

Yes, this DW Training Manual is outdated! We will update it soon.

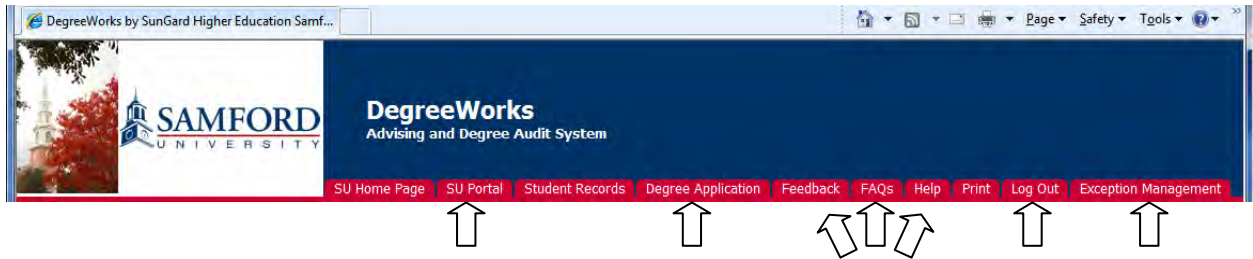
DegreeWorks Advisor Training Manual

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Standard Screen Items in DegreeWorks

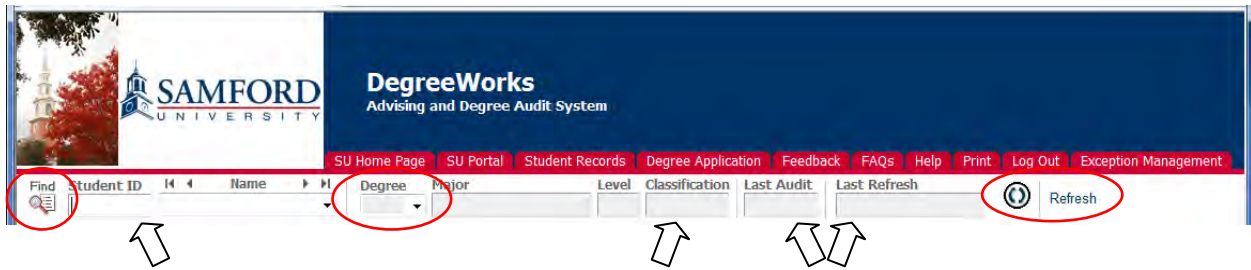
Navigation Tabs in the Header – Most of the tabs are self-explanatory, but here are few notes:



- The **SU Portal** tab was included when access to DegreeWorks was available only outside the Portal (during early testing). Clicking on it while inside the Portal will cause problems, ultimately forcing you to log out and re-login. It'll be removed soon, but until then, **DON'T click on it!**
- The **Degree Application** tab links to the PDF of the Application for Undergraduate Degree.
- The **Feedback**, **FAQs**, and **Help** tabs are works in progress. They are active links, but we're still in the process of building those documents.
- Clicking the **Log Out** tab will exit you from DegreeWorks only—not the Samford Portal.
- The **Exception Management** tab is only visible to users with full DegreeWorks access (Student Records staff and selected technical personnel). Advisors, Course Guardians, and Students do NOT have this tab.

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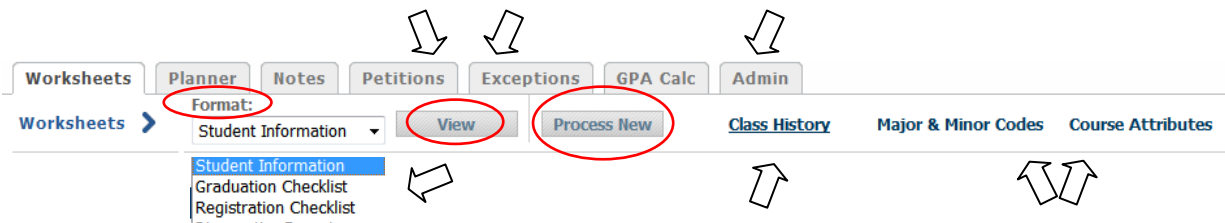
Key Block – Most of these fields are self-explanatory, but here are few notes:



- The **Find** icon (magnifying glass) allows you to search on a student. More on that later.
- You can enter a **Student ID** directly into the field noted above and hit Enter to bring up a single student's audit. Only Advisors, Course Guardians, and DegreeWorks users will full access can search on students in the database or enter a student ID directly. **Students do NOT have the ability to search on another student. They will only be able to view their own degree audit.**
- The **Degree** field should default to the student's primary program, but often displays the secondary one instead (i.e., Pre-Law). (Chalk this up to a DegreeWorks quirk.) If you don't see the degree program that you think you should, click the arrow under **Degree** to see what other programs the student might have declared. Choose the desired one and hit Enter.
- **Classification** might be blank if the last audit/refresh date is old. Often these are former students and graduates who are still in the DegreeWorks database. Clicking **Refresh** and **Process New** should populate that field, but more than likely these individuals are not currently enrolled students.
- Date of **Last Audit** shows the most recent date an audit was run. Audits can be generated on an individual basis manually (by clicking **Process New**, see graphic on next page) or in batches at the server level. Audits will not be re-run automatically on a daily or weekly basis—it takes way too much processing time and power to do this for all active students. Instead, they will be run in random batches overnight and sometimes in specific batches (all POLS majors, for instance), or when program coding has been revised or updated for a particular major or degree. Only the last three audits are retained in History (more on that later).
- Date of **Last Refresh** shows the most recent date the student's data was refreshed from the Banner system. Student and advisor data extracts are typically run overnight so the data is refreshed daily. However, if the date is old, or if you know, for example, that the student has just registered, added/dropped a class, or changed a major THAT DAY, you will need to 1) Click the **Refresh** button to let it update the Banner data and 2) Click **Process New** to generate an updated audit with the now-refreshed data. **Students will NOT have access to either of these buttons.** That said, a **"What If"** audit WILL do both at the same time—refresh the data and process it anew—but only for the What If scenario, not for the student's primary degree audit.

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Degree Audit Tabs and Additional Links – Most of these will be discussed later, but here are few notes:



- The grey tabs will be discussed in more detail later, but the **Petitions**, **Exceptions**, and **Admin** tabs are not available to Advisors, Course Guardians, or Students. Only users with full DegreeWorks access will have these tabs.
- The **Format** field allows users to look at a couple of different formats. The default **Student View** is the most complete, but other versions available to students and advisors is the **Registration Checklist** and **Graduation Checklist**. Each looks at the same data, but filters out either requirements not yet completed (Graduation Checklist) or requirements already completed (Registration Checklist). When choosing a different view, click the drop down box, choose the desired format, and click **View**. Users with full DegreeWorks access—like Student Records—can see additional formats, such as Diagnostic Reports, that can help troubleshoot coding glitches.
- **Process New** not only allows for running a new audit once Banner data has been refreshed (as noted earlier), it allows for updating an audit once DegreeWorks coding has been revised. For this reason, it is used heavily while testing program coding. **For most advisors, it should only be used if a known change has been made to the student's record, but that change is not reflected in the most recent audit.** It too—in addition to the Refresh button—can drain system resources, so use it only if needed. It's understood that it will be used quite a lot during the registration period, however.
- **Class History** will be discussed in more detail later. It generates a very basic review of the student's academic work—much like a transcript—in chronological order, but without semester totals and GPAs.
- **Major & Minor Codes** and **Course Attributes** are PDF files created by Student Records to assist users as they navigate their way around an audit. They explain the basic program codes (abbreviation and full name) and course attributes (codes that are used to help identify and tag courses, but which may be cryptic to the average user).

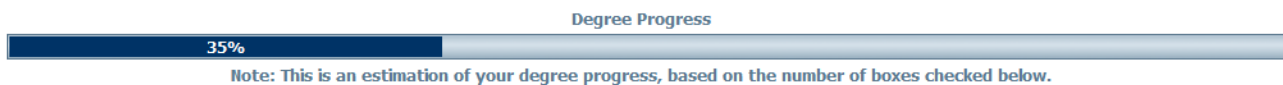
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Student Information Block – This block displays a customized view of various student data, including Samford/Overall Hours and GPA, Advisors, Catalog Year, Expected Grad Term, Academic Status, etc. We are very fortunate to be able to display this data, but it comes at great effort on the part of our technical/web staff. It’s always possible that we may lose links to some detail in future DegreeWorks upgrades, but we hope to retain as much of this data as possible as we go forward. The word PROD should eventually be dropped from this Web view, but at this time it helps designate this version of DegreeWorks (as compared to the TEST version that only Student Records and the technical staff can access). (FYI: Names and IDs have been blocked out in this manual for privacy reasons.)

Samford University PROD

Student Information AA162968 as of 02/17/2010 at 01:41					
Name	M[REDACTED]	School	Howard College: Arts/Sciences	Samford GPA	3.765
ID	900[REDACTED]	Degree	Bachelor of Science	Samford Hours	17
Advisor 1	Toone, Brian R	Major 1	Computer Science	Transfer Hours	19
Advisor 2	Kennington, Cynthia S	Concentration 1		Overall GPA	3.764
Level	Undergraduate	Minor 1		Overall Hours	36
Classification	Sophomore	Major 2		Major 1 GPA	4
Catalog Year	2010	Concentration 2		Minor 1 GPA	
Expected Grad Term	201320	Minor 2		Academic Status	Good Standing
Graduation Date		Degree Awarded			

Progress Bar – The **Degree Progress Bar** is helpful, but can be deceptive. It is based on the number of checked boxes within the audit, but includes work in progress as satisfying specific degree requirements. So while technically a student may have passed 28% of his/her required course work, with registration for the next term factored in, he/she may be estimated at 35% degree progress. Please use this graph as a guide when advising a student, but do not consider it the final word. Be sure to review the **entire** degree audit for specific advice on requirements met and unmet within in each block.



Legend – While shown only on some DegreeWorks screens, the **Legend** is very important in interpreting data on all screens. Since space is limited within the audit, the Legend block is small and contains only the essentials, but the **FAQ** page will eventually include a more complete Legend explaining additional symbols and codes used within an audit. A link to the FAQ page is available at the top of the DegreeWorks screen and within the Legend itself.

Legend		
<input checked="" type="checkbox"/> Complete	* Prerequisites exist for this course	@ Any course number
<input type="checkbox"/> Not Complete	NR: In-progress course, grade not yet recorded	@@ Any course prefix and any course number
<input checked="" type="checkbox"/> Complete except for classes in-progress	(T) Transfer Class	For an explanation of codes for course attributes, majors, etc., see FAQs
<input checked="" type="checkbox"/> Nearly complete - see advisor		

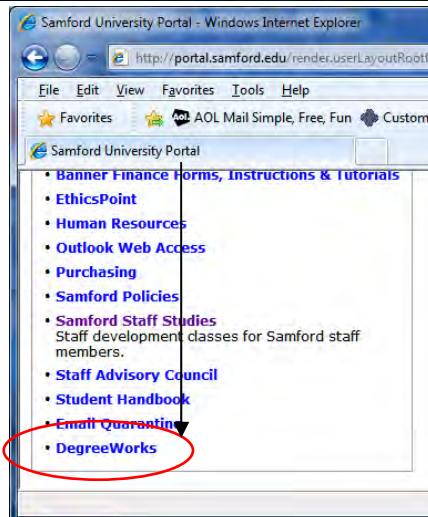
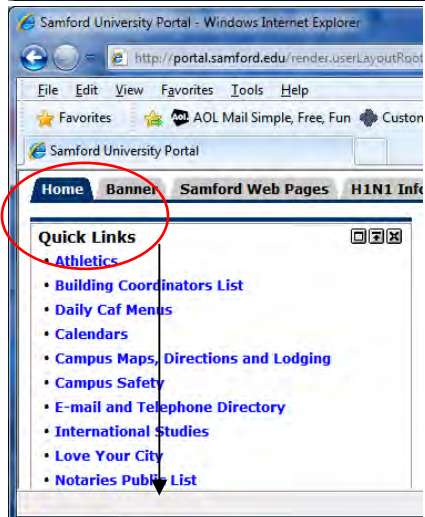
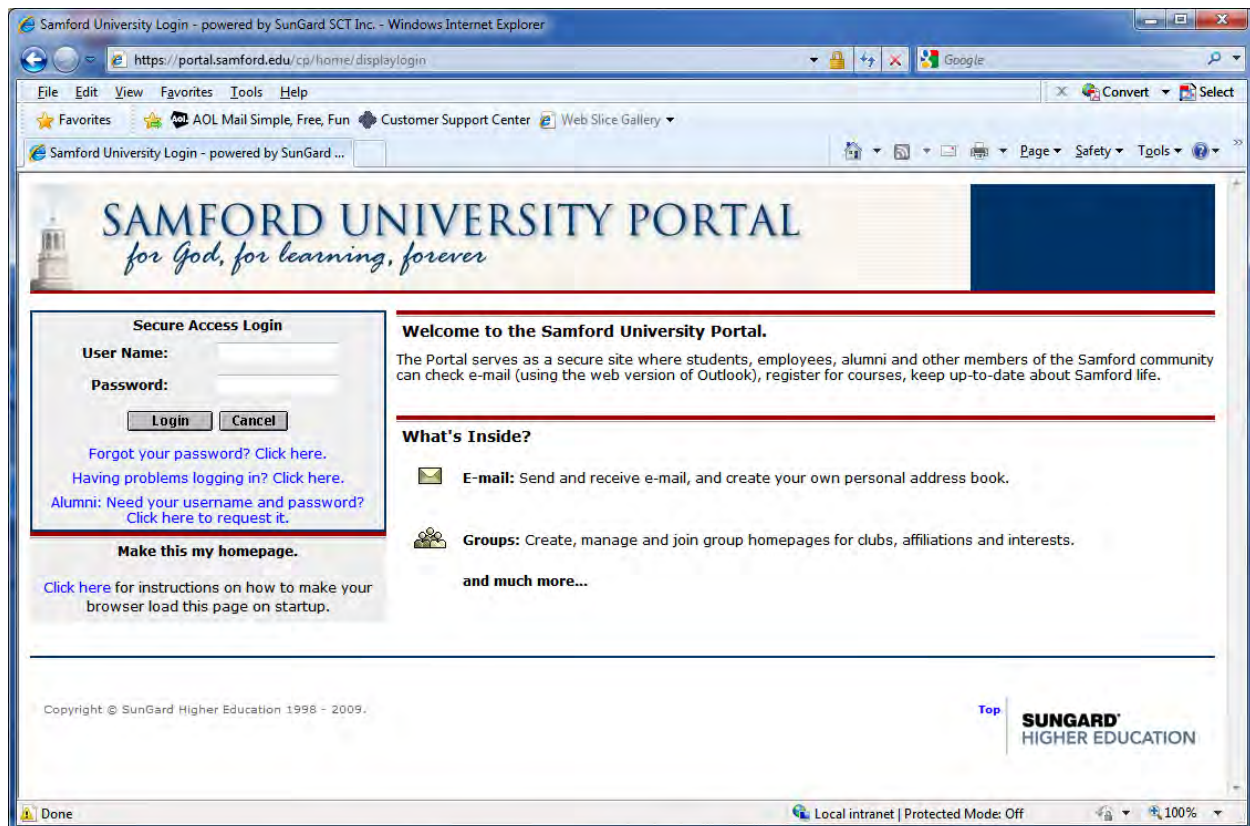
Disclaimer – The **Disclaimer** is shown at the bottom of most screens. While mainly intended for students, advisors should become familiar with the wording, especially the third sentence that stresses **that the degree audit is not the same as a transcript nor should it be considered official notification of degree completion.**

Disclaimer
 You are encouraged to use this degree audit report as a guide when planning your progress toward degree completion of the above requirements. Your academic advisor or the Student Records 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 Student Records Office regarding this degree audit report, your official degree/certificate completion status, or to obtain a copy of your academic transcript. Application for an undergraduate degree should be made in the semester prior to the term in which you expect to graduate. See the application for exact deadlines. [Click here](#) for more information.

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Logging In

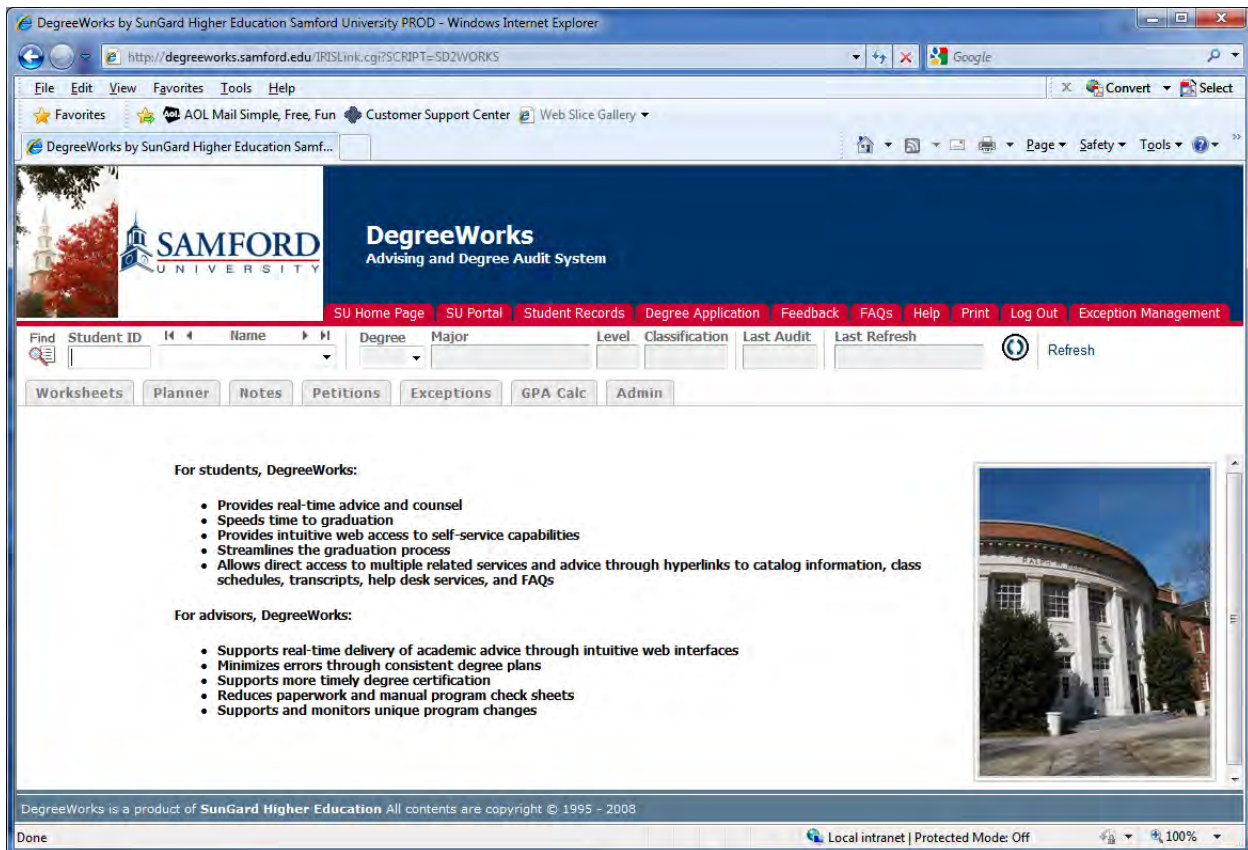
- Go to the Samford Portal: <https://portal.samford.edu/cp/home/displaylogin>
- Type in your **Username** and **Password**. Logging in through the Portal authenticates you, allowing you to access DegreeWorks.
- Under the **Home** tab, under **Quick Links**, you should see the **DegreeWorks** link (it may be at the bottom of the list). (FYI: If you've customized your pages within Banner Self-Service, your screens may not look exactly like the sample shots below. If you've removed the Quick Links block, you'll want to add it back.)



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The **DegreeWorks Welcome** screen will appear.

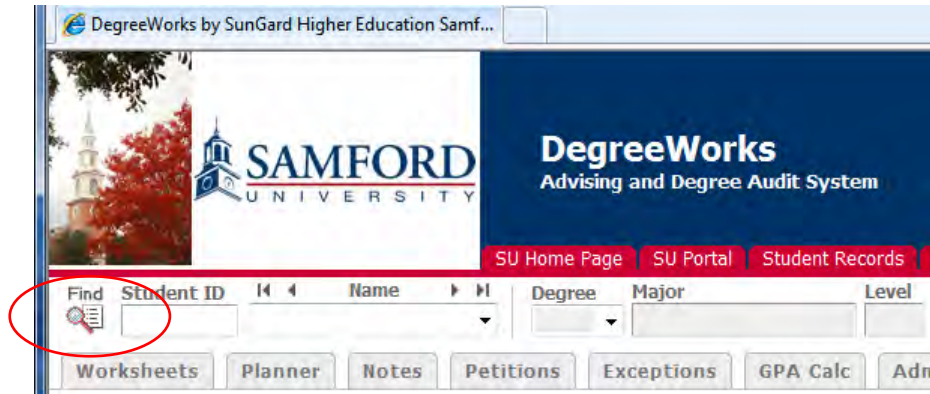
FYI: DegreeWorks will open in a new window, so Portal access is still intact and separate. You can log out of DegreeWorks and it won't impact your Portal session. **However, you cannot log out of the Portal and keep DegreeWorks open.** If you try to search on a student or run a What If after logging out of the Portal, you'll get an error message that your passport is invalid (this may also happen if there's a long period of inactivity). Just log back in to the Portal to re-open DegreeWorks.



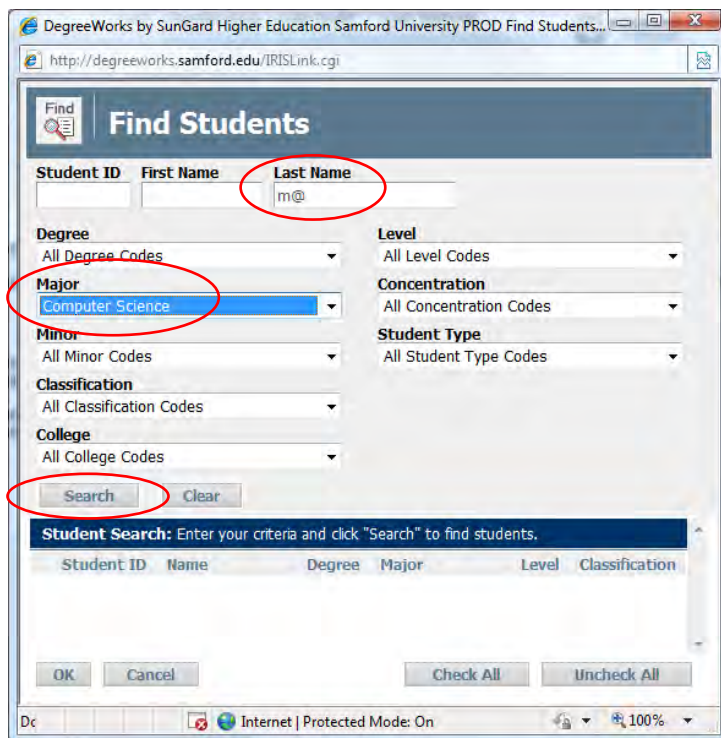
Searching for Students

Most advisors will have their list of advisees pre-loaded upon login to DegreeWorks, but they can also look at the record of any active student either by entering the student's Banner ID (9-number) or searching on student name, degree, major, etc.

- Click the **Find** button (magnifying glass icon).

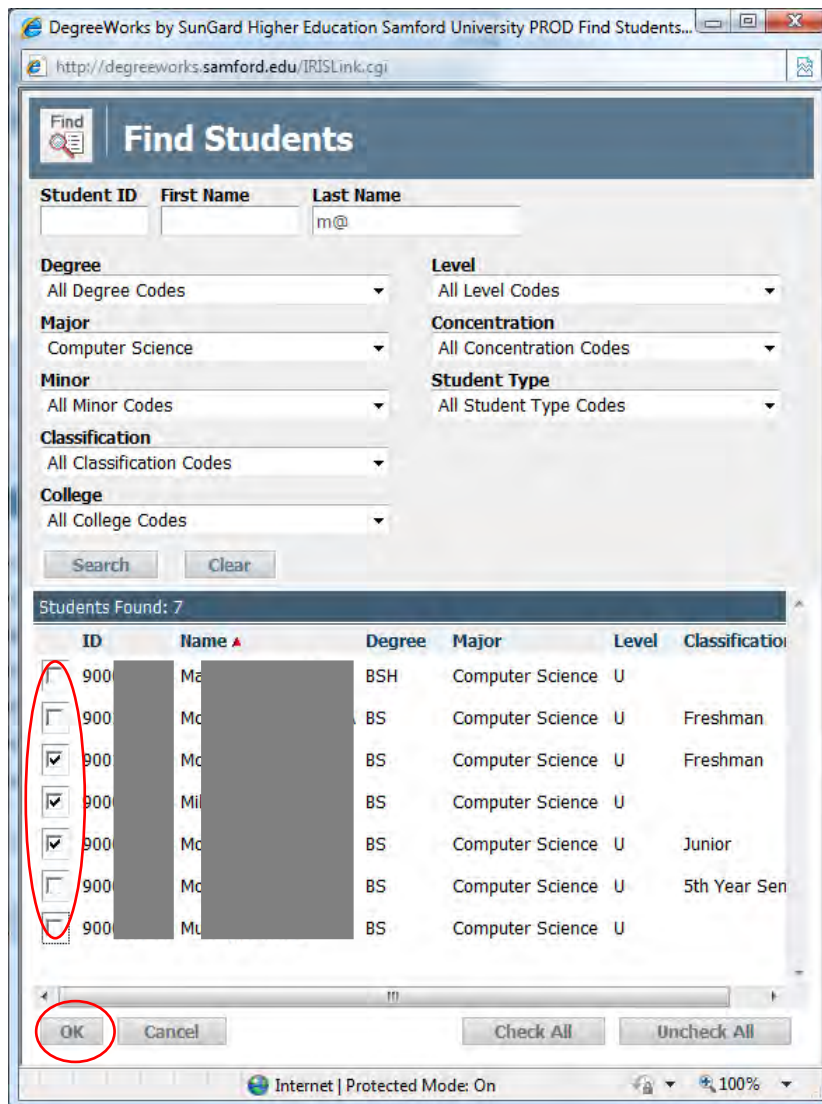


- Type in any and all options in the upper section of the dialog box.
(In the example below there is an "m@" typed in the **Last Name** textbox and "Computer Science" is selected in the **Major** drop down list. *The "@" sign is used as a wildcard in searches.*)
- Click the **Search** button



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- This will return all *Computer Science* students whose last name begins with an "M"
- Select either one, some, or all of the returned names by checking and un-checking the boxes next to the appropriate names. (FYI: Names and IDs have been blocked out in this manual for privacy reasons.)
- Once all desired names are selected click the **OK** button



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- This takes you to the main DegreeWorks screen (Worksheets>Student Information format).
- All students selected in the previous screen will be populated in the drop down list under **Name**.
- Whichever student is selected from this list (highlighted in blue) will be the student's data that is displayed in all the other screens. The default screen is called the Student Information format.
- No matter which screen you are in you may select a different student from this list to begin working with that student's data.
- Check the **Last Refresh** date as this shows the date and time that DegreeWorks last refreshed its data with the Banner system. Student and advisor data is typically refreshed every night.
- But if out of date, or if you know, for example, that the student has just registered, added/dropped a class, or changed a major THAT DAY, you will need to click the **Refresh** button to let it update the Banner data and then click **Process New** to generate an updated audit with the now-refreshed data.

The screenshot displays the DegreeWorks Advisor Training Manual interface for Samford University. The interface is a web browser window showing the DegreeWorks Advising and Degree Audit System. The top navigation bar includes links for SU Home Page, SU Portal, Student Records, Degree Application, Feedback, FAQs, Help, Print, Log Out, and Exception Management. The main content area is titled "Samford University PROD" and shows student information for "AA983041 as of 07/10/2009 at 00:37". The student's name is "McL", ID is "900", and they are a "Freshman" in "Computer Science". The "Degree Progress" bar shows 21% completion. A legend explains various symbols used in the audit, such as "Complete", "Not Complete", and "Transfer Class". The bottom of the screen shows the academic year "2009-2010" and "Credits Required: 128".

Note: If a student has been newly admitted, he/she might not be in the system yet. Please contact Student Records if you need to review an audit for a newly admitted freshman or transfer student and you receive an error message that the student's ID cannot be found in DegreeWorks.

Class History Pop-Up Window

Similar to a transcript, the **Class History** button displays a pop-up of the student's academic history, including transfer and AP/CLEP credit, completed Samford work, and enrollment for the current or upcoming term. Please note that if transfer or AP/CLEP work was applied to the same term in which the student also completed Samford courses, they will be grouped together under that term's overview (as seen in the example below). This is different from how an official transcript looks or even from how an *unofficial* transcript looks via Banner Self-Service. The **Class History** display does not show hours attempted/earned or GPAs for an individual term.

The screenshot shows a web browser window titled "Class History - Windows Internet Explorer" displaying the "Samford University PROD" interface. The main heading is "Class History AA162968 as of 02/17/2010 at 01:41". Below this is a summary table for the student's information:

Student	Mc [REDACTED]	Level	Undergraduate
ID	90 [REDACTED]	College	Howard College: Arts/Sciences
Advisor 1	Toone, Brian R	Degree	Bachelor of Science
Advisor 2	Kennington, Cynthia S	Major	Computer Science
Samford GPA	3.765	Classification	Sophomore

Below the summary table, the course history is organized by term:

Fall 2009

COSC 110	Intro to Programming	A	4
ECON 201	Principles of Macroeconomics	P	4
<i>Transferred from</i> ECON201 - Advanced Placement Program			
ECON 202	Principles of Microeconomics	P	3
<i>Transferred from</i> ECON202 - Advanced Placement Program			
FOUN 101	Foundations	A	1
GEOG 150	Physical Geography	A-	4
HIST 218	Modern America Since 1865	P	4
<i>Transferred from</i> HIST218 - Advanced Placement Program			
MATH 240	Calculus I	P	4
<i>Transferred from</i> MATH240 - Advanced Placement Program			
POLS 205	Intro To American Politics	P	4
<i>Transferred from</i> POLS205 - Advanced Placement Program			
UCCA 102	Communication Arts II	B+	4
UCCP 101	Cultural Perspectives I	A	4

Spring 2010

COSC 107	Intro to Computer Science	NR	4
PHED 118	Beginning Social Dance-Men	NR	1
UCBP 101	Biblical Perspectives	NR	4
UCCP 102	Cultural Perspectives II	NR	4
UCFH 120	Concepts Fitness and Health	NR	2

Tabs Overview

There are tabs and options under each tab, although, as noted earlier, not all are available to all DegreeWorks users. "Tabs" included are **Worksheets**, **Planner**, **Notes**, **Petitions**, and **GPA Calc**.

Worksheets tab

Student Information AA079162 as of 06/18/2009 at 00:36			
Name	Mc [redacted]		Sci
ID	90		De
Advisor 1	Kavel, Gregory A		Ma
Advisor 2	Donaldson, Steven F		Co
Level	Undergraduate		28

Petitions tab (Not available at this time)

View Petitions

- View Petitions for Exceptions
- No Petitions Waiting Approval
- No Petitions Approved
- No Petitions Applied as Exceptions
- No Petitions Rejected

Planner tab

Planner Worksheet AA079162 as of 06/18/2009 at 00:36				
Student	Mc [redacted]	Level	Undergrad	
ID	90	College	Howard Col	
Advisor 1	Kavel, Gregory A	Degree	Bachelor of	

GPA Calc tab

Graduation Calculator

- Term Calculator
- Advice Calculator

Notes tab (Not available to Students)

Notes	
Note Text	Student was advised to apply for graduation by the official deadline which is December

Worksheets Tab

This tab is used for reviewing what the student has already completed and how his/her course work is being applied towards graduation. There are several ways to view this data.

Overall Audit – Student Information Format

(This is the default screen when you select a new student from the **Name** drop down list)

- Click on the **Worksheets** option
- Under the format drop down list select **Student Information**
- Click the **View** button

Samford University PROD

Student Information AA079162 as of 06/18/2009 at 00:36

Name	M	School	Howard College: Arts/Sciences	Samford GPA	2.904
ID	96	Degree	Bachelor of Science	Samford Hours	67
Advisor 1	Kawel, Gregory A	Major 1	Computer Science	Transfer Hours	
Advisor 2	Donaldson, Steven F	Concentration 1		Overall GPA	2.904
Level	Undergraduate	Minor 1		Overall Hours	67
Classification	Junior	Major 2		Major 1 GPA	2.86
Catalog Year	2008	Concentration 2		Minor 1 GPA	
Expected Grad Term	201120	Minor 2		Academic Status	Good Standing
Graduation Date		Degree Awarded			

Degree Progress

72%

Note: This is an estimation of your degree progress, based on the number of boxes checked below.

Legend

- Complete
- Not Complete
- Complete except for classes in-progress
- Nearly complete - see advisor
- * Prerequisites exist for this course
- NR: In-progress course, grade not yet recorded
- (T) Transfer Class
- Any course number
- Any course prefix and any course number

Bachelor of Science Academic Year: 2007-2008 Credits Required: 128

Unmet conditions for this set of requirements: A minimum of 40 upper-level credits required. You have completed or are currently enrolled in a total of 16, but still need 24 more upper-level credits. A minimum of 128 credits required for this degree and major. You currently have 84. You need at least 44 more credits.

Using the Legend as a guide, you can scroll through the student's information to see what the student has completed and what he/she still needs to complete in order to graduate. This view will even give you information on what courses will meet the unfulfilled requirements.

Major in Computer Science (BS) Academic Year: 2007-2008 Credits Required: 48
GPA: 2.660 Credits Applied: 28

Unmet conditions for this set of requirements: 48 credits are required. You currently have 28, you still need 20 more credits.

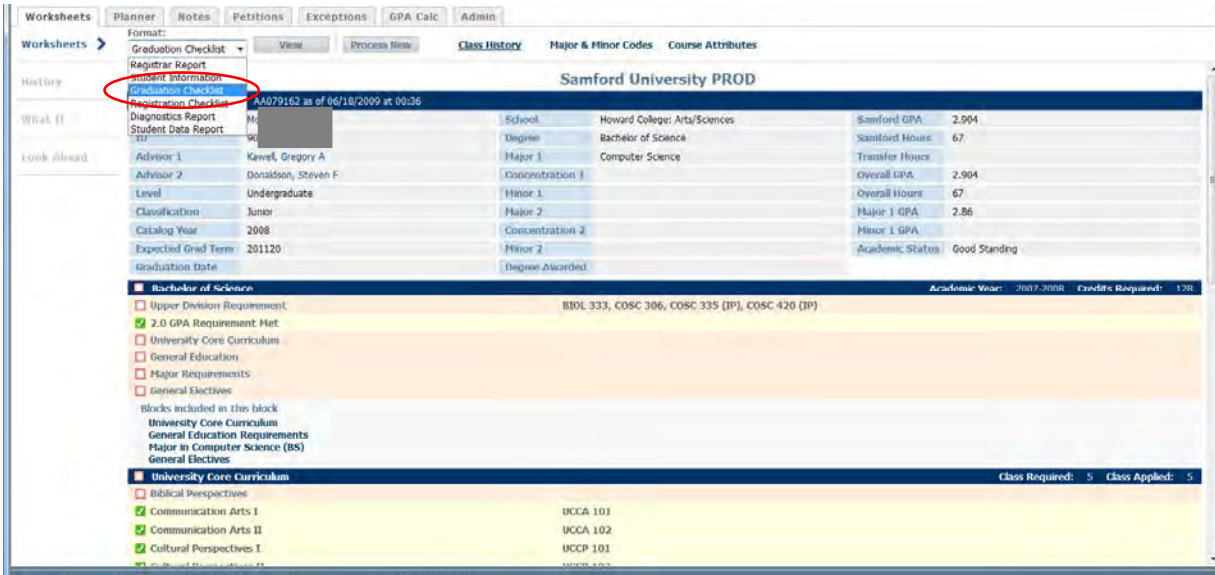
General Electives for Computer Science Degree must include 16 hours in an approved Application Area. Please see your advisor to determine the plan of study.

<input checked="" type="checkbox"/> Introduction to Programming	COSC 110	Intro to Programming	B+	4	Fall 2007
<input checked="" type="checkbox"/> Discrete Structures for Computer Science	COSC 200	Discrete Structures for COSC	B	4	Fall 2008
<input checked="" type="checkbox"/> Data Structures & Algorithms	COSC 210	Data Structures/Algorithms	C	4	Spring 2008
<input type="checkbox"/> Computer Organization & Architecture		Still Needed: 1 Class in COSC 305*			
<input checked="" type="checkbox"/> One of the following	COSC 306	Principles of Bioinformatics	B	4	Spring 2009
<input type="checkbox"/> Languages & Theory		Still Needed: 1 Class in COSC 325*			
<input checked="" type="checkbox"/> Operating Systems & Networking	COSC 335	Operating Systems/Networking	NR	(4)	Fall 2009
<input checked="" type="checkbox"/> Software Engineering	COSC 420	Software Engineering	NR	(4)	Fall 2009
<input type="checkbox"/> Current Topics in Computing		Still Needed: 1 Class in COSC 460*			
<input type="checkbox"/> Artificial Intelligence & Adv Computing Strategies		Still Needed: 1 Class in COSC 470			
<input type="checkbox"/> Senior Seminar & Project		Still Needed: 1 Class in COSC 495*			

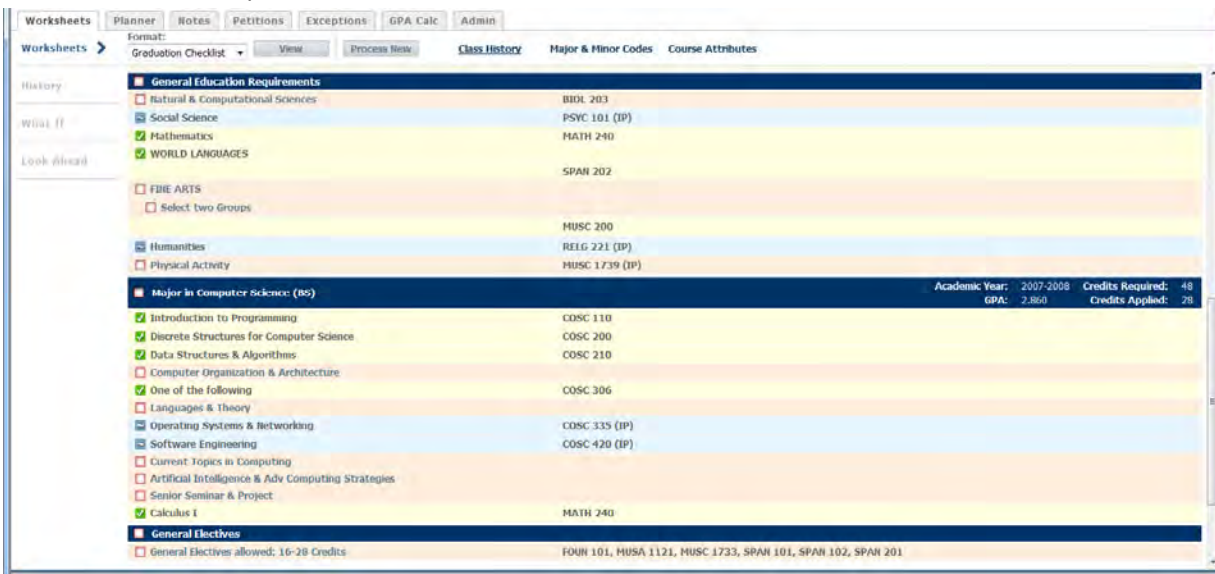
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To see the data in a more compact fashion, and *without* all the information on which courses meet specific requirements, do the following:

- Click on the **Format** drop down list
- Select **Graduation Checklist** from the list and click **View**



This is the more compact view of the **Graduation Checklist**.



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To see the data differently, looking at only the requirements that are still unmet, do the following:

- Click on the **Format** drop down list
- Select **Registration Checklist** from the list and click **View**

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

Worksheets > **Format:** Registration Checklist | **View** | **Process New** | **Class History** | **Major & Minor Codes** | **Course Attributes**

Samford University PROD

Requirement	Catalog Year	Credits Required
Bachelor of Science	2007-2008	128
Still Needed: 40 upper-level credits required. See the Unmet Conditions line above for more information.		
Still Needed: See University Core Curriculum section		
Still Needed: See General Education Requirements section		
Still Needed: See Major in Computer Science (BS) section		
University Core Curriculum		
Still Needed: 1 Class in UCBP 101		
General Education Requirements	2007-2008	
Still Needed: Choose from 1 of the following: (1 Class in LOND 202) or (Choose from 1 of the following:) (1 Class in ART 200 or 301 or 381 or 382 or 383 or LOND 201) or (1 Class in THEA 200 or 331 or LOND 200)		
Still Needed: 1 Credit in PHED 102:141 or 147:153 or DANC 100:102 or 201 or 202* or 211 or 212 or 301 or 302* or MUSC 3739 or @ @ ATTRIBUTE = GPHE		
Major in Computer Science (BS)	2007-2008	48
Still Needed: 1 Class in COSC 305*		
Still Needed: 1 Class in COSC 460*		
Still Needed: 1 Class in COSC 470		
General Electives		

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Local intranet | Protected Mode: Off | 100%

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What If Scenarios

To see what the student would have to complete if he/she changed majors or added a major/minor, do the following:

- Click on the **What If** option under the **Worksheets** tab.
- Make any and all selections you want from the drop down boxes for Major, Minor, and Concentration.

Important Notes about What If Options:

- **Some majors won't be available unless you choose the appropriate degree** (for example, you cannot choose a Bachelor of Science with a major in English). Minors, however, can be attached to any major.
 - **Unfortunately, any concentration can be added to any degree/major. This is a DegreeWorks quirk/glitch and does not match Samford policy or Banner restrictions.** Just keep in mind that although DegreeWorks allows for this mix and match right now, a student won't necessarily be able to officially declare these combinations (English Major w/an International Business Concentration?) in the real world. Labels have been added to concentrations to indicate their major-specific connection and, whenever possible, DegreeWorks coding behind the scenes imposes the restrictions.
 - Our programs have been coded for the 2008-09 catalog year and we are currently in the process of updating programs per 2009-10 catalog revisions. In only selected cases will we be coding for earlier catalog years. The display of multiple catalog years in the What If block doesn't mean that there is a unique version of the program for each year displayed (most of these are reserved for future use).
 - **What If scenarios do not allow for dual-degree options** (Bachelor of Science in Chemistry + Bachelor of Arts in History). Each desired program would need to be run under an individual What If.
- If you want to see what would happen if a student took a certain class, type in the appropriate **Subject** and course **Number** in the text boxes and Click the **Add Course** button.
 - Click the **Process What If** button to see the results.

The screenshot displays the DegreeWorks Advisor interface. At the top, there are navigation tabs: Worksheets, Planner, Notes, Petitions, Exceptions, GPA Calc, and Admin. Below these, a 'Format:' dropdown is set to 'Student Information', and a 'Process What-If' button is circled in red. The 'What-If' section is active, showing 'Level: Undergraduate', 'Degree: Bachelor of Science', and 'Academic Year: 2007-2008'. A 'What If' button with a right-pointing arrow is also circled in red. Below this is the 'Choose Your Different Areas of Study' section, which includes three dropdown menus: 'Major: Pick a Major', 'Minor: Pick a Minor', and 'Concentration: Pick a Concentration'. The 'Major' dropdown is circled in red. To the right, a 'Chosen Areas of Study' box displays 'MAJOR : Computer Science' and 'MINOR : Art'. Below this is the 'Choose Your Future Classes' section, which has 'Subject' and 'Number' text boxes, a 'Find' button, and an 'Add Course' button, all circled in red. To the right, a 'Courses you are considering' box displays 'COSC 460'.

The **Find** button on this page links to the Student Records University Catalog page. From there, students and advisors can access PDFs of the current and most recent Samford catalogs to look up a course and/or its description.

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Here are the results of the previous changes:

- Note the course "COSC 460" shows up as a course in a "Planned Term."
- Note the "**Minor in Art**" section has now been added to the student's requirements.
- These are not permanent changes to the student's record; they merely give students and advisors the ability to temporarily see what would happen if the student chose a slightly different program.

The screenshot displays the DegreeWorks Advisor interface with several sections highlighted by red boxes. The top navigation bar includes tabs for Worksheets, Planner, Notes, Petitions, Exceptions, GPA Calc, and Admin. The main content area is divided into History, What If, and Look Ahead sections. The Look Ahead section is currently active, showing a list of courses with their respective grades, credit hours, and planned terms. A red oval highlights the course "COSC 460" (Current Topics in Computing) with a grade of "PL" and 4 credits, marked as "Planned Term". Below this, the "General Electives" section is visible, listing various courses like FOHR 101, MUSC 1723, SPAN 101, SPAN 102, and SPAN 201. A red box highlights the "Minor in Art" section, which indicates that 22 credits are required and currently 0 have been applied. The "Minor in Art" section lists requirements such as Structure I, Structure II, Drawing, Painting, and Art History, each with a "Still Needed" status and a requirement for one class in a specific ART course.

Course	Grade	Credits	Term
COSC 306	B	4	Spring 2009
COSC 335	NR	(4)	Fall 2009
COSC 420	NR	(4)	Fall 2009
COSC 460	PL	(4)	Planned Term
HATH 240	B	4	Spring 2009

Minor in Art
Academic Year: 2007-2008 Credits Required: 22
GPA: 0.000 Credits Applied: 0

22 credits are required. You currently have 0, you still need 22 more credits.
Your GPA is 0; a GPA of 2.0 is required.
A minimum of 9 credits must be taken in residence.
Minimum Credits unsatisfied

Requirement	Still Needed
Structure I	1 Class in ART 101
Structure II	1 Class in ART 102
Drawing	1 Class in ART 221 or 322 or 323*
Painting	1 Class in ART 231 or 232 or 323* or 334*
Art History	1 Class in ART 301 or 302 or 303

DegreeWorks Advisor Training Manual - Samford University

Printing an Audit

Don't use your browser's print option to print an audit or What If scenario (you run the risk of getting a blank page or a printout with the header and frames and important data cut off). Instead use the DegreeWorks print button:

- Select the format view that you want to print (Student Information is currently selected).
- Click the **Print** button. The result will be in small print, but it will provide complete data and does not waste ink on unnecessary graphics.

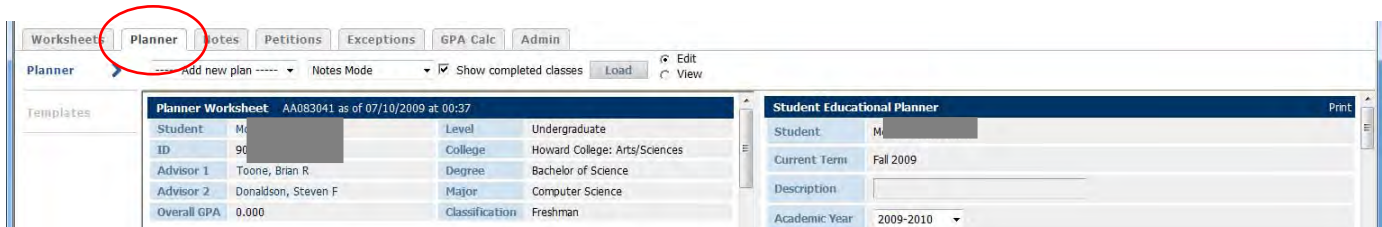
The screenshot displays the DegreeWorks Advisor interface for Samford University. The top navigation bar includes links for Home Page, Portal, Student Records, Degree Application, Feedback, FAQ, Help, Print, Log Out, and Exception Management. The main content area shows a student's audit for a Bachelor of Science degree in Computer Science. The audit is titled "Student Information" and includes a table of requirements. A "Print" button is circled in red, and a callout box labeled "Print Button" points to it. The audit shows a 72% degree progress bar and a legend for various requirement statuses.

Requirement	Status	Notes
Name	Complete	
ID	Complete	
Advisor 1	Complete	
Advisor 2	Complete	
Level	Complete	
Classification	Complete	
Catalog Year	Complete	
Expected Grad Term	Complete	
Graduation Date	Complete	
School	Complete	Howard College: Arts/Sciences
Degree	Complete	Bachelor of Science
Major 1	Complete	Computer Science
Concentration 1	Complete	
Minor 1	Complete	
Major 2	Complete	
Concentration 2	Complete	
Minor 2	Complete	
Degree Awarded	Complete	
Samford GPA	2.904	
Samford Hours	67	
Transfer Hours		
Overall GPA	2.904	
Overall Hours	67	
Major 1 GPA	2.86	
Minor 1 GPA		
Academic Status	Good Standing	

Planner Tab

Use this tab to lay out a plan for the student to take over the next one or more terms. The student can see this information as well and can work with it and modify it if given permission. You can make more than one plan for a student, but only one can be the "Active Plan" against which DegreeWorks will be displaying/applying data.

- Click on the **Planner** tab



Disregard this section. We use the newer Planner feature which did not exist when this training manual was first created.

Some of the same features DO exist in the new Planner, however.

A revised training manual will include screen shots and directions on using the newer planner.



This screen is divided into two sections.

Left – **Planner Worksheet**: This section shows you the student's courses, both complete and planned.

Right – **Student Educational Planner**: This is the area where you can work out the student's future courses. At the very bottom of that list of term it will display the student's course work that's already been completed in Unplanned Terms or from Transfer Work.

Plan Notes

Term	Class	Grade
Fall 2009	CDSC 110	A
	FOUN 101	A
	GEOG 150	A-
	UCEA 102	B+
	UCCP 101	A

Transfer Classes

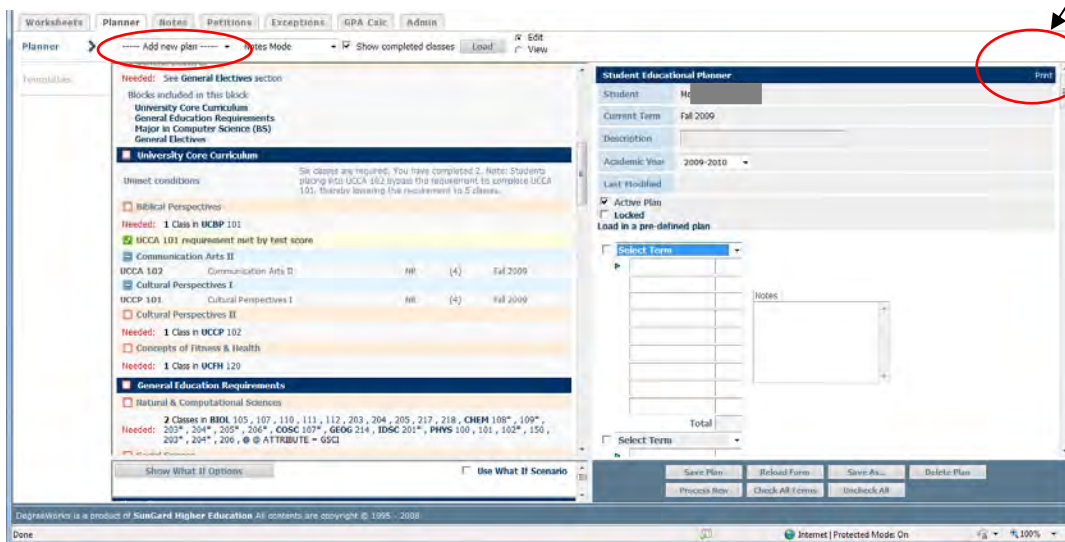
Term	Class	Grade
Fall 2009	ECON 201	P
	ECON 202	P
	HIST 218	P
	MATH 348	P
	POLS 205	P

FYI: Students can see the **Planner** but will only see the data on the right. They will not have a split screen view.

DegreeWorks Advisor Training Manual - Samford University

To create a new plan

- Make sure that "Add new plan" is in the drop down window

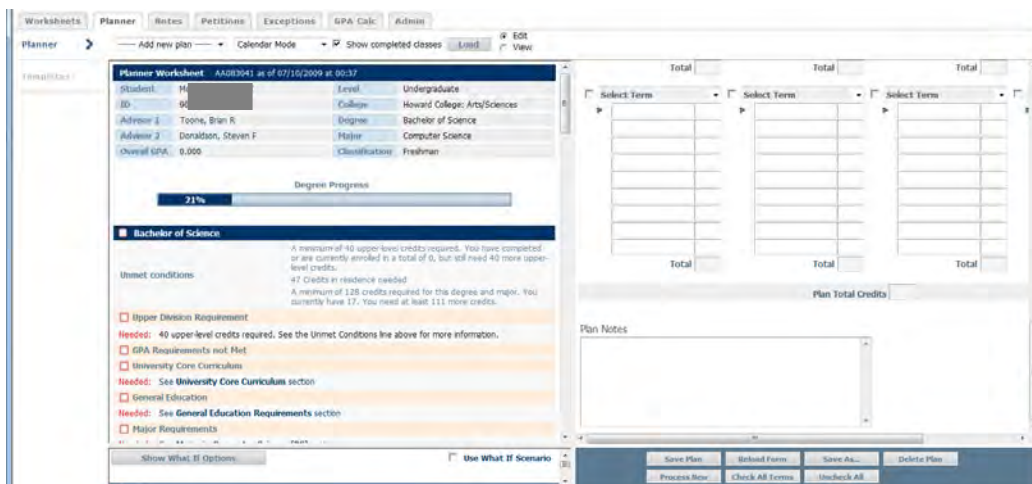


Print Button

<Note Mode

Term-by-term view with notes available for each term.

There are two different modes in which to work and save a plan. The "Note Mode" view gives the ability to add notes to each term you are working on (this is what's showing in the screen shot above) and show each term, one below the other. The other option is the "Calendar Mode" which has lines four terms across (representing an academic year), but which only provides one note box at the end of the whole planning area.



<Calendar Mode

An entire academic year view with notes available for the year.

FYI: There is also a **Print** button at the top right of the **Student Education Planner** half of the screen. However, it will likely print out blank terms in addition to planned terms, so use this button with caution as it may result in wasted paper. Twenty blank terms are provided to allow advisors/students room to document projected courses for four to five academic years (Fall, Spring, Jan Term, Summer).

Disregard this section. We use the newer Planner feature which did not exist when this training manual was first created.

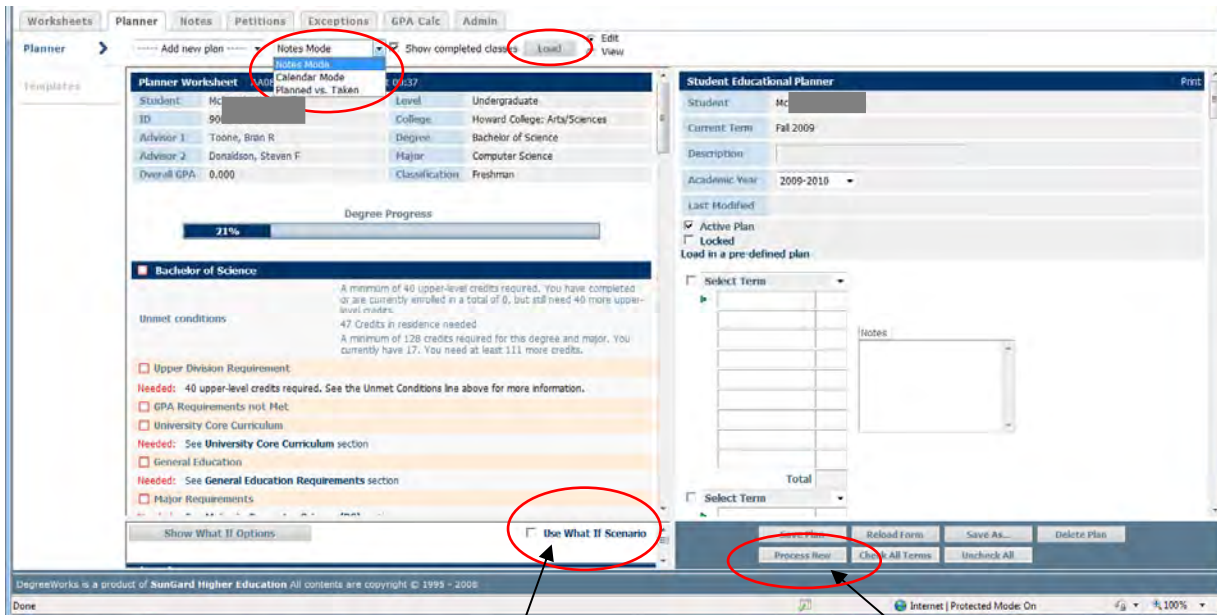
Some of the same features DO exist in the new Planner, however.

A revised training manual will include screen shots and directions on using the newer planner.

DegreeWorks Advisor Training Manual - Samford University

To switch between the modes do the following.

- Click in the "Mode" drop down list window
- Select which mode you want
- Click the **Load** button



FYI: **What If** options can also be used while working with the **Planner Worksheet** and **Student Education Planner**. If used, click **Show What If Options**, choose the desired options, hit **Process New** (bottom of screen), then **Hide What If Options** (not seen here) to see the Planner Worksheet updated with the What If Scenario in place.

To return to the student's original program, uncheck the **Use What If Scenario** box and hit Process New again.

Disregard this section. We use the newer Planner feature which did not exist when this training manual was first created.

Some of the same features DO exist in the new Planner, however.

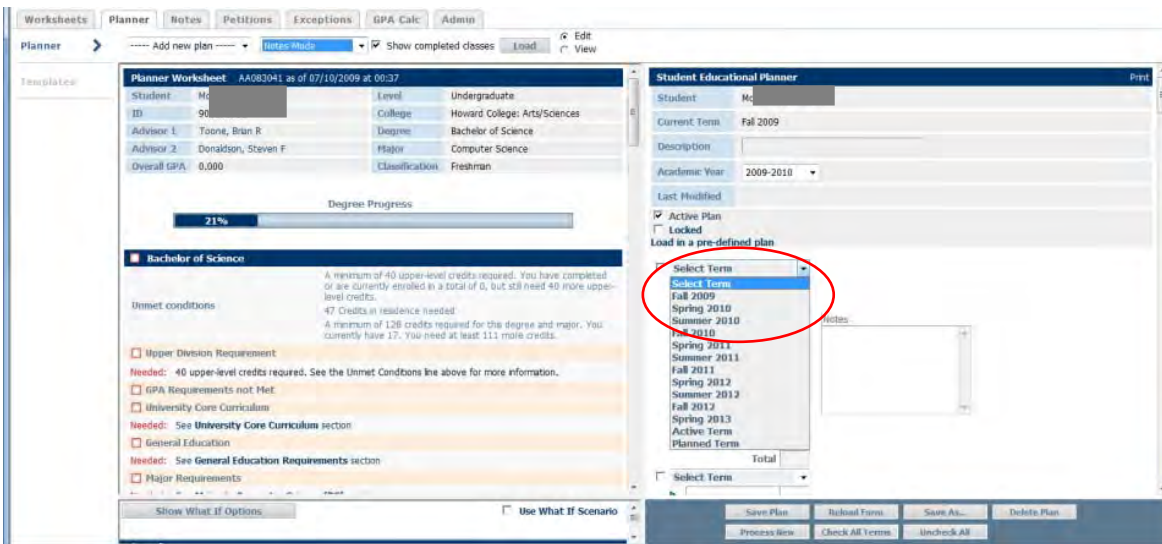
A revised training manual will include screen shots and directions on using the newer planner.

DegreeWorks Advisor Training Manual - Samford University

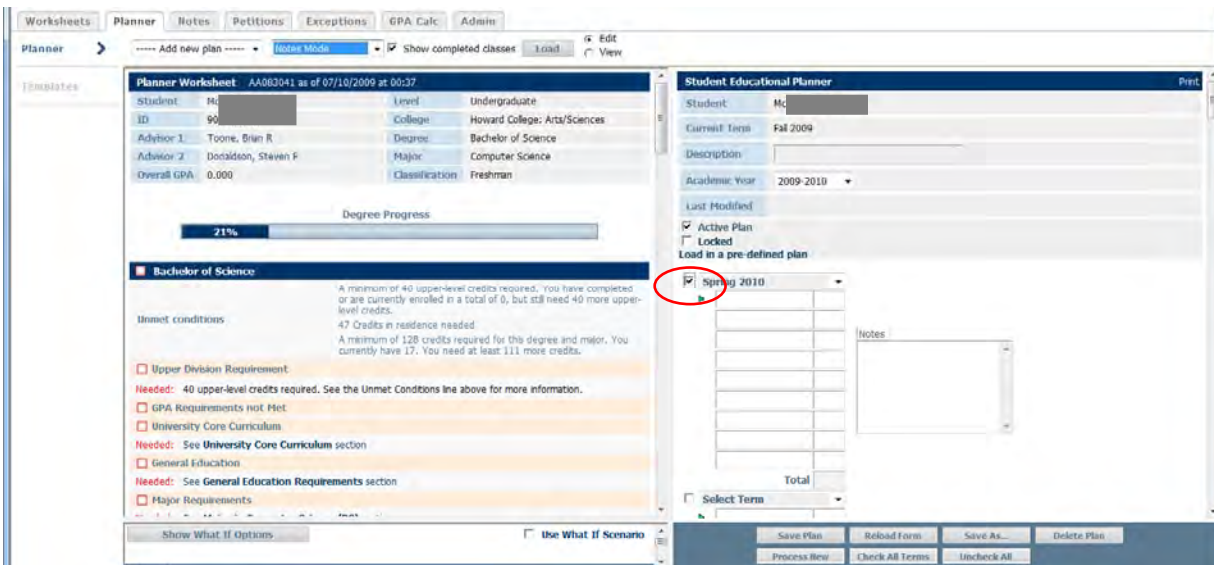
This demo will work in the **Notes Mode**.

To add a term to the planner:

- Click on the **Select Term** drop down list
- Select a term this section of the planner will represent



- Check the check box next to the **Select Term** drop down list to include this term when you run the planner.



Disregard this section. We use the newer Planner feature which did not exist when this training manual was first created.

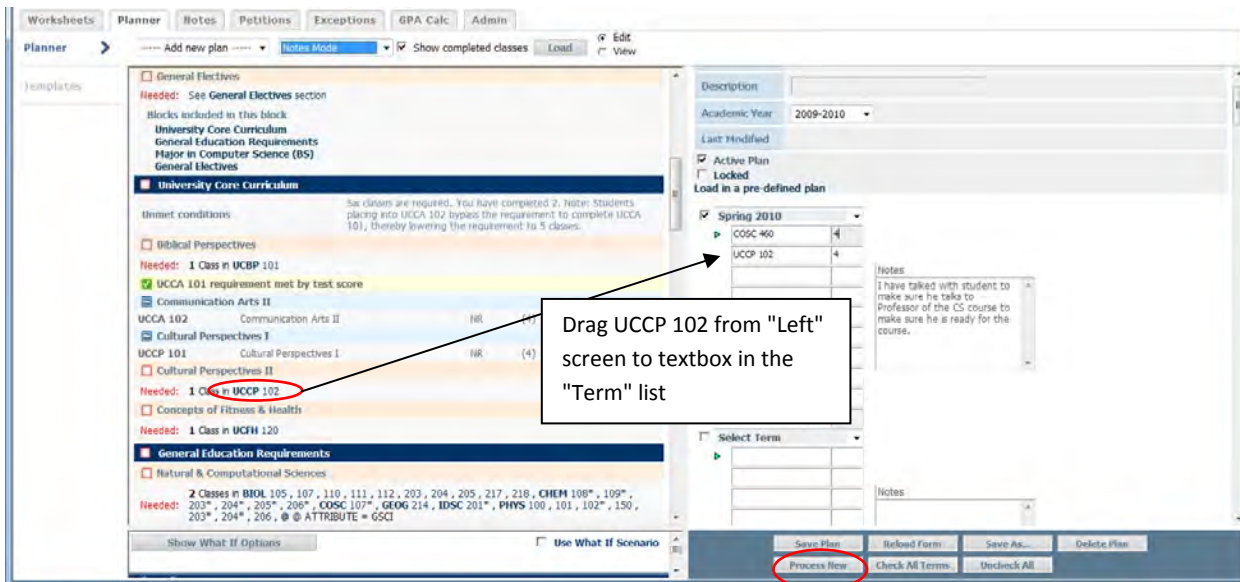
Some of the same features DO exist in the new Planner, however.

A revised training manual will include screen shots and directions on using the newer planner.

DegreeWorks Advisor Training Manual - Samford University

There are two ways to add courses to the Term list

1. Type in the Course Subject and Course Number, making sure you include a space between them, and then type in the number of credit hours for the course.
 2. Drag the course from the "Left" side of the screen to the "Right," where potential courses are listed for each section.
- You can also type in any notes you want to remember dealing with this term.
 - To see the results of this plan click the **Process New** button (at the bottom right—not the same Process New button as seen in the regular audit).



Disregard this section. We use the newer Planner feature which did not exist when this training manual was first created.

Some of the same features DO exist in the new Planner, however.

A revised training manual will include screen shots and directions on using the newer planner.

DegreeWorks Advisor Training Manual - Samford University

The results of the plan will show up on the "Left" side of the screen within the student's courses. The planned courses will show up in blue and will say "Planned Term."

The screenshot displays the DegreeWorks Advisor Planner interface. On the left, a list of courses is shown under the 'University Core Curriculum' section. The course 'UCCP 102' is highlighted in blue and labeled 'Planned Term'. The right pane shows a table of courses for 'Spring 2010' with columns for course name and credit hours. The 'Process New' button at the bottom is circled in red.

The buttons at the bottom of the form do the following:

- **Save Plan:** Saves the currently loaded plan, including terms that have check marks next to them.
- **Reload Form:** Clears the currently loaded plan, removing any courses, terms, and notes.
- **Save As:** Allows you to start with one plan, make changes, and then save the modified plan under a different name.
- **Delete Plan:** Will delete the currently loaded plan.
- **Process New:** Will run the currently loaded plan against the student's Banner data and show what the plan will do with the additional data.
- **Check All Terms:** Will place a check mark in the boxes for all the terms included in the plan, even if they don't show any data. This is a good idea to make sure that all terms are being run when you process the plan. Failure to check a term could result in an incomplete plan.
- **Uncheck All:** Unchecks all the boxes next to the terms.

Disregard this section. We use the newer Planner feature which did not exist when this training manual was first created.

Some of the same features DO exist in the new Planner, however.

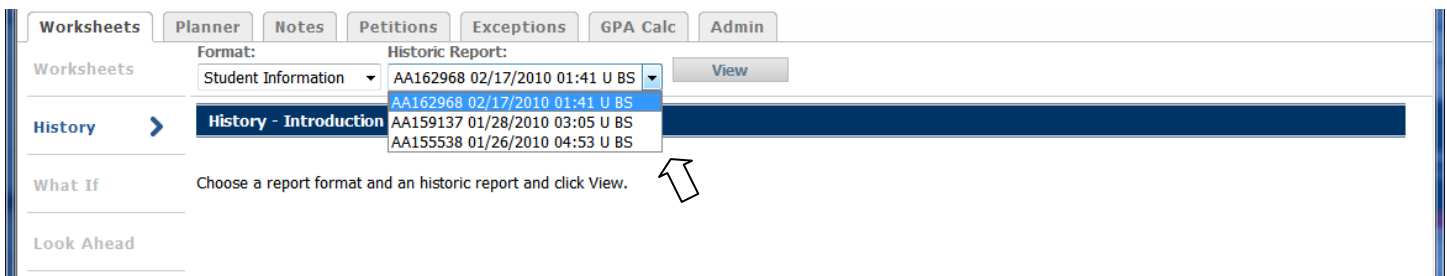
A revised training manual will include screen shots and directions on using the newer planner.

Additional Items – History, Look Ahead, Notes, GPA Calc

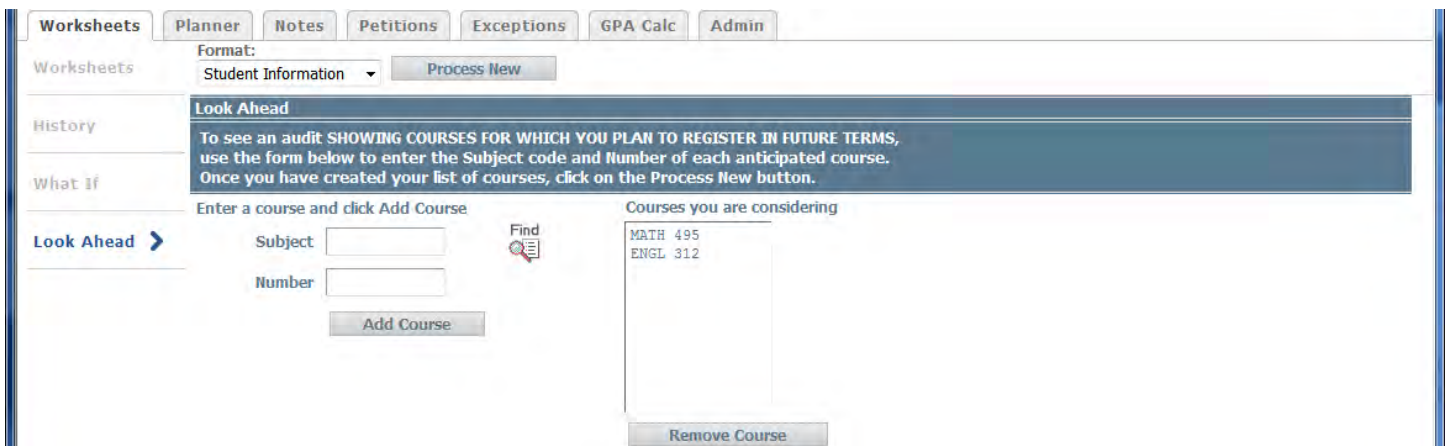
Some of the following items have been mentioned briefly already, but here are additional notes and screen shots:

History Tab – Setting allows only the last three audits to be kept in history. This is helpful when trying to discover why a course was applied in an earlier audit but not in a later one (or vice versa). While this feature is especially helpful to Student Records as we troubleshoot audit problems, it can also be beneficial for advisors and students to see how recent changes (in registration or major) affected the student's degree audit.

Keep in mind that hitting **Process New** on the main page (**Worksheets**) and batch audits processed at the server level will update the current audit and will adjust the versions retained in history, bumping the oldest one off the list. However, hitting **Process What If** or **Process New** under **Look Ahead** or in the **Student Educational Planner** does NOT impact the audit history as seen below.



Look Ahead Tab – Similar to the Student Education Planner, but not as complex or as formal, the **Look Ahead** tab allows students to experiment with their audit by factoring in possible classes:



The **Find** button on this page links to the Student Records University Catalog page. From there, students and advisors can access PDFs of the current and most recent Samford catalogs to look up a course and/or its description.

DegreeWorks Advisor Training Manual - Samford University

After hitting **Process New**, the new audit will plug in the additional course(s) in blue, with “Planned Term” noted. Now the advisor or student can see whether that additional class being considered applies to a specific degree requirement (UL credits, major, general education, etc.) or general electives.

Worksheets Back Look Ahead Courses Used: ▾

History

What If

Look Ahead >

Bachelor of Science		Academic Year: 2009-2010	Credits Required: 128
40 upper-level credits required. You currently have 6. You need 34 more upper-level credits. 64 credits must be taken in residence. You currently have 38. You need 26 more credits in residence. A minimum of 128 credits required for this degree and major. You have completed and/or are currently enrolled in a total of 57. You need at least 71 more credits.			
<input type="checkbox"/> Upper Division Requirement		(ENGL 312) Creative Writing: Poetry PL (4) Planned Term (MATH 495) Senior Project PL (2) Planned Term Still Needed: 40 upper-level credits required. See the Unmet Conditions line above for more information.	
<input checked="" type="checkbox"/> Samford 2.0 GPA Requirement Met			
<input checked="" type="checkbox"/> University Core Curriculum			
<input type="checkbox"/> General Education		Still Needed: See General Education Requirements section	
<input type="checkbox"/> Major Requirements		Still Needed: See Major in Computer Science (BS) section	
<input type="checkbox"/> General Electives		Still Needed: See General Electives section	

History

What If

Look Ahead >

General Education Requirements						
<input checked="" type="checkbox"/> NATURAL & COMPUTATIONAL SCIENCES		COSC 107	Intro to Computer Science	NR	(4)	Spring 2010
		GEOG 150	Physical Geography	A-	4	Fall 2009
<input checked="" type="checkbox"/> SOCIAL SCIENCE		ECON 201	Principles of Macroeconomics	P	4	Fall 2009
		Satisfied by ECON201 - Advanced Placement Program				
<input checked="" type="checkbox"/> MATHEMATICS		(MATH 495)	Senior Project	PL	(2)	Planned Term

History

What If

Look Ahead >

General Electives						
General elective credits vary by degree. The addition of a minor or cognate will reduce the number of general elective credits required for this program. Please note, however, that credits for the minor will also appear in this block. The addition of a second minor, major, or degree will waive the general electives requirement. For students pursuing dual degrees, the requirement line may remain visible. NOTE ON CREDITS: General elective credits in this degree audit may have been increased to allow for the inclusion/display of language 101, 102, &/or 201, if applicable to the student's program. Students who test out of UCCA 101 may need to complete an additional four general elective credits to meet the minimum overall hours required for their degree.						
<input type="checkbox"/> General Electives allowed: 28-40 Credits		ECON 202	Principles of Microeconomics	P	3	Fall 2009
		Satisfied by ECON202 - Advanced Placement Program				
		(ENGL 312)	Creative Writing: Poetry	PL	(4)	Planned Term
		FOUN 101	Foundations	A	1	Fall 2009
		HIST 218	Modern America Since 1865	P	4	Fall 2009
		Satisfied by HIST218 - Advanced Placement Program				
		(MATH 495)	Senior Project	PL	(2)	Planned Term
		POLS 205	Intro To American Politics	P	4	Fall 2009
		Satisfied by POLS205 - Advanced Placement Program				
		Still Needed: 16 credits in an approved Applications Area (required for Computer Science Majors). See your advisor for more information.				

The courses being considered are not term-specific, but if the course number or prefix doesn't exist, it will be kicked to the bottom of the Look Ahead audit.

Not Counted		Credits Applied: 0	Classes Applied: 1
ESPS 207	-Course not found in system-	PL	0 Planned Term

DegreeWorks Advisor Training Manual - Samford University

Notes Tabs – Advisors can add, modify, and delete their own notes, but cannot alter the notes of others. Students do not have access to this tab, but can see notes written by others within the Planner and/or at the bottom of their audit, so keep this in mind when adding notes.

Notes	Created By	Create Date
Student was advised to register for the courses listed on the Planner.	Roberts, Robin W	10/07/2009
	Galloway, Ryan W	10/07/2009

Add notes using either predefined selections or free form text (just choose any predefined note and wipe out the text, adding your custom note). If there is a strong demand for a new standard entry, we can add it to the list. **Let Student Records know if you would like a predefined note added to this drop down list.**

Add New Note
Enter your note and click the Save Note button

Choose a predefined note from the list below

- Choose a predefined note from the list below
- Student was advised to register for the courses listed on the Planner.
- Student and advisor discussed student's career plans.
- Student was advised to apply for graduation by the official deadline.
- Student was advised to consider financial aid consequences before withdrawing from any course.
- Faculty advisor referred the student to the Financial Aid Office.
- Student was advised to...

Save Note Clear

Student's Audit w/Notes at the Bottom

Notes	Entered by	Date
Student was advised to register for the courses listed on the Planner.	Roberts, Robin W	10/07/2009
	Galloway, Ryan W	10/07/2009

Disclaimer
You are encouraged to use this degree audit report as a guide when planning your progress toward degree completion of the above requirements. Your academic advisor or the Student Records 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 Student Records Office regarding this degree audit report, your official degree/certificate completion status, or to obtain a copy of your academic transcript. Application for an undergraduate degree should be made in the semester prior to the term in which you expect to graduate. See the application for exact deadlines. [Click here](#) for more information.

DegreeWorks Advisor Training Manual - Samford University

GPA Calc Tab – There are three variations on the GPA calculator: **Graduation**, **Term**, and **Advice**.

Graduation Calculator

The student's current Samford GPA will automatically be entered, so users must enter data into the remaining three fields and click **Calculate**.

Note: The **Credits Required** link points to a document that's currently in process, listing all Samford degree programs and overall credits. Once the document is completed, it will be posted to the Web.

Current GPA	3.765
Credits Remaining	111
Credits Required	128
Desired GPA	4

Calculate

Advice will display based on the settings.

Current GPA	3.765
Credits Remaining	111
Credits Required	128
Desired GPA	4

Error: To achieve your desired GPA, you would need to average higher than a 4.0. You would need to average a 4.035.

Recalculate

DegreeWorks Advisor Training Manual - Samford University

Term Calculator

This screen plugs in the student's current Samford GPA, Samford hours completed so far, and the courses/credits hours in which the student is currently enrolled. Students should choose the grade they think they will earn for each class from the drop down list and click **Calculate**. (They can also add a course they might be considering but for which they haven't yet registered.)

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

Graduation Calculator

Term Calculator >

Advice Calculator

Current GPA: 3.765
Credits Earned So Far: 17

Class	Credits	Grade
COSC 107	4	B+ [3.300]
PHED 118	1	A [4.000]
UCBP 101	4	C+ [2.300]
UCCP 102	4	B- [2.700]
UCFH 120	2	A- [3.700]
Class 6		A [4.000]
Class 7		A [4.000]
Class 8		A [4.000]
Class 9		A [4.000]
Class 10		A [4.000]

Calculate

A new projected GPA will then be displayed.

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

Graduation Calculator

Term Calculator >

Advice Calculator

Current GPA: 3.765
Credits Earned So Far: 17

Class	Credits	Grade	Quality Points
COSC 107	4	B+	3.300
PHED 118	1	A	4.000
UCBP 101	4	C+	2.300
UCCP 102	4	B-	2.700
UCFH 120	2	A-	3.700

Calculated GPA: 3.393

By achieving the grades listed here, your GPA at the end of the term will be 3.393

Recalculate

DegreeWorks Advisor Training Manual - Samford University

Advice Calculator

A simpler version than the Graduation Calculator, this screen plugs in the student's current Samford GPA and Samford hours completed. Students should enter their desired GPA and click **Calculate**. Advice will be displayed depending on the desired GPA and the chances—or unrealistic chances—of meeting that goal. Note: Although the GPA and hours are already plugged in, these fields can be revised.

The screenshot shows the 'Advice Calculator' interface. At the top, there are navigation tabs: Worksheets, Planner, Notes, Petitions, Exceptions, GPA Calc (selected), and Admin. On the left, there are links for 'Graduation Calculator', 'Term Calculator', and 'Advice Calculator' (with a right-pointing arrow). The main area contains three input fields: 'Current GPA' with the value 3.765, 'Credits Earned' with the value 17, and 'Desired GPA' which is empty. A 'Calculate' button is located below these fields.

One example of advice:

This screenshot shows the result of a calculation. The 'Current GPA' is 3.765, 'Credits Earned' is 17, and the 'Desired GPA' is 3.65. The text reads: 'To achieve your desired GPA, you need one of the following:'. A white arrow points to the following list of options:

- 5 Credits at 3.300 (B+) grade average
- 3 Credits at 3.000 (B) grade average
- 2 Credits at 2.700 (B-) grade average
- 1 Credits at 2.300 (C+) grade average
- 1 Credits at 2.000 (C) grade average
- 1 Credits at 1.700 (C-) grade average

Below the list, a note states: 'Note: Results that would require you to take more than 150 Credits have been omitted.' A 'Recalculate' button is at the bottom.

Another example of advice (after having altered the number of credits):

This screenshot shows an error message. The 'Current GPA' is 3.765, 'Credits Earned' is 35, and 'Desired GPA' is 4. The text reads: 'Error: Achieving your desired GPA is not possible or not realistic. It would require too many Credits'. A white arrow points to the 'Recalculate' button.