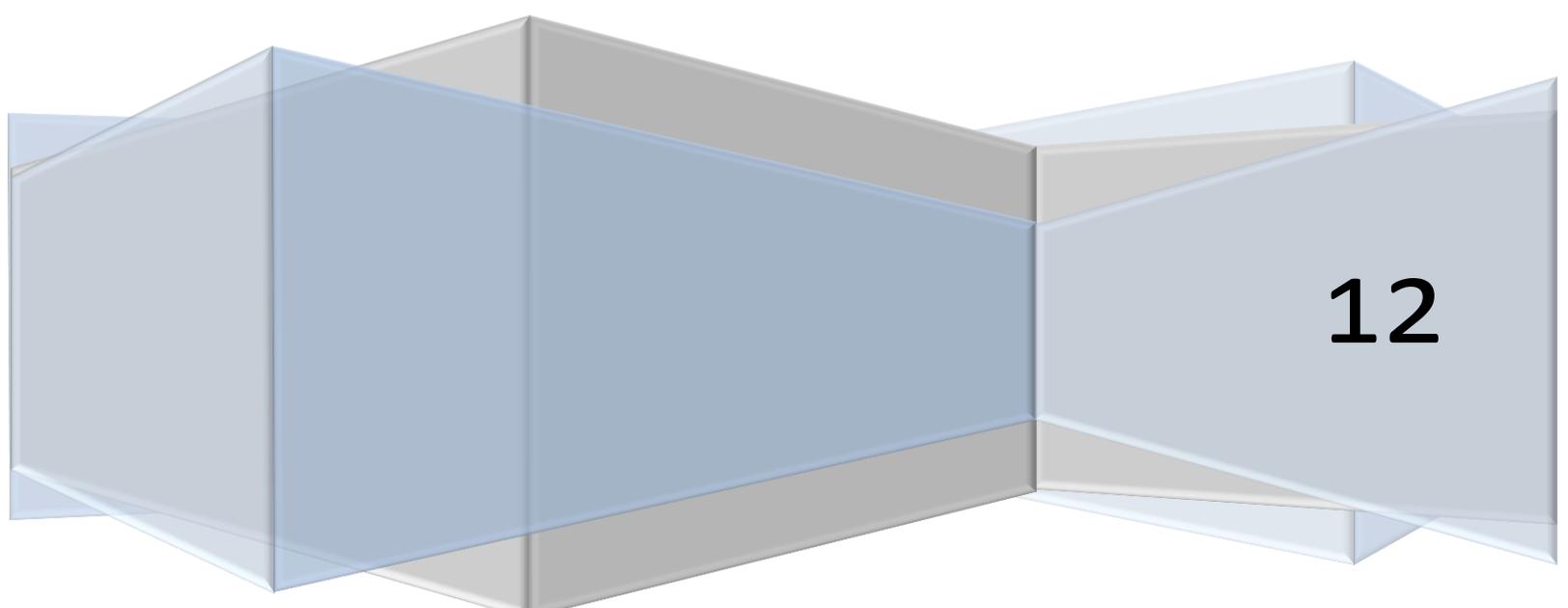


**SUNY Cobleskill**

# **DegreeWorks**

**Advisor User Manual**

**SUNY Cobleskill**



**12**

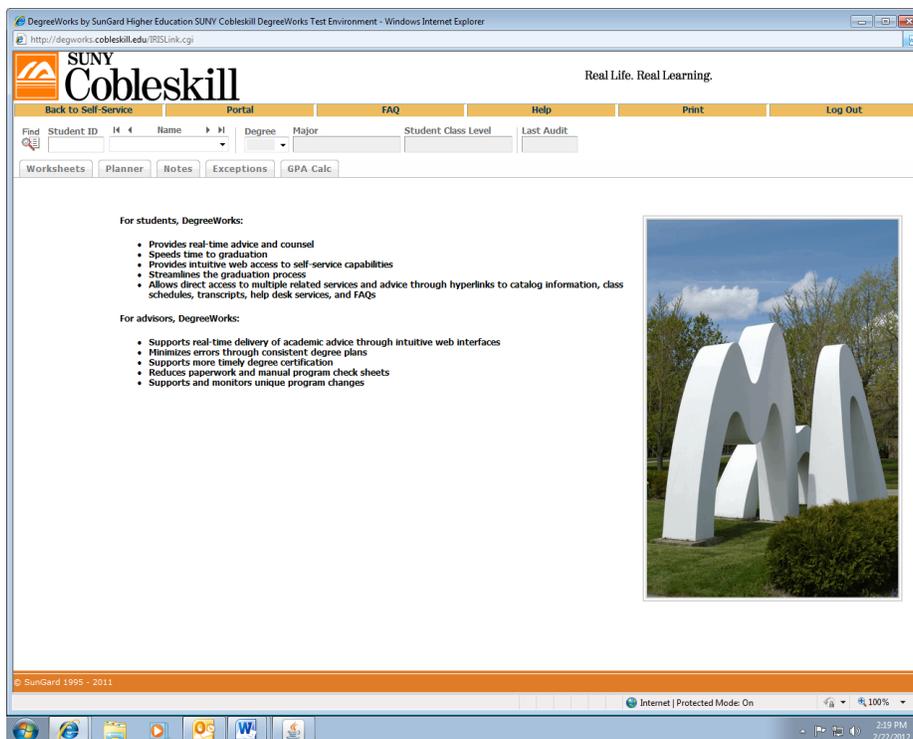
## Logging On

In order to gain access to DegreeWorks, you must log into BannerWeb go to <http://dwprod.cobleskill.edu> and enter your User ID # and Password. Your User ID and Password determine what permissions you have as a DegreeWorks user. DegreeWorks uses these values to determine which screens you have access to, which functions are available on these screens and what information is displayed.



The image shows a web browser window displaying the DegreeWorks login page. At the top left is the DegreeWorks logo with the text 'SUNGARD HIGHER EDUCATION'. The main heading is 'Secured Access Login'. Below this are two input fields: 'User ID' and 'Password'. At the bottom are two buttons: 'Log In' and 'Clear'.

Once you have been validated in the system, (for ADVX access) you will automatically be taken to the DegreeWorks Introduction page. This page contains brief information about the DegreeWorks functions available. ADV access will automatically be taken to their first advisee's degree evaluation page. The top of the page contains several buttons.



The screenshot shows the DegreeWorks Introduction page in a web browser. The browser title is 'DegreeWorks by SunGard Higher Education SUNY Cobleskill DegreeWorks Test Environment - Windows Internet Explorer'. The address bar shows 'http://degworks.cobleskill.edu/RSLink.cgi'. The page header features the SUNY Cobleskill logo and the tagline 'Real Life. Real Learning.'. Below the header is a navigation bar with buttons for 'Back to Self-Service', 'Portal', 'FAQ', 'Help', 'Print', and 'Log Out'. A search bar is located below the navigation bar, with fields for 'Student ID', 'Name', 'Degree', 'Major', 'Student Class Level', and 'Last Audit'. Below the search bar are buttons for 'Worksheets', 'Planner', 'Notes', 'Exceptions', and 'GPA Calc.'. The main content area contains two sections: 'For students, DegreeWorks:' and 'For advisors, DegreeWorks:'. Each section has a list of bullet points describing the system's benefits. To the right of the text is a photograph of a large white sculpture of the letters 'M' and 'A' in a park-like setting. The footer of the page shows 'SunGard 1995 - 2011' and the system status 'Internet | Protected Mode: On'. The Windows taskbar at the bottom shows the date '2/22/2012' and time '2:19 PM'.

## Search for Students (for ADVX access only)

All data fields along the top of the screen shot above are yellow except for the Name field and Student ID field. Yellow fields are non-selectable and cannot be used for search queries. White fields, such as the Student ID field shown above, are active fields. You can search for a student by typing in the student's ID into the Student ID field and pressing the Enter key or tab key. Different fields will appear white or yellow depending upon your user class. For students with multiple degrees, the Degree drop-down list box can be used to select the degree for audit processing.

The Name field contains a drop-down list box of students available to the user depending upon your user class. If this drop-down list box contains no values, click the Find button to select an individual or group of students. This will open up a new search window.

Once you have selected your population of students, click the OK button in the search window. This will close the search window and load the list of students into the drop-down list box in the Name field on the Introduction page. From this drop-down list box, you will now be able to select individual students for audit processing.

ID	Name	Degree	Major	Student Cl
<input checked="" type="checkbox"/>	[Redacted]	F	Business Administration BBA	Fourth Year
<input checked="" type="checkbox"/>	[Redacted]	F	Financial Services BBA	Third Year 2

Depending upon your user class, you will either be presented with a list of students assigned to you as advisees or you can select an individual student by entering the student's name or Student ID into the appropriate fields on the Introduction page and pressing Enter.

If you do not know the student's ID number or if you wish to select a group of students, click the Find button in the upper left-hand corner of the DegreeWorks screen. This will take you to the Find Students search page. This page (shown above) can be used to select an individual student using name, student ID or SSN, or a group of students defined by other selection criteria.

To select a single student, enter the student's ID number in the Student ID field or enter the student's name in the Name field. Wild cards (@) can be used as part of the search string in any of these fields. A

search for "WE@" in the Name field will produce a list of all students who contain "WE" as the first two characters of their first, last or middle name. To search for a group of students, use the other fields to build your search criteria. Students can be selected based upon their College, Level, Degree, Major or any combination of items shown on the search screen. Click the Search button to execute the search. All students who meet the search criteria will be displayed in the bottom window of the Find Students search window. Use the scroll bars to navigate in the bottom window. Only valid combinations of search criteria will produce search results.

Once you have created a list of students who meet your selection criteria, you can sort the list by clicking on any of the field headers in the Students Found window. The red arrow indicates the sort field being applied to the list of students found. The list of students is sorted by name in descending order as a default. To change the sort from descending to ascending order, click the Name field header again. You will see the red arrow to the right change from a down-arrow to an up-arrow indicating that the name field is being sorted in ascending order. Any changes made to the sort criteria are valid only for the list of students found in the preceding search. If you modify the search criteria and execute a new search, the results will be displayed with Name as the default sort field.

When you have successfully created your list of students using the Find function and entered the sort order, you can delete students from the list by un-checking the check box to the left of the student. Click OK to close the search window and load the list of students into DegreeWorks. The list of students will load with the same sort characteristics defined on the search page. You may then select any student from the list for degree audit processing.

## Tabs Overview

### *Student Context Area*

- Student ID
- Name: if you have multiple students selected, this is a dropdown list of all selected students
- Degree: if the student has multiple degrees, this is a dropdown list of all degrees for that student.
- Major
- Class Level for the chosen degree
- Last Audit: the date an audit was last processed for the chosen degree

The screenshot shows the SUNY Cobleskill student portal interface. At the top left is the SUNY Cobleskill logo with the tagline "Real Life. Real Learning." to its right. Below the logo is a navigation bar with tabs for "Back to Self-Service", "Portal", "FAQ", "Help", "Print", and "Log Out". The main content area features a search bar with the following fields: "Student ID" (with a magnifying glass icon), "Name" (with a dropdown arrow), "Degree" (with a dropdown arrow), "Major" (with a dropdown arrow), "Student Class Level" (with a dropdown arrow), and "Last Audit" (with a text input field). Below the search bar are several tabs: "Worksheets", "Planner", "Notes", "Exceptions", and "GPA Calc". Under the "Worksheets" tab, there is a "Format:" dropdown menu set to "Student View", and buttons for "View", "Save as PDF", and "Process New". To the right of these buttons are two checked checkboxes: "Include in-progress classes" and "Include preregistered classes", and a link for "Class History".

## Process Degree Audit

Degree audits are processed using the **Worksheets** tab. To access this screen, select the student you wish to process. This will automatically take you to the Worksheets screen and the most recent audit for this student will load automatically.

The student context information will be displayed in the fields at the top of the window once the student has been selected. To process a new audit for the student select the Process New button. To include **In-Progress classes** or to **include pre-registered classes**, place a check in the appropriate check box.

The Include in-progress classes and Include pre-registered classes check boxes are checked by default. Be sure to select the appropriate audit report format prior to clicking the Process New button.

**SUNY Cobleskill** Real Life. Real Learning.

Back to Self-Service Portal FAO Help Print Log Out

Find Student ID: [redacted] Name: [redacted] Degree: F Major: Business Administration B Student Class Level: Fourth Year 1st Sem Last Audit: 10/25/2011

Worksheets Planner Notes Exceptions GPA Calc

Worksheets > Format: Student View View Save as PDF Process New  Include in-progress classes  Include pre-registered classes Class History

What If **SUNY Cobleskill DegreeWorks Test Environment**

Look Ahead Student View AA005155 as of 10/25/2011 at 11:21 (Graduation check)

Student ID	[redacted]	Degree	Bachelor of Bus Administration
ID	[redacted]	School	Business & Computer Tech
Classification	Fourth Year 1st Sem	Major	Business Administration BBA
Advisor	Burton, Chester J	Advisement Track	3216
Overall GPA	3.17	Academic Standing	

Requirements 71%

Legend

- Complete
- Complete except for classes in-progress
- Not Complete
- Nearly complete - see advisor
- (T) Transfer Class
- @ Any course number
- : Range of classes
- \* Course requires prerequisite

■ Degree in Bachelor of Business Administration Catalog Year: 2010/2011 Credits Required: 122 Credits Applied: 98

Unmet conditions for this set of requirements: 122 credits are required. You currently have 98, you still need 24 more credits.

- You meet the minimum GPA requirement
- Major Requirements Still Needed: See Major in Technology Management section
- Concentration Requirements Still Needed: See Concentration in Technology Management section
- Liberal Arts and Sciences Still Needed: See Liberal Arts & Sciences Requirements (BBA) section
- General Electives
- General Education Distribution Still Needed: See General Education Distribution section
- Competencies Still Needed: See Competency Requirements section

■ Major in Technology Management 76 credits are required. You currently have 40, you still need 36 more credits.

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The nightly batch process checks for data changes for each student and runs a new audit for those students with changed data. The audit you see when the student is loaded will reflect their most recent academic data. However, you may wish to click Process New to run a new audit at any time to reflect changes to requirements or to configuration settings. We recommend you **always** Process New.

## Worksheet Reports

DegreeWorks offers a number of different types of audit reports. Each audit report displays specific information about students and their progress towards degree completion. In the Audit Format drop-down list box, there are three audit reports available.

Here is the Legend that appears at the top of every audit.

Legend			
<input checked="" type="checkbox"/> Complete	<input checked="" type="checkbox"/> Complete except for classes in-progress	(T) Transfer Class	: Range of classes
<input type="checkbox"/> Not Complete	<input checked="" type="checkbox"/> Nearly complete - see advisor	@ Any course number	* Course requires prerequisite

## Student View

An example of a Student View Worksheet is shown on previous page.

## Graduation Checklist

Here is an example of a Graduation Checklist Worksheet.

The screenshot displays the SUNY Cobleskill DegreeWorks Test Environment interface. At the top, the SUNY Cobleskill logo and the tagline "Real Life. Real Learning." are visible. Below the logo, there are navigation links: "Back to Self-Service", "Portal", "FAQ", "Help", "Print", and "Log Out".

The main content area shows a search bar with fields for "Student ID", "Name", "Degree", "Major", "Student Class Level", "Last Audit", and "Last Refresh". Below the search bar, there are tabs for "Worksheets", "Planner", "Notes", and "GPA Calc". The "Worksheets" tab is active, and the "Format" dropdown is set to "Graduation Checklist".

The "What If" section displays the "SUNY Cobleskill DegreeWorks Test Environment" title. Below this, a "Look Ahead" section shows a "Graduation Checklist" for student AA008438 as of 02/23/2012 at 11:02. The checklist includes the following information:

Student	[Redacted]	Degree	Bachelor of Bus Administration
ID	[Redacted]	School	Business & Computer Tech
Classification	Fourth Year 1st Sem	Major	Business Administration BBA
Advisor	Burton, Chester J	Advisement Track	3216
Overall GPA	3.17	Academic Standing	

Below the student information, there is a "Legend" section with the same legend as shown in the previous block. The main checklist items are:

- Degree in Bachelor of Business Administration (Catalog Year: 2010/2011, Credits Required: 122, Credits Applied: 120)
- You meet the minimum GPA requirement
- Major Requirements
- Liberal Arts and Sciences
- General Electives
- General Education Distribution
- Competencies

Blocks included in this block:

- Major in Technology Management
- Liberal Arts & Sciences Requirements (BBA)
- General Electives
- General Education Distribution
- Competency Requirements

Major in Technology Management:

<input checked="" type="checkbox"/> Financial Accounting	ACCT 101 (T)
<input type="checkbox"/> Managerial Accounting	
<input checked="" type="checkbox"/> Principles of Financial Management	ACCT 235 (IP)

The footer of the page shows "© SunGard 1995 - 2011" and the system tray with the date and time: "11:35 AM 3/2/2012".

## Registration Checklist

Here is an example of a Registration Checklist Worksheet.

The screenshot displays the SUNY Cobleskill DegreeWorks Test Environment interface. The page title is "SUNY Cobleskill" with the tagline "Real Life. Real Learning." The navigation bar includes links for "Back to Self-Service", "Portal", "FAQ", "Help", "Print", and "Log Out". The user is logged in as a student with the following details: Student ID (redacted), Name (redacted), Degree: Business Administration B, Major: Business Administration B, Student Class Level: Fourth Year 1st Sem, Last Audit: 02/23/2012, and Last Refresh: 10/11/2011 at 4:50 pm. The "Worksheets" section shows the "Registration Checklist" selected, with options to "View", "Save as PDF", and "Process New". The checklist is titled "SUNY Cobleskill DegreeWorks Test Environment" and lists the following requirements:

- Degree in Bachelor of Business Administration** (Catalog Year: 2010/2011)
  - Still Needed: See Major in Technology Management section
  - Still Needed: See Liberal Arts & Sciences Requirements (BBA) section
  - Still Needed: See Competency Requirements section
- Major in Technology Management** (Catalog Year: 2010/2011, Credits Required: 76, GPA: 3.58, Credits Applied: 65)
  - Still Needed: 1 Class in ACCT 103
  - Still Needed: 1 Class in BADM 145
  - Still Needed: Choose from 1 of the following:
    - ( 12 Credits in BADM 480 or 485 or CAHT 480 or 485 or CITA 480 or 485 or FSMA 480 or 485 ) or
    - ( 7 Credits in BADM 300:499 or CAHT 300:499 or CITA 300:499 or FSMA 300:499 )
- Liberal Arts & Sciences Requirements (BBA)**
  - Still Needed: 1 Class in ECON 124
  - 3 Credits in ANTH 3 or 4 or ARAB 3 or 4 or ARTS 3 or 4 or BIOL 3 or 4 or CHEM 3 or 4 or CHIN 3 or 4 or COHM 3 or 4 or ECON 3 or 4 or EMSC 3 or 4 or ENGL 3 or 4 or ESOL 3 or 4 or FREN 3 or 4 or GART 3 or 4 or GOVT 3 or 4 or HIST 3 or 4 or HUMS 3 or 4 or JAPN 3 or 4 or JOUR 3 or 4 or MATH 3 or 4 or MUSC 3 or 4 or NAMS 3 or 4 or PERS 3 or 4 or PHED 3 or 4 or PHIL 3 or 4 or PHYS 3 or 4 or PSCI 3 or 4 or PSYC 3 or 4 or SOSOC 3 or 4 or SPAN 3 or 4 or SUST 3 or 4
- General Electives** (3 credits in The Arts. Click here to see classes that meet this requirement. ) or ( 3 credits in Foreign Language. Click here to see classes that meet this requirement. ) or ( 3 credits in Humanities. Click here to see classes that meet this requirement. )
- General Education Distribution** (3 credits in The Arts. Click here to see classes that meet this requirement. ) or ( 3 credits in Foreign Language. Click here to see classes that meet this requirement. ) or ( 3 credits in Humanities. Click here to see classes that meet this requirement. )
- Competency Requirements** ( 1 Class in Mathematics. Click here to see classes that meet this requirement. )

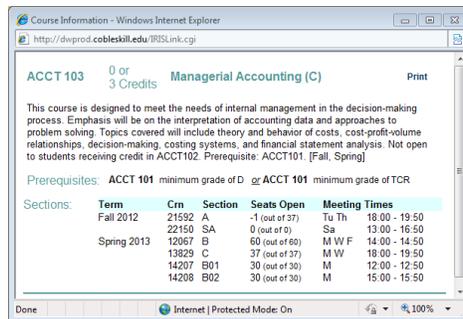
The footer of the page indicates "SunGard 1995 - 2011". The browser's taskbar shows the system time as 11:36 AM on 3/2/2012.

## CourseLink

DegreeWorks has the capability of allowing users to click on courses listed in the advice section to see a description of the course. The description may contain a listing of course content, prerequisites, instructors, course name changes, dual-listings, etc.

To bring up information about courses listed as Still Needed, click on one of the courses listed.

A text window will open up displaying information about the course selected. In this case, ACCT 103:

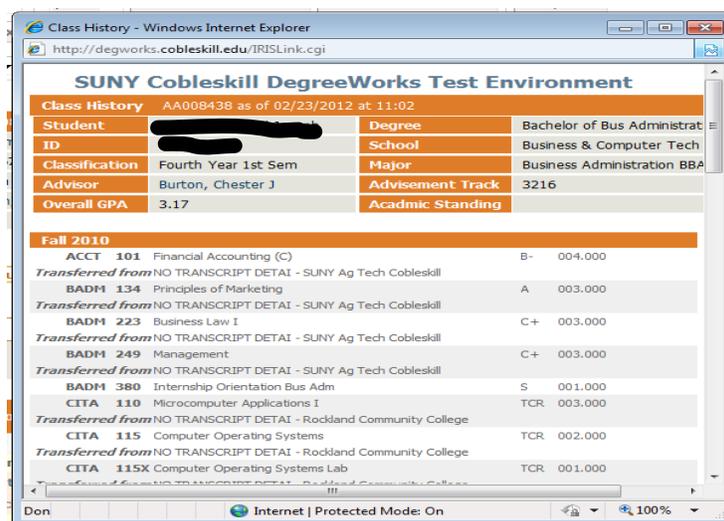


If the course key selected is non-specific (i.e. the course key contains a course range or wild card) or if the course has no listing in the course catalog, you will be taken to the top of the list returned. You can scroll through the list of courses using the scroll bars.

## Class History Link

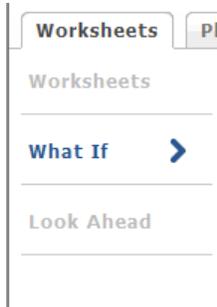


This link is found on the upper right of each Worksheet screen, and will display classes in the following format:



## Process What-If Audits

What-If audits allow you to process speculative degree audits for a student using their current class history. To access the What-If screen, click the What-If tab located on the Introduction page.



You can audit a student against the requirements for a different major, minor, degree, catalog year or any other selectable item on the What-If Audit screen. To generate a What-If degree audit, select the requirements you wish to audit the student against. The selected items will be moved to the window on the right.

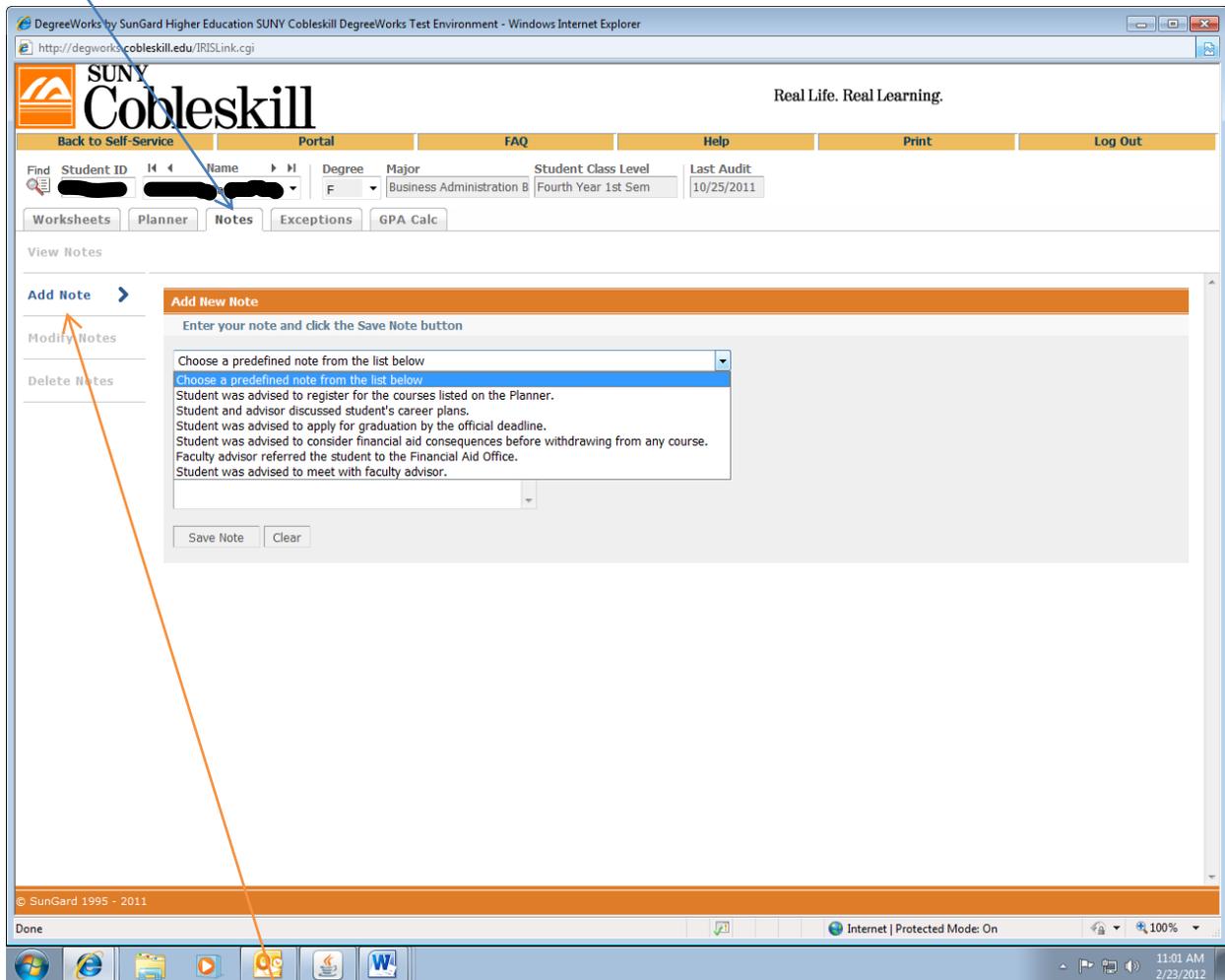
The screenshot shows the SUNY Cobleskill 'What-If' audit interface. At the top left is the SUNY Cobleskill logo with the tagline 'Real Life. Real Learning.' Below the logo is a navigation bar with links for 'Back to Self-Service', 'Portal', 'FAQ', 'Help', 'Print', and 'Log Out'. The main content area is divided into several sections. The top section contains search fields for 'Student ID', 'Name', 'Degree', 'Major', 'Student Class Level', and 'Last Audit'. Below this is a 'Worksheets' section with tabs for 'Planner', 'Notes', 'Exceptions', and 'GPA Calc'. The 'What-If' section is highlighted in orange and contains dropdown menus for 'Degree' (set to 'Bachelor of Bus Administration') and 'Catalog Year' (set to '2011/2012'). Below this is a 'Choose Your Different Areas of Study' section with dropdowns for 'Major' and 'Advisement Track', and a 'Chosen Areas of study' window showing 'MAJOR : Financial Services BBA'. The bottom section is 'Choose Your Future Classes', featuring input fields for 'Subject' and 'Number', an 'Add Course' button, and a 'Courses you are considering' window with a 'Remove Course' button.

To deselect an item from the window, highlight the item then click the Remove button located below the window.

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

## Notes

The Notes utility allows DegreeWorks users to document academic advising on student records. These Notes can be used for internal- use only or they can be made available to the student through DegreeWorks on the Web or via printed audit reports. Notes made available to the student appear in audit reports in a Notes section at the bottom of the report. To access the Notes screen, click on the **Notes tab**. This will bring up the following Notes screen with View Notes already selected as shown below.



Two functions are available. These are View Notes and Add Notes. While anyone with access to Notes can view a Note, only the Registrar Class user can modify or delete a Note. All Notes are stamped with the date and name of the person who created or modified the Note.

To add a note, click the **Add Note** button.

This will bring up the Add New Note text box shown below. Enter the text of the note you wish to add. For all audits run after this note is posted, the text of the note will appear at the bottom of the report (assuming the report type chosen displays Notes and the user has access to Notes).

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

View Notes

Add Note > **Your note was added successfully.**

Modify Notes **You may run a new audit to get your note changes incorporated into the latest audit for the student.**

Delete Notes **Run New Audit**

The creator of the note and the day the note was written appear to the right of the note. Audits will show as many notes as have been written.

Users who have been granted permission to do so can run a new audit after their note changes have been saved. In doing this, the note changes will **appear on the worksheet** the next time any user views the student's most recent audit.

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

View Notes

Add Note >

Modify Notes

Delete Notes

CITA 120X	Comp Concepts & Op Systems Lab	TCR	1	Fall 2010
Satisfied by: NO TRANSCRIPT DETAIL - Rockland Community College				
CITA 190X	Linux Operating System Lab	TCR	1	Fall 2010
Satisfied by: NO TRANSCRIPT DETAIL - Rockland Community College				
CITA 200X	Data Comm & Networking Lab	TCR	1	Fall 2010
Satisfied by: NO TRANSCRIPT DETAIL - Rockland Community College				
GEMA TFR	GEMA Category Satisfied	TCR	0	Fall 2010
Satisfied by: NO TRANSCRIPT DETAIL - SUNY Buffalo				
GESS TFR	GESS Category Satisfied	TCR	0	Fall 2010
Satisfied by: NO TRANSCRIPT DETAIL - SUNY Buffalo				
PHED 136	Beginning Tennis	TCR	1	Fall 2010
Satisfied by: NO TRANSCRIPT DETAIL - Rockland Community College				
XREG XREG	Cross Registered - Consortium	IP	12	Fall 2010
XREG XREG	Cross Registered - Consortium	IP	3	Spring 2011
XREG XREG	Cross Registered - Consortium	IP	3	Fall 2011
<b>In-progress</b>			<b>Credits Applied: 30</b>	<b>Classes Applied: 7</b>
ACCT 235	Prin of Financial Mgmt (C)	IP	3	Fall 2011
BADH 310	Human Resources Management	IP	3	Fall 2011
BADH 400	Operations Management	IP	3	Fall 2011
BADH 449	Management Policy & Issues	IP	3	Fall 2011
XREG XREG	Cross Registered - Consortium	IP	12	Fall 2010
XREG XREG	Cross Registered - Consortium	IP	3	Spring 2011
XREG XREG	Cross Registered - Consortium	IP	3	Fall 2011
<b>Notes</b>				
Student was advised to meet with faculty advisor.		Entered by Burton, Chester J	Date 02/23/2012	
<b>Disclaimer</b>				
You are encouraged to use this degree audit report as a guide when planning your progress toward completion of the above requirements. Your academic advisor or the Registrar's 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 note: It is the students responsibility to be familiar with and meet all degree requirements.				

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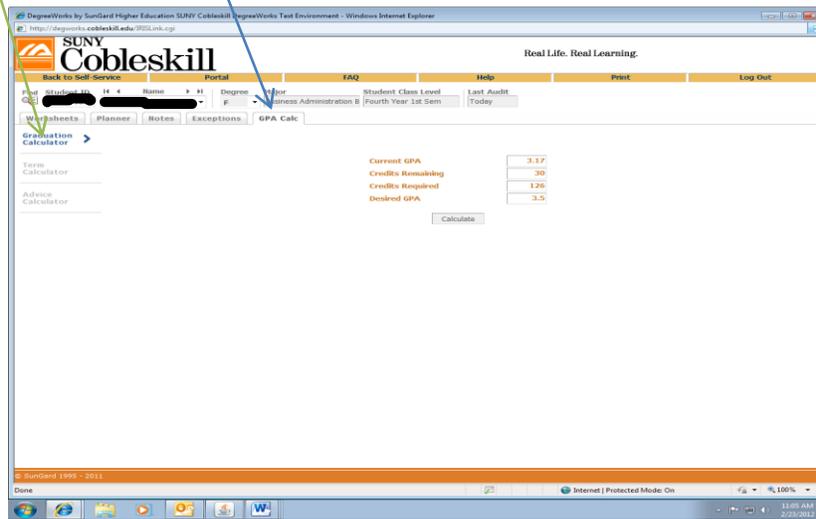
## GPA Calculations

### Graduation Calculator inputs

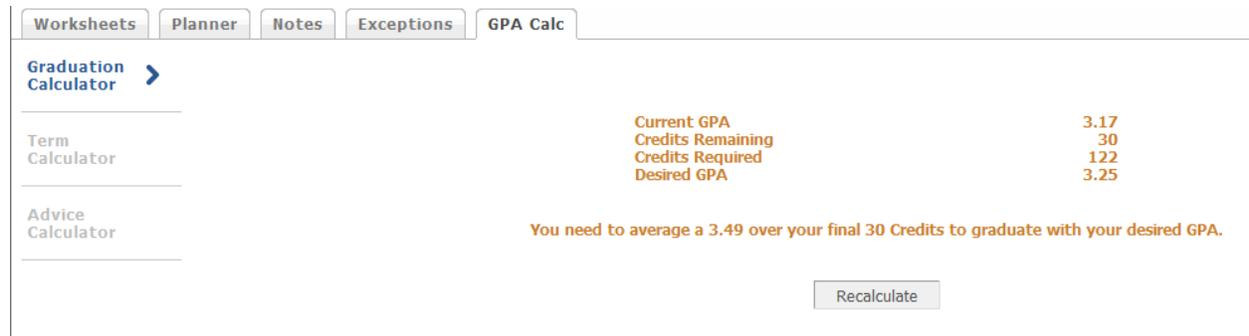
- Current GPA
- Credits Remaining
- Credits Required
- Desired GPA

This calculator takes the most "unknown" inputs. Many students may not know how many credits are required for their degree, nor the number of credits remaining. Its purpose, however, is to give the student a general view of what average GPA they will need to achieve over their final "X" credits in order to achieve their desired GPA. In some cases, this calculator will be useful to inform the student that their desired GPA is not possible to achieve (considering their number of credits remaining). In short, this calculator helps students to set long-term general goals.

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



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



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

### Advice Calculator inputs

- Current GPA
- Credits Earned
- Desired GPA

This calculator is perhaps the easiest to use. The student need only provide their desired GPA. It is used to figure out how a student can raise/lower their GPA using actual grades as advice. While it is fairly general, it is more specific than the graduation calculator.

The screenshot shows a navigation bar with tabs for Worksheets, Planner, Notes, Exceptions, and GPA Calc. Below the tabs are three calculator options: Graduation Calculator, Term Calculator, and Advice Calculator. The Advice Calculator is selected, indicated by a blue arrow. To the right of the Advice Calculator, the following information is displayed:

Current GPA	3.17
Credits Earned	32
Desired GPA	3.25

To achieve your desired GPA, you need one of the following:

- 3 Credits at 4.00 ( A ) grade average
- 6 Credits at 3.67 ( A- ) grade average
- 32 Credits at 3.33 ( B+ ) grade average

Note: Results that would require you to take more than 150 Credits have been omitted.

Recalculate

### Term Calculator inputs

- Current GPA
- Credits Earned
- Class information
- In-progress classes

When done entering class information with expected credits and grades, click calculate. The following screen will produce the new calculated GPA.

This is the most specific calculator. If you wish to change class or grade information, simply click Recalculate and the original screen will again be presented for you to make changes. When you click Calculate, the revised information will appear.

Enter data into the vacant fields as below and press Calculate. Note that the student's current classes and credits have been preloaded into the form.