ADVISOR
(DEGREE AUDIT)
Faculty Manual
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A. **General information**

Advisor (Degree Audit) is a campus wide software system to help faculty, staff, and students track and plan academic progress in a student’s chosen program (certificate, diploma, degree, etc). The system allows registered students to see how their completed courses fit in their program, what requirements still need to be completed, and run “what if” scenarios to see their progress in a program if they changed their faculty, program(s), major(s), minor(s), etc.

B. **How to Login**

Advisor (Degree Audit) can be accessed on the Faculty and Staff page on the University of Regina (U of R) website. To access this page:

- Go to the bottom of the main U of R Homepage and click *For Faculty and Staff*
- Click on the link *Advisor (Degree Audit)* in the grey column on the right of the screen under Log-in Pages

- You will be redirected to the CAS login page if you are not already logged in.

- Fill in Username
Fill in Password
Click Login
Advisor (Degree Audit) application will open

*If you do not have access and should, please contact your Faculty Administrator to request access.

C. **Main Navigation Bar**

*Please note buttons and functions available will vary depending on the user’s role.

① **Main Navigation Bar**
This main navigation bar appears at the top of most pages in the Advisor system. It contains buttons and functions appropriate to the user’s role in the system.

② **Home Button**
From anywhere in the application where the navigation bar can be seen, the user can click this 'Home' button to return to the home page.

③ **Student Focus and Student Search**
A critical concept to understand in the Advisor system is that of 'student focus'. That term references the student the system is 'focused on'. Users can change that student at any time.

This drop-down contains a powerful student-search area. Using the fields provided in this drop-down, users can find student(s) that match all and only the criteria.

All of the search fields are 'contains' searches, so users can enter any parts of what they know into the fields, and then click the 'Search' button to update the results. You do **not** need to add a % for the contain search to work.

Only **active students** in the system will appear in the results.
④ Legacy UI *(Registrar’s Office users only)*
Clicking on this button allows users to jump back to the 'old UI,' where they can perform all the functions (including manager functions) available there.

Once users are in the old UI, they will find a comparable icon in the old-UI navigation bar, and that will take them back to this new-UI.

⑤ Notifications *(currently not available)*
The Advisor system contains a wide variety of proactive notifications, and users will receive the ones appropriate to their role in the system.

These notifications are triggered by such events as: Student completes (or fails to complete) a particular requirement, a Communicator message is sent, student's enrolled courses come apart from their planned courses, and many others.

As new notifications reach users, they'll see this icon flash, and the number of unread notifications will update. Clicking on this button opens the Notifications summary drop-down. In the Notifications summary drop-down, users can open the Notifications History window (where users can view/manage all their notifications), or users can view and acknowledge particular notifications in the drop-down itself.

⑥ Communicator *(currently not available)*
The Advisor system has a powerful and real-time 'chat' and communications-records-keeping system called 'Communicator'.

Depending upon roles and permissions, Communicator can enable students to see messages sent to them by advising staff, share their audits and communicate with advising staff, request advising sessions, and so forth.

Advising (and other) staff can communicate with students or just among themselves, and a very powerful user-visibility-permissions system ensures that communications can be viewed by only those user-roles specified by the author of any communication.

Communicator also features a robust 'filtering' system, so that users can specify exactly which communications they wish to see, even to the level of showing only a list of shared audits or showing communications only from a particular user-group.

⑦ Administration
The Administration window enables users to perform many 'back-end' functions, such as view underlying system data, create Ad-Hoc Reports and Charts, and various other 'management' functions.
The functionality available to users depends upon their role and the permissions that role entails.

Help Tour

Throughout the Advisor application, look for the symbol 🎨 or 🕵 Tour buttons. These enable users to launch context-sensitive 'tours' of particular aspects of the application. These buttons will be found sprinkled in various places throughout the application.

D. System Security

The Advisor system has a hierarchical security system. This means that you are able to see everything at your level of security or below, but not above. As an example, advisors can see all audits that a student runs, but a student cannot see anything an advisor does unless they decide to share it with the student.

E. User Roles

There are currently two security roles in Advisor for faculty and staff:

1. The 'Advisor' role is assigned to users who have authorization to make exceptions to a student audit.
2. The 'Staff' role is assigned to users who have authorization to review a student file without making exceptions.

These roles are assigned to users based on the level of security required, not by the title of their position.

Students are assigned either the UGSTUDENT role or the GRSTUDENT role depending on their level.

If a user with a Advisor or Staff role is also a student, they can switch between their student and staff/advisor role by:

- Clicking on their username in the top, right-hand corner of the screen.
- In the drop down menu that appears, click on the Change Role to option.
SECTION 2
MAIN NAVIGATION HOMEPAGE

The main navigation homepage is the first screen in the Advisor application. This is where users can search for students.

A. How to Select a Student

When the Advisor application is opened, users can access student accounts by selecting a student and running an audit.

To select a student:

- Click on the Select a student drop down box in the main navigation bar at the top of the page
- The user has the option to enter the Student ID number, First Name, or Last Name
- These fields can be partially filled out and will bring up all students with that information.
  Example: Fill in the first name as Jane and it will pull up all the students with variations of “Jane” in their name – Janelle, Janet, etc.
  - Select Search
  - Once the student is listed, click on the name
Once a student is selected, users can view the Academic Goals of the student. Some important features on this page include the following:

1. **Academic Goals**

   An Academic Goal is any pathway to graduation. It can be a major, minor, degree, or any other approved credential combination specified by the University of Regina Undergraduate and Graduate Calendars.

   Academic Goal(s) that appear with the flag beside them indicate the programs that students are officially registered in, in Banner. Students in concurrent programs will have both of their programs appear as individual Declared Goals.

   Other goal(s) are referred to as “what if” goals. These are hypothetical programs, to see how far along a student would be in completing the “what if” program without formally registering in it.

   Users can use the 'Add,' 'Edit,' and 'Delete' buttons to create, edit, and delete 'what if' goals but cannot change the declared goal in Advisor (Degree Audit), only in Banner.
Add Goal

Clicking this button opens the goal-editor, so that users can create a new 'what if' goal from scratch.

In the goal-editor, users can 'drill into' any major/minor/certification or other program, and combine majors and so on. Ultimately users will select some combination of programs that provide a graduation path, and then can save that new 'what if' goal.

Users can create ‘what if’ goals by completing the following:

- Click on Add
- Click on University of Regina
- Select either Undergraduate Programs or Graduate Programs
- Select the Catalog Term
- Select the Certificate, Diploma, or Degree
- Continue selecting options to build the intended ‘what if’ goal

*All sections of the tree will turn green when complete.

- Once all sections of the tree are complete, scroll to the top of the page
- You can add a name to the goal or leave this field blank which will auto-generate a name
- Click Save

This will add the ‘what if’ goal to the Academic Goals section. As mentioned above, this is helpful for students who are contemplating a change in program and/or Faculty.

Example of the tree:
③ Edit Goal
Clicking this button opens the goal-editor for the goal selected. Users can then add or remove program components from the selected goal, and rename that goal.

④ Delete Goal
Clicking this button enables users to delete the selected goal. Users will be prompted to confirm the desire to delete the goal as shown below.

⑤ Template Manager
This button toggles open or closed a list of your created templates as well as options to add/edit/delete templates.

⑥ Plan Manager
This button toggles open or closed a list of your created plans as well as options to add/edit/delete plans.

⑦ Audit History
This button toggles open or closed the Audit History pane. This pane allows users to view and manage recent and saved audits.

There is a 'filter' icon in the upper-right of this pane, which allows the user to narrow the displayed list according to various metrics.

The system automatically saves the ten most recent audits per-goal and per-user. These are replaced in rolling fashion as users run new audits against particular goals. However, each user can also have an unlimited number of named/saved audits; naming/saving is done via the 'Save' button at the top of each audit.
Create Audit

This button runs a new audit against the selected goal and according to the Audit Options Dropdown menu items that can be selected just to the right of the Create Audit button.

The selected goal must be 'complete' and 'valid,' and the audit-run attempt will produce an error message if it is not.

This is the most common error that will appear. This means that either the catalog term in the students declared goal is not yet set up or the student is completing a program at the U of R that does not lead to a credential. An example of this would be exchange or visiting students.

If the 'Declared' goal(s) is/are not valid and you believe there should be a template, please contact the Registrar's Office at Degree.Audit@uregina.ca.

Most audits run very quickly, and will display a spinning wheel to indicate it is processing.
When the audit is complete, the screen will change to display the completed audit. Users can then run a new 'Tour' from the audit page to get more information about how to interpret the audit.

Audit Options Dropdown Menu

This Dropdown Menu allows users to specify various audit-run metrics prior to running the desired audit including the sort of courses that may be applied to the requirements on the audit. To display the Dropdown Menu, click on the arrow located just to the right of the ‘Create Audit’ button.

Users will also be able to specify which of the academic plans they wish to use when running the audit. That plan will be the one from which planned courses are applied on the audit, and it is also the plan into which new planned/scheduled courses will be placed. The default plan is always the top plan in that list, so if users change nothing, the default plan will be the selected plan.

B. How to Logout

It is important that all users properly Logout of Advisor (Degree Audit) when finished. To do this:

- Click on username in the top right corner of the navigation bar
- Select Logout

*If the system remains idle for a period of time, the user will automatically be logged out.
*If users close their browsers, this will not log them out of the Advisor (Degree Audit) system.

SECTION 3
RUNNING AN AUDIT

A. How to Run an Audit

When the Advisor (Degree Audit) application is opened, users can access student accounts by selecting a student and running an audit.

To select a student:

- Click on the Select a student drop down box in the main navigation bar at the top of the page

- The user has the option to enter the Student ID number, First Name, or Last Name

*These fields can be partially filled out and will bring up all students with that information. Example: Fill in the first name as Jane and it will pull up all the students with variations of “Jane” in their name – Janelle, Janet, etc.

- Select Search
- Once the student is listed, click on the name
- Select an Academic Goal (this will usually be the ‘Declared’ goal, unless the user wishes to create/select a ‘what if’ goal as noted above)
- Click Create Audit
- Student’s audit will display

B. Main Navigation Bar

The main difference in the main navigation bar from the one on the prior page is the addition of the update student record button.
Update Student Record

A job runs nightly to update student record information to the *Advisor* (Degree Audit) System. This means that if a student registers for a course on Tuesday morning, Tuesday night the new information will be sent to *Advisor*. If you would like to see the updated information on that Tuesday afternoon prior to the nightly job running, you will need to update the student record individually by selecting the update student record button.

Clicking on this button initiates a 'pull' request to the system to update the degree-audit information for the current student focus.

Users may update the present student no more frequently than a configuration setting allows (default is no more frequently than once per minute).

C. Components of an Audit

1. The Student’s Audit

The student’s audit contains detailed information about his/her academic progress, and it enables users to customize how courses apply, plan/schedule the student’s upcoming
coursework, and even project when the student will graduate. This is important as each audit is a “snap shot” of their progress to completing their academic goal. This will continue to change as they progress through their program, so be sure to pay attention to the time and date. It says that “At this time on this day, they have completed this much of their program”.

Beneath that you will then see some alerts and notes, which will vary depending on several factors
- The most important note is the one in yellow, stating that the audit is not official until it has been reviewed and verified by faculty.

Beneath that you will then see some alerts and notes, which will vary depending on several factors
- The most important note is the one in yellow, stating that the audit is not official until it has been reviewed and verified by faculty.

- The following three notes appear on undergraduate audits for all faculties if a student meets the criteria for the note to appear.

  - You currently have a UGPA below 60%. Please see your advisor.
  - At least one in progress (NR) or registered for (RE) course has been applied to the program. Please note all courses must be completed with a successful grade in order to graduate from this program.
  - At least one failed grade has been applied to the program audit. This course must be repeated (or replaced, if applicable).

- Certain faculties also have additional notes that may appear on a student record.

  - Major and Minor averages must be, at minimum, 65% for graduation. This requirement is not met. Please see your advisor.

② Student Credential

This is the Root or Top 'Node' of the audit, which is the 'highest' requirement that must be satisfied in order for the student to complete the academic goal.

Each requirement bar on the audit can be clicked to open up a context-menu related to that requirement.
③ Satisfied/Unsatisfied

On each requirement of the audit, the user can see whether or not that requirement is satisfied.

If there is a solid check-mark at its left end, then that requirement is satisfied. (If the Top Node is satisfied, then the entire goal is complete.) Otherwise (typically denoted by a red X), the student will still need to satisfy one or more sub-requirements.

Sub-requirements are displayed in the same way. A check-mark denotes a satisfied requirement, and an X denotes an unsatisfied requirement.

④ The Courses Total

On each requirement of the audit, users may see the Courses totaling. All requirements of the audit are hierarchical so the totaling that is seen on each requirement includes all of the courses applied to all of the levels of that requirement.
⑤ The Credits Total

On each requirement of the audit, users may see the Credits totaling. All requirements of the audit are hierarchical so the totaling that is seen on each requirement includes all of the credits applied to all of the level of that requirement.

⑥ The GPA Total

On each requirement of the audit, users may see the GPA totaling. All requirements of the audit are hierarchical so the totaling that is seen on each requirement includes all of the GPA values applied to all of the levels of that requirement.

⑦ Collapse/Expand

On each requirement of the audit, users can collapse or expand that 'level' of the audit. Every requirement will show either an 'up pointer' or a 'down pointer.' The user can click/tap these icons to collapse/expand the 'node,' which will hide or show the details of that requirement.

D.  Audit Key (Legend)

Throughout an audit, users might encounter different colours and some additional superscripts or words that have been added to the system to highlight specific things about a course. There are also multiple alphabetical grades that may show up in place of a regular numerical grade. Please see key below:

<table>
<thead>
<tr>
<th>Symbol</th>
<th>Meaning</th>
</tr>
</thead>
<tbody>
<tr>
<td>✗</td>
<td>An unsatisfied item.</td>
</tr>
<tr>
<td>✔️</td>
<td>A satisfied item.</td>
</tr>
<tr>
<td>🔴</td>
<td>An optional unsatisfied item.</td>
</tr>
<tr>
<td>✔️</td>
<td>An optional satisfied item.</td>
</tr>
<tr>
<td>📌</td>
<td>An information item.</td>
</tr>
<tr>
<td>⭐</td>
<td>Courses or requirements with this symbol are not included in calculated course, credits, and/or GPA totals. Hover the mouse over the asterisk for more information.</td>
</tr>
<tr>
<td>🔍</td>
<td>A pinned course, meaning the course will not move unless manually moved by an advisor. Click a course to pin/unpin it from a requirement.</td>
</tr>
<tr>
<td>🔽</td>
<td>A button to collapse a requirement. Click to use.</td>
</tr>
<tr>
<td>🔽</td>
<td>A button to expand a requirement. Click to use.</td>
</tr>
<tr>
<td>⚓</td>
<td>The presence of this button indicates that a course can be moved to this section by an advisor. Click to use.</td>
</tr>
<tr>
<td>📆</td>
<td>The item is planned using the Planning Module, meaning the item has not been completed or registered in by the student on the official database system, Banner.</td>
</tr>
</tbody>
</table>
These buttons initiate tours of the system. You can tour the home page, audit(s), the Toolbar Area, and the Sidebar Area.

This button, called “The Cloud”, will do a Single Student Import, meaning it will contact our student records and update a specific record to have the most up to date information.

This is the notification button. Notifications in regards to your audits will appear at certain events, however, the University is not currently using the notification system.

The declared flag indicates the program a student is officially registered for in Banner.

The official flag indicates the audit has been verified by a faculty advisor to be correct.

The graduated flag indicates the audit has been verified for Graduation by a faculty advisor.

<table>
<thead>
<tr>
<th>Font Colours and Superscripts</th>
<th>Meaning</th>
</tr>
</thead>
</table>
| **Red Font**                 | - Items in this colour indicate that a requirement has not been met.  
                               | - Courses in this colour indicate that they are considered as an unsuccessful attempt and must be retaken or replaced with a different course. |
| **Orange Font**              | Items in this colour indicate that an advisor has made an exception. |
| **Blue Font**                | Courses in this colour indicate that the course is considered Transfer Credit, meaning the course was taken at another institution. |
| **Green Font**               | Courses in this colour indicate that the course has not yet been completed, but the student has registered for the course or has planned to take the course. |
| **Superscript T**            | Courses marked with the ‘T’ superscript indicate that the course is considered Transfer Credit, meaning the course was taken at another institution. Hover your mouse over the ‘T’ to see which institution the course was taken at. |
| **Superscript E**            | Courses marked with the ‘E’ superscript indicate that the course is considered to be equivalent to a course that is required in the requirement. Hover your mouse over the ‘E’ to see which course is the equivalent. |
| **Superscript R**            | - Courses marked with the ‘R’ superscript indicate that the course is being reused somewhere else in the audit.  
                               | - Generally, courses marked with the ‘R’ will only be counted in the courses, credits, and GPA totals once.  
                               | - These courses will appear twice or more on the audit, but only in one of these instances will the superscript indicator appear. |
| (repeat)                     | Courses that appear with this notation after the course title indicate that the course has either been repeated, is a repeat of a course, or is in the process of being repeated. |

<table>
<thead>
<tr>
<th>Alphabetic Grade</th>
<th>Meaning</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>AG</strong></td>
<td>Aegrotat Standing</td>
</tr>
<tr>
<td><strong>AU</strong></td>
<td>Audit (no credit)</td>
</tr>
<tr>
<td><strong>AW</strong></td>
<td>Audit Withdrawal</td>
</tr>
<tr>
<td><strong>C</strong></td>
<td>Credit for Hours Showed</td>
</tr>
</tbody>
</table>
### CW | Compulsory Withdrawal  
DE | Deferred Examination  
F | Failure  
IN | Incomplete  
IP | In Progress  
MC | Maintenance Candidacy  
N | No Credit for Hours Shown  
NP | Not Passed  
NR | Not Yet Reported  
P | Pass Standing  
RE | Registered For  
T | Transfer (it will show as a T followed by a numerical grade as in the first example below)  
W | Withdrew from Course  
XF | Academic Misconduct

**Examples:**  
- **ECON 100 - Intro. to Economic Issues**  
  - S/16  
  - 3  
  - T77  
- **PSYC 101 - Introductory Psychology**  
  - W/18  
  - 3  
  - IP  
- **MATH 103 - Applied Calculus I (repeat)**  
  - W/17  
  - 0/3*  
  - 40  

⚠️ **Exception:** This requirement has been force satisfied.  
- **ANTH 100 - Introduction to Anthropology**  
  - F/16  
  - 3  
  - 72  
- **ENGL 100 - Critical Reading and Writing**  
  - F/16  
  - 3  
  - 70

---

### E. The Audit Toolbar

![Audit Toolbar Image]

1. **Audit Toolbar**  
The audit toolbar is the grey area at the top of the audit that contains all the detailed information about the student and his/her Academic Goal. This ‘header’ area contains the following information: Student Name, Audit Name, Audit Date, Academic Goal, Term, Degree, Major, Program, UGPA (this is the undergraduate UGPA and graduate CGPA), Faculty, and Campus.
② Share the Audit *(currently not available)*

If users click this button, they will take a 'snapshot' of the current audit and share it with the faculty/staff that have the rights to view the student’s academic records.

This shared audit will then appear in the Communicator Window associated with the student’s records, so that faculty/staff can communicate with the student, and vice versa, regarding the shared audit.

Sharing audits enables everybody to be 'on the same page,' literally, about the student’s academic progress and his/her upcoming academic plans.

③ Rerun the Audit

If users click this button, they will immediately rerun the audit. This refreshes all of the data used to compose it, including display of any new exceptions/waivers that might have been applied, as well as other underlying data that might have changed since the user started viewing this audit.

The audit literally reruns, which means that course 'mappings' on the audit may change, so that courses (perhaps) get 'shuffled around' to new locations to most benefit the student’s progress. The audit engine always tries to achieve 'maximum satisfaction,' all things considered, so that the student enjoys maximum applicability of his/her courses. So, as the underlying data changes, the audit engine can often find a better distribution of the student’s courses.

④ Save the Audit to PDF

If users click this button, the system will generate a PDF view of the audit and allow users to view or download it.

The PDF view will reflect the current 'state' of the audit, including which sections users have expanded/contracted, any exceptions/waivers, moved courses, and so on.

The PDF includes an index of the 'nodes' of the audit, those 'headings' for each requirement, so that users can easily jump from place to place within the PDF.

To save the audit as a PDF:
   1. Click on the PDF button

![PDF button]
2. The system will create the PDF for you:

   [Image: PDF is processing]

3. Click on the checkmark when the “PDF is complete.”

   [Image: PDF is complete]

4. In the menu that appears, click on “PDF: PDF Audit”:

   [Image: PDF Audit]

5. Save the PDF file where desired on your computer.

6 Audit Flags

   Advisors have the ability to assign flags to an audit. By default audits have no flag and are therefore, considered unofficial. Otherwise, the audits can be flagged with any of the following:
   - Official
     - Audits flagged with “Official” have been reviewed by an advisor where everything was verified as correct.

   - Graduated
     - Audits flagged with “Graduated” have been reviewed by an advisor where everything has been verified as meeting the requirements for graduation of the program(s).
⑥ Manage Exceptions

If users have the necessary permission, they can click this button to see the list of exceptions/waivers that have been applied to this student/goal.

From that list of exceptions, the user can click on each one to see its details, delete particular exceptions, and edit the description text of particular exceptions. Be aware that deletions/edits are 'global,' immediately affecting all users that have rights to see the audits produced against this student/goal.

⑦ Display Details (header)

This button is a toggle that turns on/off the display of the 'header' area containing the student details and audit information. Click to display and click again to hide the details.

This 'header' area is always displayed in the PDF files created on any particular audit. The 'Details' will replace the Legend, if users have it displayed. Only the 'Details' or the Legend can appear at any one moment in time.

⑧ Display Legend

This button is a toggle that turns on/off the display of the Legend, which provides a quick, visual representation of the various icons on the audit and what they mean.

The Legend is a quick-reference, so that at a glance users can remind themselves of what a particular icon signifies.

The Legend will replace the 'Details' area. Only the 'Details' or the Legend can appear at any one moment in time.

⑨ Tour of the Audit

Clicking this button will begin a help-tour of the Audit, the Toolbar Area or the Sidebar Area. These tours introduce and explain the various elements and functions of each of the selected area.

⑩ Display Options (filter)

Clicking this button opens a drop-down menu of various display options for the audit. At present, the only options are 'Collapse Satisfied' and 'Expand All.' Conclusive Systems will be adding per-school options and other additional options over time.

**Collapse Satisfied** – If users select this option, all of the completed/satisfied requirements on the audit will 'roll up' into just the requirement 'node' that represents them. This view of the audit saves space and emphasizes just those requirements that still need to be completed/satisfied.
Expand All – If users select this option, they ensure that all of the ‘nodes’ on the audit become fully expanded, showing all courses and details. This is the alternative view to 'Collapse Satisfied,' because it ensures that everything on the audit is visible.

F. The Audit Sidebar

Audit Sidebar

If the sidebar area is present (the window-width allows it), then it contains a Table of Contents for the Audit, as well as a progress bar.

Users can click on each part of the hierarchical Table of Contents, and they will immediately jump to that location in the audit. Also, this Table of Contents clearly shows users the hierarchical relationships between the various requirements the student must satisfy in order to complete his/her academic goal.

If the progress bar is shown, users should be aware that it cannot be perfectly accurate. It employs a complex method for comparing the student’s satisfied requirements, courses, and credits, but it is only accurate to within a few percentage points. So, do not 'rely on it' other than as a general indicator of the student’s overall goal progress.
SECTION 4 EXCEPTIONS

A. Adding an Exception

① Select the section of the audit (grey box) where the exception needs to be added.
*For this example, MATH 217 is going to be allowed to satisfy a CS or MATH 261 course for the Major requirement.

② Select “Exception” from the pop up box at the bottom of the screen.
③ Choose exception type from the drop down box.
*For this example, *Force Map* will be selected.

CS or MATH 261

**Example** – GEOG 100 is going to be allowed to satisfy one of the 200-level GEOG Courses for the Major requirement.

- **Choose Student Course** – MATH 217 – Differential Equations I
  *All courses that a student has completed will be listed alphabetically.

- **Ignore Obstacles** - ✅
  *This option forces the course into the requested mapping without regard for any of the restrictions that would ordinarily apply.

*See part C for more information on Exception Types.*
27

- **Split Credits** – leave blank
- **Specify a Target Course (Optional)** – leave blank
  - *This option forces the course to be considered an instance of a specific course from the list. This is useful when the user is mapping to a list of required courses. If the user does not specify a target course, the course will be mapped and the credits will apply but all of the courses in the list will still have to be taken.*
- **Comment** – Testing the Waiver (Force Map) exception
  - *It is always good to leave comments. Please be aware, students and University Faculty/Staff can read these comments.
- **Click Create/Request Force Map (Waiver) Exception** at the bottom of page.

5 The audit will refresh to include this exception.

**In this example, section 1.1.4 CS or MATH 261 is now satisfied and the exception is noted in orange.**

The user can click on the exception (in orange) in the section to view the details (created by, on, and comment). This information is also accessible in the exception management area at the top of the page (more information below).

**Tip: To ensure a course remains in the section, users can ‘pin’ the course as per the following:**

- Click on the hyphen (⁻⁻⁻) beside the course
- Hyphen should change to Pin (.pin)

*Pinning a course to a specific location will ensure the system will not remove this course from the section if the user makes an exception to map another course to that section.*
Another Example:

*How the audit ran. The courses below mapped to the section automatically.*

<table>
<thead>
<tr>
<th>Course</th>
<th>Grade</th>
<th>Credits</th>
</tr>
</thead>
<tbody>
<tr>
<td>BUS 400 - Business Strategy</td>
<td>F/08</td>
<td>3</td>
</tr>
<tr>
<td>BUS 415 - International Marketing</td>
<td>W/06</td>
<td>3</td>
</tr>
<tr>
<td>CS 100 - Introduction to Computers</td>
<td>W/05</td>
<td>3</td>
</tr>
</tbody>
</table>

*If users want to add an exception to a section to map in another course, a course (lowest grade) will be bumped out. The example below shows that BUS 361 with 82% was forced in and CS 100 with 82% was bumped out.*

<table>
<thead>
<tr>
<th>Course</th>
<th>Grade</th>
<th>Credits</th>
</tr>
</thead>
<tbody>
<tr>
<td>BUS 361 - Management of Performance R</td>
<td>W/09</td>
<td>3</td>
</tr>
<tr>
<td>BUS 400 - Business Strategy</td>
<td>F/08</td>
<td>3</td>
</tr>
<tr>
<td>BUS 415 - International Marketing</td>
<td>W/06</td>
<td>3</td>
</tr>
</tbody>
</table>

*If users need CS 100 (with 82%) to remain in the audit (without the course being bumped out) they can ‘pin’ the course in the section. In the example below, since CS 100 (with 82%) was pinned), BUS 400 was bumped out since the grade was the next lowest at 84%.*

<table>
<thead>
<tr>
<th>Course</th>
<th>Grade</th>
<th>Credits</th>
</tr>
</thead>
<tbody>
<tr>
<td>BUS 361 - Management of Performance R</td>
<td>W/09</td>
<td>3</td>
</tr>
<tr>
<td>BUS 415 - International Marketing</td>
<td>W/06</td>
<td>3</td>
</tr>
<tr>
<td>CS 100 - Introduction to Computers</td>
<td>W/05</td>
<td>3</td>
</tr>
</tbody>
</table>
B. Manage Exceptions

① Click on the “Exceptions” button in the grey box at the top of the audit. All exceptions for the student will appear.

② To delete or edit the comment for the exception, do the following:
   - Click on the exception (exception will highlight in darker grey)
   - Make changes to the Comment section and save
   OR
   - Select Delete to delete the exception from the audit

**Please remember that exceptions that are saved on student audits will remain there until the user deletes them or another user decides to alter the exception (by creating another exception to re-map the course out of the section, etc.).
## C. Exception Types

<table>
<thead>
<tr>
<th>Type of Exception</th>
<th>Explanation</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Force Map – Map a course into this course list</td>
<td>This exception forces a specific course to be mapped to the target course list. This feature allows users to do two things: (1) Force map a course to be used in a section of the audit - even when it is not allowable (due to grade, etc.). (2) Allow users to substitute one course for another.</td>
</tr>
<tr>
<td>2. Force Unmap – Prevent a course from mapping</td>
<td>This exception ensures that a specific course will NOT be mapped at or beneath the target requirement. For example, a transfer credit can be removed from a section if users would prefer to use a different U of R course.</td>
</tr>
<tr>
<td>3. Force Satisfy – Satisfy a requirement or parameter</td>
<td>This exception forces a specific requirement or parameter to be considered satisfied, even when this would not normally be the case. *Users must be careful when using this option to Force Satisfy a course requirement as it will also satisfy the credit hours needed.</td>
</tr>
<tr>
<td>4. Allow Reuse – Allow courses to be reused</td>
<td>This exception allows a student to reuse a course or courses elsewhere.</td>
</tr>
<tr>
<td>5. Edit – Modify a requirement, parameter, or course option</td>
<td>This exception allows users to edit the numeric aspects of a requirement or parameter, or to remove it altogether. *How the parameters are set up can be complicated. Contact <a href="mailto:Degree.Audit@uregina.ca">Degree.Audit@uregina.ca</a> if you require assistance making this exception.</td>
</tr>
<tr>
<td>6. Remove – Remove a requirement, parameter, or course option</td>
<td>This exception allows users to edit the numeric aspects of a requirement or parameter, or to remove it altogether. * How the parameters are set up can be complicated. Contact <a href="mailto:Degree.Audit@uregina.ca">Degree.Audit@uregina.ca</a> if you require assistance making this exception.</td>
</tr>
<tr>
<td>7. Note – Show a message on the audit</td>
<td>This exception creates a note for all users to see.</td>
</tr>
</tbody>
</table>
D. Exception Examples

1. Force Map
Example: MATH 217 will be forced into an ‘ACSC or MATH 216’ requirement.

1. Select the requirement

2. Select Force Map
3. Select MATH 217
4. Select Ignore Obstacles

ACSC or MATH 216

Map a specific course into this course list: “ACSC or MATH 216”.

Choose Student Course

MATH 217 - Differential Equations I (2018, Fall, 3 credits, 82)

Ignore Obstacles: This option forces the course into the requested mapping without regard for any of the restrictions that would ordinarily apply, such as minimum grade requirements or restrictions against transfer courses. Course Status and Grade mappability are still observed.

Split Credits (Optional)
This option allows you to apply less than the total number of course credits to the target course list. The leftover credits will be free to apply elsewhere.

Specify a Target Course (Optional)
This option forces the course to be considered an instance of a specific course from the list. This is useful when you are mapping to a list of required courses, if you don’t specify a target course, the course will be mapped and the credits will apply but all of the courses in the list will still have to be taken.

Create Force Map Exception
5. **Click Create Force Map Exception**

Now that MATH 217 has been mapped in the ACSC or MATH 216 requirement, it is satisfied.

![Course Mapping Example](image)

2. **Force Unmap**

For this example, CS 110 will be unmapped from the Semester 2 (Winter) requirement.

1. **Select a requirement**

![Course Selection](image)

2. **Select Force Unmap from the dropdown menu**

3. **Choose a course to unmap from the selected requirement. Leave a comment if necessary.**

![Unmapped Course Example](image)
4. Click Create Unmap Exception

CS 110 will no longer be seen in Semester 2 and there is now a message saying that an exception has been made.

3. Force Satisfy

For this example, the Semester 4 requirement will be forced to be satisfy although none of the parameters are complete.

1. Select Semester 4

2. Select Force Satisfy

3. Choose to satisfy ‘This Requirement’
4. **Click Create Force Satisfy Exception**

There is now a green checkmark for the Semester 4 requirement and a message showing that an exception has been made.

4. **Allow Reuse**

   For this example, STAT 160 will become reusable in other requirements.

1. **Select a requirement**

   - STAT 160 - Introductory Statistics
   - W/19 3 NR
2. Select Allow Reuse
3. Select to reuse ‘A Student Course’
4. Select STAT 160 from the dropdown menu

5. Click Create Allow Reuse Exception

STAT 160 will now appear in any other requirement which it can fit in. It will appear with a superscript R which shows that it is being reused.
5. **Edit**

For this example, the overall requirement ‘Bachelor of Science’ will have a parameter edited so that it will be considered complete.

1. **Select the requirement**

2. **Select Edit**

3. **Choose to edit A Parameter of this Requirement**

4. **Open the dropdown and select ‘Students must complete 136 credit hours...’**

5. **Select the amount of credits you would like to be required**

6. **Click Create Edit Exception**
Both parameters of Bachelor of Applied Science are complete because the student has more than 40 credits.

6. Remove

For this example, the course requirement from Semester 5 will be removed from the audit.

1. Select the requirement

2. Select Remove
3. Select This Requirement

4. Click Create Remove Exception

The selected requirement no longer exists on the audit (unless if you delete the exception).
7. **Note**

1. **Select a requirement**

![Image of a course selection interface]

- CS 115 - Object-Oriented Design
- ENEL 280 - Electrical Circuits
- ENEV 223 - Engg Environment and Society
- ENGG 240 - Engg Science I - Mechanics
- MATH 217 - Differential Equations I

You must complete all courses here.

2. **Select Note from the exception dropdown**

3. **Type in a comment/note**

**ENEV 223, CS 115, ENEL 280, MATH 217, & ENGG 240**

![Image of a comment input field]

Create a note for all users to see.

**Comment**

![Image of a comment input field]

**test**

4. **Click Create Note Exception**

The note will now appear as an exception message on the selected requirement.
SECTION 5
TEMPLATE MANAGER/PLAN MANAGER

A. Template Manager

This button toggles open or closed the Template Manager pane. This pane allows the user to view, rename, delete, and assign plan templates.

A plan template is a slate of courses that have been planned into specific terms and years, and then that plan has been converted to a 'template' in the Plan Manager pane.

Once a plan is converted to a template, it can be assigned to individual students or many students in a batch, and that plan will become such students' default plan. The years in these new plans are populated correctly from a 'starting year' that the user specifies upon assignment.

B. Plan Manager

This button toggles open or closed the Plan Manager pane. This pane allows the user to view, rename, delete, and clone academic plans.

Only one plan can be the 'default plan,' and it is this plan that is used by the Planning/Scheduling module on the audit to associate courses with years and terms.

Students and advisors can interact here, as a student requests plan-approval, and the advisor either approves or rejects that plan. Once a plan is in a requested, approved, or rejected state, it cannot be further edited in any way or deleted. However, it can be cloned, and the student can then continue planning activities against the newly cloned plan, typically also making it the new default plan.

There are tools built into Advisor (Degree Audit) that students can use to plan their next semester or even their entire program.

To plan a course:
1. Create an audit, if you have not already done so, by clicking the Create Audit button.
2. Navigate to an unsatisfied requirement.
3. Click on the requirement title bar.

   ![Requirement Title Bar]

4. In the pop-up window, make sure the Plan tab is selected.

   ![Plan Tab]

5. Click on +Add Year

6. Enter the year you wish to plan to take courses. For example, if you wish to plan to take a course in 2019, enter 2019.

   ![Add Year]

7. Click Save.

8. The three semesters for year you entered will appear:
9. On the right side of the pop-up planning box, find the course you wish to plan and click on it so it is highlighted:

NOTE: Only courses that can satisfy this requirement will appear in the list. Additionally, students are responsible for ensuring they have the prerequisites for every course. More information for courses can be found in UR Self-Service.

10. Click on the Plan Here button (Plan Here) beside the semester you wish to plan the course:
   a. Winter
   b. Spring & Summer
   c. Fall
11. Click on Plan as Unscheduled.

![Plan as Unscheduled](image)

*NOTE: The planning module in Advisor (Degree Audit) is in no way connected with scheduling or registering for classes. It is a planning tool only. Please refer to UR Self Service to see when classes are offered and to register for classes.*

12. The class will now appear as a part of the student’s plan, which you can view by clicking the View Plan button.

13. The class will also appear in the audit as a planned course.

![Indigenous Knowledge](image)

*Advisor (Degree Audit) also allows you to have multiple plans. Each student is assigned a “Default Plan”, but you can create as many plans as you would like to help you plan out your academic career.*

To create a new plan:

1. On the home screen, click on Plan Manager.

2. Click on the Add Plan button.
3. A “New Plan” will appear in the list of plans available.

4. Use the Edit buttons to name your new plan and give your plan a description. *This is optional, but it is recommended that you name and describe the plan in a way that is meaningful to you.*

5. To plan courses in your new plan, click the down arrow beside the Create Audit button.

6. In the menu, use the Academic Plan drop down menu to select your new plan.

7. Click the Create Audit button.

8. In the audit, plan as many courses as you would like using the instructions on how to plan a course.
For each plan in the plan manager you have the following options:

- To view a plan.
  - Use the View button to view the courses planned in a plan.

- To edit the name of each plan.
  - Use the Edit button to edit the name.

- To edit the description of each plan.
  - Use the Edit button to edit the description.

- To set any plan as the default. The plan set as the default will be used automatically, meaning you will not have to use the drop down menu beside the create audit button to select the academic plan.
  - To set a plan as default, click the Functions button and select Make Default in the menu that appears.

- To clone a plan.
  - To clone a plan, click the Functions button and select Clone.

- To delete a plan.
  - To delete a plan, click the Functions button and select Delete.
How to Use the GPA Calculator

The GPA Calculator can assist students in planning to achieve a certain GPA. There are two sides of the GPA Calculation coin. First, you can specify a target GPA, and the system will tell you how many courses/credits of each possible grade it would take for a student to achieve that target GPA.

Second, you can specify how many courses of particular credits a student intends to take and achieve a certain grade, and the system will tell you what GPA they would end up with if they achieved those grades in those courses.

You can use the GPA Calculator to plan a GPA goal within a certain requirement or you can use the GPA Calculator to plan a GPA goal for the entire program.

To use the GPA Calculator:
1. Create an audit, if you have not already done so, by clicking the Create Audit button.
2. Navigate to an unsatisfied requirement.
3. Click on the requirement title bar where you wish to use the GPA Calculator, either a requirement where they still need to take courses or the top most requirement bar.
4. In the pop-up window, make sure the GPA Calculator tab is selected.

Bachelor of Arts

Plan GPA Calculator

Desired GPA (for: Bachelor of Arts)  Expected Grades (fr)

5. Click on the Desired GPA tab if you want to know how many courses/credits of each possible grade it would take for them to achieve a desired GPA.

- How to use the Desired GPA tab:
  - The Current Credits field displays how many credits are already applying to the requirement you clicked on. You do not need to change this amount.
  - The Current GPA field displays the GPA of the requirement you clicked on. You do not need to change this amount.
  - The Additional Credits field displays the maximum additional credits you may apply to this requirement. You typically only need to change this if they have limited credits left to take for the requirement.
  - The Course Credits field displays how many credits there are per course. Typically, U of R courses are 3 credits per course, so you will want to enter 3 here.
  - The Desired GPA field displays your desired GPA. This needs to be higher than the Current GPA.

Example: Student has completed 90 credits with a current GPA of 86.54% and they wish to know how they could achieve a GPA of 88%.

| Current Credits: | 90 |
| Current GPA:     | 86.54 |
| Additional Credits: | 30 |
| Course Credits:  | 3 |
| Desired GPA:     | 88 |

- Current credits is set to 90 because that is how many credits they have completed for the program.
- Current GPA is set to their current GPA of 86.54%.
- Additional Credits is set to 30 because that is how many credits are left for them to complete the program.
- Course Credits is set to 3 because that is how many credits are earned per course at U of R.
- Desired GPA is set to 88% because that is the GPA the student wishes to achieve.

The GPA Calculator then states the following:
- Four courses between 99-100% are needed to get a GPA of 88%.
- Five courses between 9-98% are needed to get a GPA of 88%.
- Six courses at 96% are needed to get a GPA of 88%.
- Seven courses at 95% are needed to get a GPA of 88%.
Eight courses at 94% are needed to get a GPA of 88%.

6. Click on the Expected Grades tab if you want to know what their GPA would be if you know how many courses of particular credits they intend to take and achieve a certain grade.
   - How to use the Expected Grades tab:
     - In the Courses field enter 1 for 1 course.
     - In the Credits field enter 3, or the number of credits they will receive for the course they are taking.
     - In the Grade field enter the grade they are anticipating on getting.

For example: A student with a current GPA of 86.54% with 90 credit hours earned towards their program, anticipates that they are going to get 87% in one of the courses they are currently taking and they want to see how that grade will affect their GPA.

The GPA Calculator states that if the student earns 87% in one course of 3 credit hours, their new GPA will be 86.55%.

You can add as many courses to the calculator as you would like. For example, the above student anticipates getting 87% in one course, 80% in another course, and 90% in another course.
Or, if the above student anticipates getting 87% in all three of their course, they can enter the information into the GPA calculator as need below:
SECTION 7
COURSE HISTORY

What is the Course History
The course history provides a list of all the courses a student has taken at the University, along with the Transfer Credit they have been awarded and any courses they are currently registered in for future semesters.

To see their course history:

1. Once you have a student selected, you can select ‘Course History’ on the main navigation bar.

![University of Regina](image)

2. You can sort courses by:
   - Clicking on the header of each column to sort the list of courses.
   
   OR
   
   - Use the filters to sort through the list of courses.
     1. For example, to search for all courses of a specific subject:
        - In the Field drop down menu, select Prefix.
        - Leave the logic operator as =
        - In the criteria field, enter in the subject code you are looking for, such as ENGL

<table>
<thead>
<tr>
<th>Prefix</th>
<th>2nd</th>
<th>3rd</th>
<th>4th</th>
<th>Title</th>
<th>Grade</th>
<th>Status</th>
<th>Credits</th>
<th>Year</th>
<th>Term</th>
</tr>
</thead>
<tbody>
<tr>
<td>ENGL</td>
<td>100</td>
<td></td>
<td></td>
<td>Critical Reading and Writing</td>
<td>78</td>
<td>Complete</td>
<td>3</td>
<td>2008</td>
<td>Fall</td>
</tr>
<tr>
<td>ENGL</td>
<td>110</td>
<td></td>
<td></td>
<td>Critical Reading &amp; Writing II</td>
<td>80</td>
<td>Complete</td>
<td>3</td>
<td>2009</td>
<td>Winter</td>
</tr>
<tr>
<td>ENGL</td>
<td>3010</td>
<td></td>
<td></td>
<td>George R.R. Martin</td>
<td>64</td>
<td>Complete</td>
<td>3</td>
<td>2012</td>
<td>Fall</td>
</tr>
<tr>
<td>ENGL</td>
<td>211</td>
<td></td>
<td></td>
<td>Literature Survey I</td>
<td>81</td>
<td>Complete</td>
<td>3</td>
<td>2016</td>
<td>Fall</td>
</tr>
<tr>
<td>ENGL</td>
<td>212</td>
<td></td>
<td></td>
<td>Literature Survey II</td>
<td>82</td>
<td>Complete</td>
<td>3</td>
<td>2017</td>
<td>Fall</td>
</tr>
</tbody>
</table>
- You can add multiple types of search criteria, such as looking for 100 level ENGL courses.

<table>
<thead>
<tr>
<th>Operator</th>
<th>Function</th>
</tr>
</thead>
<tbody>
<tr>
<td>=</td>
<td>Equal to</td>
</tr>
<tr>
<td>!=</td>
<td>Not equal to</td>
</tr>
<tr>
<td>&lt;</td>
<td>Less than</td>
</tr>
<tr>
<td>&gt;</td>
<td>Greater than</td>
</tr>
<tr>
<td>&lt;=</td>
<td>Less than or equal to</td>
</tr>
<tr>
<td>&gt;=</td>
<td>Greater than or equal to</td>
</tr>
<tr>
<td>Like (%)</td>
<td>Enter a fraction of a subject code followed by the % symbol, only subjects containing what has been entered will be shown. For example, entering 1% will show only 100 level courses.</td>
</tr>
<tr>
<td>Not Like (%)</td>
<td>Similar to the Like function however only subjects that do not contain the entered subject code will be shown.</td>
</tr>
<tr>
<td>In List</td>
<td>Create a list of values, separated by commas, and all subjects containing a value from that list will be shown.</td>
</tr>
</tbody>
</table>
SECTION 8
DEBUG COURSES

How to Debug Courses:
There may be times where Advisor (Degree Audit) will place a course in a certain requirement for a reason that is not obvious to a user. The ‘Debug Courses’ feature helps understand why Advisor (Degree Audit) sorts courses the way it does. All you need to do is select a sub-requirement and type in the course information for a course that you are curious as to why it has or has not been placed in that sub-requirement.

For example, we are going to look at a “Natural Science Elective” sub-requirement and use ‘Debug Courses’ to find out why CHEM 140 is not included.

1. Navigate to the proper requirement.

2. Click on the grey bar.
3. Click on ‘Debug Courses’.
4. Enter “CHEM” into the ‘Prefix’ area and 140 into the ‘Number’ area.
5. Click ‘Debug’.
CHEM 140 was not included because this requirement only calls for 2 courses and Advisor (Degree Audit) automatically chooses the courses that fit the criteria with the highest GPA.
SECTION 9
MOVING COURSES

Whenever there is a requirement which can be satisfied by multiple courses that the student has completed, an anchor icon will appear at the bottom right of the requirement area. This icon is the 'Move Courses' button. Using this feature, an advisor can move a course to a different valid sub-requirement.

How to move a course

1. Click on the anchor ( ) to trigger a pop up menu:

2. Click on the ‘Choose course’ dropdown menu.
3. Select a course.
4. Click ‘Move Course’.

After moving a course, a red X symbol will appear to the right of the newly moved course. Clicking on this symbol will remove the course and replace it with the course that was originally in its place.