**Modification Log**

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| --- | --- | --- | --- |
| **Version** | **Modification date** | **Author** | **Comments** |
| 1.0 | July 4, 2016 | Evan Situ |  |
| 1.1 | August 29, 2016 | Evan Situ | Added section 6 and 8 and 1.4 |
| 1.2 | September 13, 2016 | Evan Situ | Added 9. Updating a Global Variable |
| 1.3 | September 16, 2016 | Evan Situ | Added Section 10 Force Check-In |
| 1.4 | September 26, 2016 | Evan Situ | Added 11.Update Course Information Input Template |
| 1.5 | October 20, 2016 | Michelle Zheng | Minor edits |

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# Pre-requisites

1. Admin access to McMaster Vena to Add or Remove user
2. Modeler/Admin access to run the ETL (Extract, Transform and Load) process
3. “AcademicYearTemplate.csv” to pass parameter into the ETL process
4. Annual Timeline

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Date** | **Task** | **Section Guide** | **Template** | **Task Owner** |
| Early Summer | Archive previous year data | A5 | Academic Year Template | Assoc Dean |
| Summer | Data copied over to next academic year | A4 |  | Assoc Dean |
| Summer | Update global variable to the new year and term | A9 | Input Variables Template | Assoc Dean |
| Summer | Add new courses | A7 |  | Assoc Dean, Department |
| Summer | Changes to programs (mapping b/w courses and programs) | D5 |  | Department |
| Summer | Assign instructors to courses | ? | Template discussed on Sept 26 | Department |
| Summer | Curriculum mapping, will require consultation and verification with Instructors | D2.3 | Curriculum Mapping Input Template | Department Attributes Committee |
| Summer | Measurement mapping | D2.2 | Measured Indicators Input Template | Department Attributes Committee |
| Aug/Sep | Instructor reviews continuous improvement plan from the previous year | I3.1 | Curriculum Committee Recommendations Report (Previous Year) | Instructor |
| Jan | Instructor enters rubric and their continuous improvement plan for Term 1 | I2 | Rubric Input Template, Course Report | Instructor |
| March | Update global variable for the new term (after Term 1 data entry is complete) | A9 | Input Variables Template | Assoc Dean |
| Dec/Jan | Instructor reviews continuous improvement plan from the previous year | I3.1 | Curriculum Committee Recommendations Report (Previous Year) | Instructor |
| Early May | Instructor enters course reports for Term 2 | I2 | Rubric Input Template, Course Report | Instructor |
| May | Curriculum committees review course reports, generate continuous improvement plan report | I4, D3 | Course Report, Curriculum Committee Recommendations Input Template | Department |
| June | Meeting of continuous improvement committee (external advisors students) |  |  | Department |
| June | Departments plan curriculum revisions |  |  | Department |
| September | Faculty reviews departmental committee reports, writes report |  | ? | Faculty |
| All Year | Add/Remove manage users | A2 |  | Assoc Dean? |
|  | View Historical Data | A6 |  |  |
|  | Assign Users to Process | A3 |  |  |

# Add User

* 1. Login to <https://us1.vena.io/administrator>
  2. Under “Admin” 🡪 “Users” 🡪 “Add User”



* 1. Fill in the user information and select the login types 🡪 Click “Save”



# Assign User to Process

* 1. After login to Vena 🡪 Under “Manager”🡪Click “Designer”🡪Click on the task or activities you want to assign users to.



* 1. Double Click on the Task 🡪on the “Task Detail” windows 🡪 Click “Users”🡪Type the User name that you want to add (you can add users to different roles in the process (Owners, Support Workers, Watchers), please refer to the detail documentation for the differences of each role 🡪 Click “Save”



# Start New Academic Year

* 1. Since the current year’s curriculum mapping, measured as well as rubric information will be used as the starting point for a new academic year. An automated ETL process in Vena is built to accomplish this task.
  2. Open the input template “AcademicYearTemplate.csv” 🡪enter the new academic year data in cell “A1” (format yyyy-yyyy) 🡪 Save



* 1. Click on “Modeler” 🡪 “Data Modeler” 🡪 “ETL” 🡪 “Import”🡪Click the “Run” button () on “New Academic Year”



* 1. On the open windows, click “Choose File”🡪select the “AcademicYearTemplate.csv” from step 2 🡪 Click “Import”



* 1. You will now see the ETL Status “RUNNING” 🡪 once the ETL job is completed, the status will become “COMPLETED” (it will take about 5-10 minutes to complete the ETL job, you can click the refresh button above the “Status” to refresh)
  2. 



* 1. After the ETL is completed, you should see the data appear under the “Year” dimension



# Historical Program Measurement Archive

* 1. Please only archive the program measurement when the program is fully completed. The purpose of archiving the program measurement data is to track the historical trend of a program.
  2. The purpose of archiving the data is so that the historical program measurement report can be generated.
  3. Open the input template “AcademicYearTemplate.csv” 🡪enter the new academic year data in cell “A1” (format yyyy-yyyy) 🡪 Save



* 1. Click on “Modeler” 🡪 “Data Modeler” 🡪 “ETL” 🡪 “Import”🡪Click the “Run” button () on “Historical Program Measurement Archive”



* 1. You will now see the ETL Status “RUNNING” 🡪 once the ETL job is completed, the status will become “COMPLETED” (it will take about 5-10 minutes to complete the ETL job, you can click the refresh button above the “Status” to refresh)

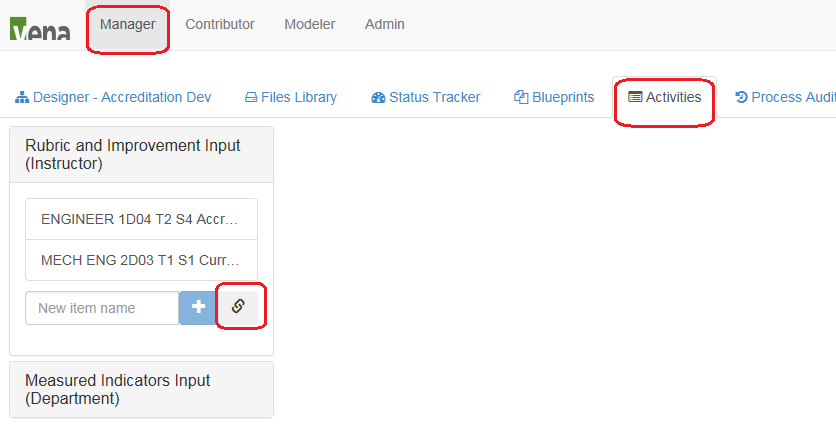
# Historical Program Measurement Report

Once the archive is completed, the historical program data will be available in the “Historical Program Measurement Report”. (The historical program measurement report will not work for any year’s data that has not yet been archived.)

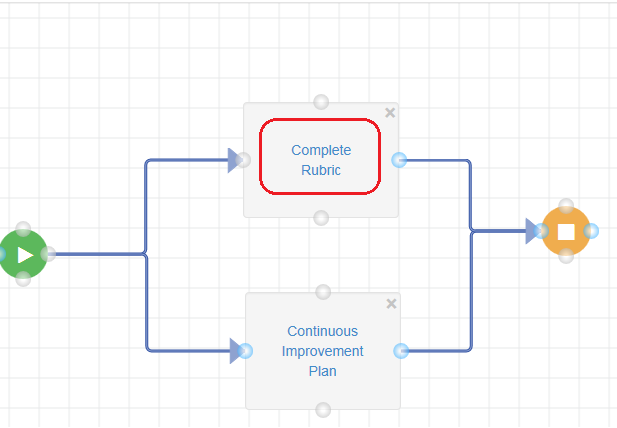


# Add New Course to the Process

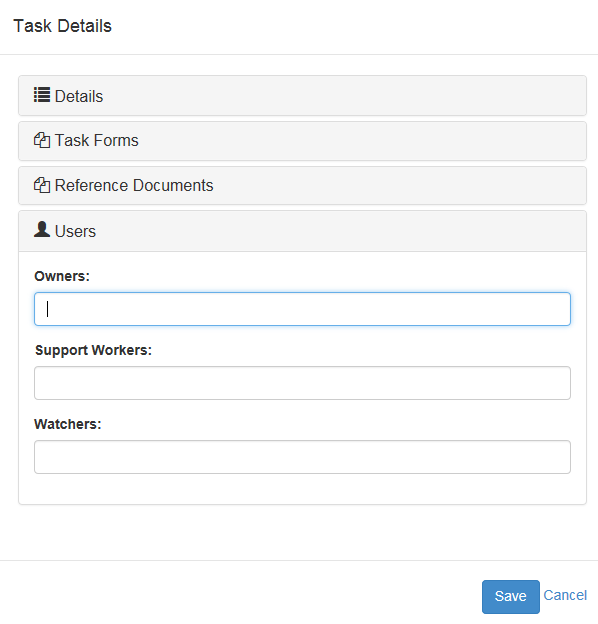
* 1. Use blueprints to create a new course will be an easier option🡪Login to Vena🡪Click on use blueprints to create activity icon



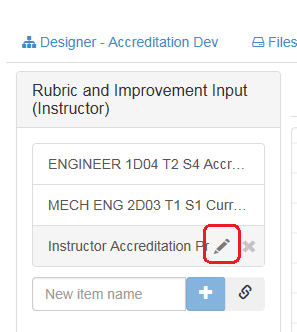
* 1. Select the blueprint “Instructor Accreditation Process”
  2. Double click on task “Complete Rubric”



* 1. Under “Details”, enter the instructions and due date 🡪Under task forms, attach the “Rubric input template”🡪under users, assign owners and support workers to this task.



* 1. Rename the process by click on rename icon and enter the name



# Edit Courses and Programs Mapping

* 1. Login to Vena as Modeler or Admin
  2. Click on “Modeler” at the top navigation bar
  3. Click on “Program” at the left navigation bar
  4. Expand the “Member Name” 🡪Right Click at a course or program you would like to move🡪Click “Cut” 🡪Select destination parent member🡪Right Click then choose “Paste”
  5. The above process can also be done by dragging and dropping the child member to the parent member

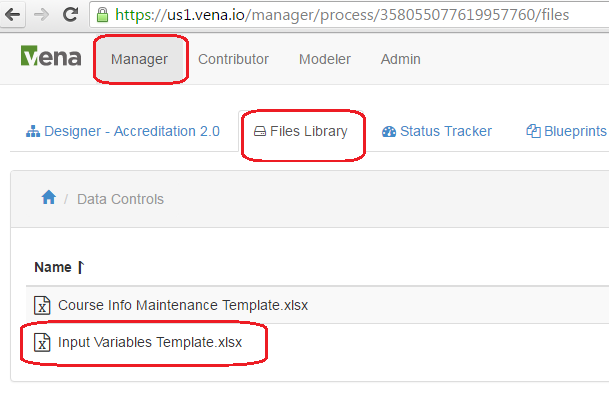


# Updating a Global Variable

Below are the steps to successfully update a Global Variable:

(Updated the term global variable will help to prevent enter the incorrect term/year in the input templates)

* 1. Open your Vena Global Variable template “Input Variables Template” (you can find this template at Manager🡪Files Library)



* 1. Select the cell with the value of the Global Variable 🡪Click “Edit Template”



* 1. Click on Add/Edit Variable -> Metadata (must be in Edit Template mode)



* 1. Update the respective variable with the new member (only a single member can be in a global variable)



* 1. Close the variable window and Save Template

# Force Check-In

A task has been checked out by a user who is unavailable and it needs to be checked back in. Please follow the following steps:

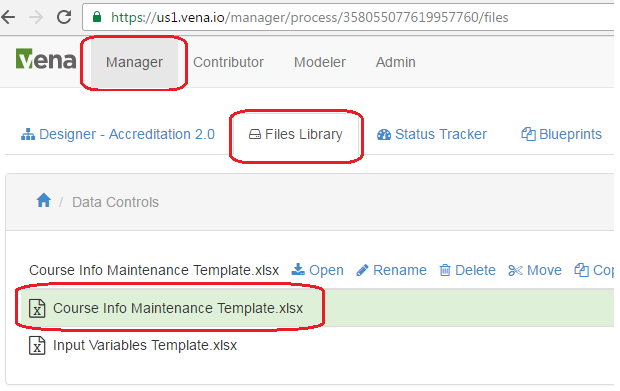
* 1. Login as a manager
  2. Go to Status Tracker
  3. Find the checked-out task assigned to the user
  4. Right click on the status of the task and hit Force Check-In



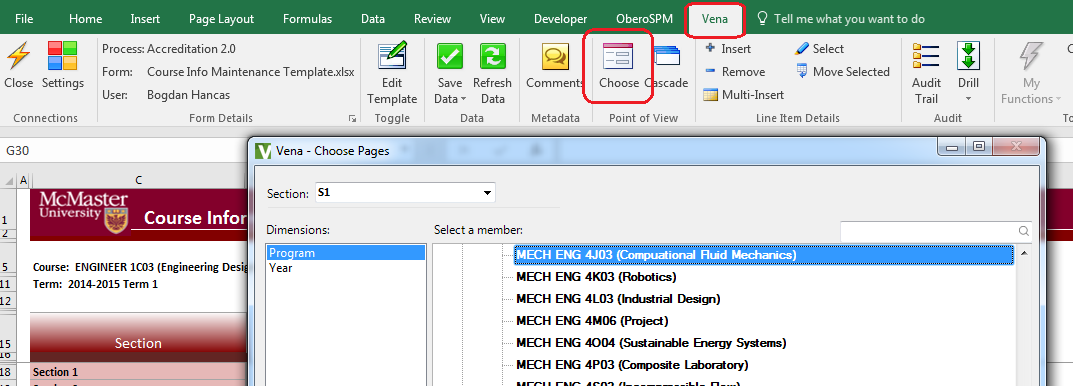
# Update Course Information Input Template

In order for the name of the instructor to show up on the course report, the “Course Information Input Template” will need to be updated each term.

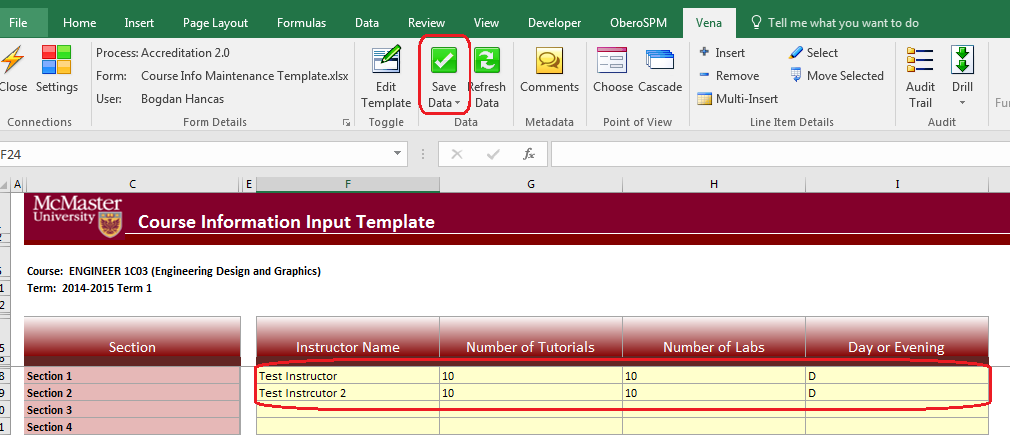
* 1. Sign into Vena.io 🡪Under Manager🡪Files Library🡪Data Controls🡪Open the “Course Information Input Template”



* 1. Under “Vena” Tab Click “Choose”🡪 Pick the course and the year you want to edit



* 1. Enter the required information 🡪 Click “Save Data”



# Other Vena Resources

* 1. For detail documentation, please refer to the previous document.
  2. To submit an issue, please fill out <http://goo.gl/forms/I3kDnsUl46>
  3. For Vena training or user manual, please refer to <http://docs.vena.io/>
  4. For other helps please contact:
* Bogdan Hancas: [bhancas@venasolutions.com](mailto:bhancas@venasolutions.com)
* Evan Situ: [esitu@venasolutions.com](mailto:esitu@venasolutions.com)