

# Setting Up TES Triggers

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Target Audience: UG Administrators

Updated *January 13, 2022*

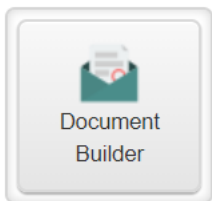
## TES Trigger Dates

For TES reports to be created and distributed to associated faculty, UG Administrators must setup up their TES course activity dates (i.e., end dates), generation dates, and publish dates in the MedSIS Document Builder **before courses begin**.

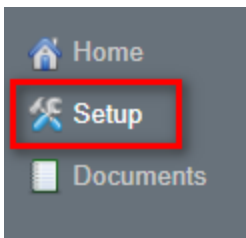
TES setups can be pre-set for the entire year, so long as the UG Admin is aware of the course end dates.

### HOW TO SETUP TES TRIGGER DATES

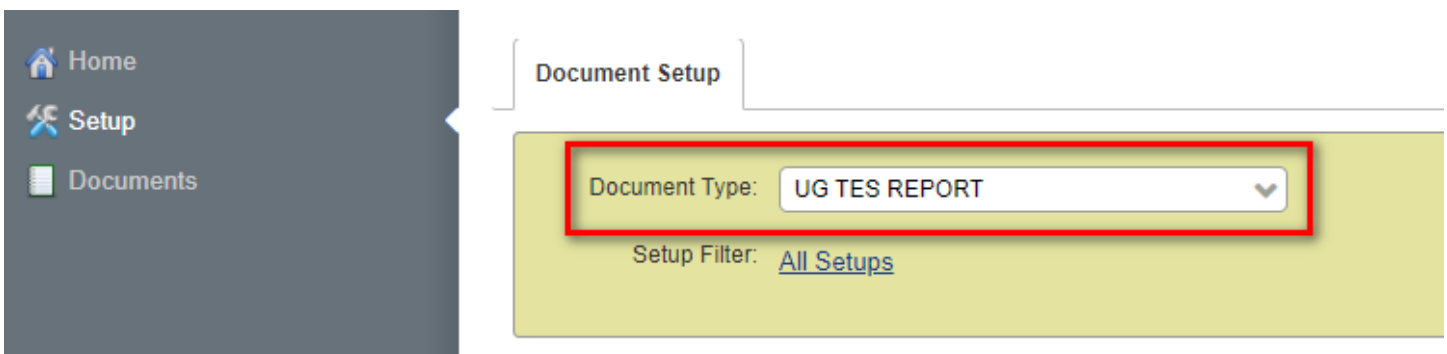
**Step 1:** Select “Document Builder” on the MedSIS dashboard.



**Step 2:** Select “Setup” on the left-hand side menu.



**Step 3:** Select “UG TES REPORT” under the Document Type setup.



**Step 4:** You will only see TES setups for your own courses. You can also search by individual courses by selecting “All Setups” beside the Setup Filter.

Setup Filter: All Setups

Filter ☑ Show Selected

--Load Filter--

**Course**

Search

CLEAR

- [BIOCHEM 707] BIOCHEM 707: Mechanism of Enzyme Action
- [BIOCHEM 710] BIOCHEM 710: Special Topics: Proteins
- [BIOCHEM 711-1] BIOCHEM 711-1: Special Topics in Biomolecular Sciences: Pharmacology in Biomolecular Sciences
- [BIOCHEM 711-2] BIOCHEM 711-2: Special Topics in Biomolecular Sciences: Immunometabolism
- [BIOCHEM 711-3] BIOCHEM 711-3: Special Topics in Biomolecular Sciences: Cancer

Clear Save Apply Close

**Step 5:** To setup the trigger dates for a course, you will need to select the course name under “Setup Name.”

Setup Name	Document Template	Document Type	Setup Details	Activity End Date	Generate Date	Publish Date
[BIOCHEM 707] - Mechanism of Enzyme Action - Graduate Studies Teacher Evaluation Form	Graduate Studies TES Report	UG TES REPORT	Eval Form: Graduate Studies Teacher Evaluation Form [10959] Course: BIOCHEM 707: Mechanism of Enzyme Action			
[BIOCHEM 710] - Special Topics:	Graduate Studies TES Report	UG TES REPORT	Eval Form: Graduate Studies Teacher Evaluation Form [8514]			

**Step 6:** Once selected, you will need to update the Activity End Date. This should indicate the date the course ended.

Document Setup

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**Edit Document Setup**

Setup Name: [BIOMEDDC 701] - Team Project - Graduate Studies Teacher Evaluation Form  
Document Type: UG TES REPORT  
Document Template: Graduate Studies TES Report

**Configuration**

Academic Session: N/A  
Activity End Date: 31-Aug-2021  
Course: Graduate Studies-[BIOMEDDC 701] BIOMEDDC 701: Team Project  
Evaluation Form: Graduate Studies Teacher Evaluation Form [9492]  
Show Comments: YES  
Auto-Generate:  Scheduled  
Auto-Publish:  Scheduled  
Minimum Number of distinct evaluators: 3  
Available Scores: Mean Value, Median Value, Standard Deviation Value  
Available Comparisons: All Teachers

Save Cancel

**Step 7:** You will also need to setup the Auto-Generate trigger date. The date you enter here will determine when your TES forms for that setup will be automatically created in the Document Builder (i.e., move from a status of “Ready” to “Not Published”). **Please note that you can not setup auto-generate for past dates.**

Document Setup

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**Edit Document Setup**

Setup Name: [BIOMEDDC 701] - Team Project - Graduate Studies Teacher Evaluation Form  
Document Type: UG TES REPORT  
Document Template: Graduate Studies TES Report

**Configuration**

Academic Session: N/A  
Activity End Date: 31-Aug-2021  
Course: Graduate Studies-[BIOMEDDC 701] BIOMEDDC 701: Team Project  
Evaluation Form: Graduate Studies Teacher Evaluation Form [9492]  
Show Comments: YES  
Auto-Generate:  Scheduled  
Auto-Publish:  Scheduled  
Minimum Number of distinct evaluators: 3  
Available Scores: Mean Value, Median Value, Standard Deviation Value  
Available Comparisons: All Teachers

Save Cancel

Once you select “Scheduled,” you will then select “Add New.”



**Generate Schedule Details** ✕

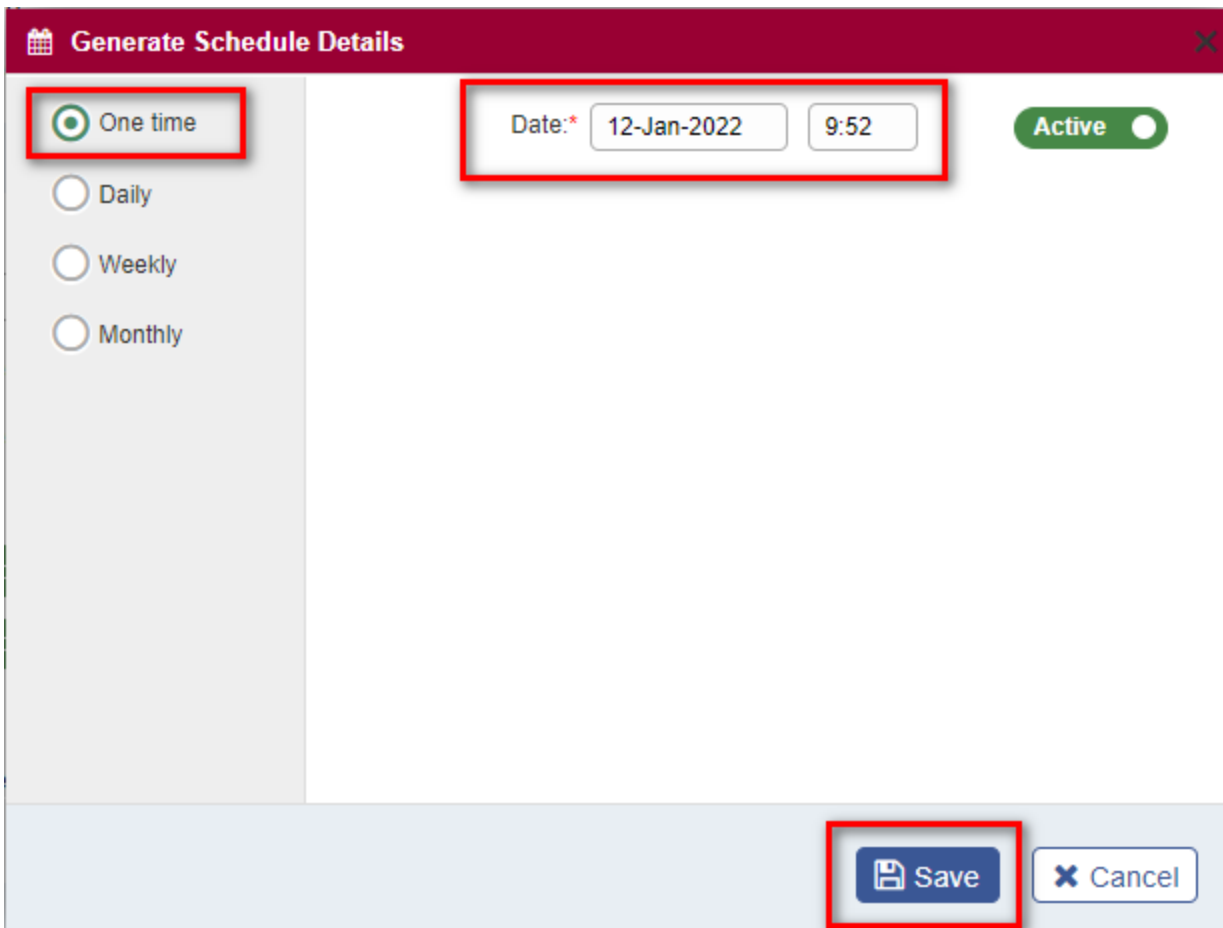
**[BIOCHEM 720] - Scientific Communication - Graduate Studies**  
**Teacher Evaluation Form\_4652**

✓ Active

One time on 30-Sep-2021 at 9:00 a

**+ Add New** **✕ Close**

Please leave the generation schedule setting to “One Time” and remember to save once you have entered your generation date and time.



**Generate Schedule Details** ✕

One time  Daily  Weekly  Monthly

Date:\*   **Active**

**Save** **✕ Cancel**

**\*\*If multiple setups use the same generation date, please set them up at least 10 minutes apart. If you set up multiple generation trigger dates for the same time, you will receive a warning message asking you to adjust the time of the generation set-up.**

**Step 8:** You will also need to setup the Auto-Publish trigger date. The date you enter here will determine when your generated TES forms for that setup will be automatically released to your faculty. **The date entered here must be after your Auto-Generate setup. Please note that you can not setup up auto-publish for past dates.**

Document Setup

Edit Document Setup

Setup Name: [BIOCHEM 720] - Scientific Communication - Graduate Studies Teacher Evaluation Form

Document Type: UG TES REPORT

Document Template: Graduate Studies TES Report

Configuration

Academic Session: N/A

Activity End Date: 31-Aug-2021

Course: Graduate Studies-[BIOCHEM 707] BIOCHEM 707: Mechanism of E...

Evaluation Form: Graduate Studies Teacher Evaluation Form [10959]

Show Comments: YES

Auto-Generate:  Scheduled

Auto-Publish:  Scheduled

Minimum Number of distinct evaluators: 3

Available Scores: Mean Value, Median Value, Standard Deviation Value

Available Comparisons: All Teachers

Save Cancel

Once you select “Scheduled,” you will then select “Add New.”

Publish Schedule Details

[BIOCHEM 720] - Scientific Communication - Graduate Studies Teacher Evaluation Form\_4652

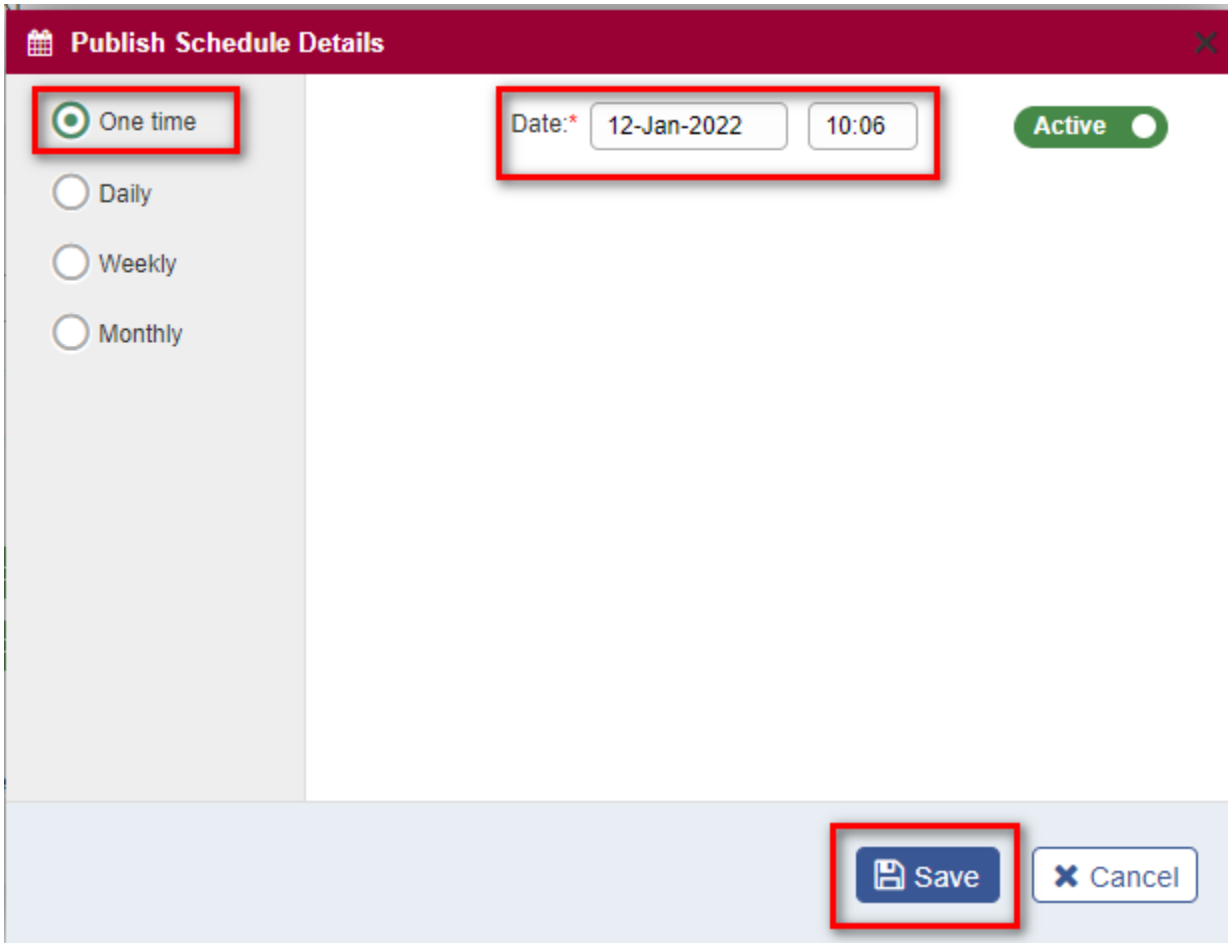
Active

One time on 15-Oct-2021 at 3:18 a

+ Add New

Close

Please leave the publication schedule setting to “One Time” and remember to save once you have entered your publication date and time.



**Publish Schedule Details** [X]

One time

Daily

Weekly

Monthly

Date:\* 12-Jan-2022 10:06

Active

**\*\*If multiple setups use the same publication date, please set them up at least 10 minutes apart. If you set up multiple publication trigger dates for the same time, you will receive a warning message asking you to adjust the time of the publication set-up.**

**Step 8:** Once you have entered your activity end date, generation date and publication date, please save your setup.

Document Setup

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**Edit Document Setup**

Setup Name: [BIOCHEM 720] - Scientific Communication - Graduate Studies Teacher Evaluation Form

Document Type: UG TES REPORT

Document Template: Graduate Studies TES Report

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**Configuration**

Academic Session: N/A

Activity End Date:

Course: Graduate Studies-[BIOCHEM 707] BIOCHEM 707: Mechanism of E...

Evaluation Form: Graduate Studies Teacher Evaluation Form [10959]

Show Comments:  YES  NO

Auto-Generate:  Scheduled

Auto-Publish:  Scheduled

Minimum Number of distinct evaluators: 3

Available Scores: Mean Value, Median Value, Standard Deviation Value

Available Comparisons: All Teachers

### Some Important Notes:

- Please note that there may be multiple evaluation forms attached to each course. If there is, you will need to adjust the setup for each form type.
- You only need to setup TES trigger dates for courses that are active during the training session and have faculty evaluations attached to that course.
- You are only able to change the activity end date, auto-generate date, and auto publish date in the TES setup.
- If you do not see a setup for a course or a specific form for that course, please notify the MedSIS team by submitting a support ticket through the JIRA system.

## QUESTIONS?

If you have any questions or difficulties with this process, please submit them through our ticketing system.

To submit a ticket, please visit [medsishelp.mcmaster.ca](https://medsishelp.mcmaster.ca)

User Guide: [How to Submit a Ticket](#)