Degree Works University Access Training Manual

August 25, 2009
Revision 1

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Introduction to DegreeWorks

DegreeWorks is a web-based advisement tool which can be used as a road map towards students' graduation. DegreeWorks matches students' academic and course history against the degree requirements as defined in the Undergraduate or Graduate Catalog. It can also provide specific guidance on recommended future course requirements. Advisors can use the tool to evaluate students' progress and alignment of their program of study to their academic and career goals.

Who has access to DegreeWorks?

- Student who have been enrolled within the last year
- Advising Staff
- Faculty/Advisors
- Registrar
- Degree Audit Specialists
- Appropriate Staff

What are the benefits of DegreeWorks?

- Available via the web 24/7.
- Learn the degree requirements and identify the courses you must complete to earn your degree.
- Learn, before you change your major officially, how the courses you have completed meet the new major requirements.
- See how courses that you want to take in the future will apply to your degree requirements.
- View the Schedule of Classes and select courses for next semester or session.
- Learn about the course including description and pre/co-requisites for which you want to register.

- Estimate how many semesters it will take you to graduate.

How does my DegreeWorks audit differ from my transcript?

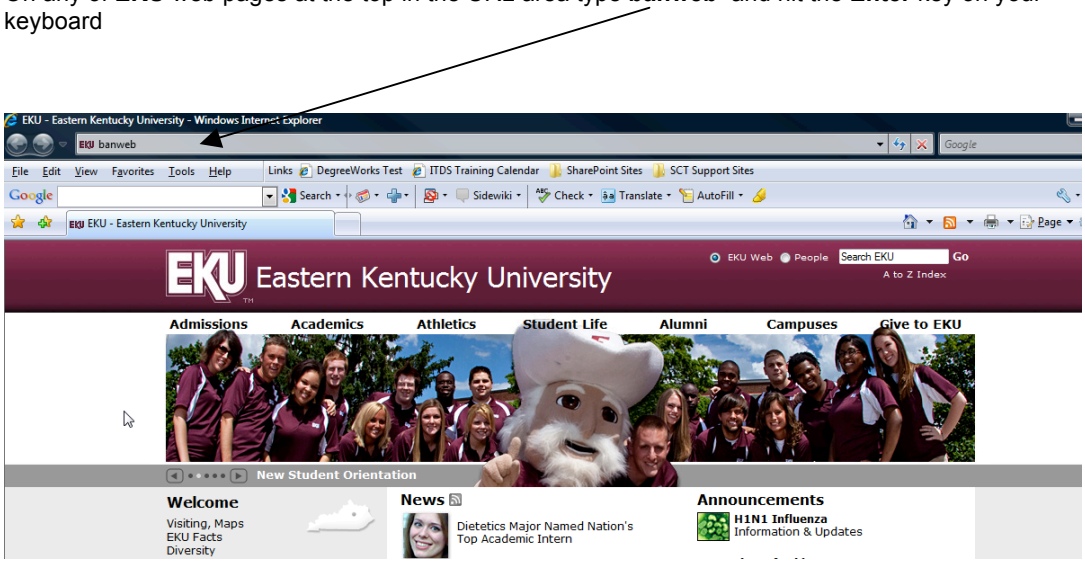
- DegreeWorks is a computerized program that displays courses required and completed in the major.
- Your transcript is the official college record listing the courses taken each semester.
- DegreeWorks allows you to print an advisement audit used strictly for advisement purposes.
- To obtain an official transcript you must request it from the Registrar's Office in SSB 239 or online thru your EKU Direct Account, then, Student Services & Financial Aid Tab, then, Request Official Transcript.

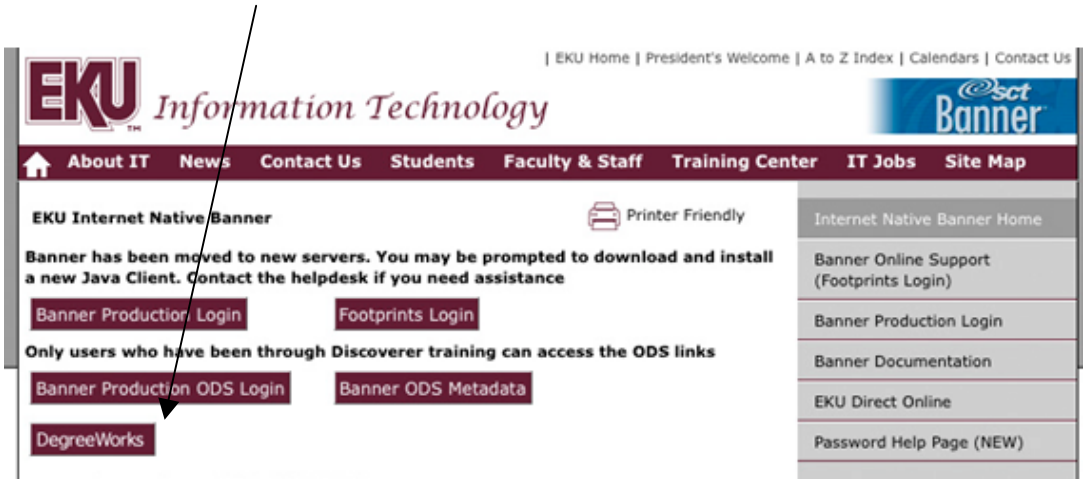
Accessing DegreeWorks

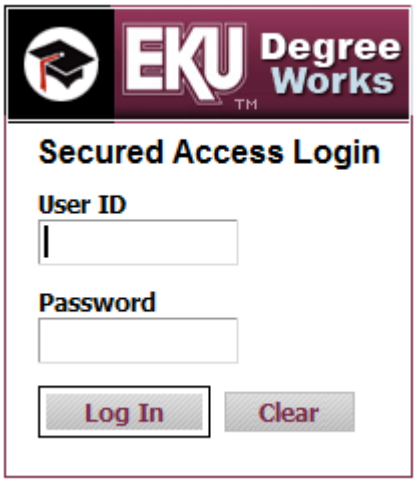
In order to gain access to DegreeWorks, you must have a valid **User ID** and **Password**. Your User ID and Password determine what permissions you have as a DegreeWorks user. DegreeWorks uses these values to determine which screens you have access to, which functions are available on these screens and what information is displayed.

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.

Login to DegreeWorks via Web

Step	Action
1	On any of **EKU** web pages at the top in the URL area type **banweb** and hit the **Enter** key on your keyboard 

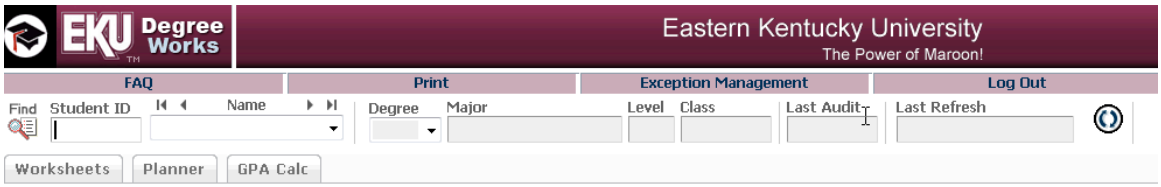
Step	Action
2	**Click** on the icon **DegreeWorks** 

Step	Action
3	**Enter** User ID and Password in the corresponding fields, then click **Login** **User ID =** EKUDirect ID number **Password =** EKUDirect Password 

DegreeWorks Introduction Page

This page contains brief information about the DegreeWorks functions available. The top of the page contains several buttons. These buttons are FAQ, Print, Exception Management, and Log Out.

All data fields along the top of the screen shot below are gray except for the **Name** field and **Student ID** field. Gray fields are non-selectable and cannot be used for search queries. White fields, such as the student ID field shown below are active fields.



For students, DegreeWorks:

- Provides real-time advice and counsel
- Speeds time to graduation
- Provides intuitive web access to self-service capabilities
- Streamlines the graduation process
- Allows direct access to multiple related services and advice through hyperlinks to catalog information, class schedules, transcripts, help desk services, and FAQs

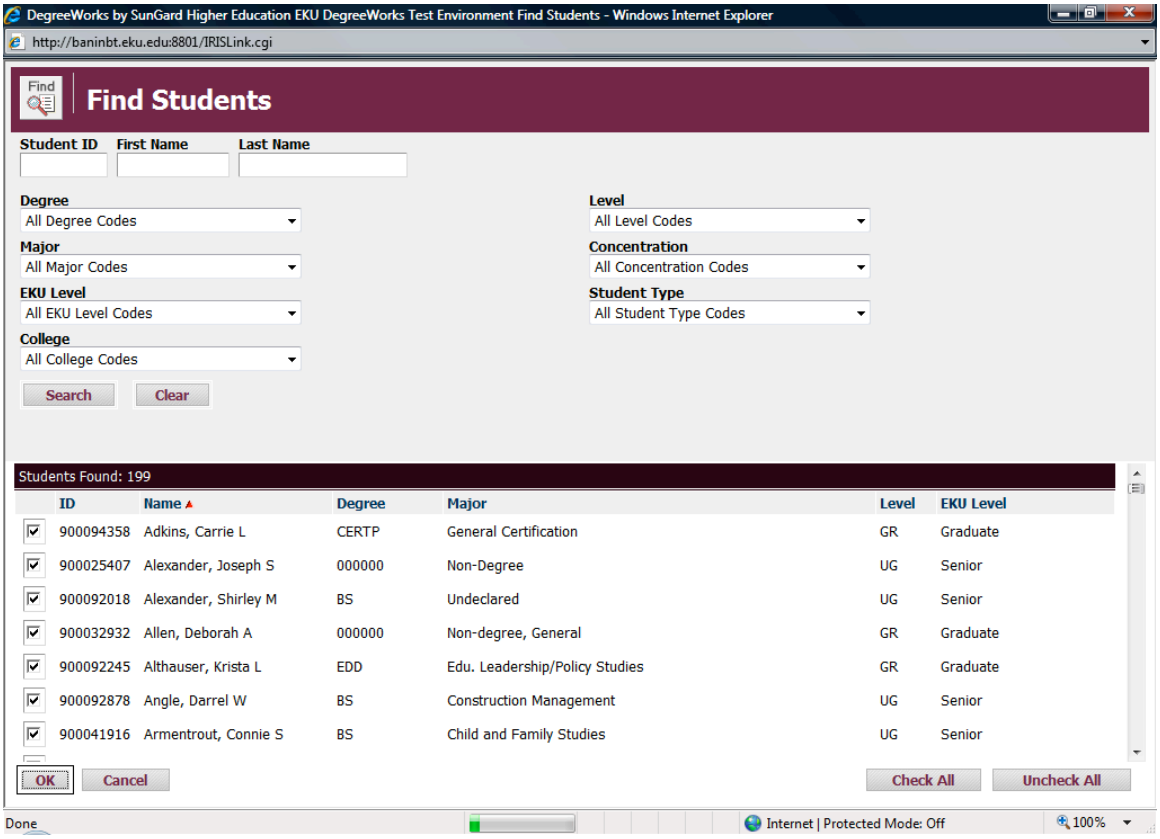
For advisors, DegreeWorks:

- Supports real-time delivery of academic advice through intuitive web interfaces
- Minimizes errors through consistent degree plans
- Supports more timely degree certification
- Reduces paperwork and manual program check sheets
- Supports and monitors unique program changes

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 DegreeWorks screen. This will take you to the Find Students search page. This page (shown below) can be used to select an individual student using student ID, first or last name, or a group of students defined by other selection criteria.

Note: Wildcard (@) can be used as part of the search string in the Student ID, Last or First Name. Example: A search for "WE@" in the Last Name field will produce a list of all students who contain "WE" as the first two characters of their last name.



Students can be selected based upon their Degree, Major, EKU Level, College, Concentration, Student Type, 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.

Once the list has appeared you have two options:

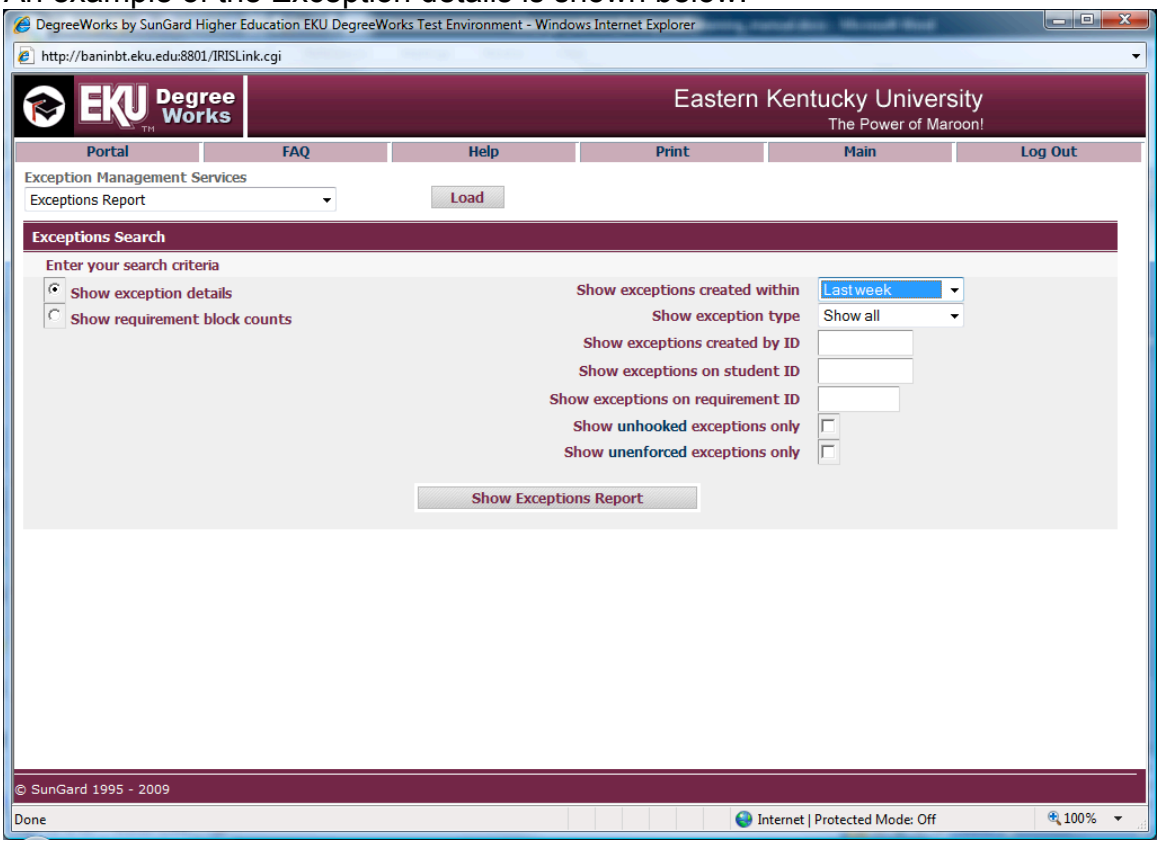
- Leave all checked select OK and the list of students will appear in the audit mode.
- To select a single student click on Uncheck All, then select the student, click OK

Exception Management

The Exceptions report service allows users having access to this function to query the database and create reports on the number and type of exceptions processed. You can search for exceptions created by an individual, exceptions applied for a particular student, or exceptions applied within a specific block.

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. There are two types of exception reports: details or block counts.

An example of the Exception details is shown below.



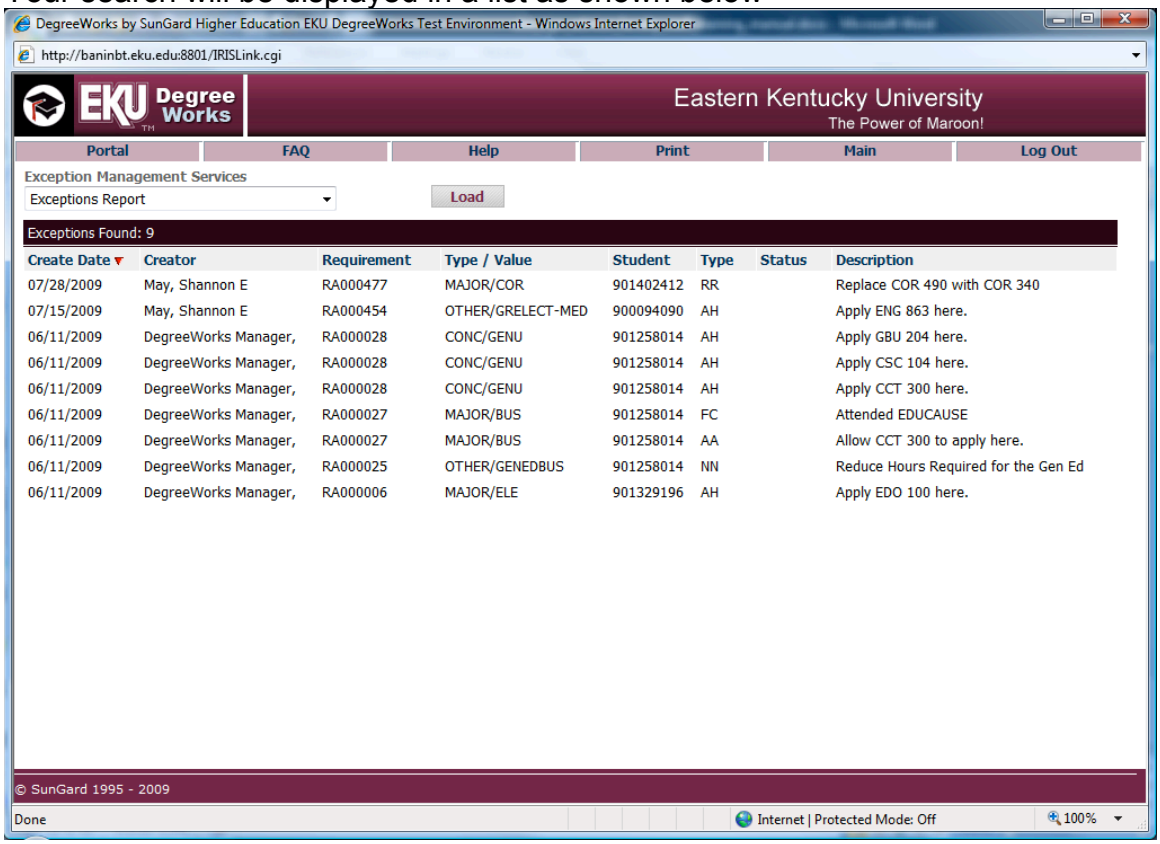
Enter your search criteria

- Show exception details – select to view all exception details
- Show exceptions created within – select date range to use from drop-down list
- Show exceptions type – chose type of exception from the drop-down list
- Show exceptions created by ID – Leave Blank
- Show exceptions on Student ID – Leave Blank to see all or enter student ID to see only a specific student's exceptions. Wildcards can be used in this field to select a group of students.

- Show exceptions on requirement ID – Leave Blank
- Show unhooked exception only – Do not check
- Shoe unenforced exception only – Do not check

Click on Show Exception Report

Your search will be displayed in a list as shown below

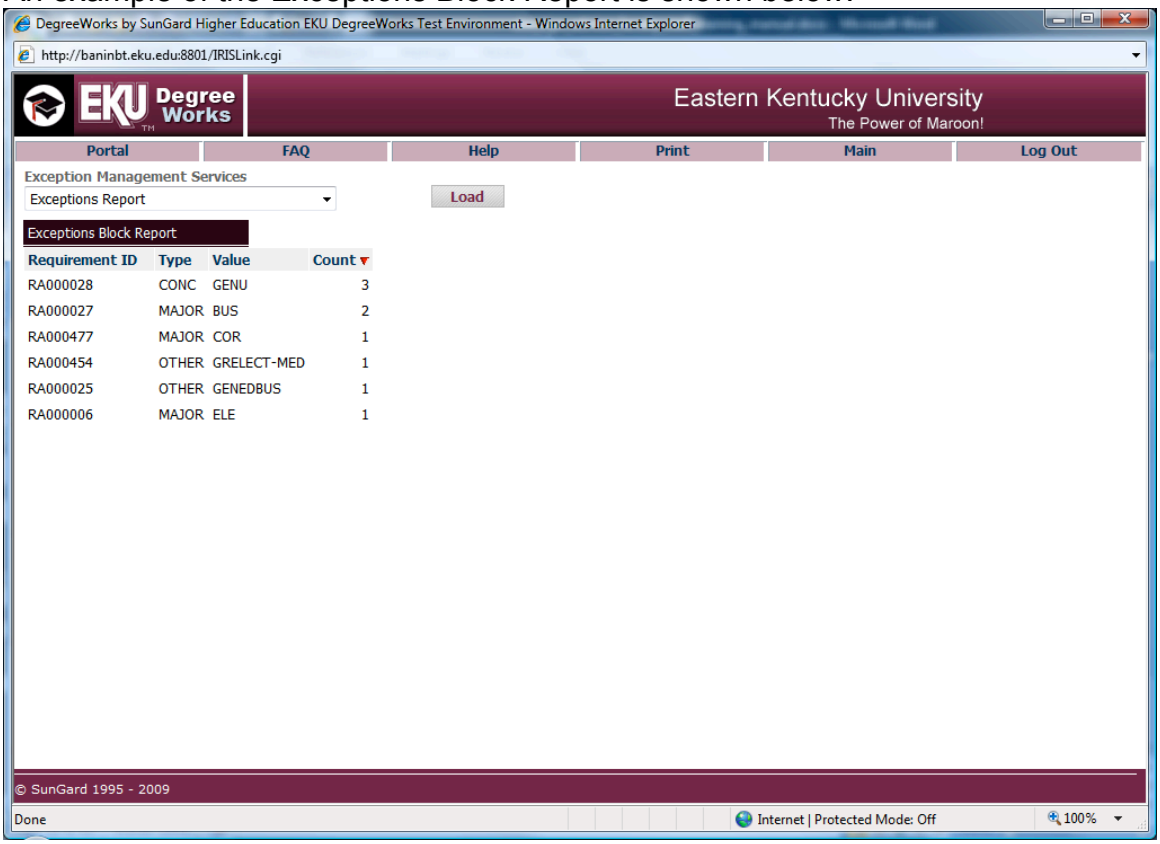


The red arrow in the Create Date column indicates that the current report results are sorted in descending order by create date. The search results can be sorted by any of the columns displayed. Simply click the header label for the column you wish to use as your sort and the list will sort based upon 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 form a down arrow to an up arrow.

Click on the **Load** button to return to the search criteria, if you wish to perform another search.

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 block counts option button on the Exceptions Search page prior to processing your query.

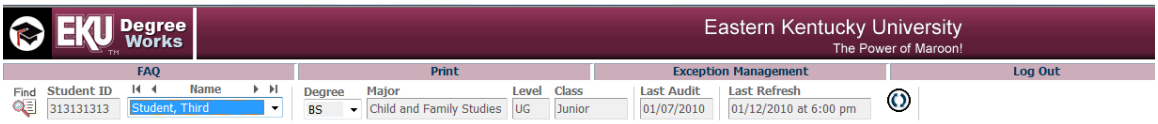
An example of the Exceptions Block Report is shown below.



DegreeWorks Introduction

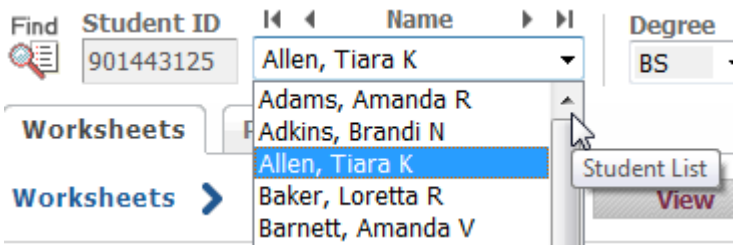
The top of the page contains several buttons. These buttons are FAQ, Print, Exception Management, and Log Out.

All data fields along the top of the screen shot below are gray except for the **Name** field. Gray fields are non-selectable and cannot be used for search queries. White fields, such as the student ID field shown below are active fields.

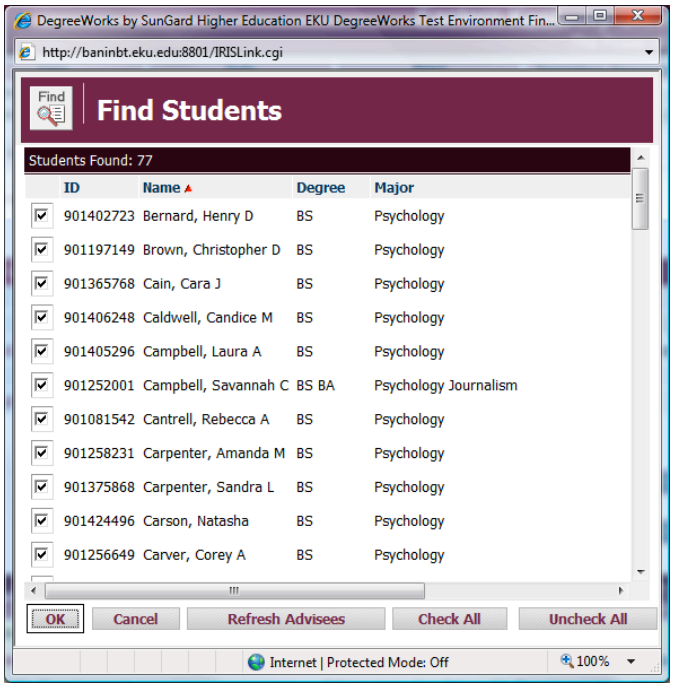


Upon entering Degree Works you will be viewing the students assigned to you as advisees in ABC order.

In order to see individual student's information you will use the drop down button on the **Name** field. Highlight the student name and the audit will appear.



You may also use the **Find** button in the upper left hand corner of the DegreeWorks screen to see a listing of students. This view will take you to the Find Student search page. This page (shown below) will list the assigned advisees by student ID, first or last name, degree, and major.



Use the scroll bars to navigate in the bottom window. Only your assigned advisee will appear.

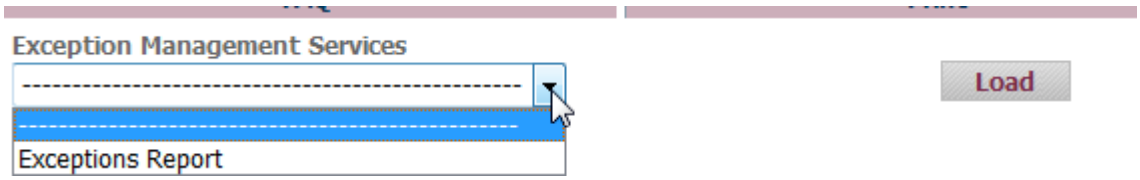
Once the list has appeared you have several options:

- Leave all checked select OK and the list of students will appear in the audit mode.
- To select a single student click on Uncheck All, then select the student, click OK
- Click on Refresh Advisees if a change has been made to your list

Exception Management

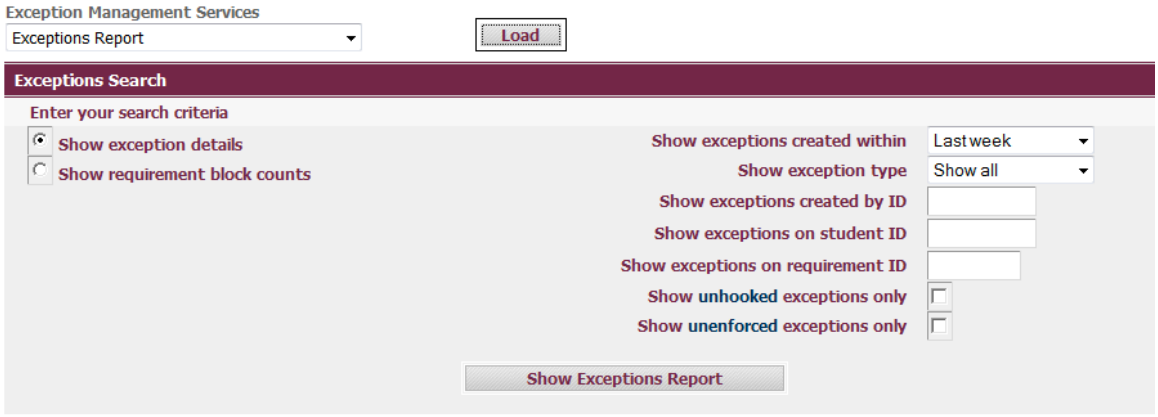
The Exceptions report service allows users having access to this function to query the database and create reports on the number and type of exceptions processed. You can search for exceptions created by an individual, exceptions applied for a particular student, or exceptions applied within a specific block.

To create an exception report, select the Exceptions Report item from the Exception Management Services drop-down list then click **Load**.



This will bring up the Exceptions Search screen shown below. There are two types of exception reports: details or block counts.

An example of the Exception details is shown below.



Enter your search criteria

- Show exception details – select to view all exception details
- Show exceptions created within – select date range to use from drop-down list
- Show exceptions type – chose type of exception from the drop-down list
- Show exceptions created by ID – Leave Blank
- Show exceptions on Student ID – Leave Blank to see all or enter student ID to see only a specific student's exceptions. Wildcards can be used in this field to select a group of students.
- Show exceptions on requirement ID – Leave Blank
- Show unhooked exception only – Do not check
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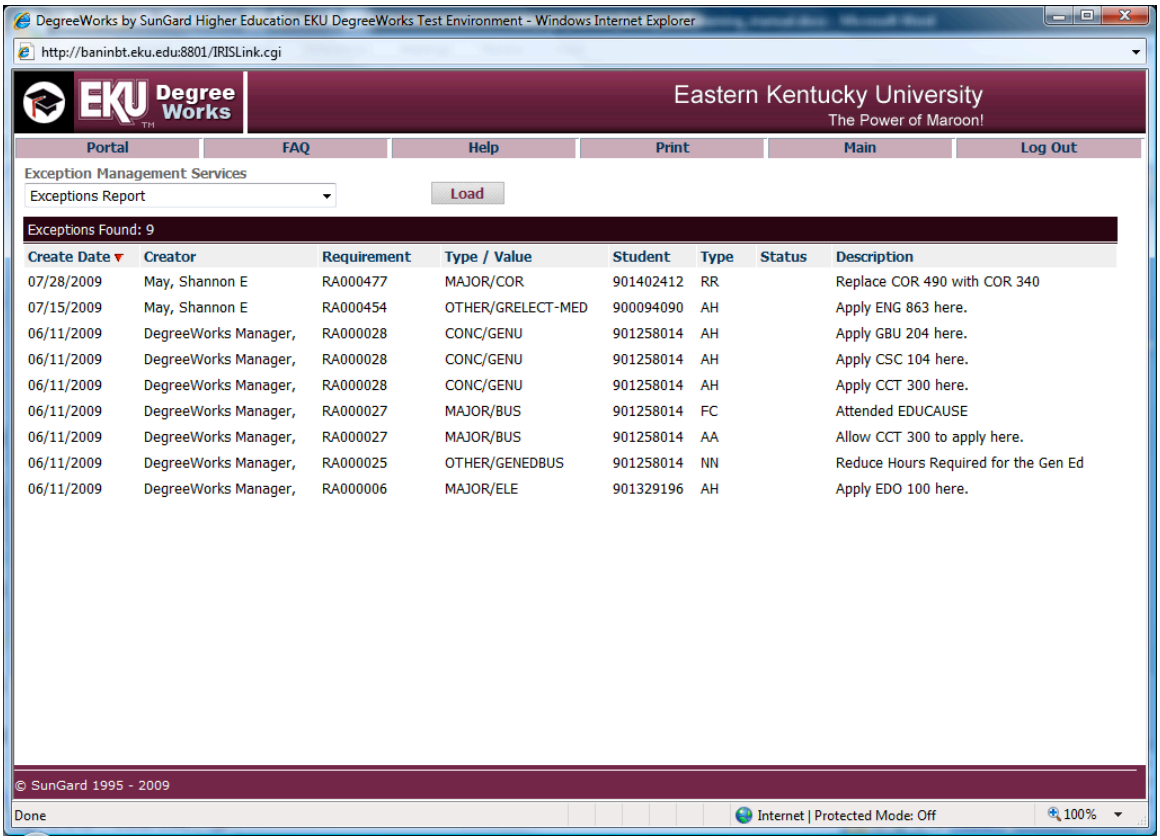
Click on Show Exception Report

Your search will be displayed in a list as shown below



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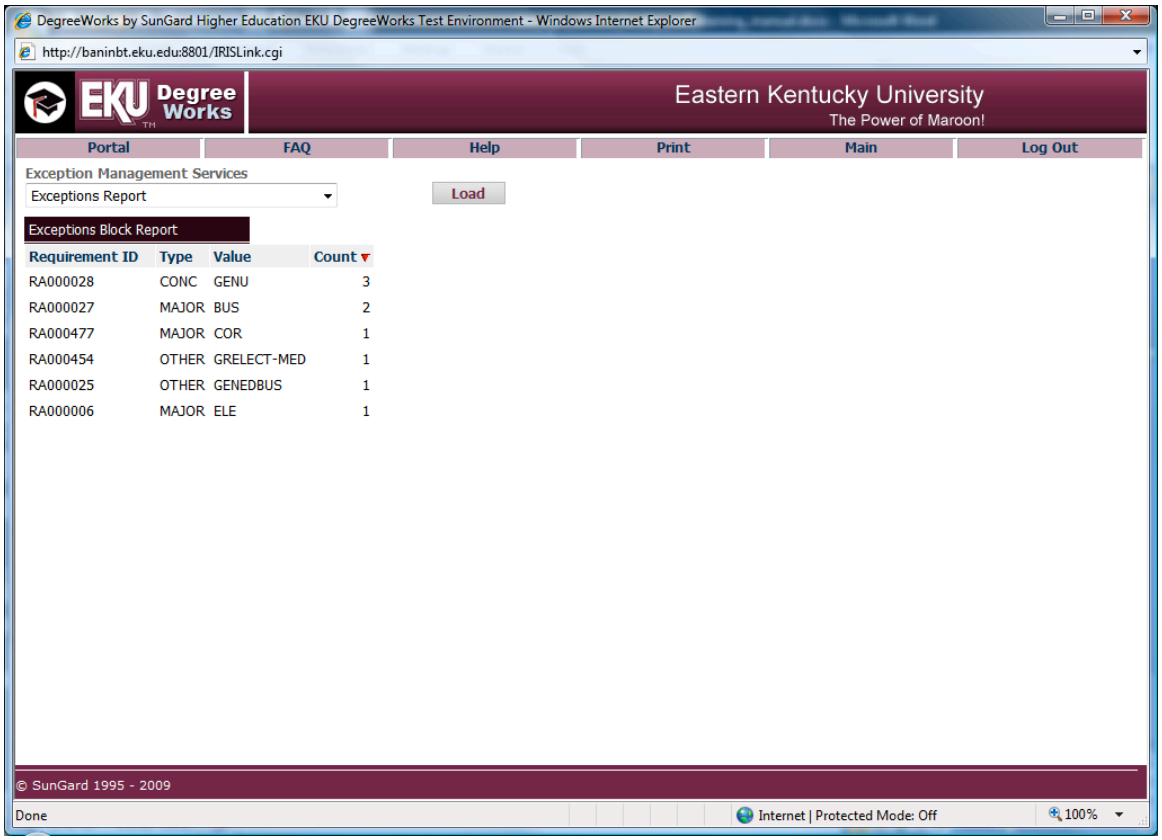
Click on the **Load** button to return to the search criteria, if you wish to perform another search.

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 block counts option button on the Exceptions Search page prior to processing your query.

An example of the Exceptions Block Report is shown below.


DegreeWorks by SunGard Higher Education EKU DegreeWorks Test Environment - Windows Internet Explorer
http://baninbt.eku.edu:8801/IRISLink.cgi
EKU Degree Works
Eastern Kentucky University
The Power of Maroon!
Portal
FAQ
Help
Print
Main
Log Out
Exception Management Services
Exceptions Report
Load
Exceptions Block Report
Requirement ID
Type
Value
Count
RA000028 CONC GENU 3
RA000027 MAJOR BUS 2
RA000477 MAJOR COR 1
RA000454 OTHER GRELECT-MED 1
RA000025 OTHER GENEDBUS 1
RA000006 MAJOR ELE 1
© SunGard 1995 - 2009
Done
Internet | Protected Mode: Off
100%

Overview of Web Functions

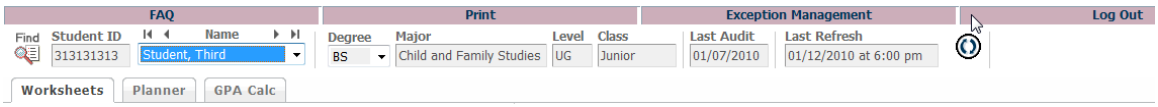
Once a student has been selected either using the drop down list under the **Name** or using the **Find Students** search page, you can chose the appropriate tab to run or review audits, edit the Planner, or perform GPA calculations.

Each DegreeWorks 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.

The time and date the data for this student was last refreshed from the Banner student system can be seen under the **Last Refresh** label as show below.

The time and date that a student's audit was last refreshed within the DegreeWorks system can be seen under the **Last Audit** label as show below.

Steps to manually refresh student information will be shown later as well as how to run a new audit.



What Does a DegreeWorks Audit Look Like?

Degree audits are processed using the Worksheet 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 demographic information will be displayed in the fields at the top of the window. This information includes Student Name, EKU ID, Classification, Advisors, Overall GPA, EKU GPA, Academic Standing, ACT Scores (when available), Level, Degree, College, Major, Minor, Concentration and the date the last audit was processed. It is recommended that you process a new audit for your student ID by selecting the **Process New** button each time you enter DegreeWorks.

Detailed Advice Block

This section of the audit contains student's demographic information,

EKU DegreeWorks Test Environment

Student View AA140733 as of 01/07/2010 at 22:27			
Student	Student, Third	**Level**	Undergraduate
ID	313131313	**Degree**	Bachelor of Science
Classification	Junior	**College**	College of Health Sciences
Advisors	Hinerman, James O Faculty, First Faculty, First	**Major**	Child and Family Studies
Overall GPA	2.93	**Minor**	Social Institutions and Change
EKU GPA	2.93	**Concentration**	Child Development
Academic Standing	Good Academic Standing	**ACT English**	0012
ACT Math	0017	**ACT Reading**	0019
ACT Science Reasoning	0023	**ACT Composite**	0018

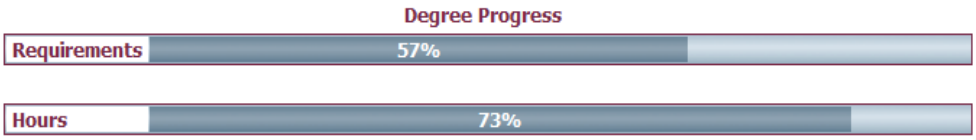
Note: *The Detailed Advice Block information comes directly from Banner. If incorrect follow normal procedures to change information in Banner.*

Degree Progress

This section of the audit contains information concerning the student's progress based on the degree seeking or "What If" scenario allowing the student to view requirements and hours percentage completed.

Requirement Bar = the percentage (%) of requirements completed for the current degree, major, minor, and concentration the student is seeking.

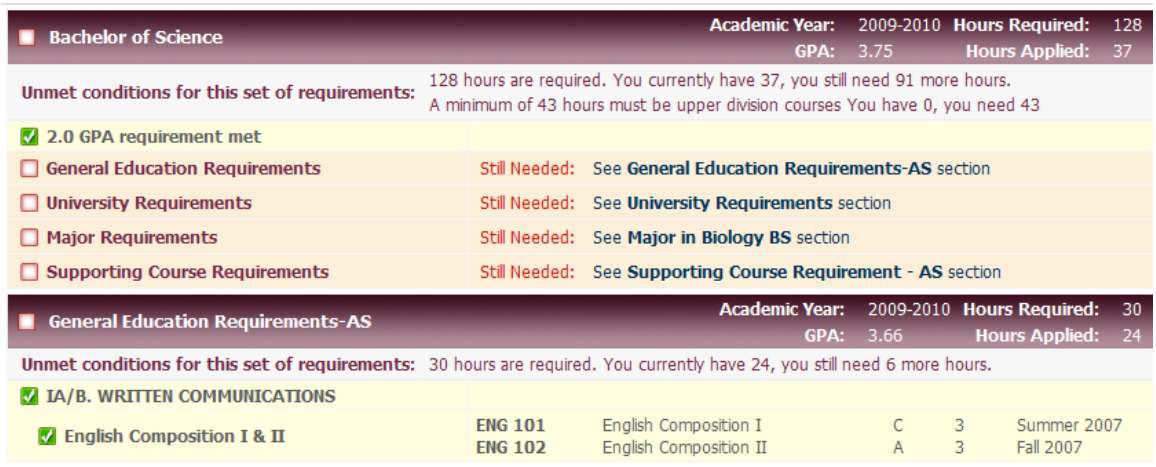
Hours Bar = the percentage (%) of all hours completed by the students.



Note: *The Hours Bar could have a bigger percentage (%) completed then the Requirements Bar if the student has taken hours that are not part of the current degree, major, minor, or concentration requirements the student is seeking.*

Degree Requirement Blocks

This section of the audit contains information concerning the student's degree requirements. These block allows you to verify the degree seeking, academic year, hours required, hours applied, and GPA, as well as, the overall requirements to complete the degree the student is seeking. (i.e. general education, university, major, minor, concentration/emphasis/option, etc)



☑ IC. ORAL COMMUNICATIONS	CMS 210	Public Speaking	A	3	Summer 2008
☑ II. Exempt					
≈ III. ARTS & HUMANITIES					
≈ ARTS & HUMANITIES OPTION I					
≈ IIIA. Arts	ART 200	Art Appreciation: Orientation	RG	(3)	Fall 2009
☑ IIIB. Humanities	ENG 211	Survey of World Literature I	A	3	Spring 2009
☑ IVA. Exempt					
☑ IVB. Exempt					
☐ V. SOCIAL & BEHAVIORAL SCIENCES					
☐ VA. History	Still Needed:	**1** Class in **ANT** 200 or **HIS** 202 or 203 or 204W^ or 231 or 232 or 246 or 247 or **HON** 210			
☑ VB. Social & Behavioral Science	SOC 131	Introductory Sociology	A	3	Spring 2008
≈ VC. History or Social & Behavioral Science	PSY 200	Introduction to Psychology	RG	(3)	Fall 2009
☐ VI. WELLNESS	Still Needed:	**1** Class in **BIO** 310^ or **HEA** 385 or **NFA** 201 or **PHE** 180			
☐ VII. BREADTH OF KNOWLEDGE	Still Needed:	Choose from 1 of the following:			
☑ Arts & Humanities	ENG 212	Survey of World Literature II	A	3	Summer 2008
☐ NATURAL SCIENCES		(Choose from 1 of the following:) or			
☐ Introduction to Physical Anthropology		(**1** Class in **ANT** 201) or			
☐ Introductory Astronomy		(**1** Class in **AST** 130^) or			
☐ Introductory Astronomy		(**1** Class in **AST** 135^) or			
☐ Stars, Blackholes: The Cosmos		(**1** Class in **AST** 330^) or			
☐ Human Anatomy		(**1** Class in **BIO** 171^) or			
☐ Clinical Microbiology		(**1** Class in **BIO** 273^) or			
☐ Human Physiology		(**1** Class in **BIO** 301^) or			
☐ Human Heredity & Society		(**1** Class in **BIO** 303^) or			
☐ Conservation of Wildlife Resources		(**1** Class in **BIO** 317^) or			
☐ Inquiry Chemistry for Teachers		(**1** Class in **CHE** 100^) or			
☐ Introductory Chemistry II		(**1** Class in **CHE** 102^) or			
☐ Chemistry in Everyday Life/Lab		(**2** Classes in **CHE** 101^ and 107^) or			
☐ General Chemistry II/Lab		(**2** Classes in **CHE** 112^ and 112HL^) or			
☐ Introduction to Physical Geography		(**1** Class in **GEO** 210) or			
☐ Earth Science for Teachers		(**1** Class in **GLY** 102^) or			
☐ Gold & Diamonds		(**1** Class in **GLY** 107^) or			
☐ Plate Tectonics: The Active Earth		(**1** Class in **GLY** 108^) or			
☐ Great Moments in Earth History		(**1** Class in **GLY** 109^) or			
☐ Geology & Human Health		(**1** Class in **GLY** 172^) or			
☐ Earth Science		(**1** Class in **GLY** 302^) or			
☐ Global Environmental Challenges		(**1** Class in **GLY** 303) or			
☐ The World Ocean		(**1** Class in **GLY** 304^) or			
☐ Dinosaurs		(**1** Class in **GLY** 305^) or			
☐ Special Topics		(**1** Class in **HON** 316) or			
☐ Science & Society		(**1** Class in **NAT** 380^) or			
☐ Concepts of the Physical World		(**1** Class in **PHY** 101^) or			
☐ Inquiry Physics for Teachers		(**1** Class in **PHY** 102^) or			

☐ College Physics I	(**1** Class in **PHY** 131^) or
☐ College Physics II	(**1** Class in **PHY** 132^) or
☐ University Physics I	(**1** Class in **PHY** 201^) or
☐ University Physics II	(**1** Class in **PHY** 202^)
☐ Social & Behavioral Sciences	(**1** Class in **AFA** 202 or **ANT** 120 or 200 or **COM** 200 or **ECO** 120^ or 130^ or 230^ or 231^ or **HIS** 202 or 203 or 204W^ or 231 or 232 or 246 or 247 or 310 or **HON** 210 or 311 or 312 or **GEO** 100 or 220 or **POL** 100 or 101 or 212 or 220 or 301 or **PSY** 200 or 200W^ or 280^ or 280W^ or 300^ or 300W^ or **SOC** 131 or 235)
☑ VIII.Exempt	

☐ University Requirements — Academic Year: 2009-2010 — GPA: 0.00

☑ Academic Orientation	
☐ Writing Intensive Course	Still Needed: **1** Class in **@** @W

☐ Major in Biology BS — Academic Year: 2009-2010 — Hours Required: 35 — GPA: 0.00 — Hours Applied: 0

Unmet conditions for this set of requirements: 35 or 36 hours are required. You currently have 0, you still need 35 more hours.

☐ Principles of Biology	Still Needed: **1** Class in **BIO** 121^
☐ General Botany	Still Needed: **1** Class in **BIO** 131^
☐ General Zoology	Still Needed: **1** Class in **BIO** 141^
☐ Genetics	Still Needed: **1** Class in **BIO** 315^
☐ Ecology	Still Needed: **1** Class in **BIO** 316^
☐ Principles of Microbiology	Still Needed: **1** Class in **BIO** 320^
☐ Plant or Animal Physiology	Still Needed: **1** Class in **BIO** 328^ or 348^
☐ Biology Seminar	Still Needed: **1** Class in **BIO** 490
☐ Evolution	Still Needed: **1** Class in **BIO** 514^
☐ Upper Division Biology Electives	Still Needed: **1** Class in **BIO** 3@ or 4@ or 5@
☐ Option Required	Still Needed: See **Aquatic Biology Option** section

☐ Aquatic Biology Option — Academic Year: 2009-2010 — Hours Required: 15 — GPA: 0.00 — Hours Applied: 0

Unmet conditions for this set of requirements: 15 hours are required. You currently have 0, you still need 15 more hours.

☐ Aquatic and Wetland Plants	Still Needed: **1** Class in **BIO** 525^
☐ Freshwater Invertebrates	Still Needed: **1** Class in **BIO** 542^
☐ Ichthyology	Still Needed: **1** Class in **BIO** 557^
☐ Freshwater Ecology	Still Needed: **1** Class in **BIO** 558^
☐ Aquatic Biology Electives	Still Needed: **1** Class in **BIO** 340^ or 556^ or 561^

Supporting Course Requirement - AS	Academic Year: 2009-2010 Hours Required: 32 GPA: 0.00 Hours Applied: 0
Unmet conditions for this set of requirements:	32-33 hours are required. You currently have 0, you still need 32 more hours.
SUPPORTING COURSE REQUIREMENTS	
General Chemistry I/Lab	Still Needed: **2** Classes in **CHE** 111^ and 111L^
GENERAL CHEMISTRY CLASS	Still Needed: Choose from 1 of the following:
General Chemistry II/Lab	(**2** Classes in **CHE** 112^ and 112HL^) or
General Chemistry II/Hon.Lab	(**2** Classes in **CHE** 112^ and 112HL^)
Organic Chemistry I/Lab	Still Needed: **1** Class in **CHE** 361^
Organic Chemistry II	Still Needed: **1** Class in **CHE** 362^
Organic Chemistry Lab I	Still Needed: **1** Class in **CHE** 361L^
Organic Chemistry Lab II	Still Needed: **1** Class in **CHE** 362L^
Calculus I or Calculus with Applic for Sci I	Still Needed: **1** Class in **MAT** 124^ or 261^
College Physics I	Still Needed: **1** Class in **PHY** 131^
College Physics II	Still Needed: **1** Class in **PHY** 132^
Statistics Electives	Still Needed: **1** Class in **STA** 215^ or 270^

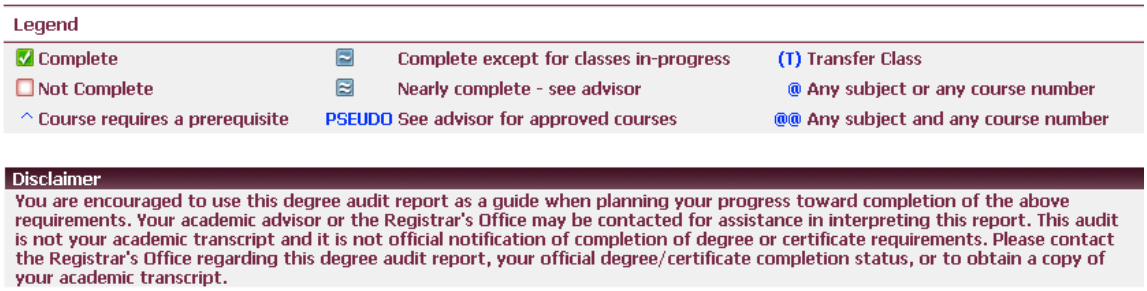
Other Requirement Blocks

This section of the audit contains information concerning the student's Additional Free Electives, Insufficient, In-progress and Not Counted Courses.

Additional Free Electives				Hours Applied: 75 Classes Applied: 27
AGR 1T07	KYUK : ASC101	B	3	Fall 2005
Satisfied by:	- University Of Kentucky			
AGR 1T08	KYUK : ASC102	C	3	Spring 2006
Satisfied by:	- University Of Kentucky			
Insufficient				**Hours Applied: 0 Classes Applied: 7**
BIO 171	KYLEXCC : ANA209	W	0	Fall 2007
Satisfied by:	- Bluegrass Community & Tech Col			
BIO 1T01	KYLEXCC : BIO150	F	0	Spring 2007
Satisfied by:	- Bluegrass Community & Tech Col			
In-progress				**Hours Applied: 24 Classes Applied: 9**
BTS 300	MMAC-Professional Skills	RG	0	Fall 2009
ECO 231	Principles of Economics II	RG	3	Fall 2009
FIN 300	Business Finance I	RG	3	Fall 2009
FIN 300	Business Finance I	RG	3	Spring 2010
MGT 320	Human Resource Management	RG	3	Fall 2009
MGT 370	Operations Management	RG	3	Spring 2010
MGT 400	Organization Theory	RG	3	Fall 2009
MGT 425	Compensation Management	RG	3	Spring 2010
MGT 445	Employee Recruit and Selection	RG	3	Spring 2010
Not Counted				**Hours Applied: 18 Classes Applied: 6**
ACC 201	Introduction to Financial Acc	C	3	Fall 2008
ACC 202	Introduction to Managerial Acc	C	3	Fall 2008
CIS 212	KYLEXCC : CIT105	B	3	Spring 2007
Satisfied by:	- Bluegrass Community & Tech Col			
FIN 300	Business Finance I	RG	3	Fall 2009
FIN 300	Business Finance I	RG	3	Spring 2010
GBU 204	Legal/Ethical Environ. of Bus.	B	3	Fall 2008

Legend & Disclaimer

This section is informational only. Explains the legend on the audit report and the disclaimer is a notification that this audit is not the official transcript.



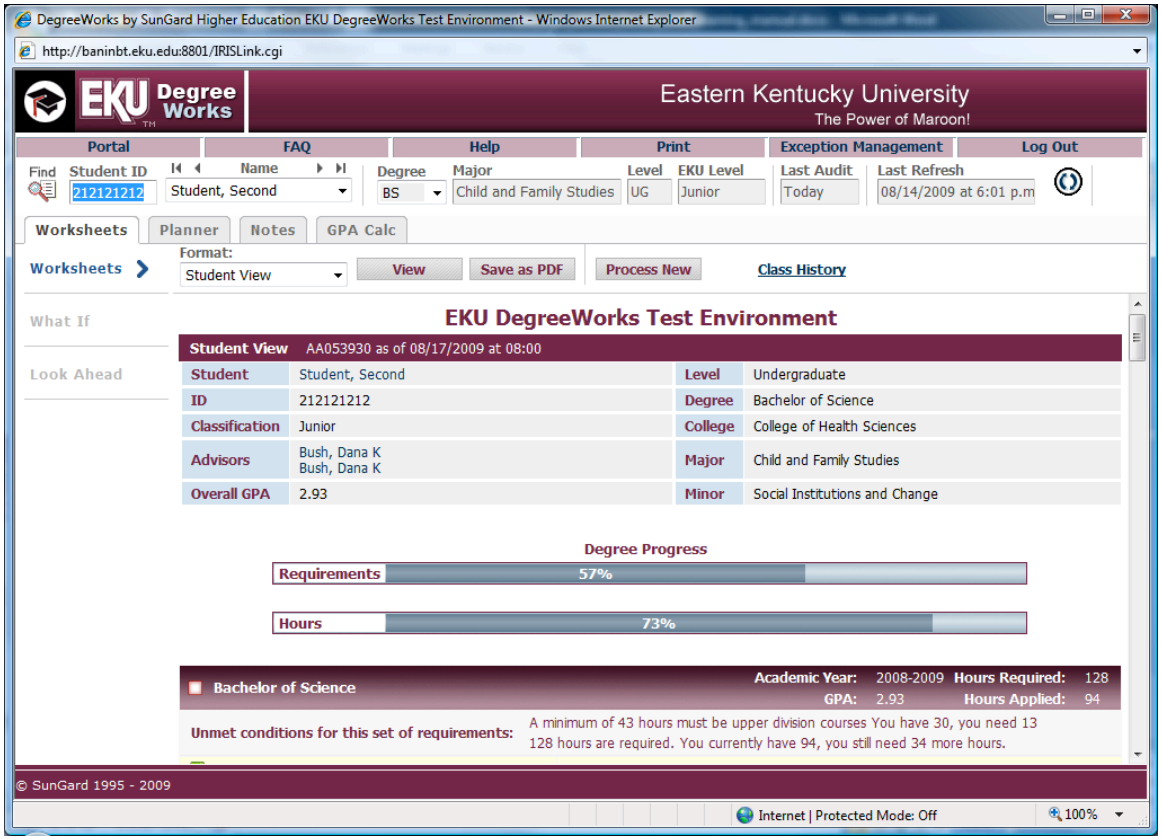
Processing Degree Audits

Degree audits are processed using the Worksheet tab. To access this screen, select the student you wish to process. This will automatically take you to the Worksheets tab and the most recent audit will load automatically. At this point you have three (3) audit options to view.

Worksheet Tab Options

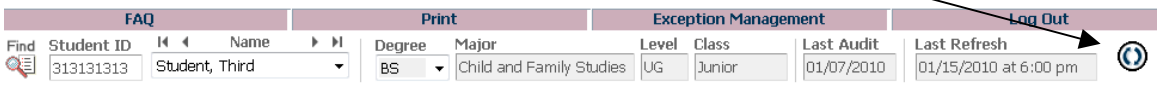
- **Worksheets** – Most recent audit for the student will load automatically.
- **What-If** – Allows students and advisors to process speculative degree audits using the student's current class history.
- **Look Ahead** – Allows students and advisors to view audits showing coureses for which the student *Plans* to register in the future terms

Worksheets Audits View

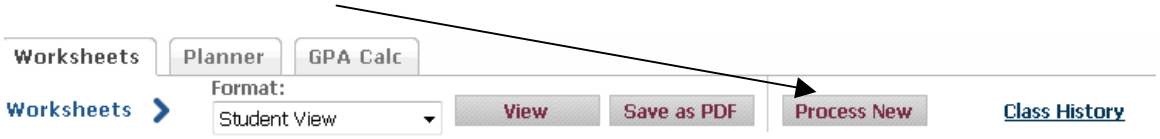


Each time that you view/open a student's audit in DegreeWorks it is recommended that you **Refresh** the student's data from Banner then **Process New** a student audit.

1. An audit will appear in Student View. Click on the **Refresh** button



2. Click on the **Process New** button.



Once the above steps have been completed you will view the most current audit. It displays students' degree process based on the student's major on file.

You will also have the opportunity to view the students **Class History** (taken & registered) if needed.

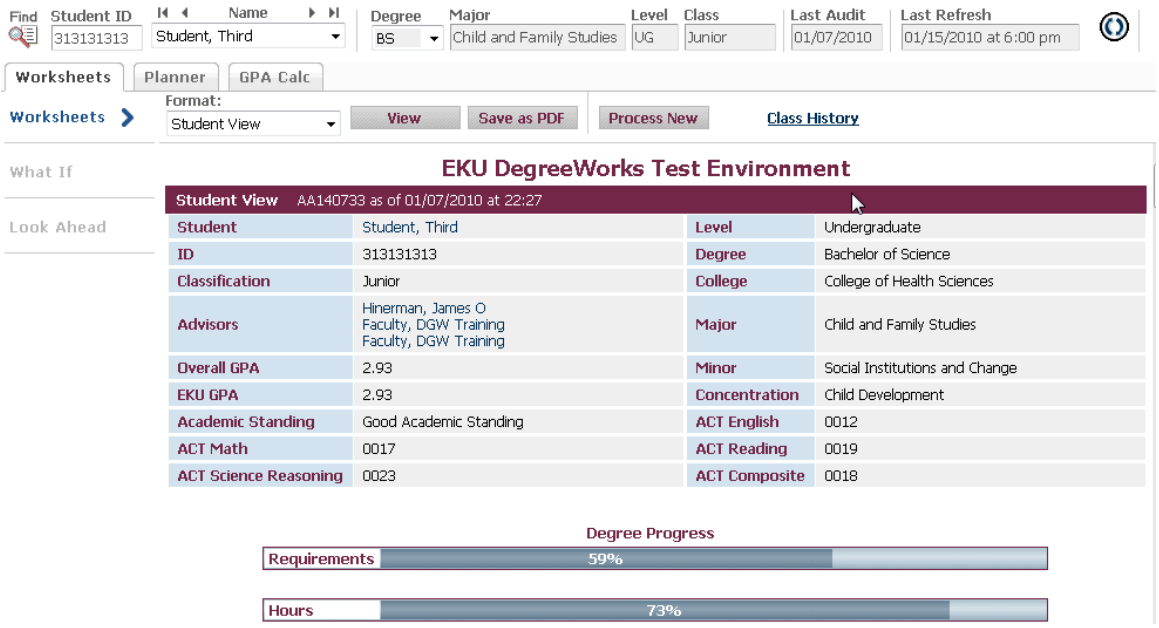
Worksheets Audits Options

- **Student View** – Full audit view of academic history
- **Graduation Checklist** – Quick tool designed to assist with college graduation checkout
- **Registration Checklist** – Quick guide of student's unmeet requirements
- **Class History** - The students and advisors also have the opportunity to view a class history by term (taken & registered).

Student View

This is a full audit view of the academic history for the student. This is subject to frequent changes based on add, drop and completed courses. This view is not recommend for printing but can be saved as a PDF file if needed.

Most recent audit for the student should load automatically. Make sure the **Format: Student View** is showing. If not select and click on **View** button.

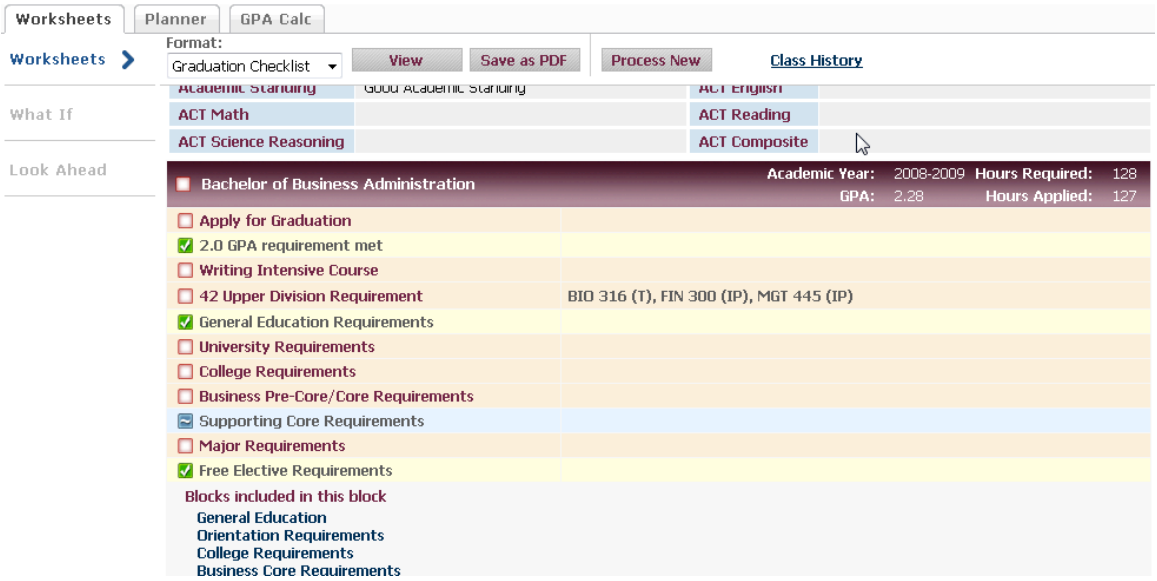


Note: *Both the Student and Advisor have access to the Student View.*

Graduation Checklist

The Graduation Checklist is a quick tool designed to assist the colleges with graduation checkout. The Advisor will be able to see what requirements have been completed and what areas are remaining to complete for graduation.

Change the format view to **Format: Graduation Checklist** and click on the **View** button.

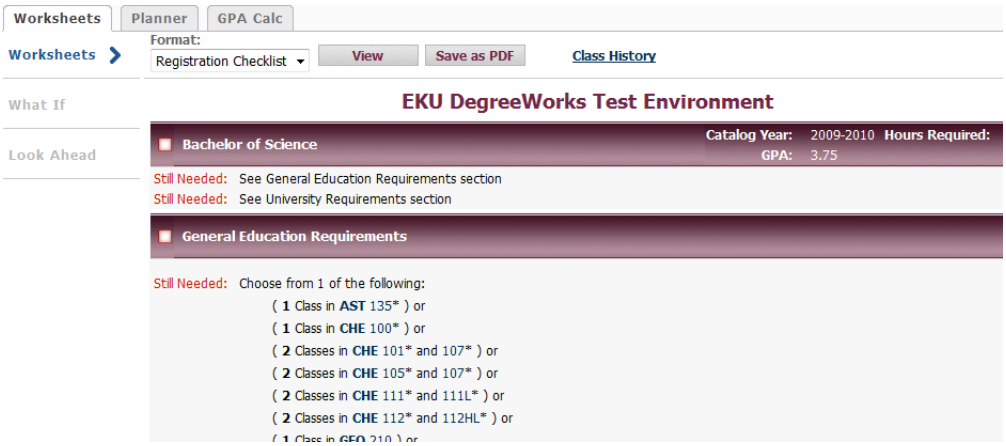


Note: *Only the Advisors have access to the Graduation Checklist view.*

Registration Checklist

The Registration Checklist is a quick guide for students and advisors to view their unmeet requirements. This is view is recommend to be printed and brought to Advising session.

Change the format view to **Format: Registration Checklist** and click on the **View** button.

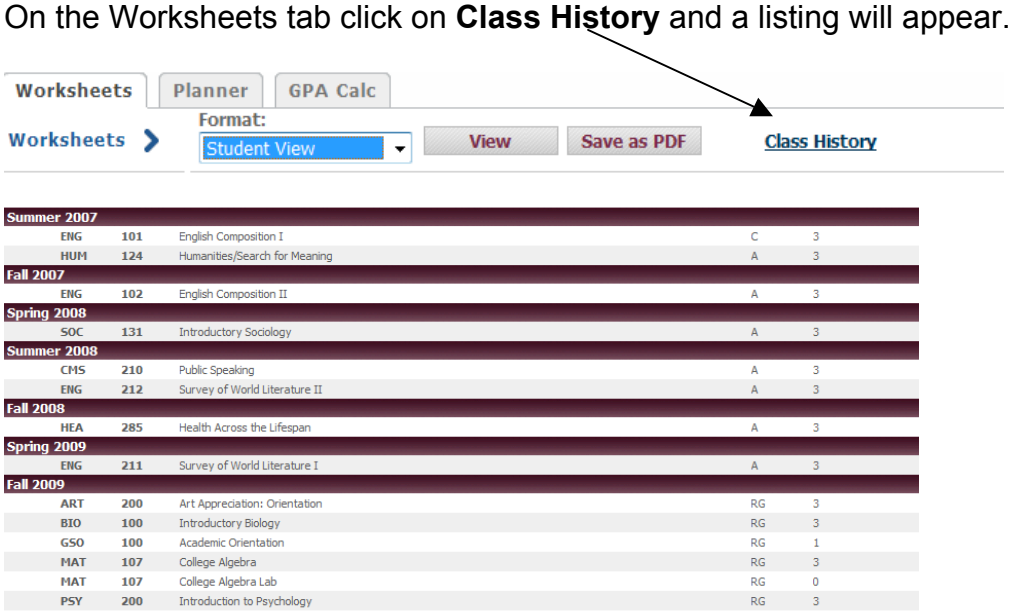


Note: *Both the Student and Advisor have access to the Registration Checklist View.*

Class History

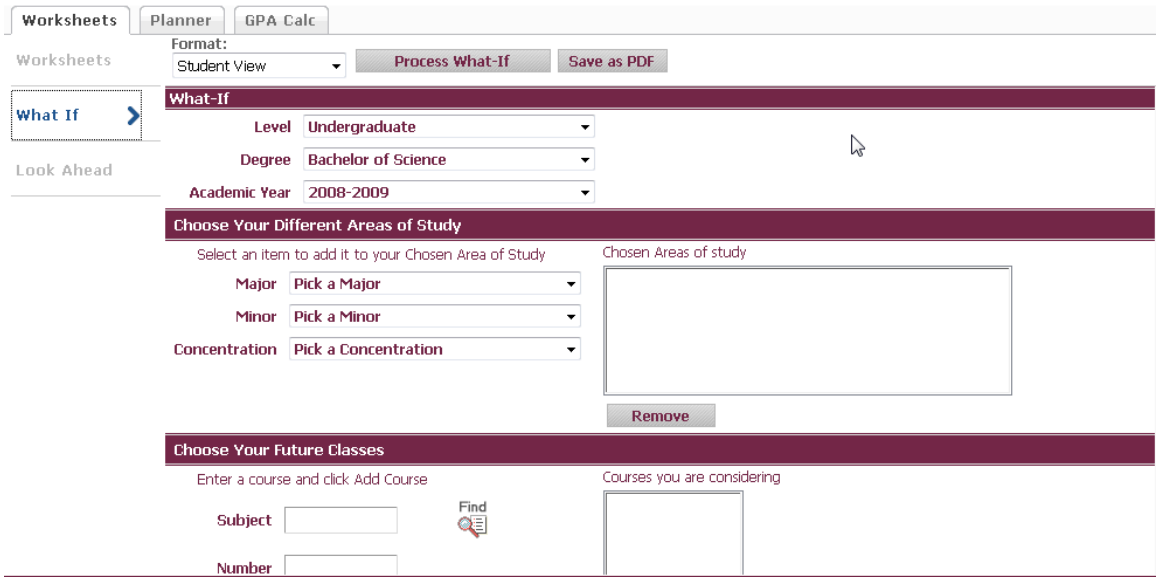
The students and advisors also have the opportunity to view a **Class History** by term (taken & registered).

On the Worksheets tab click on **Class History** and a listing will appear.



Note: *To print this page hit CTRL P on your keyboard.*

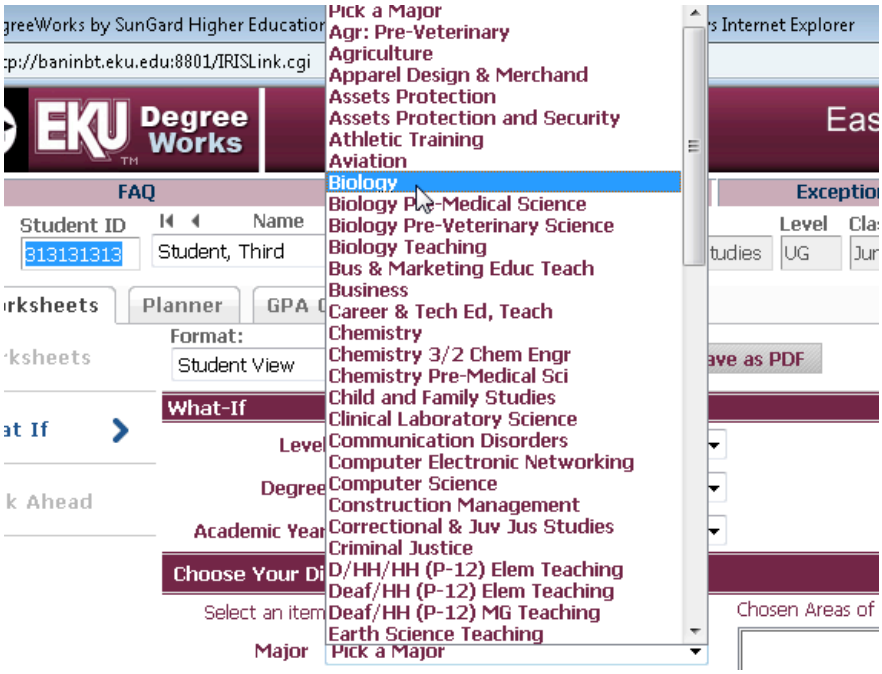
What – If Audits



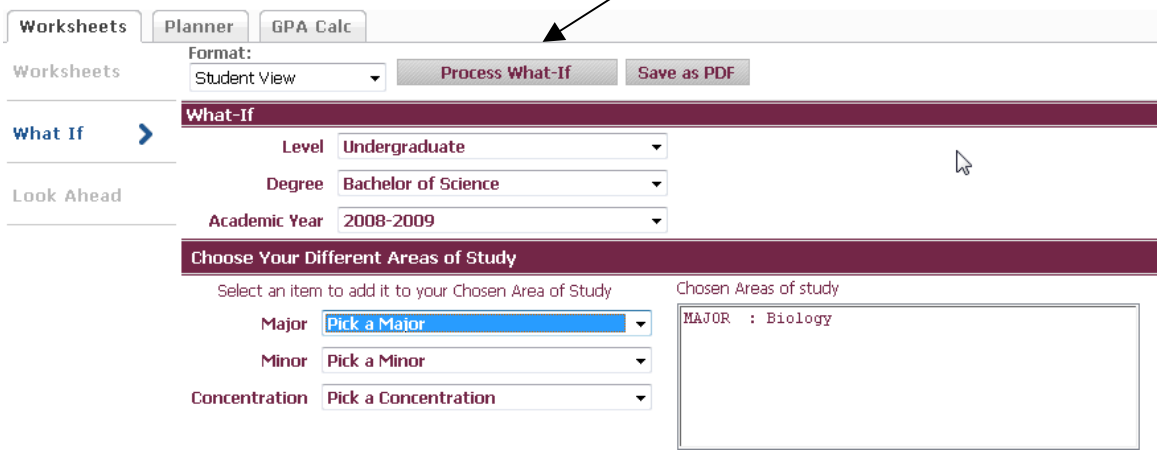
What-If audits allow you to process speculative degree audits for a student using their current class history. You can use this tab if the student is thinking of

changing their major and would like to know where they stand in the new curriculum.

To generate a What-If degree audit, select the requirements the students wish to audit against using the drop down menu. Click on the “What-If” Level, Degree, and Academic Year. Choose the “What-If” Major, Minor, and Concentration and the selected items will be moved to the window on the right.



Once the selections have been made click **Process What-If** to view the new audit.

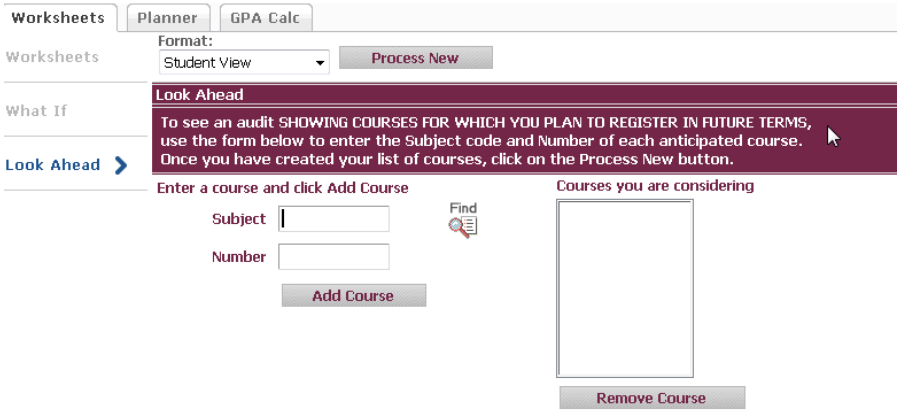


When generating the requirement criteria for a What-If audit, it is important to make sure the only valid combinations are entered in the requirement selection

criteria drop-down list boxes. For example, if the Philosophy major can only be completed with a Bachelor of Arts degree, choosing Philosophy in the Major drop-down list box and Bachelor of Science in the Degree field represents and invalid combination and will generate an incomplete audit.

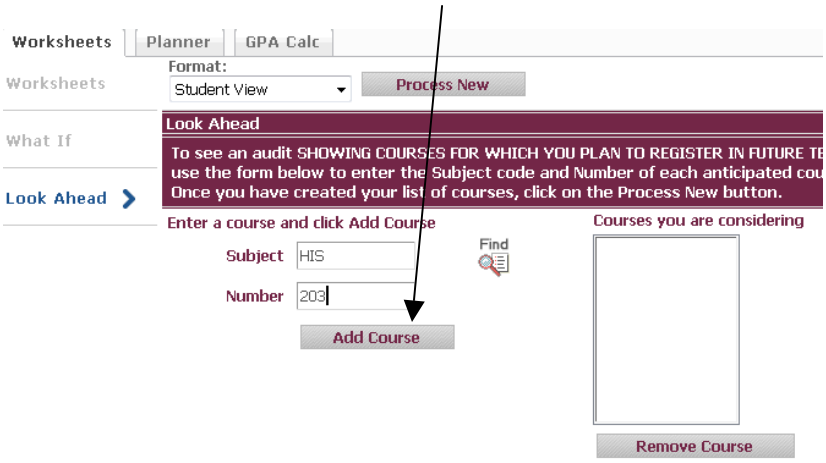
It is important to remember that What-If audits are not stored in the database. After they are run, the results can be printed, but after leaving the What-If screen the audit cannot be accessed again. It is always possible to run another What-If audit with the same parameters.

Look Ahead Audits

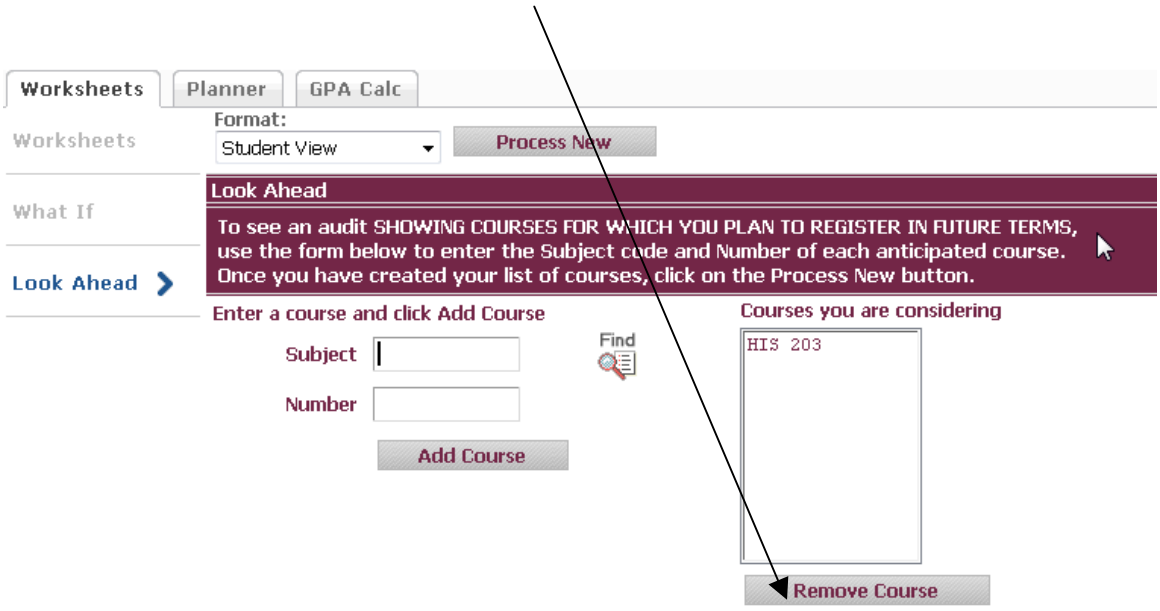


Allows students to view audits showing coureses for which the student *Plans* to register in the future terms

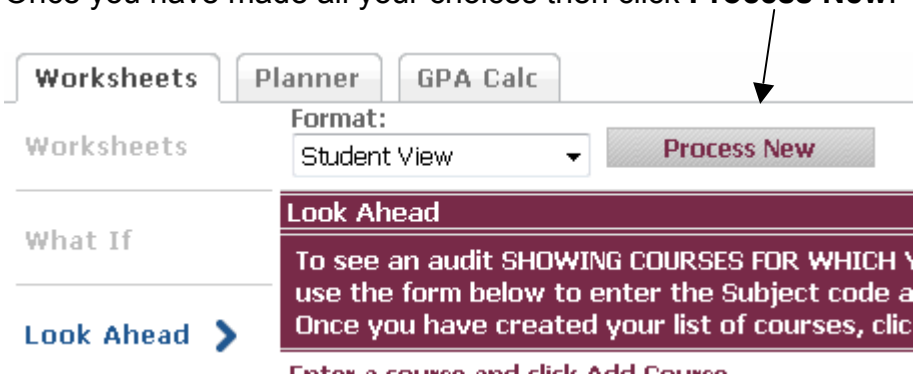
Enter the course and click **Add Course.**



The course can be removed once selected and before Process New has been completed by clicking on **Remove Course.**

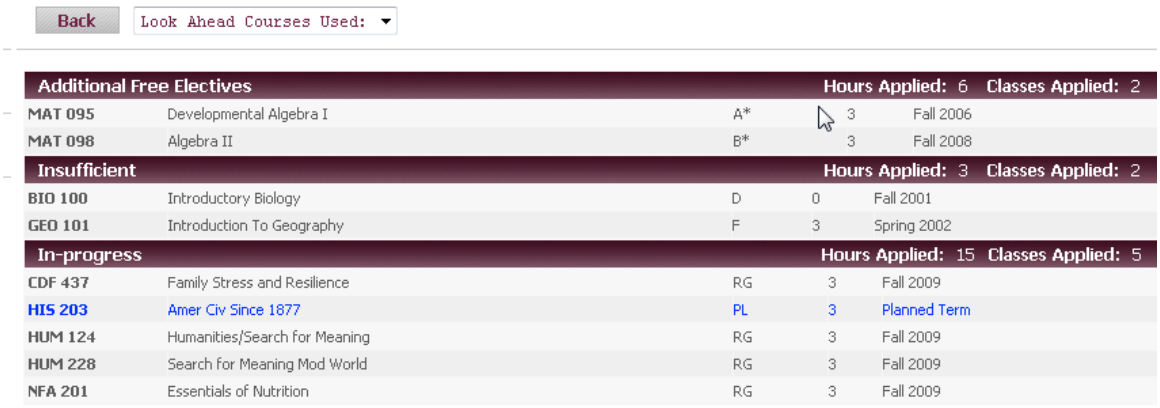


Once you have made all your choices then click **Process New**.



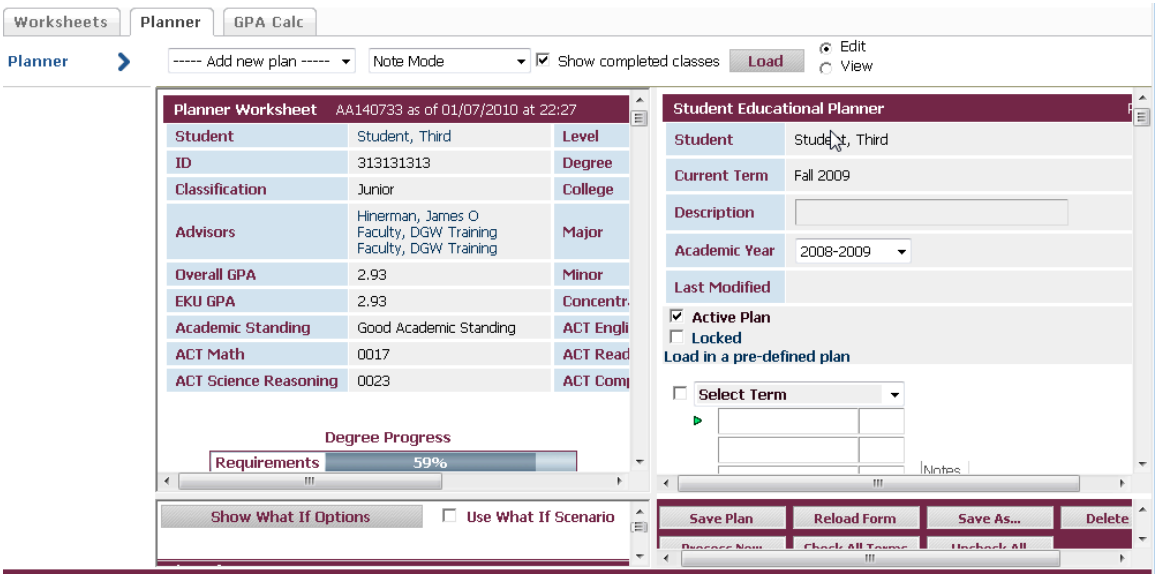
An updated audit will appear with the Plan information to review. The course that was selected will appear in the area that fulfils the requirement

If the Plan information does not fit a requirement then it will appear at the bottom of the audit in either Additional Free Electives, In-progress and Not Counted Courses

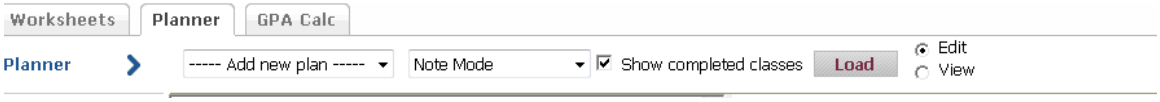


Student Educational Planner

The Student Educational Planner (SEP) is a tool in DegreeWorks 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-n-drop action.

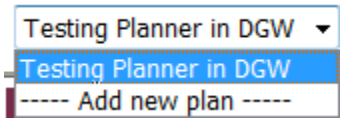


Planner Controls



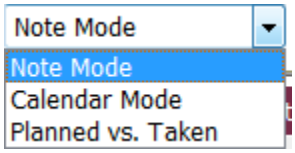
Plan list

- 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

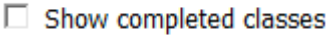
- Notes mode – terms are listed top to bottom with notes for each terms and advisor notes at the bottom (not recommended for print)
- Calendar mode – each "academic year" of terms is a row with advisor notes at the bottom (recommended for print if needed)
- Planned vs. Taken – compare planned courses to those actually taken by the student



Note: *The Note Mode is the default. If you wish to view Calendar Mode or Planned vs. Taken Mode highlight then click on the Load button.*

Show completed classes

- For past terms and current term allows classes taken to be shown instead of those planned
- If checked, it will not allow modification of past terms. This guards against saving completed courses into Planned terms



Load

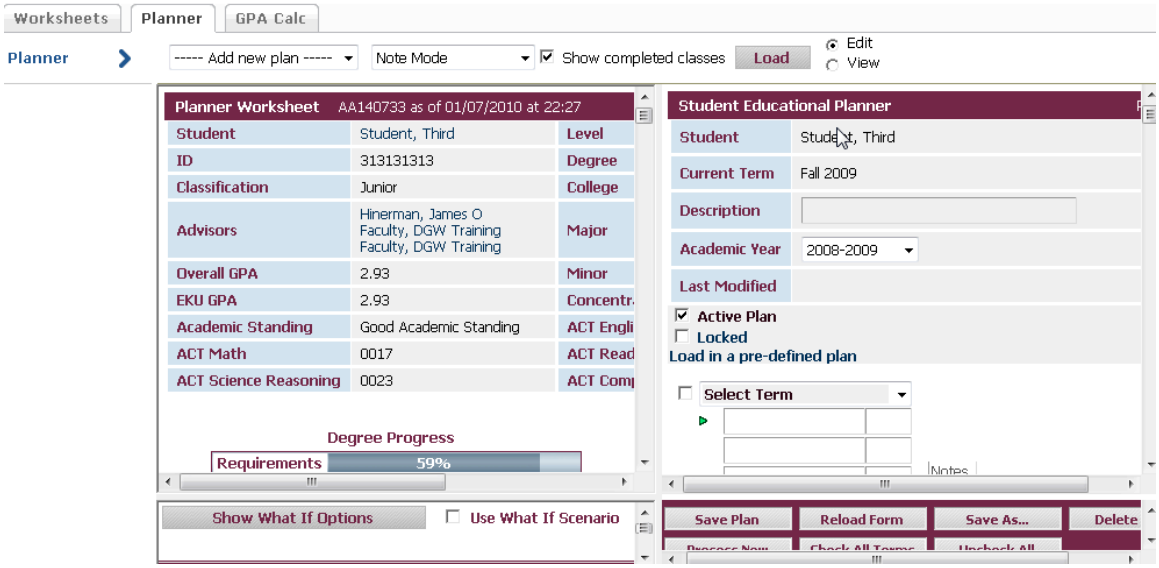
- Engine button used to produce a plan audit

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

Planner Body

Planner "Edit"



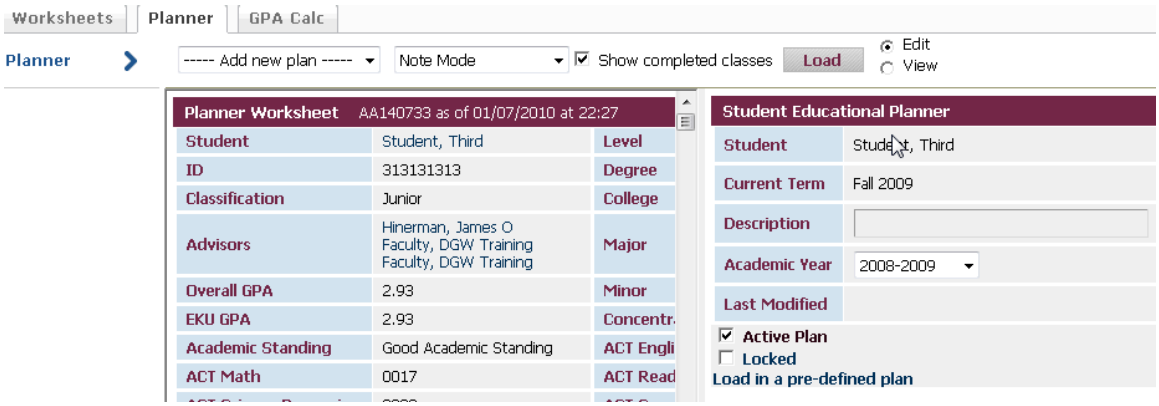
1. Degree Audit appears in left frame
2. Plan appears in right frame
3. The left and right frames can be resized by dragging the gray separating bar
4. Classes taken and their grades are shown for completed terms based on the **Show completed classes** checkbox
5. Courses from the audit can be dropped into a plan using **drag-n drop** or by selecting **Load in a pre-defined plan** and choosing a pre-determine plan
6. 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)
7. If a user types a course into the plan clicking **Save Plan** will populate the credits field
8. 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
9. A total number of credits appear beneath each term and a plan total of credits appear at the bottom of the plan. Both sets of total credits are updated as the user makes changes
10. Plan buttons appear in the bottom right
    - **Save Plan** – saves contents of plan; this function will submit for approval
    - **Reload Form** – Not Activated
    - **Save As**…- save the data as a new plan
    - **Delete Plan** – delete this current plan- confirmation message appears
    - **Process New** – runs a new audit with planned courses applied to rules
    - **Check All Terms** – check the boxes for all future terms to be included in a new audit

- **Uncheck All** – uncheck all boxes for all future terms
- **Delete Plan** – deletes the plan that is loaded

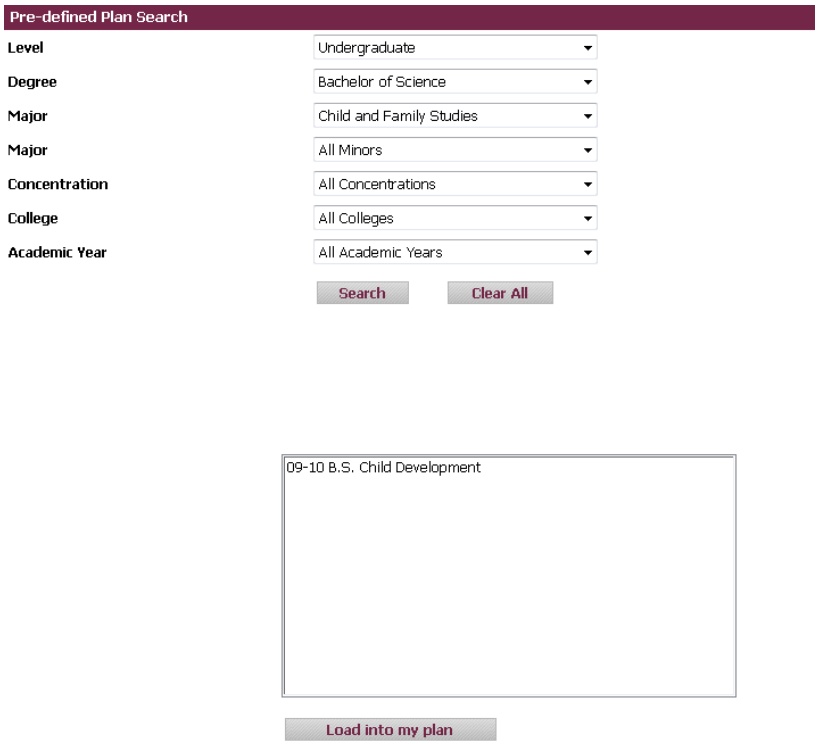
11. **Description** field is used to distinguish one plan from another if the student has multiple plans
12. **Academic Year** field is also helpful if the student has multiple plans but also useful for reporting purposes
13. **Active Plan –** Each student will need an Active Plan. Once one has been defined/loaded this box must be checked.
14. **Locked –** Once an agreed upon Plan has been loaded it will need to be locked. Previous Plan terms cannot be changed only future terms.
15. Clicking **Print** in the top-right of the plan frame prints just the plan frame

Loading a Pre-Defined Plan

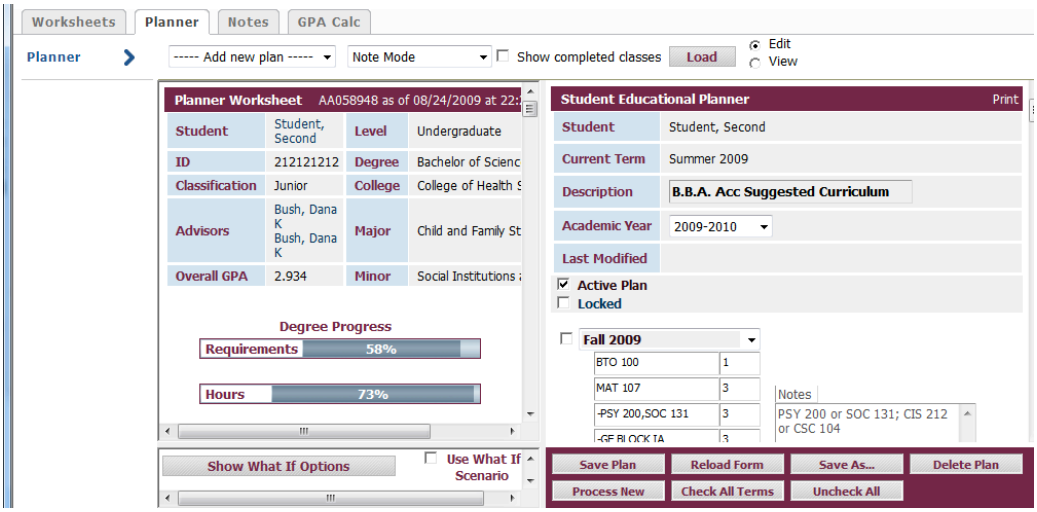
In some instances there are Pre-defined Plans for majors. These plans can be accessed by clicking the **Load in a pre-defined plan** button located on the Student Educational Planner under the Locking Status.



The School, Degree, Major, and Catalog Year default to the values found on the student's degree records. **Clear All** may be used to clear all fields. Either select the options you which to view using the drop-down windows or click on **Search** button to retrieve the pre-defined plan.



Highlight a pre-defined plan and click **Load into my plan** by doing so this will populate the template into the student's new plan.



After the window closes the template is populated into the student's new plan. The user must click **Save Plan** to save the new plan.

Quick Notes to finish Plan

1. Load a pre-defined plan or build a plan

2. Save Plan
3. Customize plan (drag & drop courses, delete courses)
4. Save Plan
5. Load
6. Click CHECK ALL TERMS
7. Click Process New
8. Review Student's Audit
9. Make Corrections to plan
10. Make notes at bottom for advisee
11. Click Process New
12. Put Check in Active field
13. Put Check in Lock field
14. Click Save Plan
15. **Calendar Mode** – Print this mode

General Planner Reminders

- Every Student must have an **Active and Locked Plan** for the duration of their time at EKU.
- Students cannot make change to an Active and Locked Plan.
- Student can **Save As** an Active and Locked Plan.
- Green Balloon = Student has taken all of the courses that were planned for the term (Balloon will not show up until the grades are posted for the term)
- Red Balloon = Student has not taken at least one of the courses that was planned for the term (Balloon will not show up until the grades are posted for the term)
- The Active/Locked Plan is the first one listed in the drop-down window of the plans.
- When you create a Plan SAVE often. Do not exit the planner until you save the plan. If you do exit before saving you will lose the plan you have been working on. You will NOT receive a warning to save. Moto is SAVE, SAVE, and SAVE again.
- Delete a Plan = make sure when you delete a plan to copy and save all Planning Notes that are applicable to the new plan. Make sure the plan you want to delete is the one that you are viewing. To copy notes highlight note with your mouse, hit the Ctrl C on your keyboard then go to the new plan under the Planning Notes area hit Ctrl V on your keyboard.
- Enter free text on a course line in a plan hit the dash the space on the keyboard enter information then enter the credit hours for this course (example: - Gen Ed Block VA)
- You can only have one Active/Locked Plan.
- You can have more than one Locked Plan.
- If student has more than 9 courses in term they click to the Plan vs. Taken to see all course. (example Music classes).

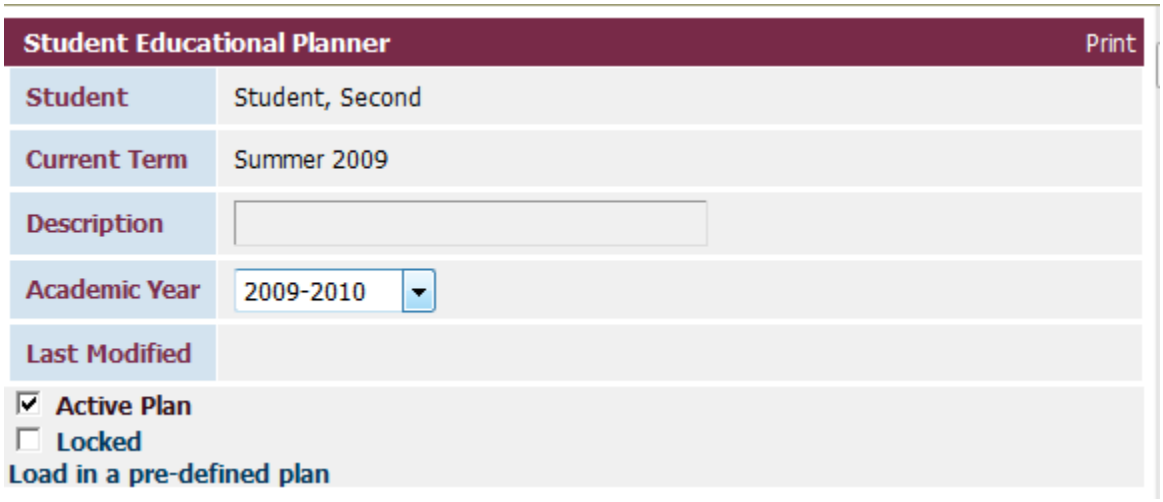
Planner Modes

Planner "Notes" Mode

Notes mode – terms are listed top to bottom with notes for each terms

Student Educational Planner Section

- Student Name
- Current Term
- Description – field is used to distinguish one plan from another if the student has multiple plans
- Academic Year - field is also helpful if the student has multiple plans but also useful for reporting purposes
- Last Modified – Day, month, year & who modified plan loaded
- Active Plan - Status of plan loaded
- Locked– Status of plan loaded
- Load in a pre-defined plan – select to choose a pre-defined plan
- Print - Allows you to print the plan



Term, Course, Hours, Notes Section

- Plan Term
- Course for each plan term
- Hours for each course within the plan term
- Notes if applicable for each plan term
- Plan Term total hours
- Plan grand total hours

Fall 2009	
Course	**Hours**
ART 200	3
BIO 100	3
GSO 100	1
MAT 107	3
PSY 200	3
	0
Total	**13**

Need to be thinking about what to declare as a major

Spring 2010	
Course	**Hours**
AST 135	3
ANT 200	3
AFA 201	3
CDF 232	3
	0
	0
Total	**12**

Need to decide which elective to take.

Plan Total	**25**

Classes Completed in Unplanned Terms Section

- Classes taken and their grades are shown for completed terms based on the **Show completed classes** checkbox

Classes Completed in Unplanned Terms

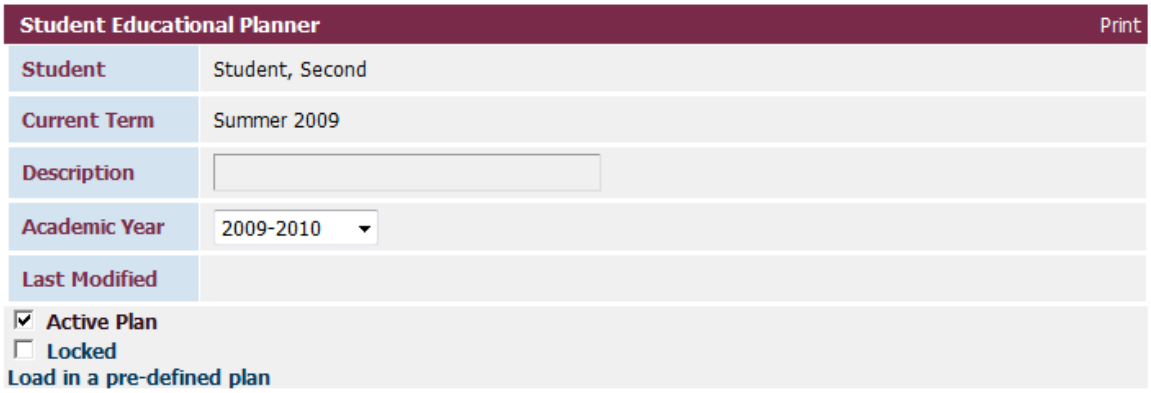
Term	Class	Grade
Summer 2007	ENG 101	C
	HUM 124	A
Fall 2007	ENG 102	A
Spring 2008	SOC 131	A
Summer 2008	CMS 210	A
	ENG 212	A
Fall 2008	HEA 285	A
Spring 2009	ENG 211	A

Planner "Calendar" Mode

Calendar mode – each "year" of terms is a row

Student Educational Planner Section

- Student Name
- Current Term
- Description – field is used to distinguish one plan from another if the student has multiple plans
- Academic Year - field is also helpful if the student has multiple plans but also useful for reporting purposes
- Last Modified – Day, month, year & who modified plan loaded
- Active Plan - Status of plan loaded
- Locked– Status of plan loaded
- Load in a pre-defined plan – select to choose a pre-defined plan
- Print - Allows you to print the plan



Term, Course, Hours, Notes Section

- Plan Term
- Course for each plan term
- Hours for each course within the plan term
- Plan Term total hours
- Plan grand total hours

Fall 2009		Spring 2010			
Course	**Hours**	**Course**	**Hours**	**Course**	**Hours**
ART 200	3	AST 135	3		0
BIO 100	3	ANT 200	3		0
GSO 100	1	AFA 201	3		0
MAT 107	3	CDF 232	3		0
PSY 200	3		0		0
	0		0		0
Total	**13**	**Total**	**12**	**Total**	

Plan Total	**25**

Classes Completed in Unplanned Terms Section

- Classes taken and their grades are shown for completed terms based on the **Show completed classes** checkbox

Classes Completed in Unplanned Terms

Term	Class	Grade
Summer 2007	ENG 101	C
	HUM 124	A
Fall 2007	ENG 102	A
Spring 2008	SOC 131	A
Summer 2008	CMS 210	A
	ENG 212	A
Fall 2008	HEA 285	A
Spring 2009	ENG 211	A

Planner "Planned vs. Taken" Mode

Planned vs. Taken – compare planned courses to those actually taken by the student

Student Educational Planner Section

- Student Name
- Current Term
- Description – field is used to distinguish one plan from another if the student has multiple plans
- Academic Year - field is also helpful if the student has multiple plans but also useful for reporting purposes
- Active/Inactive - Status of plan loaded
- Last Modified – Day, month, year & who modified plan loaded

Student Educational Planner	Print
Student	Student, Second
Current Term	Summer 2009 (only completed terms are evaluated)
Description	B.B.A. Acc Suggested Curriculum
Academic Year	2009-2010
Active/Inactive	**Active Plan**
Last Modified	Tuesday, August 25, 2009 by Kendrick, Susan B

Term, Planned Courses, Taken Courses Section

- Plan Term
- Planned Courses
- Actual Courses Taken

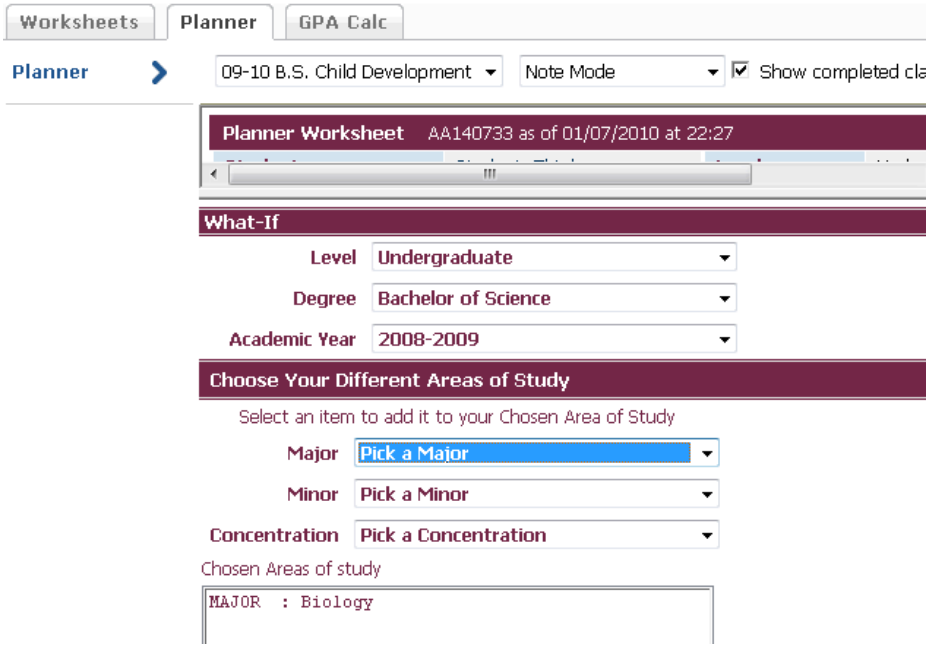
Fall 2009		Spring 2010	
Planned	**Taken**	**Planned**	**Taken**
ART 200	ART 200	AST 135	
BIO 100	BIO 100	ANT 200	
GSO 100	GSO 100	AFA 201	
MAT 107	MAT 107	CDF 232	
PSY 200	PSY 200		

Note: *Green balloon will appear if all courses for that term that was planned were taken. Red balloon will appear if a course that was not planned for the term was taken.*

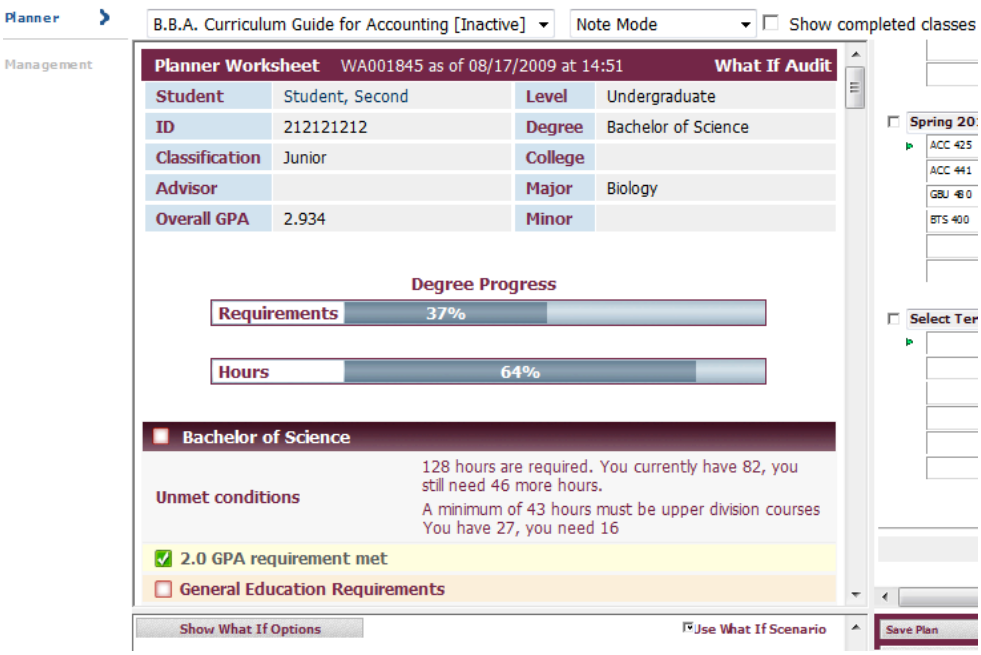
Planner "What If" Audits

The "What If" Planner Audit function during advising will allow you to run different scenario based on the major the student wishes to review. This function will also take into account any course that are in process or completed. To access this function click on **Show What If Options** button at the bottom of the left-hand corner. This will enlarge the What If frame.

Click the checkbox User What If Scenario in order for the What If audit to be processed. When the box is unchecked the student's normal degree is used.



Select the desired degree and major information. Click **Process New**, then, click **Hide What If Option**. The What If audit will process and can be reviewed. Use may resize the frame manually by dragging the separator bar.


Planner
Management
B.B.A. Curriculum Guide for Accounting [Inactive]
Note Mode
Show completed classes
Planner Worksheet WA001845 as of 08/17/2009 at 14:51
What If Audit
Student
Student, Second
Level
Undergraduate
ID
212121212
Degree
Bachelor of Science
Classification
Junior
College
Advisor
Major
Biology
Overall GPA
2.934
Minor
Degree Progress
Requirements
37%
Hours
64%
Bachelor of Science
Unmet conditions
128 hours are required. You currently have 82, you still need 46 more hours.
A minimum of 43 hours must be upper division courses You have 27, you need 16
2.0 GPA requirement met
General Education Requirements
Show What If Options
Use What If Scenario
Save Plan
Spring 20
ACC 425
ACC 441
GBU 480
BTS 400
Select Ter

GPA Calculators

There are three different GPA calculators:

- Graduation
- Term
- Advice

The calculators, in conjunction with current DegreeWorks 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

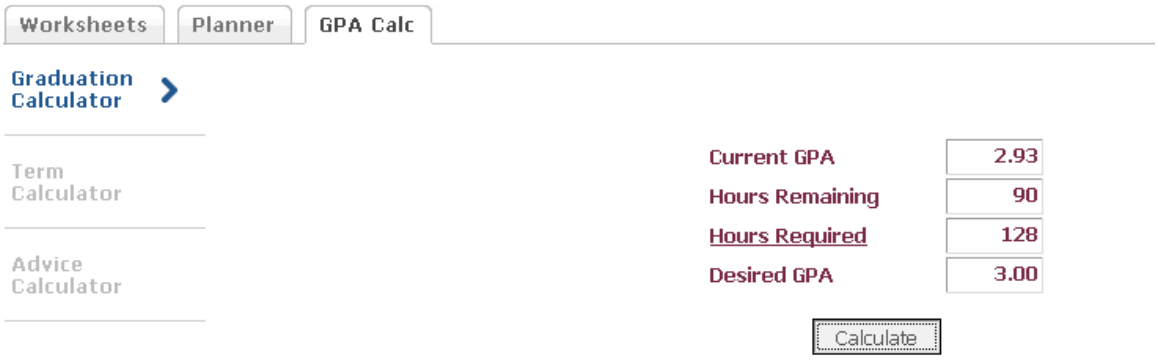
Graduation Calculator

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.

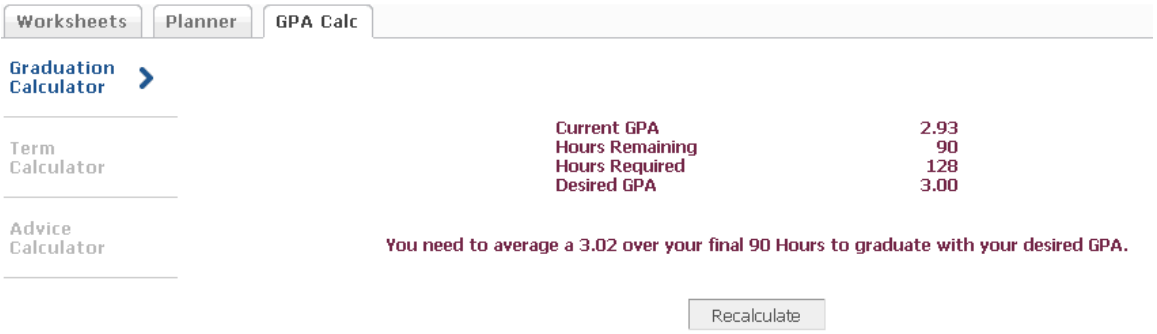
Graduation Calculator Input Fields

- Current GPA – Overall GPA defaults from the Audit
- Units Remaining – Enter number of credits *still needed* to graduate
- Units Required – Enter number of credits the degree requires
- Desired GPA – Enter the desired GPA

Enter data into the vacant fields as below and press **Calculate**.



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



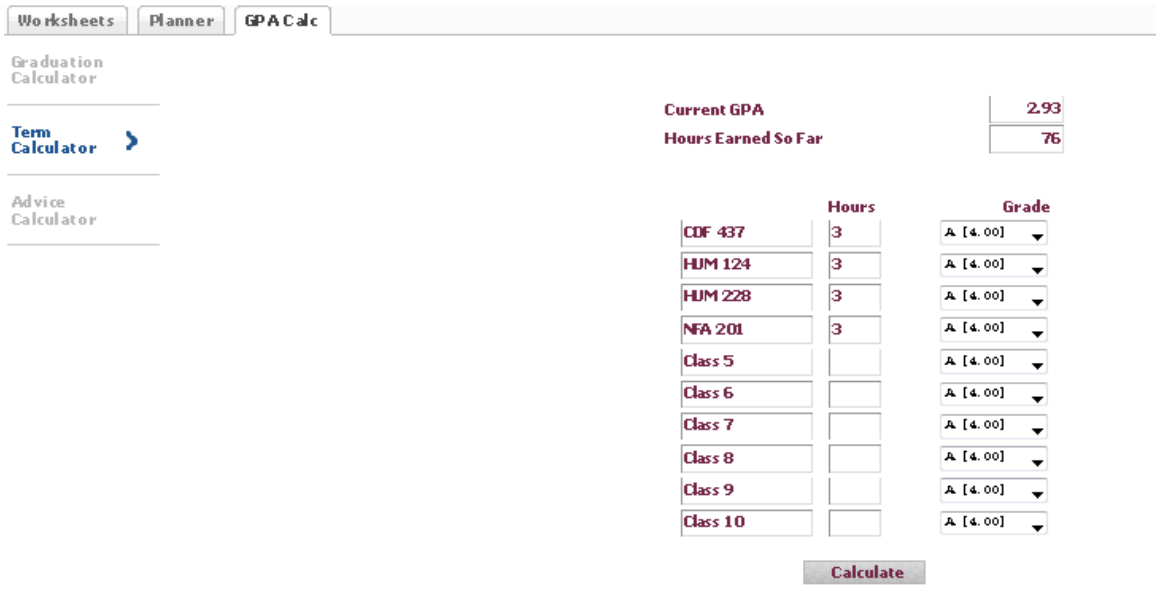
If you wish to alter some of the entries, click **Recalculate** and the calculate screen will appear for you to make other entries. When you click **Calculate**, the revised information will appear.

Term Calculator

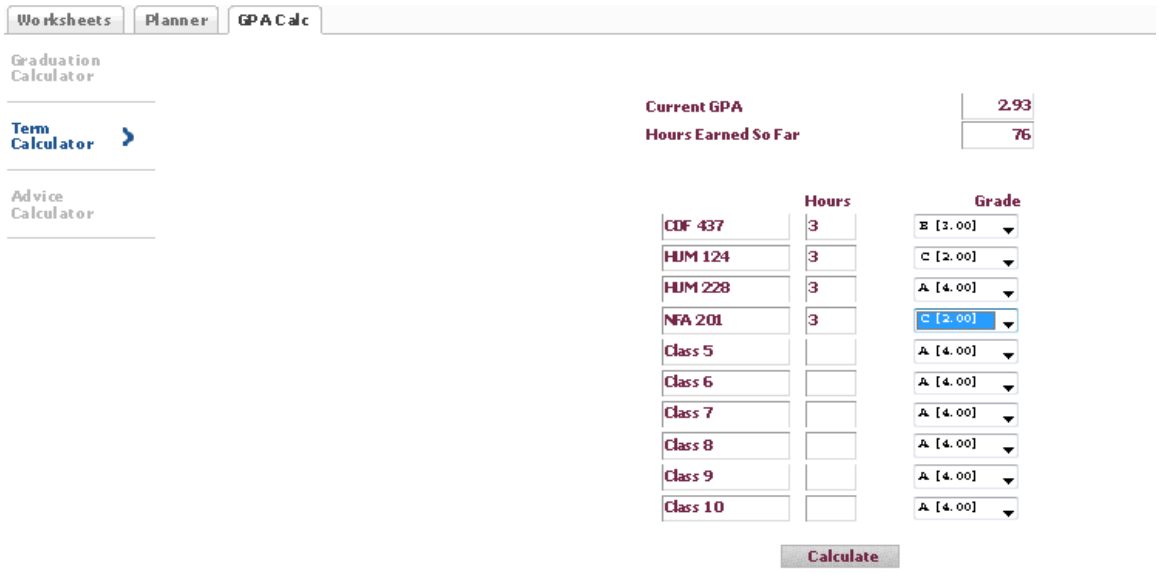
This calculator is very specific. It is used for goal-setting as well as mapping paths to avoid probation, achieve honors, etc.

Term Calculator Input Fields

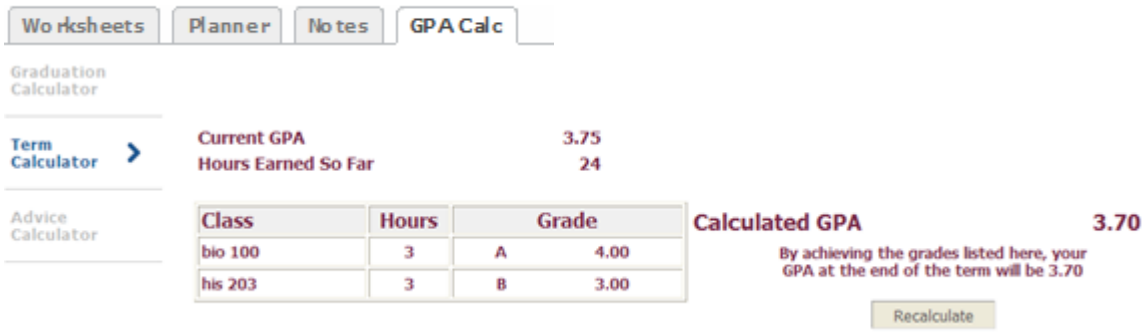
- Current GPA - Overall GPA defaults from the Audit
- Hours Earned So Far – Number of credits earned from complete classes with a grade
- Course Code – Code that identify the class that is in progress
- Course Hours – Number of hours the course is worth
- Grade – Expected grade in course taken



The In Progress classes and credit hours will be appearing in the fields. Select the grades that you assume you will make in the course and press **Calculate**.



The following show you the results of your calculation



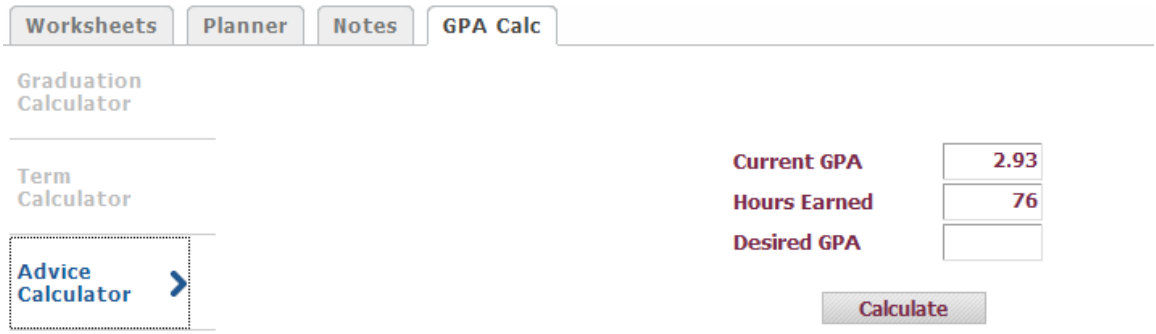
If you wish to alter some of the entries, click **Recalculate** and the Term Calculator screen will appear for you to make other entries. When you click **Calculate**, the revised information will appear.

Advice Calculator

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.

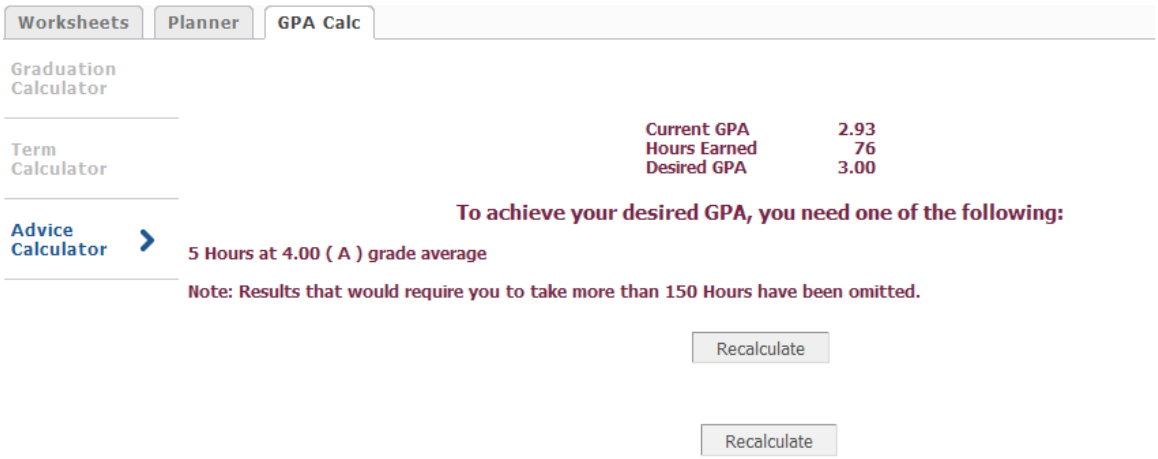
Advice Calculator Input Fields

- Current GPA - Overall GPA defaults from the Audit
- Hours Earned - Number of credits earned from complete classes with a grade
- Desired GPA – The desired GPA the student would like to achieve



Enter data into the vacant field as below and press **Calculate**.

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



If you wish 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.

NOTES