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Degree Works Web Interface User Guide

Release 5.0.1
March 2018



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Ellucian
2003 Edmund Halley Drive
Reston, VA 20191
United States of America

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Introduction

This section provides the basic operational instructions for Degree Works on the Web. Degree Works can be accessed from any computer with an Internet connection and a web browser. Degree Works on the Web is used for processing individual degree audits, What- If scenarios, student planner, addition of notes and exceptions processing.

For more detailed information, consult the Degree Works Technical documentation, which is available in PDF format and can be downloaded to your PC.

The processes used by Degree Works on the WEB are listed below as learning objectives.

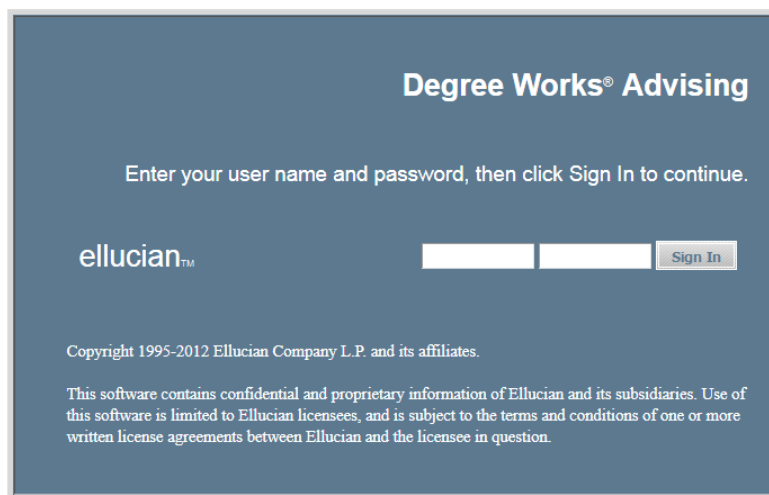
Learning Objectives

After reading this section you will be able to:

- Log onto Degree Works from the WEB
- Identify the WEB functions available
- Process Degree Audits
- Review Historic Degree Audits
- Process What-If Audits
- Use Student Planner
- Enter Notes
- Use Petitions
- Identify Exceptions
- Manage Exceptions
- Report Exceptions
- Deal with links from advice (Course Link)
- Deal with Advice Reports

Logging On

Using an Internet browser, enter the URL of the logon page or access the logon page from a link on your college's home page. To make the connection quick and easy, it is recommended that you create a bookmark for the logon page. Clients using Campus Online (formerly called IRISLink) can access Degree Works from their Campus Online homepage.



In order to gain access to Degree Works, you must have a valid **User ID** and **Password**. Your User ID and Password are alphanumeric values available from your Degree Works administrator. Your User ID and Password also determine what permissions you have as a Degree Works user. Degree Works uses these values to determine which screens you have access to, which functions are available on these screens and what information is displayed. For example, a Student user does not have access to any search functions while a Registrar or Faculty member may have varying degrees of search functionality. Student users will never see the Find Students or the Exceptions buttons.

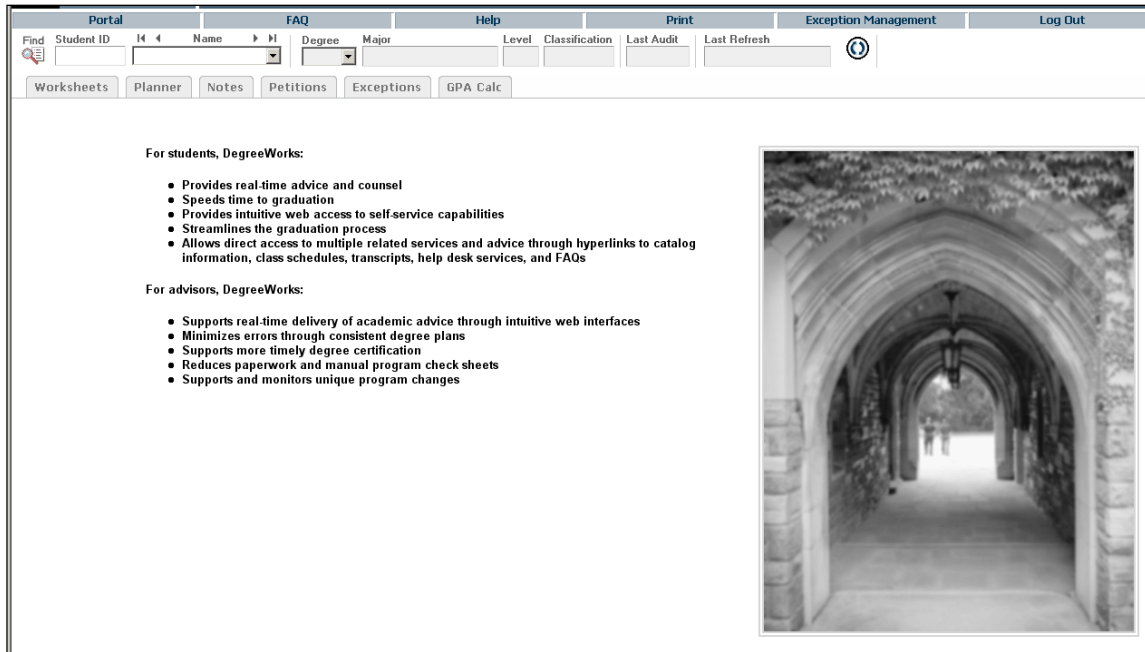
Once you have been validated in the system, you will automatically be taken to the Degree Works Introduction page. This page contains brief information about the Degree Works functions available. The top of the page contains several buttons. These buttons are **Exception Management**, **Help**, **Print** and **Close**. These buttons are located at the top right of the Introduction page.



The Close button is only present for Campus Online clients. This button will close the current window and take you back to the Campus Online access point. You can then select a different Campus Online service without having to logon again. If you do not use Campus Online (Degree Works stand-alone clients), a Logout button will appear in place of the Close button. The Logout button will close the Degree Works window, log you out of Degree Works and take you to an exit screen. You can log back in again by following the link on the exit screen.

Not all Degree Works users will have access to all functions described on this page. The Exceptions and Notes tabs as well as the Exception Management button are not available to

student users by default. The Planner can be made available to students in read-only mode. Your Degree Works administrator can modify these settings if necessary.



All data fields along the top of the screen shot above are yellow except for the **Name** field and **Student ID** field. Yellow fields are non-selectable and cannot be used for search queries. White fields, such as the Student ID field shown above, are active fields. You can search for a student by typing in the students ID into the Student ID field and pressing the Enter key or tab key. Different fields will appear white or yellow depending upon your user class. For students with multiple degrees, the **Degree** drop-down list box can be used to select the degree for audit processing. If your institution does not use the **Major**, **School** or **Level** fields, these fields can be removed from this screen by your Degree Works administrator.

The Name field contains a drop-down list box of students available to the user depending upon your user class. If this drop-down list box contains no values, click the **Find** button to select an individual or group of students. This will open up a new search window.

Once you have selected your population of students, click the OK button in the search window. This will close the search window and load the list of students into the drop-down list box in the Name field on the Introduction page. From this drop-down list box, you will now be able to select individual students for audit processing.

The degree context information for the first student in the list will be automatically loaded once you click OK on the search page.

Find Students

Student ID: First Name: Last Name:

Degree: All Degree Codes
Major: All Major Codes
Sport: No Sport selected
Level: All Level Codes
Minor: All Minor Codes
Academic Standing: All Academic Standings
Classification: All Classification Codes
College: All College Codes
Academic Year: All Academic Year values
Concentration: All Concentration Codes
Degree Source: All Degree Source Codes
Program: All Program Codes
Campus: Campus A
Student Type: All Student Type Codes

Chosen Repeatable Search Criteria:

Students Found: 4

ID	Name ▲	Degree	Major	Level	Classification
<input checked="" type="checkbox"/>	1970 Deans, Jocelyn	BA BFA	Accounting	UG UG	Junior Junior
<input checked="" type="checkbox"/>	B033 Quality, Jonathan	BA MA	Communications	UG GR	Junior Junior
<input checked="" type="checkbox"/>	1954 Sundodger, Payton	BS	Mathematics	U	Sophomore
<input checked="" type="checkbox"/>	1920 Valentino, Rudolph	BS	Mathematics	U	Sophomore

Depending upon your user class, you will either be presented with a list of students assigned to you as advisees or you can select an individual student by entering the students name or Student ID into the appropriate fields on the Introduction page and pressing Enter.

If you do not know the students ID number or if you wish to select a group of students, click the Find button in the upper left-hand corner of the Degree Works screen. This will take you to the Find Students search page. This page (shown above) can be used to select an individual student using name, student ID or SSN, or a group of students defined by other selection criteria. Not all fields shown may be present on your search page. The search fields that appear on this search page can be configured using flags in the UCX-CFG020 SEARCH record in the UCX Tables by your Degree Works administrator.

To select a single student, enter the student's ID number in the Student ID field or enter the student's name in the Name field. Wild cards (@) can be used as part of the search string in any of these fields. A search for "WE@" in the Name field will produce a list of all students who contain "WE" as the first two characters of their first, last or middle name. To search for a group of students, use the other fields to build your search criteria. Students can be selected based upon their College, Level, Degree, Major or any combination of items shown on the search

screen. Click the Search button to execute the search. All students who meet the search criteria will be displayed in the bottom window of the Find Students search window. Use the scroll bars to navigate in the bottom window. Only valid combinations of search criteria will produce search results.

For example, if the Biochemistry major at your institution can only be taken as a Bachelor of Science Degree, then a search for Biochemistry majors pursuing a Bachelor of Arts Degree will not produce any results.

Once you have created a list of students who meet your selection criteria, you can sort the list by clicking on any of the field headers in the Students Found window. The red arrow indicates the sort field being applied to the list of students found. The list of students is sorted by name in descending order as a default. To change the sort from descending to ascending order, click the Name field header again. You will see the red arrow to the right change from a down-arrow to an up-arrow indicating that the name field is being sorted in ascending order. Any changes made to the sort criteria are valid only for the list of students found in the preceding search. If you modify the search criteria and execute a new search, the results will be displayed with Name as the default sort field.

When you have successfully created your list of students using the Find function and entered the sort order, you can delete students from the list by un-checking the check box to the left of the student. Click OK to close the search window and load the list of students into Degree Works. The list of students will load with the same sort characteristics defined on the search page. You may then select any student from the list for degree audit processing. Although it is possible to create a list of students who meet specific selection criteria, Degree Works on the Web can only perform degree audits on one student at a time. To perform degree audit and reporting functions on groups of students, use the Transit batch processing application.

As mentioned earlier, access to search functions is dependent upon permissions associated with the User ID and Password used during the logon process. These user class permissions can be configured in the UCX Tables and/or in the SHPCFG file. Some institutions may limit advisors to having access only to their list of advisees. In this case, a list of student advisees will appear in the Name drop-down list box on the Introduction page after logon. The list of advisees can contain only current students assigned to the advisor or all students assigned to the advisor depending upon the value specified in the UCX-CFG020 WEBPARAMS active term field. If the active term field on this record is filled in with a valid term value, then only those students with a GOAL_DTL record for the active term specified in this record will be included in the list. If the active term field on this record is set to blanks, then ALL students assigned to the advisor will be included in the list regardless of the term specified on the GOAL_DTL record. The Find button will only bring up your list of advisees. You can remove students from the list returned by removing the check mark next to their ID. If you remove students from your drop-down list box by un-checking the checkbox next to them in the search window, you can refresh your list of students by clicking the Refresh Advisees button located at the bottom of the search window.

It is important to keep in mind that if you are allowing your advisors to only see a list of their assigned advisees for the current term, you must update the active term field on the UCX-CFG020 WEBPARAMS record each term. If this record is not updated, your advisors will not be able to see a list of current students and will only be allowed access to students with historic GOAL_DTL records.

Overview of Web Functions

Student Context Area

Once a student has been selected either directly on the Introduction page or using the Find Students search page, the student's information is loaded into the Student Context Area. Then, you can choose the appropriate tab to perform the services you require in Degree Works. The information in the student context area can include:

- **Student ID:** this value can be “masked” based on a UCX-CFG020 WEB setting
- **Name:** if you have multiple students selected, this is a dropdown list of all selected students
- **Degree:** if the student has multiple degrees, this is a dropdown list of all degrees for that student.
Also, if the degree is an applicant degree, the degree code will be followed by an asterisk.
- **Major:** the student's first-sequence major for the chosen degree
(from rad_goaldata_dtl: rad_goal_value where rad_goal_code='MAJOR' and rad_goal_seq=1)
- **Level/School:** the student's level/school (like “Undergraduate”) for the chosen degree
- **Classification:** the student's classification (like “Sophomore” or “Senior”) for the chosen degree
- **Last Audit:** the date an audit was last processed for the chosen degree
- **Last Refresh:** the date the student's Student System data was last verified; ; when you hover over the field you will also see the date when data changes were observed

The screenshot shows the Degree Works Student Context Area interface. At the top, there are navigation tabs: Back to Self-Service, Portal, FAQ, Help, Print, Exception Management, Template Management, and Log Out. Below these tabs is a search bar with a magnifying glass icon and a search button. The search results show a student with ID 1971, Name Deans, Ruari Padraig, Degree BA, Major Mathematics, Level U, Classification Junior, and Campus MA. The Last Audit date is 05-Sep-2013 and the Last Refresh date is 05-Sep-2013 at 3:35 pm. A tooltip indicates that the data was refreshed at 3:35 pm but the last time data changes were observed was at 3:30 pm. Below the search results are several tabs: Worksheets, Planner, Plans, Transfer, Notes, Petitions, Exceptions, GPA Calc, and Admin. The Worksheets tab is selected, showing a Format dropdown menu with Student View selected, and buttons for View, Save as PDF, and Process New. There are also checkboxes for Include in progress classes and Include preregistered classes, and a Class History link.

Each Degree Works service can be selected by clicking the appropriate tab. Each tab in turn brings up one or more screens to be used for that function. Different screens will appear depending on the type of service being processed.

There are two different Audit functions available in Degree Works. The Worksheets tab allows you to run a new audit or review the most recent audit for a student as shown later. Select the desired audit report format from the Format drop-down list box and click the View button to view the most recent audit for that student. To process a new audit for the student, select the desired audit report format and then click the Process New button to run a new audit. The name of the audit report format appears on the top header of the audit report.

The time and date the data for this student was last refreshed from the student system can be seen under the **Last Refresh** label as shown below. Even if no data changes occurred since the last time the student was refreshed the Last Refresh data will still be changed when the bridge is run. However, a separate date and time appear when you hover over this field showing the last date/time data changes were observed. Both of these timestamps together give you the full picture of what happened with the student refresh.

The screenshot shows the ellucian web interface for a student's profile. At the top, there are navigation tabs: Back to Self-Service, Portal, FAQ, Help, Print, Exception Management, Template Management, and Log Out. Below these are search filters for Student ID (1971), Name (Deans, Ruari Padraig), Degree (BA), Major (Mathematics), Level (U), Classification (Junior), and Campus (MA). The 'Last Audit' is 05-Sep-2013, and the 'Last Refresh' is 05-Sep-2013 at 3:35 pm. A tooltip over the 'Last Refresh' field displays two timestamps: 'The last time the data was refreshed was 05-Sep-2013 at 3:35 pm' and 'but the last time the we observed data changes was 05-Sep-2013 at 3:30 pm'. The main content area shows a 'Student View' for AA04926f as of 05-Sep-2013 at 15:35. It includes sections for History, What If, What If History, Look Ahead, Financial Aid, Aid History, Athletic Eligibility, and Athletic Eligibility History. A 'Degree Progress' bar shows 40% completion for Requirements and 37% for Hours. At the bottom, it lists 'BA Liberal Studies Program - Liberal Arts Track' with Academic Year 20052006, Hours Required 141, GPA 2.500, and Hours Applied 52. A note indicates 'Unmet conditions for this set of requirements: You need 60 in ENGL'.

Many of the functions in Degree Works can be configured to show various pieces of data depending upon what your institution deems relevant. While four default audit reports are included in the install as well as two customizable templates, all audit reports can be configured using UCX-RPT036 to show varying pieces of data. Similarly, the What-If screen can be configured to show or hide various fields depending on what data is used for your institution. For example, if your institution does not use the **CONC** or **PROGRAM** fields, you can turn these fields off by changing flags in the UCX-CFG020 WHATIF configuration table. See the Degree Works Technical Guide for more information on configuring the audit reports or What-If screen. The Course Link feature provides the ability to drill down on a course to get additional information provided by your institution.

Processing Degree Audits

Degree audits are processed using the Worksheets tab. To access this screen, select the student you wish to process. This will automatically take you to the Worksheets screen and the most recent audit for this student will load automatically.

The student context information will be displayed in the fields at the top of the window once the student has been selected. This information includes current degree pursuit, major, school, student level and the date the last audit was processed. To process a new audit for the student select the Process New button. To include In-Progress classes or to include pre-registered classes, place a check in the appropriate check box.

The Include in-progress classes and Include pre-registered classes check boxes are checked by default. Be sure to select the appropriate audit report format prior to clicking the Process New button.

The screenshot displays the 'Worksheets' tab interface for processing a degree audit. At the top, navigation tabs include Portal, FAQ, Help, Print, Exception Management, and Log Out. The main header shows student details: Student ID (**34), Name (Student, Stephen), Degree (BA), Major (Accounting), Level (UG), Classification (Senior), Last Audit (09/03/2008), and Last Refresh (at 12:20 a.m.). Below this, the 'Worksheets' section includes a 'Format' dropdown set to 'Student View', a 'View' button, a 'Process New' button, and two checked checkboxes: 'Include in-progress classes' and 'Include preregistered classes'. A 'Class History' link is also present.

The 'History' section on the left lists categories: What If, Look Ahead, and Financial Aid. The main content area shows 'Student View AA000964 as of 09/03/2008 at 13:43' with a table of student details:

Student	Student, Stephen	Level	Undergraduate (UG)
ID	**34	College	
Advisor 1	Advisor, Test	Degree	Bachelor of Arts
Advisor 2		Major	Accounting
Overall GPA	2.773	Classification	Senior

Below the table, 'Degree Progress' is shown with two progress bars: 'Requirements' at 76% and 'Credits' at 51%.

The requirements section is divided into two parts:

- Bachelor of Arts Degree** (Academic Year: 2002-2003, Credits Required: 186, GPA: 2.773, Credits Applied: 94). Unmet conditions: 92 Credits needed.
 - Higher Education GPA Above 2.0
 - Major Requirements (Still Needed: See Major in Accounting section)
 - Elective Courses (Still Needed: See Electives section)
 - Planner Block (Still Needed: See Planner Block section)
- Major in Accounting** (Academic Year: 2002-2003, Credits Required: 115, GPA: 2.895, Credits Applied: 19). Unmet conditions: 96 Credits needed. 19 Credits in systems needed.

The nightly batch process checks for data changes for each student and runs a new audit for those students with changed data. The audit you see when the student is loaded will reflect their most recent academic data. However, you may wish to click Process New to run a new audit at any time to reflect changes to requirements or to configuration settings.

Once the audit has been processed, the audit report will be displayed in the format selected prior to processing. As mentioned earlier, the audit information displayed depends upon the UCX-RPT036 configuration settings for the audit report format selected.

Historic Degree Audit

The History option allows you to view historical audits for a student. Degree Works can be set to save anywhere from 1-99 audits per student. To view saved historical audits, click the Worksheets tab, and then the History option to bring up the audit history page shown below.

The screenshot shows the top navigation bar with tabs: Portal, FAQ, Help, Print, Exception Management, and Log Out. Below this is a search and filter section with fields for Student ID (**34), Name (Student Stephen), Degree (BA), Major (Accounting), Level (UG), and Classification (Senior). It also shows Last Audit (09/03/2008) and Last Refresh (at 12:20 a.m.). A row of tabs includes Worksheets, Planner, Notes, Petitions, Exceptions, and GPA Calc. The Worksheets tab is active, showing a Format dropdown (Student View) and a Historic Report dropdown (AA000964 09/03/2008 13:43 UG BA) with a View button. The History link is highlighted with a mouse cursor, and a dropdown menu is open showing 'History - Introduction Page' as the selected item. A 'What If' section at the bottom contains the text: 'Choose a report format and an historic report and click View.'

Select the historic audit from the Historic Report drop-down list box and the audit Format to view.

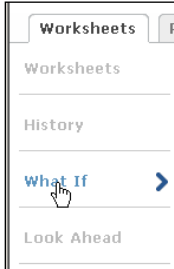
This screenshot is similar to the previous one but shows the Historic Report dropdown menu expanded. The menu lists several entries: AA000964 09/03/2008 13:43 UG BA, AA000963 09/03/2008 13:35 UG BA, AA000961 09/03/2008 13:34 UG BA, AA000931 09/02/2008 13:24 UG BS, and AA000929 09/02/2008 13:16 UG BS. The mouse cursor is pointing at the last entry. The 'History - Introduction Page' option remains selected in the background.

Click the View button to view the historic audit in the selected format.

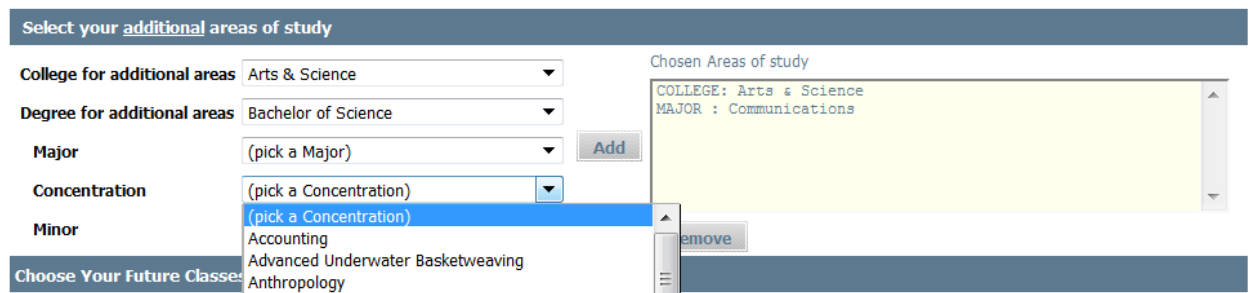
If the audit history depth is set to 1 in the UCX-CFG020 DAP14 record, then the Historic Report drop-down list will contain only a single entry. You may want to decrease the number of saved audits to conserve disk space on your Host hard drives.

What-If Audits

What-If audits allow you to process speculative degree audits for a student using their current class history. To access the What-If screen, click the What-If tab located on the Introduction page.



You can audit a student against the requirements for a different major, minor, degree, catalog year or any other selectable item on the What-If Audit screen. To generate a What-If degree audit, select the requirements you wish to audit the student against. The selected items will be moved to the window on the right.



To deselect an item from the window, highlight the item then click the Remove button located below the window.

When generating the requirement criteria for a What-If audit, it is important to make sure that only valid combinations are entered in the requirement selection criteria drop-down list boxes. For example, if the Anthropology major can only be completed in the Undergraduate school, choosing Anthropology in the Major drop-down list box and Business School in the School field represents an invalid combination and will generate an audit error.

The screenshot shows the 'What-If' audit tool interface. At the top, there is a navigation bar with tabs: Worksheets, Planner, Plans, Notes, Petitions, Exceptions, GPA Calc, and Admin. Below the navigation bar, there is a 'Format:' section with a 'Student View' dropdown, a 'Process What-If' button, and a 'create PDF' checkbox. There are also two checked checkboxes: 'Include in-progress classes' and 'Include preregistered classes'. The 'What-If' section is highlighted in blue and contains three dropdown menus: 'Level' (Pick a Level), 'Degree' (Pick a Degree), and 'Academic Year' (Pick an Academic Year). Below this is a section titled 'Choose Your Different Areas of Study' with a text input field 'Select an item to add it to your Chosen Area of Study' and three dropdown menus: 'Major' (Pick a Major), 'Minor' (Pick a Minor), and 'Concentration' (Pick a Concentration). To the right of these dropdowns is a 'Chosen Areas of study' list box and a 'Remove' button. Below that is a section titled 'Choose Your Future Classes' with a text input field 'Enter a course and click Add Course' and two dropdown menus: 'Subject' and 'Number'. To the right of these dropdowns is a 'Courses you are considering' list box and a 'Remove Course' button.

The What-if page can operate in a different mode based on the curriculum rules stored in the student system. When this option is enabled, the picklists on the page are driven from either the program or from the school, degree, and college combination. The primary major, minor and concentration are driven from the primary school, degree and college chosen and appear at the top of the page while the additional areas of study are driven from additional rules chosen – but only if your institution allows another rule to be chosen.

It is important to remember that What-If audits may not be stored in the database. A configuration flag in UCX-CFG020 DAP14 controls whether What-If audits are saved to the database or not. After they are run, the results can be printed, but after leaving the What-If screen, the audit cannot be accessed again if it is not being saved. If What-if audits are being saved a “Save as PDF” button will appear on the results page allowing the user to save the audit as a PDF. Regardless of whether What-if audits are being saved the user may also check the “create PDF” checkbox next to the “Process What-if” button on the previous page. The PDF option, therefore, appears on the first and second pages for convenience.

Saved What-If audits can also be accessed from the What-if History tab.



Student Educational Planner

The Student Educational Planner (SEP) is a tool in Degree Works that students and advisors use to create academic plans. Pre-defined plans, or templates for particular programs of study, can be created ahead of time and loaded for student advising. Once a plan is populated it may be modified as needed. The SEP format allows courses from the degree audit to be pulled into the plan with a simple drag and drop action.

The screenshot displays the Student Educational Planner (SEP) interface. At the top, there are navigation tabs: Portal, FAQ, Help, Print, Exception Management, and Log Out. Below these are search and filter options for Student ID, Name, Degree, Major, Level, Classification, and Last Audit. The main interface is divided into two main sections: a left sidebar for templates and a main workspace.

Planner Worksheet (Left Sidebar):

- Student: Gerrard, Stephen M 19
- ID: ****
- Advisor 1: Lockhart, Gilderoy A
- Advisor 2: [Blank]
- Overall GPA: 3.000
- Level: Undergraduate School
- College: [Blank]
- Degree: BACHELOR OF ARTS
- Major: Drama
- Classification: [Blank]

Degree Progress (Left Sidebar):

- Requirements: 13% (Progress bar)
- Units: 60% (Progress bar)

Unmet conditions (Left Sidebar):

- 74 Units needed
- Minimum Units unsatisfied
- MAJOR REQUIREMENTS
- Needed: MAJOR block was not found but is required**
- Foreign Language Requirements
- Needed: See Foreign Requirement section**
- Ed Plan Requirements
- Needed: See You'll never walk alone section**
- Blocks included in this block: Foreign Requirement, You'll never walk alone
- Foreign Requirement
- FOREIGN LANGUAGE REQUIREMENT
- Multi-Cultural Studies
- Needed: Choose from 1 of the following:**
- Spanish Culture

Student Educational Planner (Main Workspace):

- Student: Gerrard, Stephen M 19
- Current Term: Summer 2003
- Description: Alternative Plan for Drama Major
- Academic Year: 2002-2003
- Active Plan
- Locked

Course List (Main Workspace):

- Fall 2003**
 - MATH 1110: 3
 - STAT 1000: 3
 - ANTH 3410: 3
 - ENGL 3003: 3
 - SOME ELECTIVE: 5
 - Total: 17
 - Notes: I need to decide which elective to take. Right now I am considering ART 1034 or MUSC 1944.
- Winter 2004**
 - ANTH 3000: 3
 - PHIL 3332: 3
 - ART 2200: 3
 - SPCH 4860: 3
 - WELS 100: 3
 - MATH 7513: 3
 - Total: 18
 - Notes: WELS 100 can be taken from 2 to 4 credits. I will register for 3 credits.
- Spring 2004**
 - ACCT 1101: 3
 - ACCT 1102: 3
 - Total: 6
 - Notes: This term I may go to France -- or it may need to change.

At the bottom of the interface, there are buttons for Save Plan, Reload Form, Save As..., Delete Plan, Process New, Check All Terms, and Uncheck All.

Setup

Setup the UCX-CFG020 PLANNER record

Planner Name and Planner Type

Two views are available in SEP. A plan can be viewed in “Calendar” mode with each year represented as a row of terms; in this mode there is only a single notes field at the bottom of the plan. The plan can also be viewed in “Note” mode where a note field appears next to each term and the terms are presented in one single column – top to bottom.

Placing N in **Planner Type 1** tells SEP that the Note View should be the default view; placing C in **Planner Type 1** will make the Calendar View the default. An appropriate name should be placed in the **Planner Name 1** field to match the view in **Planner Type 1**. You can choose to leave **Planner Type 2** blank so that your users only get one view; no option is given. Placing a C or N in **Planner Type 2** gives your users an option of views.

The **Allow changes to past terms** field controls plan modifications for historic terms and the current term. Setting this flag to N tells SEP to show historic terms as gray and read-only so that no changes can be made; the student’s active term is also read-only. You may want to prevent users from modifying their plans for historic terms if you plan on running statistical reports on what courses were planned versus those taken. It is strongly recommended that this be set to “N.”

The **Allow changes current term** field works in conjunction with the Allow changes to past term. If Allow changes to past term is set to “Y”, then Allow changes to current term is ignored, because it means that all terms are allowed. If, however, Allow changes to past terms is set to “N”, this flag determines whether the current term (the student’s “Active Term”, as defined on the rad_student_mst.rad_term) is editable.

The **Show School, Show Degree, Show Major, Show Minor, Show Concentration, Show College, Show Liberal Learning, Show Specialization, Show Program** flags are used when searching for templates to pull into a new plan and when searching and saving templates on the Templates tab. If all templates are for an undergraduate school, you may want to hide the school drop-down list. Community colleges without majors may wish to hide the major drop-down list.

The **Show Completed Classes Default** field sets the default for the “Show completed classes” checkbox on the Planner interface. If the Allow changes to past terms field is set to “Y”, then it is strongly recommended that this field be set to “N” so that completed courses are NOT included in the plan.

Surecode – UCX-CFG020 Example

CFG020

Show All Tables

CFG020: Configuration - PLANNER

Key	Years in planner	Terms per year	Classes per term	Reserve	Advisor Label	Audit Rep
PLANNER	5	3	9		Advisor	WEB31

Edit mode: PLANNER

Key *

Years in planner

Terms per year

Classes per term

Reserved

Advisor Label

Audit Report

Planner Name 1

Planner Type 1

Planner Name 2

Planner Type 2

Allow changes to past terms

Show School

Show Degree

Show Major

Record Details

Revision

Who

Mgr, Degree Works

Timestamp

3/18/14 20:25:52

Setup the UCX-CFG072 table

UCX-CFG072 Overview:

1. UCX-CFG072 controls which courses may be saved in specified terms in SEP plans.
2. You may not create registration records for more than one or two future terms but this table allows you to indicate your best guess at when courses will be offered.
3. Courses that are offered every term do not need a record in UCX-CFG072; the absence of a UCX-CFG072 record means a course is allowed in any term.
4. Validation against the course-mst will occur if no UCX-CFG072 record is found; only courses offered by the institution are allowed in plans.
5. Some course offerings are known only one term in advance; such courses may not be appropriate for UCX-CFG072.
6. Since users may not be allowed to modify courses in historic terms and their active term validation is only performed on courses for future terms.

UCX-CFG072 Details:

1. The key into UCX-CFG072 is the discipline + course number – no spaces; eg, MATH123, PE101, ART106.
2. Up to 16 terms may be specified for each course.
3. Wildcards and the negation operator (!) may be used instead of a specific term value.
4. A Message to User may be entered to tell the user when a course can or can't be planned.
5. Leaving Message to User blank results in a generic message to the user; eg, "Not offered in this term".
6. A match made to any of the terms values passes the validation.

Term value guide

Term value	Meaning
@	Any term
@03	Any term ending in "03"
2008@	Any term starting with 2008
200803	This specific term
!@03	Any term but those ending in "03"
!200803	Any term but this specific term
!@	Not valid in any term

Renumbered courses

You can specify !@ as the term value. This could be useful for course number changes. If HIST 106 has been renumbered to HIST 123 you may want to create a HIST106 entry in UCX-CFG072, specify !@ as Term 1, and create a Message to User of "HIST 106 is now offered as HIST 123". Users entering HIST 106 in their plan will be told exactly what to do when they attempt to save.

Skipping validation

If a course is found on a plan with a hyphen as the first character, then the validation check will be skipped. For example, if the user enters "-BIOL 109" no validation will be performed in UCX-CFG072 or against the course-mst. This allows you to store a course even if it is really not allowed in that term or not offered at your institution. Any statistical reporting you do against the planner data will be skewed if a lot of plans are stored with this character imbedded as it is stored in the database with the hyphen in front of the discipline.

Updating UCX-CFG072 each year/term

Table UCX-CFG072 should be updated with each new term. Since validation is not performed on historic terms you can clean out old term values and insert new ones as course offerings change.

Curriculum planning

The students' planner information, in combination with the CPA degree audit information should help better define exactly when an institution needs to offer certain courses – consequently accurate information in UCX-CFG072 will make the CPA data more accurate and helpful.

Surecode - UCX-CFG072 Example

The screenshot displays the 'CFG072: Planned courses per term' interface. At the top, there is a header with 'CFG072' and a 'Show All Tables' button. Below the header is a toolbar with various icons for navigation and editing. A table below the toolbar shows columns for 'Key' and terms 1 through 10. The 'Key' column contains 'MATH101' and the 'Term 1' column contains '@'. The main content area is titled 'Edit mode: MATH101' and includes 'Instructions' for specifying terms. Below the instructions is a form with input fields for 'Key *' (containing 'MATH101') and 'Term 1' through '7'. A 'Record Details' sidebar on the right shows fields for 'Revision', 'Who' (containing '[User Not Found]'), and 'Timestamp' (containing '8/2/08 02:47:55').

Setup the Web Planner flag in UCX-STU016 and UCX-STU035

- Term drop-down lists appear within SEP. You may want to prevent users from creating plans for very old terms or certain future terms. The **Web Planner** flag in UCX-STU016 should be set to Y only for those terms that you want to show in the planner and template screens.
- Catalog year drop-down lists appear within SEP. You may want to prevent users from creating plans for very old catalog years or certain future catalog years. The **Web Planner** flag in UCX-STU035 should be set to Y for only those catalog years that you want to show in the planner and template screens.

Web Interface

Planner

- Access to the Planner tab for SEP is given by the SDSEP key.
- You may use SHPCFG to restrict access to this service as you wish.
- Users with the SDSEPMOD key are allowed to both Edit and View plans.
- Users with only the SDSEP key, not the SDSEPMOD key, cannot Edit plans.

PLANNER CONTROLS

Plan list

- The plan number and description for each of the student's list of plans are shown
- An entry for "Add New Plan" allows the creation of a new plan
- Active and inactive plans appear
- Plans appear in order by plan number

Mode options

- Notes mode – terms are listed top to bottom with notes for each term (see UCX-CFG020 PLANNER)
- Calendar mode – each "year" of terms is a row (see UCX-CFG020 PLANNER)
- Planned vs Taken – compare planned courses to those actually taken by the student

Show completed classes

- For past terms and current term allows classes taken to be shown instead of those planned
- Default behavior is based on the UCX-CFG020 PLANNER "Show Completed Classes Default"
- If checked, it will not allow modification of past terms. This guards against saving completed courses into Planned terms.

Edit vs View

- Edit allows users to modify the plan
- View gives a report that is good for printing
- Planned vs Taken assumes View even if not selected

Test Plan ▼ | Notes Mode ▼ Show completed classes Load Edit View

Planner Body

Planner Edit

1. Degree Audit appears in the left frame
2. Plan appears in the right frame
3. The left and right frames can be resized by dragging the gray separating bar
4. Historic terms are shown in gray (disabled) based on the UCX-CFG020 PLANNER flag.
5. Classes taken and their grades are shown for completed terms based on the **Show completed classes** checkbox
6. Courses from the audit can be dropped into a plan using **drag-n-drop**
7. When a class is dropped into the plan the credits for the course will show in the box to the right of the course (only available in Internet Explorer and Firefox 3.5).
8. If a user types a course into the plan clicking Save Plan will populate the credits field.
9. If it is a variable credit course the user may change the credits to the high or low value based on what is in the catalog; the user will get an error if the credits value entered is invalid.
10. A total number of credits appears beneath each term and a plan total of credits appears at the bottom of the plan. Both sets of total credits are updated as the user makes changes.
11. Users with the SDPLNAUD key are shown the Process New button and checkboxes appear next to each term
12. When a new audit is run classes from the plan appear in the audit in blue with a term value of PLANNED; the credits from the plan are used in the audit.
13. Plan buttons appear in the bottom right
 - a. **Save Plan** – saves contents of plan
 - b. **Reload Form** – start over
 - c. **Save As...** - save the data as a new plan
 - d. **Delete Plan** – delete this current plan – confirmation message appears
 - e. **Process New** – runs a new audit with planned courses applied to rules
 - f. **Check All Terms** – check the boxes for all future terms to be included in a new audit
 - g. **Uncheck All** – uncheck all boxes for all future terms
14. **Description** field is used to distinguish one plan from another if the student has multiple plans
15. **Academic Year** field is also helpful if the student has multiple plans but also useful for reporting purposes
16. The **Active** checkbox can be used to deactivate a plan (put it on hold); also useful for reporting purposes
17. Clicking **Print** in the top-right of the plan frame prints just the plan frame

Portal FAQ Help Print Exception Management Log Out

Find Student ID: **** Name: Gerrard, Stephen Degree: B.A. Major: Drama Level: U Classification: Last Audit: 09/26/2008

Worksheets **Planner** Notes Petitions Exceptions GPA Calc Admin

Planner B.A. Alternative Plan for Drama Major Notes Mode Show completed classes Load Edit View

Templates

Planner Worksheet WA001017 as of 10/03/2008 at 15:56

Student	Gerrard, Stephen M 19	Level	Undergraduate School
ID	****	College	
Advisor 1	Lockhart, Gilderoy A	Degree	BACHELOR OF ARTS
Advisor 2		Major	Drama
Overall GPA	3.000	Classification	

Degree Progress

Requirements 71%

Units 92%

Bachelor of Arts Degree

Unmet conditions 14 Units needed
Minimum Units unsatisfied

MAJOR REQUIREMENTS

Needed: MAJOR block was not found but is required

Show What If Options Use What If Scenario

Student Educational Planner Print

Student: Gerrard, Stephen M 19

Current Term: Summer 2003

Description: **Alternative Plan for Drama Major**

Academic Year: 2002-2003

Active Plan
 Locked

Fall 2003

MATH 1110	3	Notes I need to decide which elective to take. Right now I am considering ART 1034 or MUSC 1944.
STAT 1000	3	
ANTH 3410	3	
ENGL 3003	3	
-SOME ELECTIVE	5	
Total	17	

Save Plan Reload Form Save As... Delete Plan

Process New Check All Terms Uncheck All

What If Planner Audits

1. UCX-CFG020 PLANNER **Show What-If Option** flag turns this ability on/off
2. What If frame appears on the bottom left of the page
3. Clicking the **Show What If Options** button enlarges the What If frame
4. User may select desired degree and major information
5. Clicking Process New will run a new audit
6. Only when **Use What If Scenario** is checked will a What If audit be processed
7. When the checkbox is unchecked the student's normal degree is used
8. Clicking the **Hide What If Options** button shrinks the What If frame
9. User may resize the frame manually by dragging the separator bar

Show What If Options Use What If Scenario

Planner Worksheet WA000994 as of 09/25/2008 at 15:58 **What If Audit**

Student	Gerrard, Stephen M 19	Level	Undergraduate School
ID	****	College	
Advisor 1	Lockhart, Gilderoy A	Degree	BACHELOR OF ARTS
Advisor 2		Major	Accountancy
Overall GPA	3.000	Classification	

Hide What If Options Use What If Scenario

What-If

Academic Year: 2009-2010

Choose Your Different Areas of Study

Select an item to add it to your Chosen Area of Study

Major: Pick a Major

Minor: Pick a Minor

College: Pick a College

Concentration: Pick a Concentration

Chosen Areas of study

MAJOR : Accounting
MINOR : Business Administration

Calendar mode

- Terms are arranged in rows by year
- A single notes box appears at the bottom of the plan

Student Educational Planner		Print																																																				
Student	Gerrard, Stephen M 19																																																					
Current Term	Summer 2003																																																					
Description	Alternative Plan for Drama Major																																																					
Academic Year	2002-2003																																																					
<input checked="" type="checkbox"/> Active Plan <input checked="" type="checkbox"/> Locked																																																						
<input type="checkbox"/> Fall 2003	<input type="checkbox"/> Winter 2004	<input type="checkbox"/> Spring 2004																																																				
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Save Plan	Reload Form	Save As...	Delete Plan																																																			
Process New	Check All Terms	Uncheck All																																																				

General Notes section

A general notes section appears at the bottom of the plan

Plan Notes

If I decide to change my major, I need to readjust this plan.
However, the classes for the first few terms should be okay to keep
since they are for the general education requirements.

Classes Completed in Unplanned Terms

1. When the **Show completed classes** box is checked, the classes already taken will replace those that were planned for historic terms.
2. Classes taken not fitting into any term specified on the plan appear in a section at the bottom of the plan
3. Classes appear organized by term along with their final grade
4. Transfer classes will also appear in a section at the bottom of the plan; no transfer classes will ever appear in the plan itself.

Classes Completed in Unplanned Terms		
Term	Class	Grade
Winter 2001	PHIL 103	C
Fall 2001	ENGL 3100	F
	MATH 1030	A
	MATH 303	A
	MATH 304	A
	MATH 335	A
Winter 2002	COMA 115	NA
	FIN 301	A
	MGMT 3614	A
Spring 2002	CMS 328	C
	CMS 330	B
	CS 3590	C
Winter 2003	COMA 249	A
	FREN 200	C
	HIST 101	A
	HIST 103	A
	HIST 2296	A

Loading a pre-defined plan

1. Clicking Load in a pre-defined plan opens a search window
2. The School, Degree, Major and Catalog Year default to the values found on the student's degree record
3. Clear All may be used to clear all fields
4. The UCX-CFG020 PLANNER flags control whether School, Degree, Major, Minor, Concentration, College, Liberal Learning, Specialization, and Program appear
5. Clicking Search queries the dap-template-mst records using the search values
6. The search results are shown in the bottom half of the page
7. Choosing a pre-defined plan and clicking Load into my plan populates the template into the student's new plan
8. After the window closes the template is populated into the student's new plan
9. The user must click Save Planner to save the new plan

The screenshot shows a window titled "Pre-defined Plan Search". It contains several dropdown menus for search criteria: Level (All Levels), Degree (All Degrees), Major (All Majors), Major (All Minors), Concentration (All Concentrations), College (All Colleges), Liberal Learning (All Liberal Learnings), Specialization (All Specializations), Program (All Programs), and Academic Year (All Academic Years). Below these are "Search" and "Clear All" buttons. A section titled "Search Results: 23 pre-defined plans found" contains a list of results in a scrollable area, including "A Geography major with History minor", "Accounting major", "Accounting Major - Fall 2005", "Accounting major 2008", "Anthropology certificate", "Art History", "BA History 07/08", "Biology major - Chem minor", "Brett test new template fields", "D02 Test Template", "Degree Plan for Art I Major Fall 2007 - Spring 2009", "Degree Plan for Art Major Fall 2007 - Spring 2009", and "DRP Math major with Comp Sci minor - 06/07". A "Load into my plan" button is located at the bottom of the results list.

Course Validation

1. Before a plan can be saved the courses are validated
2. Courses are validated against UCX-CFG072 to be sure they can be taken in the given term
3. Courses not found in UCX-CFG072 are checked against the course_mst to be sure they are offered by the institution
4. If one or more courses are found to be invalid, then the plan is not saved and an error message is shown to the user
5. A red arrow appears next to each course found to be invalid
6. When the mouse is placed over the red arrow a reason why the course is invalid will appear
7. The red arrow message will be the UCX-CFG072 Message to User or “not offered at this institution” message
8. The plan cannot be saved until all problems have been resolved.
9. Placing a hyphen as the first character in a course will tell the system to skip the validation check. This is sometimes done so the entry can be a placeholder on the audit, or allow a class that has not yet been entered into the course_mst to be used in the plan.



Viewing Plans

1. Clicking on the View radio button produces a report that is better for printing
2. Users that do not have permission to edit plans will be given this view option only
3. As with editing, Calendar mode and Notes mode are supported

Notes mode





Student Educational Planner		Print
Student	Gerrard, Stephen M 19	
Current Term	Summer 2003	
Description	Alternative Plan for Drama Major	
Academic Year	2002-2003	
Active/Inactive	Active Plan	
Special Note	Your completed classes are shown instead of planned courses	
► Fall 2003		
Course	Units	I need to decide which elective to take. Right now I am considering ART 1034 or MUSC 1944.
MATH 1110	3	
STAT 1000	3	
ANTH 3410	3	
ENGL 3003	3	
-SOME ELECTIVE	5	
	0	
Total	17	
► Winter 2004		
Course	Units	WELS 100 can be taken from 2 to 4 credits. I will register for 3 credits.
ANTH 3000	3	
PHIL 3332	3	
ART 2200	3	
SPCH 4860	3	
WELS 100	3	
MATH 7513	3	
Total	18	
► Spring 2004		
Course	Units	This term I may go to France -- so it may need to change.
ACCT 1101	3	
ACCT 1102	3	
ECON 3005	3	
FIN 3300	3	

Calendar mode

Student Educational Planner		Print			
Student	Gerrard, Stephen M 19				
Current Term	Summer 2003				
Description	Alternative Plan for Drama Major				
Academic Year	2002-2003				
Active/Inactive	Active Plan				
Special Note	Your completed classes are shown instead of planned courses				
► Fall 2003		► Winter 2004			
Course	Units	Course	Units	Course	Units
MATH 1110	3	ANTH 3000	3	ACCT 1101	3
STAT 1000	3	PHIL 3332	3	ACCT 1102	3
ANTH 3410	3	ART 2200	3	ECON 3005	3
ENGL 3003	3	SPCH 4860	3	FIN 3300	3
-SOME ELECTIVE	5	WELS 100	3	ART 4720	3
	0	MATH 7513	3	FREN 1010	3
Total	17	Total	18	Total	18
► Fall 2004					
Course	Units	Course	Units	Course	Units
MGMT 3620	3		0		0
BUS 4500	3		0		0
MKTG 3405	3		0		0
ART 1010	3		0		0
	0		0		0
	0		0		0
Total	12	Total		Total	

Planned vs Taken

1. Choosing the Planned vs Taken mode and clicking Load shows this special report
2. The Show completed classes box must be checked for this report to be useful
3. The report highlights the classes that were both planned and taken for a given term
4. Classes planned but not taken and taken but not planned are not highlighted
5. A green balloon appears if all classes planned were actually taken
6. A green balloon face will still appear if classes taken beyond those planned were taken
7. A red balloon will appear if not all of the planned classes were taken in a given term

Student Educational Planner Print					
Student		Gerrard, Stephen M 19			
Current Term		Summer 2003 (only completed terms are evaluated)			
Description		BA Degree Plan			
Academic Year		2002-2003			
Active/Inactive		Active Plan			
 Winter 2001		 Fall 2001		 Winter 2002	
Planned	Taken	Planned	Taken	Planned	Taken
PHIL 103	PHIL 103	ENGL 3100	ENGL 3100	COMA 115	COMA 115
		MATH 1030	MATH 1030	FIN 301	FIN 301
		MATH 303	MATH 303	ART 2200	MGMT 3614
		MATH 304	MATH 304		
			MATH 335		
 Spring 2002					
Planned	Taken				
CMS 328	CMS 328				
CMS 330	CMS 330				
CS 3590	CS 3590				

Create Block

The Create Block button is used to generate a requirement block from the educational plan. This is most useful when the degree requirements are decided upon on a student-by-student basis as is the case in many graduate programs. It eliminates the need to build individualized blocks from within Scribe itself. The Create Block button will only appear when the user has the SDPLNREQ key assigned (and only when the Process New button is also present).

Clicking Create Block will save the plan and then generate an OTHER=PLAN (where "PLAN" is defined in CFG020 PLANNERBLOCK) requirement block with one rule for each class listed in the plan. In addition, the student's ID is added as a secondary tag to the OTHER=PLAN block so that many OTHER=PLAN blocks may exist. For an MBA degree, for example, you would create a DEGREE=MBA block in Scribe and then call in the OTHER=PLAN block:

```
1 Block (OTHER=PLAN)
  Label "Educational Plan requirements";
```

When a new audit is run the correct OTHER=PLAN block with the specific student ID as the secondary tag will be pulled into the audit.

Other notes:

If the plan is altered the user may simply click Create Block again to regenerate the block overwriting what was previously saved.

Any hyphenated items found in the plan (such as "-Math elective" or "-Language requirement") appear in the block as a RuleIncomplete rule as they are not real classes that can be taken. The catalog year saved on the plan is used as the start and stop catalog years saved on the block.

Once a block is created Scribe may be used to make alterations to it. If Create Block is used to regenerate the block after Scribe changes have been made the user will be asked if they really wish to overwrite the changes made in Scribe and the Create Block modifications would prevail.

Blocks created using this option have a block ID that begins with "RB" instead of "RA".

When using dapblockunload/dapblockload, these "RB" blocks are ignored. So if you are moving requirement blocks from one environment to another, these "RB" blocks are not considered.

Setup the UCX-CFG020 PLANNERBLOCK record

The screenshot shows the configuration page for the PLANNERBLOCK record. The header includes the record ID 'CFG020' and the table name 'PLANNERBLOCK'. Below the header is a toolbar with navigation and action icons. The main content area is titled 'Edit mode: PLANNERBLOCK' and contains an 'Instructions' section and a form with the following fields:

- Key: PLANNERBLOCK
- OTHER Block Title: (empty)
- OTHER Block Name: PLAN
- Subset Label Prefix: Classes planned for
- Create Subsets for Terms: Y
- Use Classes In Rules: N
- Show Credits in rule label: N

On the right side, there is a 'Record Details' panel showing:

- Revision: (empty)
- Who: Mgr, Degree Works
- Timestamp: 3/18/14 20:25:52

OTHER Block Title

This title is saved on the OTHER block on the dap-req-mst. If this setting is left blank the description from the plan is used as the block title.

OTHER Block Name

When the OTHER block is saved this is the value that is used. Normally this is set to PLAN or PLANNER or something simple. In Scribe you could then simply search for all OTHER=PLAN blocks created from the planner. Note, the student's ID is saved as a secondary tag on the block so Scribe should return many OTHER=PLAN blocks for all the students who had blocks created from their plan.

Subset Label Prefix

When the **Create Subsets for Terms** flag is Y this text is used as the prefix on the subset label. The term literal is added to the end of this text. For example, if this text is "Classes planned for" the resulting label will be "Classes planned for Spring 2009".

Create Subsets for Terms

When this flag is set to Y a subset is created for each term. When set to N, no subsets are created and each class in the plan will simply be created as a rule without grouping of course rules.

Use Classes in Rules

The course rules can be created as a class or as a credits rule. When this flag is N the credits from the planner for the class are used. For example, if the planner contains HIST 213 for 4 credits a rule like this will be created:

```
4 Credits in HIST 213
```

When the flag is Y a rule like this will be created

```
1 Class in HIST 213
```

Show Credits in rule label

The label for the course rules is simply the title of the course from the course-mst. However, when this flag is Y the credits for the class from the plan are appended to the end of the label. For example:

```
Label "History of Europe - 5 Units";
```

It is recommended that this flag to be set to Y when the **Use Classes in Rules** flag is set to Y; when the **Use Classes in Rules** flag is set to N, then the **Show Credits in rule label** should be set to N to prevent the required credits from appearing redundantly on the worksheet.

Example of Subset created using configuration options:

```
BeginSub
  3 Credits in PSYC 1100
    Label PSYC1100 "CRIT THINKNG PSYC - 3 Credits ";
  3 Credits in THEA 3650
    Label THEA3650 "CHILD DRAMA ACTIV - 3 Credits ";
  3 Credits in CHEM 3800
    Label CHEM3800 "ACHIEV WOMEN SCI - 3 Credits ";
RuleIncomplete
  Label "You need -LANGUAGE REQUIREMENT";
EndSub
Label 20032 "Classes planned for Spring 2003";
```

Plan Approval

If your institution requires that all educational plans be approved you should enable the UCX-CFG020 PLANNER Plans Need Approval flag.

When plan approval is enabled the active checkbox is disabled as is the locking checkbox – both are controlled by the approval status of the plan and show as labels in the header – as shown below. Below the header a message appears telling the user the current approval status of the plan:

- Plan needs approval
- Plan was submitted and is pending approval (plan is locked)
- Plan was rejected and needs approval
- Plan was approved

Important notes to understand plan approval:

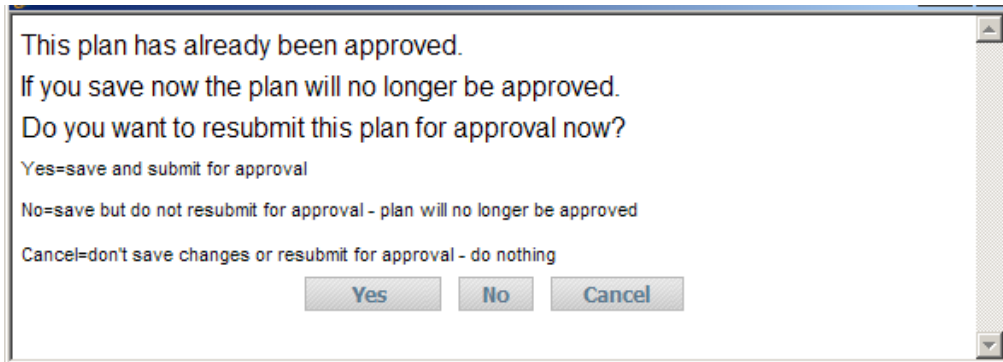
- Only when the plan is awaiting approval is the plan ever locked.
- The user may issue SaveAs on a locked plan awaiting approval.
- If a plan is approved the user may make changes but the plan must then be reapproved.
- Only once a plan is approved does it become active.
- When saving changes to a plan the user is given the option to submit for approval or to save but not submit
- If a plan is saved but not submitted or approval it will have the no-approval status.

The screenshot displays the 'Student Educational Planner' web interface. At the top, there are navigation tabs: Portal, FAQ, Help, Print, Exception Management, and Log Out. Below these are search and filter options for Student ID, Name, Degree, Major, Level, Classification, and Last Audit. The main interface is divided into several sections:

- Planner Worksheet:** Shows student information (Deans, Ruari Padraig), degree (B.S.), major (Math & Comp & Stat), level (U), classification (Sophomore), and last audit (03/16/2009). It also lists advisors (Deans, Raymond; Ho, Brett; McEnany, Chris) and overall GPA (3.000).
- Degree Progress:** Displays progress bars for Requirements (41%) and Credits (41%).
- Major in Mathematics:** Shows unmet conditions (40 Credits needed) and a banner test rule.
- Student Educational Planner:** Shows the current term (Winter 2003), description ('My great plan a'), academic year (2005-2006), last modified date (Thursday, March 19, 2009), and locking status (Plan is locked). A green message states: 'This plan has been approved. Changing the plan requires reapproval'.
- Class Selection:** A table for the Fall 2008 term showing selected classes: SOCI 201, B70T 00090, and ARTS 400, all with a count of 0. A notes field contains the text: 'I may also need to take a language class - but I am not sure which one.'

At the bottom, there are buttons for 'Save Plan', 'Reload Form', 'Save As...', 'Delete Plan', 'Process New', 'Check All Terms', and 'Uncheck All'.

A message similar to the following will be presented to the user depending on the current plan status when the user clicks the Save Plan button.



You can use the Degree Works web interface to approve/reject plans or if you are a Banner school you may use Banner Workflow to manage plan approvals. See the *Banner Considerations Technical Guide* for information on setting up Banner Workflow with Degree Works. You should not use both Banner Workflow and Degree Works to approve/reject plans as it would lead to much confusion.

To allow users to approve/reject plans they need the SDSEPAPP key. Having this key when plan approval has been enabled in UCX-CFG020 PLANNER allows the user to use the Management tab under the Planner tab to get a list of plans awaiting approval and approve/reject each plan. The user may also use the normal View option under the Planner tab to approve/reject the plan for the selected student in the same manner. The Management tab ignores the current student selected and searches for all plans for all students that are awaiting approval. The user may click the blue “APPROVE this plan” or the “REJECT this plan” text to manage the plan.

The screenshot shows the 'Student Educational Planner' interface. At the top, there are navigation tabs: Portal, FAQ, Help, Print, Exception Management, and Log Out. Below these are search filters for Student ID, Name, Degree, Major, Level, Classification, and Last Audit. The main navigation bar includes Worksheets, Planner, Notes, Petitions, Exceptions, GPA Calc, and Admin. The 'Planner' section is active, showing a dropdown for 'Deans, Ruari Pdraig: My great plan a' and radio buttons for 'Notes Mode' (selected) and 'Calendar Mode'. A 'View' button is present. Below this is a 'Management' tab, which is selected, showing a table of plan details:

Student Educational Planner		Print
Student	Deans, Ruari Pdraig	
Current Term	Winter 2003	
Description	My great plan a	
Academic Year	2005-2006	
Active/Inactive	Inactive Plan	
Locking Status	Plan is locked	
Approval Status	Pending Approval APPROVE this plan / REJECT this plan	
Last Modified	Thursday, March 19, 2009 by Manager, DW	

Below the plan details is a table for course credits:

▶ BAN WINTR2003	
Course	Credits
SOCI 201	0
B70T 00090	0
ARTS 400	0
	0
	0
	0
Total	0

To the right of the course table is a text box containing the note: "I may also need to take a language class - but I am not sure which one."

Templates

AKA – pre-defined plans

1. Access to the Templates tab is given by the SDTMP key.
2. SDTMP is part of the SRNREG group – registrar users get access by default
3. You may use SHPCFG to restrict access to this service as you wish.

Searching for Templates

1. School, Degree, Major, Minor, Concentration, College, Liberal Learning, Specialization, Program, and Catalog Year should help you narrow your search
2. You can also find Active, Inactive or both types of templates
3. If you know the ID of the specific template you may enter it also
4. Entering “12” in the ID field is sufficient, the value will change to T000012 automatically

The screenshot displays the Degree Works web interface. At the top, there are navigation tabs: Portal, FAQ, Help, Print, Exception Management, and Log Out. Below these is a search bar with fields for Student ID (****), Name (Gerrard, Stephen), Degree (B.A.), Major (Drama), Level (U), Classification, Last Audit (Today), and Last Refresh (08/08/2008 at 11:50). A row of buttons includes Worksheets, Planner, Notes, Petitions, Exceptions, GPA Calc, and Admin. The main content area is titled 'Planner' and 'Help your students Plan for Success'. A sidebar on the left has a 'Templates' link. The main area shows a 'Template Search' form with the following fields:

Level	All Levels
Degree	All Degrees
Major	All Majors
Major	All Minors
Concentration	All Concentrations
College	All Colleges
Liberal Learning	All Liberal Learnings
Specialization	All Specializations
Program	All Programs
Academic Year	All Academic Years
Show	Active and Inactive
Template Id	<input type="text"/> e.g. T0012345

A 'Search' button is located below the Template Id field.

Selecting a Template

Template list

- The template ID, active status and description for each of the templates found are shown
- An entry for Add new template allows the creation of a new template
- Templates appear in order by their descriptions

Mode options

- Notes mode – terms are listed top to bottom with notes for each term (see UCX-CFG020 PLANNER)
- Calendar mode – each “year” of terms is a row (see UCX-CFG020 PLANNER)

New Search...

- While editing a template you may want to initiate another search

The screenshot displays the Degree Works web interface. At the top, there are navigation tabs: Portal, FAQ, Help, Print, Exception Management, and Log Out. Below these are search and filter fields for Student ID, Name, Degree, Major, Level, Classification, Last Audit, and Last Refresh. A row of buttons includes Worksheets, Planner, Notes, Petitions, Exceptions, GPA Calc, and Admin. The 'Planner' section is active, showing a dropdown menu for 'Select a plan template to edit'. The dropdown list includes 'Add new template ----' and several active templates with their IDs and descriptions. To the right of the dropdown are radio buttons for 'Notes Mode' (selected) and 'Calendar Mode', along with 'Load' and 'New search...' buttons. Below the dropdown are several filter fields: College, Liberal Learning, Specialization, Program, Academic Year, Show, and Template Id. A 'Search' button is located at the bottom of the filter section.

Template ID	Active Status	Description
T0000002	Active	A Geography major with History minor
T0000019	Active	Accounting major
T0000024	Active	Accounting Major - Fall 2005
T0000031	Active	Accounting major 2008
T0000025	Active	Anthropology certificate
T0000009	Active	Art History
T0000022	Active	BA History 07/08
T0000003	Active	Biology major - Chem minor
T0000032	Active	Brett test new template fields

Editing a Template

1. Plan buttons appear below the template
2. Save Template – saves contents of template
3. Undo Changes – removes all modifications
4. Clear All – clears out all template information
5. Save As... - save the data as a new template
6. Delete – delete this current template – confirmation message appears
7. Description field is used to describe the template
8. The Active checkbox can be used to deactivate a template (put it on hold)
9. Catalog Year, School, Degree, Major, Minor, Concentration, College, Liberal Learning, Specialization, Program – used for searching and recording
10. Clicking Print in the top-right prints just the template frame

The screenshot shows the 'Student Educational Plan Template' editing interface. At the top, there are navigation tabs: Portal, FAQ, Help, Print, Exception Management, and Log Out. Below these are search and filter options for Student ID, Name, Degree, Major, Level, Classification, Last Audit, and Last Refresh. A 'Planner' section shows the current plan: 'T0000032 Active Plan for UG - BS Biochem majors'. The 'Templates' section displays the 'Student Educational Plan Template' with the following fields:

Description	Plan for UG - BS Biochem major	Academic Year	2009-2010	Active?	<input checked="" type="checkbox"/>
Level	Undergraduate School	Degree	BACHELOR OF SCIENCE (BS)	Major	Biochemistry
Minor		Concentration		College	
Liberal Learning		Specialization		Program	

Below the template fields, there are three sections for course planning:

- Fall 2008:** A table with columns for course ID and credits. Courses listed include -BIOL 123 (2), -CHEM 12343 (5.45), and MUSC 100 (3). A 'Notes' field contains the text: 'This needs to be approved by Dean Deans.'
- Fall 2009:** A table with columns for course ID and credits. Courses listed include -TEST 222 (4) and MATH 101 (4). A 'Notes' field is empty.
- Select Term:** A table with columns for course ID and credits. A 'Notes' field is empty.

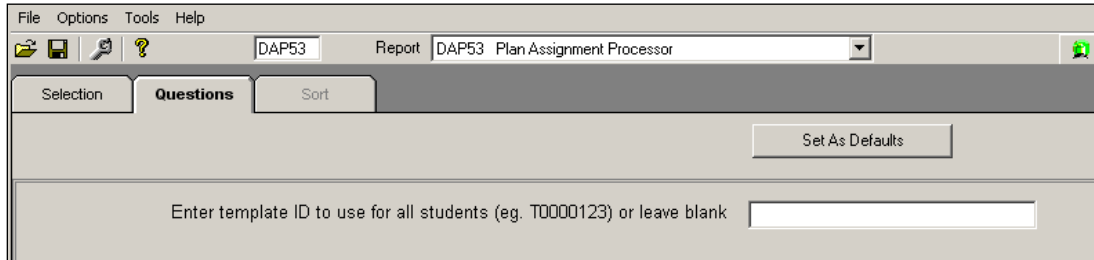
At the bottom of the interface, there are five buttons: Save Template, Undo Changes, Clear All, Save As..., and Delete.

Course Validation

See the *Course Validation* section under the Planner.

Batch Plan Assignment

You can assign plans in batch to students using DAP53 in Transit. You can specify the template that is to be used for all students in your pool or you may let the processor determine the best template for the student based on their catalog year, school, degree and major.



Here are the steps used to find an appropriate template for each student:

1. Try to find a template based on the student's **catalog year, school, degree and major**
2. If none found try to find a template based on the student's **catalog year, school, and degree** (blank major)
3. If none found try to find a template based on the student's **catalog year and school** (blank degree and major)
4. If none found try to find a template based on the student's **catalog year** (blank school, degree, and major)
5. If none found no plan will be created for the student

The DAP53 action file viewable in Transit gives a summary of how many plans were and were not created for your pool of students.

```
Plans created = 2
No plans created for students with pre-existing plans = 0
No plans created since no appropriate templates were found = 21
No plans created because of errors loading plans = 0
Total Students Processed = 23
```

View the DAP53 log file for more details.

The batch assignment processor does not attempt to assign a plan to a student if the student already has a plan recorded.

When building templates you should be sure to create one for every type of student – those that do not have a major on their degree record and perhaps those that don't even have a degree code recorded.

Look Ahead

Shown below is a Degree Works Student View Worksheet for Stephen Gerrard, a freshman majoring in accounting. As you can see, he is 0% complete with degree requirements. Working with his advisor, Stephen wants to plan a series of registrations assuring he is on course to graduate.

The screenshot displays the Degree Works Student View Worksheet for Stephen Gerrard. The top navigation bar includes Portal, FAQ, Help, Print, Exception Management, and Log Out. The main header shows search criteria: Student ID (****456), Name (Gerrard, Stephen), Degree (B.A.), Major (Banner Accounting), Level (U), Classification (Freshman), Last Audit (Today), and Last Refresh (Today at 4:36 p.m.). Below the header are tabs for Worksheets, Planner, Notes, Petitions, Exceptions, GPA Calc, and Admin. The Worksheets tab is active, showing a 'Student View' format with 'View' and 'Process New' buttons. The 'Look Ahead' section features two progress bars: 'Requirements 0%' and 'Units 0%'. Below these are two requirement sections:

Requirement Set	Academic Year	Units Required	Units Applied
<input checked="" type="checkbox"/> Bachelor of Arts Degree	2010-2011	186	0
186 Units needed Unmet conditions for this set of requirements: Minimum Units unsatisfied Minimum GPA unsatisfied 45 Units in residence needed			
<input type="checkbox"/> MAJOR REQUIREMENTS	Still Needed: See Major in Accounting section		
<input type="checkbox"/> Foreign Language Requirements	Still Needed: See Foreign Requirement section		
<input type="checkbox"/> Ed Plan Requirements	Still Needed: OTHER = PLAN block was not found but is required		
<input checked="" type="checkbox"/> Major in Accounting	2010-2011	63	0
63 Units needed Unmet conditions for this set of requirements: Minimum GPA unsatisfied			
<input type="checkbox"/> Principles of Accounting I	Still Needed: 3 Units in ACCT 1101		
<input type="checkbox"/> Principles of Accounting II	Still Needed: 3 Units in ACCT 1102		

Using the **Planner** tab, Stephen and his advisor lay out a series of recommended class registrations based on advice from the Student View worksheet shown on the previous page. As you can see below, his future schedules include four classes during the Fall of 2003, another three classes in the Spring of 2004, and one course in the Summer of 2004. Wanting to assure these registrations will keep him on track for graduation, Stephen and his advisor added check marks to each of the terms in question, and then clicked **Process New**, which runs a "Look Ahead" audit.

This audit will show exactly how each of the classes in Stephen's Planner will apply toward graduation requirements (assuming he completes them successfully). If a requirement or an entire set of requirements will be completed by any of the courses from Stephen's Planner or other

courses he may have in progress, a ~ (tilde) will appear in the check box associated with each fulfilled requirement.

The Planner can be saved at any point by clicking Save Plan.

Student Educational Planner		Print
Student	Gerrard, Stephen	
Current Term	Summer 2003	
Description	BA in Accounting	
Academic Year	2003-2004	
<input checked="" type="checkbox"/> Active Plan <input type="checkbox"/> Locked		
<input type="checkbox"/> Fall 2003	<input type="checkbox"/> Spring 2004	<input type="checkbox"/> Summer 2004
▶ ACCT 1101 3	▶ ACCT 1102 3	▶ MKTG 3405 3
CIS 1270 3	ECON 2302 3	
ECON 2301 3	ECON 3005 3	
WELS 100 4		
Total 13	Total 9	Total 3
<input type="checkbox"/> Select Term	<input type="checkbox"/> Select Term	<input type="checkbox"/> Select Term
▶	▶	▶

After clicking **Process New**, Degree Works displays the Look Ahead audit in the left panel of the Planner screen. As you can see, Stephen jumps from 0% complete to 37% complete when the projected classes from his Plan are applied against his requirements.

You can produce a printed copy of the Plan Ahead audit by clicking **Print** in the upper right of the screen.

The screenshot displays the 'Student Educational Planner' interface. At the top, navigation tabs include Portal, FAQ, Help, Print, Exception Management, and Log Out. Below these, a search bar shows 'Student ID: ****456' and 'Name: Gerrard, Stephen'. The 'Planner' tab is active, showing 'BA in Accounting' and 'Calendar Mode'. The 'Degree Progress' section indicates 37% requirements and 13% units completed. The 'Bachelor of Arts Degree' section shows 161 units needed and 20 units in residence needed. The 'Major in Accounting' section lists 42 units needed and a list of planned courses including ACCT 1101, ACCT 1102, CIS 1270, ECON 2301, ECON 2302, ECON 3005, and WELS 100. The 'Student Educational Planner' table on the right shows a schedule for Fall 2003, Spring 2004, and Summer 2004. The bottom of the interface contains buttons for 'Save Plan', 'Reload Form', 'Save As...', 'Delete Plan', 'Process New', 'Check All Terms', and 'Uncheck All'.

Stephen and his advisor can adjust his projected schedule using the **Planner** tab, running Look Ahead audits until the list of courses in his planner gets him to 100% of his degree requirements. At this point, he can save the resulting academic plan as part of his permanent advising record, knowing both he and his advisor (or others advisors he may see) can always use the Planner to modify or adjust his academic plan, with full confidence that projected changes will keep him on track for completion of his educational goals.

The Look Ahead audit can also be used in an ad hoc mode, allowing you to input as many courses as you desire. To do so, click the **Look Ahead** tab, which will display the data entry form shown below. On the left side of the screen, type the Discipline (e.g. ACCT) and Number (e.g. 1101) for each class you would like to use in a Look Ahead audit. Clicking **Add Class** updates the list of courses shown under the “Courses you are considering” label.

To remove a course, highlight it in the “Courses you are considering list” and click **Remove Course**.

When your projected course list is complete, select the version of the audit you want to see from the drop down menu under the Format label and click **Process New**.

Back to Self-Service	Portal	FAQ	Help	Print	Exception Management	Template Management	Log Out	
Find	Student ID	Name	Degree	Major	Level	Classification	Last Audit	Last Refresh
	****456	Gerrard, Stephen	B.A.	Banner Accounting	U	Freshman	Today	Today at 4:36
Worksheets	Planner	Plans	Notes	Petitions	Exceptions	GPA Calc	Admin	
Worksheets	Format:	Process New		<input checked="" type="checkbox"/> Include in-progress classes				
	Student View			<input checked="" type="checkbox"/> Include preregistered classes				
History	Look Ahead							
What If	To see an audit SHOWING COURSES FOR WHICH YOU PLAN TO REGISTER IN FUTURE TERMS , use the form below to enter the Subject code and Number of each anticipated course. Once you have created your list of courses, click on the Process New button.							
What If History	Enter a course and click Add Course			Courses you are considering				
	Subject	<input type="text"/>		ACCT 1101				
	Number	<input type="text"/>		ACCT 1102				
Look Ahead >	Add Course							
Financial Aid				Remove Course				
Aid History								

Shown below is a Look Ahead audit using the Student View report format. Note the drop down list showing all of the Look Ahead Courses Used in the audit. Because of screen shot limitations, it is not possible to display the entire audit, but this image shows the ACCT 1101 class from the list of Look Ahead Courses Used will meet the Principles of Accounting I rule (see the ~ (tilde) in the check box for this rule.

To return to the previous screen to enter a new list of courses, click **Back**.

The screenshot shows a student portal interface with the following elements:

- Navigation Bar:** Portal, FAQ, Help, Print, Exception Management, Log Out.
- Search Fields:** Find Student ID (****456), Name (Gerrard, Stephen), Degree (B.A.), Major (Banner Accounting), Level (U), Classification (Freshman), Last Audit (Today), Last Refresh (Today at 4:36 p.m.).
- Tools:** Worksheets, Planner, Notes, Petitions, Exceptions, GPA Calc, Admin.
- Left Sidebar:** Worksheets, History, What If, Look Ahead (selected), Financial Aid.
- Main Content:**
 - Look Ahead Courses Used:** A dropdown menu is open, showing ACCT 1101 and ACCT 1102.
 - Unmet conditions:**
 - MAJOR REQUIREMENTS: Still Needed: See Major in Accounting section
 - Foreign Language Requirements: Still Needed: See Foreign Requirement section
 - Ed Plan Requirements: Still Needed: OTHER = PLAN block was not found but is required
 - Major in Accounting:** Academic Year: 2010-2011, Units Required: 63, GPA: 0.000, Units Applied: 6
 - Unmet conditions for this set of requirements:** 57 Units needed, Minimum GPA unsatisfied.
 - Principles of Accounting I (ACCT 1101) Principles of Accounting I PL (3) Planned
 - Principles of Accounting II (ACCT 1102) Principles of Accounting II PL (3) Planned
 - Introduction to Computers: Still Needed: 3 Units in CIS 1270
 - Principles of Economics (Macro): Still Needed: 3 Units in ECON 2301
 - Principles of Economics (Micro): Still Needed: 3 Units in ECON 2302
 - Intermediate Macroeconomics: Still Needed: 3 Units in ECON 3005
 - Writing Strategies and Concepts: Still Needed: 4 Units in ENGL 1001
 - Writing Purposes and Research: Still Needed: 3 Units in ENGL 1002
 - Prof Writing in the Disciplines: Still Needed: 3 Units in ENGL 3100

Notes

The Notes utility allows Degree Works users to document academic advising on student records. These Notes can be marked as internal so that students will not see them – but most notes are made public and appear to all users. Notes made available to the student appear in audit reports in a Notes section at the bottom of the report. To access the Notes screen, click on the Notes tab. This will bring up the following Notes screen with **View Notes** already selected as shown below.

Internal	Note Text	Created By	Create Date
	Student was advised to register for the courses listed on the Planner.	User, Registrar	07-Jul-2011
<input checked="" type="checkbox"/>	Faculty advisor referred the student to the Financial Aid Office.	User, Registrar	07-Jul-2011
	This note is marked as 'Internal - not available to the student'	User, Registrar	07-Jul-2011

Four functions are available. These are View Notes, Add Notes, Modify Notes or Delete Notes. While anyone with access to Notes can view a Note, only the person who created the Note (or a Registrar Class user) can modify or delete a Note. All Notes are stamped with the date and name of the person who created or modified the Note. If a note was marked as Internal, an indicator next to the note will remind the user that this note should not be shared with the student.

To add a note, click the **Add Note** button.

This will bring up the Add New Note text box shown below. Enter the text of the note you wish to add. Notes can also be made unavailable to students by clicking the appropriate check box as shown below. You can hide the checkbox so that users cannot mark notes as internal by setting the UCX-CFG020 WEB “Show Notes Student Checkbox” flag to N. You may also define a set of pre-defined notes in UCX-CFG071. To enable this drop-down list on the notes page set the UCX-CFG020 WEB “Show Notes Picklist” flag to Y. Users with the SDNTECHG key can also enter additional text in the note field; those users who do not have this key are restricted to using the drop-down list of pre-defined notes.

When you are using UCX-CFG071 to define your list of predefined notes you must have a key of “000” as the first entry with text similar to “Please choose a predefined note”. Without this entry in place your users will never be able to choose the first note from your list.

You can also enter a note by clicking on the note icon next to the Last Audit date in the top-right corner of the screen. This graphic appears if you have the UCX-CFG020 WEB “Show Note Pop-up” flag set to Y (or a blank). This allows users to enter a note about the student regardless of the current tab displayed. Users can add a note while viewing a worksheet or while on the GPA calculator tab without having to jump back to the Notes tab.

The screenshot displays a web application interface for student management. At the top, there is a navigation bar with links: Back to Self-Service, Portal, FAQ, Help, Print, SureCode, Exception Management, and Log Out. Below this is a search and filter section with fields for Student ID (****), Name (Deans, Aoife), Degree (BA), Major (Mathematics), Level (UG), Classification (Junior), Campus (M), and Last Audit (12-Apr-2011). A note icon is visible next to the Last Audit date. A row of tabs includes Worksheets, Planner, Notes, Petitions, Exceptions, GPA Calc, and Admin. An 'Add a note' button is located in the top right corner.

The 'Add New Note' pop-up window is open, showing the following elements:

- Add New Note** (Section Header)
- Enter your note and click the Save Note button
- Not available to student
- Choose a predefined note from the list below (Dropdown menu)
- Save Note button
- Clear button

To modify an existing note, click the **Modify Notes** button.

This will bring up the modify notes window shown below.

Internal	Note Text	Created By	Create Date
<input type="checkbox"/>	Student was advised to register for the courses listed on the Planner.	User, Registrar	07-Jul-2011
<input checked="" type="checkbox"/>	Faculty advisor referred the student to the Financial Aid Office.	User, Registrar	07-Jul-2011
<input type="checkbox"/>	...ent's career plans.	User, Registrar	07-Jul-2011

You can only modify those notes created by yourself. Registrar-class users are able to modify or delete any note. Only those notes you are able to modify will appear in the Modify Notes window.

To modify a note, click in the text box for the note you wish to modify and enter your changes. You may use the checkbox next to the note to change the note from internal to public or from public to internal.

To save the modifications, click the note icon located to the left of the note. This will save the changes to the database.

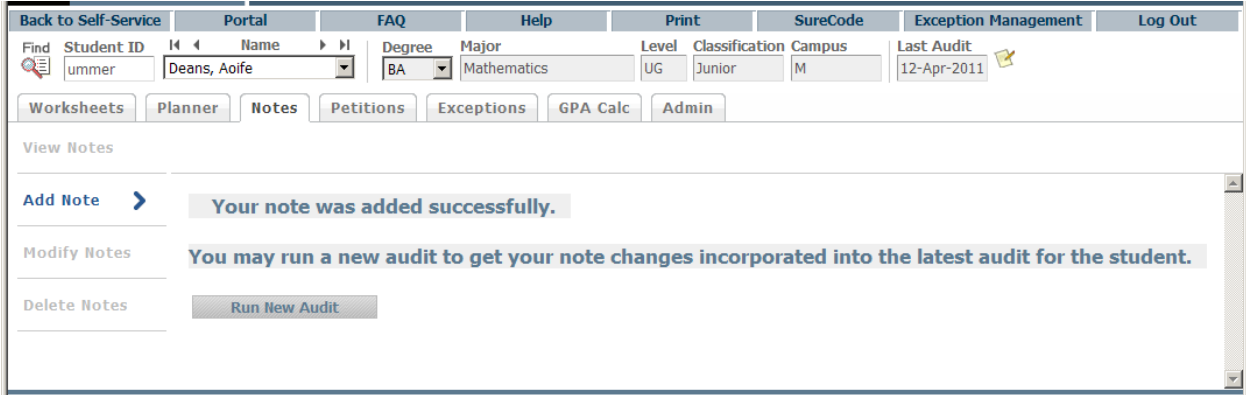
To delete a note, click the **Delete Notes** button to bring up the Delete Notes window. Delete the note by clicking on the notes icon located to the left of the note you wish to delete.

When making Notes unavailable to students as indicated above, it is very important to remember that Notes flagged as unavailable to a student will continue to show up on audit reports printed by non-student users such as advisors, faculty members or Registrars. Hence, if a student visits an advisor or faculty member and that person prints an audit report for that student, all Notes flagged as unavailable will be given to that student. The worksheets do show an indicator next to each note that is flagged as internal to help remind users however.

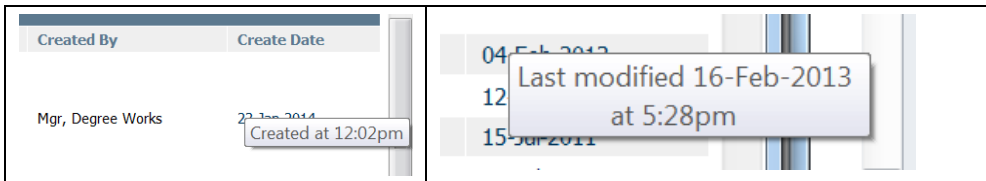
Any Notes available to be viewed will be listed in this section of the audit report. Notes saved with the Not available to student check box selected will not appear on audits viewed during student logons. These Notes will also not be printed on audit reports initiated by the student. They will appear on worksheets being viewed by advisors, faculty members, deans, or registrar users.

The creator of the note and the day the note was written appear to the right of the note. Worksheets will show as many notes as have been written and made available to the student.

Users who have been granted permission to do so can run a new audit after their note changes have been saved. In doing this, the note changes will appear on the worksheet the next time any user views the student's most recent audit. However, when users add a note using the note icon in the top-right corner users are not given this option to run a new audit. Users can go to the Worksheets tab to run a new audit as needed.



In the View Notes, Modify Notes and Delete Notes pages you can see additional information by placing your mouse cursor over the Create Date value for each note. If the note was not modified since it was first created the hover text will show the time when the note was created. If the note was modified the hover text will show the date and time the note was last modified. (Caveat: if the note was modified on the same date it was created the hover text will treat the time as the create time and not the modify time since the time really represents the time the note was last added or modified.)



Petitions

The Petitions tab allows users to enter requests for exceptions. A petition can be a request to have a particular requirement modified or waived for a particular student. To create a petition, first select the student for whom you wish to enter a petition and then click the Petitions tab. This will bring up the petition screen shown below.

The screenshot shows the Petitions screen for a student named Stephen Gerrard. The interface includes a navigation bar with tabs for Portal, FAQ, Help, Print, Exception Management, and Log Out. Below the navigation bar is a search area with fields for Student ID, Name, Degree, Major, Level, Classification, Last Audit, and Last Refresh. A sidebar on the left contains buttons for Worksheets, Planner, Notes, Petitions, Exceptions, GPA Calc, and Admin. The main content area displays a 'View Petitions' section with a table of petitions grouped by status: 'No Petitions Waiting Approval', 'Petitions Approved', 'Petitions Applied as Exceptions', and 'Petitions Rejected'. Each group contains a table with columns for Description, Created By, and Create Date.

Petitions Approved		
Description	Created By	Create Date
Stephen would like to change the computer requirement to a math requirement (MATH 2220) instead.	Manager, DegreeWorks Middle Second	09/25/2008

Petitions Applied as Exceptions		
Description	Created By	Create Date
Stephen spent a year in Berlin and should skip the foreign language requirement.	Manager, DegreeWorks Middle Second	09/25/2008

Petitions Rejected		
Description	Created By	Create Date
Stephen should be able to skip the introductory accounting course because his father is an accountant.	Manager, DegreeWorks Middle Second	09/25/2008

The petition screen shows all petitions that have been entered on the student's behalf. The View Petitions screen is shown by default whenever the petition tab is selected.

Petitions are grouped according to their status. Petitions can either be waiting for approval, approved, applied as exceptions or rejected. All new petitions have a default status of waiting for approval when first created. Once a petition is created, it can be acted upon by registrar-class users or users having access to the Exceptions Management button.

To create a new petition, click the Add Petition button. This will bring up a text box where you can enter the text for the petition.

The screenshot displays a web application interface with a top navigation bar containing 'Portal', 'FAQ', 'Help', 'Print', 'Exception Management', and 'Log Out'. Below this is a search and filter section with fields for 'Find Student ID' (containing '****'), 'Name' (containing 'Deans, Ruari Padraig'), 'Degree' (containing 'B.S.'), 'Major' (containing 'Math & Comp & Stat'), 'Level' (containing 'U'), 'Classification' (containing 'Sophomore'), and 'Last Audit' (containing '03/16/2009'). A row of buttons includes 'Worksheets', 'Planner', 'Notes', 'Petitions', 'Exceptions', 'GPA Calc', and 'Admin'. The 'Petitions' button is highlighted. On the left side, there is a sidebar with 'View Petitions', 'Add Petition >', 'Modify Petitions', and 'Delete Petitions'. The main content area is titled 'Add New Petition for Exception' and contains a text input field with the placeholder text 'Enter a description and click the Save Petition button'. Below the text field is a 'Submit Petition' button.

Once you have entered the text for the petition, click the Submit Petition button to save the petition to the database. A message will appear telling you your petition was added successfully. To add another petition, click the Add Petition button again and repeat the process.

To modify a petition, click the Modify Petition button.

A text window will open up for those petitions created by you. You will not be able to modify petitions created by others. To modify a petition, click in the text window and add or delete text. Click the Save button to the left of the petition to save your changes. When a new petition is saved, an e-mail notification message is generated and sent to the Registrar (or another institutional representative) notifying that there are new petitions awaiting approval. Please see the Degree Works Technical documentation for more information on how to configure this portion of the software.

To delete a petition, click the Delete Petition button.

Only petitions created by you can be deleted. Click the Delete button to the left of the petition to remove it from the database. Petitions that have been approved, applied as exceptions or rejected cannot be deleted. Only persons with registrar-class authority can delete petitions once they have been acted upon.

E-mail Notification - petsend

Degree Works can be configured to send a notification e-mail letting the e-mail recipient know that there are new petitions either waiting approval or approved petitions waiting to be applied as exceptions.

However, if you are a Banner school using Workflow to manage petitions you will not want to use this email notification as Workflow takes care of this for you.

The petsend Perl script is used to configure where the notification e-mail is to be sent. Below is an example on how to run petsend to send notification e-mails:

Example:

```
petsend someaddress@yourschool.edu WAITING
petsend someaddress@yourschool.edu APPROVED
```

The Reply To e-mail address is set to the same e-mail address as the Send To address by default as shown below:

```
$ReplyToEmailAddress = $ToEmailAddress;
```

To modify the Reply To e-mail address, change the \$ToEmailAddress in the petsend script to the e-mail address you wish replies to be sent to as shown below:

```
$ReplyToEmailAddress = "computer_center\@yourschool.edu";
```

You can also configure petsend to carbon copy (CC) one or more individuals at your institution.

To activate the CC function, modify the following line with the e-mail address of the person you wish to CC:

```
$CC = "someone_else\@yourschool.edu";
```

The petsend job can be configured not to send a notification e-mail if there are no petitions either waiting approval or waiting to be applied. To disable sending e-mails under these circumstances, change the value for SEND_ZERO_PETITIONS_MSG to "N" as shown below:

```
$SEND_ZERO_PETITIONS_MSG = "N";
```

You can edit the content of the notification e-mail by modifying the DefineSubjectAndBody function of the petsend script.

Exceptions

The Exceptions function allows those users having access to this function to modify the requirements for degree completion for a specific student.

To access the Exceptions function, click the Exceptions tab. This will open up the Exceptions screen shown below. The Exceptions tab may not be present on your screen depending upon your User Class level.

The screenshot shows the top navigation bar with tabs: Portal, FAQ, Help, Print, Exception Management, and Log Out. Below this is a search area with fields for Student ID (****456), Name (Gerrard, Stephen), Degree (B.A.), Major (Banner Accounting), Level (U), Classification (Freshman), Last Audit (Today), and Last Refresh (Today at 4:36 p.m.). A row of buttons includes Worksheets, Planner, Notes, Petitions, Exceptions (highlighted), GPA Calc, and Admin. Below the buttons, the 'Exceptions' section shows 'Exception Types' set to 'Force Complete' with a dropdown arrow, and buttons for 'Load', 'Remove Exception', and 'Run New Audit'.

Exceptions
Select the desired exception type from the picklist above then click Load

The Exceptions screen contains two parts. The upper part of the screen contains a drop-down list of the types of exceptions available to the user. Click the down arrow to open up the drop-down list and select the appropriate exception type.

This screenshot is similar to the previous one, but the 'Exception Types' dropdown menu is open, showing a list of options: Force Complete (highlighted), Substitute, Also Allow, Apply Here, and Remove Course and/or Change the Limit. The 'Load' button is visible to the right of the dropdown.

Exceptions
Select the desired exception type from the picklist above then click Load

Click the Load button to load the chosen exception type. A middle screen will appear with additional fields specific to the exception type chosen. The bottom part of the Exceptions screen shows an audit for the student showing all exceptions that have been entered and/or applied to the student audit.

Force Complete a rule or qualifier

Description

Add Exception

Bachelor of Arts Degree	
	186 Units needed
Unmet conditions for this set of requirements:	Minimum Units unsatisfied
	Minimum GPA unsatisfied
	45 Units in residence needed
	<input type="radio"/> 186 Units
	<input type="radio"/> MINCREDITS 186 in @ @
	<input type="radio"/> MINGPA 2
	<input type="radio"/> MAXPASSFAIL 60 Units
Block Qualifiers:	<input type="radio"/> MINRES 45 Units
	<input type="radio"/> MAXCREDITS 36 in @ @ (With DWLOCATION = EX)
	<input type="radio"/> MINCREDITS 45 in @ @ (With DWLOCATION = RE)
	<input type="radio"/> MAXCREDITS 36 in @ @ (With DWLOCATION = CE)
	<input type="radio"/> MINCREDITS 60 in @ 3@, 4@
	<input type="radio"/> MAXCREDITS 0 in @ 0@

Degree Works allows you to process the following types of exceptions:

Force Complete This exception completes a course rule, subset rule, block qualifier or rule qualifier without applying additional classes. It is the most powerful exception type available

Substitute This exception allows you to substitute one course for another
Also Allow This exception appends a course to a course list on a rule
Apply Here This exception allows the user to apply a specific course to a rule regardless of the Scribe text or the auditor best-fit algorithm. The auditor will not move courses applied to rules with this exception type unless a block or rule qualifier overrides the exception.

Remove Course / Change the Limit
This exception allows you to remove a class from a course rule or qualifier or to change the number of classes or credits required on a rule or qualifier.

Some exception types require more information than others. The bottom half of the screen shows an audit report for the student. The audit shows where each course has been applied and what remaining requirements are left outstanding. The radio buttons are used for selecting the rule on which to add the selected exception.

To Add a new exception, select the exception type you wish to add by selecting it from the Exception Type drop-down list.

The screenshot shows a web interface for 'Exception Management'. At the top, there are navigation tabs: 'Back to Self-Service', 'Portal', 'FAQ', 'Help', 'Print', 'Exception Management', 'Template Management', and 'Log Out'. Below these is a search bar with 'Student ID' (****) and 'Name' (Deans, Ruari Padraig). A filter section includes 'Degree' (BA), 'Major' (Mathematics), 'Level' (U), 'Classification' (Junior), 'Campus' (MA), 'Last Audit', and 'Last Refresh' (09-Feb-2012 at 1:38 pm). A menu bar contains 'Worksheets', 'Planner', 'Plans', 'Notes', 'Petitions', 'Exceptions', 'GPA Calc', and 'Admin'. The 'Exceptions' section is active, showing 'Exception Types' set to 'Substitute'. Buttons for 'Load', 'Remove Exception', and 'Run New Audit' are visible. The main form area is titled 'Substitute one class for another' and contains fields for 'Replace Subject' (ACCT), 'Number' (123), 'With Subject' (BUSN), and 'Number' (109). A 'With' dropdown is set to 'DW Age' and 'less than' with a value of '5'. A 'Description' field contains 'Replace ACCT 123 with BUSN 109' and an 'Add Exception' button is at the bottom right.

Select the course rule or qualifier where you wish to add the exception by clicking the correct radio button. Fill in the information required for each exception type. Each exception type will be discussed in greater detail below. Once the correct information has been entered, enter a description of the exception being added and click the Add Exception button to save the exception. If you do not enter a description, you will be prompted with a message that one will be entered for you describing the exception type you are using.

Exceptions are both student-specific and block-specific. In other words, an exception applies to a specific block used in a student degree audit. If an exception is processed in a major block for a student and that student then changes his/her major, the previous exception will no longer apply to the student's new major. However, if the UCX-CFG020 Apply Exception To The Same Block Type flag is set to Y then the exception can be used on the new major but only if the label-tag or qualifier tags between the two blocks match. Unused exceptions will appear at the bottom of the audit report in the Audit Errors section. Exceptions are also used with What-If audits. Exceptions will only appear in the exception screen and on audit reports configured to show Exceptions. By default, the Registrar's Audit report is configured to show exceptions. The text description entered with the exception will appear next to the exception on the audit report along with a time stamp indicating the name and date of the person who entered the exception.

Exceptions on rules are tied to the rule's label-tag, or label if no label-tag exists. When a block is modified using Scribe the exception is placed on the correct rule as long as the original rule label can be found in the new block. Qualifiers do not have labels so instead a Tag should be scribed for each header qualifier to prevent the exceptions from becoming unhooked.

See the *Label Tags* section of the *Scribe User Guide* for more information on using tags.

Force Complete

To process a Force complete exception select Force Complete from the Exception Types drop-down list and click the Load button.

Select the course rule or qualifier by clicking the radio button next to it in the degree audit.

Enter a description of why this exception is being processed and then click the Add Exception button located in the middle of the screen.

A text box will appear indicating that the exception was successfully saved to the database. If there was an error while trying to process an exception, an error message box will appear indicating the type of error encountered.

Shown below is an example of a Force Complete exception processed for the Philosophical Foundations of Sport & PE requirement.

Portal FAQ Help Print Exception Management Log Out

Find Student ID Name Degree Major Level Classification Last Audit Last Refresh

****456 Gerrard, Stephen B.A. Banner Accounting U Freshman Today Today at 4:36 p.m.

Worksheets Planner Notes Petitions Exceptions GPA Calc Admin

Exceptions Exception Types: Force Complete Load Remove Exception Run New Audit

Force Complete a rule or qualifier

Description: This requirement has been waived by the dean Add Exception

Unmet conditions for this set of requirements:

Minimum GPA unsatisfied

Block Qualifiers: 63 Units MINGPA 2

<input type="radio"/> Principles of Accounting I	<input type="checkbox"/> Still Needed:	3 Units in ACCT 1101
<input type="radio"/> Principles of Accounting II	<input type="checkbox"/> Still Needed:	3 Units in ACCT 1102
<input checked="" type="radio"/> Introduction to Computers	<input type="checkbox"/> Still Needed:	3 Units in CIS 1270
<input type="radio"/> Principles of Economics (Macro)	<input type="checkbox"/> Still Needed:	3 Units in ECON 2301
<input type="radio"/> Principles of Economics (Micro)	<input type="checkbox"/> Still Needed:	3 Units in ECON 2302
<input type="radio"/> Intermediate Macroeconomics	<input type="checkbox"/> Still Needed:	3 Units in ECON 3005
<input type="radio"/> Writing Strategies and Concepts	<input type="checkbox"/> Still Needed:	4 Units in ENGL 1001
<input type="radio"/> Writing Purposes and Research	<input type="checkbox"/> Still Needed:	3 Units in ENGL 1002
<input type="radio"/> Prof Writing in the Disciplines	<input type="checkbox"/> Still Needed:	3 Units in ENGL 3100
<input type="radio"/> Financial Management	<input type="checkbox"/> Still Needed:	3 Units in FIN 3000

The Force complete exception can be used on any course rule and most qualifiers. This exception type is completely independent of all student data. It will simply complete a rule on a student degree audit regardless of any qualifiers that might apply. Forcing a qualifier complete tells the auditor to ignore the qualifier the next time and audit is performed for this student.

Substitute

The Substitute exception is used to substitute one course for another. This is distinct from the Also Allow exception type in that one course is exchanged for another. To process a substitute exception, select the Substitute entry from the Exception Type drop-down list and click the Load button.

Select the rule or qualifier where you would like the exception to apply. Enter the target course from the course rule in the Replace fields. The target course must be found on the rule where the exception is to be placed in order to be saved to the database. Enter the substituted course in the With fields. The substituted course may also be selected by clicking on a course in the Electives area. This will automatically add the course to the With field.

You can further define the Also Allow exception using With qualifiers from the drop-down list. The values listed in the drop-down list are system defined With qualifiers (DW Credits, DW Grade, etc) as well as user defined With qualifiers in UCX-SCR044. When With qualifiers are included as a condition for this exception type, only those courses meeting the WITH qualifier criteria will be evaluated for the exception.

Enter a brief description of why the exception is being processed and click the Add Exception button.

The screenshot displays the 'Exception Management' section of a web interface. At the top, there are navigation tabs: 'Back to Self-Service', 'Portal', 'FAQ', 'Help', 'Print', 'Exception Management', 'Template Management', and 'Log Out'. Below these is a search bar with 'Find' and a magnifying glass icon, followed by fields for 'Student ID' (****), 'Name' (Deans, Ruari Padraig), 'Degree' (BA), 'Major' (Mathematics), 'Level' (U), 'Classification' (Junior), 'Campus' (MA), 'Last Audit' (Today), and 'Last Refresh' (09-Feb-2012 at 1:38 pm). A row of buttons includes 'Worksheets', 'Planner', 'Plans', 'Notes', 'Petitions', 'Exceptions', 'GPA Calc', and 'Admin'. The 'Exceptions' button is active, and a dropdown menu shows 'Exception Types' set to 'Substitute'. To the right are buttons for 'Load', 'Remove Exception', and 'Run New Audit'. The main area is titled 'Substitute one class for another' and contains the following fields: 'Replace Subject' (MATH), 'Number' (101), 'With Subject' (MATH), and 'Number' (107). Below these is a 'With' field with a dropdown set to 'DW Grade Letter', a comparison operator 'greater than', and a value 'C'. A 'Description' field contains the text 'Replace MATH 101 with MATH 107'. An 'Add Exception' button is located to the right of the description. At the bottom, a list of courses is shown with checkboxes and 'Still Needed' status:

Course	Status	Requirement
<input type="radio"/> Introduction to the Classics	Still Needed	1 Class in MUS F315 Grade > B
<input checked="" type="radio"/> Introduction to Math	Still Needed	1 Class in MATH 101* Grade > B
<input type="radio"/> Background in History	Still Needed	HIST 1916 (IP), HIST 1@ (T)
<input type="radio"/> Improvisational Theatre	Still Needed	1 Class in THEA @ ATTRIBUTE <> FY or A&B 1&2
<input type="radio"/> Improvisational Theatre II	Still Needed	1 Class in THEA @ ATTRIBUTE = FY
<input type="radio"/> Test of @ @ with Attribute=FY	Still Needed	1 Class in @ @ ATTRIBUTE = FY
<input type="radio"/> Sociology 1	Still Needed	1 Class in SOCI @ ATTRIBUTE <> ARTL
<input type="radio"/> Sociology 2	Still Needed	1 Class in SOCI @ ATTRIBUTE = ARTL
<input type="radio"/> Welsh Acting	Still Needed	6 Hours in WELS 200 or 300
<input type="radio"/> Composition	Still Needed	ENGL 1@ (T), ENGL 3001
<input type="radio"/> French Acting	Still Needed	1 to 3 Classes in FREN @

The substitute exception requires that one course be used in place of another. If the rule contains only a single course then the substituted course is required for completion of the block. If a substitute exception is processed on a rule with more than one course option that can be used to complete the rule, then the substituted course is not required and is an option available to the student. Only qualifiers that list courses support this type of exception.

When With data on the second line is specified and the course being replaced has a With qualifier specified, the new With data will replace the existing qualifier. When no With data appears on the second line and the course being replaced does have a With qualifier specified the qualifier remains in place untouched.

You can also create a global substitution exception by choosing the option at the top of the page.

These substitutions will be applied to all requirements found in all blocks.

GLOBAL EXCEPTION - applies to all requirements	
Global Exceptions:	<input type="radio"/> Substitution : Replace ACCT 111 with RORY 123
	<input type="radio"/> Substitution : Replace PHIL 147 with EVA 107
BA Liberal Studies Program - Liberal Arts Track	
	131 Credits needed
	Minimum GPA unsatisfied

Also Allow

The Also Allow exception modifies a course rule by appending a course to the course rule. This exception can be used when you wish to expand the course options available on a specific rule. Courses applied using the Also Allow exception are still subject to header qualifiers in the blocks in which they are used and are still subject to the best-fit algorithm. For example, if an Also Allow exception is processed allowing ENGL 215 to be used to satisfy a course rule and there is a block header or rule qualifier preventing the use of ENGL 215 within that block, the exception will be added to the database, but ENGL 215 will not be allowed to be used within that block. You will need to first modify the header qualifier preventing this course from being used before processing the Also Allow exception.

When processing an Also Allow exception to a group rule, the exception can only be processed on the individual rule labels inside the group rule, not the GROUP RULE HEADER LABEL.

To process an Also Allow exception, select the Also Allow entry from the Exception Type drop-down list. Select the course rule where you want the exception to apply. Enter the discipline and course number in the appropriate fields on the Also Allow exception and enter a brief description of why this exception is being processed. The course may also be selected by clicking on a course in the Electives area. This will automatically add the course to the course field for the exception type selected. Click the Add Exception button to complete the exception.

You may further define the Also Allow exception using With qualifiers from the drop-down list. The values listed in the drop-down list are system defined With qualifiers (DW Credits, DW Grade, etc) as well as user defined With qualifiers in UCX-SCR044. When With qualifiers are included as a condition for this exception type, only those courses meeting the WITH qualifier criteria will be evaluated for the exception.

Use each of the three With fields to identify your criteria.

The screenshot shows the 'Exceptions' page in the Degree Works system. At the top, there are navigation tabs: Portal, FAQ, Help, Print, Exception Management, and Log Out. Below these are search and filter fields for Student ID (****456), Name (Gerrard, Stephen), Degree (B.A.), Major (Banner Accounting), Level (U), Classification (Freshman), Last Audit (Today), and Last Refresh (Today at 4:36 p.m.).

The main navigation bar includes: Worksheets, Planner, Notes, Petitions, **Exceptions**, GPA Calc, and Admin. The 'Exceptions' section is active, showing 'Exception Types' set to 'Also Allow'. Buttons for 'Load', 'Remove Exception', and 'Run New Audit' are visible.

The 'Also Allow a class to meet a requirement' section contains:

- Allow Subject: ENGL
- Number: 200
- with: [dropdown]
- Description: Also allow 2000-level English courses on this rule
- Add Exception button

A list of courses is shown below, each with a radio button, a 'Still Needed' status, and the units and course number:

Course	Status	Units	Course Number
<input type="radio"/> Intermediate Macroeconomics	Still Needed	3	ECON 3005
<input checked="" type="radio"/> Writing Strategies and Concepts	Still Needed	4	ENGL 1001
<input type="radio"/> Writing Purposes and Research	Still Needed	3	ENGL 1002
<input type="radio"/> Prof Writing in the Disciplines	Still Needed	3	ENGL 3100
<input type="radio"/> Financial Management	Still Needed	3	FIN 3300
<input type="radio"/> Financial Institutions and Markets	Still Needed	3	FIN 3320
<input type="radio"/> Basic Concepts of Statistics	Still Needed	3	STAT 1000
<input type="radio"/> College Algebra	Still Needed	3	MATH 1030*
<input type="radio"/> Intro to Management OR Principles of Management	Still Needed	3	MGMT 1020 or 1102
<input type="radio"/> Business Law I	Still Needed	3	MGMT 2701
<input type="radio"/> Business Law II	Still Needed	3	MGMT 3110
<input type="radio"/> Organizational Behavior	Still Needed	3	MGMT 3614

The Also Allow exception does not require that the selected course be used on the modified rule.

The best-fit algorithm of the Audit Processor Engine will still function with this type of exception. Consequently, the allowed course may not be applied to rule bearing the exception if there is a better fit for this course elsewhere in the degree audit.

Note that one exception has already been processed for this student in the previous screen shot. This exception shows up as white band with blue text across the Exceptions page. In addition to the description, the name of the person who processed the exception and the date the exception was processed is also shown. If an exception has been processed but not used in the degree audit, it will show up in the Audit Errors section at the bottom of the screen labeled as Exceptions Not Used.

Block header exceptions do not support the Also Allow exception.

Apply Here

The *Apply Here* exception allows the user to apply a course to a rule even if the course is not listed as an option. This exception is very useful in correcting audits in cases where the user wishes to dictate specifically where courses are to be used within the degree audit. The *Apply Here* exception will apply a course to a rule regardless of any scribing, rule or block header qualifiers. For example, suppose a block contains a 'MAXPASSFAIL 0 CLASSES' header qualifier. You can use the *Apply Here* exception to apply a PASSFAIL class to a rule in this block without having to modify the block header qualifier. The *Apply Here* exception will also override an EXCEPT list on a rule. Courses applied to rules using this exception type will not be moved around within the audit. When processing an *Apply Here* exception on a group rule, the exception can only be processed on the individual rule labels inside the group rule. *Apply Here* exceptions cannot be processed on a Group Rule Header.

You can also use an *Apply Here* exception to place a failed or incomplete class on a requirement. This could be a problem wherein you place the exception when the class is still in-progress and it applies to the requirement just fine. However, if the student subsequently fails the class the exception is still enforced. If you do not want this to occur then you should add a WITH parameter on the exception, such as DW Grade Number, to ensure only passed or in-progress classes apply.

To process an *Apply Here* exception, select the *Apply Here* exception from the Exception Type drop-down list. Enter the course you want applied to a rule. The course selected must be a course already taken by the student and found on the degree audit or one the student is planning to take. The *Apply Here* exception cannot be used for courses that have not yet been taken. Once you have entered the course you want applied, select the rule to which the course should be applied. A message box will appear telling you the exception has been saved to the database.

You may further define the *Apply Here* exception using WITH qualifiers from the drop-down list. The values listed in the drop-down list are system defined WITH qualifiers (DW Credits, DW Grade, etc) as well as user defined WITH qualifiers in UCX-SCR044. When With qualifiers are included as a condition for this exception type, only those courses meeting the WITH qualifier criteria will be evaluated for the exception.

When placing an *Apply Here* exception any existing WITH data is removed so that a course that normally did not meet the WITH qualifiers will be able to fit on the rule. If the *Apply Here* exception contains a new WITH qualifier that will be applied – replacing the previous WITH data.

Use each of the three With fields to identify your criteria.

The screenshot displays the 'Exception Management' section of a student portal. At the top, navigation tabs include Portal, FAQ, Help, Print, Exception Management, and Log Out. A search bar shows Student ID ****456 and Name Gerrard, Stephen. The student's Degree is B.A., Major is Banner Accounting, Level is U, and Classification is Freshman. The Last Audit is Today, and the Last Refresh is Today at 4:36 p.m.

Below the search bar are tabs for Worksheets, Planner, Notes, Petitions, Exceptions, GPA Calc, and Admin. The 'Exceptions' tab is selected, showing 'Exception Types' set to 'Apply Here'. Buttons for 'Load', 'Remove Exception', and 'Run New Audit' are visible.

The main area is titled 'Apply Here a specific class'. It includes fields for 'Apply Subject' (BUS) and 'Number' (2449). There are three 'With' fields for criteria. A 'Description' field contains 'Apply BUS 2449 to this Bus Law rule' and an 'Add Exception' button.

A list of rules is shown below, each with a radio button, a checkbox, and a 'Still Needed' status with units and course numbers:

- Business Law I Still Needed: 3 Units in MGMT 2701
- Business Law II Still Needed: 3 Units in MGMT 3110
- Organizational Behavior Still Needed: 3 Units in MGMT 3614
- Production/Operations Mgmt Still Needed: 3 Units in MGMT 3620
- Senior Seminar in Management Still Needed: 3 Units in MGMT 6490
- Business Policy Still Needed: 3 Units in BUS 4500 or 4502
- Principles of Marketing Still Needed: 3 Units in MKTG 3405
- Foreign Requirement
- FOREIGN LANGUAGE REQUIREMENT Exception: Force Complete : Year in Berlin - skip FL requirement
- Multi-Cultural Studies Still Needed: Choose from 1 of the following:
- Spanish Culture
- Welsh Culture

To view the exception you placed on the student's record, click the Audit Tab, select the Detailed or Registrar's audit and process a new audit for this student. The exception will show up in blue text directly below the rule on which it was placed. If the exceptions are not showing up, be sure you have selected an audit report type that shows exceptions. Exceptions may not be viewable on all report types. Block header exceptions do not support the *Apply Here* exception.

Remove Course

The Remove Course Exception allows the user to remove a course from a course rule or qualifier or to change the limit on a course rule or qualifier. This exception type is very useful in modifying audit reports when students successfully petition to have a specific course or part of a specific requirement waived. This exception type is also useful in correcting the advice given to students when a specific course is disallowed on a specific rule by a student. For example, if a student receives advice that they can take CSC 113 to fulfill the Technology Requirement but the department chair has disallowed this course on this rule for a specific student, you can correct the advice given to the student by using the Remove Course exception.

To process a Remove Course exception, select the Remove Course and/or Change Limit entry from the Exception Type drop-down list. Select the rule or qualifier containing the course you want to remove. Enter the course discipline and number you wish to remove. Enter a brief description for the exception. If the exception also involves changing the limits on the rule or qualifier for the student, enter the new limit in the Change Limit to field on the exception. Click the Add Exception button to save the exception.

The screenshot displays the Banner system's Exception Management interface. At the top, there are navigation tabs: Portal, FAQ, Help, Print, Exception Management, and Log Out. Below these, a student profile is shown for Stephen Gerrard (Student ID ****456) with details for Degree (B.A.), Major (Banner Accounting), Level (U), Classification (Freshman), Last Audit (Today), and Last Refresh (Today at 4:36 p.m.). A menu bar includes Worksheets, Planner, Notes, Petitions, Exceptions, GPA Calc, and Admin. The 'Exceptions' section is active, showing 'Exception Types' set to 'Remove Course and/or Change the Limit'. Below this, the 'Remove Course and/or Change the Limit' form is visible, with 'Remove Subject' set to BUS 4502 and 'Change Limit to' set to an empty field. The description is 'Business policy requirement updated'. An 'Add Exception' button is present. A list of requirements is shown below, including 'Production/Operations Mgmt', 'Senior Seminar in Management', 'Business Policy', 'Principles of Marketing', 'Foreign Requirement', and 'FOREIGN LANGUAGE REQUIREMENT'. The 'Foreign Requirement' is currently checked with a green checkmark. The 'FOREIGN LANGUAGE REQUIREMENT' section includes options for 'Multi-Cultural Studies', 'Spanish Culture', 'Welsh Culture', 'Fench Culture', 'Beginnig French', and 'FREN 200 and FRE 306, 304 or 499'. The 'Exception:' field is set to 'Force Complete : Year in Berlin - skip FL requirement'.

In situations where a course is applied to a rule or qualifier as a result of a wildcard statement, using the Remove Course exception will remove ALL courses that have been applied as a result of the wildcard statement. For example, if HIST 330 and HIST 427 are both applied to the scribe rule **3 Classes in HIST @**, removing HIST @ using the Remove Course exception will remove both HIST 330 and HIST 427.

However, if you remove just HIST 330 the rule gets changed to **3 Classes in HIST @ Except HIST 330** – making sure that HIST 330 does not get applied to this requirement.

The Remove Course exception type can also be used to change the limit on a rule without removing a course from the course list. To change the limit on a rule without removing a course, select the rule where you wish to change the limit. Enter the new limit in the Change Limit to field. Click the Add Exception button to save the exception. Enter a brief description for the exception. The new limit will be applied to the rule during the next audit process.

Only qualifiers that list courses or specify a number of classes or credits support the Remove Course exception.

Qualifier Exceptions

The Force Complete, Substitute, Remove Course and Change Limit exceptions can be used on block header qualifiers and rule qualifiers. The header qualifiers appear above the rules in the block and have a radio button next to them.

Bachelor of Arts Degree

186 Units needed
 Unmet conditions for this set of requirements: Minimum Units unsatisfied
 45 Units in residence needed

Block Qualifiers:

- 186 Units
- MINCREDITS 186 in @ @
- MINGPA 2
- Exception: Force Complete : Waive 2.0 Minimum GPA Requirement**
- MAXPASSFAIL 60 Units
- MINRES 45 Units
- MAXCREDITS 36 in @ @ (With DWLOCATION = EX)
- MINCREDITS 45 in @ @ (With DWLOCATION = RE)
- MAXCREDITS 36 in @ @ (With DWLOCATION = CE)
- MINCREDITS 60 in @ 3@, 4@
- MAXCREDITS 0 in @ 0@

Rule qualifier exceptions also appear beneath the list of qualifiers.

Welsh Acting

Still Needed: 6 Hours in WELS 200 or 300

- MinCredits 1 in WELS 2@
- MinCredits 3 in WELS 3@

Exception: Remove Course / Change the Limit : Only 1 credit is needed at the 300 level now

Not all qualifiers support the same types of exceptions. Below are the exceptions and the qualifiers on which they can be placed:

Exception Type	Qualifiers Allowed
Force Complete	All except NonExclusive (aka ShareWith), SameDisc, and Optional
Substitute	MaxClasses, MinClasses, MaxCredits, MinCredits, MaxTerm, MinTerm, SpMaxCredit, SpMaxTerm
Remove Course	MaxClasses, MinClasses, MaxCredits, MinCredits, MaxTerm, MinTerm, SpMaxCredit, SpMaxTerm
Change Limit	All except SameDisc, Option, MinGPA, MinGrade

Exceptions Details

Other than the 50 character description, users can enter a longer textual explanation about the exception. Users may want to describe why the exception is being added or who approved it.

To enable this field, set the UCX-CFG020 Exceptions Details flag to “Y” or “R”. A value of “Y” displays the “Enter details” graphic, allowing the user to click it to enter the details. A value of “R” (required) is like “Y”, but it also ensures that the user enters details before saving. A value of “N” hides this feature.



Once the “Enter details” graphic is clicked, the user is presented with a window allowing longer text, up to 220 characters, to be entered.



On worksheets the details will appear as a pop-up hint over the description. The details will not, however, display when students are viewing the worksheets; the text will only appear to non-student users.



GPA Calculators

Overview

There are three different GPA calculators: Graduation, Term, and Advice Calculators. The calculators, in conjunction with current Degree Works functions, can help students in many ways:

- Realistic goal-setting at the beginning of the term or academic career
- Precise calculation of their end-of-term GPA using students' actual academic information
- Accurate mapping of students' paths for achieving honors, avoiding probation, or satisfying personal academic aspirations

Portal	FAQ	Help	Print	Exception Management	Log Out			
Find <input type="text" value="****456"/>	Name <input type="text" value="Gerrard, Stephen"/>	Degree <input type="text" value="B.A."/>	Major <input type="text" value="Banner Accounting"/>	Level <input type="text" value="U"/>	Classification <input type="text" value="Freshman"/>	Last Audit <input type="text" value="Today"/>	Last Refresh <input type="text" value="Today at 4:36 p.m."/>	
Worksheets	Planner	Notes	Petitions	Exceptions	GPA Calc	Admin		
Graduation Calculator >								
Term Calculator								
Advice Calculator								
Current GPA <input type="text" value="0.0"/>								
Units Remaining <input type="text"/>								
Units Required <input type="text"/>								
Desired GPA <input type="text"/>								
<input type="button" value="Calculate"/>								

Specifics

Graduation Calculator inputs

- Current GPA (provided from RAD-TERM-DTL: RAD-CUM-GPA)
- Credits Remaining
- Credits Required
- Desired GPA

This calculator takes the most "unknown" inputs. Many students may not know how many credits are required for their degree, nor the number of credits remaining. Its purpose, however, is to give the student a general view of what average GPA they will need to achieve over their final "X" credits in order to achieve their desired GPA. In some cases, this calculator will be useful to inform the student that their desired GPA is not possible to achieve (considering their number of credits remaining). In short, this calculator helps students to set long-term general goals.

Enter data into the vacant fields as below and click Calculate.

The screenshot shows a web interface for a graduation calculator. At the top, there is a navigation bar with links for Portal, FAQ, Help, Print, Exception Management, and Log Out. Below this is a search bar with fields for Student ID (****456), Name (Gerrard, Stephen), Degree (B.A.), Major (Banner Accounting), Level (U), Classification (Senior), Last Audit (Today), and Last Refresh (07/31/2008 at 5:42 p.m.). A row of buttons includes Worksheets, Planner, Notes, Petitions, Exceptions, GPA Calc, and Admin. The main content area is titled "Graduation Calculator" and contains a "Term Calculator" section with the following inputs and values:

Current GPA	2.973
Units Remaining	30
Units Required	100
Desired GPA	3.2

A "Calculate" button is located below the input fields.

The following screenshot shows you what average you will need to attain your desired results:

Student ID	Name	Degree	Major	Level	Classification	Last Audit	Last Refresh
****456	Gerrard, Stephen	B.A.	Banner Accounting	U	Senior	Today	07/31/2008 at 5:42 p.m

Current GPA	2.973
Units Remaining	30
Units Required	100
Desired GPA	3.2

You need to average a 3.730 over your final 30 Units to graduate with your desired GPA.

Recalculate

If you want to alter some of the entries, click Recalculate and the calculate screen will appear for you to make other entries. When you click Calculate, the revised information will appear.

Advice Calculator inputs

- Current GPA (provided from RAD-TERM-DTL: RAD-CUM-GPA),
- Credits Earned (provided from RAD-TERM-DTL: RAD-CUM-GR-ATT),
- Desired GPA

This calculator is perhaps the easiest to use. The student need only provide their desired GPA. It is used to figure out how a student can raise/lower their GPA using actual grades as advice. While it is fairly general, it is more specific than the graduation calculator. An important feature is that the grades are calculated using UCX-STU385. This table contains the Grade (letter value) as well as grade points for specific grades. So by manipulating UCX-STU385, you can determine how the advice is calculated.

However, the Graded Attempted flag in UCX-STU385 is also used to further filter out grades – only those grades with Graded Attempted = Y are used in the Advice Calculator – allowing you to exclude P grades for example.

Enter data into the vacant field as below and click Calculate.

Portal	FAQ	Help	Print	Exception Management	Log Out				
Find	Student ID	Name	Degree	Major	Level	Classification	Last Audit	Last Refresh	
	****456	Gerrard, Stephen	B.A.	Banner Accounting	U	Senior	Today	07/31/2008 at 5:42 p.m	
Worksheets	Planner	Notes	Petitions	Exceptions	GPA Calc	Admin			
Graduation Calculator <hr/> Term Calculator <hr/> Advice Calculator >									
					Current GPA	2.973			
					Units Earned	76			
					Desired GPA	3.2			
					Calculate				

The following shows you what average you will need to attain your desired results.

Portal	FAQ	Help	Print	Exception Management	Log Out				
Find	Student ID	Name	Degree	Major	Level	Classification	Last Audit	Last Refresh	
	****456	Gerrard, Stephen	B.A.	Banner Accounting	U	Senior	Today	07/31/2008 at 5:42 p.m	
Worksheets	Planner	Notes	Petitions	Exceptions	GPA Calc	Admin			
Graduation Calculator <hr/> Term Calculator <hr/> Advice Calculator >									
					Current GPA	2.973			
					Units Earned	76			
					Desired GPA	3.2			
					To achieve your desired GPA, you need one of the following:				
					15 Units at 4.300 (A+) grade average				
					21 Units at 4.000 (A) grade average				
					21 Units at 4.000 (A) grade average				
					34 Units at 3.700 (A-) grade average				
					34 Units at 3.700 (A-) grade average				
					Note: Results that would require you to take more than 150 Units have been omitted.				
					Recalculate				

If you want to alter some of the entries, click Recalculate and the advice screen will appear for you to make other entries. When you click Calculate, the revised information will appear.

Term Calculator inputs

- Current GPA (provided from RAD-TERM-DTL: RAD-CUM-GPA)
- Credits Earned (provided from RAD-TERM-DTL: RAD-CUM-GR-ATT)
- Class information (Credits per class, Grade per class from UCX-STU385)
- In-progress classes (provided from RAD-CLASS-DTL, where the In-Progress flag is "Y")

When done entering class information with expected credits and grades, click calculate. The following screen will produce the new calculated GPA.

This is the most specific calculator. If you want to change class or grade information, simply click Recalculate and the original screen will again be presented for you to make changes. When you click Calculate, the revised information will appear.

It can be used for goal-setting as well as mapping paths to avoid probation, achieve honors, etc. Again, this uses UCX-STU385 to select the grades that are specific to your institution. Other configurations include: the ability to control how many classes are available for input; the option to use drop-down list boxes (default) with values coming from UCX-STU385 for the GRADE field (ex: A- [3.700]), or simply text boxes for users to type in the grade value (ex: 3.4).

Enter data into the vacant fields as below and press Calculate. Note that the student's current classes and credits have been preloaded into the form.

Class	Units	Grade
E 3570	4.123	A [4.000]
D 3580	4.456	A-[3.700]
A 3590	4.789	B-[2.700]
X 3590	4.789	C+[2.300]
Class 5		A [4.000]
Class 6		A [4.000]
Class 7		A [4.000]
Class 8		A [4.000]

Note the use of the drop-down list box shown in Class 5.

The following screenshot shows you the results of your calculation.

Graduation Calculator

Term Calculator

Current GPA 2.973
Units Earned So Far 76

Advice Calculator

Class	Units	Grade	Grade
E 3570	4.123	A	4.000
D 3580	4.456	A-	3.700
A 3590	4.789	B-	2.700
X 3590	4.789	C+	2.300

Calculated GPA 3.004

By achieving the grades listed here, your GPA at the end of the term will be 3.004

Recalculate

If you want to alter some of the entries, click Recalculate and the Term Calculator screen will appear for you to make other entries. When you click Calculate, the revised information will appear.

Who Gets Access?

Like many Degree Works web functions, users need the appropriate keys to unlock these services. These are the new keys and services associated with them:

Keys	Associated Services
SDGPACLCGPA	Calculator Tab
SDGPAGRD	Graduation Calculator
SDGPATRM	Term Calculator
SDGPAADV	Advice Calculator

All these keys are included in the groups SRNREG, SRNADVX, SRNADV, SRNSTU.

What UCX Tables are Used?

UCX-STU385 (UCX-STU385 for RAD):
Flag grades that will be used in GPA calculations.

UCX-CFG020 WEB
Controls display of Term Calculator, allows you to specify how to display the GPA values, with 1, 2, or 3 decimals, as well as an option to round or truncate the GPA values.

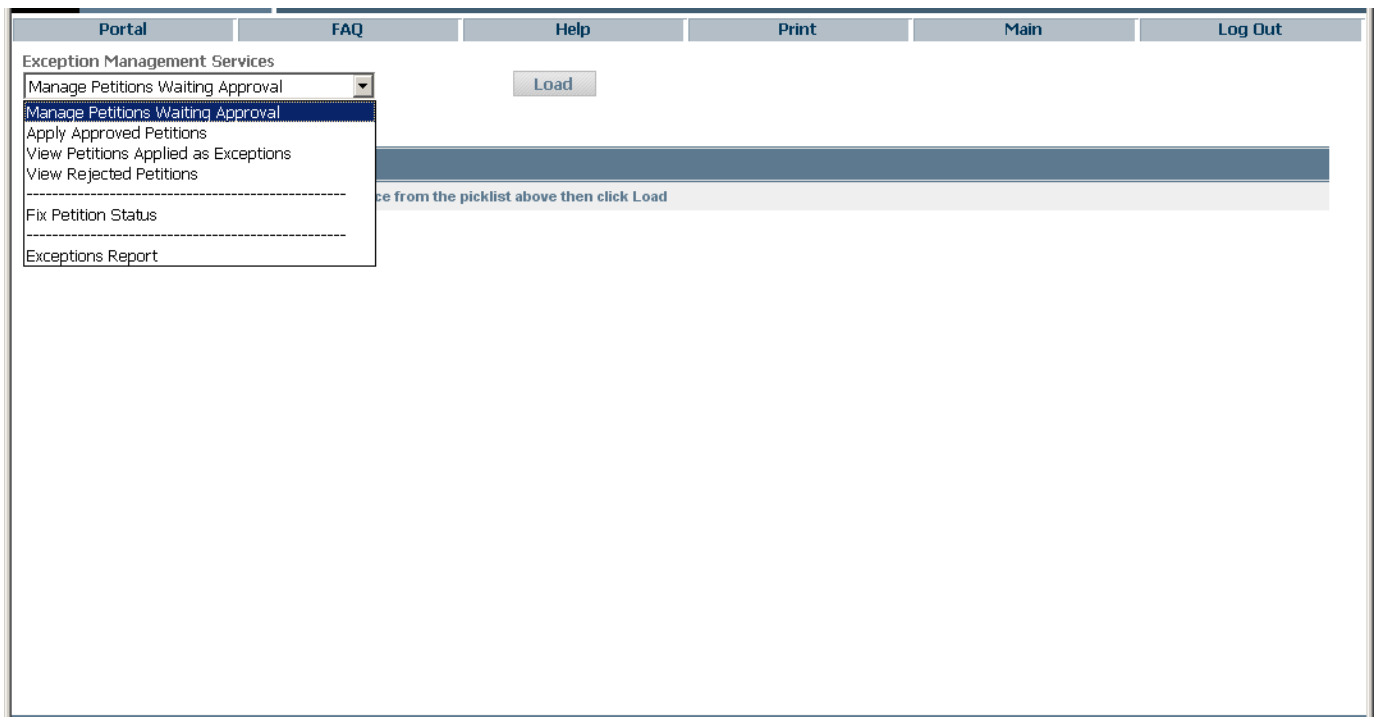
Exception Management

The Exception Management button allows users having access to this function to resolve petitions. Users can query the account to determine how many outstanding exceptions to be applied exist, how many petitions there are and what the statuses of these petitions and/or exceptions are.

However, if you are a Banner school using Workflow to approve/reject your petitions you should not allow your users to use the Manage Petitions Waiting Approval option as you do not want to be approving/rejecting petitions using two different tools. You can modify common/SHPCFG to remove the SDEMPEWA key for your users – though you may want to allow one or two admin people to use it in a special situation. Once your Workflow users have approved a petition this Exception Management tool should be used to apply the petition as an exception and view or fix as needed.

See the *Banner Considerations Technical Guide* for information on setting up Banner Workflow with Degree Works.

To begin managing exceptions, click the Exception Management button on the Degree Works Introduction page. A new page will open with a drop-down list of exception management services. This drop-down list contains six different services shown below. Each of these services will be explained in detail in the following sections.



The Manage Petitions Waiting Approval service is used to approve, reject or add additional documentation to pending petitions. Any petition with a pending status will appear on this list as shown in the screen shot below.

Portal FAQ Help Print Main Log Out

Exception Management Services
 Manage Petitions Waiting Approval

Petitions Waiting Approval							Refresh
Approve	Reject	Comments	Description	Id	Name	Advisor	Create Date
<input type="radio"/>	<input type="radio"/>		Jeffrey spent a year in Iraq and would like to petition to change his minimum credits to 100.	S001	Feist, Jeffrey	Manager, DegreeWorks Middle Second	09/25/2008
<input type="radio"/>	<input type="radio"/>		Stephen would like to waive the Major GPA requirement.	A123456	Gerrard, Stephen	Manager, DegreeWorks Middle Second	09/25/2008

To approve a petition, click the radio button in the Approve column and click the Save Changes button. The selected petition will be flagged as approved and will disappear from the list of petitions waiting approval. To reject a petition, click the radio button in the Reject column and click the Save Changes button. The selected petition will be flagged as rejected and will disappear from the list of petitions waiting approval. You can take action on a single petition or a group of petitions simultaneously from this screen.

It is also possible to add additional documentation to a pending petition while approving or rejecting a petition by using the Comments icon. Click the graphic in the Comments column to add additional documentation or comments to a pending petition. This will open up a Comments window where you can add additional comments or documentation to the pending petition as shown below.

The screenshot shows a web application interface for 'Exception Management Services'. At the top, there are navigation links: Portal, FAQ, Help, Print, Main, and Log Out. Below these is a dropdown menu for 'Manage Petitions Waiting Approval' and a 'Load' button. The main content area is titled 'Petitions Waiting Approval' and contains a table with columns for 'Approve', 'Reject', 'Comments', 'D...', 'Je...', and 'St...'. A modal dialog box titled 'Process Waiting Petition - Microsoft Internet Explorer' is open, showing a form for 'Process Petition Waiting Approval'. The form includes fields for 'Student' (Gerrard, Stephen), 'Advisor' (Manager, DegreeWorks Middle Second), 'ID' (A123456), and 'Create Date' (09/25/2008). The 'Request' field contains the text 'Stephen would like to waive the Major GPA requirement.' Below the request is a 'My comments' text area. At the bottom of the dialog are three buttons: 'Approve', 'Reject', and 'Cancel'.

Once the additional information has been entered, click the Approve or Reject button below the text window to complete the transaction. The petition will be saved with the appropriate status along with the additional documentation. It is important to remember that an approved petition is not the same as an applied exception. Once a petition has been approved, it is still necessary for someone to actually process the approved petition as an exception on the students' record.

To process petitions that have already been approved select the Apply Approved Petitions service from the Exception Management Services drop-down list. This will bring up a list of approved petitions as shown below. This screen shows the original petition request along with any additional information entered when the petition was approved. It also shows the student name and ID, the advisor and the date the petition was created. There is also a Refresh button on the right-hand side of the page that can be used to refresh this list of approved petitions.

Portal	FAQ	Help	Print	Main	Log Out
Exception Management Services					
Apply Approved Petitions		Load			
Approved Petitions					Refresh
Apply	Description	Id	Name	Advisor	Create Date
	This is line 1 of the text This is line 2 of the text	6789	Larusso, Daniel	Manager, DegreeWorks Middle Second	02/22/2007
	test	S009	Ludlow, Constantine M 20033	Manager, DegreeWorks Middle Second	02/06/2008
	A Petition	B003	Gerrard, Stephen M 19	Manager, DegreeWorks Middle Second	07/31/2008
	Jeffrey spent a year in Iraq and would like to petition to change his minimum credits to 100.	S001	Feist, Jeffrey	Manager, DegreeWorks Middle Second	09/25/2008
	Stephen would like to change the computer requirement to a math requirement (MATH 2220) instead.	A123456	Gerrard, Stephen	Manager, DegreeWorks Middle Second	09/25/2008

To process an exception for an approved petition, click the Apply icon located next to the petition in the Apply column. This will take you into the Exceptions screen where you can select the appropriate exception type and apply the exception. An example of the exception screen is shown on the next page. The student context area shows the student name and ID. The approved petition is also shown in the Exception Request field.

Student	Feist, Jeffrey	ID	S001	Update petition and close
Exception Request	Jeffrey spent a year in Iraq and would like to petition to change his minimum credits to 100.			
Exception Types	Remove Course and/or Change the Limit ▾	Load	Remove Exception	Run New Audit
Remove Course and/or Change the Limit				
Remove Subject	<input type="text"/>	Number	<input type="text"/>	
Change Limit to	<input type="text" value="100"/>	Hours	▾	
Description	<input type="text"/>			Add Exception
<input checked="" type="radio"/> GLOBAL EXCEPTION - applies to all requirements				
<input checked="" type="radio"/> BS - Management				
Unmet conditions for this set of requirements: 90 Hours needed				
<input type="radio"/> 120 Hours <input type="radio"/> SPMAXCREDITS 30 in @ @ <input type="radio"/> MINGPA 2.4 in ENGL 3100, 1001 <input type="radio"/> MINRES 15 Hours				
<input type="radio"/> GENERAL EDUCATION REQUIREMENTS <input type="checkbox"/> Still Needed: OTHER = GENEDSOC block was not found but is required				
<input type="radio"/> MAJOR REQUIREMENTS <input type="checkbox"/> Still Needed: MAJOR block was not found but is required				

Select the appropriate exception type from the Exception Type drop-down list and select the rule where you want to apply the exception in the degree audit shown below. Enter a description in the Description field and click the Add Exception button to process the exception. A message box will appear telling you that the exception has been successfully saved to the database. Click OK to process another exception. When you have finished entering all the exceptions for the current exception, click the Update Petition and Close button; do not click the red X. By clicking the button you will ensure that the petition's status gets updated to Applied correctly. (On some browsers, clicking the red X does not trigger the update-petition action.) Once the window is closed you will be taken back to the Apply Approved Petitions window. The approved petition(s) will now be marked as Applied.

Once a petition has been applied as an exception, the original petition will have a status of Applied. You can search for all petitions that have been applied as exceptions by selecting the View Petitions Applied as Exceptions item from the Exception Management Services drop-down list. Select the date range and click the Show Applied Petitions button. A list of all petitions applied within the selected date range will appear as shown below.

You can select a specific petition to delete by placing a check in the box next to the petition. You can select all petitions to delete by clicking the Check All button. To delete the selected petitions, click the Delete Selected Petitions button. Deleting the petition will have no effect on the corresponding exception that has already been applied. Some institutions may choose to save all petitions and not delete them once they have been applied. This is perfectly fine to do. It is not necessary to delete petitions once they have been applied as exceptions.

You can also view all petitions that have been rejected by choosing the View Rejected Petitions item from the Exception Management Services drop-down list. Select the date range and then click the Review Rejected Petitions button. This will bring up a list of rejected petitions as shown below.

Rejected petitions can be maintained in the database or deleted as necessary. To delete a rejected petition, select it by placing a check in the box next to it. Click the Delete Selected Petitions button to delete the selected petition. When you have finished managing exceptions, click the Audits button in the screen header to return to the Degree Works audit page or close the window to exit out of Degree Works.

To change the status of a petition, select the Fix Petition Status item from the Exception Management Services drop-down list. This will bring up the Fix Petitions Search page shown below. Select the date range and enter the ID of the student you want to search for. Click the Show Petitions button to process the search.

All petitions meeting the search criteria will be displayed as shown below. To change the status of a petition, select the correct status from the drop-down list in the Change column. Click the Save Changes button to save your changes to the database.

Change	Description	Id	Name	Advisor	Create Date
Applied	Stephen spent a year in Berlin and should skip the foreign language requirement.	A123456	Gerrard, Stephen	Manager, DegreeWorks Middle Second	09/25/2008
Rejected	Stephen should be able to skip the introductory accounting course because his father is an accountant.	A123456	Gerrard, Stephen	Manager, DegreeWorks Middle Second	09/25/2008
Approved	Jeffrey spent a year in Iraq and would like to petition to change his minimum credits to 100.	S001	Feist, Jeffrey	Manager, DegreeWorks Middle Second	09/25/2008
Waiting	Stephen would like to waive the Major GPA requirement.	A123456	Gerrard, Stephen	Manager, DegreeWorks Middle Second	09/25/2008
Approved	Stephen would like to change the computer requirement to a math requirement (MATH 2220) instead.	A123456	Gerrard, Stephen	Manager, DegreeWorks Middle Second	09/25/2008

If a petition has a status of Approved and additional comments were entered when the petition was approved, changing the petition status back to waiting will not affect the additional comments that were originally entered. These comments will display with the petition until the petition is either applied as an exception or deleted from the database.

If a petition has a status of Applied, changing the status of the petition will have no effect on the exception that has already been applied. One should therefore be careful when changing the status of petitions that have already been applied as exceptions as it is possible to apply more than one exception for a given petition.

Exception Reports

The Exceptions Report service allows users to query the database and create reports on the number and type of exceptions processed on your audits. You can search for exceptions created by an individual, exceptions applied for a particular student or exceptions applied within a specific block. You can also use this function to identify unhooked exceptions as well. To create an exception report, select the **Exceptions Report** item from the **Exception Management Services** drop-down list. This will bring up the *Exceptions Search* screen shown below.

The screenshot shows a web interface for 'Exception Management Services'. At the top, there are navigation tabs: Portal, FAQ, Help, Print, Main, and Log Out. Below these, a dropdown menu is set to 'Exceptions Report' with a 'Load' button next to it. The main section is titled 'Exceptions Search' and contains the following elements:

- Enter your search criteria**
- Show exception details
- Show requirement block counts
- Show exceptions created within: Last week (dropdown)
- Show exception type: Show all (dropdown)
- Show exceptions created by ID: [text input]
- Show exceptions on student ID: [text input]
- Show exceptions on requirement ID: [text input]
- Show unhooked exceptions only:
- Show unenforced exceptions only:
- [Show Exceptions Report button]

Select the date range to use by choosing a value from the **Show exceptions created within** drop-down list. You can view all exception types or select a specific exception type by choosing a value from the **Show exception type** drop-down list. To select all exceptions created by any user leave the Show exceptions created by ID field blank. To only see those exceptions created by a specific user, enter their ID in this field. You can also select exceptions created for a specific ID by entering the student ID in the **Show exceptions on student ID** field. To view exceptions placed within a given scribe block enter the block ID in the **Show exceptions on requirement ID** field.

To only view those exceptions that have become *unhooked*, place a check mark in the **Show unhooked exceptions** only checkbox.

To only view those exceptions that were *unenforced*, place a check mark in the **Show unenforced exceptions** only checkbox.

The search criteria used on the Exceptions Search screen can be used individually or in various combinations. It is not necessary to use all the search criteria elements when searching for exceptions. Not all combinations of select criteria will produce a valid report. For example, if you want to look for all exceptions in a specific block and you select a student ID that does not use that block, the query will not produce any results. Click the **Show Exceptions Report** button to process your query. Your search will be displayed in a list as shown on the next page.

The red arrow in the **Create Date** column indicates that the current report results are sorted in descending order by create date. The search results can be sorted by any of the columns displayed. Simply click the header label for the column you wish to use as your sort and the list will sort based upon that criterion. Sorts can be done in ascending or descending order. To change from descending to ascending, click the column header again and the indicator will change from a down arrow to an up arrow.

Exception Management Services
 Exceptions Report Load

Exceptions Found: 133

Create Date ▼	Creator	Requirement	Type / Value	Label Tag	Student	Type	Status	Description
11-Sep-2013	Manager, Degree Works	RA001196	CONC/ACCT	RULEC	1971	FC	OK	FC on MinGrade qual on Accounting II rule
06-Aug-2013	Vangolen, Jennifer	RA001558	MAJOR/ANTH		1991	RR	UN	JLV test
01-Aug-2013	Vangolen, Jennifer	RA001567	OTHER/JVCORE		1991	FC	UN	test
28-Jan-2013	Manager, Degree Works	RA001399	MAJOR/DRAM	MINRES	1971	NN	OK	Change to 23.7 Hours
28-Jan-2013	Manager, Degree Works	RA001399	MAJOR/DRAM		1971	NN	OK	Change to 32.7 Hours

The **OK** status code indicates that the exception applied correctly. The **UN** status code means that the exception became unhooked from its intended requirement during the reparse of the block; this usually is because the rule on which the exception was placed changed so much that new rule could not be recognized. To prevent this from happening you should ensure your rules have label tags and your qualifiers have qualifier tags. The other codes listed below indicate that the exception was **unenforced** meaning that when the audit was run the exception could not be applied as intended.

If you see no value in the **Label Tag** field for any exception you should strongly consider adding a label tag to that requirement. Please review the **Label Tags** section in the **Scribe User Guide** for help preventing unhooked exceptions.

Status code	Meaning
OK	Exception applied successfully
UN	Unhooked – typically caused by a Scribe block change (be sure to use label tags!)
BK	Block was not in audit – typically caused by a major or catalog year change
CR	Rule is not a course rule – node-ids are incorrect
CO	Course to be substituted was not found on the rule
IF	IF-statement was resolved – this rule was not used
ND	Node-id not found in block
PA	Rule is a plus-list and Also Allow is not allowed on a plus-list
PN	Rule is a plus-list and the course is not on the rule; the course can't be added to the end of the rule
R1	Not enforced but we don't know why exactly
R2	Not enforced and an unknown error code was found

You can also generate a report showing which scribe blocks have exceptions processed against them. This is a useful tool for determining if one or more scribe blocks are requiring an excessive number of exceptions. To produce an Exceptions Block Report, click the **Show requirement block counts** button on the Exceptions Search page prior to processing your query. An example of the Exceptions Block Report is shown below.

Requirement ID	Type	Value	Count
RA001334	OTHER	FOREIGN	2
RA001283	OTHER	GENEDSOC	2
RA001281	MAJOR	MGT	2
RA001342			1
RA001340	DEGREE	BA	1
RA001317	MAJOR	DRAM	1
RA001296	MAJOR	MGT	1
RA001295	ID	888666444	1
RA001280	DEGREE	BS-MGT	1
RA000520	CONC	INLL	1
RA000263	MAJOR	MATH	1
RA000236	DEGREE	BS	1

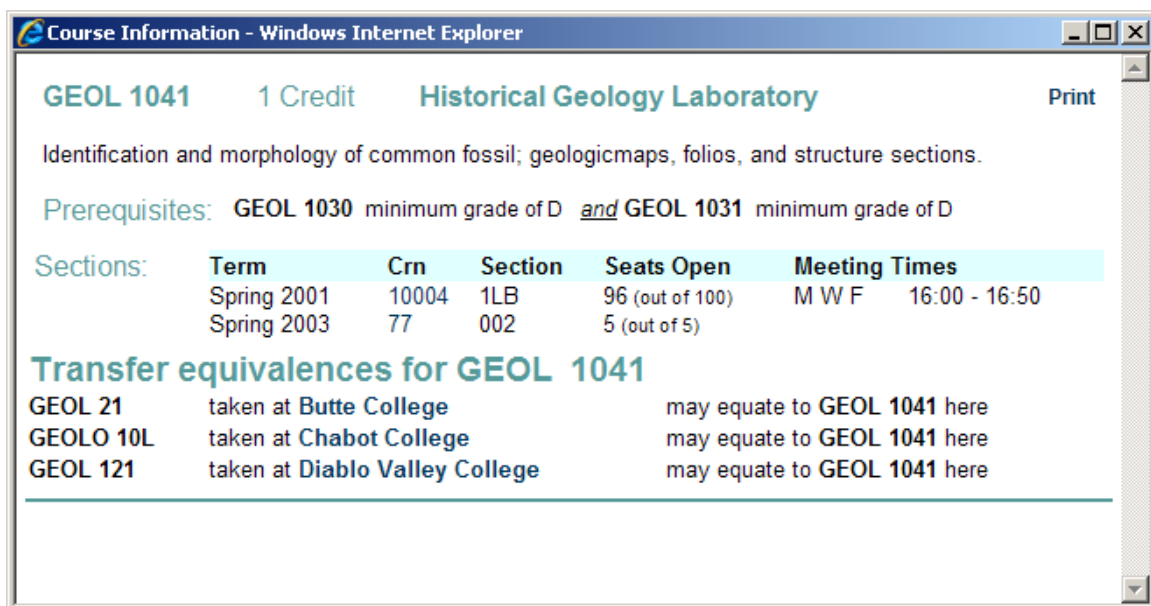
Course Link

Degree Works has the capability of allowing users to click on courses listed in the advice section to see a description of the course. The description may contain a listing of course content, prerequisites, instructors, course name changes, dual-listings, etc. If this feature is enabled, Degree Works audit reports can link to text information about courses shown in the advice section of audit reports.

To bring up information about courses listed as Still Needed, click on one of the courses listed.

Still Needed: 10 Credits in [ASTR 503](#) or [GEOL 1031](#) or [1041*](#) or [GERM 321](#)

A text window will open up displaying information about the course selected. In this case, GEOL 1041:



The screenshot shows a web browser window titled "Course Information - Windows Internet Explorer". The page displays the following information for GEOL 1041:

GEOL 1041 1 Credit **Historical Geology Laboratory** [Print](#)

Identification and morphology of common fossil; geologicmaps, folios, and structure sections.

Prerequisites: GEOL 1030 minimum grade of D *and* GEOL 1031 minimum grade of D

Sections:

Term	Crn	Section	Seats Open	Meeting Times
Spring 2001	10004	1LB	96 (out of 100)	M W F 16:00 - 16:50
Spring 2003	77	002	5 (out of 5)	

Transfer equivalences for GEOL 1041

GEOL 21	taken at Butte College	may equate to GEOL 1041 here
GEOL 10L	taken at Chabot College	may equate to GEOL 1041 here
GEOL 121	taken at Diablo Valley College	may equate to GEOL 1041 here

If the course key selected is non-specific (i.e. the course key contains a course range or wild card) or if the course has no listing in the course catalog, you will be taken to the top of the list returned. You can scroll through the list of courses using the scroll bars.







Prerequisites shown as part of the course catalog listing are not enforced within Degree Works although they may be enforced as part of the native student registration system. For more information about how to configure Course Link, see the *Special Topics* section in the *Degree Works Technical Guide*.

Worksheet Reports

Degree Works offers a number of different types of audit reports. Each audit report displays specific information about students and their progress towards degree completion. In the Audit Format drop-down list box, there are seven default audit reports available. These reports can be customized by the client to meet their respective needs. Additional audit reports can also be created and added to the drop-down list box. Not all of these audit reports are necessary. Reports can be added or removed from the drop-down list by your Degree Works administrator. Clients who are part of the Service Members Opportunity Colleges will also use the SOC Military Audit and SOC Civilian Audit. Many campuses choose to not make the Registrar's Audit report available to students. An example of each audit type is shown in the following pages.

Here is the Legend that appears at the end of every audit.

Legend

 Complete	 Complete except for classes in-progress	 Transfer Class
 Not Complete	 Nearly complete - see advisor	 Any course number

Asterisk for Prerequisites

When a requirement has not been met advice will appear in the worksheet. In the advice, an asterisk will appear next to each course that has a prerequisite. This is determined by the rad_course_mst course record. If "PREREQ" is in the dap_user_def1 field then the course should appear with an asterisk in the advice.

Class History Link

[Worksheets](#) | [Planner](#) | [Notes](#) | [Petitions](#) | [Exceptions](#) | [GPA Calc](#) | [Admin](#)

[Worksheets](#) > Format:
 Include **in-progress** classes
 Include **preregistered** classes
 [Class History](#)

This link is found on the upper right of each Worksheet screen, and will display classes in the following format:

Class History AA037032 as of 09/25/2008 at 16:31			
Student	Gerrard, Stephen	Level	Undergraduate School
ID	****456	College	
Advisor 1		Degree	BACHELOR OF ARTS
Advisor 2		Major	Banner Accounting
Overall GPA	2.973	Classification	Senior
Winter 2001			
PHIL	1001 Introduction to Logic	C	3
Fall 2001			
ENGL	3100 Poetry Writing	B	3
MATH	1030 College Algebra	A	3
Winter 2002			
COMM	1000 Public Speaking	C	3
FIN	3320 Financial Markets	A	3
MGMT	3614 Organizational Behavior	A	3
STAT	1000 Statistics	A	3
Spring 2002			
CS	3240 DATA STRUCT/ALGOR	C	4
CS	3560 INTR. SYSTEMS PROG	B	4

Diagnostics Report

Here are some views of what is in the Diagnostics Report Worksheet.

Diagnostics Report

Student 200017429
 Audit AA384wU1
 Date/Time 09/18/2015 at 08:11
 Degree Works Release 4.1.3
 Version dap14hnd.c#34 minus#26 [Feb6-package]
 Percent Done 74%
 Degree Works calculated GPA 2.54
 Student System GPA 2.540

Block Title	Complete	Block ID	Type = Value	GPA	Classes Applied	Credits Applied
<input type="checkbox"/> Degree in Associate of Science	74%	RA000358	DEGREE = AS	2.54	12	40
<input type="checkbox"/> General Education Requirements for AS Degree	66%	RA000374	OTHER = COREAS	3	4	12
<input type="checkbox"/> Associate of Science Science Requirements	98%	RA000179	OTHER = COREASS	2	2	8
<input checked="" type="checkbox"/> Associate of Science Math Requirements	100%	RA000178	OTHER = COREASM	2.5	1	3
<input type="checkbox"/> Associate of Science Math & Science						
<input type="checkbox"/> Major in Pre-Professional Nursing - UNMC						
<input type="checkbox"/> Electives for Associate of Science						

Block

RA000374: OTHER = COREAS

Spmaxcredits 3 in ENGL 1010 Qualifier original fits: ENGL 1010;

Spmaxcredits 3 in ENGL 1020 Qualifier original fits:

Spmaxcredits 3 in PSYC 1810 Qualifier original fits: PSYC 1810;

Spmaxcredits 3 in SOCI 1010 Qualifier original fits:

Spmaxcredits 3 in SPAN 1200 Qualifier original fits:

Spmaxcredits 3 in FREN 1200 Qualifier original fits:

Spmaxcredits 3 in ARTS @ Qualifier original fits:

Block Remarks English and Speech courses require a minimum grade of 'C'.

Course Written Communication - 100% Locations: 15-17 Classes applied: 1 Credits applied: 3 Tag=1

Applied: ENGL 1010 (3.0)

Requirement: 1 Class in ENGL 1010, ENGL 2070 MINGRADE 2.0 HighPriority HighPriority

Original Fits: ENGL 1010 Applied here

Course Oral Communication - 100% Locations: 21-24 Classes applied: 1 Credits applied: 3 Tag=2

Applied: SPCH 1010 (3.0)

Requirement: 1 Class in SPCH 1010, SPCH 1110, ENGL 2080 MINGRADE 2.0 HighPriority

Original Fits: SPCH 1010 Applied here

<p>Block</p> <p>RA000358: DEGREE = AS</p> <p>60 Credits</p> <p>Minres 15 credits</p> <p>MaxClasses 0 in @ 0200:0999 Qualifier original fits:</p> <p>MaxClasses 0 in ESLX @ Qualifier original fits:</p>	<p>2016 to 9999 GPA 3</p> <p>Classes applied: 4 Credits applied: 12</p>
--	---

<p>Course</p> <p><input checked="" type="checkbox"/> Social and Behavioral Science - 100%</p> <p>Applied: HIST 2010 (3.0)</p> <p>Requirement: 1 Class in ECON 2110, GEOG 1020, HIST --- (Hide) HighPriority</p> <p>Original Fits: HIST 2010 Applied here PSYC 1810 Reason removed: Too many classes: tieb; Compared to: HIST 2010 [ended up on RA000104 / Pre-Professional Nursing - UNMC Electives - 58.333332%]</p>	<p>Tag=8</p> <p>Locations: 65</p>
<p>Group</p> <p><input type="checkbox"/> HUMANITIES ELECTIVE - 0%</p> <p>Still Needed: 1 Group in</p> <p>Requirement: 1 Group in</p>	
<p>Course</p> <p><input type="checkbox"/> English/Literature - 0%</p> <p>Still Needed: 1 Classes in ENGL 1020*, 1520*, 2030*, 2040*, 2050*, 2060*, 2070*, 2100*, 2110*, THEA 1010*, ENGL 2140* (CrossListed with THEA 2140*), 2150*, 2160*, 2200*, 2210*, 2720*, 2730*, THEA 2140* (CrossListed with ENGL 2140*)</p> <p>Requirement: 1 Class in ENGL 1020, ENGL 1520, ENGL 2030, ENGL 2040, ENGL 2050, ENGL 2060, ENGL 2070, ENGL 2100, ENGL 2110, THEA 1010 [Formerly ENGL 2120], ENGL 2140 (CrossListed with THEA 2140), ENGL 2150, ENGL 2160, ENGL 2200, ENGL 2210, ENGL 2720, ENGL 2730, THEA 2140 (CrossListed with ENGL 2140), HUMS --- (Hide) MINGRADE 2.0</p> <p>Original Fits:</p>	<p>Locations: 66-87</p> <p>Classes applied: 0 Credits applied: 0</p> <p>Tag=5</p>
<p>Course</p> <p><input type="checkbox"/> Fine Arts and Language - 0%</p> <p>Still Needed: 1 Classes in ARTS 1050, 1060, MUSC 1550, SPAN 1200, FREN 1200</p> <p>Requirement: 1 Class in ARTS 1050, ARTS 1060, MUSC 1550, SPAN 1200, FREN 1200, ARTS --- (Hide)</p> <p>Original Fits:</p>	<p>Locations: 89-95</p> <p>Classes applied: 0 Credits applied: 0</p> <p>Tag=6</p>
<p>Course</p> <p><input type="checkbox"/> Social and Behavioral Science - 0%</p> <p>Still Needed: 1 Classes in ECON 2110, GEOG 1020, HIST 1030, 1040, 1050, 1060, 2010, 2020, POLS 1000, PSYC 1810, SOCI 1010</p> <p>Requirement: 1 Class in ECON 2110, GEOG 1020, HIST 1030, HIST 1040, HIST 1050, HIST 1060, HIST 2010, HIST 2020, POLS 1000, PSYC 1810, SOCI 1010, HIST --- (Hide)</p> <p>Original Fits: HIST 2010 Reason removed: Too many fits in this block [ended up on RA000374 / Social and Behavioral Science - 100%] PSYC 1810 Reason removed: Too many classes: tieb; Compared to: HIST 2010 [ended up on RA000104 / Pre-Professional Nursing - UNMC Electives - 58.333332%]</p>	<p>Locations: 96-108</p> <p>Classes applied: 0 Credits applied: 0</p> <p>Tag=7</p>

Class Information BIOS 2110, 2110, 2110, 2120, CHEM 1140, EDUC 2070, ENGL 1010, HIST 2010, INFO 1100, MATH 1150, 2030, PSYC 1810, 2200, SPCH 1010																					
Course	Grade	Credits	Id-num	Term	Force insuff	Force fallthru	In-progress	Incomplete	Passfail	Passed	Grade Pts	Numeric Grade	GPA Grade Pts	GPA Credits	Grade type	Repeat disc	Repeat num	Repeat policy	Rez inst		
BIOS 2110	C	4	0013	201520							8	2	8	4	S						
Attributes DWSISKEY=20444;																					
Header Fit	RA000104: MAJOR = PRNT				Spmaxcredit																
Header Fit	RA000179: OTHER = COREASS				Spmaxcredit																
Header Fit	RA000375: OTHER = COREASMS				Spmaxcredit																
Current fit	RA000104: MAJOR = PRNT				6: Pre-Professional Nursing - UNMC Electives - 58.333332%										Level: 1		Rank: 3,3,3,3,3,3,3,3,3				REDEMPTION-
Current fit	RA000179: OTHER = COREASS				44: Natural Science - 98%										Level: 15		Rank: 1,1,1,1,1,1,1,1,1				
Fit removed	RA000190: OTHER = ELECTIVEAS2				2: Additional Electives - 25%										Level: -9876		Rank: 4,-----				Lowest priority rule
Fit removed	RA000375: OTHER = COREASMS				65: Math and Natural Science - 98%										Level: 10		Rank: 2,2,2,2,2,2,2,2,2				Too many credits: 1 This was the
BIOS 2110	C	3	S013	201520							8	2	6	3	S						
BIOS 2110	C	1	S113	201520							8	2	2	1	S						
BIOS 2120	IP	4	0021	201610			YIP				0	0	0	0	S						
Attributes DWSISKEY=10344;																					
Header Fit	RA000104: MAJOR = PRNT				Spmaxcredit																
Header Fit	RA000179: OTHER = COREASS				Spmaxcredit																
Header Fit	RA000375: OTHER = COREASMS				Spmaxcredit																
Fit removed	RA000104: MAJOR = PRNT				7: Pre-Professional Nursing - UNMC Electives - 58.333332%										Level: 0		Rank: 3				Too many credits: 1 This was the
Fit removed	RA000179: OTHER = COREASS				44: Natural Science - 98%										Level: 14		Rank: 1				Too many credits: 1 This was the
Fit removed	RA000190: OTHER = ELECTIVEAS2				2: Additional Electives - 25%										Level: -9876		Rank: 4				Lowest priority rule
Current fit	RA000375: OTHER = COREASMS				65: Math and Natural Science - 98%										Level: 9		Rank: 2				REDEMPTION-FA

Financial Aid Report

Here is an example of a Financial Aid Report Worksheet.

Financial Aid Report FA000164 as of 15-Dec-2009 at 13:01

You are encouraged to use this financial aid audit report as a guide when determining your eligibility for your financial aid awards. A financial aid officer may be contacted for assistance in interpreting this report. Send an email to help@aid.generic.edu. This audit is not your official financial aid status and it is not official notification of financial aid awards. Please contact the Financial Aid Office for more information.

Student	Deans, Ruari Padraig	Classification	Sophomore
ID	1971	Degree	Bachelor of Science
Advisors	Deans, Raymond Ho, Brett McEnany, Chris	Majors	Mathematics English

Aid Term	Fall 2009	Aid Term Credits Attempted		Aid Term Credits Earned	
Aid Year	0910	Aid Year Credits Attempted		Aid Year Credits Earned	
Enrollment Status	Full Time	Total Credits Attempted	28	Total Credits Earned	28
Probation		Completed Residence Terms	1	Residence Credits Earned	16
Degree Credits Required	186	Total Grade Points	248.1	Cumulative GPA	3.00

Financial Aid Awards

- Pell Grant
- Stafford Loan

(CUIVY) PELL Grant

- Credits: At least 1 equated credit **Reason:** No Classes Registered
- Progress: Earned at least 66% of attempted **Reason:** You did not earn enough of your attempted

STAFFORD Award

- Minimum GPA of 3.5 in the Major required **Reason:** Your Major GPA is 3 but you need a 3.5
- Min GPA of 3.7 once 2 terms are completed **Reason:** You need a GPA of 3.7 now that you have 2 terms completed
- Minimum per term of 12 credits

Financial Aid audits are processed using the Aid tab. To access this screen, select the student you wish to process and click the Aid tab. This will automatically load the most recent Financial Aid audit for this student.

The student context information will be displayed in the fields at the top of the window once the student has been selected. This information includes current degree pursuit, major, school, student level and the date the last audit was processed. To process a new audit for the student select the Process New button. The *Include In-Progress classes* is disabled and checked while the *Include pre-registered classes* box is unchecked as we want the current classes but do not want future classes for a financial aid audit.

The Aid Term drop-down list is populated from UCX-STU016 for all terms that have their Financial Aid Year field populated; if you blank out this field in the UCX you can remove the term from this list. The Aid Term is used to give aid audits context when dealing with calculations of credits attempted and earned for a term or aid year; see the list of reserved words that make use of these values.

The Aid Term is looked up in UCX-STU016 to figure out the aid year. Because earned credits are not known until after the end of a term (or aid year) aid audits need to be run for a term after it has been completed and grades have been processed.

If you run an audit specifying an aid term, and thus aid year, for an aid year that is not found on rad_aid_dtl for the student a message will appear in the report listing the aid years that are valid for the student.

If you have the Historic Report listing showing you may select an older audit and click View to review it. At any time you may also click Process New to obtain a new audit. Once the audit has been processed, the audit report will be displayed in the format selected prior to processing. As mentioned earlier, the audit information displayed depends upon the UCX-RPT036 configuration settings for the audit report format selected.

Depending on your access, the Format drop-down list may also display the “Aid and Academic Report”. You may use this report to examine the academic degree audit information alongside the financial aid audit results.

Graduation Checklist

Here is an example of a Graduation Checklist Worksheet.

The screenshot shows a web interface for a Graduation Checklist Worksheet. At the top, there is a navigation bar with links: Portal, FAQ, Help, Print, Exception Management, and Log Out. Below this is a search area with fields for Student ID (****456), Name (Gerrard, Stephen), Degree (B.A.), Major (Banner Accounting), Level (U), Classification (Senior), Last Audit (Today), and Last Refresh (07/31/2008 at 5:42 p.m.).

Below the search area is a 'Worksheets' section with tabs: Planner, Notes, Petitions, Exceptions, GPA Calc, and Admin. The 'Worksheets' tab is active, showing a list of worksheets. The selected worksheet is 'Graduation Checklist' (AA037032 as of 09/25/2008 at 16:31). There are buttons for 'View' and 'Process New', and checkboxes for 'Include in-progress classes' and 'Include preregistered classes'. A 'Class History' link is also present.

The main content area displays a 'History' section for the selected worksheet. It shows a table with columns: Student, Name, Level, College, Advisor 1, Advisor 2, Degree, Major, Overall GPA, and Classification. The student is Gerrard, Stephen, with ID ****456, Undergraduate School, Advisor 1 and 2, BACHELOR OF ARTS, Banner Accounting, and Overall GPA 2.973.

Below the table, there are sections for requirements:

- Bachelor of Arts Degree: Academic Year: 2010-2011, Units Required: 186, GPA: 2.100, Units Applied: 42,368
- MAJOR REQUIREMENTS
- Foreign Language Requirements
- Ed Plan Requirements
- Blocks included in this block: Major in Accounting, Foreign Requirement, Go Reds
- Major in Accounting: Academic Year: 2010-2011, Units Required: 63, GPA: 3.800, Units Applied: 15
- Principles of Accounting I
- Principles of Accounting II
- Introduction to Computers: CIS 1270 (IP) (T)
- Principles of Economics (Macro): ECON 2301 (IP) (T)
- Principles of Economics (Micro): ECON 2302 (IP) (T)
- Intermediate Macroeconomics
- Writing Strategies and Concepts: ENGL 1001 (IP) (T)

Registrar Report

Here is an example of a Registrar Report Worksheet.

Portal	FAQ	Help	Print	Exception Management	Log Out
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Find	Student ID	Name	Degree	Major	Level	Classification	Last Audit	Last Refresh
	****456	Gerrard, Stephen	B.A.	Banner Accounting	U	Senior	Today	07/31/2008 at 5:42 p.m

Worksheets	Planner	Notes	Petitions	Exceptions	GPA Calc	Admin
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Worksheets	Format:	Registrar Report	View	Process New	<input checked="" type="checkbox"/> Include in-progress classes <input checked="" type="checkbox"/> Include preregistered classes	Class History
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History	Registrar Report AA037032 as of 09/25/2008 at 16:31				
What If	Student	Gerrard, Stephen	Level	Undergraduate School	
	ID	****456	College		
Look Ahead	Advisor 1		Degree	BACHELOR OF ARTS	
	Advisor 2		Major	Banner Accounting	
Financial Aid	Overall GPA	2.973	Classification	Senior	

Degree Progress

Requirements	21%	
Units	23%	

<input type="checkbox"/> Bachelor of Arts Degree	Academic Year:	2010-2011	Units Required:	186
	GPA:	2.100	Units Applied:	42,368

143,632 Units needed
 Unmet conditions for this set of requirements: Minimum Units unsatisfied
 2,632 Units in residence needed

Block Qualifiers:

- 186 Units
- MINCREDITS 186 in @ @
- MINGPA 2
- MAXPASSFAIL 60 Units
- MINRES 45 Units
- MAXCREDITS 36 in @ @ (With DWLOCATION = EX)
- MINCREDITS 45 in @ @ (With DWLOCATION = RE)
- MAXCREDITS 36 in @ @ (With DWLOCATION = CE)
- MINCREDITS 60 in @ 3@, 4@
- MAXCREDITS 0 in @ 0@

<input type="checkbox"/> MAJOR REQUIREMENTS	Requirement:	1 Blocktype (MAJOR)	Still Needed:	See Major in Accounting section
<input type="checkbox"/> Foreign Language Requirements	Requirement:	1 Block (OTHER = FOREIGN)	Still Needed:	See Foreign Requirement section
<input type="checkbox"/> Ed Plan Requirements	Requirement:	1 Block (OTHER = PLAN)	Still Needed:	See Go Reds section

Portal	FAQ	Help	Print	Exception Management	Log Out			
Find Student ID	Name	Degree	Major	Level	Classification	Last Audit	Last Refresh	
****456	Gerrard, Stephen	B.A.	Banner Accounting	U	Senior	Today	07/31/2008 at 5:42 p.m	
Worksheets	Planner	Notes	Petitions	Exceptions	GPA Calc	Admin		
Worksheets	Format: Registrar Report	View		Process New	<input checked="" type="checkbox"/> Include in-progress classes <input checked="" type="checkbox"/> Include preregistered classes		Class History	
History	Blocks included in this block Major in Accounting Foreign Requirement Go Reds							
What If	<input checked="" type="checkbox"/> Major in Accounting Academic Year: 2010-2011 Units Required: 63 GPA: 3.800 Units Applied: 15							
Look Ahead	Unmet conditions for this set of requirements: 48 Units needed							
Financial Aid	Block Qualifiers: 63 Units MINGPA 2							
	<input type="checkbox"/> Principles of Accounting I	Requirement: 3 Credits in ACCT 1101 (WITH DWGRADE>=B,)		Still Needed: 3 Units in ACCT 1101 Grade >= B				
	<input type="checkbox"/> Principles of Accounting II	Requirement: 3 Credits in ACCT 1102		Still Needed: 3 Units in ACCT 1102				
	<input type="checkbox"/> Introduction to Computers	Requirement: 3 Credits in CIS 1270		CIS 1270 PC Fundamentals Satisfied by CS 101 - Napier University		B	(0)	Summer 2003
	<input type="checkbox"/> Principles of Economics (Macro)	Requirement: 3 Credits in ECON 2301		ECON 2301 Principles of Macroeconomics Satisfied by EC 101 - Napier University		B	(0)	Summer 2003
	<input type="checkbox"/> Principles of Economics (Micro)	Requirement: 3 Credits in ECON 2302		ECON 2302 Principles of Microeconomics Satisfied by EC 102 - Napier University		B	(0)	Winter 2004
	<input type="checkbox"/> Intermediate Macroeconomics	Requirement: 3 Credits in ECON 3005		Still Needed: 3 Units in ECON 3005				
	<input type="checkbox"/> Writing Strategies and Concepts	Requirement: 4 Credits in ENGL 1001		ENGL 1001 Expository Writing I Satisfied by EN 105 - Napier University		A	(0)	Fall 2003
	<input type="checkbox"/> Writing Purposes and Research	Requirement: 3 Credits in ENGL 1002		Still Needed: 3 Units in ENGL 1002				

Portal	FAQ	Help	Print	Exception Management	Log Out			
Find Student ID	Name	Degree	Major	Level	Classification	Last Audit	Last Refresh	
****456	Gerrard, Stephen	B.A.	Banner Accounting	U	Senior	Today	07/31/2008 at 5:42 p.m	
Worksheets	Planner	Notes	Petitions	Exceptions	GPA Calc	Admin		
Worksheets	Format: Registrar Report	View	Process New	<input checked="" type="checkbox"/> Include in-progress classes	<input checked="" type="checkbox"/> Include preregistered classes	Class History		
History	<input checked="" type="checkbox"/> Prof Writing in the Disciplines	Requirement: ENGL 3100	Poetry Writing	B	3	Fall 2001		
What If	<input type="checkbox"/> Financial Management	Requirement: Still Needed: 3 Units in FIN 3300						
Look Ahead	<input checked="" type="checkbox"/> Financial Institutions and Markets	Requirement: FIN 3320	Financial Markets	A	3	Winter 2002		
Financial Aid	<input checked="" type="checkbox"/> Basic Concepts of Statistics	Requirement: STAT 1000	Statistics	A	3	Winter 2002		
	<input checked="" type="checkbox"/> College Algebra	Requirement: MATH 1030	College Algebra	A	3	Fall 2001		
	<input type="checkbox"/> Intro to Management OR Principles of Management	Requirement: Still Needed: 3 Units in MGMT 1020 or 1102						
	<input type="checkbox"/> Business Law I	Requirement: Still Needed: 3 Units in MGMT 2701						
	<input type="checkbox"/> Business Law II	Requirement: Still Needed: 3 Units in MGMT 3110						
	<input checked="" type="checkbox"/> Organizational Behavior	Requirement: MGMT 3614	Organizational Behavior	A	3	Winter 2002		
	<input type="checkbox"/> Production/Operations Mgmt	Requirement: Still Needed: 3 Units in MGMT 3620						
	<input type="checkbox"/> Senior Seminar in Management	Requirement: Still Needed: 3 Units in MGMT 6490						
	<input type="checkbox"/> Business Policy	Requirement: Still Needed: 3 Units in BUS 4500 or 4502 Grade = A						
	<input type="checkbox"/> Principles of Marketing	Requirement: Still Needed: 3 Units in MKTG 3405						
	<input type="checkbox"/> Foreign Requirement						Academic Year: 2010-2011	GPA: 0.000

Portal	FAQ	Help	Print	Exception Management	Log Out			
Find Student ID	Name	Degree	Major	Level	Classification	Last Audit	Last Refresh	
****456	Gerrard, Stephen	B.A.	Banner Accounting	U	Senior	Today	07/31/2008 at 5:42 p.m	
Worksheets	Planner	Notes	Petitions	Exceptions	GPA Calc	Admin		
Worksheets	Format:							
	Registrar Report	View	Process New					Class History
				<input checked="" type="checkbox"/> Include in-progress classes				
				<input checked="" type="checkbox"/> Include preregistered classes				
History	<input type="checkbox"/> Foreign Requirement						Academic Year: 2010-2011	GPA: 0.000
What If	<input type="checkbox"/> FOREIGN LANGUAGE REQUIREMENT	Requirement:						
Look Ahead	<input type="checkbox"/> Multi-Cultural Studies		Still Needed:	Choose from 1 of the following:				
Financial Aid	<input type="checkbox"/> Spanish Culture	Requirement:		1 Group in				
	<input type="checkbox"/> Welsh Culture			(1 Class in WELS 100) or				
	<input type="checkbox"/> Fench Culture	Requirement:		1 Classes in WELS 100				
	<input type="checkbox"/> Beginnig French			(1 Class in FREN 101) or				
	<input type="checkbox"/> FREN 200 and FRE 306, 304 or 499	Requirement:		2 Classes in FREN 1010 , 102 , 1020 , 200 Including FREN 200				
	<input type="checkbox"/> Literature			(Choose from 1 of the following:) or				
	<input type="checkbox"/> Practice of Literary Study	Requirement:		1 Group in				
	<input type="checkbox"/> Literature I			(2 Classes in LIT 101 or 201 or 203 Including LIT 201)				
	<input type="checkbox"/> Multi-Cultural Communication	Requirement:		2 Classes in LIT 101 , 201 , 203 Including LIT 201				
	<input type="checkbox"/> French Communication			(Choose from 1 of the following:)				
	<input type="checkbox"/> Spanish Communication	Requirement:		1 Group in				
	<input type="checkbox"/> French Communication			(3 Classes in FREN 200 and 2020 and 2010) or				
	<input type="checkbox"/> Spanish Communication	Requirement:		3 Classes in FREN 200 + 2020 + 2010				
	<input type="checkbox"/> Spanish Communication			(3 Classes in SP 208 or SPAN 361 or 423)				
	<input type="checkbox"/> Spanish Communication	Requirement:		3 Classes in SP 208 , SPAN 361 , 423				
	<input type="checkbox"/> Go Reds						Academic Year: 2010-2011	GPA: 0.000

Portal FAQ Help Print Exception Management Log Out

Find Student ID: ****456 Name: Gerrard, Stephen Degree: B.A. Major: Banner Accounting Level: U Classification: Senior Last Audit: Today Last Refresh: 07/31/2008 at 5:42 p.m.

Worksheets Planner Notes Petitions Exceptions GPA Calc Admin

Worksheets Format: Registrar Report View Process New Include in-progress classes Include preregistered classes [Class History](#)

History Academic Year: 2010-2011
GPA: 2.000

What If

Look Ahead

Financial Aid

<input type="checkbox"/> Go Reds	Requirement:	
<input type="checkbox"/> Classes planned for Summer 2008	Requirement:	
<input checked="" type="checkbox"/> Some math course - 3 Units	Requirement:	3 Credits in COMM 1000
<input checked="" type="checkbox"/> DATA STRUCT/ALGOR - 3 Units	Requirement:	3 Credits in CS 3240
<input type="checkbox"/> PC FUNDAMENTALS - 3 Units	Requirement:	Still Needed: 3 Units in CIS 1270
<input type="checkbox"/> Principles of Economics I - 3 Units	Requirement:	Still Needed: 3 Units in ECON 2301
<input type="checkbox"/> Classes planned for Spring 2009	Requirement:	
<input type="checkbox"/> The Welsh Celts - 3 Units	Requirement:	Still Needed: 3 Units in WELS 200
<input type="checkbox"/> More Welsh Folklore - 3 Units	Requirement:	Still Needed: 3 Units in WELS 300
<input type="checkbox"/> Western Civilization - 3 Units	Requirement:	Still Needed: 3 Units in HIST 101
<input type="checkbox"/> Music Appreciation - 4 Units	Requirement:	Still Needed: 4 Units in MUSC 100
<input type="checkbox"/> Classes planned for Summer 2009	Requirement:	
<input type="checkbox"/> French for Beginners - 3 Units	Requirement:	Still Needed: 3 Units in FREN 101
<input type="checkbox"/> Introduction to French - 3 Units	Requirement:	Still Needed: 3 Units in FREN 1010
<input type="checkbox"/> Adv Span Language - 1 Unit	Requirement:	Still Needed: 1 Unit in SP 208
<input type="checkbox"/> 20th Cent. Spanish Novel - 2.4 Units	Requirement:	Still Needed: 2.4 Units in SPAN 361

Portal	FAQ	Help	Print	Exception Management	Log Out				
Find <input type="text" value="****456"/>	Student ID <input type="text" value="Gerrard, Stephen"/>	Name <input type="text" value="B.A."/>	Degree <input type="text" value="Banner Accounting"/>	Major <input type="text" value="U"/>	Level <input type="text" value="Senior"/>	Classification <input type="text" value="Today"/>	Last Audit <input type="text" value="07/31/2008 at 5:42 p.m."/>	Last Refresh <input type="text" value=""/>	
Worksheets	Planner	Notes	Petitions	Exceptions	GPA Calc	Admin			
Worksheets	Format: <input type="text" value="Registrar Report"/>	<input type="button" value="View"/>	<input type="button" value="Process New"/>	<input checked="" type="checkbox"/> Include in-progress classes	<input checked="" type="checkbox"/> Include preregistered classes	Class History			
History	Requirement: 1 Credits in SP 208								
	<input type="checkbox"/> 20th Cent. Spanish Novel - 2.4 Units	Still Needed: 2.4 Units in SPAN 361							
What If	Requirement: 2.4 Credits in SPAN 361								
	<input type="checkbox"/> Lorca, Dali, Bunuel - 1 Unit	Still Needed: 1 Unit in SPAN 423							
Look Ahead	Requirement: 1 Credits in SPAN 423								
Financial Aid	Fallthrough Courses				Units Applied: 20.368	Classes Applied: 6			
	A 3590	DATA COMM NETWORK III	B	4.789	Winter 2004				
	CS 3560	INTR SYSTEMS PROG	B	4	Spring 2002				
	D 3580	DATA COMM NETWORK II	C	4.456	Fall 2003				
	E 3570	DATA COMM NETWORK I	C	4.123	Summer 2003				
	PHIL 1001	Introduction to Logic	C	3	Winter 2001				
	X 3590	DATA COMM NETWORK III	P	0	Winter 2004				
	In-progress				Units Applied: 13.368	Classes Applied: 8			
	A 3590	DATA COMM NETWORK III	B	4.789	Winter 2004				
	CIS 1270	PC Fundamentals	B	0	Summer 2003				
	Satisfied by:	CS 101 - Napier University							
	D 3580	DATA COMM NETWORK II	C	4.456	Fall 2003				
	E 3570	DATA COMM NETWORK I	C	4.123	Summer 2003				
	ECON 2301	Principles of Macroeconomics	B	0	Summer 2003				
	Satisfied by:	EC 101 - Napier University							
	ECON 2302	Principles of Microeconomics	B	0	Winter 2004				
	Satisfied by:	EC 102 - Napier University							
	ENGL 1001	Expository Writing I	A	0	Fall 2003				
	Satisfied by:	EN 105 - Napier University							
	X 3590	DATA COMM NETWORK III	P	0	Winter 2004				
	Exceptions								
	Type	Description	Date	Who	Block	Enforced			
	Also Allow	TEST	07/30/2008	Manager, DegreeWorks Middle Second	RA001317	No			
	Force Complete	hello & goodbye & what & yeah	08/06/2008	Manager, DegreeWorks Middle Second	RA001342	No			
	Force Complete	this & that & the other & that other thing too	08/06/2008	Manager, DegreeWorks Middle Second	RA001334	No			
	Notes								
	Student and advisor discussed student's career plans.			Entered by	Manager, DegreeWorks Middle Se		Date	09/22/2008	

Registration Checklist

Here is an example of a Registration Checklist Worksheet.

The screenshot displays a web interface for a student's registration checklist. At the top, there are navigation tabs: Portal, FAQ, Help, Print, Exception Management, and Log Out. Below these are search fields for Student ID (****456), Name (Gerrard, Stephen), Degree (B.A.), Major (Banner Accounting), Level (U), and Classification (Senior). There are also fields for Last Audit (Today) and Last Refresh (07/31/2008 at 5:42 p.m.).

The main content area is divided into several sections:

- Worksheets:** Includes a 'Format:' dropdown set to 'Registration Checklist', a 'View' button, and a 'Process New' button. There are checkboxes for 'Include in-progress classes' and 'Include preregistered classes', both of which are checked. A 'Class History' link is also present.
- History:** Shows a 'Bachelor of Arts Degree' for the 'Catalog Year: 2010-2011'.
- What If:** Lists 'Still Needed' items: 'See Major in Accounting section', 'See Foreign Requirement section', and 'See Go Reds section'.
- Look Ahead:** Shows a 'Major in Accounting' for the 'Catalog Year: 2010-2011' with 'Units Required: 63' and 'GPA: 3.8'. It also shows 'Units Applied: 15'.
- Financial Aid:** Lists 'Still Needed' items with unit requirements and course numbers:
 - 3 Units in ACCT 1101 Grade >= B
 - 3 Units in ACCT 1102
 - 3 Units in
 - 3 Units in
 - 3 Units in
 - 3 Units in ECON 3005
 - 4 Units in
 - 3 Units in ENGL 1002
 - 3 Units in FIN 3300
 - 3 Units in MGMT 1020 or 1102
 - 3 Units in MGMT 2701
 - 3 Units in MGMT 3110
 - 3 Units in MGMT 3620
 - 3 Units in MGMT 6490
 - 3 Units in BUS 4500 or 4502 Grade = A
 - 3 Units in MKTG 3405

SOC Report

Here is an example of a SOC (Servicemembers Opportunity Colleges) Report Worksheet.

SOC DNS Student Agreement	SOCAD [X]	SOCNAV []	SOCMAR []	SOCOAST []
	Associate: []	Bachelor's: [X]	Also Army Career Deg: []	

Privacy Act Statement: The home college is authorized to transmit a copy of this Agreement to Servicemembers Opportunity Colleges (SOC), and to transmit this and periodic academic progress reports to appropriate U.S. military voluntary education offices. Consistent with the requirements of the current Federal Privacy Act, the college will not release any information to outside parties without the written permission of the student. Disclosure of all personal information is voluntary. However, failure to do so may result in the applicant not being able to participate in this SOC Degree Network System program.

College	Ellucian University		
DNS Network	Anthropology		
Degree Title	Bachelor of Arts		
Student Name	Beans, Ruari Padraig		
Social Security #, Last 4 Digits Only	1234		
Branch of Service (or "Family")	Army		
Pay Grade	E5	MOS/Rating:	PS2
Military Installation	Vashon Army Base		

The home college should retain two copies of this Agreement and provide one copy each to the student, the student's Education Services Office, and the SOC office. Send SOC's copy to Servicemembers Opportunity Colleges 1307 New York Avenue, N.W. Fifth Floor Washington DC 20005-4701 Telephone: (800) 368-5622 or (202) 667-0079.

Agreement is binding **only** when signed by an authorized college official.

Signature of College Official		Date	
Name of College Official		Title	
Student Signature (optional)		Other Degree Requirements (residency, GPA, etc.)	
Semester Hours: [X] Quarter Hours: []			

General Ed Requirements		30												
<i>24 Hours needed</i>														
<i>This is line 1 of the header remark. This is line 2 of the header remark.</i>														
	Language option Choose from 1 of the following:	6										3		
SPAN @	- Spanish	(6)												
FREN @	- French	(6)												
ITAL @	- Italian	(6)												
MATH 12@	Intro to Math	3										3		
<i>This is line 1 of the rule remark. This is line 2 of the rule remark.</i>														
	Communication	(9)												
COMM 201	- Basic Speech	3										3		
COMM 202	- Intro to Debate	3										3		
LARC 245	- Intro to Landscape	2										0		
Electives for degree														
<i>FLOAT 101</i>	<i>Floating point GPA problem</i>	0.5												
<i>LARC 242</i>	<i>Intro to Landscape Graphics</i>			3										
<i>LARC 246</i>	<i>Landscape Graphics II</i>							3						
<i>MTH 1**</i>	<i>WOMENS VARSITY SWIMMING C</i>	1												
<i>PLAN 101</i>	<i>Planned Class</i>	2												
<i>SAFIA 101</i>	<i>WOMENS VARSITY SWIMMING B</i>	3												
<i>XPAN 102</i>	<i>Intro to Spanish II</i>	3												
<i>XPAN 102</i>	<i>Intro to Spanish II</i>	3												
<i>ZERO 101</i>	<i>WOMENS VARSITY SWIMMING D</i>													
TOTALS		70	24.5	3	0	0	3	3	0	0	0	36.5		

Before taking courses at another college, consult the SOC DNS-2 or -4 Handbook for guaranteed-transfer courses in DNS Course Categories. Student: After completing courses at another college, have an official transcript sent to your home college. Student Agreement remains in force for the length of time established by the home college. Breaks in attendance of two years or less will not invalidate the Student Agreement; attendance will not be exclusively defined by taking courses from the home college. Form edition December 2010

Student Data Report

Here is an example of a Student Data Report Worksheet.

Portal FAQ Help Print Exception Management Log Out

Find Student ID: **** Name: Feist, Jeffrey Degree: B.S. Mgt Major: Management (SOC) Level: U Classification: Senior Last Audit: 08/15/2008 Last Refresh: 10/24/2007 at 3:04 p.m.

Worksheets Planner Notes Petitions Exceptions GPA Calc Admin

Worksheets > Format: Student Data Report View Process New Include in-progress classes Include preregistered classes Class History

DegreeWorks Student Data

Primary-Mst

Id	Name	Nickname	FormatName	SortName	AssocType	UserDef1	UserDef2	UserDef3	UserDef4	UserDef5	UserDef6	UserDef7	UserDef8	UserDef9
S001	Feist, Jeffrey	Jeffrey		FEIST,JEFFREY	NSNNNNNNNN									

Student-Mst

Id	Term	TrCredits	TrDegree	HsEts	HsGpa	HsGradDate	UserDef1	UserDef2	UserDef3	UserDef4	UserDef5	UserDef6	UserDef7	UserDef8	UserDef9	UserDef10
S001	20033															

Degree-Dtl

Term	Id	School	College	StuLevel	DegreeCode	DegreePlan	CatalogYr	DegInterest	Mjmn1	Mjmn1Type	Mjmn1Conc1	Mjmn1Conc2	Mjmn1Conc3	Mjmn1C
20033	S001	U		SR	BS-MGT		20102011		MGT	J				

School-Dtl

Term-Dtl

Term	Id	School	DegInterest	TrmHonor	Probation	TimeCode	CumTotEarn	CumTrEarn	CumCrEarn	CumGrAtt	CumGrPts	CumGpa	UserDef1	UserDef2	UserDef3
20033	S001	U					217.000	141.000	076.000			002.973			

Class-Dtl

Course	Term	Id	Discipline	CourseNumber	CourseTitle	Audit	Insufficient	Inprogress	Withdraw	Incomplete	PassFlag	PassFail	FinalGrade
COMM 1000	20021	S001	COMM	1000	Public Speaking	N	N	N	N	N	Y	N	C
CS 3240	20022	S001	CS	3240	DATA STRUCT/ALGOR	N	N	N	N	N	Y	N	C
CS 3560	20022	S001	CS	3560	INTR SYSTEMS PROG	N	N	N	N	N	Y	N	B
CS 3590	20022	S001	CS	3590	DATA COMM NETWORK	N	N	N	N	N	Y	N	C
ENGL 3100	20014	S001	ENGL	3100	Poetry Writing	N	N	N	N	N	Y	N	B
FIN 3320	20021	S001	FIN	3320	Financial Markets	N	N	N	N	N	Y	N	A
MATH 1030	20014	S001	MATH	1030	College Algebra	N	N	N	N	N	Y	N	A
MGMT 3614	20021	S001	MGMT	3614	Organizational Behavior	N	N	N	N	N	Y	N	A
PHIL 1001	20011	S001	PHIL	1001	Introduction to Logic	N	N	N	N	N	Y	N	C
STAT 1000	20021	S001	STAT	1000	Statistics	N	N	N	N	N	Y	N	A

Transfer-Dtl

Course	Term	Id	Discipline	CourseNumber	CourseTitle	TrEts	TrName	TrCrseKey	TrCourse	TrCred
CIS 1270	20004	S001	CIS	1270	PC Fundamentals	3751615	Napier University	CS 101	Intro to Computers	
CS 4310	20004	S001	CS	4310	Software Engineering I	3751615	Napier University	CS 202	Software Engineering	
CS 4560	20004	S001	CS	4560	Operating Systems	3751615	Napier University	CS 204	Operating sys	
CS 4590	20004	S001	CS	4590	Computer Networks	3751615	Napier University	CS 200	Networks	
ECON 2301	20004	S001	ECON	2301	Principles of Macroeconomics	3751615	Napier University	EC 101	Macroeconomics	
ECON 2302	20004	S001	ECON	2302	Principles of Microeconomics	3751615	Napier University	EC 102	Microeconomics	
ENGL 1001	20004	S001	ENGL	1001	Expository Writing I	3751615	Napier University	EN 105	Writing Strategies	
ENGL 1002	20004	S001	ENGL	1002	Expository Writing II	3751615	Napier University	EN 106	Writing Purposes and Research	

Student View

Here is an example of a Student View Worksheet.

Portal	FAQ	Help	Print	Exception Management	Log Out
--------	-----	------	-------	----------------------	---------

Find	Student ID	Name	Degree	Major	Level	Classification	Last Audit	Last Refresh
	****456	Gerrard, Stephen	B.A.	Banner Accounting	U	Freshman	Today	Today at 4:36 p.m.

Worksheets	Planner	Notes	Petitions	Exceptions	GPA Calc	Admin
------------	---------	-------	-----------	------------	----------	-------

Worksheets	Format:	View	Process New	<input checked="" type="checkbox"/> Include in-progress classes	<input checked="" type="checkbox"/> Include preregistered classes	Class History
	Student View					

History	Student View AA037036 as of 09/25/2008 at 17:47				
What If	Student	Gerrard, Stephen	Level	Undergraduate School	
	ID	****456	College		
Look Ahead	Advisor 1		Degree	BACHELOR OF ARTS	
	Advisor 2		Major	Banner Accounting	
Financial Aid	Overall GPA	0.000	Classification	Freshman	

Degree Progress

Requirements	8%
Units	0%

<input checked="" type="checkbox"/> Bachelor of Arts Degree	Academic Year:	2010-2011	Units Required:	186
	GPA:	0.000	Units Applied:	0
Unmet conditions for this set of requirements: 186 Units needed Minimum Units unsatisfied 45 Units in residence needed				
<input type="checkbox"/> MAJOR REQUIREMENTS Still Needed: See Major in Accounting section				
<input checked="" type="checkbox"/> Foreign Language Requirements				
<input type="checkbox"/> Ed Plan Requirements Still Needed: OTHER = PLAN block was not found but is required				
<input checked="" type="checkbox"/> Major in Accounting	Academic Year:	2010-2011	Units Required:	63
	GPA:	0.000	Units Applied:	0
Unmet conditions for this set of requirements: 63 Units needed Minimum GPA unsatisfied				
<input type="checkbox"/> Principles of Accounting I Still Needed: 3 Units in ACCT 1101				
<input type="checkbox"/> Principles of Accounting II Still Needed: 3 Units in ACCT 1102				
<input type="checkbox"/> Introduction to Computers Still Needed: 3 Units in CIS 1270				
<input type="checkbox"/> Principles of Economics (Macro) Still Needed: 3 Units in ECON 2301				
<input type="checkbox"/> Principles of Economics (Micro) Still Needed: 3 Units in ECON 2302				
<input type="checkbox"/> Intermediate Macroeconomics Still Needed: 3 Units in ECON 3005				
<input type="checkbox"/> Writing Strategies and Concepts Still Needed: 4 Units in ENGL 1001				

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Portal	FAQ	Help	Print	Exception Management	Log Out		
Find Student ID	Name	Degree	Major	Level	Classification	Last Audit	Last Refresh
****456	Gerrard, Stephen	B.A.	Banner Accounting	U	Freshman	Today	Today at 4:36 p.m.
Worksheets	Planner	Notes	Petitions	Exceptions	GPA Calc	Admin	
Worksheets	Format:	Process New		<input checked="" type="checkbox"/> Include in-progress classes <input checked="" type="checkbox"/> Include preregistered classes		Class History	
History	Student View	View					
What If	<input type="checkbox"/> Business Law I			Still Needed: 3 Units in MGMT 2701			
Look Ahead	<input type="checkbox"/> Business Law II			Still Needed: 3 Units in MGMT 3110			
Financial Aid	<input type="checkbox"/> Organizational Behavior			Still Needed: 3 Units in MGMT 3614			
	<input type="checkbox"/> Production/Operations Mgmt			Still Needed: 3 Units in MGMT 3620			
	<input type="checkbox"/> Senior Seminar in Management			Still Needed: 3 Units in MGMT 6490			
	<input type="checkbox"/> Business Policy			Still Needed: 3 Units in BUS 4500 or 4502			
	<input type="checkbox"/> Principles of Marketing			Still Needed: 3 Units in MKTG 3405			
	<input checked="" type="checkbox"/> Foreign Requirement			Academic Year: 2010-2011		GPA: 0.000	
	<input checked="" type="checkbox"/> FOREIGN LANGUAGE REQUIREMENT						
	Exception By: Manager, DegreeWorks Middle Second		On: 09/25/2008	Force Complete : Year in Berlin - skip FL requirement			
	<input type="checkbox"/> Multi-Cultural Studies			Still Needed: Choose from 1 of the following:			
Exceptions							
Type	Description	Date	Who	Block	Enforced		
Force Complete	Year in Berlin - skip FL requirement	09/25/2008	Manager, DegreeWorks Middle Second	RA001334	Yes		
Force Complete	Waive 2.0 Minimum GPA Requirement	09/25/2008	Manager, DegreeWorks Middle Second	RA001340	Yes		
Notes							
				Entered by	Date		
Stephen would like to waive the Major GPA requirement.				Manager, DegreeWorks Middle Se	09/25/2008		
Stephen would like to change the computer requirement to a math requirement (MATH 2220) instead.				Manager, DegreeWorks Middle Se	09/25/2008		
Stephen should be able to skip the introductory accounting course because his father is an accountant.				Manager, DegreeWorks Middle Se	09/25/2008		
Stephen spent a year in Berlin and should skip the foreign language requirement.				Manager, DegreeWorks Middle Se	09/25/2008		
Faculty advisor referred the student to the Financial Aid Office.				Manager, DegreeWorks Middle Se	09/25/2008		
Student was advised to go on a student abroad trip.				Manager, DegreeWorks Middle Se	09/25/2008		
Student was advised to register for the courses listed on the Planner.				Manager, DegreeWorks Middle Se	09/25/2008		
Legend							
<input checked="" type="checkbox"/> Complete	<input checked="" type="checkbox"/> Complete except for classes in-progress			(T) Transfer Class			
<input type="checkbox"/> Not Complete	<input checked="" type="checkbox"/> Nearly complete - see advisor			@ Any course number			
Disclaimer							
You are encouraged to use this degree audit report as a guide when planning your progress toward completion of the above requirements. Your academic advisor or the Registrar's Office may be contacted for assistance in interpreting this report. This audit is not your academic transcript and it is not official notification of completion of degree or certificate requirements. Please contact the Registrar's Office regarding this degree audit report, your official degree/certificate completion status, or to obtain a copy of your academic transcript.							

Admin

The Admin tab gives administrative users access to special services.

Web Analyze

The Web Analyze service under the Admin tab allows an administrative user to review the state of Degree Works as it pertains to its web requests. If the system is experiencing severe problems you may want to go ADMIN within Transit and run webanalyze that way; when severe problems are occurring this Web Page may be affected. Warning: if you are load balancing the classic server the results here will only represent the requests that hit one of the servers.

The screenshot shows the Degree Works Admin interface. At the top, there are navigation tabs: Back to Self-Service, Portal, FAQ, Help, Print, Exception Management, and Template Management. Below these is a search bar with fields for Student ID, Name, Degree, Major, Level, Classification, Campus, and Last Audit. A row of buttons includes Worksheets, Planner, Plans, Notes, Petitions, Exceptions, GPA Calc, and Admin. The Admin tab is selected, and the Web Analyze tool is active. The tool's output is displayed in a text area, showing the following information:

```
Analyzing /home/rdeans/WorkSpaces/main/admin/logdebug/web.log

##### Overview Section #####

Number of dap09's started = 1 ; still running = 1
Number of web04's started = 1 ; still running = 1
Number of utl79's started = 1 ; still running = 1
Number of web09's started = 1 ; still running = 1
Number of web08's currently running = 2

webtime web08 summary:

WEB08 processed 74 requests

Fastest time for WEB08 to process a request      = 0.102 seconds
Slowest time for WEB08 to process a request      = 1.952 seconds

Average time for WEB08 to process requests      = 0.267 seconds
```

Debug

Users can enable debugging in the Dashboard Servlet to troubleshoot issues for their session. Users with access to this functionality will be able to enable and disable debug from a page under the Admin tab. All debugging output for the application is aggregated into one file, even if multiple applications (including Student Educational Planner and Transfer Finder) or APIs are involved. Access to the application server is not needed and the application does not need to be restarted. However, access to the server is required to access the generated log file, which will be in the logs directory of the application server.

Access to Debugging

In order to access the debugging functionality, users should be assigned the **DEBUG** key either via the Users function of Shepentry or in SHPCFG. Users with this key will see the Debug option under the Admin tab in the Dashboard Servlet. Clicking on this link will take the user to the Debug page.

Enabling Debug

On the Debug page, toggle the Enable Debug switch to turn debugging on for the Dashboard Servlet, including the Student Educational Planner and Transfer Finder applications. A random Debug Tag will be generated, and the user can copy this to their clipboard by clicking on the page icon. This Debug Tag will be appended to each line of debug in the log file so that the user can easily identify which lines are from their session, as opposed to other users using the application at the same time.

After enabling debug, the user can then resume using the Dashboard Servlet and execute the steps to duplicate the issue they are experiencing. Debug should be turned off by going back to the Debug page and toggling the Enable Debug switch once the issue has been duplicated. Debug for this user's session will also be turned off when they log out of the application.

Accessing Debug Files

Debug will appear in the Dashboard Servlet log file on the application server. This is typically `$(CATALINA_HOME)/logs` for Apache Tomcat or `$(MIDDLEWARE_HOME)/user_projects/domains/<domainname>/servers/<servername>/logs` for WebLogic.

Searching for the user's Debug Tag will isolate the lines of debug specific to their actions. For example:

```
2017-10-24 16:22:23,144 68b4e19d-3fb4-4975-9815-83eea01266ff DEBUG [41-exec-17]
.h.d.s.s.StatelessPreAuthenticatedFilter : Checking secure context token: null
```

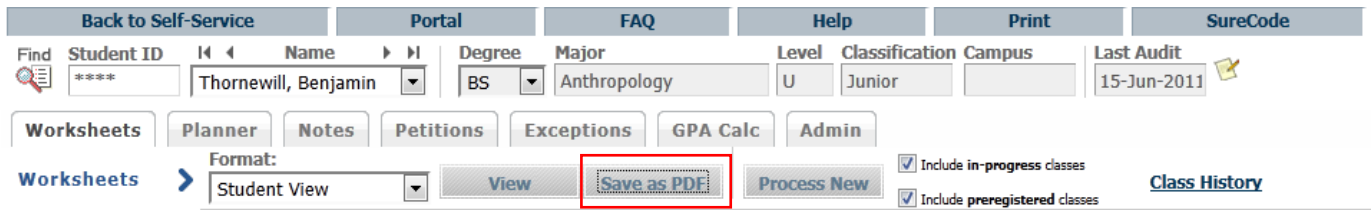
The `packdebug` script can be used to collect the log files generated for a user session's Debug Tag. For more information on using this script, please refer to the *Degree Works Technical Guide*.

Save Audits as PDF

You can save audits in the Portable Document Format (PDF) using the Web Interface and through the DAP22 batch process. See the *Transit User Guide* for DAP22 PDF options and configuration information.

The **Save as PDF** button is available in the Worksheets, History, and What If links under the Worksheets tab, based on the Shepherd key security. When you click **Save as PDF**, the selected worksheet details are displayed as a PDF in a new window. You can save or print the PDF. In the History function, the selected worksheet Format and Historic Report combination is used to determine the audit which is used for the PDF report. The actual prompts and sequence of prompts for viewing and printing the PDF can vary, depending on the browser because of Adobe Reader's behavior within that specific browser.

The following screenshot shows the location of the **Save as PDF** button:



The following screenshot shows the audit details in PDF format:

Student View for Thomewill, Benjamin - 1991

Student View AAD46658 as of 15JUN11 at 17:11

Student	Thomewill, Benjamin	School	Undergraduate (U)
ID	1991	Degree	Bachelor of Science
Level	Junior	College	College of Professional Studie
Advisor	Deans, Raymond	Majors	Anthropology, Mathematics
Overall GPA	3.00	Minor	

Degree Progress

Requirements Credits: 15%
 Credits: 9%

Bachelor of Science Degree Catalog Year: 2003-2004 Credits Required: 185
 GPA: 3 Credits Applied: 18

Unmet conditions for this set of requirements: 170 Credits needed
 Your GPA in SPAN classes is 0.
 You need a 2.0 in MATH classes. Yours is 2.67. You need a 2.0 in ENGL classes. Yours is 4. You need a 2.0 in SPAN classes. Yours is 0.

- Higher Education GPA Above 2.0
- Cumulative GPA Above 2.0
- Major Requirements **Still Needed:** See Major in Anthropology section See Major in Math section
- Elective Courses **Still Needed:** See Electives section
- Planner Block **Still Needed:** OTHER - PLAN block was not found but is required

Major in Anthropology Catalog Year: 2003-2004 Credits Required: 45
 GPA: 0 Credits Applied: 0

Unmet conditions for this set of requirements: 45 Credits needed
 Minimum GPA unsatisfied
 16 Credits in residence needed

Enabling the Save as PDF functionality

Ensure that the following steps are completed to enable the save as PDF functionality in the Web Interface:

1. Ensure that your site has Apache FOP (Formatting Objects Processor) installed on your Degree Works server. This software should be installed as a pre-requisite for the initial Degree Works installation.
2. Grant the Shepherd key- SDAUDPDF to required users. Users with this key will have access to the **Save as PDF** button in the Web Interface.
3. Modify UCX-RPT036 for each of the web reports. You can specify a specific FOP stylesheet name in the “FOP XSL Stylesheet” field or leave it blank to use the default fopaudits.xml file. For example, for the WEB30 Registrar Report entry you can specify fopregistrar.xml and then create a fopregistrar.xml file under local/xml.
4. Copy the standard *fop*.xml* stylesheets under the *\$ADMIN_HOME/xml* directory to your *\$LOCAL_HOME/xml* directory on the server. Make your changes to the stylesheets in the *\$LOCAL_HOME/xml* directory.

Note: Reports run from Transit rely on the “XSL Stylesheet” field in UCX-RPT036 to get the name of the FOP/PDF stylesheet and not the newer “FOP XSL Stylesheet” field. This second field is ignored for Transit reports.

If FOP was unable to create the PDF file because of errors in your stylesheet you will get an appropriate error returned to you on the web and the logdebug/web.log file will contain details of the errors.

For clients who need to customize the PDF output, technical and operational details about FOP can be found at: <http://xmlgraphics.apache.org/fop/>

5. For the user, the Adobe Reader installation is required.

A FOP stylesheet exists for each of the different types of audits:

Audit type	Stylesheet
Academic Audits	fopaudits.xml
Financial Aid Audits	fopaudits-aid.xml
Athletic Eligibility Audits	fopaudits-athl.xml

Each of these should be placed in *\$LOCAL_HOME/xml* along with the handful of other stylesheets that are included by these three. Since these three reports share a set of stylesheets care needs to be taken when making a change to these included stylesheets since changes to them affect all three reports.

