Standard Screen Items in DegreeWorks

Navigation Tabs in the Header – Most of the tabs are self-explanatory, but here are a 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.
**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.
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).
**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

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<td>4</td>
</tr>
<tr>
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</tr>
</tbody>
</table>

**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.

**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.
Logging In

- Go to the Samford Portal: [https://portal.samford.edu/cp/home/displaylogin](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.)
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
• 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
- 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.

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.
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**

**Petitions tab (Not available at this time)**

**Planner tab**

**GPA Calc tab**

**Notes tab (Not available to Students)**
**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

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.
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**.
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**
**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 **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.
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.
**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.
**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.

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

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

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.

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.
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.
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

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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.
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).

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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.
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 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.
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.

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.
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.

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.

Student’s Audit w/Notes at the Bottom
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.

Advice will display based on the settings.
**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.)

A new projected GPA will then be displayed.
**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.

One example of advice:

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