UMdegree Training Manual
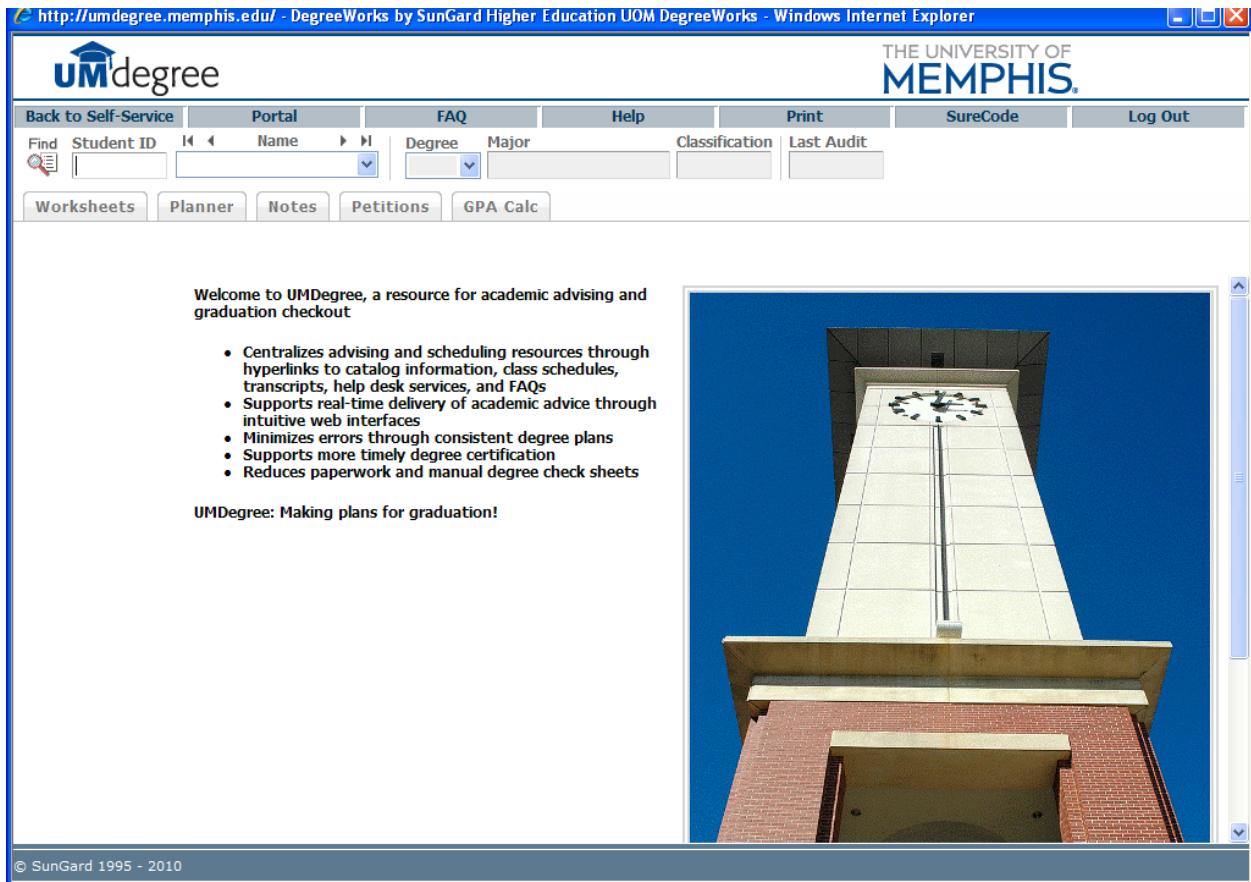

THE UNIVERSITY OF
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Dreamers. Thinkers. Doers.

Version 1.8.1 (Advisors) ADVX

Table of Contents

UMdegree

Background

Purpose of the course: Introduce academic advisors to UMdegree at The University of Memphis

Objectives: At the end of the training session, advisors should be able to:

1. find students using the UMdegree search methods

2. view and understand the components of a student UMdegree worksheet and its requirements

3. view and understand a UMdegree *"what if"* worksheet

4. be introduced to the UMdegree *Planner*

5. begin using UMdegree to submit requests for petitions

6. see and practice the functionality of notes in UMdegree

7. review GPA calculators delivered with UMdegree

UMdegree

Login

Step 1) Login in to myMemphis

Step 2) Click on Advisor (or Faculty) Tab

Step 3) Find the UMdegree channel

Step 4) Click on the UMdegree logo

Step 5) If you are not logged in by SSO, login using your myMemphis/email username and password

UMdegree

Navigational Tools

Welcome to UMdegree
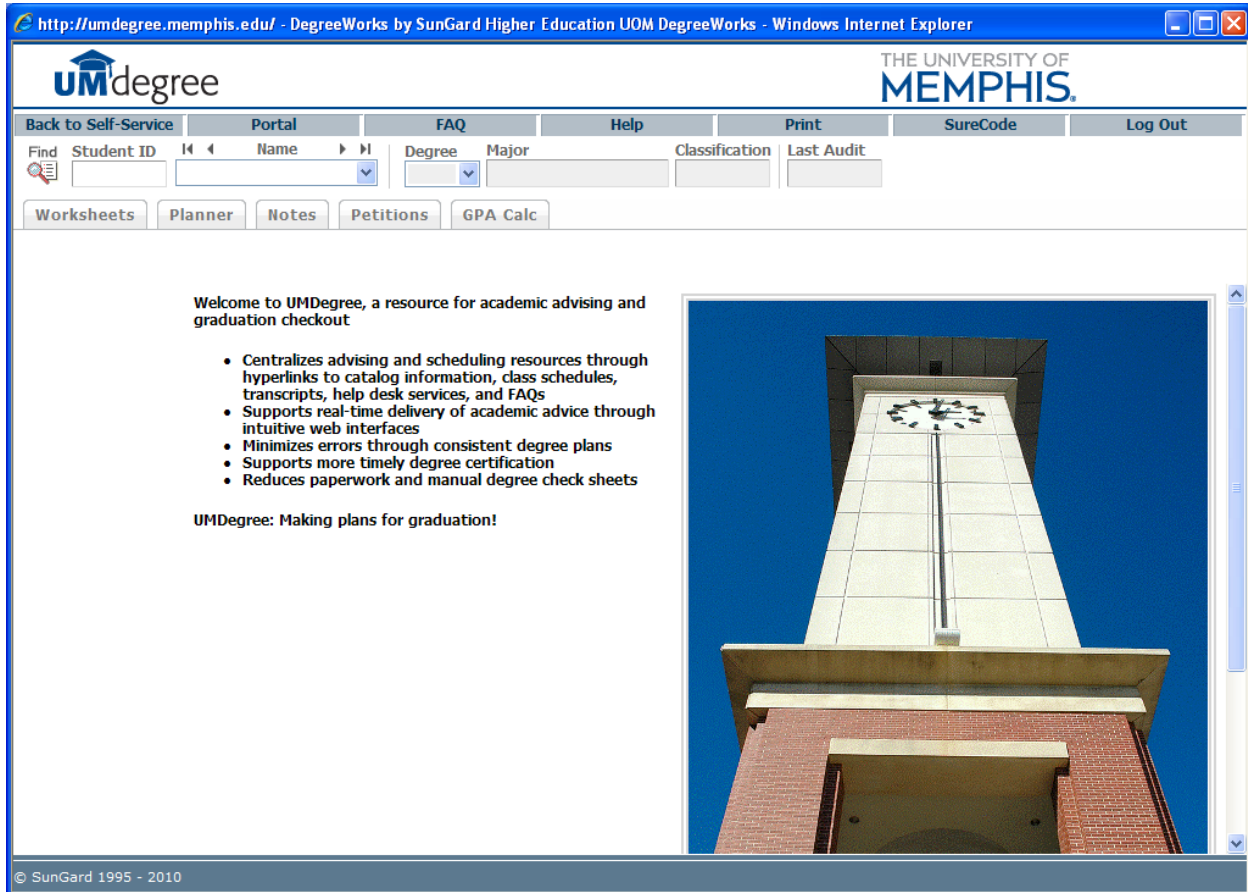
This is the first page you will see once you login to UMdegree. Below are some navigational tools to utilize while in UMdegree

 Frequently asked questions pertaining to UMdegree

 Help file for Find Students (written with the student in mind, but also helpful for the Advisor)

 Allows the user to print the current page

 Logs user out of UMdegree

Under those navigational tools lies the *Audit Bar*

				FAQ	Help	Print	Log Out
Student ID	Name	Degree	Major	Classification	Last Audit		

The Audit Bar allows you to search for students by name or UID.
Once student is located, it will also give general information of the student in the blocks adjacent to the student's name.

Audit Bar Terms

Allows for the location of students with the use of First & Last Name (see more in the section [The Find Tool)](#)

Student ID

The UID (must follow UXXXXXXXX format and cannot be the student social)

Name

Student's name cannot be entered here. This box will automatically populate once either the student ID is entered or the student is selected from the *Find Icon* option

Degree

Current student's degree will be displayed here. The drop down can be used to switch between primary and secondary degree

Major

Current student's major will be displayed here

UMdegree

How to Find Students

By student ID:
If you know the student's U number, you can enter it here and hit the enter key on your keyboard.

Student ID

As stated previously, it must be the UID (*NOT* the social security number) following the U######## format. Capitalization of the "U" will not affect search.

By student name:
If you do not know the students ID, the student can still be found using the Find Tool. Using the Find Tool will take you to a different menu on a different page.

The Find Tool
The Find Tool provides advisors with some additional ability to find individual students and groups of student based on search criteria. Each item has a pull down menu that lists the options for that item. Combine criteria to narrow your search.

Step 1) Click Find icon
Step 2) The Find Students box will appear

Step 3) Students can be searched by either the first or last name (see example)
Click the search bar to begin the search.

Step 4) In the lower box labeled Students Found, a list of students will appear with the checks in the boxes next to their names. Unselect the student that you are not interested in and hit *OK*.

Step 5) What should appear next is the Students *UMdegree Worksheet*

UMdegree Worksheet

The UMdegree Worksheet gives the most recent information regarding the student's academic affairs. The worksheet is divided into **blocks**. Each block has a title and a check box in the header and when all requirements in that block are met, the box is checked with a green check mark. The block headers have different information based on the block type. All the student worksheets begin with a student information section followed by a *Degree Progress* bar.

Student Information Section
Contains basic student information such as UID, the assigned advisor, major, minor, and concentration.

Progress Bar
Displays the percentage of the student's requirement progress

Degree Block
Contains all the requirements for the student's program. Individual requirements are hyperlinked to the section for that requirement/block until the requirement is complete.

Requirement Block may include Major Block
contains all the requirements for the student's declared major (s)
Will read undecided if a major has not been declared

General Education Block
Contains all the general education courses that the student has or has not completed for graduation

College Requirements Block
Requirements specifically for the student's BA, BS, or other requirements

Upper Division Block (for some degree programs)
Required Upper Division hours grouped together.

Other Blocks will display in certain degree program depending on the requirements for that program

Fallthrough courses Block
Contains courses completed but not currently being used to fulfill requirements. This is the place where you will find electives or courses that may need to be used as substitutions, but are not yet documented.

Insufficient Courses Block
Contains courses that carry unsuccessful grades (F, W, sometimes D) and first (second, third) attempts of repeated courses.

In-progress
Contains course that the student is currently taking or is registered for in a future term. See the term to differentiate.

Legend
Contains the symbols and definitions used for the UMdegree worksheet

✅ Complete	≈ Complete except for classes in-progress	(T) Transfer Class
☐ Not Complete	≈ Nearly complete - see advisor	@ Any course number

Disclaimer
Statement of the intended use of the UMdegree Worksheet. This will be edited to reflect changes in policy prior to "go live" for students (Fall 2011)

UMdegree

Look Ahead

Allows you to enter in future course and view a student worksheet with those courses applied. Look Ahead may also be used in a What If scenario (see What If Tab).

To see an audit SHOWING COURSES FOR WHICH the student PLANS TO REGISTER IN FUTURE TERMS, use the form to enter the Subject code and Number of each anticipated course.
Once you have created your list of courses, click on the Process New button.

Look ahead scenarios are not saved.

UMdegree

What if

The What if Tab allows you to create scenarios based upon what if you changed your major or degree path.
Step 1) Select a Degree
Step 2) Select an Academic Year (catalog)

Step 3) Select a Major (major choice is narrowed depending on choice of degree above)
Step 4) Select a College (this is required for the What If to process correctly)

Step 4) Other criteria such as Minor, Concentration can be added under the *Choose Your Different Areas of Study* section

Step 5) Future courses related to this new major can also be added to the scenario under *Choose Your Future Classes*

Step 6) Click *Process What-If button (at top)*

What you will see next is the *What If* scenario for that student. It will look just like that student's real worksheet except this worksheet is directed towards the new major requirements for that student. The What-If worksheet will not save in the History.

UMdegree

Back to Self-Service	Portal	FAQ	Help	Print	SureCode	Log Out

Find Student ID |◄ ◄ Name ► ►| Degree Major   Classification Last Audit
                                      Undecided   Freshman   02/03/2011

Worksheets	Planner	Notes	Exceptions	GPA Calc

Worksheets   Back   Selected What-If Items: ▼ Look Ahead Courses Used: ▼

What If ❯

Look Ahead

Degree Progress

Requirements	34%

Credits	15%

☐ Bachelor of Science in Chemistry		Academic Year: 2009-2010 Credits Required: 120
		GPA: 1.330 Credits Applied: 18

Unmet conditions for this set of requirements:	120 credits are required for your degree. You currently have 18, you still need a minimum of 102 more credits. Additional credits may be required to complete requirements.
	Minimum GPA unsatisfied
	30 credits are required for UofM residency. You currently have 18, you still need 12 more credits.

☐ General Education Requirements	Still Needed:	See **General Education** section
☐ Major Requirements	Still Needed:	**MAJOR block was not found but is required**

☐ General Education		Academic Year: 2009-2010
		GPA: 1.330

☐ English Composition	**ENGL 1010** English Composition	C	3	Fall 2009
	Still Needed: **3 Credits in ENGL 1020**			
☐ Oral Communication	Still Needed: **1 Class in COMM 2381**			

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Internet   100% ▼

UMdegree

Planner Tab

Shows a split screen of the student's worksheet (labeled Planner Worksheet) and an area (labeled Student Educational Planner) where courses the student needs to take in **the future** can be compiled to create a program/degree completion plan.

Using the UMdegree Planner with Students

Courses may be entered into the Student Educational Planner in a "drag and drop" fashion. Student/Advisor may also type courses into the planner. The required format is:

CoursePrefix space CourseNumber

Example
ENGL 1010

ENGL1010 will not work.

To plan a category (Humanities; Upper Division) rather than a specific course prefix and number (ENGL 1010) enter a hyphen and then a space(- space) before the name of the category.

Example

- humanities

When you save, UMdegree will automatically convert all alpha characters to Upper Case.

- HUMANITIES

You may plan for up to 12 semesters in a single plan. Notes may be entered as reminders/tasks in the Notes Boxes.

Saving the Plan

Enter a name (Description) for the plan before saving.
Select the appropriate catalog (Academic Year) for this student/plan.
Do not lock the plan before saving.
Check all terms in the plan (or use the Check All Terms button on the bottom of the Student Education Planner).
Make sure to save the plan by clicking the "save plan" button at the bottom of the Student Education Planner. Multiple plans are allowed, but must be named differently.
Multiple plans will appear in the Planner pull down menu at the top left of the page.

Locking the Plan

Only the advisor may lock (unlock) a plan.
Only one plan may be active.
If there are multiple plans, you will be asked to decide which one is active.
If you desire to lock a plan, you must first save the plan (don't forget to Check All Terms).
Then lock and save again.

What if Options in the Planner

- There is a *What If Option* that will allow you to perform the *What if* scenario creation under the planner section. The Worksheet generated with What If in the Planner tab will show planned courses (courses on the saved plan) in the what if scenario.

Click Show What If Options on the Worksheet side
Select the What if Program (see What if section for details)
Click Use What If Scenario
Click Process New on the Student Educational Planner side (bottom)
Click Hide What if Options

Courses from the Planner will show in the What if Scenario

Plans may also be printed by using the **print link** at the upper right of the planner block.

UMdegree Planner

Batch Templates Import Summer2013

Templates have been created from the four year plans in the Undergraduate Catalog. These plans will be imported into the student's UMdegree planner tab when the student attends New Student Orientation. The plan imported will match the student's Banner coding in SGASTDN. The advisor may make changes to the plan in several ways:

1. **Change the saved plan by deleting one plan and loading another**
2. **Load in a pre defined plan after deleting a saved plan**
3. **Save more than one plan**
   -If no saved plan already exists
   -If a saved plan is already in place

Change the saved plan by deleting one plan and loading another

There are instances in which the student is not interested in the major into which he/she was admitted by the time the student attends New Student Orientation. In this case, the advisor may make a change to the four year plan template by using the "Load in a Pre Defined Plan" function in UMdegree planner.

Step 1. Open UMdegree and navigate to the student by entering the U number and pressing enter on your keyboard.

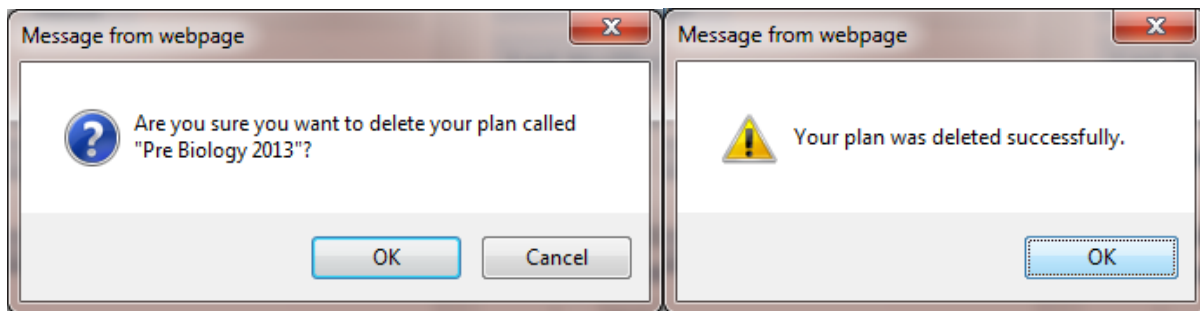Step 2. Click on the Planner tab.

Step 2. To remove a plan no longer needed, click "Delete Plan" on the lower right.

You will be asked to confirm and receive confirmation that you have deleted.

Load in a pre-defined plan after deleting a saved plan

Locate the "Load in a pre-defined plan" link in the heading section of the Student Educational Planner.

Notice that the plan is Active by default.

Step 1. Click on Load in a pre-defined plan.

Step 2. UMdegree selects a plan based on the student's Banner coding. If the student's declared major corresponds with the plan you would like to load, Click "Search," click on the name of the plan, and click "Load into my plan." Otherwise, Click "Clear all"

Step 3. Use the Major pull down menu to find the program you want.

> Hint: Pre-Biology is with Biology. Pre-Chemistry is with Chemistry. Otherwise, the major will be listed as you expect. Report variations of this truth to kthurmnd@memphis.edu.

Step 4. Chose the program you want from the search results and click "Load into my plan."

This plan is active, but must be SAVED.

Step 5. Save the plan by clicking Save Plan.

Save more than one plan

Some students will require more than one plan in the UMdegree planner tab for various reasons. In this case the Load in a Pre-defined Plan steps may be used to create multiple plans.

If no saved plan already exists:

Step 1. Click on Load in a pre-defined plan.

Step 2. UMdegree selects a plan based on the student's Banner coding. If the student's declared major corresponds with the plan you would like to load, Click "Search," click on the name of the plan, and click "Load into my plan." Otherwise, Click "Clear all"

Step 3. Use the Major pull down menu to find the program you want.

Hint: Pre Biology is with Biology. Pre-Chemistry is with Chemistry. Otherwise, the major will be listed as you expect. Report variations of this truth to kthurmnd@memphis.edu.

Step 4 Choose the program you want from the search results and click "Load into my plan."

Notice that the plan is Active by default.

This plan is active, but must be SAVED.

Step 5 Save the plan by clicking Save Plan.

Step 6. Continue with instructions for "If a saved plan is already in place."

If a saved plan is already in place:

Decide ahead of time which plan will be active. Only one plan can be active, but there may be more than one saved plan. When adding a second plan, follow the procedure for "Load in a pre-defined plan" making sure that the right plan is identified as active on the front end. The plan you identify as active will be the one that appears when the UMdegree Planner tab is opened. *If you attempt to create a second active plan, your first plan will disappear.*

Step 1. Pull down and click on "Add a new plan" and click Load.

Step 2. Click on "Load in a pre-defined plan."

Step 2. UMdegree selects a plan based on the student's banner coding. If the student's declared major corresponds with the plan you would like to load, Click "Search," click on the name of the plan, and click "Load into my plan." Otherwise, Click "Clear all"

Step 4. Use the "Major" pull down menu to find the program you want

Hint: Pre-Biology is with Biology. Pre-Chemistry is with Chemistry. Otherwise, the major will be listed as you expect. Report variations of this truth to kthurmnd@memphis.edu

Step 5 Chose the program you want from the search results and click "Load into my plan"

Notice that the plan is Active by default.

This plan can be active only if all other saved plans are inactive. In any event it must be SAVED.

Step 5 Save the plan by clicking Save Plan.

If you need additional assistance, please call Karen Thurmond at 901-678-2588 or contact by email at kthurmnd@memphis.edu

UMdegree

Petitions

The Petitions tab allows users to enter requests for exceptions. A petition can be a request to have a particular requirement modified or waived for a particular student. To create a petition, first select the student for whom you wish to enter a petition and then click the Petitions tab. This will bring up the petition screen shown below.

The petition screen shows all petitions that have been entered on the student's behalf. The View Petitions screen is shown by default whenever the petition tab is selected.

Petitions are grouped according to their status. Petitions can either be waiting for approval, approved, applied as exceptions or rejected. All new petitions have a default status of waiting for approval when first created. Once a petition is created, it can be acted upon by the appropriate approver.

To create a new petition, click the Add Petition button. This will bring up a text box where you can enter the text for the petition.

Please provide the following information with your petition:
1. Prefix, number, and name of course that would normally satisfy the requirement
2. Prefix, number, name, and (if transfer course) institution where taken of the course the substitution course
3. Requirement to which these courses are relevant in this student's program.

Remember that you cannot make a petition on behalf of a student until you have accessed the student in UMdegree. Think of the petition entry more like an email than a form to fill out. Sometimes more information will help the approver. Remember also that the petition may have to be reviewed by a series of approvers.

Once you have entered the text for the petition, click the Submit Petition button to save the petition to the database. A message will appear telling you your petition was added successfully.
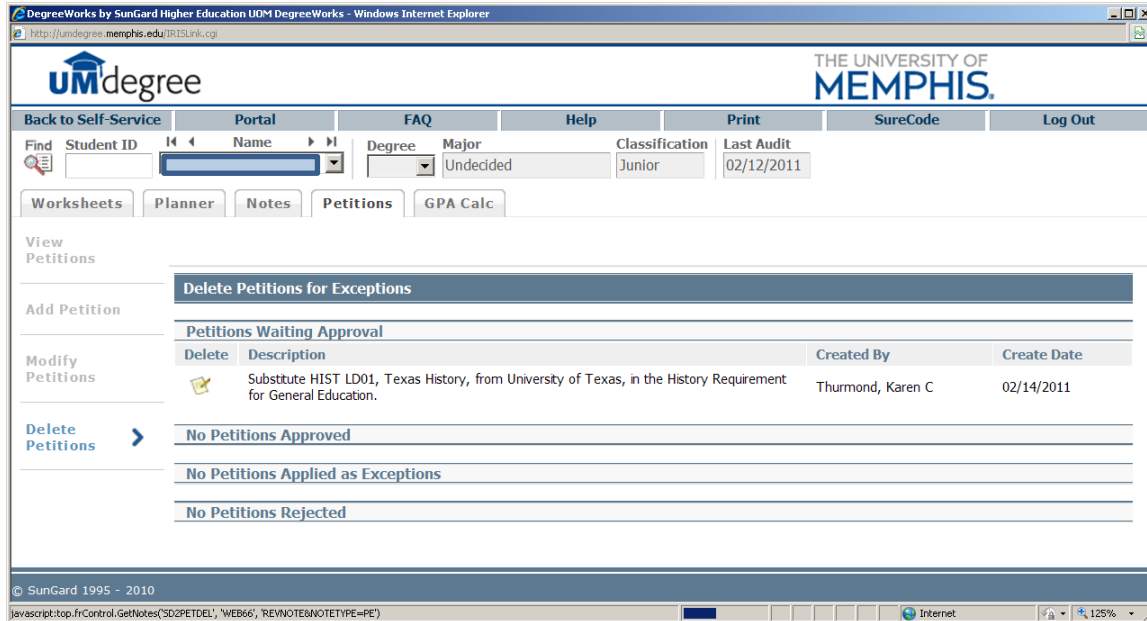
To add another petition, click the Add Petition button again and repeat the process.

To modify a petition, click the Modify Petition button. Only petitions with a status of Waiting Approval may be modified. A text window will open up for those petitions created by you. You will not be able to modify petitions created by others. To modify a petition, click in the text window and add or delete text. Click the Save button to the left of the petition to save your changes. When a new petition is saved it is routed to a queue for approval.
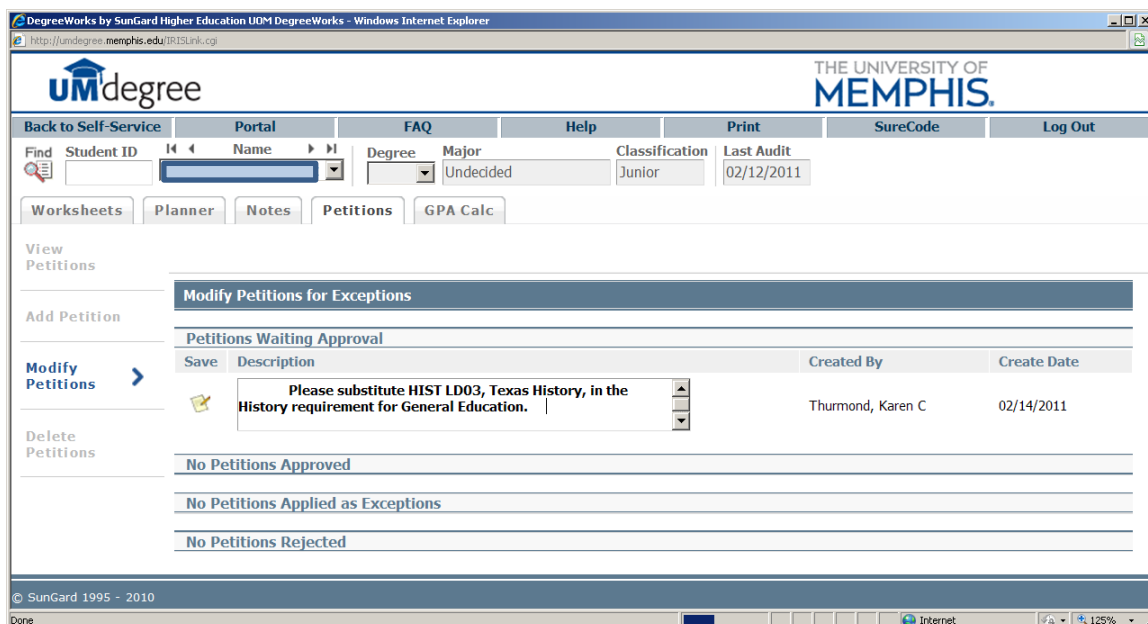
To delete a petition, click the Delete Petition button. Only petitions created by you can be deleted by you. Click the Delete ✏️ button to the left of the petition to remove it from the database. **Petitions that have been approved, applied as exceptions or rejected cannot be deleted.**

Petitions will be approved/applied in a random timeframe, but usually within 48 hours. Please make a record of the students for whom you make petitions so you can go back to the petitions tab or the student worksheet to view the decision. There is no system generated response to petitions.

UMdegree

Notes

The Notes tab allows UMdegree users to document academic advising on the UMdegree records. The notes can be used for internal use only or they can be made available to the student through UMdegree on the Web. **Notes made available to the student appear in worksheets in a Notes section at the bottom of the report.** To access the Notes screen, click on the Notes tab. The section opens to a view of the notes. You have the option of adding notes or viewing notes.

There are predefined notes available to capture the advising session. An option to make the comment NOT AVAILABLE to students exists.

In UMdegree, all notes are public by default. The option to make a note NOT AVAILABLE to the student is provided . Please use discretion when making notes. Notes are part of the student educational record.

Click on the Add a Note button. Use the pre-defined comment or add a comment or use a combination of both. Click Save Note.

Notes made available to the student appear at the bottom of the worksheet. Click process new to view these new notes.

You can modify or delete notes in a manner similar to the process for modifying and deleting petitions.

UMdegree

GPA Calculators

Graduation Calculator: The current GPA defaults. Enter the credits required and credits remaining. Click the **Calculate** button. The purpose of the Graduation Calculator 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 the desired GPA is not possible to achieve (considering the number of credits remaining).

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

Graduation Calculator ›

Term Calculator

Advice Calculator

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

In short, this calculator helps students to set long-term general goals.

http://umdegree.memphis.edu/ - DegreeWorks by SunGard Higher Education UOM DegreeWorks - Windows Internet Explorer

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| Back to Self-Service | Portal | FAQ | Help | Print | SureCode | Exception Management | Log Out |

| Find | Student ID | Name | Degree | Major | Classification | Last Audit | Last Refresh |
| Find | | | | Undecided | Freshman | 02/09/2011 | Today at 5:54 am |

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

Graduation Calculator ›

Term Calculator

Advice Calculator

Current GPA	3.47
Credits Remaining	90
Credits Required	120
Desired GPA	3.5

You need to average a 3.51 over your final 90 Credits to graduate with your desired GPA.

Recalculate

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Term Calculator:

Current GPA and credits completed to date default. The current classes will default. Enter the credits if necessary and enter the projected grades. (You can also add a course the student might be considering but for which they haven't yet registered.) Click the **Calculate** button. You can change the classes and the grades at any time and recalculate. The term calculator can be used for goal-setting as well as mapping paths to avoid probation, achieve honors, etc.

Advice Calculator

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

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