



UNIVERSITY OF TORONTO  
FACULTY OF MEDICINE

# GEMS<sub>2.0</sub>

(Graduate Education Management System)

Graduate Unit Administrators Guide

<http://gems.med.utoronto.ca>

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## 1. Introduction

### i. The Graduate Unit Coordinator (GUC) role

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The GUC will perform the following functions in GEMS:

- Manage Agreement Text
- Manage Email Templates and Send Emails
- Edit, Review and Approve Agreements
- Upload TA Income
- Undo Agreements Approvals
- Cancel Agreements

### ii. Rollover to New Academic Year

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When a new academic year’s Fall/Winter registration data is added to ROSI/ACORN, the data is uploaded to GEMS automatically and it appears in GEMS within two days. The “Academic Year” drop-down lists will then default to the new academic year. Prior to inviting new and continuing students to complete the new academic year’s Agreements, GUCs must prepare by completing the following:

1. Ensuring that the current academic year’s Agreements are completed.
2. Updating the Agreement Text with new academic year’s details (see section 2 (i): *Create Agreement Text for Current Year*).
3. Updating the Email Templates on GEMS with new academic year’s information (see section 2 (ii): *Edit Email Templates*).

### iii. Agreement Retention Schedule

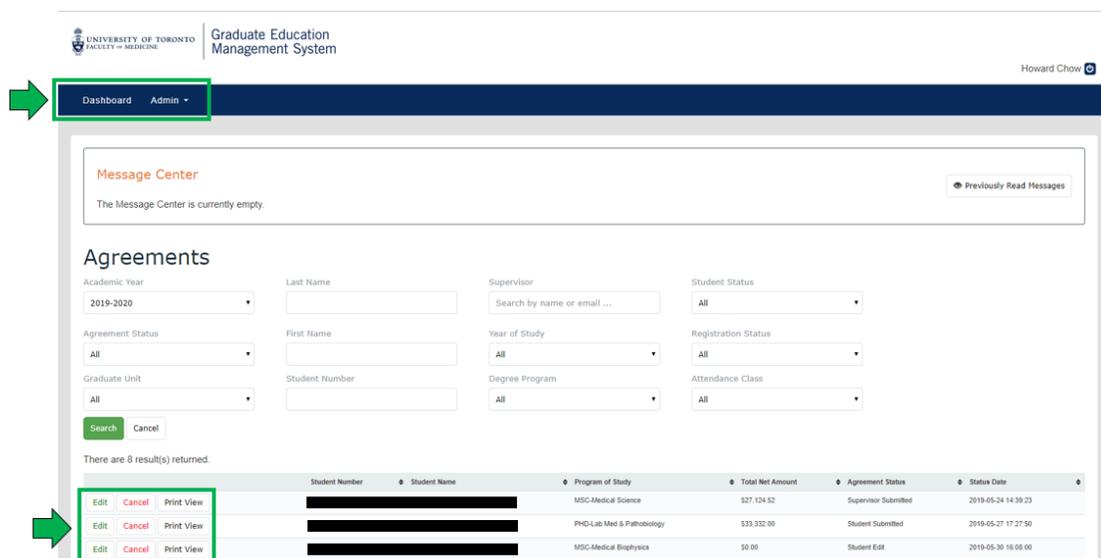
The GEMS Agreements will follow the University of Toronto Archives and Records Management Services' file retention schedule for financial statement reports, which states: Current year plus 7 years. After an Agreement has reached the retention requirements, it will be destroyed.

### iv. The GEMS Interface

The GEMS user interface has two main views, the Dashboard view and the Admin >> Search view.

#### Dashboard View - Find Existing Agreements

The Dashboard is the default view seen when logging into GEMS and is used to manage agreements.

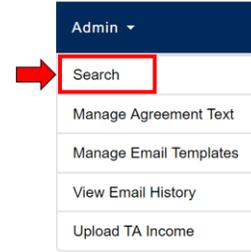


Note that the Dashboard also has buttons to Edit, Cancel or access the Print View of Funding Agreements.

- Editing and cancellation of Funding Agreements is fully explained in Section 3 of this guide.
- Print View provides a printer ready version of the Funding Agreement.
  - To print an Agreement, go to **Dashboard** and click on the “Print View” button beside the Student Number and then “Print to PDF”.
  - The print option is also available to students and supervisors.

## Admin >> Search View - Find Students or Supervisors

The Admin-Search view (click Admin and select “Search” in the drop down) is used to find students and/or supervisors. It also provides access to the Financial Profile view of an agreement (a very detailed breakdown of Funding) and is used to send customized emails through GEMS.



Admin Search tool:

- ① Click on the “eye” icon to display Student Detail
- ② Click on the “sandwich” icon to display Detailed Financial Profile

## 2. Setup and Communication

Each year when it is time to create Funding Agreements, GUCs will need to prepare by completing the following:

- i. Updating Agreement Text for Current Year
- ii. Updating Email Templates
- iii. Sending Emails to Students and Supervisors

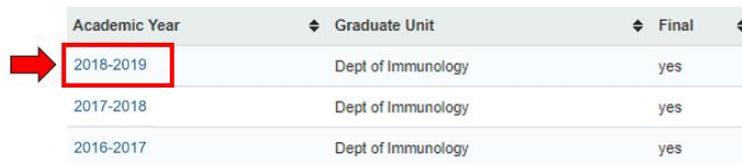
### i. Create Agreement Text for Current Year

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**Agreement Text** is the short name for the **General Conditions of the Agreement**, which are outlined for the student on the Sign Off tab of the Agreement. It should be checked for updates every year BEFORE students are invited to fill out Agreements.

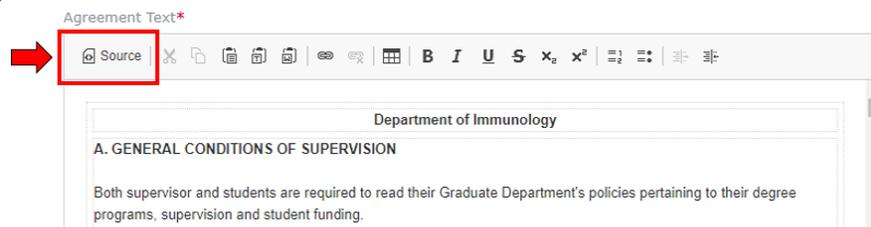
At the beginning of each new Academic Year, new Agreement Text must be created. The text and the formatting from a previous year's Agreement can be copied to the new Agreement. To copy agreement text:

1. Click on the Admin drop down and select "Manage Agreement Text"
2. Click on the latest (previous year's) Academic Year

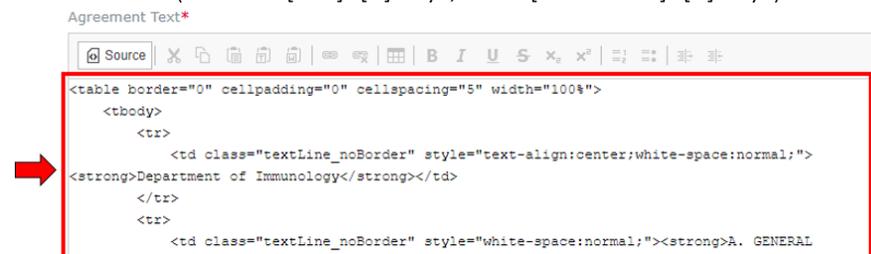


Academic Year	Graduate Unit	Final
2018-2019	Dept of Immunology	yes
2017-2018	Dept of Immunology	yes
2016-2017	Dept of Immunology	yes

3. Under the Agreement Text, click on the Source button (to the far left) to reveal the HTML coding



4. Select all the HTML code (on a PC: [Ctrl]+[A] keys; Mac: [Command]+[A] keys)
5. Copy the HTML code (on a PC: [Ctrl]+[C] keys; Mac: [Command]+[C] keys)



- Click **[Cancel]** to close the Agreement Text (**do NOT save it**)
- To create a new agreement: Click **[+ Add Agreement Text]** button to create a new Agreement

/ Agreement Text



- There are three required fields:  
Graduate Unit, Academic Year (toggle the drop down to select a year) and Agreement Text

- In the Agreement Text field, click the **[Source]** button (to the far left) to reveal the HTML coding (it will be blank for new Agreements)

- Paste the HTML code (copied earlier in step 4), on a PC: **[Ctrl]+[V]** keys; Mac: **[Command]+[V]** keys
- Click the **[Source]** button to toggle back to the normal view (text formatting will now display)
- To save as a draft (ensure that Published in the lower left is **NOT CHECKED**, then click the **[Save]** button



13. Edit as needed, then when ready to publish, check the Published box, then click [Save]

*NOTE: Once the Published box is checked, the text will be published in the agreements for this academic year. If the text is later edited, the edited version will overwrite the previous version in all agreements for this academic year, regardless of agreement status.*

## ii. Email Templates

To view the Email Templates, click on the Admin drop down and select “**Manage Email Templates**”. There are two types of Email Templates: Default and Custom.

- i. The Default email notification templates are automatically sent to students and/or supervisors when Agreements are submitted, approved, cancelled or unlocked. They can be edited but not deleted. They cannot be manually sent and should not be renamed.

Name	Graduate Unit	Type
Notify Supervisor Of Student Submission	Dept of Immunology	Notify Supervisor Of Student Submission
Notify Supervisor Of Unlocked Agreement	Dept of Immunology	Notify Supervisor Of Unlocked Agreement
Notify Student Of Unlocked Agreement	Dept of Immunology	Notify Student Of Unlocked Agreement
Notify Student & Supervisor Of Cancelled Agreement	Dept of Immunology	Notify Student & Supervisor Of Cancelled Agreement
Notify Student & Supervisor Of Approved Agreement	Dept of Immunology	Notify Student & Supervisor Of Approved Agreement
<b>Delete</b> Invitation: Invite Student(s) to log onto GEMS	Dept of Immunology	Regular
<b>Delete</b> Supervisor Reminder	Dept of Immunology	Regular

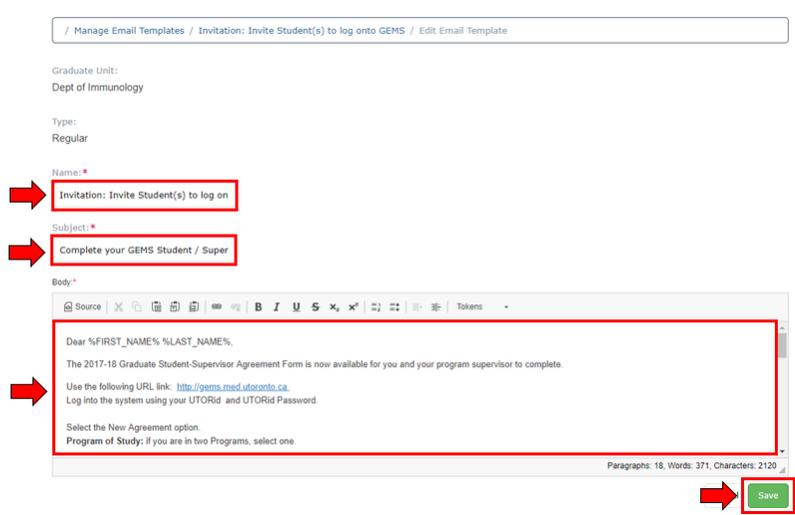
- ii. The Custom email notification templates can be identified by the [Delete] button to the left of their name. These templates can be edited or deleted. Sending these emails to students or supervisors is triggered manually (see Section iii. Send emails...).

### Edit an Existing email template:

1. To edit an existing email template, click on the link under the “Name” column heading.
2. To the upper right click [Edit Email Template]



3. There are three required fields: Name, Subject and Body.
4. Click [Save] after completing editing.

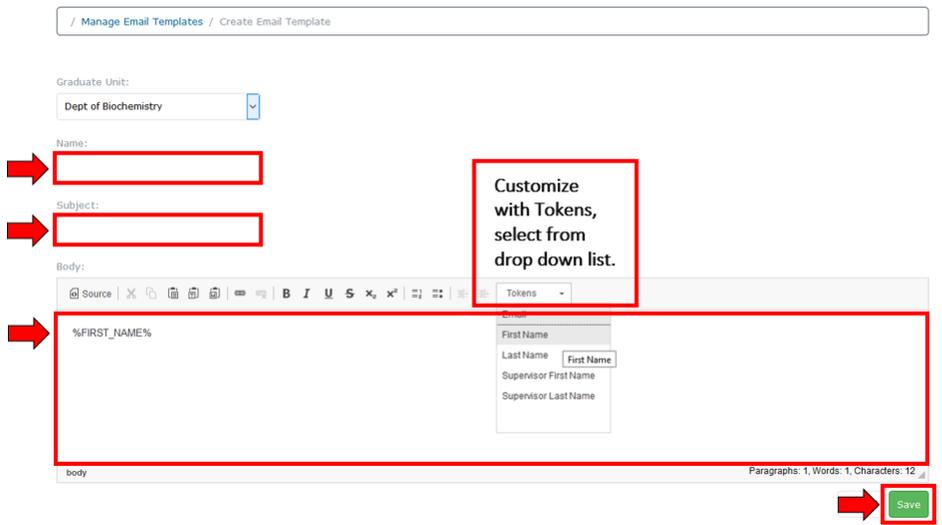


**Create a new custom email template:**

1. From the Admin drop down, select Manage Email Templates
2. Click [Create Email Template] in the upper right (a new blank email template will open)



3. Enter a Template name in the “Name” field
4. Enter a Subject (this is the subject line in emails)
5. Enter content in the Body field and format the text (bold, italic, underline). Web links, images and tables are supported
6. Email messages can be customized by using “Tokens” to insert Email, First Name, Last Name, Supervisor First Name, and/or Supervisor Last Name into the message body. Click Tokens and select from the drop down list (eg. Selecting First Name from the token list will insert the token text “%FIRST\_NAME%” into the body, which will insert the student’s first name into the sent notification)



7. Click [Save]

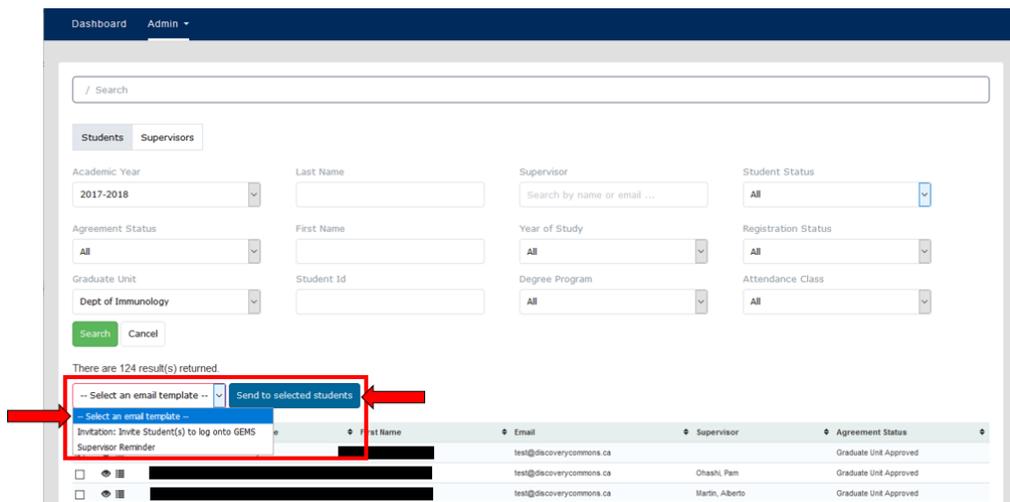
### iii. Sending Emails to Students and Supervisors

After editing the Agreement Text and Email Templates, GUCs can send an invitation to students and supervisors to complete the Agreement Forms. This is done through the GEMS email function.

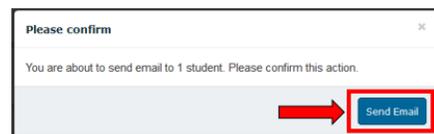
#### Sending Emails

The process is the same to send customized emails to either Students or Supervisors:

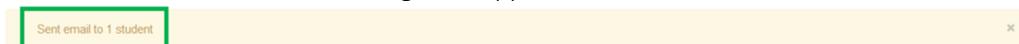
1. In the Admin drop down, select Search
2. Select either Students or Supervisors tab
3. From the Students tab, run a search using the drop down filters and/or enter Last Name, First Name or Student Number, or Supervisor into the field(s)  
OR  
From the Supervisors tab, run a search using the drop down filters and/or enter Last Name, First Name into the field(s)
4. Click [Search]
5. In the results list, check the box to the left of the Last Name(s) to whom you wish to send an email (one or more names can be selected)
6. When one or more names are checked, a drop down box will appear above the list of names



7. Select a custom template from the drop down list
8. Click [Send] to selected students or supervisors
9. Confirm by clicking [Send Email]



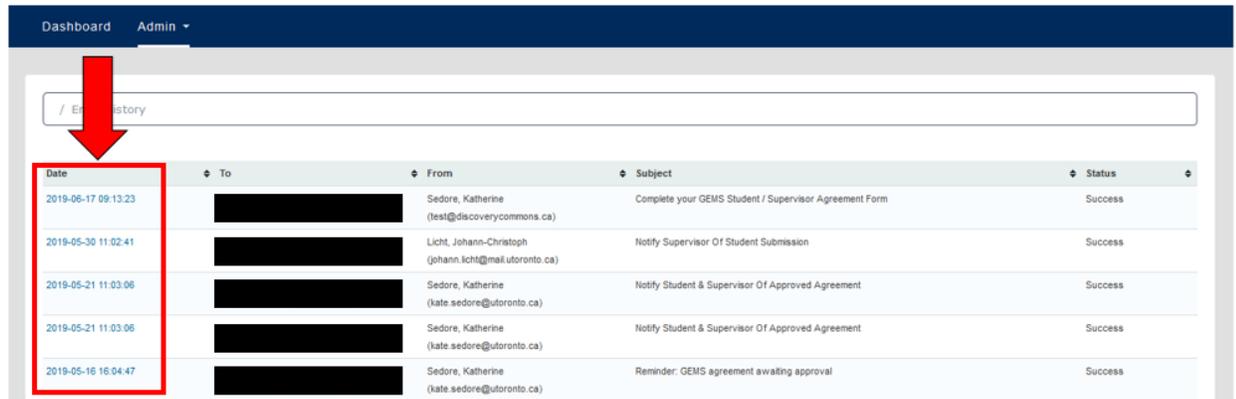
10. An email sent confirmation message will appear on the screen



## View Email History

All messages sent to students or supervisors through GEMS can be viewed through Admin >> View Email History. The email history is kept for three months.

1. Click the Admin drop down
2. Select and click “View Email History”
3. Messages can be sorted by column type (Date, To, From, Subject, Status)
4. Select an email by clicking on the links under Date on the far left column



Date	To	From	Subject	Status
2019-06-17 09:13:23	[REDACTED]	Sedore, Katherine (test@discoverycommons.ca)	Complete your GEMS Student / Supervisor Agreement Form	Success
2019-05-30 11:02:41	[REDACTED]	Licht, Johann-Christoph (johann.licht@mail.utoronto.ca)	Notify Supervisor Of Student Submission	Success
2019-05-21 11:03:06	[REDACTED]	Sedore, Katherine (kate.sedore@utoronto.ca)	Notify Student & Supervisor Of Approved Agreement	Success
2019-05-21 11:03:06	[REDACTED]	Sedore, Katherine (kate.sedore@utoronto.ca)	Notify Student & Supervisor Of Approved Agreement	Success
2019-05-16 16:04:47	[REDACTED]	Sedore, Katherine (kate.sedore@utoronto.ca)	Reminder: GEMS agreement awaiting approval	Success

## 3. Managing Agreements

Managing Agreements consists of the following five activities:

- i. Reviewing/editing new Agreements submitted by Students and Supervisors
- ii. Uploading TA Income
- iii. Finalizing Graduate Unit Approval
- iv. Unlocking and re-editing approved Agreements (only is required)
- v. Cancelling Agreements

By this time, GUCs will have contacted students to complete and submit their GEMS Funding Agreements. The moment a student logs in to GEMS and confirms their Program of Study, an agreement is created. At this point it will have the status of Student Edit.

Once submitted by the student, the Agreement Status will display “Student Submitted”. The Student’s Supervisor will then automatically receive an email informing them that an agreement is ready and pending their review.

After a supervisor reviews and approves the Agreement, the Agreement Status will display “Supervisor Submitted”. GUCs will thus be able to track the progress of the agreement completion. They may review and edit Agreements at any time as explained below.

**NOTE:** If the student has not yet opened an Agreement for the selected Academic Year, no indication of an Agreement will appear on the Dashboard.

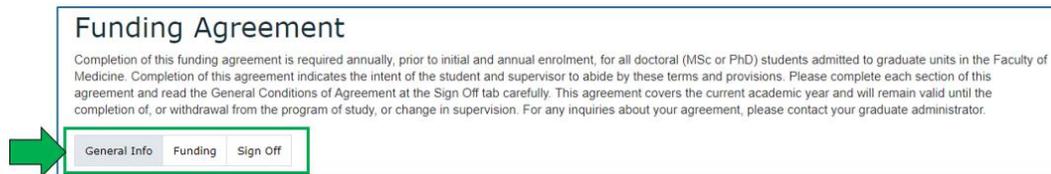
1. On the Dashboard view, a list of students and the status of their Agreements is displayed. If the list is very long, it can be filtered.

**NOTE:** In the **Total Net Amount** column, an amount with a red exclamation (!) indicates an Agreement where the Total Guaranteed Funding is less than the Total Funding (see next section).



	Student Number	Student Name	Program of Study	Total Net Amount	Agreement Status	Status Date
 Edit Cancel Print View			MSC-Medical Biophysics	\$0.00	Supervisor Submitted	2019-06-06 12:17:54
Edit Cancel Print View			PHD-Speech & Lang Pathology	\$4,272,291	Supervisor Submitted	2019-11-09 11:07:10
Edit Cancel Print View			MSC-Medical Science	\$4,094.63	Supervisor Submitted	2019-05-24 14:37:33

2. Click Edit (to the far left of the row) to open an Agreement.
3. The Agreement is comprised of three tabs: (i) General Info, (ii) Funding and (iii) Sign Off.



**Funding Agreement**

Completion of this funding agreement is required annually, prior to initial and annual enrolment, for all doctoral (MSc or PhD) students admitted to graduate units in the Faculty of Medicine. Completion of this agreement indicates the intent of the student and supervisor to abide by these terms and provisions. Please complete each section of this agreement and read the General Conditions of Agreement at the Sign Off tab carefully. This agreement covers the current academic year and will remain valid until the completion of, or withdrawal from the program of study, or change in supervision. For any inquiries about your agreement, please contact your graduate administrator.

General Info Funding Sign Off

## i. The General Info tab

The General Info tab contains several fields whose values are filled in from ROSI and several fields where the students must select the values themselves.

**NOTE:** ROSI/ACORN supplied field values cannot be edited in GEMS. Any changes must be made in ROSI/ACORN. Field values in GEMS that come from ROSI are updated once a day, every day.

Starting in 2019-20, the 'Funding Indicator' that is from ROSI is added in the General Info tab which is only viewable by the Graduate Unit Coordinator and GLSE Administrator roles, as a reference.

ROSI/ACORN supplied field values:	Student editable fields:
<p><b>Funding Agreement</b></p> <p>Completion of this funding agreement is required annually, prior to initial and annual indicates the intent of the student and supervisor to abide by these terms and provide agreement covers the current academic year and will remain valid until the complete graduate administrator.</p> <p>General Info   Funding   Sign Off</p> <p>Academic Year: 2019-2020</p> <p>Agreement Status: New</p> <p>Student Name: [REDACTED]</p> <p>Student Number: [REDACTED]</p> <p>Year of Study: Y3</p> <p>Registration Fee Category: N/A</p>	<p>Program of Study: * Required for submission -- Select --</p> <p>Graduate Unit: [REDACTED]</p> <p>Supervisor: * Required for submission Begin typing and select from list...</p> <p>If you are changing the name of a previously selected supervisor, you must select the name from the drop down list and click Save and Continue button. <input type="checkbox"/> For first year students indicate here if you are in a Rotation Program (Supervisor name not required)</p> <p>Co-Supervisor: <input type="checkbox"/> Indicate here if you have a Co-Supervisor who provides full or partial funding Begin typing and select from list...</p> <p>If you are changing the name of a previously selected co-supervisor, you must select the name from the drop down list and click Save and Continue button.</p> <p>Primary Research Location: (Where you will be working the majority of time) * Required for submission -- Select --</p> <p>Are you a medical resident trainee enrolled in a clinician-scientist/investigator program? * Required for submission <input type="radio"/> Yes <input checked="" type="radio"/> No</p> <p>Funding Indicators: <input type="radio"/> Yes <input checked="" type="radio"/> No</p> <p>Are you receiving funding? * Required for submission <input type="radio"/> Yes <input checked="" type="radio"/> No</p> <p>Start Term: (In which term are you starting your program?) * Required for submission <input type="radio"/> Fall <input type="radio"/> Winter <input checked="" type="radio"/> Summer</p> <p>Save and Continue</p>

The student's response to the last two questions will affect the Total Guaranteed Funding amount displayed on the Funding tab.

## ii. The Funding tab

The Funding tab contains three tables:

- Total Guaranteed Funding table
- Funding table
- TA Positions (taxable income) table

### Total Guaranteed Funding table:

- Total Fees** (ROSI/ACORN generated; not-editable in GEMS)  
Total fees is an amount supplied by ROSI. It consists of all tuition fees, essential fees and non-essential fees payable by the student in the academic year.
- Non-Essential Fees** (ROSI/ACORN generated; not-editable in GEMS)  
This is the amount of non-essential fees the student opted in to when they registered.
- Living Allowance** (Populated by pre-set values in GEMS. Governed by the particular program of study and the selected start term. Not editable)
- Living Allowance Adjustment** (editable by GUC)
- Guaranteed Base Funding** (sum of a + b + c + d; not editable)  
Note that Guaranteed Base Funding will automatically default to 0.00 under several conditions:
  - If the student is in a program where students are not guaranteed funding.

- b. If the student indicated on the General Info tab that they were not receiving funding.
- c. If the student has a registration fee category of Exempt (e.g., summer session)
- f. **Top-up** (editable by GUC, students and supervisors)
- g. **Total Guaranteed Funding** (sum of e + f; not editable)

### Funding table:

There are two ways in which fund amounts can be entered into the Funding table for a student:

- i. They are automatically uploaded from ROSI. These tend to be University of Toronto administered funds. These funds must be processed through ROSI to appear here.
- ii. They are added to the table manually by the student, supervisor or the GUC. These funds are generally not administered by the University; they may be amounts from the supervisor’s research grant. These are called External Funds.

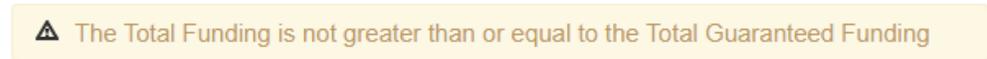
**Add External Fund** If you are not receiving funding you do not need to enter anything here. Continue to the Sign Off tab

Fund Name	Fund Type	Start Date	End Date	Amount	Cancelled	Total Amount
University of Toronto Fellowship - Medical Biophysics	Fellowship	2019-01-01	2019-04-30	\$624.00	\$0.00	\$624.00
* Supervisor's Research Grant - SickKids	Research Assist	2018-09-01	2019-08-31	\$18,930.10	\$0.00	\$18,930.10
Brain Canada Training Award	Scholarship	2018-09-01	2019-01-31	\$14,673.10	\$0.00	\$14,673.10
<b>Total:</b>				\$34,227.20	\$0.00	\$34,227.20

To add an External Fund amount to GEMS, click the green ‘Add External Fund’ button above the funding table and fill out the required fields. These external fund entries may be edited in GEMS.

### Underfunded Alert:

*When the total amount in the Funding table is not greater than or equal to the Total Guaranteed Funding amount, a red exclamation mark (!) appears in the Total Net Amount column on the Dashboard list and a message appears at the bottom of the Funding tab.*



If a student is underfunded, GUCs should

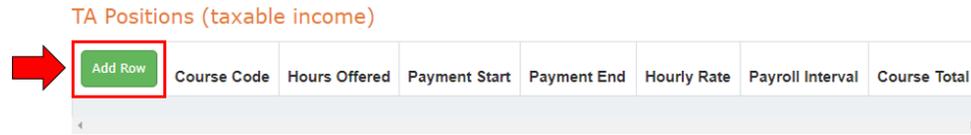
- Check that all University-administered funds are uploaded into ROSI and have had time to populate GEMS (minimum 24 hours, possibly up to 48 hours).
- Contact the Student’s Supervisor to discuss the funding issue and add to the supervisor’s research fund contribution, if appropriate.

### TA Positions (taxable income)

Income from Teaching Assistant positions needs to be reported on student Agreements. These entries are not supplied by ROSI/ACORN and must be entered into GEMS by the GUC.

There are two ways this can be added to an agreement.

1. Individually, by clicking on the [Add Row] button on the TA table on the Funding tab.



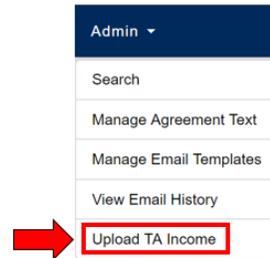
2. In bulk, by using the [Upload TA Income] function to upload data from an Excel spreadsheet.

Multiple entries can be imported into GEMS using the “Upload TA Income” function. This upload will add new rows of data to many Agreements at once.

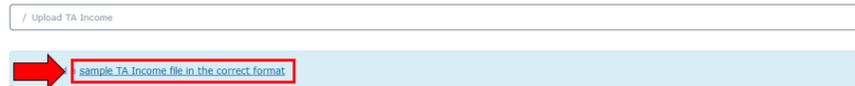
**Note:** This function does not check if the entry already exists so duplicate rows are created if data is uploaded twice. If a duplicate record already exists, the row will need to be deleted manually from the individual agreement.

Steps to bulk upload TA Income:

1. From the Admin drop down, select Upload TA Income

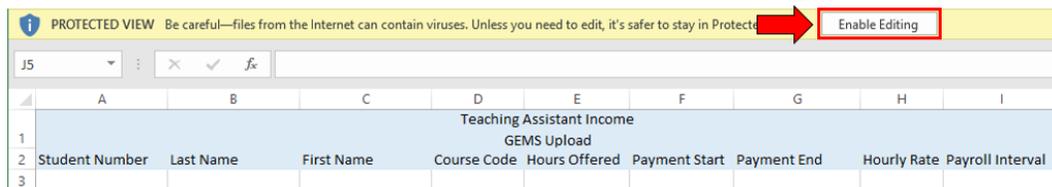


2. Click on the link “sample TA Income file in the correct format”

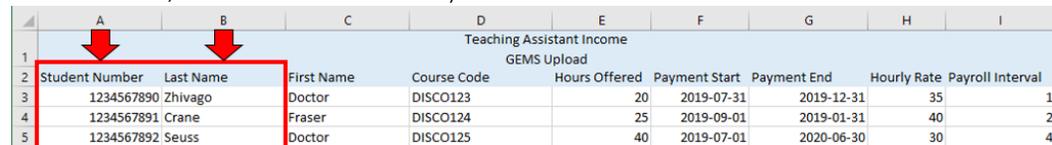


3. Select “Open with Microsoft Excel (default) file”, then click OK

4. The file will open and may be in PROTECTED VIEW, click Enable Editing



5. Complete all columns (Student Number and Last Name must match those in the student record in GEMS, which come from ROSI)



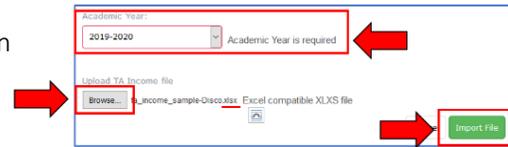
6. Save the file as XLXS extension (NOTE: only Excel compatible XLXS files are acceptable)

7. Return to the GEMS Upload TA Income page

8. Select the Academic Year field by selecting from the drop down

9. Click [Browse], select your Excel file and click Open

10. Click [Import File]



11. The results of the import will display at the bottom of the screen and indicate successfully “Imported Rows” and “Errors”.

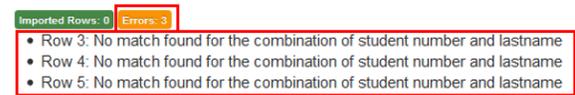
#### Import Results

12. Check that “Errors: 0” is displayed.



13. If there are Errors, a message will display with the row number from the Excel sheet and a brief description of the problem. You will also receive an email informing you about these errors.

#### Import Results



If there are errors, first edit the Excel spreadsheet to remove all the rows that were successfully uploaded. Correct the errors in the remaining rows, save the file and repeat the upload steps 7-12. Failing to remove the rows that were previously successfully uploaded will result in those rows being uploaded twice!

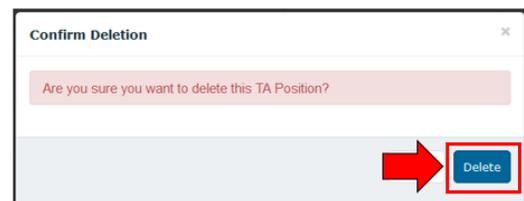
14. To delete a duplicate record:

- i. On the Dashboard, find the student’s Agreement and click the [Edit] button
- ii. Select the Funding tab, scroll down to TA Income and click the [Delete] button in the far left column of the row.

TA Positions (taxable income)

Add Row	Course Code	Hours Offered	Payment Start	Payment End	Hourly Rate	Payroll Interval	Course Total
<input type="radio"/>	DISCO123	25.00	2019-08-01	2019-08-31	\$50.00	1	\$1,250.00
<input type="radio"/>	DISCO123	25.00	2019-08-01	2019-08-31	\$50.00	1	\$1,250.00

iii. Confirm Deletion by clicking [Delete] again.



### iii. Sign Off tab

After reviewing a Supervisor Submitted Agreement and confirming that the student’s Total Funding is greater than or equal to their Total Guaranteed Funding, the next step is GUC approval.

1. On the Dashboard, locate the Student Agreement. On far left of the row, click [Edit]
2. Select the [Sign Off] tab

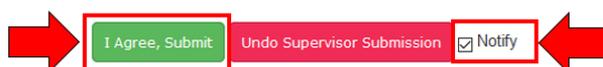
## Funding Agreement

Completion of this funding agreement is required annually, prior to initial and annual enrolment, for all doctoral (MSc or PhD) students admitted to graduate units in the Faculty of Medicine. Completion of this agreement indicates the intent of the student and supervisor to abide by these terms and provisions. Please complete each section of this agreement and read the General Conditions of Agreement at the Sign Off tab carefully. This agreement covers the current academic year and will remain valid until the completion of, or withdrawal from the program of study, or change in supervision. For any inquiries about your agreement, please contact your graduate administrator.



3. Scroll to the bottom of the page, then, if desired, ensure that the “Notify” checkbox is marked . When the Agreement is approved, this will send a default email (template = Notify Student and Supervisor of Approved Agreement) to the student and to supervisor, respectively.

By Clicking **I Agree, Submit**, you are indicating you have reviewed/completed all sections of this agreement and will abide by the **General Conditions of Agreement** as outlined above.



Status	Name	Date
Student Submitted	[REDACTED]	02-Oct-2018
Supervisor Submitted	[REDACTED]	06-Jun-2019



4. Click [I Agree, Submit]. The status of Grad Unit Approved and the date will appear.

NOTE: Once Grad Unit Approved, the Agreement will no longer be editable. See next section for editing approved agreements.

## iv. Editing Approved Agreements

If an Agreement needs to be edited after it has been approved, a GUC can ‘Undo’ the approval status to allow for editing.

**NOTE:** Changes to the Registration Fee Category or the University-administered funds in ROSI will automatically be picked up in GEMS, within 48 hours of their change.

1. On the Dashboard page locate the Student Agreement, to the far left of the row, click [View]

View	Cancel	Print View	Student Number	Student Name	Program of Study	Total Net Amount	Agreement Status	Status Date
View	Cancel	Print View	[REDACTED]	[REDACTED]	MSC-Medical Science	\$27,124.52	Graduate Unit Approved	2018-08-08 12:58:42
View	Cancel	Print View	[REDACTED]	[REDACTED]	PHD-Medical Science	\$29,195.52	Graduate Unit Approved	2018-08-15 13:05:48
View	Cancel	Print View	[REDACTED]	[REDACTED]	PHD-Medical Science	\$29,195.52	Graduate Unit Approved	2018-08-16 17:05:46

2. Click on the [Sign Off] tab, then scroll to the bottom of the page
3. Click [Undo Grad Unit Approval]

By Clicking **I Agree, Submit**, you are indicating you have reviewed/completed all sections of this agreement and will abide by the **General Conditions of Agreement** as outlined above.



Clicking “Undo Grad Unit Approval” once will undo the GUC approval and return the Agreement to the “Supervisor Submitted” status. The GUC will now be able to perform edits.

Subsequent clicking on the Undo approval button will undo the “Supervisor Submitted” status and then the “Student Submitted” status. This will allow supervisors and students to make the revisions themselves.

NOTE: The system will send default emails to Students and Supervisors when their submission status is changed. Notification message content can be edited, see the section titled Manage Email Templates, in this document.

## Change the Rotation Program Indicator

When the Rotation Status field on the General tab of an Agreement needs to be changed after an Agreement has been submitted and/or approved, the Grad Unit must ‘Undo’ the submission/approval statuses first (see above) before changes can be made.

The GUC may just undo their own approval. This will give them permission to uncheck the Program Indicator box and to select a supervisor for the student. Alternately, they may ‘Undo’ the submission all the way back to remove the ‘Student Submitted’ status and ask the students to make the edits themselves.

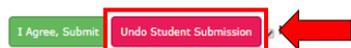
1. Locate the Student’s Agreement in Dashboard, to the far left of the row, Click [View]
2. Click on the [Sign Off] tab, then scroll to the bottom of the page
3. Click [Undo Grad Unit Approval]

By Clicking I Agree, Submit, you are indicating you have reviewed/completed all sections of this agreement and will abide by the General Conditions of Agreement as outlined above.



4. Click [Undo Student Submission]

By Clicking I Agree, Submit, you are indicating you have reviewed/completed all sections of this agreement and will abide by the General Conditions of Agreement as outlined above.



5. To change the Rotation Status for the student, click the [General Info] tab, and check/uncheck the box (For first year students indicate here if you are in a Rotation Program (Supervisor name not required)).

For first year students indicate here if you are in a Rotation Program (Supervisor name not required)

Then click [Save and Continue]; OR inform the student to change the rotation status, enter supervisor info, make any further edits, and re-submit their Agreement.

## v. Canceling Agreements

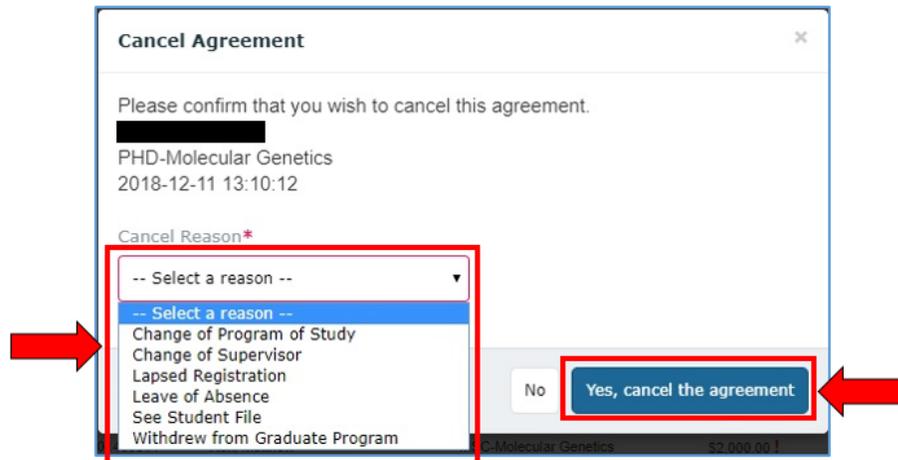
---

Agreements are tied directly to a Program of Study. If the Program of Study is changed, Agreements must be cancelled before an Agreement for another Program of Study can be created. The Program of Study cannot be edited on an existing Agreement. Only GUCs can cancel an Agreement.

To cancel an agreement:

1. Find the Agreement on the Dashboard
2. Click the [Cancel] button on the far left of the row.

3. Select the reason for cancelling the agreement from the drop-down list of pre-determined reasons.



4. Click [Yes, cancel the agreement]

The system will send default emails to Students and Supervisors notifying them that the Agreement has been cancelled.

## 4. Reports

The data in GEMS is available via SQL Server Reporting Services (SSRS). Each Graduate Unit can run reports on GEMS via SSRS. To make this possible, GLSE has paid the required licensing fee (CAL: Concurrent Access License) for those Graduate Units who requested access.

Prior to accessing SSRS, the designated Graduate Administrator will need to set-up VPN. The VPN gives access to the report server (SSRS), where the reports live, and thus is a necessary part of the procedure. This layer of security is designed to prevent unauthorized persons from accessing the data.

To install UTORvpn on your work computer, please follow the instructions given on this web site: [http://vpn.utoronto.ca/win\\_install](http://vpn.utoronto.ca/win_install)

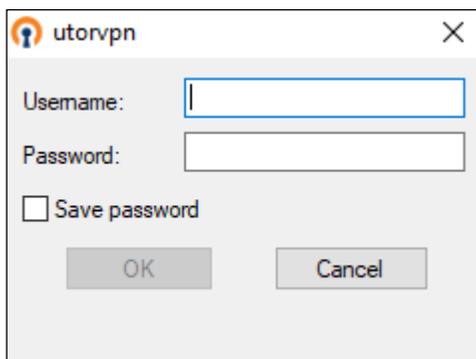
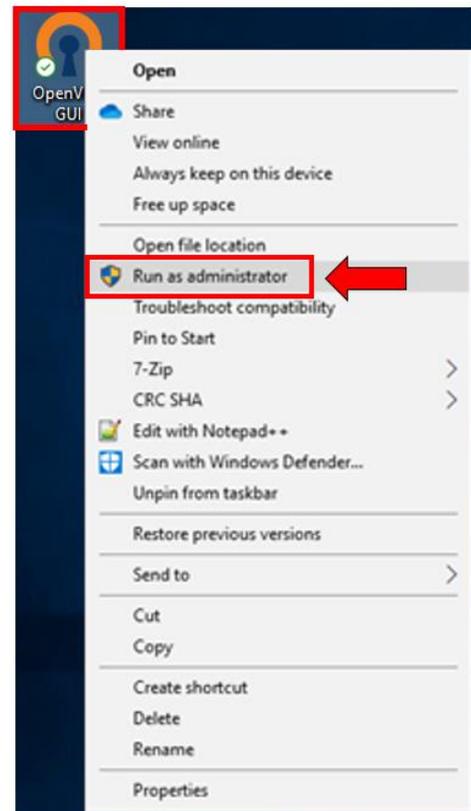
## SSRS Login Steps:

The steps below assume you have UTORvpn installed and that you have been granted a CAL license. If not, see above for explanation and instructions:

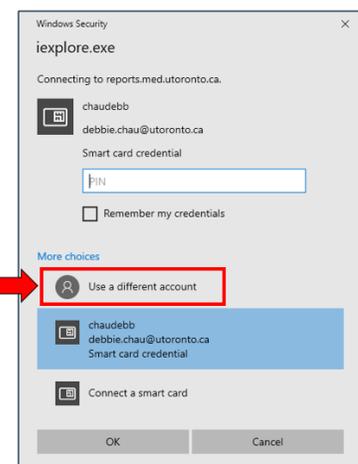
1. **Right click** on the OpenVPN GUI icon on your desktop. (If UTORvpn is not yet installed, see the instructions on the website above.)
2. Select “Run as Administrator”
3. Double click on the VPN monitor icon (located near bottom right taskbar)



4. Enter UTORid and password to access the VPN

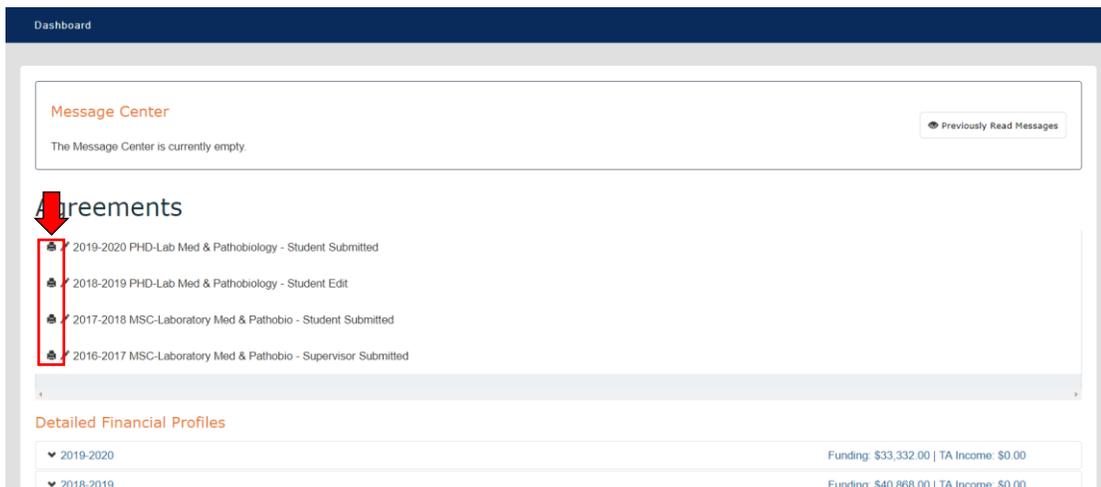
A dialog box titled 'utorvpn' with a close button (X) in the top right corner. It contains two input fields: 'Username:' and 'Password:'. Below the password field is a checkbox labeled 'Save password'. At the bottom are two buttons: 'OK' and 'Cancel'.

5. Once VPN Monitor icon turns green, open browser and on URL type “IP” and click “Enter”
6. The IP address that shows up must start with “142.150.248.####”
7. If not, disconnect and exit VPN and start again, until this IP address appears!!
8. Open a web browser and enter the SSRS URL:  
<http://reports.med.utoronto.ca/Reports/Pages/Folder.aspx>
9. The following window will pop-up. Choose “More Choices”
10. Select “Use Different Account”
11. Enter your Windows username and password to access SSRS (Your Windows account is that which you use to log in to your U of T desktop computer. It may be the same or different from your UTORid.)
12. If you cannot see 4 reports, click on Home and then GLSE.



## 5. Student Experience

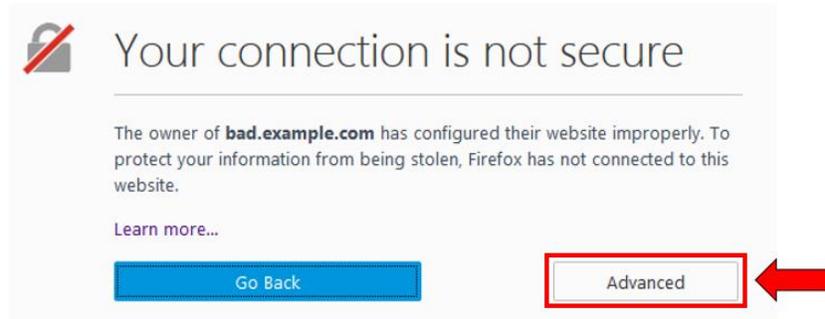
- Students will login with their UTORid.
- Students can see all their past agreements but they can only edit the current academic year or the previous year's agreements, but only if the agreement status is either New or Student Edit.
- If a student has an INVIT status in ROSI for two different Graduate Units they will be asked to choose one in GEMS.
- Once the agreement status is "Student Submitted" or higher, the student will no longer be able to edit the agreement. If necessary, the GUC can use the "Undo" function to return the agreement status back to Student Edit.
- All fields on the General Info tab must be completed in order for the Living Allowance and Guaranteed Funding numbers on the Funding tab to tabulate correctly.
- A student may print their Funding Agreement by clicking the Printer icon from the dashboard. This will give them a 'print view'. They may then use the 'Print to PDF' function in their browser.



## 6. Troubleshooting

What does "Your connection is not secure" mean?

When your web browser connects to a secure website (the URL begins with "https://"), it must verify that the certificate presented by the website is valid and that the encryption is strong enough to adequately protect your privacy. If the certificate cannot be validated, or if the encryption is not strong enough, your browser will stop the connection to the website and instead show an error page:



In order to bypass the warning page, click [Advanced]  
Select the option to add an exception. Enter the web address for GEMS and click on “Confirm Security Exception”.

### What if a Supervisor doesn't remember their password?

1. UTORid passwords cannot be retrieved by anyone and therefore, if forgotten, they have to be changed. If a user has an approximation of what their password might be, they can go to the UTORid password verification page at:  
<https://www.utorid.utoronto.ca/cgi-bin/utorid/verify.pl>
2. If they cannot recall their password at all, and have not registered for the [password reset tool](https://recover.utorid.utoronto.ca/default.aspx) <<https://recover.utorid.utoronto.ca/default.aspx>>, they may contact their “Department Business Officer (or delegate)” to request a password reset on their behalf. A list of Business Officers is available at the bottom of this webpage (<http://dc.med.utoronto.ca/forgotten-utorid-password>). Click the + in the lower right to expand the list.

Only a Business Officer (or delegate), can request a password reset for someone in their department. To do so they must verify the person's identity, and then email [discovery.common@utoronto.ca](mailto:discovery.common@utoronto.ca) with the contact information and the following information for the account:

- First Name
- Last Name
- UTORid
- Alternate contact address to which the password reset tool will be sent (this can either be an email they have access to, or an SMS number)

Once this information has been received, Discovery Commons will do the following:

- Set up / register the password reset tool for the account
- Initiate a password reset

This results in the user receiving a password reset message by email or SMS, allowing them to reset their password. Note: This will result as a Discovery Commons ticket charge.

## About Student Email Addresses

Email addresses for students are not managed in GEMS. They are pulled from the University's central LDAP server.

Neither GLSE or Discovery Commons staff can add or edit these email addresses.

LDAP (and therefore GEMS) does not pull email addresses from ROSI. The email address in ROSI is irrelevant for these purposes.

If you are a student and you also have/had staff status, you will have a student UTmail+ address (@mail.utoronto.ca) and a staff address (@utoronto.ca).

Your default address will be your staff address but you can change your UTmail email address. Please go to the UTORid Management page at <<https://www.utorid.utoronto.ca>> and review your options under Make Changes. Alternately you may send an email to [help.desk@utoronto.ca](mailto:help.desk@utoronto.ca).

Any changes to the UTORid Management page will take from 24-48 hours to take effect in LDAP and GEMS.

## 7. Appendix:

### i. GLSE Administrator Activities

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The GLSE Administrator (GLSE) can read and edit templates across all Grad Unit Departments (see all functionality below).

The GUCs (GUC) can access Search, Manage Agreement Text, Manage Email Templates, View Email History and Upload TA Income only to their *specific department* (\*only shaded items below).

FUNCTIONS (GLSE ADMINS)	READ	EDIT	ADD	DELETE
Search*	YES	N/A	N/A	N/A
Manage Admin Sites	YES	YES	YES	NO
Manage Agreement Text*	YES	YES	YES	NO
Manage Cancel Reasons	YES	YES	YES	NO
Manage Email Templates:				
• Default templates*	YES	YES	NO	NO
• Custom messages*	YES	YES	YES	YES
View Email History*	YES	N/A	N/A	N/A
Manage External Funds	YES	YES	YES	NO

Manage No Fund Reasons	YES	YES	YES	NO
Manage Living Allowance	YES	YES	YES	YES
Manage Notices	YES	YES	YES	YES
Manage Research Locations	YES	YES	YES	NO
Upload TA Income*	YES	YES	YES	YES
Manage Users	YES	N/A	YES	YES
Run Reports	YES	N/A	N/A	N/A

## Adding New Notices

1. From the Dashboard, Admin drop down, select Manage Notices
2. Click [Add New Notice]

/ Manage Notices

## Manage Notices

These notices will be displayed to the user directly on their Elentra ME dashboard as well as on a publicly accessible RSS feed. **Please note** we do not recommend posting confidential information inside these notices.



3. Set the "Notice Recipients:" field to "Everyone should receive this notice"

Note: Only the Audience Type 'Everyone should receive this notice' is functional in GEMS. The notice is NOT sent. It is available for reading in the Message Center after the user logs in.

4. Add content to the field "Notice Summary"
5. Set Time Release Options
6. Click [Save]

## Adding External Funds

1. From the Admin menu, select Manage External Funds
2. Click [Add External Funds]



Note: To add a Supervisor’s Research Grant to the list of external funds, include the prefix “\*Supervisor’s Research Grant - ” to the fund name. This will ensure that it appears with all the others when using a keyword search.

## Blocked Funds

University-administered awards (ROSI paid funds) can be blocked from appearing on Agreements. This is used for ROSI paid funds that are not included in the student’s base stipend and are considered private and personal information (e.g. accessibility awards).

GLSE must send a request the Discovery Commons (via ticket billing) to block the funds, using the AFS ID’s, from appearing on Agreements.

Note:

- New AFS IDs that need to be blocked should be requested at the end of an academic year to be effective the following year.
- Once an AFS ID is blocked, it will continue to be effective without annual requests.

The following funds have been blocked starting 2018-2019:

ROSI AFS ID Name	AFS ID
Accessibility Services Grant	106296
The Hospital for Sick Children Foundation Graduate Student Scholarships (Restrcomp)	12604
The Hospital for Sick Children Foundation Graduate Student Scholarships (Restrcomp)	103490
The Hospital for Sick Children Foundation Graduate Student Scholarships (CSTP)	106774
SGS Accessibility Grant for Students with Disabilities	103355
SGS Summer Gym Bursary	106285
ATKINSON SENIOR UNDERGRAD BURS	104232
HAMILTON R M P FAMILY BURSARY	104234
TD BANK HIGHER EDUCATION AWD	104245
UNIVERSITY OF TORONTO GRANT - UTAPS	104227
UNIVERSITY OF TORONTO GRANT BENNETT,A	104262
UTAA BURSARY FUND	104248
UTAPS GRANT	104085

## ii. Manage Users - UTORgrouper

### Adding Users to GEMS

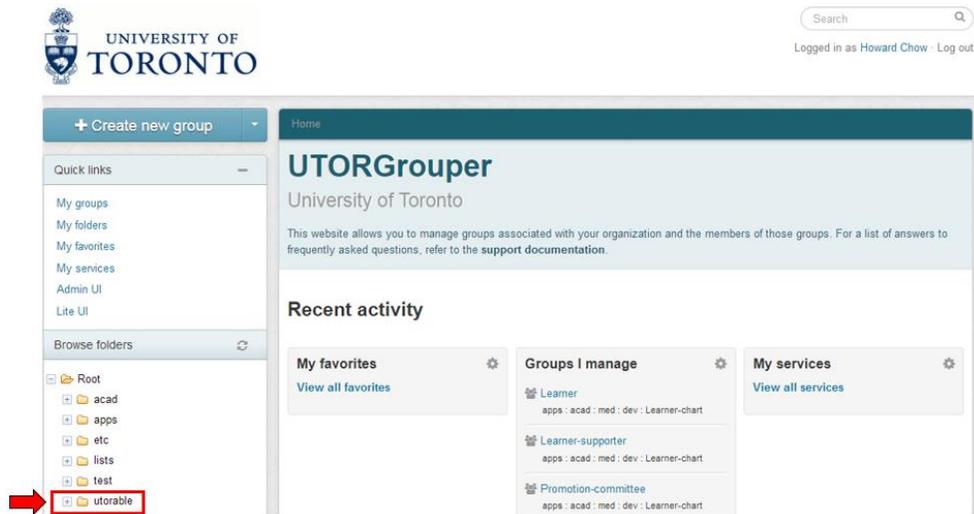
UTORgrouper controls user access to GEMS through the user's UTORid. The GEMS users managed by UTORgrouper include the GUCs and the Supervisors (faculty members).

Student access is also processed in UTORgrouper but it is through an automatic feed from ROSI/ACORN. Student access is controlled by their status in ROSI/ACORN.

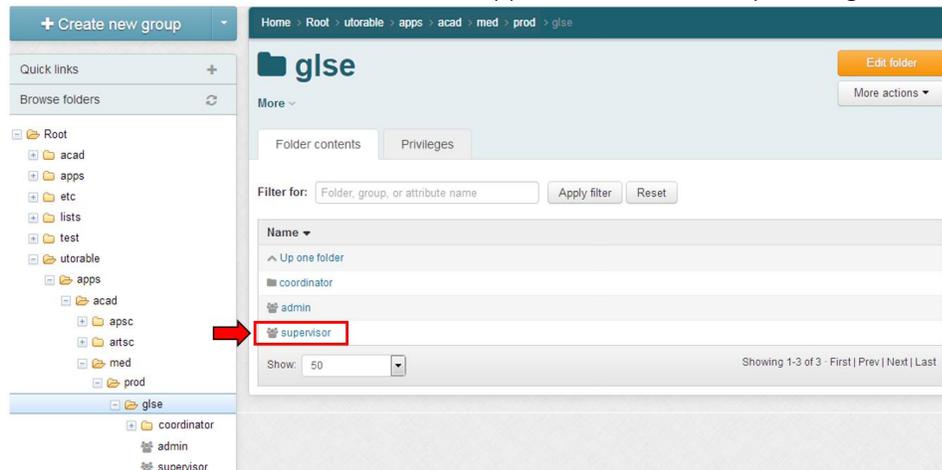
<https://utorgrouper.utoronto.ca>

To manage GUC or Supervisor access to GEMS, login to UTORgrouper with your own UTORid and password.

Under Browse folders -> Root -> click: utable

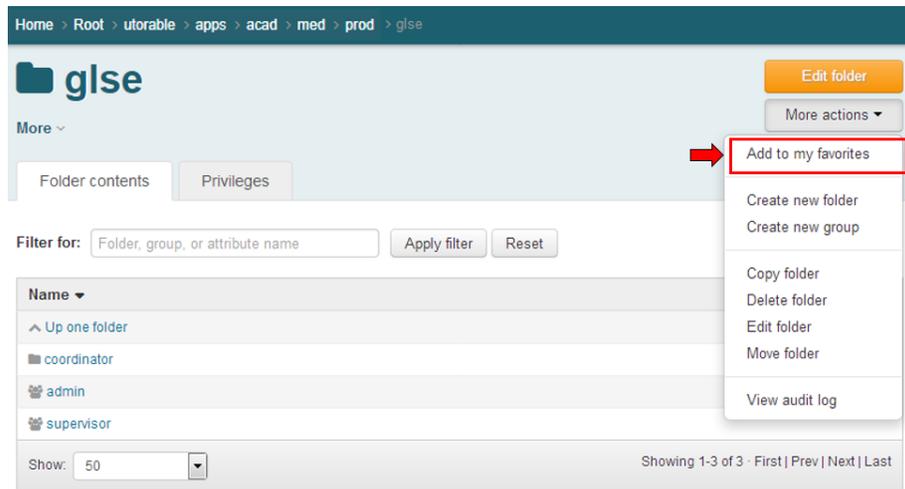


Navigate to the GLSE folder: Root -> utable -> apps -> acad -> med -> prod -> glse -> supervisor



**TIP: Add to my favorites to save these extra steps.**

Click [Add to my favorites]



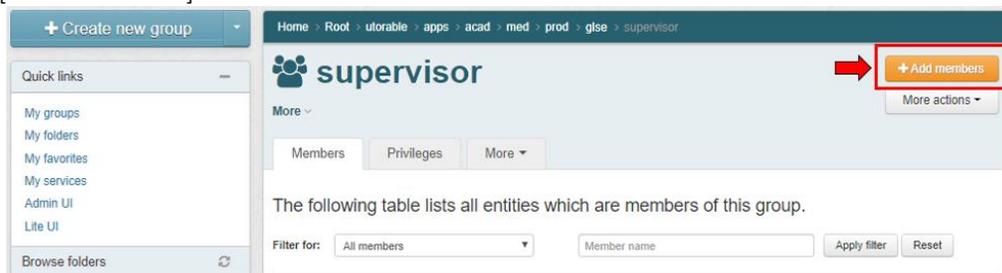
A shortcut is now created. Click on “My favorites” from the homepage.



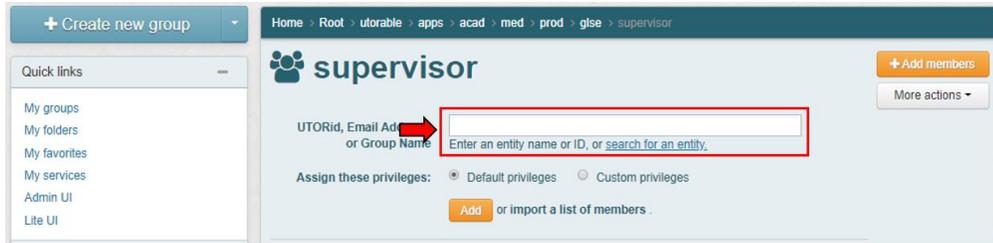
### Adding Faculty (supervisors) to a Group

Navigate to the GLSE folder: Root -> utorable -> apps -> acad -> med -> prod -> glse -> supervisor

Click [+Add members]

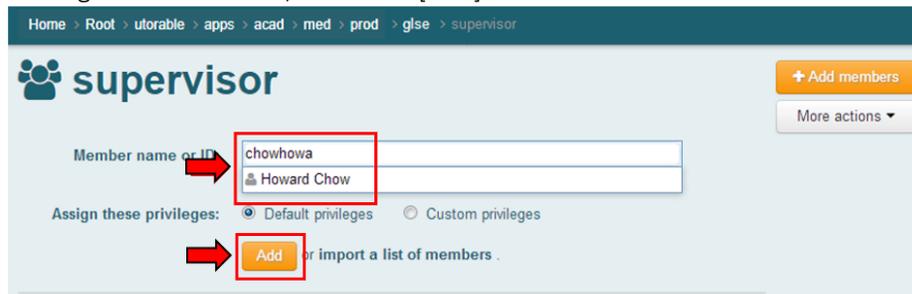


Enter UTORid in the “Member name or ID field:”



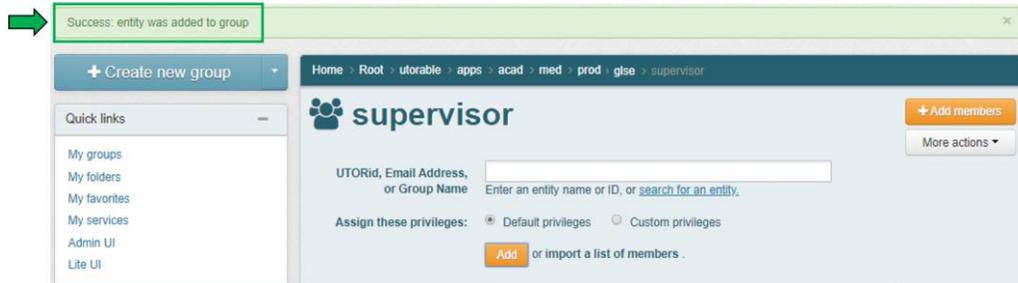
UTORgrouper will query for a valid user account and if found, will display as a selectable option as below. (Note: Faculty with a UT staff status on HRIS and that have activated their UTORid should appear in Grouper search.)

Select by clicking the found name, then click [Add]

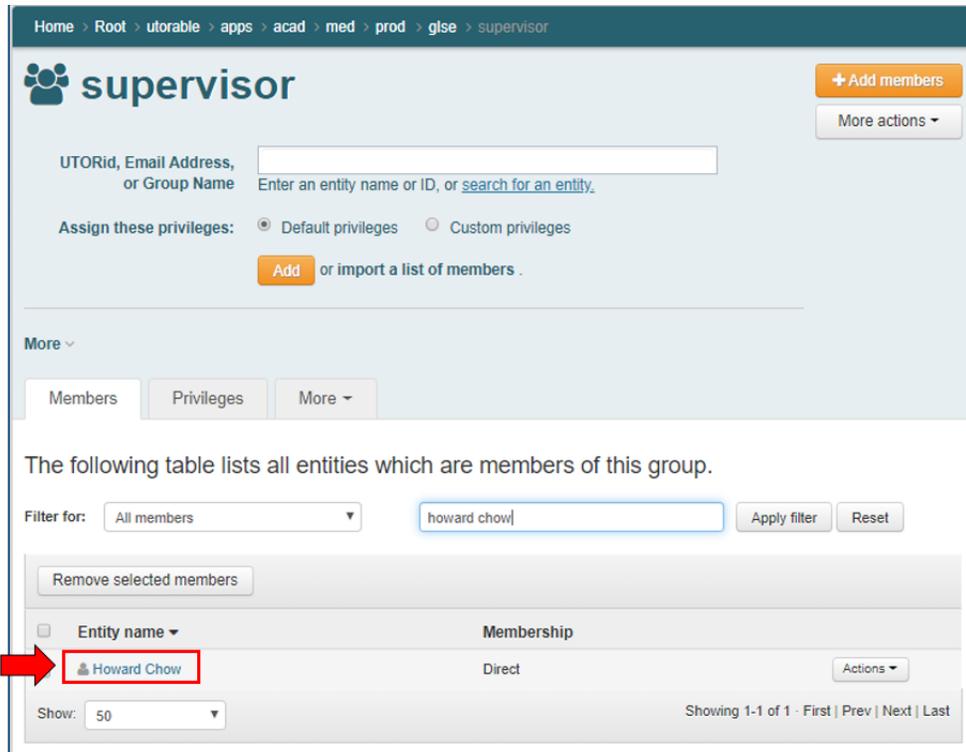


**Note:** Cannot find a match for the UTORID? Grouper relies on exact matches to identify users; check that the UTORID is correct. Alternately, if the UTORID is newly-created, it can take up to 24 hours to propagate into the system.

Confirmation message and *added user* will appear below:



Note: After adding a user on Grouper, it can take one full day before the supervisor name appears on GEMS.



## Adding GUCs to a Group

The steps are very similar to Adding Faculty (Supervisors). The difference is GUCs are assigned to specific graduate unit groups within *coordinator*, while all Supervisors are in the same *supervisor* group.

Navigate as follows:

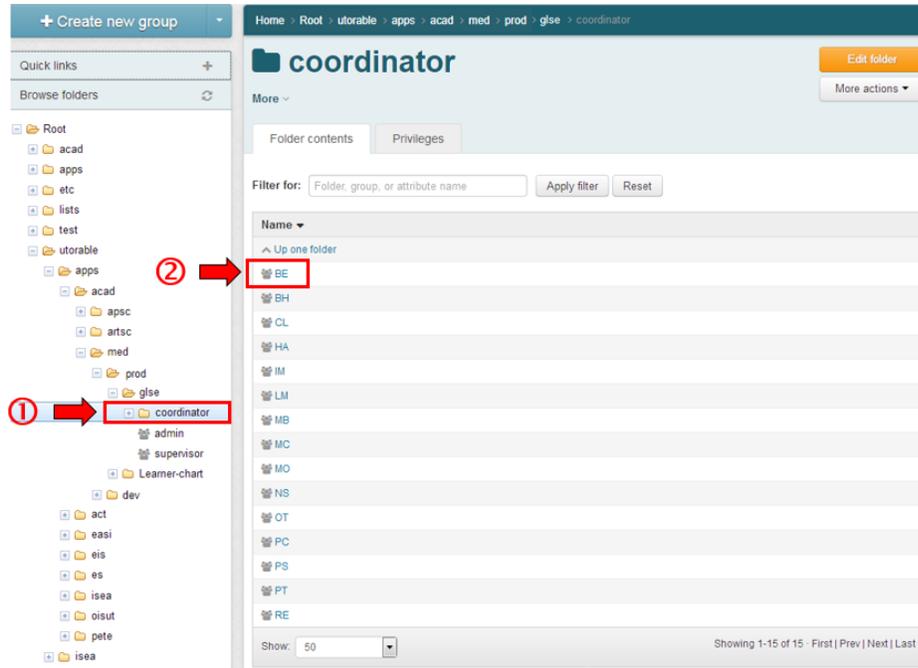
Root -> utorable -> apps -> acad -> med -> prod -> glse -> coordinator -> select department group

Department Folder Codes:

Department Code	Full Name
BE	Institute of Biomaterials & Biomedical Engineering
BH	Department of Biochemistry
CL	Dalla Lana School of Public Health
HA	Institute of Health Policy, Management & Evaluation
IM	Department of Immunology
LM	Department of Laboratory Medicine & Pathobiology
MB	Department of Medical Biophysics
MC	Institute of Medical Science
MO	Department of Molecular Genetics
NS	Department of Nutritional Sciences
OT	Department of Occupational Therapy
PC	Department of Pharmacology & Toxicology
PS	Department of Physiology
PT	Department of Physical Therapy
RE	Rehabilitation Sciences Institute

Example:

1. Click: coordinator
2. Click: BE (the group “Institute of Biomaterials & Biomedical Engineering”)



Then click [+Add members]

Then follow the same steps as for adding supervisors (refer to previous section “Adding Faculty (supervisors) to a Group”)

Note: After adding user on Grouper, it will take one day before the coordinator name appears on GEMS.

## Removing Faculty (supervisors) from a Group

Navigate to the GLSE folder:

Root -> utorable -> apps -> acad -> med -> prod -> glse -> supervisor

1. Select user by checking box beside name,
2. Click [Remove selected members]

Members Privileges More ▾

The following table lists all entities which are members of this group.

Filter for: All members ▾ chow Apply filter Reset

② → Remove selected members

Entity name ▾	Membership	
<input type="checkbox"/> Chung-Wai Chow	Direct	Actions ▾
<input type="checkbox"/> Edward Chow	Direct	Actions ▾
<input checked="" type="checkbox"/> Howard Chow	Direct	Actions ▾

① →

Show: 50 Showing 1-3 of 3 - First | Prev | Next | Last

Confirmation of user removal:



The User will no longer appear in the group list:

Entity name ▾	Membership	
<input type="checkbox"/> Chung-Wai Chow	Direct	Actions ▾
<input type="checkbox"/> Edward Chow	Direct	Actions ▾

Show: 50 Showing 1-2 of 2 - First | Prev | Next | Last

## New Post Codes

If the daily ROSI feed into GEMS contains student records with previously unreported Post Codes, the records with those Post Codes will not be loaded into GEMS. GEMS will skip them and move on to the next row. An error report, with the Post Code information only, is emailed automatically to the Graduate Awards & Data Officer at GLSE. It is the responsibility of the GLSE Officer to inform the Discovery Commons of the new Post Code by submitting a ticket. The Discovery Commons will update the GEMS table that lists the Post Codes that are accepted into GEMS. Once the new Post Code is on the list, GEMS will accept the pertinent student records when they come in on the following morning's feed from ROSI.