An Overview of Evaluation Management System

Phase 1 – Research Tracking and Admissions

Key Benefits to the Institution
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Table of Contents

Table of Contents ................................................................. 3
Change History ................................................................. 4
Executive Overview ......................................................... 5
What are the Key Features and Benefits for Institutions? .......... 7
Conclusion ......................................................................... 15

Please note: this document is current as of Additional Features July 2012.
## Change History

<table>
<thead>
<tr>
<th>Release</th>
<th>Change Summary</th>
</tr>
</thead>
<tbody>
<tr>
<td>Additional Features January 2012</td>
<td>First release of the Evaluation Management Benefits Document</td>
</tr>
<tr>
<td>Additional Features July 2012</td>
<td>Evaluation Management System attachment functionality introduced along with new screenshots displaying the attachment link</td>
</tr>
</tbody>
</table>
Executive Overview

The continued changes and demands on higher education institutions globally, and the growing diversity of the Campus Solutions customer base, has provided the opportunity for modernization of the core business processes that form the foundation of Campus Solutions. Diversity in the Campus Solutions customer base has also meant ‘diversity’ in education models and business processes. The ability to evaluate applicants and students throughout their student lifecycle is becoming increasingly important, as institutions seek to admit and retain the most qualified students, and provide efficiency gains in their business processes against a backdrop of reduced budgets and more competition.

While Campus Solutions has an existing application evaluation process, it is currently tied to the Admissions module and does not provide the ability to reuse the evaluation feature against other modules within Campus Solutions or for any other part of the student lifecycle. The current application evaluation process will remain unchanged by the introduction of the new Evaluation Management feature.

The Evaluation Management System (EMS) is not tied to a single business process within Campus Solutions (such as evaluating applications for Admissions); it is intended to create a generic evaluation solution that can, in future releases, be leveraged across Campus Solutions. In the first phase of Evaluation Management the focus is on supporting the new Research Tracking feature and current Admissions functionality, where there is a requirement to be able to track and evaluate applicants and research candidates throughout all phases of their candidature lifecycle. This provides institutions with the ability to evaluate any type of application (for example, research candidate applications) based on institutional criteria to make a decision on whether the candidate is eligible to be admitted.

The evaluation of a research candidate’s thesis after it has been submitted is a critical business process that needs to be monitored and managed, with all outcomes and results recorded either by individual examiners or by single or multiple committees. The feature is flexible enough to support many different models of an evaluation review, and is not specifically linked to Research Tracking evaluation. It will provide institutions with the ability to determine what will be evaluated, such as the application, thesis, assigned evaluators, examiners, committees, and the ability to determine and configure the business process for the evaluation itself. The feature builds on the existing committee functionality and provides an administrative evaluation structure where the evaluation process can be managed. Evaluation Management also provides the ability for institutions to have a multi-stage or -level review
process by supporting a hierarchical committee structure; this in turn can determine the order in which the evaluation -- such as a thesis or application -- should be considered and reviewed. The committee structures can be used either as part of a standard or research application process, or as part of thesis evaluation. In addition to supporting committee structures, the feature also supports evaluations where the process is undertaken by individual examiners or supervisors.

The first phases provided the administrative structure that is required to support and manage the evaluation processes in future releases. The administrative component stores the evaluation data for a research candidate and evaluations can be added and maintained through this component. In addition to manual maintenance, EMS provides institutions with the ability to assign, create, update, and delete evaluations using a batch process. Recognizing that application and research business processes are often different between institutions, the ability to define and configure user-defined values for recommendations and statuses provides institutions with flexibility when defining the business process flow. The ability for institutions to store attachments against each of the evaluation pages was introduced in Additional Features 2012, along with the ability to copy similar evaluation setup from one evaluation category to another.

In future releases we plan to provide a self-service evaluation center that will support the entry of evaluation results by an internal or external evaluator. We plan to support content management for those involved in the evaluation process, enabling them to view data and materials related to the evaluation, such as test scores, grades, recommendations, and essays. By providing a 360-degree view of an individual application, we plan to support collaboration among evaluators, committee members, administrators, and support for evaluation. Finally, we plan to provide integrated workflow and notifications for evaluators, committees, and administrators, and a rules-based engine to support automated evaluation results.

We anticipate that in future releases EMS could be used for determining scholarships and grants within Financial Aid, determination of Honors and Awards, and the evaluation of a student’s internship or work experience performance. EMS may also be used to determine privileges that might be applied to an individual based on a point or rating system, or to evaluate volunteers to establish who can best carry out different activities on campus, such as a parents’ association, alumni association, foundation efforts, and so on.
The Evaluation Management feature will be delivered over multiple phases, likely occurring over the next 12-18 months. While we do not expect customers to be able to deploy the generic evaluation structures delivered to date, we recommend that customers begin evaluating the new structures and start to analyze how these features can be used and leveraged within their own institution.

As part of the Additional Features for January and July 2012, the core setup, configuration, and administrative structural support for Evaluation Management were delivered to aid this customer evaluation and analysis.

As Campus Solutions builds out the total solution, we believe institutions will see ways in which the Evaluation Management feature can be configured and used within their institution to manage the research candidate lifecycle evaluation process. We anticipate institutions will see ways to improve the administrative efficiency of evaluating applicants and candidates, the ability to record more detailed results or feedback from each committee or individual examiner, and to improve the turnaround time of result outcomes.

What are the Key Features and Benefits for Institutions?

Evaluation Management will be delivered over multiple phases. Institutions will therefore see the benefits of these new features being realized on a continuous basis, in line with the phased approach enabled by our continuous delivery model.

While customers will be able to assess and evaluate the capabilities offered by these new features, they will not be able to utilize them until the overall solution is delivered. Logically, a customer will not be able to use the setup, configuration, and administrative components for the feature without the processing support, workflow, rules engine, and the user interface for evaluators, administrators, and faculty. The Campus Solutions phased delivery approach allows customers to evaluate and begin planning for adoption early in the cycle of delivering significant new functionality.

The first phases of Evaluation Management focus on committee structures and the evaluation processes, providing both the structural and administrative components to support future releases.
The following list provides a summary of the key benefits of Evaluation Management:

- One of the main benefits of Evaluation Management is that it will provide institutions with a generic evaluation structure that is supported by an administrative component: **Manage Student Evaluations.** It provides institutions with a one-stop shop for evaluations-related information, and the component can hold either individual or committee evaluator outcomes or ratings for applicants or research candidates.

- Ability to create individual or hierarchical relationships between committees, where a thesis or application may need to be evaluated by more than one panel or committee in a specific evaluation order.

- Ability to support many different types and levels of evaluation review; for example, an application or thesis being evaluated by individual examiners or by multiple committees may require the ability to record the recommendations of each. Also, there is the ability to configure what is to be evaluated (such as an application/thesis) and who will evaluate it (such as committees or individual examiners).

- Another key benefit of Evaluation Management is the ability to create, assign, and delete evaluation items using a batch process based on the institution’s requirements and business processes. This will help to reduce the administrative burden of assigning and maintaining evaluations for applicants and research candidates, as well as helping to streamline the business flow.

- Ability to restrict access to a particular evaluation category and/or code, providing either inquiry or update access that is based on a user ID. This ensures that institutions are able to secure the update of an applicant or research candidate’s evaluation result or outcome.

- Provides the platform on which workflow between administrators, evaluators, and committees will be based, as well as provide the basis for automatic evaluation processing (**planned for future releases**).

- Provides the foundation and structure for recording results or outcomes that may have been calculated or evaluated by a Rules Engine (**planned for future releases**).
• Ability to store documentation, such as a thesis or examiner’s reports, as attachments.

Let’s take a look at the key features delivered in Evaluation Management – Research Tracking and Admissions released as part of the Additional Features for January and July 2012.

Manage Student Evaluations

Evaluation Management builds upon the existing committee structures within Campus Solutions and provides new setup, configuration, and administrative pages that will enable institutions to define the evaluation business process flow for general admissions and research tracking.

Manage Student Evaluations is an administrative component that provides a one-stop shop for administrators to be able to manage the evaluation process. The Evaluation Overview page provides a high-level overview of the applicant or research candidate’s evaluation record including the current status of the evaluation, such as assigned, in-progress, or completed. After all the evaluations have been completed, the overall final recommendation or result can be entered, along with any recommended prizes to be awarded, and any associated comments or remarks. Although in the first phases of delivery this final recommendation must be populated manually, in future planned releases the final recommendation or result may be calculated or evaluated by a rules-based engine.

The evaluation of an applicant or research candidate may be undertaken by individual evaluators or by committees and these are displayed on the Evaluation Overview page. In this example there are two committee schemes, thesis examination and oral defense. These two committees will be responsible for examining and evaluating the candidate’s thesis and also hearing and evaluating the oral defense. The example also contains an individual evaluator scheme in which a supervisor may undertake a first review of the thesis prior to submission for examination. The page also provides institutions with the ability to upload, store, and view attachments against the overall evaluation, which may be used to record the meeting notes and decisions of committees, evaluators, or examiners. This feature can also be used as part of the Admissions module for the evaluation of any type of applicant or application. An example of the Manage Student Evaluations component is shown below displaying the Evaluation Overview page.
Evaluation Management System

**Committee Schemes**

<table>
<thead>
<tr>
<th>Committee Scheme</th>
<th>Order</th>
<th>Rating Scheme</th>
<th>Evaluation Status</th>
<th>Status Date</th>
<th>Recommendation</th>
<th>Overall Rating</th>
</tr>
</thead>
<tbody>
<tr>
<td>THESESEXAM</td>
<td>2</td>
<td>THESESEXAM</td>
<td>CMPLT</td>
<td>13/12/2011</td>
<td>PASS</td>
<td>2.53</td>
</tr>
<tr>
<td>ORLDEFIN</td>
<td>3</td>
<td>THESESEXAM</td>
<td>CMPLT</td>
<td>13/12/2011</td>
<td></td>
<td></td>
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</table>

**Individual Evaluator Schemes**

<table>
<thead>
<tr>
<th>Scheme Name</th>
<th>Order</th>
<th>Rating Scheme</th>
<th>Evaluation Status</th>
<th>Status Date</th>
<th>Recommendation</th>
<th>Overall Rating</th>
</tr>
</thead>
<tbody>
<tr>
<td>FIRSTREV</td>
<td>1</td>
<td>FIRSTREVW</td>
<td>CMPLT</td>
<td>13/12/2011</td>
<td>PASS</td>
<td>1.00</td>
</tr>
</tbody>
</table>

**Evaluation Attachments**

- Attached File: Research_Thesis_Committee_Evaluation_Notes_12132011.doc
- Attached File: Research_Thesis_Committee_Evaluation_Not

**Evaluation Overview**

ID: 4341
Academic Institution: PSSGR
Evaluation Category: THESIS
Evaluation Code: THESESEXAM
Candidate Number: 00000000022
Thesis Submission Nbr: 1

**Evaluation Status Details**

*Evaluation Status: CMPLT
Status Date: 14/06/2012
Administrator: AD1012

**Final Recommendation/Comments**

Recommendation: PASS
Recommend Prize: DPRIZE
Dean's Prize

**Calculated Scheme**

Rating Scheme:
Overall Rating:
As of Additional Features July 2012, an Attachment link has been added to the evaluation pages to store supporting documentation such as evaluated or examined thesis or examiner’s reports. An example of an attachment stored against the evaluation page is shown below.

The number of attachment items then appears on the evaluation page against the Attachments link.

One of the real benefits for institutions is that Evaluation Management in future planned phases will be able to evaluate or calculate a rating or result for each item or component that needs to be evaluated for an applicant or research candidate. For example, this may require rating a research candidate’s qualifications, test scores, previous experience, or committee results. The automated calculation processing is targeted for future release. Evaluation Management also supports the manual entry of results or outcomes for those institutions that do not require a rules-driven approach. In future phases the calculated results would be held in the Calculated Scheme page displayed below.
As not all research candidate or applicant evaluations at the application and/or the theses stage of the process are undertaken by committees within institutions, the ability to hold individual evaluator or examiner ratings or evaluation outcomes is provided within this administrative component. The Individual Evaluator Scheme page provides institutions with the ability to track the status of particular evaluation schemes and ratings against individual evaluators. An example of an evaluation scheme may be thesis evaluation. The feature also provides institutions with the ability to prevent the addition or deletion of an evaluator or their ratings for the research candidate, after the evaluation status is finalized. The Recommendation field shown below can represent all of the recommendations from the underlying evaluators or examiners, such as invite to interview, oral defense, passed, or approved.

In future planned phases the recommendation status may be used to trigger workflow approvals. The Overall Rating display provides institutions with the ability to define whether the rating displays a running average, or whether the rating is only displayed when all of the rating components have been finalized. The Evaluator Details section of the page provides institutions with the ability to record the individual evaluator rating of each component item, the status of this result, and the recommendations of each evaluator. These ratings will finally roll up to an overall recommendation for the research candidate – the outcome of the thesis evaluation. An example of the Individual Evaluator Scheme page is shown below.
The final page within the component provides institutions with the ability to manage the evaluation by committee, panel, or jury. It allows for the data entry of committee evaluations and ratings, but still provides institutions with the ability to record the ratings of each evaluator or examiner that represents the committee. The features are very similar to the Individual Ratings page. However, the Committee Details section provides institutions with the ability to enforce the order in which committees should evaluate an application or thesis, if multiple committees are in place for an evaluation scheme. This provides institutions with the ability to support multiple and hierarchical committee structures and define the order in which they
should consider the evaluation. An example of the Committee Scheme page is shown below where the order of the committee evaluation is displayed (committee order 2 is shown in this example).

<table>
<thead>
<tr>
<th>Committee Scheme</th>
<th>Order</th>
<th>Rating Scheme</th>
<th>Evaluation Status</th>
<th>Status Date</th>
<th>Recommendation</th>
<th>Over Rating</th>
</tr>
</thead>
<tbody>
<tr>
<td>THESIS</td>
<td>2</td>
<td>THESIS_EXAM</td>
<td>CMPLT</td>
<td>14/06/2012</td>
<td>Attachments (0)</td>
<td>PASS 3.00</td>
</tr>
<tr>
<td>ORLDEFSN</td>
<td>3</td>
<td>THESIS_EXAM</td>
<td>CMPLT</td>
<td>14/06/2012</td>
<td>Attachments (0)</td>
<td>PASS 3.00</td>
</tr>
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</table>

<table>
<thead>
<tr>
<th>Committee Details</th>
</tr>
</thead>
<tbody>
<tr>
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<tr>
<td>Committee Code:</td>
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<td>Evaluation Status:</td>
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<tr>
<td>Recommendation:</td>
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<tr>
<td>Overall Rating:</td>
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</table>

<table>
<thead>
<tr>
<th>Evaluator Details</th>
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<tbody>
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<td>Evaluator ID:</td>
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<td>Evaluation Status:</td>
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<tr>
<td>Recommendation:</td>
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<tr>
<td>Overall Rating:</td>
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</tbody>
</table>

<table>
<thead>
<tr>
<th>Rating Components</th>
</tr>
</thead>
<tbody>
<tr>
<td>Rating Component</td>
</tr>
<tr>
<td>--------------------</td>
</tr>
<tr>
<td>PRESENTATION</td>
</tr>
<tr>
<td>RESEARCH</td>
</tr>
<tr>
<td>WRITING</td>
</tr>
</tbody>
</table>
Create and Maintain Evaluations

In order to provide institutions with the ability to more easily manage evaluations, we provide a batch process to enable the assignment, update, and deletion of evaluation items. This batch process utilizes Campus Solutions Population Selection and provides three functions. The first option creates a new evaluation for a selected group of applicants, research candidates, or any other evaluation population defined by the institution. The second option updates evaluations, allowing updates and changes within certain conditions to existing evaluations. The third option deletes evaluations for selected evaluation populations identified by the institution. An example of the batch process is shown below.

Conclusion

The functionality we refer to as EMS demonstrates Oracle's forward-thinking approach to providing enhanced capabilities and features to our customers and to providing additional value for our global education community. We expect that the new Evaluation Management administrative structures provided in this release, combined with the planned future releases of integrated workflow, notifications, evaluation center, and a rules-based engine will provide customers with greater flexibility and control in evaluating applicants, students, research candidates, and other evaluation populations during the Campus Solutions applicant or student lifecycle.
As we have seen, Evaluation Management will provide institutions with a generic evaluation feature. It will permit institutions to define what needs to be evaluated, who will evaluate it, and the ability to define a process flow for the evaluation itself. In planned future phases a self-service evaluation center will be provided that will facilitate the entry of results by an evaluator. We also plan to support evaluation administration and management by providing a 360-degree view of an individual evaluation as well as evaluations under a certain evaluation category.

While we do not expect institutions to be able to deploy the administrative components and batch process delivered to date, we would recommend that institutions start to analyze and evaluate how these features may be leveraged by their institutions in future phases.

The following recommended documentation for Evaluation Management can be found on the ‘My Oracle Support’ portal.

- Enterprise Campus Solutions 9.0 Additional Features January 2012 Pre-Release Notes (ID 1389697.1)
- Enterprise Campus Solutions 9.0 Additional Features July 2012 Pre-Release Notes (ID 1470613.1)
- Research Tracking Evaluation Management.pdf (ID 1400727.1)
- Research Tracking and Thesis Management.pdf (ID 1400727.1)

The ID for the PeopleSoft Enterprise Campus Solutions 9.0 Documentation Home Page is 751540.1.

We encourage all institutions to take a look at the above documentation, in order to familiarize themselves with the features delivered to date, and stay tuned for further announcements from Oracle on the subsequent phases for the Evaluation Management System.