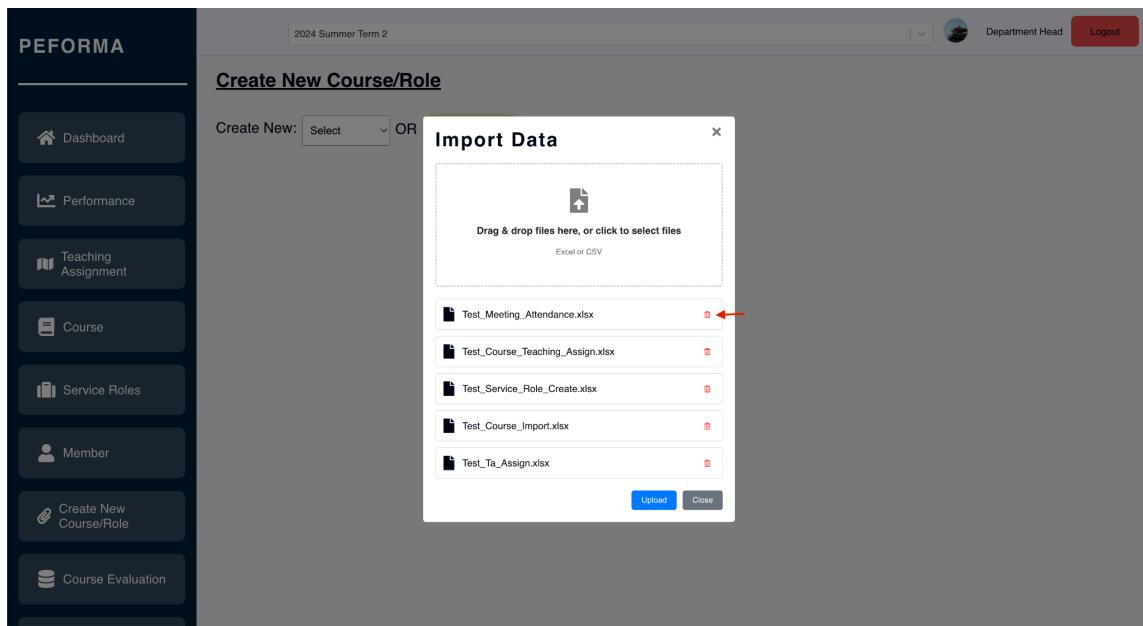


5. Select your prepared spreadsheet file by choosing from your computer or dropping it in the dropzone. For accepted spreadsheet format, please see the next section (3.8 Importing Data - Accepted Spreadsheet Format). The import feature only accept Excel and CSV

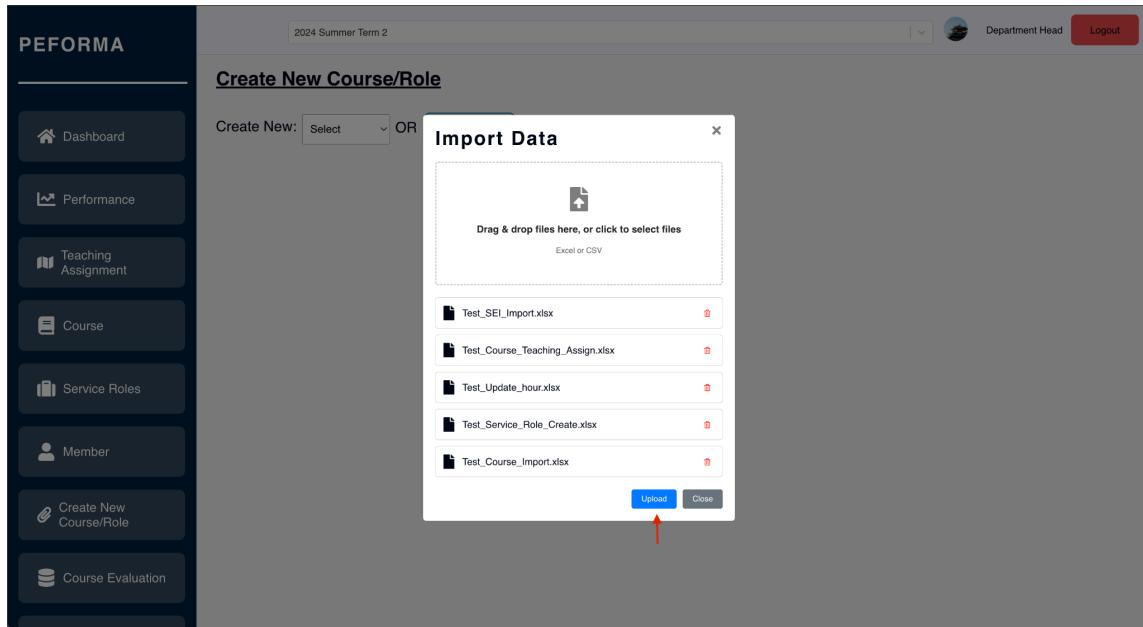
files. You may upload up to 5 files at once.



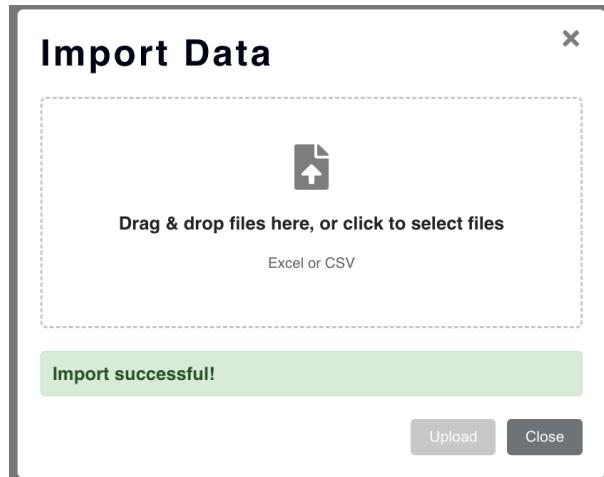
Note: To remove a file from the selection, click the red garbage bin icon.

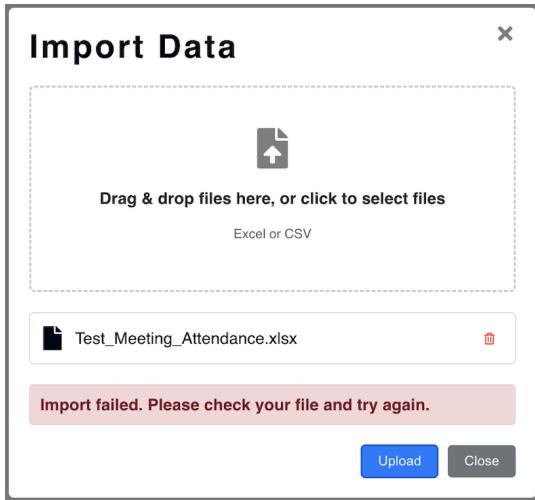


6. Click the “Upload” button to upload your data.



7. A message will appear indicating a successful/failed upload.





Accepted Spreadsheet Format and Update Anchor

Preliminary Notes

1. An update anchor is the column or combination of columns our system will use to determine if the data in an imported spreadsheet is already existing in the database. In such an event, the system will update all columns of the existing row(s) other than the column(s) in the update anchor to match the imported data. Updating through importing has limited support and importing data that already exists in the database will not have an effect at all for most import spreadsheet types.
2. The divisionId is assigned as:
 - a. COSC: 1
 - b. MATH: 2
 - c. PHYS: 3
 - d. STAT: 4
3. The Term is assigned as:
 - a. XXXX₁ = XXXX Winter Term 1
 - b. XXXX₂ = XXXX Winter Term 2
 - c. XXXX₃ = XXXX Summer Term 1
 - d. XXXX₄ = XXXX Summer Term 2

For example, 20244 = 2024 Summer Term 2

The following are formats expected for a spreadsheet with valid entries. Please name your column headers the way they are named in the examples and follow formats of entry value as closely as possible to guarantee a successful import. The update anchors are boxed in red lines. If there are no red boxes in the example format, then that spreadsheet type does not support updating through import.

Profile Creation/Edition

firstName	middleName	lastName	email	phoneNum	officeBuilding	officeNum	position	divisionId	UBCId	serviceHourCompleted	sRoleBenchmark
Marie		Curie	marie@test.ca	111-222-444	CHEM		999 Associate Professor	4	100002	25	5

Column Label	Represents...
firstName	First Name
middleName	Middle Name
lastName	Last Name
email	Email Address
phoneNum	Phone Number
officeBuilding	Office Building
officeNum	Office Number
position	Teaching Position / Academic Rank
divisionId	Subject Area
UBCId	UBC ID
serviceHourCompleted	Service Hour Completed to Date
sRoleBenchmark	Annual Service Hour Benchmark

Course Creation/Edition

ctitle	description	divisionId	courseNum
Hogwarts Potions 101	Introduction to brewing potions and avoiding cauldron explosions.	2	101

Column Label	Represents...
ctitle	Course Title
description	Course Description
divisionId	Subject Area
courseNum	Course Number

Service Role Creation/Edition

stitle	description	divisionId	year	JANHour	FEBHour	MARHour	APRHour	MAYHour	JUNHour	JULHour	AUGHour	SEPHour	OCTHour	NOVHour	DECHour
Chief Cat Herder	Responsible for organizing and motivating a team of independent-minded felines.	1	2024	15	10	8	12	10	5	0	0	5	10	15	0

Column Label	Represents...
stitle	Service Role Title
description	Service Role Description
divisionId	Subject Area
year	Year of the Service Role
JANHour	Expected Service Hour for the Service Role in January
FEBHour	Expected Service Hour for the Service Role in February
MARHour	Expected Service Hour for the Service Role in March
APRHour	Expected Service Hour for the Service Role in April
MAYHour	Expected Service Hour for the Service Role in May
JUNHour	Expected Service Hour for the

	Service Role in June
JULHour	Expected Service Hour for the Service Role in July
AUGHour	Expected Service Hour for the Service Role in August
SEPHour	Expected Service Hour for the Service Role in September
OCTHour	Expected Service Hour for the Service Role in October
NOVHour	Expected Service Hour for the Service Role in November
DECHour	Expected Service Hour for the Service Role in December

SEI Entry Creation

CourseId	Term	profileId	SEIQ1	SEIQ2	SEIQ3	SEIQ4	SEIQ5	SEIQ6	retentionRate	failRate	enrolRate	averageGrade	
18	20244	2	9	9	9	9	8	6	2	87.36	56.31	51.15	52.14

Column Label	Represents...
CourseId	Course ID
Term	Term
profileId	Profile ID
SEIQ1	SEI Question 1 Rating
SEIQ2	SEI Question 2 Rating
SEIQ3	SEI Question 3 Rating
SEIQ4	SEI Question 4 Rating
SEIQ5	SEI Question 5 Rating
SEIQ6	SEI Question 6 Rating

retentionRate	Student Retention Rate
failRate	Student Failing Rate
enrolRate	Student Enrolment Rate
averageGrade	Student Average Grade

Meeting Creation

title	location	date	time	expected
Meeting 1	ASC 201	2024-10-12	12:00:00	11111111,11111112

Column Label	Represents...
title	Meeting Title
location	Meeting Location
date	Meeting Date
time	Meeting Time
expected	Expected Attendees' UBC IDs

Teaching Assignment

term	division	courseNum	UBCID
20251	MATH	101	11111112

Column Label	Represents...
Term	Term of the Course Offering
division	Subject Area
courseNum	Course Number

UBCID	UBC ID
-------	--------

Service Role Assignment

UBCID	ServiceTitle	year
11111111	Undergraduate Advisor	2025

Column Label	Represents...
UBCID	UBC ID
ServiceTitle	Service Role Title
Year	Year of the Service Role

TA Assignment

TA_Term	UBCId	firstName	middleName	lastName	email	courseId
20251	33333333	John		Doe	john.doe@example.com	1

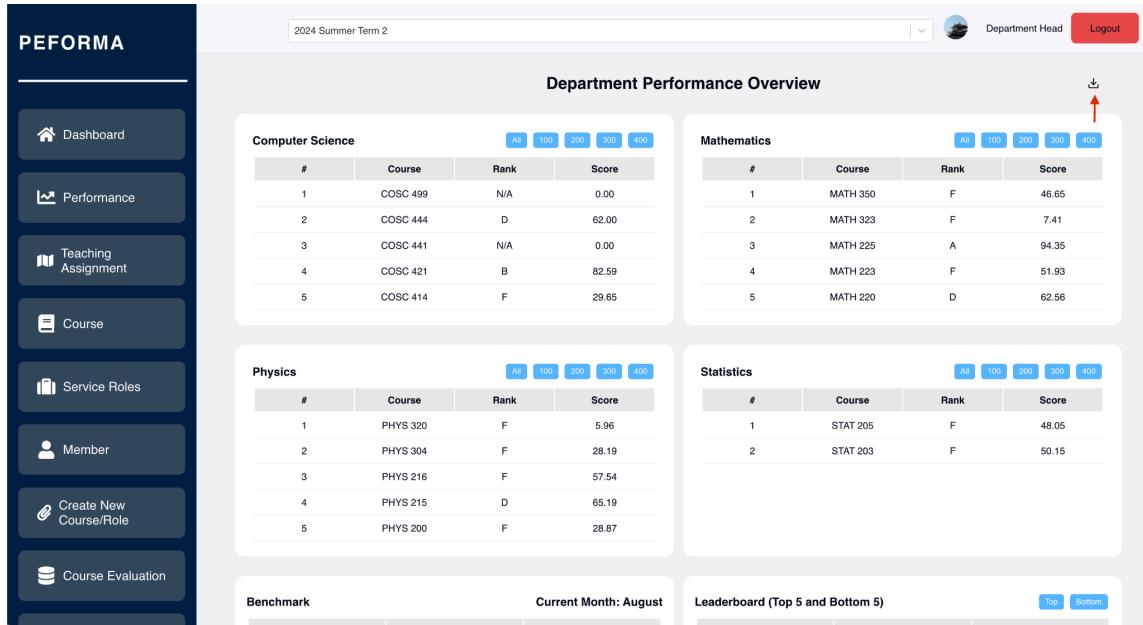
Column Label	Represents...
TA_Term	Term of the Course Offering
UBCId	UBC ID
firstName	First Name
middleName	Middle Name
lastName	Last Name
email	Email Address
courseId	Course ID

3.11 Exporting Data

The PEFORMA Department Management System allows you to export various types of data (performance overview, list of courses, service roles, members, and teaching assignments) for further analysis or record-keeping. Most data is exported to CSV (Comma-Separated Values) format, while some graphical data can be exported to PDF. This guide will walk you through the process of exporting data in both formats.

Exporting to CSV

1. Navigate to the page containing the data you want to export.
2. Look for a "Download" icon button, often represented by a download icon or located in the top right of the data table.



The screenshot shows the 'Department Performance Overview' page. On the left is a sidebar with navigation links: Dashboard, Performance, Teaching Assignment, Course, Service Roles, Member, Create New Course/Role, and Course Evaluation. The main area contains four data tables:

- Computer Science**:

#	Course	Rank	Score
1	COSC 499	N/A	0.00
2	COSC 444	D	62.00
3	COSC 441	N/A	0.00
4	COSC 421	B	82.59
5	COSC 414	F	29.65
- Mathematics**:

#	Course	Rank	Score
1	MATH 350	F	46.65
2	MATH 323	F	7.41
3	MATH 225	A	94.35
4	MATH 223	F	51.93
5	MATH 220	D	62.56
- Physics**:

#	Course	Rank	Score
1	PHYS 320	F	5.96
2	PHYS 304	F	28.19
3	PHYS 216	F	57.54
4	PHYS 215	D	65.19
5	PHYS 200	F	28.87
- Statistics**:

#	Course	Rank	Score
1	STAT 205	F	48.05
2	STAT 203	F	50.15

At the bottom, there are buttons for 'Benchmark', 'Current Month: August', 'Leaderboard (Top 5 and Bottom 5)', and 'Top' and 'Bottom' filters.

3. Click the export button.
4. Depending on your browser settings, the file will either:
 - Download automatically to your default download folder
 - Prompt you to choose a location to save the file
5. Once downloaded, you can open the CSV file with your preferred spreadsheet application.

4. For Instructors

4.1 Viewing Personal Teaching Performance

Your personal teaching performance score is displayed in your personal profile.

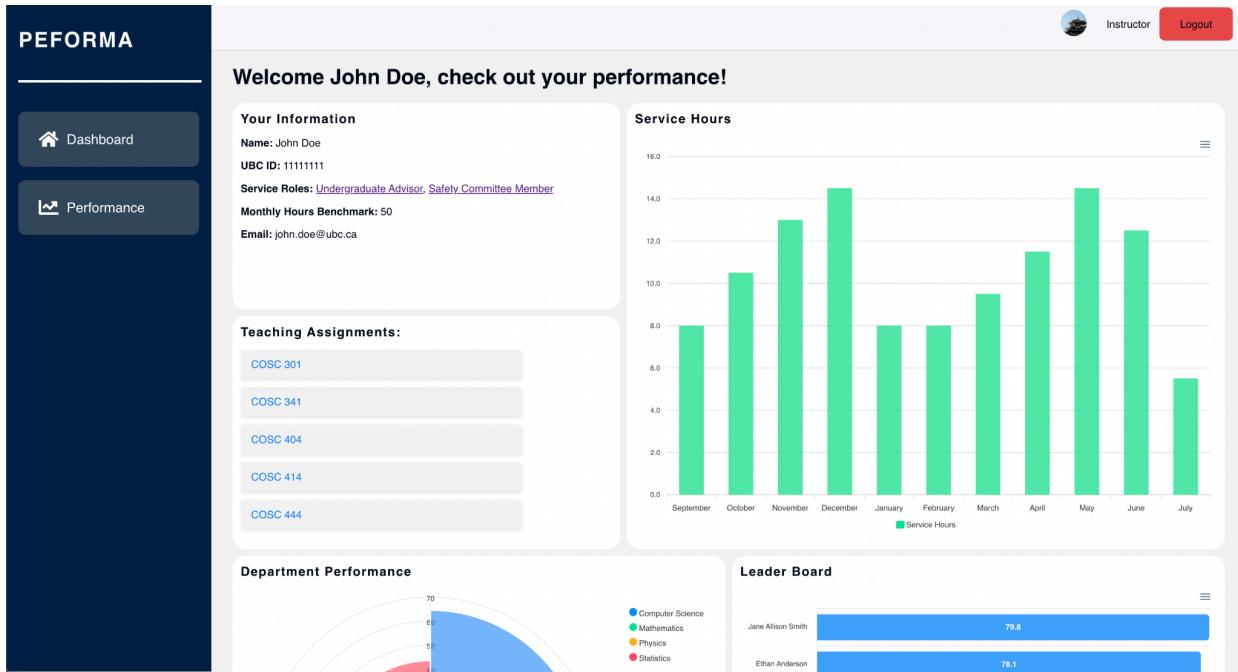
The screenshot shows the PEFORMA application interface. On the left is a dark sidebar with the word "PEFORMA" at the top and two buttons: "Dashboard" and "Performance". The main area is titled "My Profile" and shows a profile picture of a person and the name "David Kim" with the email "david.kim@ubc.ca" and UBC ID "11111115". To the right of the profile picture, a yellow box displays the "Performance Score" as "70.3" with an upward-pointing red arrow. Below the profile picture, there are two sections: "Personal Information" and "Teaching". "Personal Information" includes fields for "Office Location" (SCI 123), "Phone Number" (250-555-6789), and "Division" (Mathematics). "Teaching" includes fields for "Current Course(s)" (MATH 225 (Introduction to Differential Equations)) and "Service" (Undergraduate Advisor). At the bottom, it shows "Hours Completed" (20 / 80 Hours). The top right of the main area has "Instructor" and "Logout" buttons.

For navigation instruction to your personal profile, please see 6.2 Viewing Personal Information.

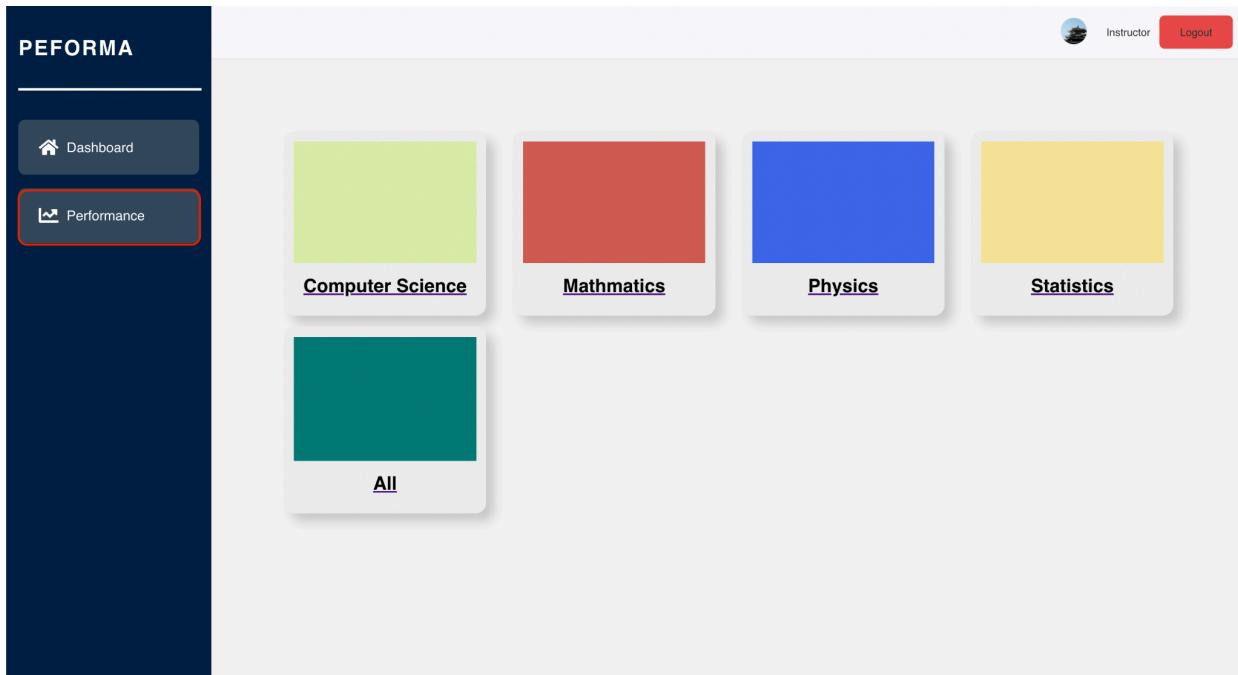
Note: Your personal performance score isn't shared with anyone except the department head.

4.2 Viewing and Understanding Performance Summary and Progress Tracking Page

Once you have logged in as an instructor, the landing page should be your personal performance summary page.



If not, click on the “Performance” button in the navigation bar. This will redirect you to the personal performance summary page.



Your Information Section

Your Information

Name: John Doe

UBC ID: 11111111

Service Roles: Undergraduate Advisor, Safety Committee Member

Monthly Hours Benchmark: 50

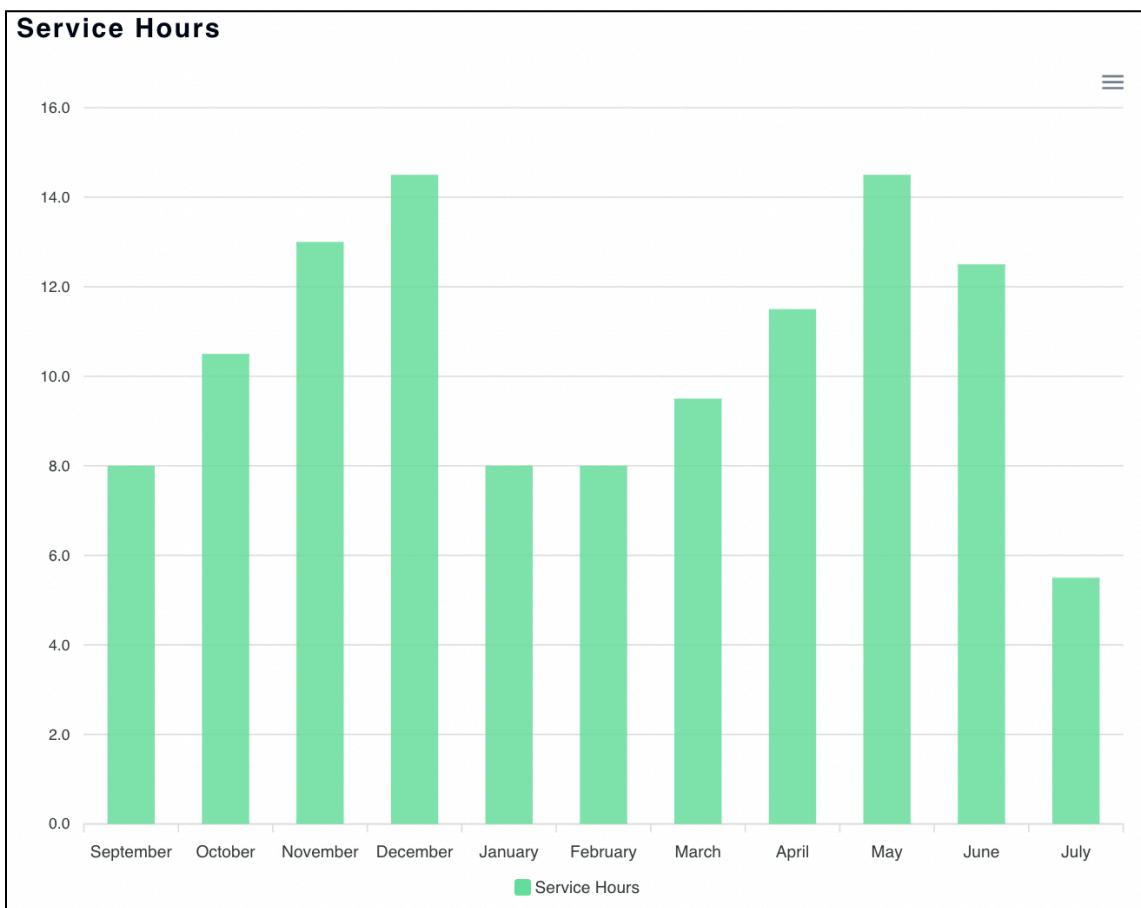
Email: john.doe@ubc.ca

This section displays your basic information:

- Name
- UBC ID
- Current service roles
- Annual service hour benchmark
- Email address

Review this information regularly to ensure it's up to date. If you notice any discrepancies, please contact the department administration.

Service Hours Section



This section features a bar graph representation of your service hours:

- Each bar represents a month.
- The height of each bar indicates the number of service hours completed.

To interact with the graph:

- Hover over bars to see exact numbers.

Teaching Assignments Section

Teaching Assignments:

COSC 301

COSC 341

COSC 404

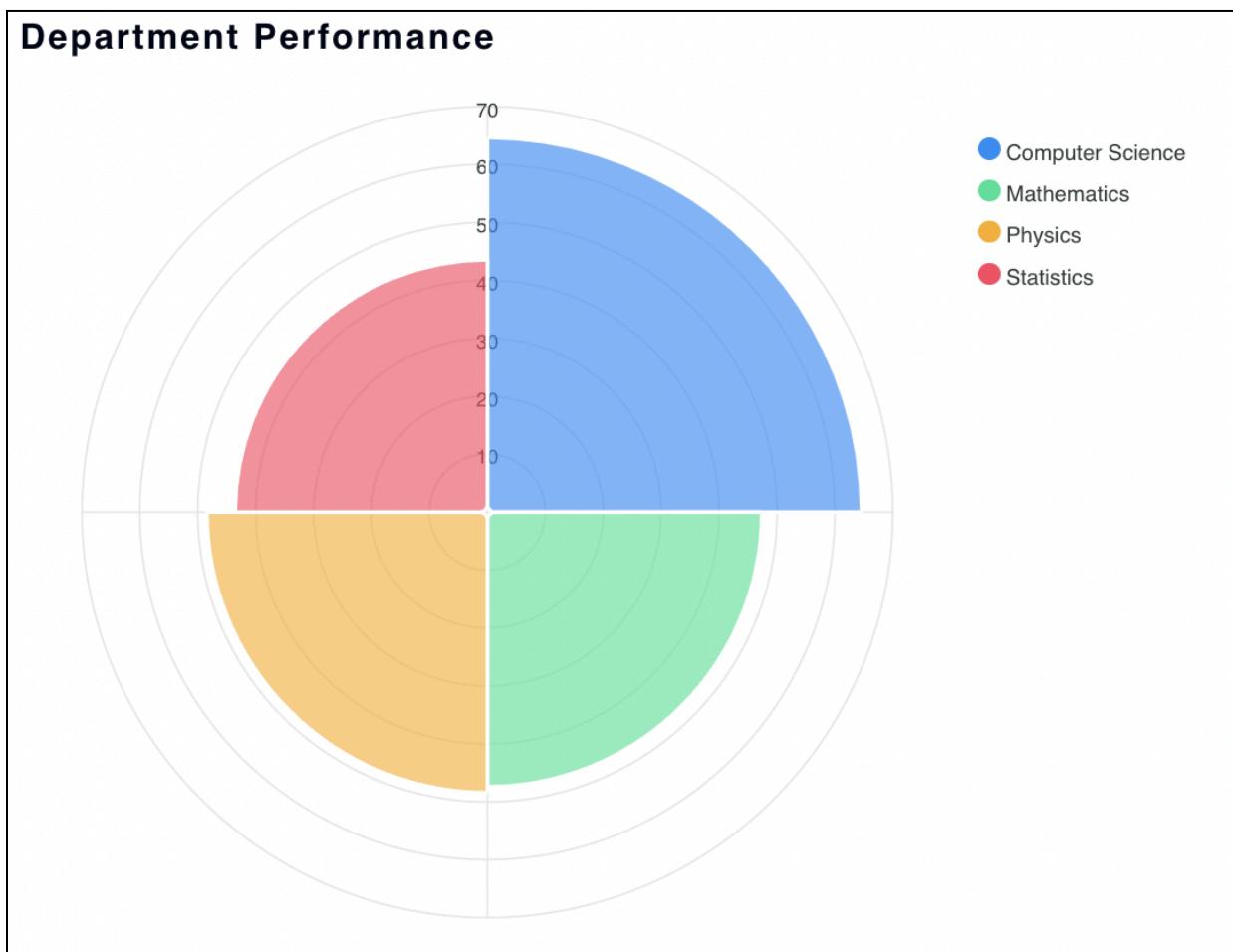
COSC 414

COSC 444

This section lists your current teaching assignments.

Review this section to ensure all your teaching assignments are correctly listed. If you notice any discrepancies, contact your department coordinator.

Department Performance Section

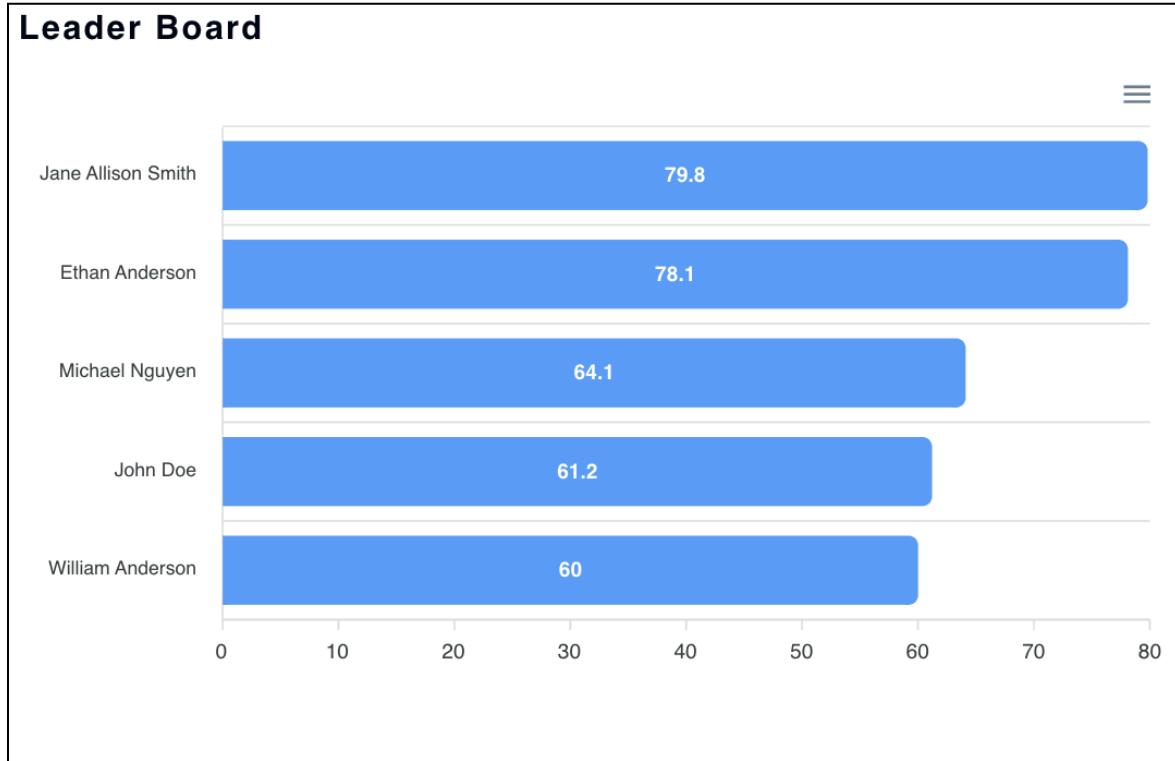


This section provides an overview of the entire subject area's performance:

- It includes averages for teaching evaluations and other metrics such as student retention rate.

Use this information to understand your contributions in the context of the broader department.

Leaderboard Section

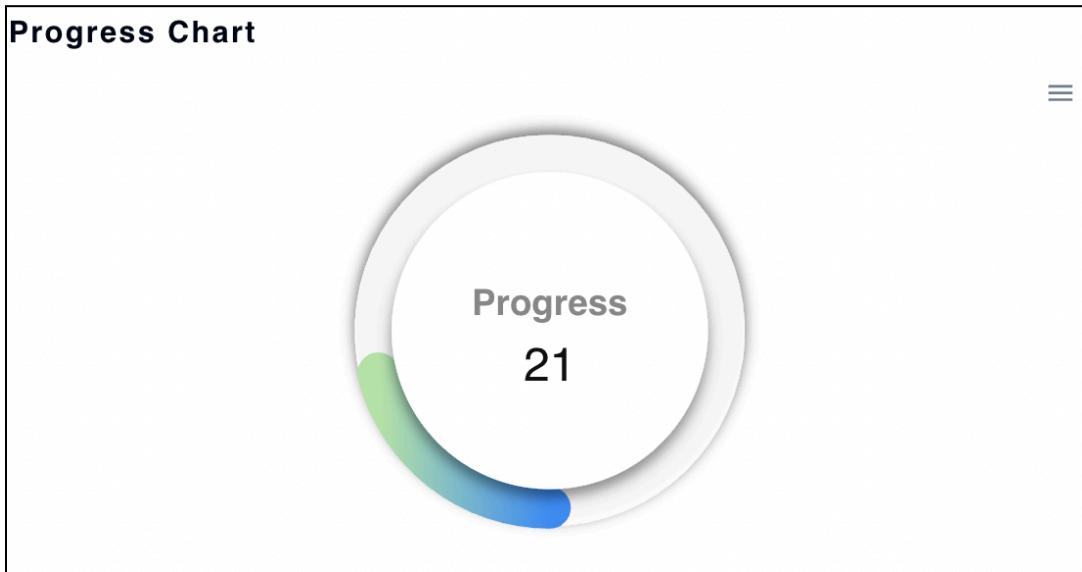


The leaderboard showcases top performers in teaching performance:

- Scores for each top performers are displayed

Remember, this is meant to be motivational. If you're not on the leaderboard, consider it as inspiration for areas where you might focus your efforts.

Progress Chart Section



This chart shows your progress towards your service hour goals:

- It indicates the completion of your annual service hour benchmark completion up until the last month in percentages.

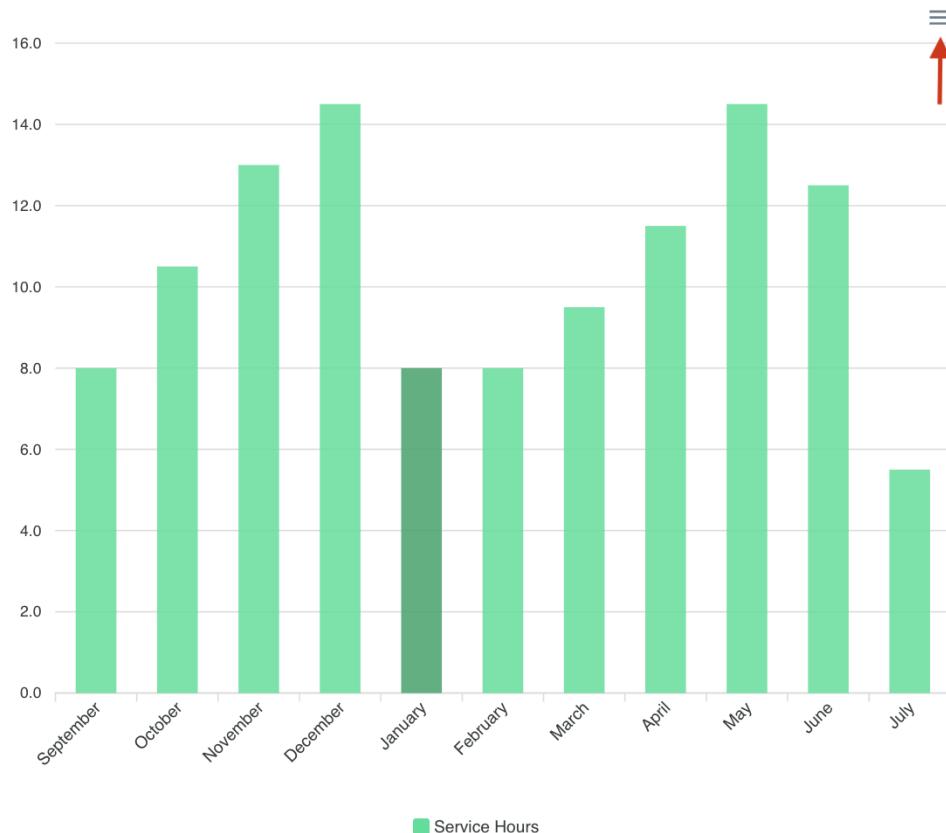
4.3 Exporting Performance Data

For pages displaying graphs or charts, you have the option to export to SVG, PNG or CSV.

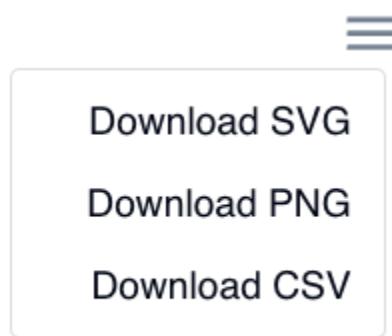
1. Locate the graph you want to export.

2. Look for an "Export" button near the graph, represented by a three-bar icon.

Service Hours



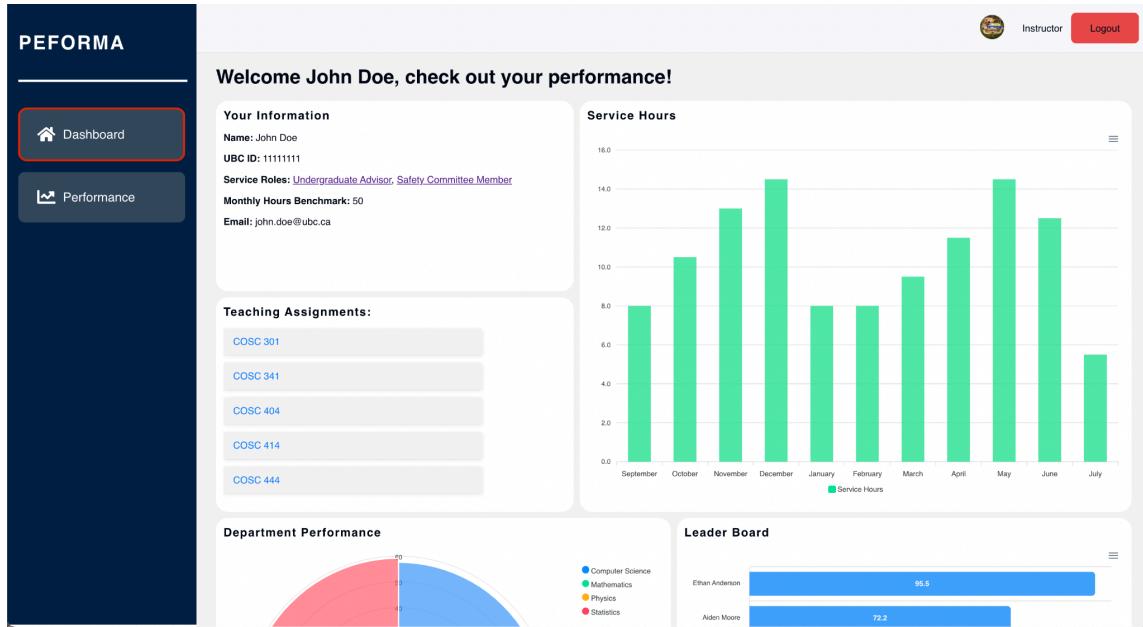
3. Click the export button and select the desired export type.



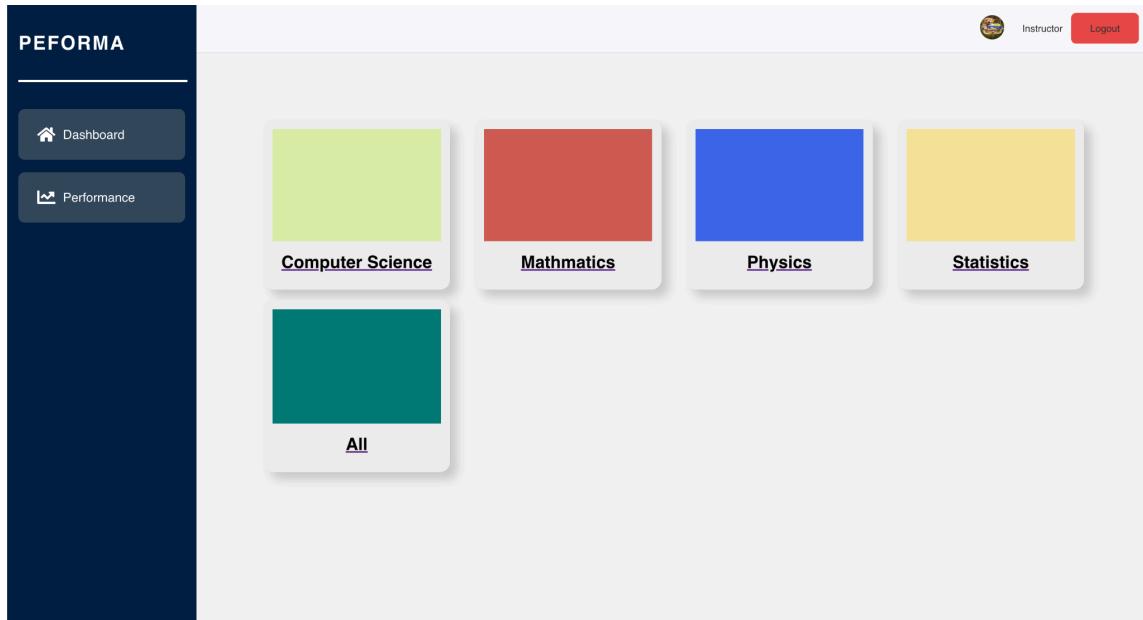
4. Depending on your browser settings, the file will either:
 - Download automatically to your default download folder
 - Prompt you to choose a location to save the file
5. Once downloaded, you can open the file with your preferred spreadsheet application.

4.4 Viewing Teaching Assignments

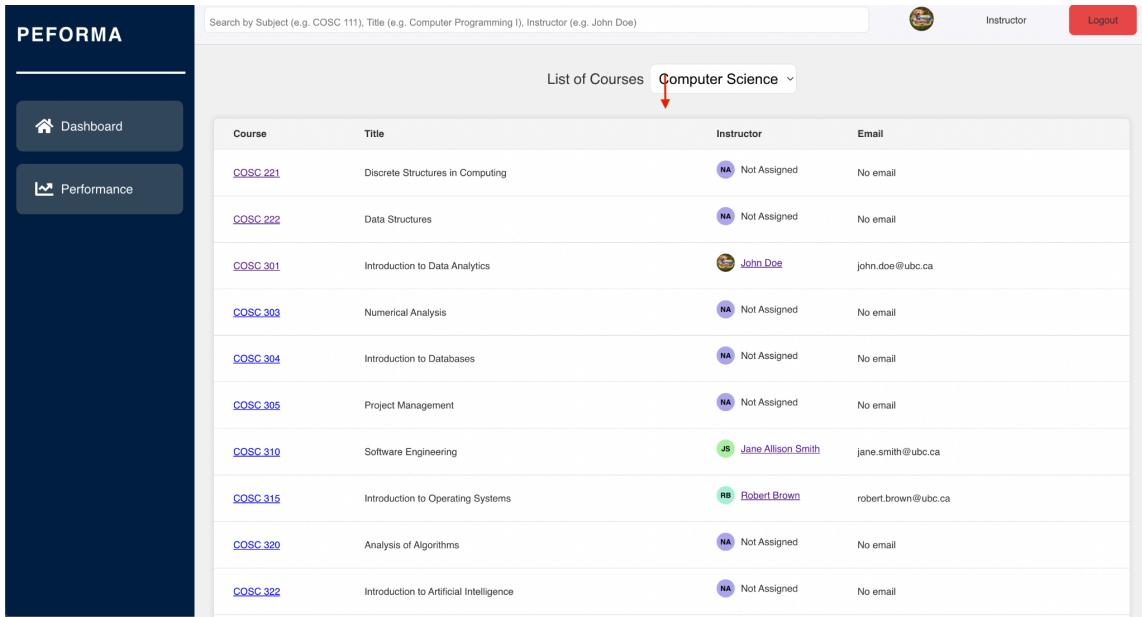
1. Navigate to the dashboard by clicking on the “Dashboard” button in the navigation bar.



2. A gallery of cards representing each subject area will appear. Click on the desired subject area for teaching assignments.



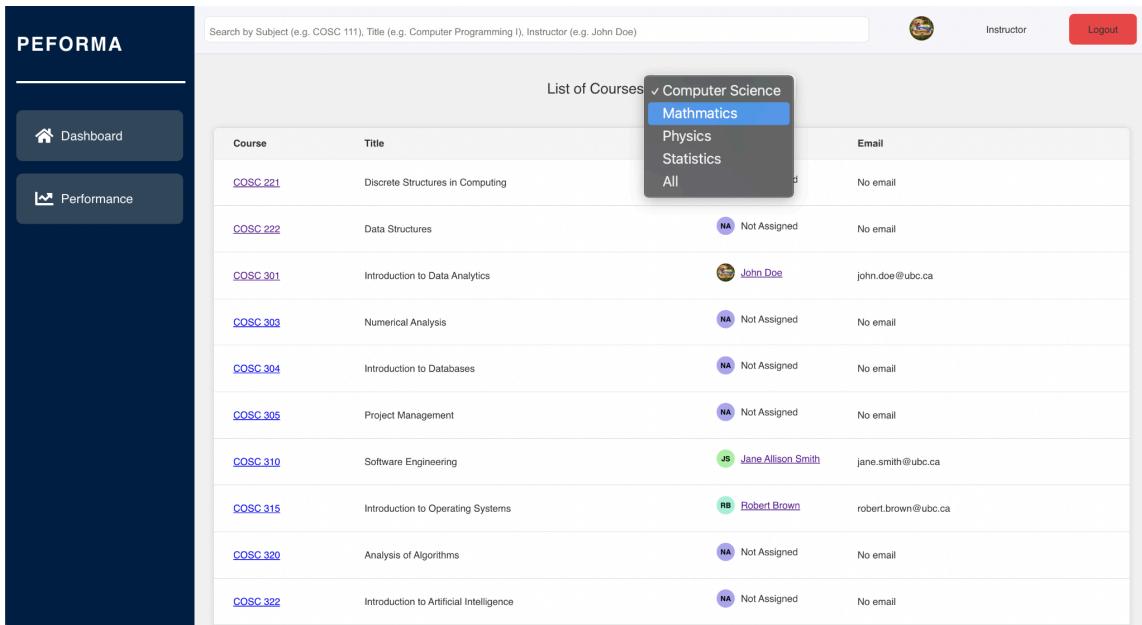
3. A list of teaching assignments in the subject area you selected will appear.



The screenshot shows the PEFORMA dashboard with a sidebar on the left containing 'Dashboard' and 'Performance' buttons. The main content area has a search bar at the top with placeholder text 'Search by Subject (e.g. COSC 111), Title (e.g. Computer Programming I), Instructor (e.g. John Doe)'. Below the search bar is a dropdown menu labeled 'List of Courses' with a red arrow pointing to it. The dropdown menu is open, showing 'Computer Science' with a checkmark and several other options: 'Mathematics', 'Physics', 'Statistics', and 'All'. The main table below the dropdown lists ten courses:

Course	Title	Instructor	Email
COSC 221	Discrete Structures in Computing	Not Assigned	No email
COSC 222	Data Structures	Not Assigned	No email
COSC 301	Introduction to Data Analytics	John Doe	john.doe@ubc.ca
COSC 303	Numerical Analysis	Not Assigned	No email
COSC 304	Introduction to Databases	Not Assigned	No email
COSC 305	Project Management	Not Assigned	No email
COSC 310	Software Engineering	Jane Allison Smith	jane.smith@ubc.ca
COSC 315	Introduction to Operating Systems	Robert Brown	robert.brown@ubc.ca
COSC 320	Analysis of Algorithms	Not Assigned	No email
COSC 322	Introduction to Artificial Intelligence	Not Assigned	No email

You may toggle between subject areas with the dropdown menu above the list.



This screenshot is similar to the one above, but the 'Mathematics' option in the dropdown menu is highlighted with a blue background and a white border. The rest of the interface and the course list are identical to the previous screenshot.

4.5 Viewing Course Details

1. Follow the steps in 4.3 Viewing Teaching Assignments.
2. From the teaching assignment list, click on a course to view its details.

- Review additional information such as course description, lecture location, number of students enrolled, lecture time, current TA(s) and past instructors.

The screenshot shows the PERFORMA system interface. At the top right, there is a user icon, the word "Instructor", and a "Logout" button. On the left, a sidebar has "PERFORMA" at the top, followed by "Dashboard" and "Performance". The main content area displays course information for "COSC 310: Software Engineering". It includes a brief description: "Techniques to construct large systems using fundamental activities of specification, design, implementation, testing, and maintenance. Various life cycle models, exposure to software development tools, modelling techniques, good development practices, and project management." Below this are current instructor details: "Current Instructor(s) (2024 Summer Term 2): Jane Allison Smith", "Room: ENG 124", "Number of Students: 150", "Schedule: TUE THU 1:00 PM - 2:30 PM", and "Current TA(s) (2024 Summer Term 2): N/A". A "Course History" section follows, with a table header "Course History" and columns "Instructor", "Session", and "Term". A note below the table says "There are no past instructors for this course." with a page number "1" highlighted in blue.

4.6 Viewing Instructor Profiles

- Follow the steps in 4.3 Viewing Teaching Assignments.
- From the teaching assignment list, click on an instructor's name to view their detailed profile.
- Review information such as contact details, office location, and assigned courses/service roles.

The screenshot shows the PERFORMA system interface. At the top right, there is a user icon, the word "Instructor", and a "Logout" button. On the left, a sidebar has "PERFORMA" at the top, followed by "Dashboard" and "Performance". The main content area displays an "Instructor Profile" for "Jane Smith". It features a placeholder "No Image" and her contact information: "jane.smith@ubc.ca" and "UBC ID: 11111112". Below this, two tabs are visible: "Personal Information" and "Teaching". Under "Personal Information", there are entries for "Office Location" (ASC 215), "Phone Number" (250-555-3456), and "Division" (Computer Science). Under "Teaching", there is a list of "Current Course(s)": COSC 310 (Software Engineering), COSC 344 (Image Processing and Applications), COSC 406 (Numerical Optimization), COSC 421 (Network Science), and MATH 350 (Complex Variables and Applications). A "Service" tab is also present at the bottom.

5. For Admins

5.1 User Account Management

Viewing List of Users

1. Navigate to the "Account Management" page by clicking on the “Account Management” button in the navigation bar.

The screenshot shows the PEFORMA software interface. On the left, there is a dark sidebar with the word 'PEFORMA' at the top. Below it are two buttons: 'Account Management' (highlighted with a red border) and 'Create Account'. The main area is titled 'Create Account' and contains the following fields:

- Email
- First Name
- Last Name
- UBC ID (optional)
- Select Department (dropdown menu)
- Department Head
- Department Staff
- Instructor
- Admin
- Password
- Confirm Password

At the bottom are two buttons: a green 'Create' button and a red 'Cancel' button. In the top right corner of the main window, there is a user icon labeled 'AC', the word 'Admin', and a 'Logout' button.

- Browse the list of all users in the system.

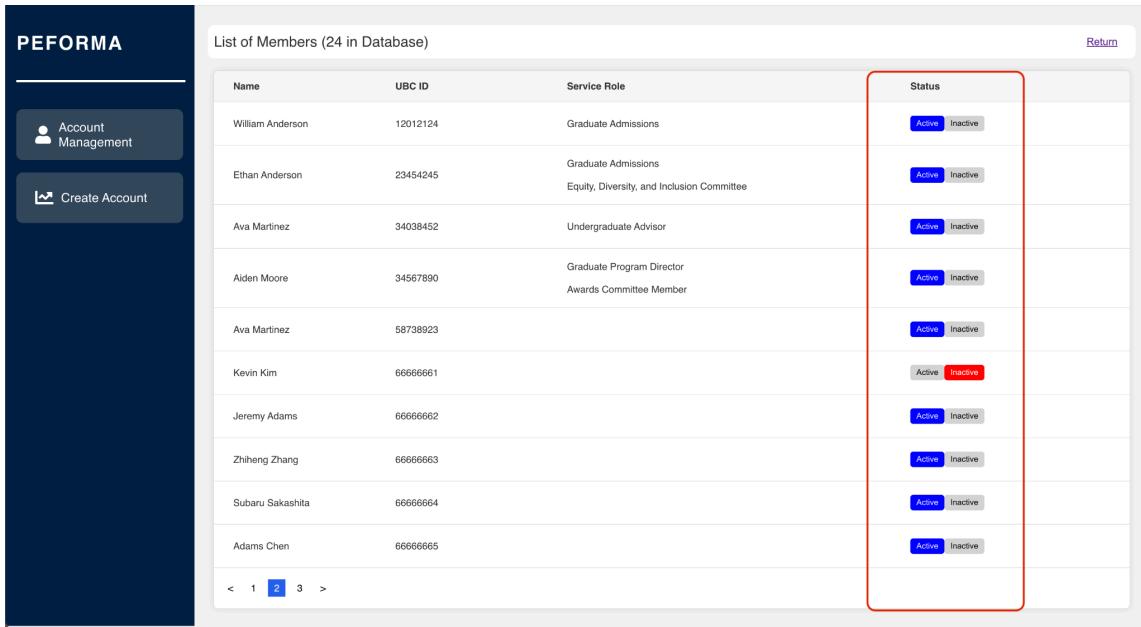
Name	UBC ID	Service Role	Status
Sophia Anne Wilson	11111110	Undergraduate Advisor	Active
John Doe	11111111	Undergraduate Advisor Safety Committee Member	Active
Jane Allison Smith	11111112	Seminar Series Organizer Graduate Admissions	Active
Robert Brown	11111113	Curriculum Committee	Inactive
Emily Davis	11111114		Inactive
David Kim	11111115	Undergraduate Advisor	Active
Sarah Lee Chen	11111116	Graduate Admissions Awards Committee Member	Active
Michael Nguyen	11111117	Curriculum Committee	Active
Olivia Marie Rodriguez	11111118	Undergraduate Research Coordinator Graduate Program Director	Active
Daniel Taylor	11111119	Curriculum Committee	Active

Activating/Deactivating an Account

- Navigate to the “Account Management” page, see 5.1 User Account Management - Viewing List of Users.
- Click the “Management Member” button.

Name	UBC ID	Service Role	Status
Sophia Anne Wilson	11111110	Undergraduate Advisor	Active
John Doe	11111111	Undergraduate Advisor Safety Committee Member	Active
Jane Allison Smith	11111112	Seminar Series Organizer Graduate Admissions	Active
Robert Brown	11111113	Curriculum Committee	Inactive
Emily Davis	11111114		Inactive
David Kim	11111115	Undergraduate Advisor	Active
Sarah Lee Chen	11111116	Graduate Admissions Awards Committee Member	Active
Michael Nguyen	11111117	Curriculum Committee	Active
Olivia Marie Rodriguez	11111118	Undergraduate Research Coordinator Graduate Program Director	Active
Daniel Taylor	11111119	Curriculum Committee	Active

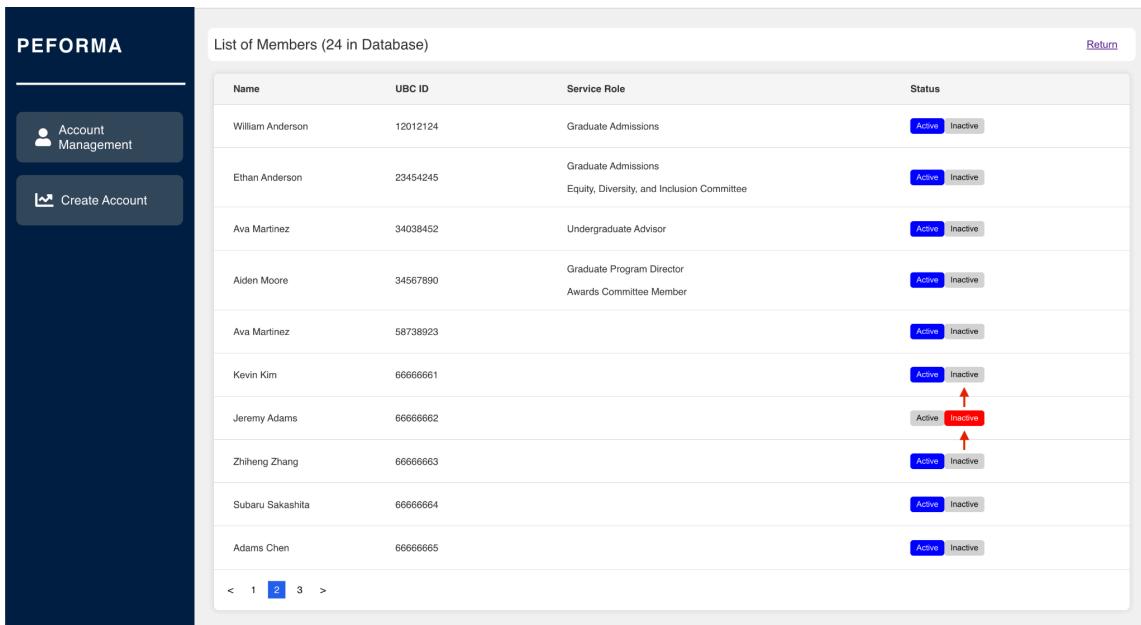
3. The “Status” column will become clickable with “Active” and “Inactive” buttons.



The screenshot shows the PEFORMA application interface. On the left is a sidebar with "Account Management" and "Create Account" buttons. The main area is titled "List of Members (24 in Database)". A red box highlights the "Status" column, which contains two buttons: "Active" (blue) and "Inactive" (grey). The table rows show member details like Name, UBC ID, Service Role, and Status.

Name	UBC ID	Service Role	Status
William Anderson	12012124	Graduate Admissions	Active Inactive
Ethan Anderson	23454245	Graduate Admissions Equity, Diversity, and Inclusion Committee	Active Inactive
Ava Martinez	34038452	Undergraduate Advisor	Active Inactive
Aiden Moore	34567890	Graduate Program Director Awards Committee Member	Active Inactive
Ava Martinez	58738923		Active Inactive
Kevin Kim	66666661		Active Inactive
Jeremy Adams	66666662		Active Inactive
Zhiheng Zhang	66666663		Active Inactive
Subaru Sakashita	66666664		Active Inactive
Adams Chen	66666665		Active Inactive

4. Click the “Active” button to activate an account and “Inactive” button to deactivate an account. For example, to activate Kevin Kim’s account and deactivate Jeremy Adams’s, do:



The screenshot shows the same application interface after changes have been made. Red arrows point to the "Inactive" button for Kevin Kim and the "Active" button for Jeremy Adams. The "Status" column now shows the updated states for these two members.

Name	UBC ID	Service Role	Status
William Anderson	12012124	Graduate Admissions	Active Inactive
Ethan Anderson	23454245	Graduate Admissions Equity, Diversity, and Inclusion Committee	Active Inactive
Ava Martinez	34038452	Undergraduate Advisor	Active Inactive
Aiden Moore	34567890	Graduate Program Director Awards Committee Member	Active Inactive
Ava Martinez	58738923		Active Inactive
Kevin Kim	66666661		Active Inactive
Jeremy Adams	66666662		Active Inactive
Zhiheng Zhang	66666663		Active Inactive
Subaru Sakashita	66666664		Active Inactive
Adams Chen	66666665		Active Inactive

5. Click the “Return” button to save your result.

The screenshot shows a user interface for managing members. On the left is a sidebar with 'Account Management' and 'Create Account' buttons. The main area is titled 'List of Members (24 in Database)' and contains a table with columns: Name, UBC ID, Service Role, and Status. The status column includes two buttons: 'Active' (blue) and 'Inactive' (grey). A red box highlights the 'Return' button in the top right corner of the list area.

Name	UBC ID	Service Role	Status
William Anderson	12012124	Graduate Admissions	Active Inactive
Ethan Anderson	23454245	Graduate Admissions Equity, Diversity, and Inclusion Committee	Active Inactive
Ava Martinez	34038452	Undergraduate Advisor	Active Inactive
Aiden Moore	34567890	Graduate Program Director Awards Committee Member	Active Inactive
Ava Martinez	58738923		Active Inactive
Kevin Kim	66666661		Active Inactive
Jeremy Adams	66666662		Active Inactive
Zhiheng Zhang	66666663		Active Inactive
Subaru Sakashita	66666664		Active Inactive
Adams Chen	66666665		Active Inactive

< 1 2 3 >

6. Kevin Kim's account is now active and Jeremy Adams's account is now inactive.

The screenshot shows the same application interface after changes. The 'Status' column for Kevin Kim and Jeremy Adams has been updated. Red arrows point to the 'Active' button for Kevin Kim and the 'Inactive' button for Jeremy Adams. The rest of the data remains the same as in the previous screenshot.

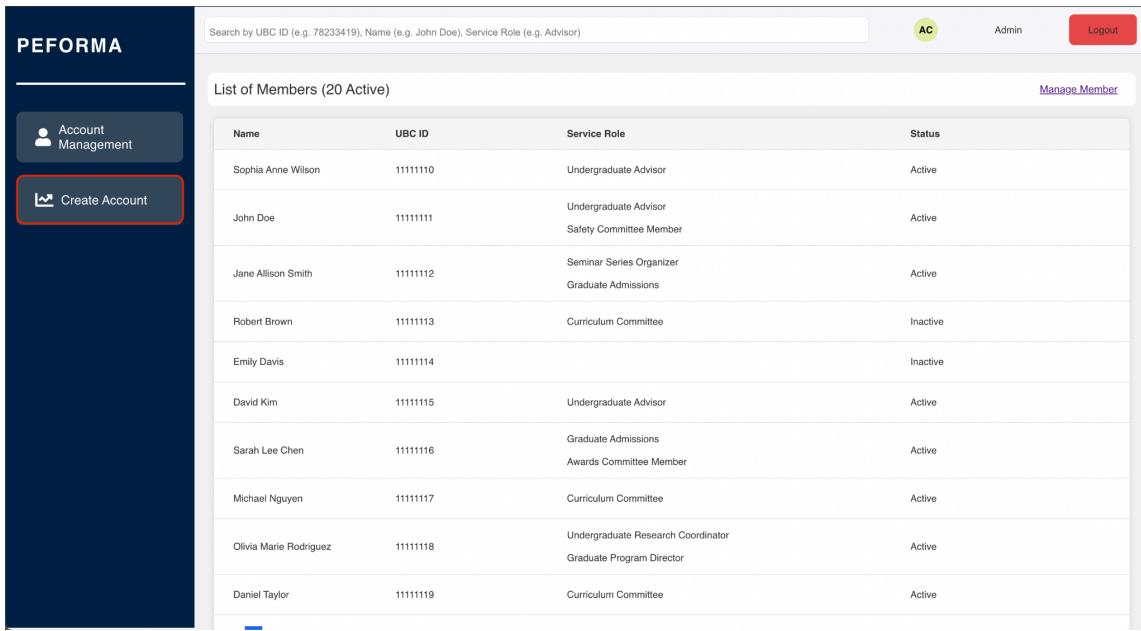
Name	UBC ID	Service Role	Status
William Anderson	12012124	Graduate Admissions	Active
Ethan Anderson	23454245	Graduate Admissions Equity, Diversity, and Inclusion Committee	Active
Ava Martinez	34038452	Undergraduate Advisor	Active
Aiden Moore	34567890	Graduate Program Director Awards Committee Member	Active
Ava Martinez	58738923		Active
Kevin Kim	66666661		Active ←
Jeremy Adams	66666662		Inactive ←
Zhiheng Zhang	66666663		Active
Subaru Sakashita	66666664		Active
Adams Chen	66666665		Active

< 1 2 3 >

Note: Only Admin and Department Staff accounts can be activated/deactivated for data integrity purposes.

Creating a New Account

1. Navigate to the "Create Account" page by clicking on the “Create Account” button in the navigation bar.



PEFORMA

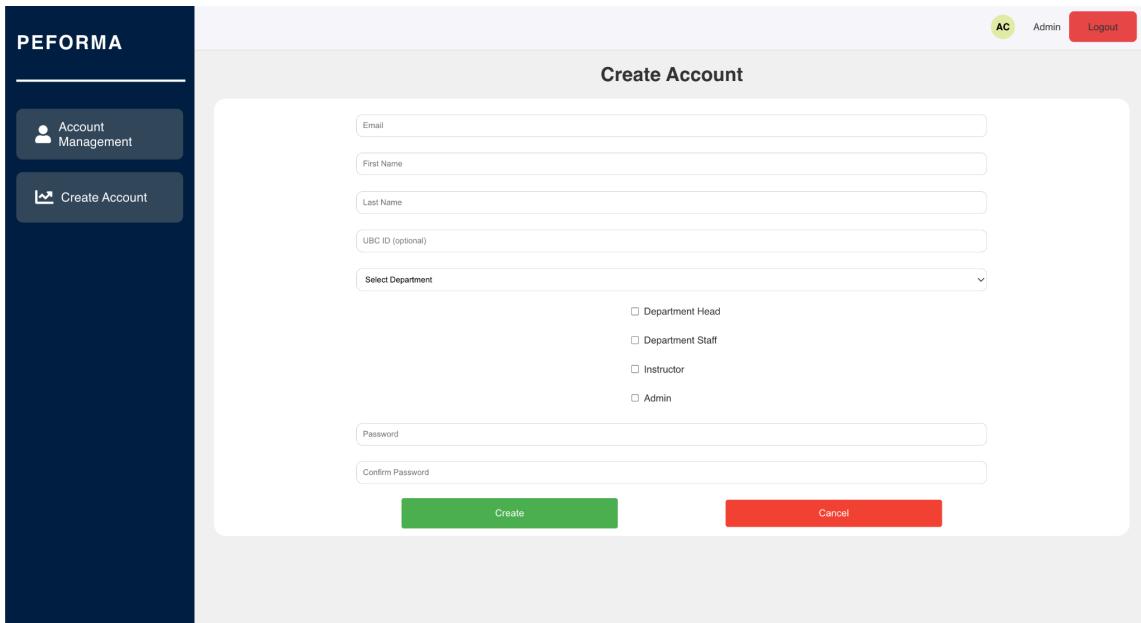
Search by UBC ID (e.g. 78233419), Name (e.g. John Doe), Service Role (e.g. Advisor)

AC Admin Logout

List of Members (20 Active) [Manage Member](#)

Name	UBC ID	Service Role	Status
Sophia Anne Wilson	11111110	Undergraduate Advisor	Active
John Doe	11111111	Undergraduate Advisor Safety Committee Member	Active
Jane Allison Smith	11111112	Seminar Series Organizer Graduate Admissions	Active
Robert Brown	11111113	Curriculum Committee	Inactive
Emily Davis	11111114		Inactive
David Kim	11111115	Undergraduate Advisor	Active
Sarah Lee Chen	11111116	Graduate Admissions Awards Committee Member	Active
Michael Nguyen	11111117	Curriculum Committee	Active
Olivia Marie Rodriguez	11111118	Undergraduate Research Coordinator Graduate Program Director	Active
Daniel Taylor	11111119	Curriculum Committee	Active

2. A fillable form will appear. Enter the new account's information.



PEFORMA

AC Admin Logout

Create Account

Email

First Name

Last Name

UBC ID (optional)

Select Department

Department Head
 Department Staff
 Instructor
 Admin

Password

Confirm Password

Create **Cancel**

3. Click the “Create” button.

The screenshot shows the 'Create Account' dialog box. It includes fields for Email, First Name, Last Name, UBC ID, and Department. Under 'Service Role', 'Instructor' is selected. Below the form are two password fields and a 'Create' button.

4. A new account with the information you entered has been successfully created.

The screenshot shows the 'List of Members' page with a table of active accounts. The table columns are Name, UBC ID, Service Role, and Status. The 'Example Account' row is highlighted with a red border.

Name	UBC ID	Service Role	Status
Example Account	10101010		Inactive
Sophia Anne Wilson	11111110	Undergraduate Advisor	Active
John Doe	11111111	Undergraduate Advisor Safety Committee Member	Active
Jane Allison Smith	11111112	Seminar Series Organizer Graduate Admissions	Active
Robert Brown	11111113	Curriculum Committee	Inactive
Emily Davis	11111114		Inactive
David Kim	11111115	Undergraduate Advisor	Active
Sarah Lee Chen	11111116	Graduate Admissions Awards Committee Member	Active
Michael Nguyen	11111117	Curriculum Committee	Active
Olivia Marie Rodriguez	11111118	Graduate Program Director Undergraduate Research Coordinator	Active

Note: Newly created Admin, Department Staff and Instructor accounts are inactive. You may activate Admin and Department Staff accounts through the “Account Management” page (see 5.1 User Account Management - Activating Deactivating accounts). Instructor accounts will automatically become active when courses or service roles are assigned. The Department Head account is active upon creation.

6. Common Features

6.1 Navigation Bar

The navigation bar is located on the left side of the screen and provides quick access to different sections of the system.

1. For Department Head/Staff, you'll see:

- a. Dashboard
- b. Performance
- c. Teaching Assignment
- d. Course
- e. Service Roles
- f. Member
- g. Create New Course/Role
- h. SEI Data Entry
- i. Meeting Log

PEFORMA

 Dashboard

 Performance

 Teaching Assignment

 Course

 Service Roles

 Member

 Create New Course/Role

 SEI Data Entry

 Meeting Log

2. For Instructors, you'll see:
 - a. Dashboard

b. Performance



3. For Admins, you'll see:
 - a. Account Management
 - b. Create Account

PEFORMA



Account
Management



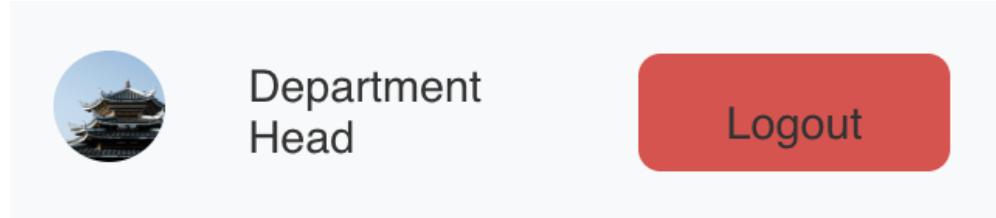
Create Account

To navigate to a different section, simply click on the desired option in the navigation bar.

6.2 Viewing Personal Information

To view and edit your personal information:

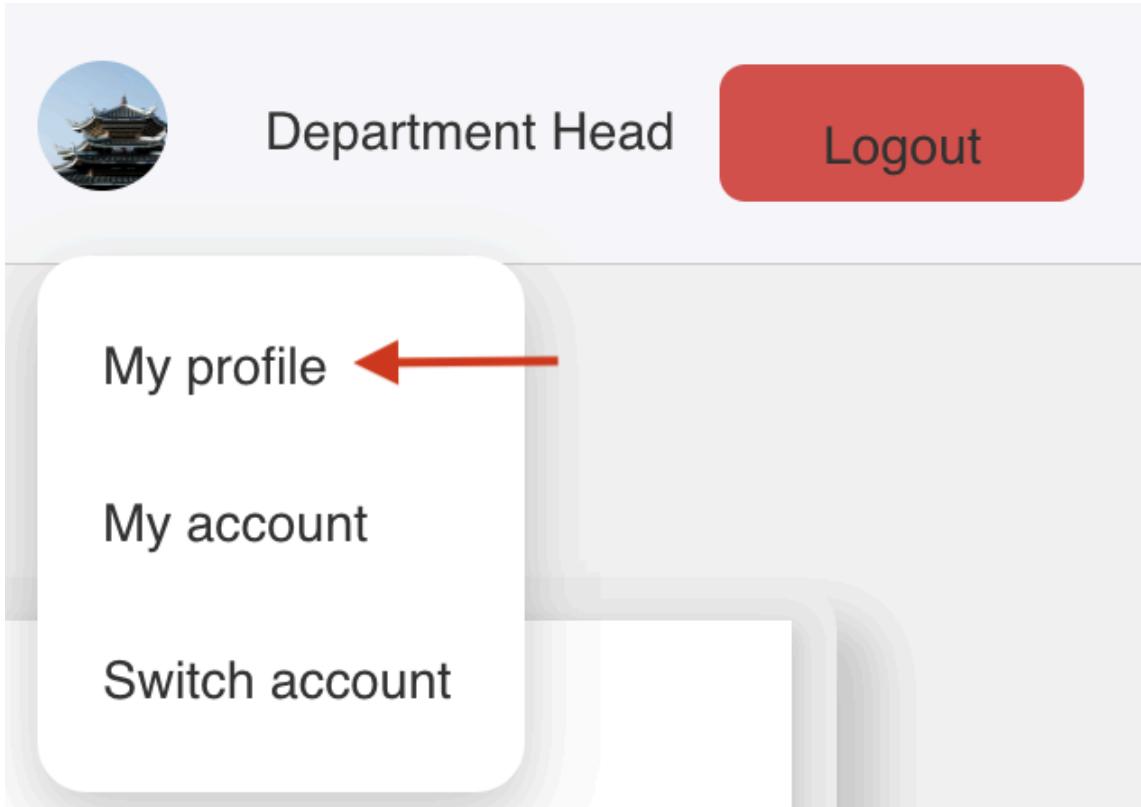
1. Click on your profile picture or initials icon in the top-right corner of the screen.



or



2. Select "My Profile" from the dropdown menu.



3. On your profile page, you can view your current information.

The screenshot shows the PEFORMA application interface. On the left is a dark sidebar with the word "PEFORMA" at the top and several menu items: Dashboard, Performance, Teaching Assignment, Course, Service Roles, Member, and Create New Course/Role. The main content area is titled "My Profile". At the top right, it displays "Performance Score 50.4". Below this is a circular profile picture of a traditional building, followed by the name "John Doe", the email "john.doe@ubc.ca", and the UBC ID "111111111". To the right of the profile picture is a small "Edit" button. The main content is divided into three sections: "Personal Information", "Teaching", and "Service". Under "Personal Information", there are fields for Office Location (SCI 101), Phone Number (250-555-1212), and Division (Computer Science). Under "Teaching", there are five listed courses: COSC 301 (Introduction to Data Analytics), COSC 341 (Human Computer Interaction), COSC 404 (Database System Implementation), COSC 414 (Computer Graphics), and COSC 444 (Computer Vision). The "Service" section is currently empty.

Remember, the specific information available may vary depending on your role in the system.

6.3 Editing Personal Information

To edit your personal information:

1. Click the "Edit" button.

This screenshot is identical to the one above, showing the "My Profile" page. However, a red arrow points to the "Edit" button located in the top right corner of the profile section. This indicates where the user should click to begin editing their personal information.

- The display will change to an editable form. Make any desired changes to your information in the input fields.

My Profile

Performance Score
50.4

Personal Information

Office Location: SCI 101

Phone Number: 250-555-1212

Division: Computer Science

Teaching

Current Course(s)

- COSC 301 (Introduction to Data Analytics)
- COSC 341 (Human Computer Interaction)
- COSC 404 (Database System Implementation)
- COSC 414 (Computer Graphics)
- COSC 444 (Computer Vision)

Service

Current Service Role(s)

Save Cancel

- To update your profile picture:
 - Click on your current profile image.

My Profile

Performance Score
50.4

Personal Information

Office Location: SCI 101

Phone Number: 250-555-1212

Division: Computer Science

Teaching

Current Course(s)

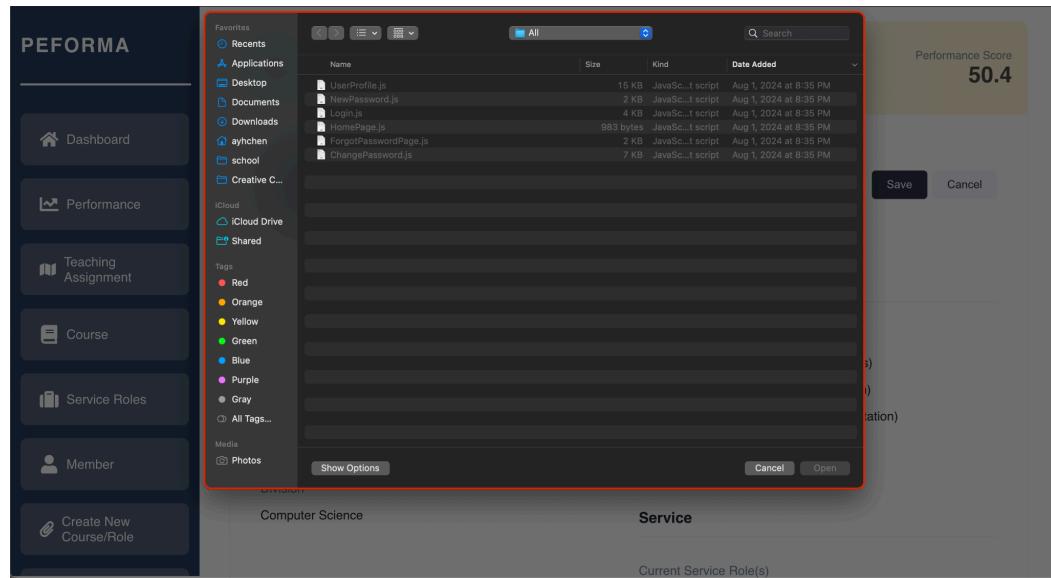
- COSC 301 (Introduction to Data Analytics)
- COSC 341 (Human Computer Interaction)
- COSC 404 (Database System Implementation)
- COSC 414 (Computer Graphics)
- COSC 444 (Computer Vision)

Service

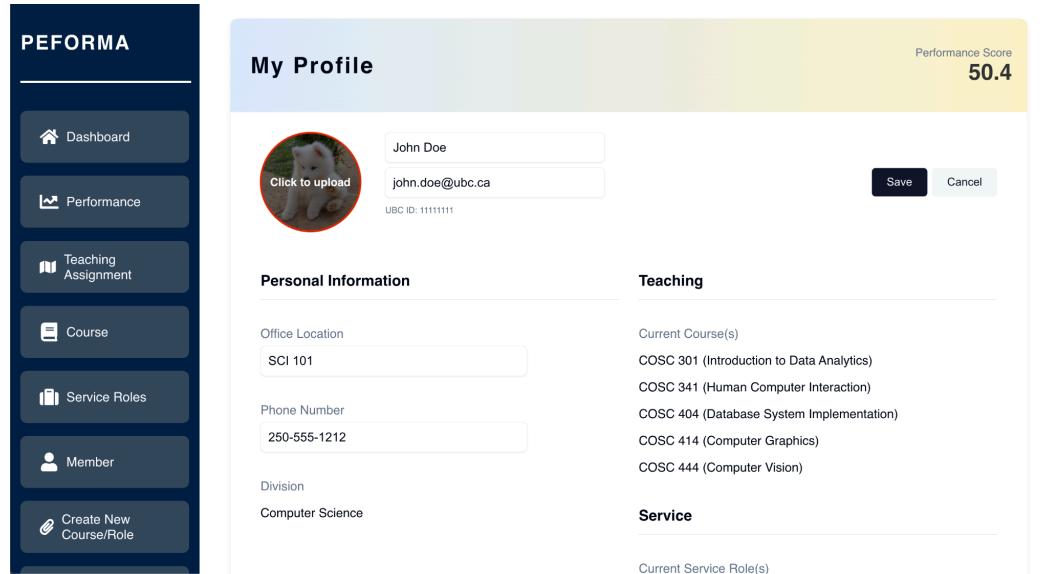
Current Service Role(s)

Save Cancel

- A file upload prompt will appear.



- Select a new image file from your device and the new image will replace your old image.



4. Once you've made all your changes:

- Click the "Save" button.

The screenshot shows the 'My Profile' edit screen. On the left is a dark sidebar with the word 'PEFORMA' at the top and several menu items: Dashboard, Performance, Teaching Assignment, Course, Service Roles, Member, and Create New Course/Role. The main area has a light blue header 'My Profile' and a yellow performance bar on the right showing a score of '50.4'. Below the header is a circular placeholder for a profile picture with the text 'Click to upload'. To its right is a form field containing 'John Doe' and 'john.doe@ubc.ca', with 'UBC ID: 11111111' below it. At the bottom right of this section are 'Save' and 'Cancel' buttons, with a red arrow pointing to the 'Save' button. The main content area is divided into sections: 'Personal Information' (Office Location: SCI 101, Phone Number: 250-555-1212), 'Teaching' (Current Course(s): COSC 301, COSC 341, COSC 404, COSC 414, COSC 444), 'Division' (Computer Science), and 'Service' (Current Service Role(s)).

- The system will process your changes and update your profile.

- After saving, your profile will return to the view-only display, showing your updated information.

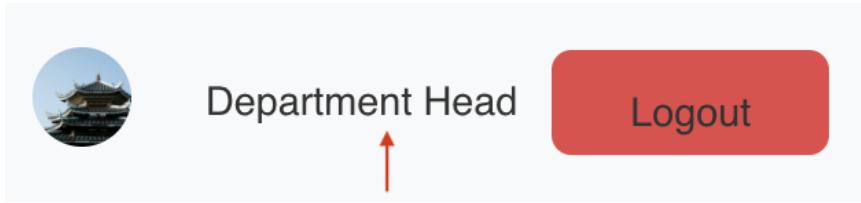
Note: If you decide not to make changes after clicking "Edit," click on the "Cancel" button to exit the edit mode without saving changes.

The screenshot shows the 'My Profile' view-only screen. The layout is identical to the edit screen, with the dark sidebar on the left and the light blue header 'My Profile' with a yellow performance bar on the right showing a score of '50.4'. The main content area includes a circular profile picture placeholder, a form field for personal information, and sections for 'Teaching', 'Division', and 'Service'. At the bottom right of the main content area are 'Save' and 'Cancel' buttons, with a red arrow pointing to the 'Cancel' button.

6.4 Viewing Account Type

In the top-right corner of the screen, you'll find your user profile information:

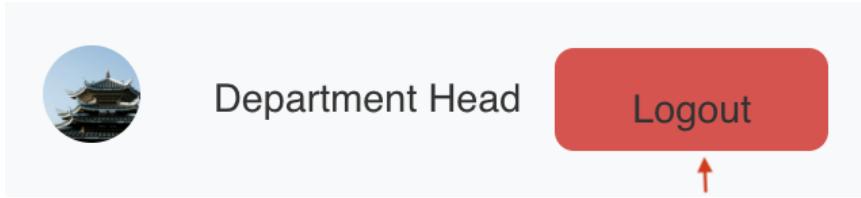
1. Your profile picture is displayed as a small circular icon.
2. Next to the picture, you'll see your role (e.g., "Instructor" or "Department Head").



6.5 Logout Button

To securely exit the system:

1. Locate the red "Logout" button in the top-right corner of the screen, next to your user profile.



2. Click the "Logout" button.
3. The system will log you out and return you to the home page.

Important: Always remember to log out when you're finished using the system, especially if you're using a shared computer.

6.6 Searching in Lists

Many pages in the system display information in list form. To search within these lists:

1. Look for a search bar, typically located at the top of the page.

The screenshot shows the PEFORMA application interface. On the left is a dark sidebar with various navigation options: Dashboard, Performance, Teaching Assignment, Course, Service Roles, Member, and Create New Course/Role. The main area has a header with a search bar containing "Search by Subject (e.g. COSC 111), Title (e.g. Computer Programming I)". Below the search bar is a user profile icon, "Department Head", and a "Logout" button. The main content area is titled "List of Courses (40 Active in current)". It features a table with columns: Course, Title, Description, and Status. A red arrow points to the search bar at the top of the list.

Course	Title	Description	Status
COSC 111	Computer Programming I	Introduction to the design, implementation, and understanding of computer programs. Topics include problem solving, algorithm design, and data and procedural abstraction, with emphasis on the development of working programs.	Inactive
COSC 121	Computer Programming II	Advanced programming in the application of software engineering techniques to the design and implementation of programs manipulating complex data structures.	Inactive
COSC 211	Machine Architecture	Organization and design of computer systems and their impact on the practice of software development. Instruction set architecture and assembly programming languages, design of central processing units (CPU), memory hierarchy and cache organization, input and output programming.	Inactive
COSC 221	Discrete Structures in Computing	Discrete structures in computing and relevant mathematical techniques. Logic and applications in automated reasoning and programming; proof techniques and analysis of algorithms and computation models; graph theory and graph models in computing; counting principles and discrete probability.	Active
COSC 222	Data Structures	Introduction to the design, implementation and analysis of data structures. Topics will include lists, stacks, queues, trees, and graphs.	Active
COSC 301	Introduction to Data Analytics	Software development and techniques for computation, analysis, and visualization of data. Manipulation of small and large data sets. Automation using scripting.	Active
COSC 303	Numerical Analysis	Numerical techniques for basic mathematical processes and their analysis. Taylor polynomials, root-finding, linear systems, eigenvalues, approximating derivatives, locating minimizers, approximating integrals, solving differential equations.	Active

2. Type your search query into the bar. For example:

The screenshot shows the PEFORMA application interface after a search. The search bar now contains "COSC 499". The main content area is titled "List of Courses (40 Active in current)". It features a table with columns: Course, Title, Description, and Status. Only one row is visible in the table, corresponding to the search term. A red box highlights the search term "COSC 499" in the search bar.

Course	Title	Description	Status
COSC 499	Capstone Software Engineering Project	A capstone project requiring team software development for an actual client. Students must produce a comprehensive report and deliver a formal presentation.	Active

3. The list will automatically update to show only items matching your search.

Course ↑	Title ↑	Description	Status ↑
COSC 499	Capstone Software Engineering Project	A capstone project requiring team software development for an actual client. Students must produce a comprehensive report and deliver a formal presentation.	Active

localhost:3000/DeptPerformancePage

- To clear the search and see all items again, delete your search query.

6.7 Sorting Lists

To sort a list:

- Look for sorting buttons in the lists' column headers.

Course ↑	Title ↑	Description	Status ↑
COSC 111	Computer Programming I	Introduction to the design, implementation, and understanding of computer programs. Topics include problem solving, algorithm design, and data and procedural abstraction, with emphasis on the development of working programs.	Inactive
COSC 121	Computer Programming II	Advanced programming in the application of software engineering techniques to the design and implementation of programs manipulating complex data structures.	Inactive
COSC 211	Machine Architecture	Organization and design of computer systems and their impact on the practice of software development. Instruction set architecture and assembly programming languages, design of central processing units (CPU), memory hierarchy and cache organization, input and output programming.	Inactive
COSC 221	Discrete Structures in Computing	Discrete structures in computing and relevant mathematical techniques. Logic and applications in automated reasoning and programming; proof techniques and analysis of algorithms and computation models; graph theory and graph models in computing; counting principles and discrete probability.	Active
COSC 222	Data Structures	Introduction to the design, implementation and analysis of data structures. Topics will include lists, stacks, queues, trees, and graphs.	Active
COSC 301	Introduction to Data Analytics	Software development and techniques for computation, analysis, and visualization of data. Manipulation of small and large data sets. Automation using scripting.	Active
COSC 303	Numerical Analysis	Numerical techniques for basic mathematical processes and their analysis. Taylor polynomials, root-finding, linear systems, eigenvalues, approximating derivatives, locating minimizers, approximating integrals, solving differential equations.	Active

- Click on the sorting button to sort the list by that column.

List of Courses (40 Active in current)

Course	Title	Description	Status
COSC 111	Computer Programming I	Introduction to the design, implementation, and understanding of computer programs. Topics include problem solving, algorithm design, and data and procedural abstraction, with emphasis on the development of working programs.	Inactive
COSC 121	Computer Programming II	Advanced programming in the application of software engineering techniques to the design and implementation of programs manipulating complex data structures.	Inactive
COSC 211	Machine Architecture	Organization and design of computer systems and their impact on the practice of software development. Instruction set architecture and assembly programming languages; design of central processing units (CPU), memory hierarchy and cache organization, input and output programming.	Inactive
COSC 221	Discrete Structures in Computing	Discrete structures in computing and relevant mathematical techniques. Logic and applications in automated reasoning and programming; proof techniques and analysis of algorithms and computation models; graph theory and graph models in computing; counting principles and discrete probability.	Active
COSC 222	Data Structures	Introduction to the design, implementation and analysis of data structures. Topics will include lists, stacks, queues, trees, and graphs.	Active
COSC 301	Introduction to Data Analytics	Software development and techniques for computation, analysis, and visualization of data. Manipulation of small and large data sets. Automation using scripting.	Active
COSC 303	Numerical Analysis	Numerical techniques for basic mathematical processes and their analysis. Taylor polynomials, root-finding, linear systems, eigenvalues, approximating derivatives, locating minimizers, approximating integrals, solving differential equations.	Active

- Click the same header again to toggle between ascending and descending order.

List of Courses (40 Active in current)

Course	Title	Description	Status
STAT 406	Environmetrics	Statistical concepts and methods in environmental science and management. Scientific problem-solving using statistical methods. Integration of the formulation of objectives, study design, and quantitative methods appropriate for the design. The role and use of statistical software packages.	Inactive
STAT 403	Stochastic Processes	Random walks, Markov chains, Poisson processes, continuous time Markov chains, birth and death processes, exponential models, and applications of Markov chains.	Inactive
STAT 401	Probability and Statistical Inference	Theory of statistical modelling: distributions of data, likelihood-based inference for learning unknown parameters, construction of confidence intervals and development of tests. Bayesian methods will be used to contrast standard statistical procedures.	Inactive
STAT 324	Mathematical Finance	Simple and compound interest, discount, force of interest, simple and general annuities, amortization of debts, bonds, depreciation, mortality tables, contingent payments, life annuities, insurance, and an introduction to financial derivatives.	Inactive
STAT 303	Intermediate Probability	Multivariate probability distributions, moment and generating functions.	Inactive
STAT 230	Introductory Statistics	Applied statistics for students with a first-year calculus background. Estimation and testing of hypotheses, problem formulation, models and basic methods in analysis of variance, linear regression, and non-parametric methods. Descriptive statistics and probability are presented as a basis for such procedures.	Inactive
STAT 205	Introduction to Mathematical Statistics	Sampling distribution theory. Likelihood. Parameter estimation. Confidence intervals and hypothesis testing; simple regression, analysis of variance and contingency table analysis.	Active

7. Contact Support

If you need additional assistance, please contact the UBC Okanagan IT team:

- Phone: (250) 807-9000
- Hours:
 - Monday-Friday, 7:30am-4:30pm PST (phone)
 - Monday-Friday, 10:00am-12:00pm and 1:00pm-3:00pm PST (walk-in)

