

PVM is Your Friend

Taming the Versioning Beast:



Process Version Management

What is it?

Why do we need it?

How does it work?

Why a 'beast'?



What is PVM?

System for handling process elements



- Creating new ones
- Changing existing ones
- Removing unwanted ones

Why do we need a 'system' for that?



Life without PVM

Signature document
Edit it?
No, you'll lose the old wording.

Questionnaire
Correct a mistake in mid-cycle?
No, it's locked.

Material
Need to track who paid what and when?
Sorry. You don't have PVM.



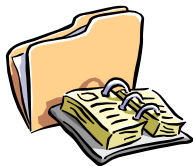
Life with PVM

As application processes change over time you can . . .

- Track changes
- Maintain prior versions
- Link responses to correct versions of questions
- Make changes now, deploy later



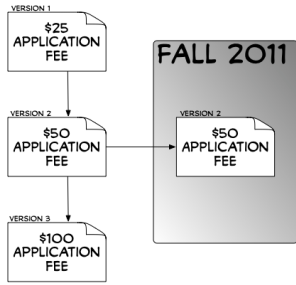
How does it work?



- Versions
- App Cycles
- Maps



Part I: Versions



Part II: Application Cycles

Process Admin > App Cycles

Term	Year	Application Deadline	Decision Date	Active	Edit
Academic Year	2014-2015	01/01/2014	04/01/2014	<input checked="" type="checkbox"/>	
Fall	2014	01/01/2014	03/01/2014	<input checked="" type="checkbox"/>	
Spring	2014	01/01/2014	01/01/2014	<input checked="" type="checkbox"/>	



Part III: The Map

Process Admin > App Cycles > 2013 Fall (edit)

Tabs for each process element

Pre-requisite	Actions	T	P	PG
<input checked="" type="checkbox"/> Academic transcript (Version: #1 - Created on 06/03/2013)		<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/> Essay (Version: #1 - Created on 06/03/2013)		<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/> Consent to View Transcript -incoming		<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/> Foreign Student Agreement (Version: #2 - Created on 06/03/2013)		<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>



Retiring a Question Item

- Retiring does not pull question out of questionnaires that are using it
- Removes it from list of questions that can be used in NEW questionnaires
- Retired questions still appear in Questionnaires that were using it at time of retirement



Steps to Retiring a Question

1. Go to System Settings > Question Items
2. Retire the question item
3. Go to Process Admin > Questionnaires > edit
4. Look in uncategorized folder and un-check the retired question item
5. Update
6. Cascade to appropriate app cycles



Assessments

Like Materials and Learning Content except ...

- New version created on clicking edit pencil

Compared to other process elements

- New version created on clicking update button



What things have versions?

Process elements

- Materials
- Signature document
- Questionnaires
- Question items
- Learning content
- Assessments

Versioned parts

- Version #
- Title
- Instructions
- Content
- Date created
- Date changed



What is not versioned?

Settings

- 'Applies to' setting
- When to display
- Specific terms
- Specific programs
- Parameter filters
- For questionnaires
 - Internal setting
 - Allow to copy

Advising Phase

- process elements (no terms, programs, app cycles)
- Content of linked files (avoid linking files to Signature Documents)



Recommended Practices

Weigh your options

- Retire old and create new?
- Edit existing version?

Best way to create questionnaires

- Create question items first
- Then create questionnaire

Best way to change your process elements

- Plan carefully
- Schedule changes for inactive period of cycle



Resources

Process Version Management

PVM: Cascading Changes to Questionnaires and Materials upon Update

Unchecked Retired Process Element Is Not Displayed as Retired on Process Map

How Do Question Items Function within Process Version Management?