



SRI Coordinator Training

The SRI survey system at the University of Manitoba follows a series of steps outlined below.

1. **SRI Coordinators** are tasked with verifying the following course information in their departments:
 - Course end date (i.e., last date of scheduled class)
 - Instructor(s) teaching the course (i.e., assigning, removing)
 - Instructor email address (i.e., official UM email address)
 - Whether a given pair of courses should be merged so that one course evaluation is generated for the pair
2. **Instructors** can add up to five instructor-selected questions to the Core survey questions.
3. **Students** complete the University of Manitoba Course survey.
4. **Instructors, department heads and deans** receive the SRI survey reports.

What can SRI Coordinators expect?

Step 1. Before you enter the SRI survey system (Explorance Blue), please gather the following information for each course from Aurora:

- Last official date of scheduled classes
- All instructors teaching each course, including their first names, last names and UM issued email addresses
- Whether a given pair of courses should be merged so that one course survey is generated for the pair

Step 2. SRI Coordinators will receive an email with a link to complete the verification tasks for each course. Click on the link in the email showing the current term to complete the tasks.

Dear Nancy Fischer,

The SRI course verification period has begun and, as a designated SRI Coordinator for your unit, you are asked to verify your area's course information at this time.

Please log in (using your UM authenticated credentials) to the following link where you will see a list of the courses that are starting for the upcoming term. **You may receive further email invitations for other courses if they start on different dates.**

[Review and Publish the data assigned to you for Winter 2024 SRI Coordinator Tasks \(DIG\)](#)

Set some time aside to do the following:

- Verify the end dates for each course (i.e., last day of scheduled classes).
- Identify the instructor(s) teaching each course and assign/remove as needed.
- Confirm each instructor's official UM (faculty) email address.
 - If an instructor hasn't been hired yet for a course, let us know at sri@umanitoba.ca and we can walk you through the next steps.
- Identify which courses should be merged and who the instructor(s) are.
 - Note: You can only merge courses provided they are taught by the **same instructor(s), are held at the same day/time and in the same location.**
- Don't forget to Publish all your courses!

SRI Coordinator training materials, including step-by-step instructions, can be found in 'Resources for SRI Coordinators and instructors' > [SRI Coordinator training](#).

If you require further support, please contact our team at sri@umanitoba.ca.

Kind regards,

On behalf of the UM SRI Management Team

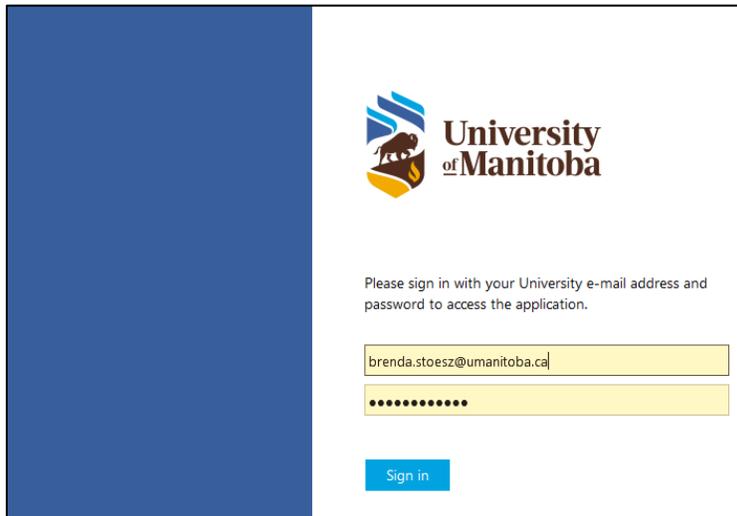


**University
of Manitoba**

UM SRI

Step 3. Log into the SRI system

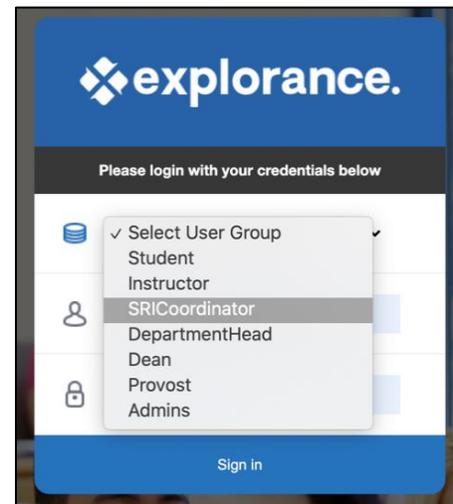
You will be directed to the single sign on (SSO) page where you will enter your University of Manitoba email and password (left image). In some cases, you may be directed to an Explorance sign-in page (right image) where you must click the pull-down for 'Select User Group' and select **SRI Coordinator**.



University of Manitoba logo and text: "Please sign in with your University e-mail address and password to access the application."

Input fields: `brenda.stoesz@umanitoba.ca` and a masked password field.

Sign in button.



explorance. logo and text: "Please login with your credentials below"

Select User Group dropdown menu:

- Student
- Instructor
- SRICoordinator**
- DepartmentHead
- Dean
- Provost
- Admins

Sign in button.

- Step 4.** For each course section in your list of courses to verify, click **Edit** and ensure that the following are correct:
- Course end date (i.e., last date of scheduled class)
 - Assign or removing instructor(s)
 - Instructor email address (i.e., official UM faculty email address)



IMPORTANT: If multiple SRI Coordinators exist within your faculty/department, ensure that you verify the course information for only the courses that have been assigned to you.

Edit courses -
(0 selected / 4 found)

<input type="checkbox"/>	Status	Group	Name	Term	Faculty/College	Department/Unit	Course Start Date	Course End Date	Actual Enrollment
<input type="checkbox"/>	● Edit	• 1 Instructors	ABIZ0440 - A01 - Agricultural Economics & Marketing 1	202110	School of Agriculture	Agribusiness and Agric Econ	2021-Jan-05 00:00	2021-Mar-30 00:00	55
<input type="checkbox"/>	● Edit	• 1 Instructors	ABIZ0470 - A01 - Financial Management 2	202110	School of Agriculture	Agribusiness and Agric Econ	2021-Jan-05 00:00	2021-Mar-30 00:00	59
<input type="checkbox"/>	● Edit	• 1 Instructors	ABIZ0470 - B01 - Financial Management 2	202110	School of Agriculture	Agribusiness and Agric Econ	2021-Jan-05 00:00	2021-Mar-30 00:00	35
<input type="checkbox"/>	● Edit	• 1 Instructors	ABIZ0470 - B02 - Financial Management 2	202110	School of Agriculture	Agribusiness and Agric Econ	2021-Jan-05 00:00	2021-Mar-30 00:00	24

Step 4a. Include SRI (yes/no): The default for this field is **Yes**. If you have any course(s) that you feel do not require an SRI survey (e.g., practicum only courses, UW-owned courses), please contact sri@umanitoba.ca and let us know. We will provide a request form that, once filled out, we will send to be reviewed and signed off by a designate in the Vice Provost's Office on your behalf.

Step 4b. Course end date (i.e., last official date of scheduled class): If the course end date is not accurate, click the calendar icon to modify it and select the correct course end date.

Course End Date
2021-Mar-30

March 2021

Sun	Mon	Tue	Wed	Thu	Fri	Sat
28	01	02	03	04	05	06
07	08	09	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30	31	01	02	03
04	05	06	07	08	09	10

Today Clear Close

Instructors	ABIZ0470 - A01 - Financial Management 2	202110	School of Agriculture	Agribusiness and Agric Econ	2021-Jan-05 00:00	2021-Mar-30 00:00	59
-------------	---	--------	-----------------------	-----------------------------	-------------------	-------------------	----

Step 4c. Assign instructor(s): Click the arrow to open the instructor panel. To remove an instructor, click the 'x' next to the 'First name'. To add an instructor to multiple-instructor course, click 'Assign Instructors' and search for their name in the **Group member(s)** field. Click the blue icon to assign the instructor to the course.

Instructors

Valid

First Name: Chad

Last Name: Lawley

Email: Chad.Lawley@umanitoba.ca

Assign Instructors

Assign group member

Group member(s): stoesz

Search other fields: Select filtering field

First Name	Last Name	Select field
Brenda	Stoesz	

Cancel

Step 5d. Add instructor(s): If you are unable to find an instructor using the **Assign** feature, please contact SRI@umanitoba.ca and provide the instructor name (first name, last name), UMNEDID (if known), instructor UM issued email address.

Step 5e. Instructor email address: Verify the accuracy of the instructor email address and change if necessary.



TIP: The instructor email address must be an official UM faculty email address to show as *Valid*.

Step 5. Click **Save** for a given course to save your changes.

Status **Group**
 Save **Cancel** • 1 Instruc
● Valid
Name
 ABIZ0440 - A01 - Agricultural Economics &

Step 6. Merge courses that have qualified to be merged.

You can merge courses if they are taught by the **same instructor**, held at the **same time** and in the **same location**.

To merge courses, place a check to the left of each course that should be merged. Next, click 'Edit courses' and then **Merge courses**. Repeat this step for each set of courses that should be merged.

		Group	Name	Term	Faculty/College	Department/Unit	Course Start Date	Course End Date	Actual Enrollment
<input type="checkbox"/>	● Edit	• 1 Instructors	ABIZ0440 - A01 - Agricultural Economics & Marketing 1	202110	School of Agriculture	Agribusiness and Agric Econ	2021-Jan-05 00:00	2021-Mar-30 00:00	55
<input type="checkbox"/>	● Edit	• 1 Instructors	ABIZ0470 - A01 - Financial Management 2	202110	School of Agriculture	Agribusiness and Agric Econ	2021-Jan-05 00:00	2021-Mar-30 00:00	59
<input checked="" type="checkbox"/>	● Edit	• 1 Instructors	ABIZ0470 - B01 - Financial Management 2	202110	School of Agriculture	Agribusiness and Agric Econ	2021-Jan-05 00:00	2021-Mar-30 00:00	35
<input checked="" type="checkbox"/>	● Edit	• 1 Instructors	ABIZ0470 - B02 - Financial Management 2	202110	School of Agriculture	Agribusiness and Agric Econ	2021-Jan-05 00:00	2021-Mar-30 00:00	24

A **Confirm Merge** message will appear, allowing you to confirm the courses selected for merging. Click **Yes** to complete the merge.

Confirm Merge

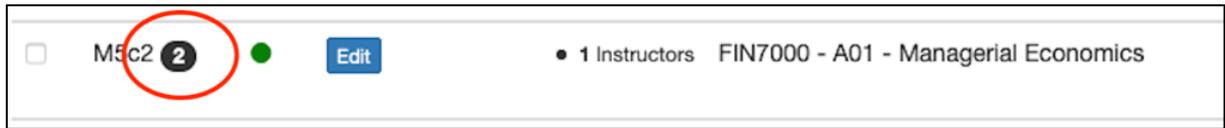
Are you sure you want to merge all selected courses?

Courses to be merged:

« ‹ 1 › »

	Name	Term	Faculty/College	Department/Unit	Course Start Date	Course End Date	Actual Enrollment	Include_SRI
<input checked="" type="checkbox"/>	ABIZ0470 - B01 - Financial Management 2	202110	School of Agriculture	Agribusiness and Agric Econ	2021-01-05 00:00	2021-03-30 00:00	35	Yes
<input checked="" type="checkbox"/>	ABIZ0470 - B02 - Financial Management 2	202110	School of Agriculture	Agribusiness and Agric Econ	2021-01-05 00:00	2021-03-30 00:00	24	Yes

The newly merged course will be displayed in the task list with the number of courses that were merged next to it (e.g., '2', '3').



Completing the remaining steps for a merged course will be done within the **first tab** within a merged course. Notice that the 'Name' of the merged course is a combination of the names of the original courses. The other tabs represent the original courses and will not be editable.

A screenshot of the course edit form for the merged course 'M5c2'. The 'Name' field contains the combined names of the original courses: 'FIN7000 - A01 - Managerial Economics;FIN7000 - G01 - Managerial Economics'. The 'Term' is '202110', 'Faculty/College' is 'Faculty of Management', 'Department/Unit' is 'Accounting and Finance', 'Course Start Date' is 'yyyy-MMM-dd HH:mm', 'Course End Date' is '2021-Mar-21', and 'Include_SRI' is set to 'Yes'. The 'M5c2' label and the '2' in a red circle are also visible at the top left of the form.

Step 7. Repeat for each course on your list. If any courses are missing from your list, contact sri@umanitoba.ca and provide the course code(s).

Step 8. When all course sections have been validated, click the Check Box at the top of the course section list to check all course sections. Click **Edit courses** and select **Publish courses**.



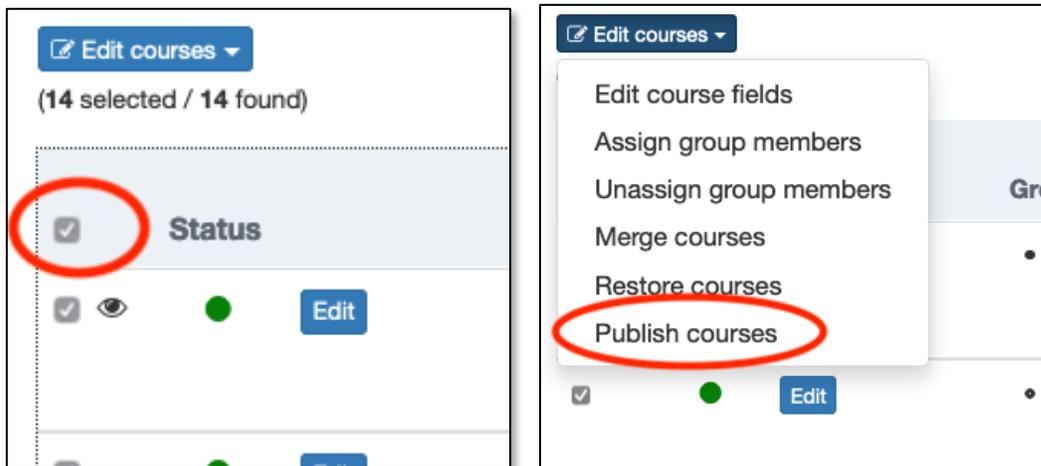
IMPORATNT: If multiple SRI Coordinators exist within your faculty/department, ensure that you are publishing courses for only those courses assigned to you.

Step 9. Last step – Publish your courses!

When you Publish your courses, the colored dot beside each course will turn to blue. You want all dots to be blue.

To do this, click the box beside the course you have confirmed is correct, open the **Edit courses** dropdown menu and select **Publish courses**. The **Confirm Publish** screen will pop-up (scroll to the right to view all fields). Please confirm that the course information is correct by clicking **Yes**.

Whether or not you have made changes to the course information, you must publish all courses in your task list. If this step is missed, the course survey(s) will not be generated.



Confirm Publish

Are you sure you want to publish all selected courses?

Courses to be published:

« < 1 > »

	Name	Term	Faculty/College	Department/Unit	Course Start Date	Course End Date	Actual Enrollment	Include_SRI
<input checked="" type="checkbox"/>	ABIZ0440 - A01 - Agricultural Economics & Marketing 1	202110	School of Agriculture	Agribusiness and Agric Econ	2021-01-05 00:00	2021-03-30 00:00	55	Yes
<input checked="" type="checkbox"/>	ABIZ0470 - A01 - Financial Management 2	202110	School of Agriculture	Agribusiness and Agric Econ	2021-01-05 00:00	2021-03-30 00:00	59	Yes
<input checked="" type="checkbox"/>	ABIZ0470 - B01 - Financial Management 2	202110	School of Agriculture	Agribusiness and Agric Econ	2021-01-05 00:00	2021-03-30 00:00	35	Yes
<input checked="" type="checkbox"/>	ABIZ0470 - B02 - Financial Management 2	202110	School of Agriculture	Agribusiness and Agric Econ	2021-01-05 00:00	2021-03-30 00:00	24	Yes

Step 9. Congratulations for completing your course information verification tasks! You may now close your browser window.

Support

If you have questions or experience issues completing the SRI Coordinator verification tasks, please contact SRI@umanitoba.ca.