



Automating the Grad Check Process

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Alabama Banner Users Group 2018 Spring Workshop

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Modernizing the Grad Checkout Process Using Degree Works

- 1) The way things were
- 2) The good(ish) data age
- 3) The way things are
- 4) Making DegreeWorks work for you
- 5) Petitions: Bringing the Process into DW
- 6) Reporting: Making the Process Scalable
- 7) Indexing: Closing the Circle

The Way Things Were

- Assistant Registrar did all scribing, while also maintaining the academic catalog and maintenance of course catalog
- Graduation Checkout Coordinator managed all grad checkouts via a paper process with advisors and a giant Excel spreadsheet
- Grad App was a paper form...
- DW not built out because staff resources spread too thin

...And Those Grad Checkouts...

- Responsibility of advisors for each graduating student
- Registrar staff (one person) checked each one
- All done on paper and Excel – tremendous duplication



Getting to Good(ish) Data

- DW needed a relaunch across campus to address:
 - Poor initial launch on campus and use was optional
 - Inadequate staffing devoted to DW
 - Inefficiencies in business processes
- DW could no longer be optional, but it also meant our office had to hold up our end of the bargain and get things scribed
- Communication, especially with key stakeholders and DW advocates across campus, is key

The Way Things Are Now

- Students apply to graduate via SSB
- Reporting to identify:
 - a) Those who intend to graduate
 - b) Those who meet requirements for graduation
- Petitions submitted and approved through DW
- Audits batch saved as PDFs and indexed to BDMS

Making DegreeWorks Work For You

Student Information AA728kzO as of 02/27/2018 at 16:02

Student	Test, Samfordstudent Su	College/School	Howard College: Arts/Sciences
ID	900207443	Degree	Bachelor of Science (BS)
Advisor	Keppley, Jesse M	Major	Biochemistry
Level	Undergraduate	Minor	
Classification	Sophomore	Concentrations	
Catalog Year	2013	Academic Status	
Expected Grad Term	201850	Transfer Hours	51
Samford GPA	3.300	Samford Hours	4
Overall GPA	3.493	Overall Hours	55
Major 1 GPA	3.000	Minor 1 GPA	
Major 2 GPA		Minor 2 GPA	
Registration Hold	NO	Graduation Application	CLICK HERE
Graduation Hold	NO	Graduation App Status	
Graduation Date		Degree Awarded	

Minor 2 GPA	
Graduation Application	CLICK HERE
Graduation App Status	Grad App Submitted
Degree Awarded	

Graduation Date	16-DEC-2017	Degree Awarded	MSN
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Making DegreeWorks Work For You



NOTE ABOUT DEGREE PROGRESS PERCENTAGES:

- 0-97% means the program is in progress, but not complete.
- 98% typically means courses in progress need to be completed to satisfy the final degree requirements.
- 99% means that most requirements are complete, but a qualifier is not (usually a credit issue in an individual block).
- 100% means all program requirements have been met.

Be sure to read notes about any "unmet conditions" for more information.

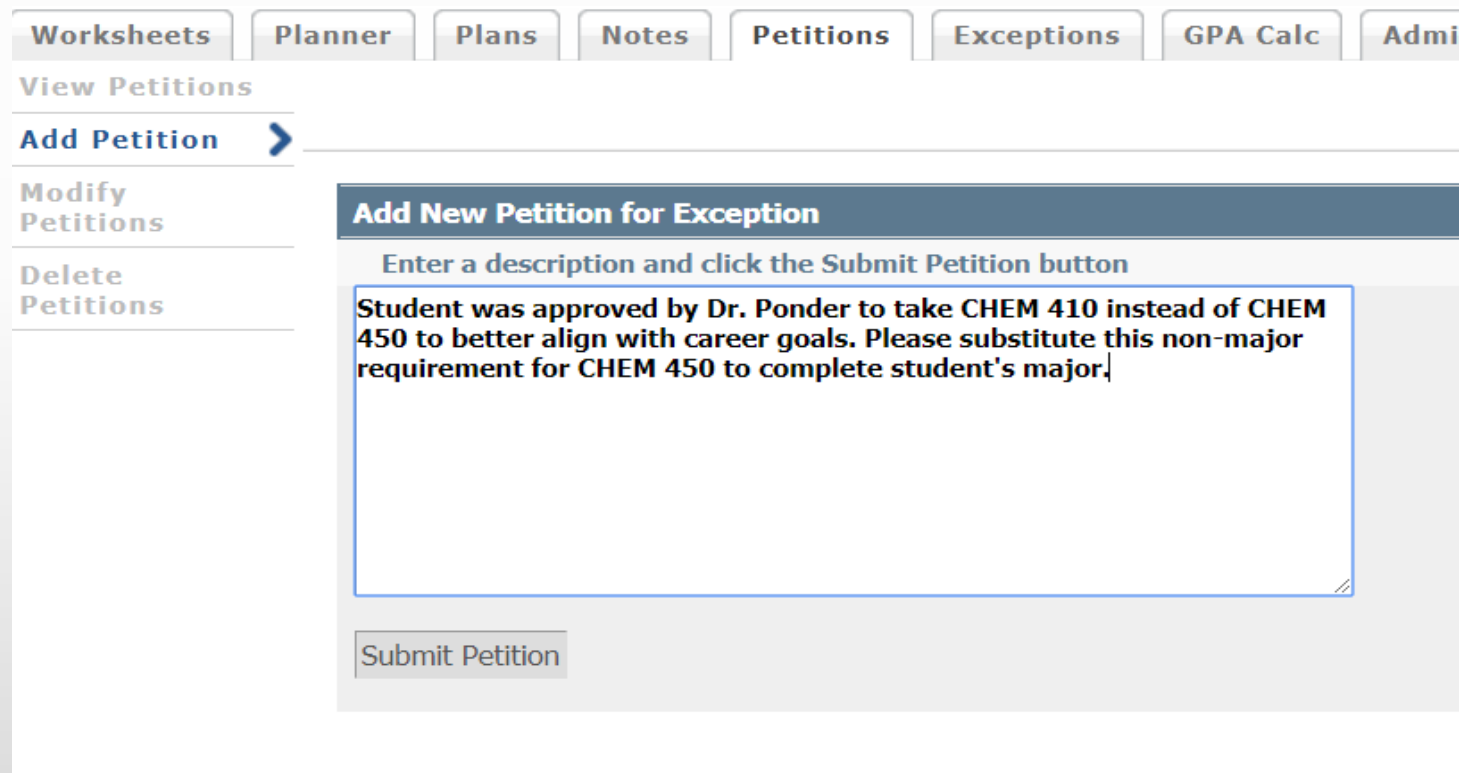
- Degree Progress is a rough estimate of overall student progress
- As it gets closer to graduation, the progress bar becomes more meaningful
- Customize messaging so it is meaningful for advisor and for student

Petitions: Bringing the Process into DW

- Paper grad checks often marked up with notes from advisor
- Petitions bring exception management into the Grad Check process
- Exception types: Force complete, Substitute, Also Allow, Apply Here, Remove Course or Change Limit managed via petitions

Petitions, cont.

- Advisors given access to submit petitions for their students:

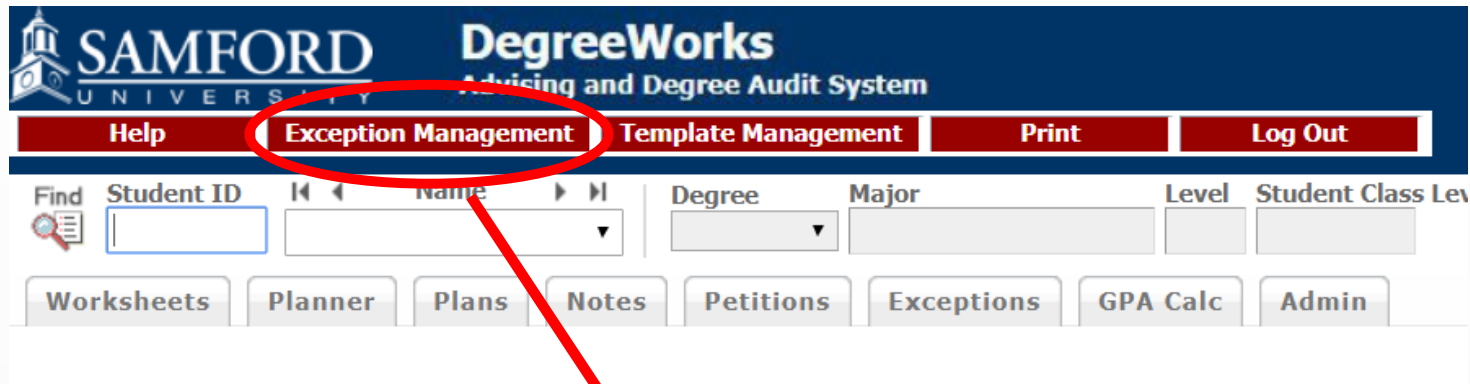


The screenshot shows a web interface with a top navigation bar containing buttons for Worksheets, Planner, Plans, Notes, Petitions, Exceptions, GPA Calc, and Admi. Below this is a sidebar with links for View Petitions, Add Petition (with a right arrow), Modify Petitions, and Delete Petitions. The main content area is titled 'Add New Petition for Exception' and includes the instruction 'Enter a description and click the Submit Petition button'. A text area contains the text: 'Student was approved by Dr. Ponder to take CHEM 410 instead of CHEM 450 to better align with career goals. Please substitute this non-major requirement for CHEM 450 to complete student's major.' Below the text area is a 'Submit Petition' button.

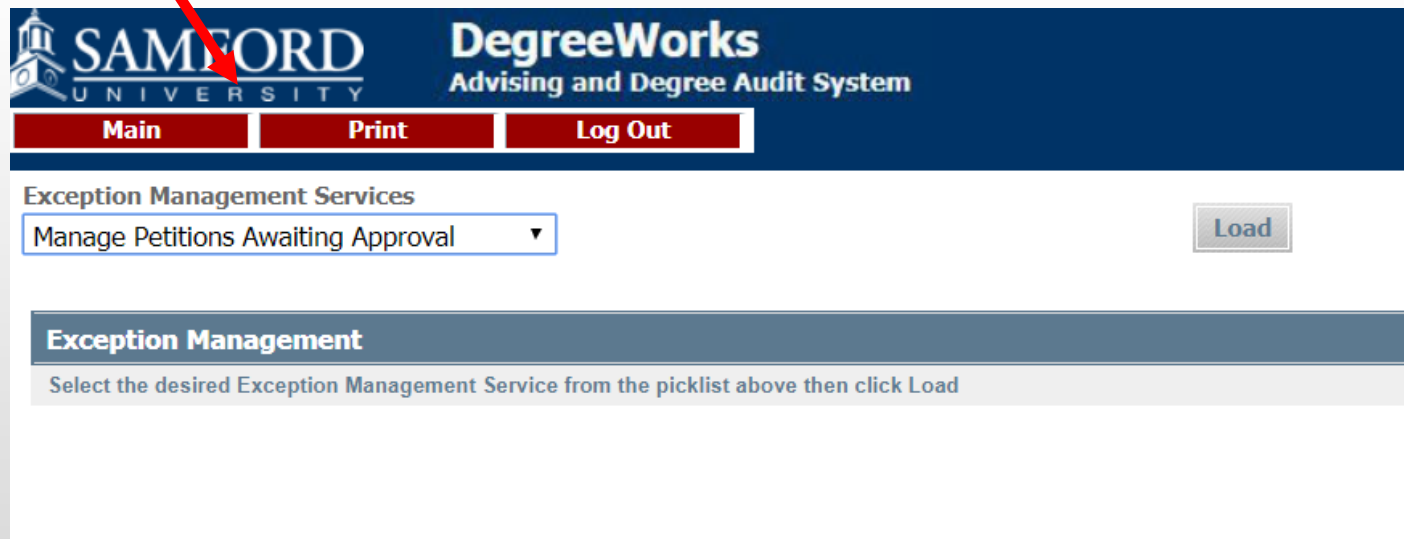
Petitions, cont.

- After advisor does their job, our office gets notified of petition awaiting approval
- Assistant Registrar receives daily email notifying her if any petitions need approval
- Advisor is also notified when the petition gets approved by our office
- Caveat: Email only sends notes for last approved petition. Can create confusion when student has multiple petitions. Our staff adjusted process to put all notes in final approval so advisor had the whole picture

Approving Petitions



The screenshot shows the top navigation bar of the DegreeWorks system. The SAMFORD UNIVERSITY logo is on the left. The main title is "DegreeWorks Advising and Degree Audit System". Below the title is a red navigation bar with buttons for "Help", "Exception Management", "Template Management", "Print", and "Log Out". The "Exception Management" button is circled in red. Below the navigation bar is a search area with fields for "Student ID", "Name", "Degree", "Major", "Level", and "Student Class Lev". There are also buttons for "Worksheets", "Planner", "Plans", "Notes", "Petitions", "Exceptions", "GPA Calc", and "Admin". A red arrow points from the "Exception Management" button to the second screenshot.



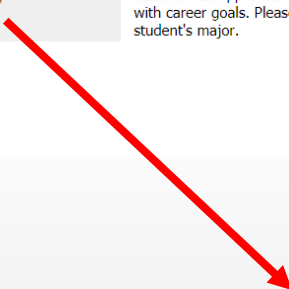
The screenshot shows the "Exception Management Services" page. The top navigation bar is the same as in the first screenshot, but the "Main", "Print", and "Log Out" buttons are visible. Below the navigation bar is a section titled "Exception Management Services" with a dropdown menu showing "Manage Petitions Awaiting Approval" and a "Load" button. Below this is a section titled "Exception Management" with the instruction: "Select the desired Exception Management Service from the picklist above then click Load".

Approving Petitions

Can approve and deny petitions, as well as leave comments:

Exception Management Services
Manage Petitions Awaiting Approval

Petitions Waiting Approval							Refresh
Approve	Reject	Comments	Description	Id	Name	Advisor	Create Date
<input type="radio"/>	<input type="radio"/>	<input type="checkbox"/>	Jesse's test petition - Michelle is changing this one	900207443	Test, Samfordstudent Su	Keppley, Jesse M	02/06/2017
<input type="radio"/>	<input type="radio"/>	<input type="checkbox"/>	1. Apply GEOG 101 to ENGL electives. 2. Petition 1 3. Petition 2 4. Petition 3	900207443	Test, Samfordstudent Su	Joiner, Michelle H	09/06/2017
<input type="radio"/>	<input type="radio"/>	<input checked="" type="checkbox"/>	Student was approved by Dr. Ponder to take CHEM 410 instead of CHEM 450 to better align with career goals. Please substitute this non-major requirement for CHEM 450 to complete student's major.	900207443	Test, Samfordstudent Su	Keppley, Jesse M	03/02/2018



Process Awaiting Petition - Google Chrome

about:blank

Process Petition Awaiting Approval

Student	Test, Samfordstudent Su	Advisor	Keppley, Jesse M
ID	900207443	Create Date	03/02/2018
Request	Student was approved by Dr. Ponder to take CHEM 410 instead of CHEM 450 to better align with career goals. Please substitute this non-major requirement for CHEM 450 to complete student's major.		
My comments	Looks good. This satisfies the student's final requirement		

And Applying the Exception

- Literally hundreds of petitions received, so need to be able to apply substitutions/exceptions efficiently:

Main **Print** **Log Out**

Exception Management Services
Apply Approved Petitions

Approved Petitions

Apply	Description
<input checked="" type="checkbox"/>	LAW 800 for writing class.
<input checked="" type="checkbox"/>	Substitute UCCA 102 for HIST 499
<input checked="" type="checkbox"/>	Not approved for graduation. Needs: 1 credit hour & Graduation date moved to December 2017.]
<input checked="" type="checkbox"/>	Jesse's test petition - Michelle is changing this one
<input checked="" type="checkbox"/>	Please check this URL for more info: http://www2.s back through; would like a comment [APPROVAL COMMENT exception, the comment feature. Best so that mo
<input checked="" type="checkbox"/>	Cleared to graduate; This is a test. This was approve nothing else was done to it. [APPROVAL COMMENT gets re-routed back to the Awaiting Approval pool.]
<input checked="" type="checkbox"/>	Or e-mail this person: jeleask@samford.edu send this this. It's best to use the comment icon in SOME cases approval/rejection status.]
<input checked="" type="checkbox"/>	ACC 310 is not required. Please remove and adjust
<input checked="" type="checkbox"/>	1. Apply GEOG 101 to ENGL electives. 2. Petition 1
<input checked="" type="checkbox"/>	Student was approved by Dr. Ponder to take CHEM goals. Please substitute this non-major requirement [APPROVAL COMMENTS: Looks good. This satisfies

Secure | https://degreeworkstest.samford.edu:8443/DashboardServlet-4.1.6/dashboard

Student: Test, Samfordstudent Su ID: 900207443 [Update petition and close]

Exception Request: Student was approved by Dr. Ponder to take CHEM 410 instead of CHEM 450 to better align with career goals. Please substitute this non-major requirement for CHEM 450 to complete student's major. [APPROVAL COMMENTS: Looks good. This satisfies the student's final requirement]

Exception Types: Force Complete [Load] [Remove Exception] [Run New Audit]

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

- GLOBAL EXCEPTION - applies to all requirements
- Bachelor of Science

Unmet conditions for this set of requirements: 64 credits must be taken in residence. You currently have 6. You need 58 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.

Block Qualifiers:

- MaxClasses 0 in @ @ (With DWSCHOOL = E)
- MaxClasses 0 in NOCR @
- MaxClasses 0 in GENL @ (With DWCREDS = 0)
- MAXPASSFAIL 12 Credits
- MaxCredits 8 in DANC 100:302, MUSC 1720:1723, 1730:1733, 1739, 1740, 3720:3723, 3730:3733, 3739, PHED 101:153, THEA 201, @ @ (With ATTRIBUTE = ERST)

Refresh	Create Date
	John J 08/05/2015
	John J 02/03/2017
	John J 02/06/2017
	Jesse M 02/06/2017
	Barbara H 02/07/2017
	Barbara H 02/07/2017
	Barbara H 02/07/2017
	Michelle H 09/06/2017
	Michelle H 09/06/2017
	Jesse M 03/02/2018

Petitions, cont.

- Everything is managed in DW and can be modified as necessary

Exception Management Services

View Petitions Applied as Exceptions ▼ Load

Petitions Applied as Exceptions - since 01/31/2018

Delete	Description
<input type="checkbox"/>	1. Substitute Musc 200, Nurs 110 and Foun 102 for the Biol 105 requireme nt. Jan P. 2. BSN projected Spring 2018
<input type="checkbox"/>	Graduates BSN Spring 2018 Jan Paine
<input type="checkbox"/>	Graduates BSN Spring 2018 Jan Paine
<input type="checkbox"/>	Graduates BNF Spring 2018 Jan Paine
<input type="checkbox"/>	1. Substitute Biol 203 for Biol 105 2. BSN projected Spring 2018

Exception Management Services

Fix Petition Status ▼ Load

Fix Petitions Status

Change	Description
Applied ▼	1. Substitute Musc 200, Nurs 110 and Foun 102 for the Biol 105 requireme nt. Jan P. 2. BSN projected Spring 2018
Applied ▼	Graduates BSN Spring 2018 Jan Paine
Applied ▼	Graduates BSN Spring 2018 Jan Paine
Applied ▼	Graduates BNF Spring 2018 Jan Paine
Applied ▼	1. Substitute Biol 203 for Biol 105 2. BSN projected Spring 2018

Exception Management Services

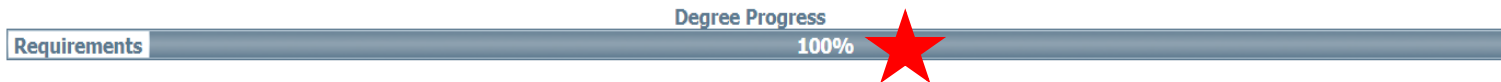
View Rejected Petitions ▼

Rejected Petitions - since 01/31/2018

Delete	Description
<input type="checkbox"/>	A grad check has been completed on this student for Summer 2018. Student plans to walk in May 2018. [REJECTION REASON: ***I have not received a walk early form from this student as of 2/16/18.***]
<input type="checkbox"/>	A grad check has been completed on this student for May 2018. [REJECTION REASON: ***I notice that Degree Works is still looking for PSYC 101 in the Gen Ed block.***]
<input type="checkbox"/>	A grad check has been completed on this student for May 2018. [REJECTION REASON: ***I haven't received any additional paperwork or information a bout the other Fine Arts requirement for this student.***]

Get to Green

- Goal is a totally green audit



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Be sure to read notes about any "unmet conditions" for more information.

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 | | |

<input checked="" type="checkbox"/> Bachelor of Music Education	Academic Year: 2012-2013	Credits Required: 141
	GPA: 3.778	Credits Applied: 160
<input checked="" type="checkbox"/> Samford 3.0 GPA Requirement Met		
<input checked="" type="checkbox"/> Upper Level Credit Requirement		
<input checked="" type="checkbox"/> University Core Curriculum		
<input checked="" type="checkbox"/> General Ed Reqs-School of the Arts (BME)		
<input checked="" type="checkbox"/> Major Requirements		

Reporting: Making the Process Scalable

- Scaling up this process requires good reporting
- Harder to report out of DW- relied heavily on our Tech Services team and lots of testing
- Required build out of SureCode Ban 80 tables
- And most importantly, you must be able to trust you own DegreeWorks data

Reporting, cont.

 **DEGREEWORKS UNDERGRADUATE REPORT**
DAP_AUDIT_DTL

Excluded pre degrees that are non-awardable (eg. NMN)

Select SHAGAPP GRAD Term Select Undergraduate Degree(s) Select School(s) Select Class(s)

201620
201650
201670
201720
201750
201770
201820
201850
201870
201920
201950
201970
202020
202050
202070

BM
BME
BMF
BNF
BS
BSE
BSF
BSN
CRW
MAC
MPH

School	School_code
Howard College: Arts/Sciences NY	... AS
Brock School of Business NY	... BB
School of Public Health NY	... CP
Beeson School of Divinity NY	... DV
English 2nd Language Bridge NY	... EB
Orlean Beeson School of Educ NY	... ED
General University NY	... GU
School of Health Professions NY	... HP
Cumberland School of Law NY	... LW
Z-Evening Studies NN	... MP
Ida Moffett School of Nursing NY	... NU
Other School NN	... OS
McWhorter School of Pharmacy NY	... PM
School of the Arts NY	... SA
Undeclared NY	... UN
Z-School of Business (OLD) NN	... BA

16 items, 14 selected

FR
JR
SS
SO
SR

Reporting, cont.

- We can now process a large number of students quickly and easily.
- 0-96%: Significant issues student needs to address
- 97%: May be an issue. Student likely missing a substitution/exception
- 98%: Student will meet all requirements provided they pass all enrolled courses
- 99%: May be a problem. Missing qualifier (may be short total credits, GPA, etc)

TERM	LEVEL	School	DEGREE	CLASS	PCT	GPA	SHAGA1	EXP_GR	Degree	BLOCK1	VALUE1	PCT1	GPA1	BLOCK2	VALUE2	PCT2	G
201820	U	BB	BBA	SR	96	2.71	201820	201850		DEGREE	BBA	96	2.71	MAJOR	MARK	90	
201820	U	AS	BA	S5	98	2.786	201820	201820		DEGREE	BA	98	2.786	MAJOR	PADM	100	
201820	U	SA	BFA	SR	98	3.251	201820	201820		DEGREE	BFA	98	3.251	MAJOR	MTFA	98	
201820	U	SA	BM	SR	98	3.304	201820	201820		DEGREE	BM	98	3.304	MAJOR	MWOR	98	
201820	U	NU	BSN	S5	98	3.248	201820	201820		DEGREE	BSN	98	3.248	MAJOR	NUAS	98	
201820	U	NU	BSN	S5	98	3.248	201820	201820		DEGREE	BSN	98	3.248	MAJOR	NUAS	98	
201820	U	AS	BA	SR	97	3.967	201820	201820		DEGREE	BA	97	3.967	MAJOR	PSYC	98	
201820	U	AS	BA	SR	98	3.509	201820	201820		DEGREE	BA	98	3.509	MAJOR	JMC	98	
201820	U	AS	BA	SR	98	3.454	201820	201820		DEGREE	BA	98	3.454	MAJOR	IREL	98	
201820	U	BB	BBA	SR	98	3.552	201820	201820		DEGREE	BBA	98	3.552	MAJOR	ENTR	98	
201820	U	NU	BSN	S5	98	3.704	201820	201820		DEGREE	BSN	98	3.704	MAJOR	NUAS	98	
201820	U	AS	BS	S5	98	3.047	201820	202220		DEGREE	BS	98	3.047	MAJOR	BIOL	98	
201820	U	NU	BSN	SR	97	2.578	201820	201820		DEGREE	BSN	97	2.578	MAJOR	NURS	98	
201820	U	AS	BA	SR	99	3.473	201820	201820		DEGREE	BA	99	3.473	MAJOR	COMS	98	
201820	U	AS	BA	SR	99	3.473	201820	201820		DEGREE	BA	99	3.473	MAJOR	COMS	98	
201820	U	NU	BSN	SR	98	3.513	201820	201820		DEGREE	BSN	98	3.513	MAJOR	NURS	98	
201820	U	HP	BS	SR	98	3.36	201820	201820		DEGREE	BS	98	3.36	MAJOR	HESC	98	
201650	U	AS	BS	SR	91	3.594	201820	201820		DEGREE	BS	91	3.594	MAJOR	EGPH	71	

Indexing: Closing the Circle

- Remember that cabinet full of grad checks? We needed a way to bring that into DW as well
- Use Transit job to batch pdf all audits for graduated student
- Tech Services runs job to index audits to BDMS

Next steps

- Enhance reporting so that it can be delivered to advisors in a meaningful and useful format
- Work to incorporate graduate programs into process
- Push Student Educational Planner functionality to use DW to anticipate course demand???????

Technical notes

- Degreeworks version 4.1.4
 - Petitions
 - Keys
 - SDPETVIEW – View petitions
 - SDPETMYS – My petitions
 - SDPETADD – Add petitions
 - SDPETDEL – Delete petitions
 - SDPETMOD – Modify petitions
 - Email notifications
 - Petsend – located in /app/scripts/petsend
 - Argos report
- BDMS 7.0 SP1
 - Index Image Import Wizard
 - Argos generated control file



Thank You!

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