DegreeWorks Instructional Guide

☐ Home page
  o Students don’t see this page
  o Advisors will see different options/tabs based on security
    ▪ Advisor security classes (ADVP (Advising Power User), ADV (Professional/Group/Depa
    ▪ rtmental Advisor), ADVX (Faculty Advisor), DEPT (Departmental Admin/Advising Assistant)
  o Search by 790 or Find students by data element(s)

☐ Find

[Student/790-XXX-XXX] or Your Advising List of Students
  o Review each search element; focus on Catalog Year 2014-15
  o Remove and Clear buttons
  o Search and max (arbitrary) records to load
  o Check/Uncheck those to be loaded to the advisor’s list
  o Arrow buttons on Name field to scroll through loaded students
  o Other header fields:
    ▪ Degree – everything is driven by Degree; review program/curriculum structure
    ▪ Only undergraduate programs have been scribed
    ▪ Class determined by ??
    ▪ Last Audit and Last Refresh
    ▪ Banner Refresh button
    ▪ Notes – will explain in a later section
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Worksheets

- **Format**: buttons/options
  - View after each change in worksheet format
  - Save as PDF; don’t use browser print button
  - Process New; use only when something has changed in the scribe or in Banner (e.g. major was just changed earlier in the day, Registrar’s Office notified advisors of a correction to the degree requirements)
  - Class History – emphasize it is NOT a transcript

- **Definition of a “Block”**

- **Legend**

- **Save/Freeze an audit**: only certain staff will have access (e.g. program advisors (i.e. Missoula College programs, Four Bear), grad evaluators, etc.; freeze types will be defined prior to go live

- **Student View**
  - Student Block
    - Hyperlinks
    - Some configuration work still in progress (i.e. inactive codes, code descriptions, codes + descriptions for majors, duplicate cohort codes, course attribute lists)
    - Dual degrees [use 790663153]
    - Dual major [use 790671618]
    - Major/Minor/Conentration [use 790718969]
    - **Institutional GPA** (not Overall)
    - Total Credits Earned / *(plus)* In Progress
  - Degree Progress bar
    - Review disclaimer (12 out of 20 *requirements* completed = 60%
  - Degree Block
    - Non coursework requirements (i.e. resident and upper division credits, min GPA, etc.)
    - Note **Credits Required** and **Credits Applied** info
    - Links to GenEd, Major, Minor, Concentration blocks
    - Undeclared students will see a message indicating they will only see the gen ed block until they declare a major and can use the What If, Look Ahead and GPA Calculator functions

- **General Education Requirements Block**
  - Undeclared students will only see this block
  - Unmet conditions statement for the block can contain a range of credits when the courses included can be for variable credit
  - Transfer work is noted when applicable (term 200570)
  - Requirements beginning with ‘DD’ are just test data for the Registrar’s Office as they decide on the best format for
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displaying the requirement; see Upper Division Writing Requirement as an example.

- **Course Information**
  - Hyperlinks
  - Hovering
  - * = Prerequisite
  - Course details; section details will display if registration for
    the term is open
  - Course attribute lists

- **Major Block**
  - Note Major GPA, Credits Required and Credits Applied info
  - Major GPA requirements are listed within the Major Block
  - Scribed exactly from the 20145-15 Catalog; DO NOT use
    advising checklists to validate the requirements; academic
    departments must seek catalog changes if the catalog was
    incorrect when the degree audit system was scribed; exceptions
    can be submitted by the department and processed by the
    Registrar’s office while the changes are pending approval for
    the next year’s catalog

- **General Electives Block**
  - Courses that do not apply to any specific degree requirements
    and apply to overall credits only.
  - Transfer work is noted when applicable (term 200570)

- **Failed, Withdrawn, Repeated (Excluded) Block**
  - Course that do not apply to any specific degree requirements
    and do not apply to overall credits
  - “Remedial (Developmental)” text will be added to the block
    heading to help the students understand why a course with a
    passing remedial grade is not counted

- **In-Progress/Future Registration Block**
  - Courses listed in alpha order, not term order

- **Graduation Checklist**
  - Streamlined view of the degree audit without all the course and advice
    text

- **Registration Checklist**
  - Displays unmet course requirements. Way Cool, huh?!

- Other diagnostic reports for RO and Advising Power Users
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**Tabs**
- Planner – old planner software; will be removed before go live
- Plans – new planner software; SEP – Student Educational Planner; implementation will begin mid-April; more info to come.
- Notes
  - Need assistance is finalizing a list of pre-defined notes
  - Newest note will display first
  - Similar to current UADVISE notes - no modify or delete capability
  - Notes will display to students and all other users at the bottom of the audit (both online and printed copies)
  - Rule of thumb: these notes are reminders about progressing to degree completion. Other notes about referrals, advising pins, discussion topics, etc. will be entered either UADVISE or in SEP and/or the Banner XE Advising Profile when implemented later this year.
  - Students will have access to Notes tab
- Petitions
  - Won’t be used until we implement Workflow
  - Who will have access to add, modify and delete will be decided then
- Exceptions
  - Only the Registrar’s Office will have access to process Exceptions; academic departments will continue to submit exceptions via email and paper to RO for processing within DegreeWorks
  - Processed exceptions will appear in bold blue text on the audit [use 790576129 as an example]
  - Review current Exception Types
- GPA Calculators [use 790718969 as an example]
  - Graduation Calculator [use Credits Remaining = 54, Credits Required = 120, Desired GPA=3.0]
  - Term Calculator
    - Pre-populates current and future registered courses
  - Advice Calculator
    - Works through anMinimum credits
    - Linked to Advising Directory

**Utilities and Add-Ons**
- History
  - Currently configured to save last 3 audits
- What If
  - Review disclaimer about major changes
  - [use 790729158 as an example; change to History; loses ANTY 210N]
- What If History
- Look Ahead
  - Determines if and how a particular course will slot into the audit
  - [use 790729158 as an example; ANTY 336]
Hi All,

In preparation for Thursday’s Degree Works End User Training, I thought it might be helpful for you all to see a little preview of the product. It might give us a little head start and give you some of the basic lingo of the product so it all doesn’t seem so overwhelming when you get into the lab on Thursday.

Ellucian provided a pre-recorded Web Ex of a demo on our project web site. It’s a couple of years old but the basic look and feel and terminology of the product is the same as what you will see on Thursday.

I know it’s crazy busy for all of us so I’ve bookmarked the parts I think will be most helpful. The key part only takes about 10 minutes to watch.

Preview DegreeWorks to access the Web Ex. You may need to install the WebEx application on your computer. Hopefully most of you have administrator privileges on your machines. But please let me know if you run into any problems accessing it.

Once the video buffers a little you should be able to use the slide arrow at the bottom of the screen to fast forward to the key parts. Here’s the “bookmark” (i.e. times) of the parts that I think will be most helpful for Thursday. The highlighted topic is the most important.

- **Basic overview of the product** 6:00 – 15:45
- **What-If Scenarios** 17:00 – 18:30
- **FinAid Eligibility** 18:40 – 19:50
- **NCAA Eligibility** 20:00 – 22:30

The last 20 minutes of the video are about parts of the software that we'll install later so probably no need to review those if you’re short on time.

Please note, the version of the product you will see on Thursday will look a little different. We will use the one customized for UM and the data that we’ll be using for testing with be our 14/15 catalog.

Thanks again for making the time for this!

Julie Cannon
Director of Technology Tools
Hi All,

Thanks SO much for being our 2nd round of testers on Degree Works. We really appreciate all that you do to make sure the campus-wide tools we implement are as clean as they can be for the students and faculty.

Here’s the 2 URL’s you need.

**Degree Works application:**

http://webstert.umt.edu

**Degree Works Issue Reporting form:**

http://www.umt.edu/registrar/DegreeWorksIssueReporting.php

Please let Dana, Joe or Bonnie know if you need any assistance accessing the tools. As Dana mentioned, he'll do his best to get back to you within a day or so on the issues you find.

Julie Cannon
Director of Technology Tools