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Systems Design: Acadmeic Advising System Implementation, A Case Study of User Centered System Design at the University of Central Florida

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SYSTEMS DESIGN: ACADEMIC ADVISING SYSTEM IMPLEMENTATION,

A CASE STUDY OF USER CENTERED SYSTEM DESIGN

AT THE UNIVERSITY OF CENTRAL FLORIDA

by

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ABSTRACT

This dissertation presents a case study in user-centered design completed at the University of Central Florida. Leadership in the College of Graduate Studies at UCF realized the need for an advisement tool to assist advisors in the academic colleges to track the success of their students.

After an advisement product was selected, the user-centered design approach started to be implemented. End-users were shown the basic functionality and known benefits of the product. Then they were asked how they could make it standardized across programs. The users selected the order in which information and degree requirements should display. The users asked for additional information to be shown on the new advising report called the Graduate Plan of Study (GPS). This information would assist them in advising students and certifying that the students' had met requirements to earn their degree.

With the help of the end-users, a prototype was developed and delivered to computer services.   End users assisted with the testing of current and additional functionality. After attending focus groups, the end-users had a better understanding of the need for testing. They assisted in providing ideas for training and a deployment plan to the university.   The use of the user-centered design approach helped to keep our end-users engaged in the project. They were the central cause of the successful implementation of a new advisement module for graduate students at UCF.

ACKNOWLEDGMENTS

TABLE OF CONTENTS

LIST OF FIGURES

LIST OF TABLES

DEFINITIONS

Advisement Report- A plan of study for students to follow to complete their degree (GPS)

Catalog year- Each student enters the university and the degree program under a specific catalog year that outlines the students' curriculum and non-curriculum requirements to complete the degree. Different catalog years could specify different requirements if there have been approved curriculum or policy changes.

eForm- The electronic form that is used when academic program staff need to communicate exceptions to a student's degree program to the College of Graduate Studies for processing

Exceptions-These are course waivers, course substitutions and requirement waivers that are used to alter a student's plan of study

GPS-Graduate Plan of Study

Requirements-These are course and non-course items that students need to complete to earn their degree. These are built in the back-end of the system and edited as the curriculum for a program changes or added when a new program is approved.

User-Centered Design- A process in which the end users of any new product or service provide input at each stage of the development and implementation.

Usability-The ease with which novice and experienced users can navigate a system without assistance

CHAPTER 1: INTRODUCTION

About the Author

Tracy Jones has been employed by the University of Central Florida (UCF) for eighteen years. Her diverse experience includes roles as an Admissions Counselor, Coordinator of Student Records, Assistant Director of Admissions, Records and Recruiting, Executive Director of Admissions, Records, Recruiting, Graduation, and International Services Center and most recently as the Assistant Dean of Operations in the College of Graduate Studies.

During her tenure with UCF, Tracy has led numerous technical projects working with the university's Computer Services and Telecommunications Office (CS&T) to clearly identify and document software specifications, oversee development timelines, supervise developers and consultants, create and use test scenarios, implement products, and roll out new technologies through various communications and training strategies. Tracy then evaluates the systems she has implemented, and others systems upon request, to make improvements for functionality and efficiency.

Tracy and her teams have won the Davis Award for Productivity and the Council of Graduate Schools award for Innovations in Business Processes. Some notable examples of projects led include the initial implementation of a new Student Information System, the implementation of a Graduate Intranet for graduate programs to use to gather reports on their programs and their students and the implementation of a two-way interface system that allows graduate programs to see all of their applications by term in one location. Using the two-way interface system, the program directors then are able to make admission decisions that are communicated to both the College of Graduate Studies and to the Student Information System.

Tracy has led a team to create an in-house, online application for graduate admission that services about 10,000 applications per year. She implemented a way for students to enter their professional development accomplishments to assist faculty with their annual reviews. Tracy also created an entire business process for other offices using new technology and image systems to better organize and serve their students.

Problem of Practice

Many universities strive to grow and increase their headcount and credit hours. For some, this is a strategy to receive money from their state. University staff members who have a background in enrollment management understand what comes along with enrollment growth. Where will the new students live, where will they park, where will they eat, who will teach the extra students, who will process the new applications and register the new students? Who will advise them so they can successfully complete their degree, particularly while treading water in the middle of more students?

The University of Central Florida's College of Graduate Studies has systematically tried to improve business processes in order to maintain or improve the level of service to a growing number of students with the same number of staff members. For example, in the year 2000 the academic college staff and the staff in the College of Graduate Studies graduated 5,284 students. Then in the year 2013, the academic college staff and the graduation staff in the College of Graduate Studies graduated 8,526 students with no additional human resources to assist in the processing of the graduation applications.

 In January of 2000, the College of Graduate Studies conducted a retention study. The study focused on the number of students that completed and those that did not complete their doctoral degree program. Through a survey tool and follow-up focus groups with students in

each doctoral program, one of the major conclusions was for those students that did not complete their degree program or those that considered leaving their degree program was the need for more and improved advising. The Dean for the College of Graduate Studies decided based on the results of the survey and focus groups, that we needed a better advising tool for students, faculty, and staff. By providing this tool, the College of Graduate Studies hoped that the university might see an increase in retention. After some discussion, our objective became to develop a user-friendly advising system for the eleven key graduate advisors in each of the University's academic colleges.

These users and an additional four users in the College of Graduate Studies were responsible for advising over 8,000 graduate students and certified about 3000 students for graduation annually. In the year 2009, we were guaranteed funding and human resources to implement a new advising system. In 2010, we began our research phase to examine what advising tools were available. We talked with other large universities to see what they used to advise and graduate their students. We searched graduate listservs and spoke with colleagues at conferences.   We wanted to find a system where the users "could operate the system without instructions. We needed an advising design that "would fit the need of the people that would use it," (Norman, 1988, p. xiii).   The previous advising tool only kept track of course-based requirements and it was not useful for graduate students that often must complete non-course based requirements for degree completion. We wanted the new system to allow for easy tracking and displaying of non-course requirements. An easy to use and efficient advising tool would improve the time it takes to advise students and would enhance the process for certifying students for graduation. In addition, it would make it easier for staff, faculty, and students to

understand what course and non-course requirements a student needs and show how close a student is to graduating. It would also allow for more individualized and targeted advising

Some of the employees in the University's academic colleges were not proficient in the programming needed for the old system so they often forced requirements to show as complete. Often these requirements would be incorrectly marked on student's report as completed, waived courses would be shown as having been taken and course substitutions would be improperly used. The use of the archaic system was due to the decision of a high-level administrator that was not involved in the process and did not have intimate knowledge of the actual needs of the advisors. The previous system had been used for many years and was upgraded in 2007. The upgraded look was already out of date when it was finally implemented and it still lacked in new functionality and usability.

Some employees were reluctant to change to a new system while others complained in open meetings, formally and informally, and expressed the need for a more usable and effective solution. Changing to a new system, no doubt, came with a cost. Many discussions were held with the University's college advisors about the type of functionality they would like to gain while still providing students with personal advising. For the long term, knowing the university was still growing, it was clear that a new and more comprehensive advisement tool could better assist students, staff and faculty advisement efforts. This would lead to an improvement in the overall advising experience. Even though the College of Graduate Studies knew it would benefit the college staff, it was hoped that the new, advisement system, being more comprehensive, could allow for self-advisement in some programs, thus freeing up valuable faculty time to help students with research or other productive activities instead of administrative duties. At the end of the research phase in 2010, The College of Graduate Studies and the key advisors decided to

use the PeopleSoft Advising Tool. We kicked off the implementation of the project in March 2011. We tested the functionality in spring 2013 and went live with advising and graduating all students with the PeopleSoft Advising Report in summer 2013.

Since we knew this would be a large project and some key users were reluctant to change, we decided to use a User-Centered Design (UCD). We also chose UCD because we wanted the subject matter experts to design the system in a way that would benefit them in their everyday work.

The purpose of this dissertation is to demonstrate a User-Centered Design of a system in a case study at the University of Central Florida.   "User-centered design is both a design philosophy and a process focused on optimizing interfaces in response to how people work, rather than expecting people to alter their work habits to accommodate the demands of the interface" (Tempelman-Kluit & Pearce, 2014, p.17). We wanted the users to "develop a model to explain the operation of the system" (Norman, 1988, p. 189) according to how they wanted it to work for them and we needed it to be as standardized as possible across all of the degree programs at the university.

The focus of this study will be on the advisement of graduate students and the systems that the University of Central Florida has put in place using User-Centered Design with the academic college staff. The study will demonstrate how we used " user-centered design in a critical, reflective, and multilayered manner" (Tempelman-Kluit, & Pearce, 2014, p. 616). New systems were implemented in order to provide a more user-friendly advising system for the advisors, designed by the advisors, which would be multi-functional. It would provide both advisement information to students and information that would allow staff to certify students for graduation.

Conceptualization of the Problem

National History on Advising Systems

Student advising has historically taken many different forms all with the goal of assisting the student as they work toward their goal of completing their degree. Below are a few examples that illustrate the evolution of student advising at selected institutions and how these institutions incorporated computer systems using different methods.

At the University of Maryland in 1987, "a small group embarked on an experiment to enhance student advising using student data downloaded from the administrative mainframe to PCs." (Areu, Klavon, Munn, 1989, p. 24). This system and method of advising grew in popularity since it offered advisors the ability to view records, make electronic notes, and search for students with similar characteristics, mail merge functionality, report writing, academic audits, statistical analysis and management tools (Areu et al., 1989, p. 30). The academic audit did "aid the advisor in examining the advisee's academic record" (Areu et al., 1989, p.30). The system programmed academic requirements and matched them against a student's record. This made the advising sessions much more productive since the advisor could focus on other advising aspects, such as professional development and career planning. One limitation and future improvement of this system was that the information was only available to the advisor and not to the student.

Many early advising systems were a series of people, from peer advisors, to professional advisors and to faculty advisors. According to David Crockett, "the bottom line of effective advising is improved educational/career planning, academic success, student growth and development, and lower dropout rates" (1982, p.1). Crockett's system consisted of a form that

students filled out and then turned in to an advisor. The advisor then analyzed the form and developed an action plan for the student.

In 1992, the University of Wisconsin-LaCrosse developed a system that allowed students to enter their courses taken and grades into a computer. The student then saved the information on a diskette and took it to an advisor. The advisor read the information on the diskette and assisted the student in matching the courses with a degree program and further requirements. This was referred to as computer–assisted advising. A term coined by Gary Kramer (Kramer & Others, 1994).

William Wehrs stated, "advising systems were well-suited for academic advisement using an expert system application for two reasons. First, it is naturally a consultation process between student and advisor. Second, the majority of the expertise can be codified as curriculum requirements" (Wehrs, 1992, p. 1).

In 1992, a grant awarded to Portland Community College allowed the college to develop a system to combine information across student services units. The development team created a student tracking system using a computerized method. Professional advisors were trained on the computer system, how to use it to advise students, and create documentation regarding the advising conversation. The purpose of the grant was to provide better quality advising, with the hope that this would lead to a greater number of students completing their degrees (Bach & Others, 1992, p. 4). This system was a mainframe system that allowed advisors to see limited access regarding advisees and it was not accessible to students.

In 1994, Brigham Young University was using the "Advisement by Computer" method. Advisors had access to curriculum degree requirements and students' academic records. When a report was run for a student, "a program would match the student's record to degree

requirements and display the results" (Kramer, 1994, p. 151). The advisors printed out these reports during each advising session. Advising offices also delivered the reports to students at the beginning of each semester when they met with their advisor for course registration and planning.

 Although they were printed out and the student did not have direct access to the information, "the reports did provide detailed information on major requirements, substitutions, waivers and transfer work, repeated coursework, identified which courses would meet graduation requirements, and determined acceptable versus unacceptable grades" (Kramer, 1994, p. 152).

In 1996, Pennsylvania State University developed their version of an advising system. This limited system allowed for students to calculate Grade Point Averages (GPAs). In addition, it allowed students to "calculate semester and cumulative grade-point averages based on a student's predicted grades for the current enrollment period (Leonard, 1996, p.47).

In most cases, those close to the advising experience created advising systems for graduate and undergraduate students. The efforts enhanced the student and advisor experience. The systems helped advisors spend less time looking at and analyzing data. This, in turn, allowed more time to provide advice on career paths or university policies and procedures. "Technology supported academic advising enhances the advising process along four key dimensions: reliability, consistency, accuracy and scalability" (Kramer, 2000, p.81).

Since the mid- 1990's different graduate programs at UCF have used different tools in order to advise and graduate students. Sometimes a faculty member and a student would write a plan of study on a napkin during a lunch conversation. Alternatively, programs used a curriculum template on a piece of paper that students would check off as they completed the courses. Non-course requirements were sometimes included on the template and sometimes they were not. An advisor would then enter this information in a system called Student Academic Support System (SASS). Later, the UCF technical team upgraded the system to the Degree Audit Reporting System (DARS). Between 1995 and 2010, the College of Graduate Studies, the programs, and the academic colleges they fall under, worked together to find better solutions.

Between 1995 and 2007, the College of Graduate Studies worked with each academic college to enter their programs' requirements into SASS. SASS was hard to read and it did not easily handle changes to a student's course requirements. It was still an improvement over the paper reports. In the year 2007, administrators at the university decided to upgrade the system from SASS to DARS. DARS was a minor upgrade from the SASS product. The implementation of this project was not well organized and the usefulness of it by the staff across the university involved in the degree certification process was highly debated.

 Information entered into DARS did not show in the student system until the following day, so real-time information was not available. The system was unreliable since some days information from the interface between the DARS system and the Student Information System (PeopleSoft) would show and some days it would not. The DARS system was not easy to read and did not show non-course related requirements. Advisors in the colleges were also able to

manipulate degree audits to show that a student met requirements, when in fact, they had not. Approximately 15 audits each semester, in different colleges would be identified as having been manipulated.

When students went forward to the Graduate Council Appeals Committee with a petition, each program's audit format was different which caused confusion for committee members. In addition, many mistakes were being made when certifying students for graduation. Often, master's level students would not realize that they did not meet requirements until after they had walked in the graduation ceremony.

I realized that a standardized Plan of Study and centralized requirement building would improve the ability of the advisors to review graduation requirements. It would also provide a standardized report for the Graduate Council Appeals Committee. It would deliver an at a glance status of student progress for faculty and provide an overall degree status for students. Numerous discussions were held with the college advisors about what they would want to see in a standardized report and a wish list for items to show on an advising report was created. The college advisors agreed that the wish list items would speed up the advising process and the degree certification process. They would be able to go to one place to see everything they needed instead of hunting around in the system to review multiple requirements.

I knew there had to be a better way to help advisors have a standardized report that would help end users to view progress on all types of requirements and to know when to certify degrees. Employees in the Graduation area of the College of Graduate Studies and I conducted researach to determine what other universities of similar student size were using to assist users in advising their graduate students and a variety of options were explored. Some universities used

DARS, some used PeopleSoft, others used a "homegrown" system and others used PeopleSoft with significant modifications.

However, those that used PeopleSoft were more satisfied with their system than others. PeopleSoft is part of our current Student Information System so we researched this option further. Demos of the functionality were provided and over time, we concluded that this would be an extremely helpful tool for end users. This tool would save a great deal of time in advising and awarding degrees. It would also save a lot of time in maintenance for our computer services employees. It seemed like a winning option for many different offices. Of the schools that we spoke to, most schools that have an advising system in place for graduate students were using PeopleSoft, while very few schools were using DARS to advise graduate students. Table 1 below reflects the variation of advising tools used at the different universities.

Table 1: University advising comparison

School	DARS	PeopleSoft	Homegrown
University of Florida			√
Arizona State University		√ with Mod	
North Carolina State		√ with Mod	
Northern Illinois		√	
Florida State University			√
University of Wisconsin, Madison	√		√
University of Southern California	√		√
Florida International University		√	
University of Massachusetts		Under consideration	

From the staff we spoke to, and at each presentation, we heard positive comments regarding the PeopleSoft option. We were informed that centralization of requirement building and exception processing was ideal. If we could implement our project accordingly, we would be able to maintain the standards that were used at the time we first implemented the system. We did decide to implement our project this way. After further discussion, we decided that the best way to receive information related to exception in the Plans of Study would be to use an electronic form discussed further in Chapter 2). Changes in requirements would need to be entered based on each catalog that is published each summer.

After all of our research, we realized that, the key benefits that PeopleSoft would provide to faculty, students and staff would be:

- Real-Time updates and 24-hour access to a student's Plan of Study
- The ability to view transfer credit, review completed courses and monitor in-progress coursework
- The ability to access the number of courses or other program requirements needed to complete your degree
- The ability to simulate "WHAT IF" scenarios and determine the impact of course changes or program changes
- The ability to display progress in non-course requirements
- Allows for class enrollment directly from the Interactive Report
- Training in a variety of formats

An Executive Summary (Appendix H) was prepared based on the research we had performed. The summary included financial need for implementation, resource needs, improvements that would be seen after implementation and overall benefits to the University's college staff. The summary was presented first to the Dean of the College of Graduate Studies. She agreed that this was a worthy effort and wanted to move forward with the process.

Next, we presented the project proposal to the Provost and College Deans. After several questions, they agreed that the benefit would be significant and recommended that we present the proposal to the College Associate Deans that oversee the College graduate areas. The College Associate Dean's also agreed that this was a worthy project.

We then presented the project proposal to the University's college staff that advise students and certify their degrees within their respective colleges. We informed them that updating of requirements and exceptions would be centralized in the College of Graduate Studies. Many were relieved they would no longer have this workload. They also saw the benefits of the new system. Many were eager to move away from the current system they were

using. They wanted to be involved with the transition and they were included as a part of the implementation team.

<div align="center">The Project</div>

The implementation phase of a new advisement tool that started in March 2010 went live with a test sample in June 2012. We took this step in hopes that it would provide a more comprehensive view of a student's progress to degree.   Providing students with more information at their fingertips could help them to understand where exactly they stood in their progress to degree. The new system was also intended to shorten the amount of time that advisors spend advising and awarding degrees since the information will be clear and easy to read. In this project, we built academic requirements for all graduate students.

This project focused on implementing a new advisement system for the use of 8,000 active graduate students and their advisors. Involved in the project were subject matter experts in tracking academic progress, graduation requirements, graduation certification, and computer services. The team consisted of six members from the College of Graduate Studies, 11 members that included the advisors and graduation certification staff in the academic colleges and two computer services employees.

A consultant group was brought in to ensure we understood the functionality available to us. A consultant took us through a one-week mini training session so that we could figure out what functionality we wanted to use and what functionality would need to be modified by computer services. The consultants also assisted with the building of the program requirements. One employee in the College of Graduate Studies worked with the consultant to build the requirements. One employee in CGS worked with UCF Computer Services for technical changes. Two employees from Computer Services worked on the development of the

advisement module. Subject matter experts who were the advisors from each of the University academic colleges met with the of Graduate Studies frequently to ensure we had their input on exactly what they needed to review on the report. They would be using this report to graduate students so it was of great importance to have their input and approval on what the end product would look like and how it would work. There was also one project manager that oversaw the project and the timeline.

Deliverables

The overall project was managed in an excel file which indicated the deliverable item, the resource assigned to it, status, obstacles, due dates and notes.

Deliverables included:

- Pre-Planning with Computer Services
- Fit/Gap Analysis
- Student Records Set Up
- Student Records Data Clean Up
- Configure Requirements for Programs
- Creation of eForm for exception processing
- College and Program Testing
- Develop reports for programs
- Internal Graduation Team Testing
- Conversion
- Communication and Roll Out Plan
- Training
- Go Live Activities

Evaluation

During the first year, advisors informally consulted with us on ways we could improve the system. Many we were able to implement. In December 2014, after using the new advising tool for the entire year, we formally asked the end users in each college for feedback on the system in a short survey format. The results are discussed in Chapter 5.

Summary

After years of using SASS and DARS, the College of Graduate Studies staff and the graduate staff in the academic colleges, wanted a tool that was better suited to tracking, advising and graduating graduate students. The College of Graduate Studies researched applications that other large-scale universities used for this purpose. They found that universities, for the most part, either built their own system or used PeopleSoft. After examining the Pros and Cons, the College of Graduate Studies decided to use PeopleSoft. The product provided more benefits that supported the tracking and graduating of graduate students. The decision to use Peoplesoft was approved by the University Computer Services, the Deans, and the Provost at the University of Central Florida. An expert consultant group was brought in to assist the team with decisions regarding functionality options available in the system.

Since we wanted to develop this new report to meet the needs of the University's college staff, we used a User-Centered Design Approach (UCD). Using this approach," it was essential that we included the end users at the beginning, middle and the end of the project" (Nielsen, 2013,). They needed to have input into the product design and understand the purpose of each step throughout the process. "A typical UCD model includes, analysis, design, implementation and deployment," (Templelman-Kluit & Pearce, 2014, p. 617). The key college staff that certify graduation for their colleges and the graduation staff in the College of Graduate Studies held frequent meetings to determine what they wanted the final product to work and look like.

Additional meetings held with the Computer Service's technical team and the consultants ensured what the team was asking for was possible in the system. Users then wrote up specifications and provided them to computer services for development.

During key stages of development, the functional team reviewed the product to make sure the report was on schedule and looked like it would meet specified requirements. As specifications were completed, the functional team would test the system to check for completion and that the ability of the product to work under a variety of different scenarios. After testing, end users developed training on how to access the system and how to read the system. The team developed a communication plan about the new advising tool. Its purpose was to inform the graduate community about the new system, what advantages it would have and when it would become available.

All of the phases from the decision-making through implementation and evaluation will be discussed in more detail in the following chapters. Chapter 2 will discuss functionality design and development requirements. Chapter 3 will focus on conversion, testing and implementation. Chapter 4 will show the results of the survey questions. Chapter 5 will discuss the overall project and future enhancements.

CHAPTER 2: SYSTEM DESIGN AND DEVELOPMENT

Determining Existing Functionality and Identifying Additional Development Needs

In order to learn the system functionality in detail, we arranged for a week of training with a consultant. This gave our core team an in-depth look at the Advisement Module and the flexibility that existed in the system that we could use in order to meet our needs. During this time we also identified gaps in the system where functionality did not exist but was required for either university business processes, university policy tracking or ensuring graduation requirements were met. The core team was initially five members in the College of Graduate Studies and at least one member from each of the Academic Colleges that knew intimately the user tasks and needs for themselves, and the college staff in order to graduate students.

Gaps in functionality were outlined in very specific technical documents and discussed with computer services (see Fit Gap document Appendix F). They agreed to modify the system in order to fill in the gaps and offered additional insight and functionality that could be gained. Some of the larger gaps in functionality that were identified were:

- Displaying comments

- Displaying checklists

- Displaying course history

- Transfer work display and functionality

- Method for programs to communicate exceptions needed

- Overall look of the PDF to reduce the length of the report

- Display of specific demographic information

- Identification of UCF Advisement Report

<u>Creating the Overall Design and System Functionality</u>

After the training and discussion with Computer Services, we developed a mockup of what we wanted the Advisement Report to look like. We had to create two versions. One version was what the online, interactive report would look like and the second was what the PDF, printer friendly version would look like. The new report would be called the Graduate Plan of Study or GPS.

We also developed a timeline for when we expected the entire project to be implemented. As one of our first steps, we knew we had to build the requirements for each program. After researching how many students we had in each catalog year, we determined that we had to build course and program requirements going back to 2007 in order to serve as many students as possible. We had to allow time for computer services to complete the modifications and we had to convert data from the old system we were using into the new system.

This is where we further implemented the Client Centered Design Approach which" explores the needs and preferences of users." (Bordac and Rainwater, 2014, p.110). We took the mock- up version to the college staff for the review and input. This served two purposes. First, they were able to better understand how the report would look and work since they had something to visually review. It also gave them an opportunity to identify areas that were or were not needed on the report for advising and certification processes. At this point the user review that was conducted lead to additional design and functionality requirements. It also established buy-in from the users since they could see that their input was valued and their

suggestions implemented to ensure the product would be easy to use. At each stage of development, a new mock-up was presented to the college staff for review.

There were often times were college staff members did not agree on functionality. When this occurred, negotiation among units came into play. In order to maintain a collegial environment, we would discuss the pros and cons of the functionality. We would also discuss how much development work it would take computer services to do and if the new functionality would impact the time line to go live. If the functionality was easy to program, we would implement it. If the functionality created a large amount of new programming for computer services we did not implement it and we put it on a Phase 2 list for future enhancements. As in the Brown University Experience implementing a new library system, "a commitment to experimentation and a willingness to jettison design and functional elements which did not meet user approval kept the design process agile and flexible" (Bordac & Rainwater, 2008, p. 109). This method enabled us to continue the project with users remaining with a positive spirit and continued the buy-in necessary to change and improve the design as possible or needed. The team overall worked well together and made decisions quickly after hearing the pros and cons of the various options available to implement their needs.

After most of the development by computer services was completed, we were able to show the college staff a "live" version of the advisement reports. We began by walking them through the interactive report to demonstrate how it worked. We showed them the functionality they requested, as well as, additional functionality available in the new system that they would benefit them and the students.   Some of that functionality included being able to register for classes directly from the report and the ability to run "what if" reports if the student was interested in changing programs.   The overall response was very positive. Some feedback was

provided and noted for future enhancements. Then we showed them the PDF or printer friendly version which is the document that would be used to certify degrees. Again, this was met with a positive response with some suggestions for changes for the future.

<u>Transforming the Specification into the New Report</u>

We started with the catalog year 1997-1998 and moved forward in academic years to include as many students as possible with the new reporting capability. We built both course requirements and non-course requirements. We included tracks and thesis/non-thesis options. This meant that over 350 programs and their requirements needed to be built. Over 25,000 rows of exceptions that were in the old system were converted to the new system.

The overall planned timeline for the project was to take two years. All modifications completed by Computer Services should have been completed in 1.5 years to allow for adequate testing. All requirements for programs should also have been built within 1.5 years to allow the programs to review and test their new advisement report. The 25,000 rows of data that needed to be converted from the old system to the new system required two full years to complete and the hiring of six temporary workers for this work. We expected that we would graduate a small group of students as a test group in the summer 2012 and then graduate all students with the new advisement report in December 2012.

<u>The New Design</u>

The Interactive Report

After much anticipation, testing and re-testing, the computer services team was finally ready to reveal to us the final product for the interactive report. This report would be used by students to understand their progress to degree completion, to review course options that met program requirements and to register in courses directly from the report. For a complete view of the Interactive GPS, please refer to Appendix E, and for a printer friendly version of the report please see Appendix F.

In order for the users to know which report they were reviewing, the staff requested the developers to program the student's name and ID to show at the very top of the report. They next asked for an indicator if it the report was for a graduating student. Since reports may change over time, it was important for the user to have a time and date stamp to reflect the information covered in the last advising session. Next was a section to indicate the program and advisor of the student. Details regarding the student's status and demographic characteristics often are needed during advising sessions so the college advising staff asked for this which had not existed on the previous reporting system to be included. Computer services added this information based on end user need and specifications. This section displays below if Figure 1.

Student Name ID: 1234567

Graduate Plan of Study (GPS)

University of Central Florida | Graduate

This report last generated on 01/23/2015 12:21PM

Help and Tutorial

ACADEMIC PROGRAM AND ADVISOR
Education EdD

Funded Student: No   **International:** No
Earliest Admit Term: Fall 2008   **Catalog Year/Term:** Fall 2008
  Current Status: Filed Intent to Graduate
Intent to Graduate on File: Spring 2015
Masters Along the Way: No

Figure 1: GPS student characteristics

The next section of the report displayed in Figure 2, shows collapse all, expand all and printer friendly buttons.   The collapse all button is usually selected when the student has met all requirements and there is no reason to review each requirement area. Expand all is most often selected since this is how you see what requirements the student has and has not completed. It provides the clearest view of a student's overall status. As the students satisfy the requirements in the GPS to fulfill their degree, the GPS functionality will collapse that requirement automatically. The printer friendly button is selected for a PDF version of the report. A sample of this report version can be seen in Appendix F.

A disclaimer is also added. Since human and technical errors can show as errors on the report, the disclaimer was added so that students realize there will be a final human check before

graduation requirements are fully certified. Also, a legend was added for understanding of the

different types of courses that will appear on the report.

Figure 2: GPS General Information

The next section (Figure 3) includes the main information sections for the staff. First an

indicator shows if All Requirements have been met. The second indicator is the Graduate Status

GPA. Only students with a 3.0 or higher in this field can graduate. Moving to the Graduate

Doctoral Policies, (or Master's policies as appropriate), this section lets staff know if students are

violating any university or graduate policies. Courses violating policies will either need to be

removed and not used to meet degree requirements or if there is an exception reason, students

may petition that the course be used in their degree requirements. A faculty committee reviews

the petition and forwards their recommendation of approval or denial to the Vice President and

Dean of the College of Graduate Studies. If approved, then an exception is made and reflected in

the GPS.

Figure 3: GPS Graduate Policies

Course requirements are shown next in Figure 4. Courses that can be used to meet program requirements display along with the number of credit hours, and a status of taken, not taken or in progress. If the course has been taken, the semester it was taken and the grade earned displays. Sometimes programs have a core course section, an electives section, a required electives section, a specialization section and a thesis or dissertation section.

▽ REQUIRED COURSES (RQ1512;LN10)

Satisfied: Required Courses

- Units: 24.00 required, 24.00 taken, 0.00 needed

Course	Description	Units	When	Grade	Status
The following courses may be used to satisfy this requirement:					
IDS7502	CASE STUDIES IN RES DESIGN	3.00	Spring 2011	A-	✓
IDS7501	ISSUES & RESEARCH IN EDUC	3.00	Fall 2010	A	✓
IDS7938	RESEARCH CLUSTER SEMINAR	3.00	Summer 2010	A-	✓
EDF6464	MIXED METHODS FOR EVALUATION	3.00	Spring 2010	A	✓
EDG6285	EVALUATION OF SCHOOL PROGRAMS	3.00	Fall 2009	A	✓
IDS7938	RESEARCH CLUSTER SEMINAR	3.00	Summer 2009	A	✓
EDF7916	ANAL SYNTHESIS OF EDUC LIT	3.00	Spring 2009	A	✓
IDS7500	SEMINAR IN EDUC RESEARCH	3.00	Fall 2008	A	✓

View All | 🗗   First ◀ 1-8 of 8 ▶ Last

▽ OR SPECIALIZATION-ADVISOR APPROVED (RQ1512;LN60)

Satisfied: Students must meet with an advisor for approved electives.

- Units: 15.00 required, 18.00 taken, 0.00 needed

Course	Description	Units	When	Grade	Notes	Status
The following courses were used to satisfy this requirement:						
EDA7225	EDUC PERSONNEL	4.00	Spring 2007	A	01	✓
EDA6939	SEM ED ADMIN	3.00	Fall 2006	A	04	✓
EDA6232	LEGAL ASP SCH OP	3.00	Summer 2006	A	05	✓
EDA7192	ED LEADERSHIP	4.00	Summer 2006	A	03	✓
EDA7195	POL GOV FIN ED OR	4.00	Spring 2006	A	02	✓

View All | 🗗   First ◀ 1-5 of 5 ▶ Last

Figure 4: GPS Course Requirements

The next section in the report displays part of the non-course requirements. If a student is completing a thesis or dissertation similar milestones will show in this section (Figure 5). As each item is completed, it changes from red to green and indicates the item is satisfied. Also, a date will appear showing when the item was completed. If a committee is required for the milestone item then, the committee members and their role on the committee display.

GRADUATE MILESTONES: DOCTORAL (RQ1054)

Not Satisfied: Graduate Milestones: Doctoral

CANDIDACY EXAM (RQ1054;LN10)

Satisfied: Candidacy Exam

Date Completed: 5/27/2011
Advisor: Dr Burnice Hayes
Advisor: Dr Mary Little
Chair: Dr David Boote
External Committee Member: Thomas Vitale

FORMAT REVIEW (RQ1054;LN20)

Not Satisfied: Format Review

DEFENSE (RQ1054;LN30)

Not Satisfied: Defense

DISSERTATION TITLE (RQ1054;LN40)

Not Satisfied: Dissertation Title

FINAL SUBMISSION OF DISSERTATION (RQ1054;LN50)

Not Satisfied: Final Submission of Dissertation

Figure 5: GPS Milestones

Doctoral students also need to complete specific University Requirements (Figure 7).

These requirements are also required to complete applications for the National Science

Foundation (NSF) and other grants. The requirements include completion of the online CITI

module and four, face-to-face workshops that cover various aspects of integrity and responsible

conduct of research. These requirements must be completed before a student can advance to

candidacy and enroll in dissertation hours.

Figure 6: GPS University Requirements

When programs need additional indicators for non-course requirements, they have a specific section called PROGRAM SPECIFIC REQUIREMENTS (Figure 8) where these requirements can be documented and tracked. These items can be anything the program requires in addition to courses. Often, qualifying exams, comprehensive exams, publications, research study, presentations, and teaching requirements will be options in this area but the requirements are specific to each programs' needs.

Figure 7: GPS Program Specific Requirements

The above figures show how the information looks to the student. For the advisors, they update the status of checklist items in a secured area in PeoplSoft. The page in PeopleSoft is shown in figure 8 below.

Figure 8: Checklist process for advisors

The last section of the report (Figure 9) shows a students Graduate Course History. Any Graduate Course that was taken, whether it counts in the program or not, will show in this area.

Term	Subject	Catalog Nbr	Title	Grade	Units	Status
Fall 2013	OSE	5203	GEOMETRIC OPT AND IMAGING SYS	A	3.00	✓
Fall 2013	OSE	5312	LIGHT MATTER INTERACTION	A-	3.00	✓
Fall 2013	OSE	6111	OPTICAL WAVE PROPAGATION	A	3.00	✓
Spring 2014	OSE	6115	INTERFERENCE AND DIFFRACTION	B+	3.00	✓
Spring 2014	OSE	6432	GUIDED WAVES AND OPTOELECTRONI	A	3.00	✓
Spring 2014	OSE	6525	LASER ENGINEERING	A	3.00	✓
Summer 2014	OSE	6265	OPTICAL SYSTEMS DESIGN	A	3.00	✓
Summer 2014	OSE	6526C	LASER ENGINEERING LABORATORY	A-	3.00	✓
Fall 2014	OSE	5414	FUNDAMENTALS OPTOELECT DEVICES		3.00	◆
Fall 2014	OSE	7919	DOCTORAL RESEARCH		6.00	◆

Figure 9: GPS Course History

EForm Design and Development

A decision that was made early during the fit gap sessions, was that not only would the degree requirement building be centralized but the processing of exceptions to a student's degree program would also be completed centrally. The core team discussed how programs would communicate these exceptions to the College of Graduate Studies for processing since there are over 5000 processed per semester.

After discussion with the team and computer services, we decided on an electronic form that could be routed from the program, to the Academic College for review and then to the College of Graduate Studies for review, approval and processing. The routing is shown below in Figure 10. Since there are various types of exceptions the form was created with multiple sections. Each section is described below. For a complete view of the eForm, please refer to Appendix H.

30

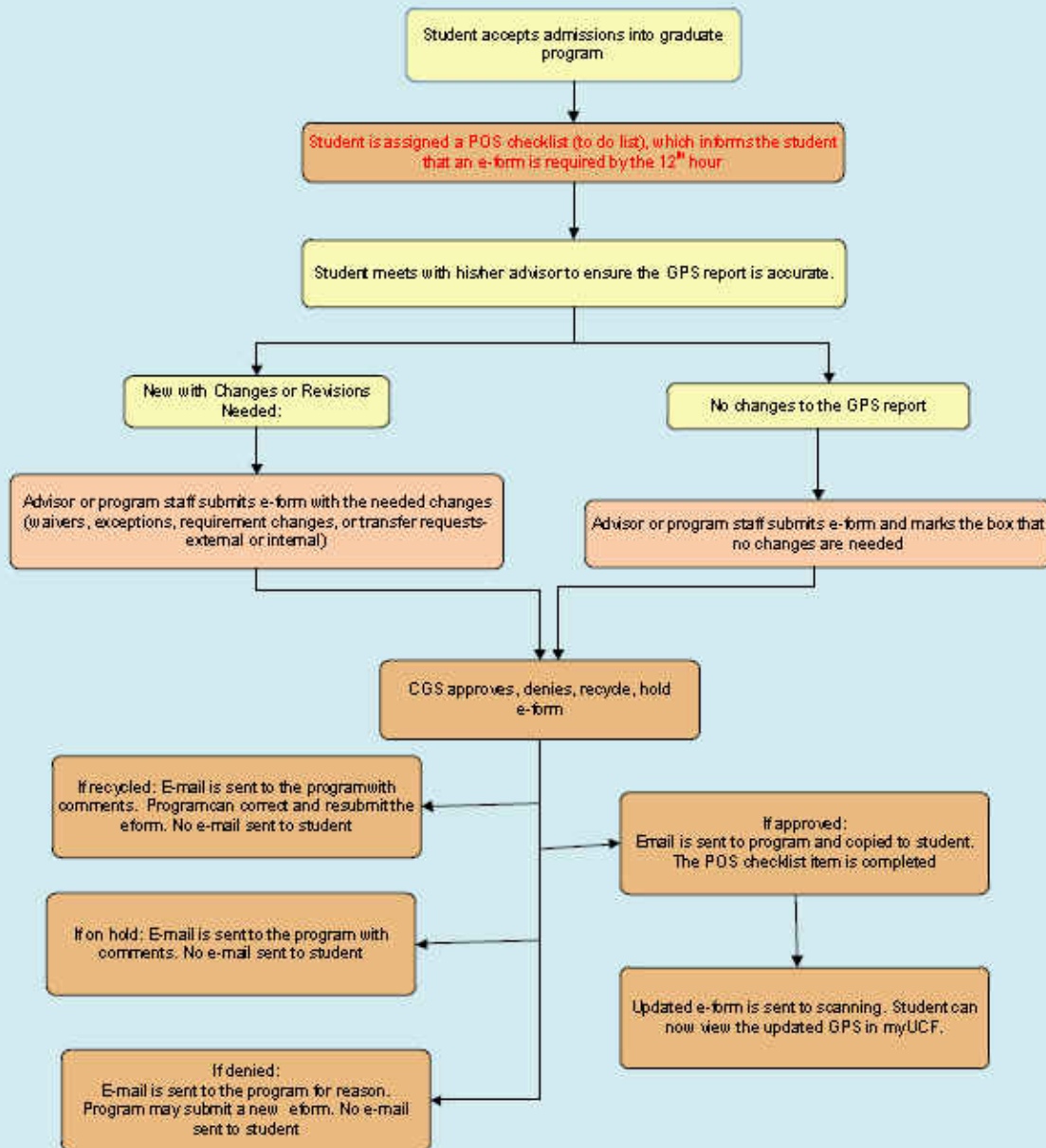## Graduate Plan of Study (GPS) Exception E-Form

Figure 10: The flow of an eForm when a student needs exceptions to their GPS.

ORACLE

Empl
ID:
First Name: eForm ID: 420739

Last Name:

Student Program (major): EDPHD Education PhD

Student Sub-Plan (track), if applicable: PHD-HSPED   Hospitality Educ PhD Trk

Program Action: MATR Matriculation   Student Program/Plan   Run GPS

Requirement Term/Catalog Year: 1400   Fall 2010   Classification: GREG Grad Regular Admission Status

Earliest Admit Term: 1400 Fall 2010   Expected Graduation Term:

Email Address: EADTest@ucf.edu

Graduate Plan of Study

A Plan of Study eForm should be on file with the College of Graduate Studies by the end of the second major term of enrollment (based on full-time enrollment).

○ No Changes Needed to the GPS
○ New GPS exceptions needed
○ Revision to existing GPS

Graduate Status Change
☐ This student is in the thesis option
☐ Requirement Term/Catalog Year Changes
☐ Classification Changes
☐ Program/Plan add/change
☐ Student is receiving a "Masters along the way"

Advising Document Attachments

File size limit is 3 MB and only pdf, word, excel and jpg file attachments are allowed.

[Add File Attachment]

Comments

Your Comment:

[   ]   [Submit]   [Hold]

[Save]

Figure 11: eForm section

Figure 11 has three main sections to it and I describe each in a separate figure. The first section, which is figure 11 displays when a program will submit information about changes to a student's status in the system. They can also indicate that changes need to be changed to a student's GPS and if one of the check boxes is checked, additional fields will display to fill out with more details of what is needed to process. This example shows a completed GPS where a program is asking to move a doctoral student to a master's program. The form has been completed by the college staff and is waiting for the approval and processing by the College of Graduate Studies.

ORACLE

Evaluate Graduate Plan of Study

Step 1 of 2: Evaluate Graduate Plan of Study

If the form meets your approval, click Approve. If you want the originator to make changes and resubmit the form, enter an explanatory note and click Recycle. If the form should not be executed, click Deny, which will stop processing of the form.

Enter any relevant comments in the "Your Comment" field to be included with this form.

Current Student Information

Empl ID: 1234567   eForm ID: 410043

First Name: Ima   Last Name: Knight

Student Program (major): PHPHD Physics PhD

Student Sub-Plan (track), if applicable: PLNETSCIPD   Planetary Sciences PhD Trk

Program Action: MATR Matriculation   Student Program/Plan   Run GPS

Requirement Term/Catalog Year: 1520 Fall 2014   Classification: GREG Grad Regular Admission Status

Earliest Admit Term: 1520 Fall 2014   Expected Graduation Term:

Email Address: IMA@knights.ucf.edu

Graduate Plan of Study

A Plan of Study eForm should be on file with the College of Graduate Studies by the end of the second major term of enrollment (based on full-time enrollment).

○ No Changes Needed to the GPS
○ New GPS exceptions needed
◉ Revision to existing GPS

Graduate Status Change
☑ This student is in the thesis option
☑ Requirement Term/Catalog Year Changes
☑ Classification Changes
☑ Program/Plan add/change
☐ Student is receiving a "Masters along the way"

Figure 12: eForm changes to student's GPS

The above reflects the first section for this student. In the next figure 13, you will see how the program reflects that a student would like to change catalog years.

34

ORACLE

Evaluate Graduate Plan of Study

Step 1 of 2: Evaluate Graduate Plan of Study

If the form meets your approval, click Approve. If you want the originator to make changes and resubmit the form, enter an explanatory note and click Recycle. If the form should not be executed, click Deny, which will stop processing of the form.

Enter any relevant comments in the "Your Comment" field to be included with this form.

Current Student Information

Empl ID: 1234567   eForm ID: 410043

First Name: Ima   Last Name: Knight

Student Program (major): PHPHD Physics PhD

Student Sub-Plan (track), if applicable: PLNETSCIPD Planetary Sciences PhD Trk

Program Action: MATR Matriculation   Student Program/Plan   Run GPS

Requirement Term/Catalog Year: 1520 Fall 2014   Classification: GREG Grad Regular Admission Status

Earliest Admit Term: 1520 Fall 2014   Expected Graduation Term:

Email Address: IMA@knights.ucf.edu

Graduate Plan of Study

A Plan of Study eForm should be on file with the College of Graduate Studies by the end of the second major term of enrollment (based on full-time enrollment).

○ No Changes Needed to the GPS
○ New GPS exceptions needed
● Revision to existing GPS

Graduate Status Change
☑ This student is in the thesis option
☑ Requirement Term/Catalog Year Changes
☑ Classification Changes
☑ Program/Plan add/change
☐ Student is receiving a "Masters along the way"

Requirement Term/Catalog Year Changes

A graduate petition must be filed by the student if the student wishes to revert to a previous catalog which is earlier than the latest admit term.

Change Requirement Term to: 1520 🔍

Figure 13: eForm section for Student Changing Catalog Year

Below in figure 14 is a graduate program asking the College of Graduate Studies to change a student from a doctoral student to a master's student due to poor performance.

Program/Plan add/change

Add/Change Program (major) to: PHMS 🔍 Physics MS
Add/Change Sub-Plan (track) to: PLNETSCIMS 🔍 Planetary Sciences MS Trk
Reason for add/change: Student did not do well in PhD Program

Figure 14: eForm section for changing a student's academic level

In figure 15, the program is providing a reason for the change in academic level.

Classification Changes

Change Classification to: Discontinue PhD - Put in Masters ⌄
Reason for Change: Student did not pass PhD course

Figure 15: eForm program provides justification for change

In the Course Waiver section below, program staff can decide if they think the student already has particular course content and waive particular courses and the student would not have to take them. Instead the students would take other courses where they need more expertise.

Course Waivers

Personalize | Find | View All | 🗗 | 🔣   First ◀ 1-2 of 2 ▶ Last

	Waiver Type	Institution where course was taken	UCF Course Prefix	UCF Course Number	RQ Line No	Notes		
1	Prev Deg ⌄	Rensselaer Ploytechnic Institute			RQ1405;LN30	Transfer 9 credit hours from an earned MS degree	+	−
2	Prev Deg ⌄	Rensselaer Ploytechnic Institute			RQ1405;LN50	Transfer 15 credit hours from an earned MS degree	+	−

Figure 16: eForm program indicates Course Waivers

Graduate program advisors are able to determine if they will accept transfer work from other programs at UCF or from other universities. The section shown below reflects how programs would inform the College of Graduate Studies of this decision and approval so that it can be processed.

Figure 17: eForm Plan of Study Change Process Using Electronic Form

The UCF Course Moves section allows for graduate degree program advisors to inform CGS about courses that a student has taken at UCF that they would like to use in the student's GPS. This would be routed through the college and then to CGS for approval and processing.

Figure 18:eForm UCF Transfer Work

The Advising and Document section below is where authorized processors can upload documents that they want to be part of the student's permanent file. The attachments are sent to UCF's image system call Viewstar.

In this section, authorized users also approve, deny or recycle the form. A form is recycled if more information or corrections are needed. Comments are always made in the Comment History box so that others can follow if additional instruction or information is added.

Figure 19: eForm attachments and approval

We knew that change could be difficulty for some people. Since buy-in from the college advisors was critical from day one in order to make the change from the DARS system to the PeopleSoft system successful, we involved the staff early on. They were involved in the order the requirements displayed, the formatting of the requirements, the use of the milestones, the functionality of the policies, the legend and had input into every other piece of the GPS. They also assisted in created the flow of the eForm and all of the fields necessary on the form. "Although we recognized the importance of sharing the process with staff and gathering their feedback early on, we also recognized the importance of adhering to the overarching goal of the new product: to focus on the end user," (Tempelman-Kluit & Pearce, 2014, p. 113).

CHAPTER 3: CONVERSION, TESTING AND ROLLING OUT THE SYSTEM

Conversion

In order to move to the new system seamlessly, we needed all of the information in the old system moved to the new system. It was decided early in the planning phase that all exceptions would be centralized in the College of Graduate Studies. This meant the exceptions would be standardized unlike the old system, and this would take some workload off of the college advisors. This meant that each and every student needed to be reviewed individually in the old system. If they had an exception such as a course substitution or course waiver on their file in DARS it would need to be replicated in the GPS.

The College of Graduate Studies had funding to hire six temporary workers to complete this task. The six workers were trained on how to look in DARS for an exception and how to re-create that exception in the GPS. Many unusual and creative exceptions were found in DARS when doing this review process, which provided an even stronger case for centralizing the exception processing. In some cases students were made to look as if they had completed course requirements when they had not. The six employees processed over 22,000 exceptions in the course of about eight months between April 2012 and December 2012. They continued to process exceptions out of DARS and into the GPS until we were fully live on the GPS in January 2013.

Testing

In January 2011, we started continuous testing of the GPS. We presented all College and Graduate Studies staff with Testing Standards (Appendix C). We tested the report for accuracy and for usability. This was a delicate time during the project. Any functionality or design element that did not meet staff approval was closely assessed. "There was a desire to keep the

design process flexible, but at the same time, not make changes that would impact the timeline unless the lack of functionality was clearly a "show stopper," (R. McCormick, personal interview, October 12, 2014). After the first round of testing completed by the college staff, the core group and computer services met to discuss the comments. Functionality that was easy to fix was fixed. One example was the order that information displayed. We wanted to move the course history to the very end of the page. Some of the functional set up was tweaked. Comments received that required significant programming resources to change added to the Phase 2 list.

We held two focus groups where we invited staff and students to join us. The sessions were held in a computer lab where they could access their GPS. The students had no trouble navigating to the new report. Three students did indicate that their reports were wrong. They were easily corrected during the focus group session by the college staff updating functional information for the student in the PeopleSoft system.

For the next significant round of testing, we asked the programs to send us the GPS for two students from every program that had someone graduating in the spring 2012 semester. By reviewing students that were about to graduate, we were able to test if the complete advisement report for each program was set up correctly.

We found several programs that needed to have their set up modified. The college staff decided they wanted to change a few ways that the program requirements were set up. We also discussed changing the way that some of the University Policies functioned and displayed. University policy tracking was somewhat controversial and staff provided mixed preferences. The college staff met as a group to discuss the issues. After much discussion, conclusions were made on how to show and track each policy. We moved forward with one method and agreed

we would re-visit the functionality after using it for 6 months. We would then determine if the current set up was working well or if changes were needed. After 6 months, there were no more requests to change.

During the summer 2012, college staff were given a choice. They could either send ten students that were graduating in each program or they could send all of their students that were graduating to the College of Graduate Studies on the new GPS. Three colleges sent all of their graduating students on the new report. The remaining college chose to do both reports so they could do a comparison as an extra testing step.

The final round of testing came in the fall 2012 term. All graduating students would be sent to the College of Graduate Studies by the college staff for final review and degree certification using the GPS. At this point the students were not aware of how the degree certification process was being performed. However, communications began to students letting them know that in the spring 2013 term, a new advising report would be available. We explained the new functionality that would be available to them and that further information would be available in the spring semester.

During the fall 2012 graduation term, communication between the college staff and the College of College of Graduate Studies graduate staff was minimal. Very few issues arose. The issues that were discovered were minor and easily fixed by functional staff. The PDF version of the GPS did have some areas that were incorrect and were noted to be corrected for the next graduation cycle. Overall, graduation certification in fall 2012 using the GPS was considered a success and ready to be rolled out to the students and campus population in spring 2013.

Rolling Out the New System

In order for the new GPS to work effectively for the college staff, faculty, program staff and students, all needed to know about the new system and how to use it.

Several methods were used to communicate to the university community based on previous successful implementations by the College of Graduate Studies. Throughout the project implementation timeline several communication initiatives were conducted in order to familiarize each audience with the new system and when they would begin to use it.. A website was also developed to show the project team, explain the reason for the change and to keep updated project information available. For an example see Appendix G.   Exact communication dates fluctuated as the overall timeline shifted. A summary of the timeline and the communication plan is seen in below:

Implementation Timeline (high level) Draft 2011-2012

**Communication of plan and status updates will be sent throughout the project timeline

     -emails

     -newsletters

     -Program director and staff update meetings as necessary

December 2010 through January 2011

     - Interview and secure consultant

     -Communicate with Deans, Associate Deans and Staff about project plan, benefits and resulting process expectations

February 2011

     -send out questionnaires to graduate programs

March/April 2011 (this step will be continuing throughout the project as updates are made)-

receive questionnaires back from programs

    -Set up each programs checklist requirements based on questionnaire data

    -Review questionnaire course and non-course requirements

    -Set up meetings with programs as needed to ensure information is understood and
captured thoroughly

    -Consultant is on board to complete fit/gap analysis

    -Identify/document process needs and modifications

    -Identify/document and begin data clean up needs

    -Make decisions with regard to how items will be tracked (milestones/student groups)

May 2011

    -Specifications for modifications will be delivered to Computer Services

June 2011 through December 2011

    -Set up of course lists, program requirements, checklists, milestones

    -Expect to go back 3 catalog years (more if time allows-will request to move earlier
student catalog years forward if possible)

    -Begin with the College of Business

    -All doctoral programs (order to be determined once questionnaires are received)

    -Master's programs (order to be determined once questionnaires are received)

    -Certificate programs (order to be determined once questionnaires are received)

August 2011 through December 2011

    -development of electronic program of study that will populate the audit

    -Develop preliminary training materials

January/February 2012

       -testing (internal and 3 student focus groups)

       -Further develop the training materials

       -Submit issues to computer services as needed or resolve issues internally

March/April 2012

       - Testing/Training program by program with program staff

       - Submit issues to computer services as needed or resolve issues internally

           (Testing here will be of audit, print functionality)

May 2012

       -Finalize training and documentation and place on staff and student website respectively

June 2012

       -Go live with partial group of students

July/August 2012

       -continue to tweak issues that arise after go live

       -Go live with all graduating students

Spring 2013

       -Roll out to students and campus community to being using to check degree progress

       -begin research and implementation of PeopleSoft delivered functionality to

       programmatically award degrees.

Ongoing

       -build additional catalog years

Communication Roll Out Plan

2011

       -Meet with CGS Deans

       -Meet with College Associate Deans

       -Faculty and Staff newsletter article April 2011 and July 2011

       -Project website to staff is live with project team and "Why we are doing this info"

       -Demonstration at Program Director's workshop summer 2011

       -Meet with all academic college representatives summer 2011

       -Meet with all program staff representatives summer 2011

       -Focus group with program directors fall 2011

Spring 2012

       -Meet with each program to go over requirements-Ongoing throughout the project

       -Focus group with students regarding look/functionality of GPS-April/May 2012

       -Website content to go live 2/15 for staff

       -Communication to go out internally to all audiences pointing to website 2/15

       -Website content to go live for students 3/1

       -Communication out to current students pointing to website 3/1

After spring break

-Communicate to students (all email accounts) about changes with screen shots/link to training
-Communicate to faculty about changes with training document attached

June

       -Training for faculty and staff (offer 5 training sessions)

July

-Use August as a test case for some students that are graduating. Exceptions keyed in both places. Communicate this to college staff. Two focus groups.
-Communication late July that in December all students will graduate with new GPS.

August

       -Use August fully live graduation

       - Communication to all faculty, staff and students.

January 2013

        -Communicate to all incoming students about the GPS for degree progress tracking

            -Continue this communication each term.

This communication plan allowed us to reach multiple audiences in multiple ways. Since the college staff were already using the new system, they were also spreading the word to the students in their College and bringing up the GPS to demonstrate the functionality to students. This "word of mouth" method directly targeted students, which also helped to spread the word.

<u>Training</u>

With input from the advisors, training was developed for the GPS using both Power Point and video. Training was created for both students and staff. Face to face training sessions demonstrated the functionality of each section of the GPS thoroughly and allowed students and staff to view a GPS on the computer. Two focus groups were also held. Students and staff could both attend. They were encouraged to review their personal GPS or the GPS of students in their program. This process was very successful. Attendees asked questions, found mistakes needed to be fixed, and offered functionality suggestions for the future. Attendees were able to ask individual questions and review the new GPS at their pace. Figure 20 shows the content that was placed on the College of Graduate Studies website for training materials.

When Brown University was transitioning to a new library search system, they involved end users. During their rounds of testing with mostly undergraduate students they had many responses that said the search system "doesn't give me what I want; even when I am using quotes I don't get what I want," (Bordac & Rainwater, 2008, p. 126).   This example also demonstrates how important user-centered design and input is at every aspect of an implementation.

Graduate Plan of Study (GPS)

GPS, the Graduate Plan of Study tool, is an automated degree audit system that serves to empower students and enable college administrators to plan for and track a student's academic progress. Certain features allow a student to test "What If" scenarios by accessing the academic impact of certain course choices or future track changes.

What does GPS feature?

- Real-Time updates and 24-hour access to a student's Plan of Study

- The ability to view transfer credit, review completed courses and monitor in-progress coursework

- The ability to access the number of courses or other program requirements needed to complete your degree

- The ability to simulate "WHAT IF" scenarios and determine the impact of course changes, should you decide to make changes to your program

- The ability to display progress in non-course requirements

- Allows for class enrollment directly from the Interactive Report

- Easy to identify outstanding courses needed to graduate

- Below are training resources to assist in using your GPS. All questions should be directed to gps@ucf.edu.

Training Guides

How to Process Your Interactive GPS Report

How to Read Your Interactive GPS Report

How to Read Your PDF Report

How to Process Your WHIF (What If) Report

GPS Browser Support Guide

Video Tutorials

How to Process an Interactive GPS Report - Student

How to Process an Interactive GPS Report - Staff

How to Process an Interactive GPS Report - Faculty

How to Process a WHIF Report - Student

How to Process a WHIF Report - Staff

How to Process a Batch Report

Figure 20: Sample website content

CHAPTER 4: EVALUATION AND SUMMARY

Evaluation

After one year of using the GPS, we asked each of the eleven college staff members five questions regarding the implementation of and usefulness of the GPS. The questions were distributed to the college staff by paper at a regularly held meeting or by email for those that had left their positions. Out of eleven college staff members, I received eleven evaluations. The evaluation forms do not indicate the College or staff member that answered the questions so I am unaware of how each member responded. Below is a list of tables indicating the answers from each College representative.

Question 1: When you first heard that the Graduate College would be changing from the DARS to the PeopleSoft Advising Report, what was your reaction?

Table 2: Responses to evaluation question number 1.

Person 1	My general reaction was positive with some concern for what types of issues/confusion would arise from running two audit systems between graduate and undergraduate.
Person 2	Skeptical. Having worked with SASS (the original advisement system) and DARS, I was not optimistic. Additionally, I felt that PeopleSoft had too many layers to drill down through to access information and wondered if we would be left with a new version of the 2 previous cumbersome systems from the past.
Person 3	I was extremely grateful that DARS was going away. We had one person in the office that could actually use it, and waiting for the various updates made both of us and the students anxious This was very stressful during graduation certification.
Person 4	I groaned thinking that we didn't need to fix the audit system again. I thought the time and money investment might be used for other areas needing improvement, like more graduate resources and staff. I knew the univ wanted to move in this

	direction and so was interested in seeing the outcome.
Person 5	I was looking forward to eliminating the information upload issues between the 2 systems. However, I was anxious about the compliance issue in the transition.
Person 6	I was excited that I would not have to learn how to program DARS because I was fairly new to my position. I was also overwhelmed knowing that it would be difficult to get some of my program to do something new.
Person 7	Surprise, concern, anxiety. Extreme concern that I would be required to do more work or put more on my already full plate.
Person 8	When I came on board the GPA module was one step away from production.
Person 9	Thank God! DARS was an improvement over SASS-and the advisement module is light-years improvement.
Person 10	Excited for change. Upgraded system was needed.
Person 11	Excitement, the DARS system was not user friendly, or functional for the academic programs.

Overall, there was a mixture of anxiety and excitement when the college staff were presented with the change in systems. Some of the staff had been through poorly implemented system implementations and therefore, dreaded going through another one that claimed to have so much more functionality, which was met with little confidence.

Question 2: Do you think that your input was considered when creating the new advisement

report and the components that would be a part of it?

Table 3: Responses to evaluation question number 2.

Person 1	Yes
Person 2	Definitely. Graduate Studies was very engaging and actively solicited input, and used the input in the development process.
Person 3	Yes, Graduate Studies held various information meetings with us where modules of the new PS system were demonstrated and explained. We were asked for our input and given hands-on demos. Our input was definitely considered and used in the final version.
Person 4	Yes, I think all of the Colleges were consulted and given ample opportunity to make suggestions. Our suggestions were also heard and implemented which allows us to work well in the system.
Person 5	It was considered once we were in demo mode, which helped lessen my anxiety.
Person 6	My input was considered but not everything was possible due to programming limitations.
Person 7	Very little. It seems that the report was 90% by the time we were notified. I think we added in some input which was implemented/considered.
Person 8	GPS is flexible. ..changes have been made since initial implementation. Our input is considered, updates have been requested.
Person 9	Absolutely, I am positive that my contributions were seriously considered and where applicable-were implemented.
Person 10	Yes, we were given an opportunity to give input at meetings.
Person 11	Yes, I believe all academic programs were included heavily in the discussion for development of the module. Frequent meetings were held as well by CGS to give updates on the progress of the project.

In regards to question number 2, most respondents indicated that they had input and, it

was added to the system where applicable and possible. Staff also seemed to specify that they

were given frequent updates on progress and demos as possible.

51

Question 3: Are you satisfied with the amount of input you had in creating the report?

Table 4: Responses to evaluation question number 3.

Person 1	Yes
Person 2	Definitely. It was very interactive, open dialogue where genuine listening took place on the part of Graduate Studies.
Person 3	Yes, very satisfied.
Person 4	We had regular meetings and email exchanges with Graduate Studies and the consultants, all of whom asked good questions about our needs and wants.
Person 5	It was fine, the transition was difficult and many of the milestones and exceptions were not moved over as promised.
Person 6	All of my suggestions were taken into consideration and done, if possible.
Person 7	Even though most of it was complete by the time I was told, I was actually ok with the end result. I was concerned at first but everything worked out.
Person 8	Yes, with changes made since initial implementation. Usually requests are college initiated and GPS tech people respond right away.
Person 9	Yes, I felt like I contributed to a tool that I use all the time.
Person 10	Yes
Person 11	Yes, I believe each program was given major consideration when developing the module.

Overall, most staff members believed and felt as if they had input into the new system and that the functionality that they needed was heard, considered and in many cases implemented.

Question 4: Are you satisfied with how the Interactive and PDF reports are working?

Table 5: Responses to evaluation question number 4.

Person 1	The interactive reports work well. The formatting of the PDF reports could be better. For example, with just a few minor adjustments to the box widths and blank lines, the length of the reports could probably be reduced by one page each.
Person 2	Yes, as I already stated, having worked on the two previous advisement systems, the PeopleSoft Advisement Report is like night and day compared to its predecessors. My only complaint is that the reports can't fit on fewer pages; however, I know this issue was addressed in many ways in the development process and I believe that Graduate Studies did the best they could given the system constraints.
Person 3	Yes, it is so user-friendly and fast. The updates from Graduate Studies are made very quickly. New features continue to be added and are all easy to use.
Person 4	Yes, it's been a challenge at times moving from a paper model into the interactive model but the functionality is there and time and paper are being saved.
Person 5	I am mostly satisfied but there are still missing requirements and incorrect requirements since we no longer build the requirements lines.
Person 6	Yes, but the PDF version shows a lot of unneeded information.
Person 7	Yes, I think it is wonderful and less glitches than the DARS system. Also, since I don't do exceptions anymore it has actually freed up time. My program and students love the interactivity of the report. It certainly saves time when doing certification since I'm only using one system.
Person 8	Yes, Interactive is very useful. PDF reports reduce the amount of paper utilized in record keeping.
Person 9	Yes, At this time it meets all my needs.
Person 10	Systems is slow otherwise ok
Person 11	The reports made advisement and certifying graduation more smoothly than previously working with DARS.

Most staff members are satisfied with the way the reports work. There are a few suggestions to shorten the length of the PDF and that the PDF is slow to pull up. We will try to work on these. Otherwise, comments and feedback are positive and the reports are working to meet everyone's need to advise and certify degrees.

Question 5: What additional functionality would you like to see added to the Advisement Module that would further improve your job function?

Table 6: Responses to evaluation question number 5.

Person 1	It is sometimes confusing when all courses are listed in a requirement area without notes about substitutions or replacements.
Person 2	Faster load times for the printer friendly version, but since it is pulling real time data, that may not be possible. Other than that, I am very satisfied with the Advisement Module and am even happier that I no longer have to create and update requirements. Thanks Tracy! Great job!!
Person 3	I can't think of any. This system has made out jobs much easier!
Person 4	I'd like to see Advisor Comments with different functionality. Currently working on improvements to FTCE score reporting.
Person 5	Getting the advisor line to work would be very helpful.
Person 6	Maybe more "what if" GPS possibilities on the student side of things.
Person 7	Maybe integration of a GPA calculator for students. Putting their stat on the report (restricted, conditional)
Person 8	I would like for blocks to not satisfy with future enrollment
Person 9	The only wish that I have is an electronic certification.
Person 10	N/A
Person 11	None.

I consistently see in the responses that the PDF is slow to pull up so this will need to be examined. There are a few other suggestions, which will be researched with computer services to determine the feasibility of adding the functionality. Overall, however, most staff are very positive and report that aspects of the new system have saved them time and work.

Summary of Responses

In the beginning, it seems that there were very mixed feelings among the group when it came to moving to yet another advising system. Some were very hesitant based on their past experiences. Others were so frustrated with the current system, that they were curious and interested about moving to a new system.

The staff agreed that they had input into the new system that they now use on a daily basis. Having input into the design of a system that they would use was critical to the success of the project. They could see that their input was reflected in the system functionality. They were able to test it to make sure it was what they needed and worked as they expected.

All deliverables and expected additional functionality were completed and added to specification. At this point, there are a few minor aspects to review and see if there is time and ability to make minimal changes. If the changes will make a significant impact in the daily work on the college staff then, it will be worth the time and effort. So we will do more research on these items and make a decision on the feasibility of making the suggested changes.

CHAPTER 5: RECOMMENDATIONS AND CONCLUSION

Recommendations

The purpose of this paper was to document a known advising and graduation problem for the eleven college staff members who used an antiquated system to advise graduate students and certify them for graduation. This paper also demonstrates what methods we found that other universities of a large size used as solutions to their same problem. Then there was discussion on the design and development of what would become the new functionality to solve our problem. I also laid out our testing protocol of both the delivered functionality and the functionality added by UCF Computer Services. The implementation plan to the staff, faculty and students was reviewed. Finally, I provided a short survey completed by the power users of the system (college staff).

Overall, the college staff were very pleased with the new system.   It was mentioned in the survey that the GPS has saved time, work and paper. Using User-Centered Designed approach, I feel like I have successfully, along with a core end user team, solved the advising issues that the college staff previously experienced using the antiquated system.

The next step at the graduate level is to train program staff to read and use the GPS to advise students that need more specific advising in the field of study. Another step would be to apply the User Design Process again to assist with providing a mechanism to automate the degree awarding process.   Some functionality does exist within PeopleSoft. However, we would want to expand that functionality so that paper will not have to be passed around. The users would want electronic signature sign off that students' have met their requirements. Then users would want the GPS that shows that the student has met their requirements to graduate to automatically be imported into an image system. It is expected that the development for this will

take about four months and can be implemented after about three weeks of user testing. Printing and routing of paper will cease at this point, since approvals will be completed by simply checking a box. The names of those checking the box will be captured and displayed on the GPS that is stored in the image system.

After the implementation of the GPS for the graduate students, I was asked to provide several demonstrations of the system to other groups on campus. After reporting personnel, auditors, other advisors, the Registrar and financial aid personnel saw the potential use and improvements for their work, they convinced the Provost and others that this needed to be implemented at the undergraduate level.

About one year later, the Office of Undergraduate Studies was informed that they would be implementing the Academic Advisement Module for undergraduate students. This project is currently underway. The student population is much larger, around 52,000 students and there are added complexities outside of the system that will cause this to be a 3-4 year project. I can see that some input is sought from end-users but overall, it seems to be a core group of key users in administrative offices making the majority of the functionality decisions.

If I Could Do It Over

With any implementation, there are usually several decisions that you wish you had gone about differently. While the computer services department agreed to the modifications that group put forward in the beginning, more modifications were needed. The list that was compiled by the users was made in the very beginning. As we delved more into the project we learned that other changes were needed. Next time, I would have a computer services programmer at each meeting so that they understood what obstacles the advisors were running into. This would have aided in having computer services programmers be more open to the new changes. I would also

have the users and computer services do testing together. There was a lot of passing of

modifications back and forth from development t user test and back. To save time, they should

have done the testing in the same room so the developer could see the errors the users were

running into. Another thing I would have done differently would have been to hold computer

services development to the agreed upon deadlines. Many deadlines were delivered late which

caused the user testing to be rushed. I would have also involved a member of the Registrar's

office. Some data regarding the external and internal catalogs were incorrect. Not having

attended the project meetings, members of the Registrar's office did not understand how their

data effected the proper functioning of the GPS. With regard to User-Centered Design, I would

have liked to have more focus groups with staff and students. This proved to be the most helpful

in uncovering unique situations that were not thought about during development but the issues

needed to be corrected.

Conclusions

After seeing an advising problem, I pulled together a core team of advisors from across

colleges and disciplines. We explored systems at other universities and learned the pros and

cons of their functionality. We brought in a consultant to teach us the functionality of the

PeopleSoft system and decided with a few modifications, approved by UCF Computer Services,

that this could resolve many advising mistakes and improve the overall advising and graduation

certification process.

Using User-Centered Design principles, the core team continued to meet throughout the

process to outline and design the system according to their needs. As Computer Services

completed modifications, the team tested them for accuracy. As degree requirements were built,

the team tested those for accuracy using real student scenarios.   The team met bi-weekly and

sometimes weekly to review new information or functionality. As we came closer to having conversion and testing completed, we started a wider spread communication plan to the larger university community. We also held focus groups and training sessions in order for users to be ready when the system went live in the spring term of 2013.

According to the survey completed by college staff, they are happy with the input they had in developing the system and they continue to be happy with the functionality. I consider this project a great success. It brought the College of Graduate Studies staff and the Academic college staff members closer together and created an ongoing and amicable communication path.

User-Centered Design is not used in many implementation projects. Often the end-users must learn and use the system delivered to them. Rarely, do they have an opportunity to be a part of the development of the system they will be using in their everyday work. "Going through the steps of the design process helped me to see that the successful innovations come from the ideas of the many end users across disciplines" (R. McCormick, personal interview, October 12, 2014).

When the undergraduate student population goes live on the Academic Advisement Module, the entire university will be using one tool and this in itself; will add great benefits to many offices around the university.

It is hoped that UCF and other universities will benefit from this document when they implement a significant project. There are many methods used in the implementation of university-wide projects. The User-Centered Design method was a very successful method for UCF College of Graduate Studies. I hope that other units on campus or other universities will find the information in this document both intriguing and useful as they move forward to implement new technology.

APPENDIX A: IRB APPROVAL FROM

UNIVERSITY OF CENTRAL FLORIDA

University of Central Florida Institutional Review Board
Office of Research & Commercialization
12201 Research Parkway, Suite 501
Orlando, Florida 32826-3246
Telephone: 407-823-2901 or 407-882-2276
www.research.ucf.edu/compliance/irb.html

Approval of Exempt Human Research

From: **UCF Institutional Review Board #1**
         FWA00000351, IRB00001138

To: **Tracy R. Jones**

Date: **November 22, 2014**

Dear Researcher:

On 11/22/2014, the IRB approved the following activity as human participant research that is exempt from regulation:

Type of Review:	Exempt Determination
Project Title:	Academic Advisement Module Implementation: A Case Study
Investigator:	Tracy R Jones
IRB Number:	SBE-14-10789
Funding Agency:	
Grant Title:	
Research ID:	N/A

This determination applies only to the activities described in the IRB submission and does not apply should any changes be made. If changes are made and there are questions about whether these changes affect the exempt status of the human research, please contact the IRB. When you have completed your research, please submit a Study Closure request in iRIS so that IRB records will be accurate.

In the conduct of this research, you are responsible to follow the requirements of the Investigator Manual.

On behalf of Sophia Dziegielewski, Ph.D., L.C.S.W., UCF IRB Chair, this letter is signed by:

Joanne Muratori

Signature applied by Joanne Muratori on 11/22/2014 12:59:16 PM EST

IRB Coordinator

Page 1 of 1

APPENDIX B: INFORMED CONSENT

University of Central Florida

Academic Advisement Module Implementation: A Case Study

Informed Consent

Principal Investigator: Tracy Jones, Ed.D Candidate

Faculty Advisor: David Boote, Ph.D.

Introduction: Researchers at the University of Central Florida (UCF) study many topics. To do this we need the help of people who agree to take part in a research study. You are being invited to take part in a research study which will include about 11 people at UCF.   You have been asked to take part in this research study because you had input into the development of the Advisement Module project. You must be 18 years of age or older to be included in the research study. The person doing this research is Tracy Jones of UCF College of Graduate Studies and doctoral candidate in the College of Education and Human Performance. Because the researcher is a graduate student, she is being guided by Dr. David Boote, a UCF faculty advisor in the School of Teaching, Learning and Leadership.

What you should know about a research study:
- Someone will explain this research study to you.
- A research study is something you volunteer for.
- Whether or not you take part is up to you.
- You should take part in this study only because you want to.
- You can choose not to take part in the research study.
- You can agree to take part now and later change your mind.
- Whatever you decide it will not be held against you.
- Feel free to ask all the questions you want before you decide.

Purpose of the research study: The purpose of this study is to evaluate the functionality and usability of the new Advisement Module and determine the amount of input you feel you had into the end product.

What you will be asked to do in the study:
You will each be asked to complete a short, 5 questions survey. You do not have to participate. You do not need to answer every question.

Location: Participants will meet in the College of Science Building, room 221 as part of a regularly scheduled graduation meeting.

Time required: We expect that you will be in this research study one time for 15 minutes.

Risks: There are no reasonably foreseeable risks or discomforts involved in taking part in this study.

Benefits: There are no expected benefits to you for taking part in this study.

Compensation or payment: There is no compensation or other payment to you for taking part in this study.

Study contact for questions about the study or to report a problem: If you have questions, concerns, or complaints, or think the research has hurt you, talk to Tracy Jones, Graduate Student, Ed.D. Program, College of Education and Human Performance, (407) 823-5815 or Dr. David Boote, Faculty Supervisor, Department of Teaching, Learning and Leadership at (407) 823-4160 or by email at David.Boote@ucf.edu

IRB contact about your rights in the study or to report a complaint: Research at the University of Central Florida involving human participants is carried out under the oversight of the Institutional Review Board (UCF IRB). This research has been reviewed and approved by the IRB. For information about the rights of people who take part in research, please contact: Institutional Review Board, University of Central Florida, Office of Research & Commercialization, 12201 Research Parkway, Suite 501, Orlando, FL 32826-3246 or by telephone at (407) 823-2901. You may also talk to them for any of the following:
- Your questions, concerns, or complaints are not being answered by the research team.
- You cannot reach the research team.
- You want to talk to someone besides the research team.
- You want to get information or provide input about this research.

APPENDIX C: TEST STANDARDS

In order to make updating/correcting errors easier and streamlined, here are a few testing standards to follow:

1. **Requirement Group, Requirement and Line Item Detail**
   When running a GWHIF/GADV report and you discover an error, keep a good record of the location where the problem is occurring. There are various codes within the report that assist us to quickly trouble shoot and correct the issue. Most Errors will be at the RQ level and have a specific line number.

   For example: *If you notice that PSYC 391 is really supposed to be PSYC 349 in this course list, in your notes for this program, you will refer to RQ 2017, LN10.to identify the course list that needs to be corrected.*

   SOCIAL SCIENCES (RQ 2017, LN 10)
   Not Satisfied: Social Sciences

   · **Units:** 6.00 required, 3.00 used, 3.00 needed

   Courses Used

Term	Subject	Catalog Nbr	Course Title	Grade	Units	Type
2007 Fall	SOCI	2XX	Sociology Option	TB	3.00	TR

   Courses Available

   ALL ANTH COURSES, ALL ECON COURSES, ALL POLS COURSES, ALL SOCI COURSES, PSYC 105, PSYC 223, PSYC 233, PSYC 241, PSYC 301, PSYC 306, PSYC 307, PSYC 324, PSYC 326, PSYC 328, PSYC 333, PSYC 337, PSYC 339, PSYC 341, PSYC 355, PSYC 391, PSYC 400, PSYC 405, PSYC 423, PSYC 428, PSYC 431, PSYC 435, PSYC 437, PSYC 438, PSYC 449, PSYC 456, PSYC 495, PSYC 498

   *NOTE: You also want to take note of the catalog year of the student you are running. This has great impact on where you will be making the change. Many programs have requirement changes at different catalog year levels; you don't want to mistakenly change the incorrect year.

2. **Locate error in Setup**
   Once you determine where the incorrect data is using the codes from the report, you can easily locate the area that needs correcting. Make a note of the change for the person building or if you feel comfortable, make the change yourself. Always keep note of the change you made and if so, add your initials to that row indicating that you were the last person to make a change to that specific requirement. Have someone double check your correction for accuracy if needed.

3. **Number of Test students tested (10 minimum)**
   You can keep this in a format that works best for you. However, the best practice is to keep a sheet of programs tested along with the student IDs and notes for that student. This way you will have easy access to a scenario you might need additional help with. Since testing is such vital part of implementation, it's suggested that you test at least 20 random students within each program. This will ensure you have tested multiple situations, catalog years and course load and that all programs are set up to work for the majority.

	A	B	C
1	**Student ID**	**Notes**	**Catalog Year**
2	0255666	GADV & GWHIF-OK areas being met. Able to satisfy	FALL 2010
3	2676710	GADV & GWHIF-OK areas being met. Able to satisfy- 2004 course doesn't fall into area	SPRING 2011
4	2161037	GADV & GWHIF- OK areas being met. Able to satisfy	SPRING 2010
5	0266265	GADV & GWHIF-OK areas being met. Able to satisfy	FALL 2010
6	2986267	GADV & GWHIF-OK areas being met. Able to satisfy	FALL 2010
7	1743349		
8	1756699	GADV & GWHIF-OK areas being met. Able to satisfy	FALL 2010
9	2999200		
10	2974981		

APPENDIX D: GPS INTERACTIVE REPORT

Graduate Plan of Study (GPS)

University of Central Florida | Graduate

This report last generated on 11/19/2014 12:51PM

Help and Tutorial

ACADEMIC PROGRAM AND ADVISOR	
Civil Engineering PhD	**Advisor Name**

Funded Student: Yes   **International:** F-1
Earliest Admit Term: Spring 2013   **Catalog Year/Term:** Spring 2013
  Current Status: Regular Admission Status
Intent to Graduate on File: No
Masters Along the Way: No

collapse all	expand all	printer friendly

GRADUATE DISCLAIMER

The Graduate Plan of Study (GPS) is intended to be a road map for your graduate program. It is for advisement only and not an irrevocable contract between the student and UCF. All internal and external transfer credit reflected in your report requires program approval. Course offerings are not always guaranteed. This report also assumes successful completion of all requirements marked as IN PROGRESS (IP). Final degree confirmation is subject to program and Graduate College approval.

⬆ External Transfer Work   ✅ Taken   ◆ In Progress

All Requirements Met: Not Satisfied
Graduate Status GPA: Satisfied (3.714)

▶ **GRADUATE DOCTORAL POLICIES (RG3857)**

🔻 **CIVIL ENGINEERING PHD- 72 CREDIT HOURS (RG4126)**

Not Satisfied: Civil Engineering PhD

CIVIL ENGINEERING PHD REQUIREMENTS (RQ1441)

Not Satisfied: Civil Engineering PhD Requriements

▷ **REQUIRED COURSES (RQ1441;LN10)**

🔻 **DISSERTATION (RQ1441;LN20)**

Not Satisfied: Dissertation

- Units: 18.00 required, 0.00 taken, 18.00 needed

The following courses may be used to satisfy this requirement:				
Course	Description	When	Grade	Status
***7980	DISSERTATION			

View All | 🗗   First ◀ 1 of 1 ▶ Last

🔻 **GRADUATE POLICY: 50% @ THE 6000/7000 LEVEL (RQ1441;LN30)**

Not Satisfied: At least half of the credit hours used to meet program requirements must be at the 6000/7000 level.

- Units: 36.00 required, 18.00 taken, 18.00 needed

The following courses were used to satisfy this requirement:					
Course	Description	Units	When	Grade	Status
CWR6102	ADVANCED HYDROLOGY	3.00	Spring 2014	A	✅
CWR7919	DOCTORAL RESEARCH	6.00	Summer 2013	S	✅
CWR6938	SPECIAL TOPICS (ST:WATER POLICY PLAN & GOV)	3.00	Spring 2013	B+	✅
CWR7919	DOCTORAL RESEARCH	3.00	Spring 2013	A	✅

▷ GRADUATE POLICY: FORMAL COURSEWORK (RQ1441;LN40)

▷ PROGRAM OF STUDY GPA (RQ1441;LN50)

▷ OTHER COURSES (RQ1441;LN60)

GRADUATE MILESTONES: DOCTORAL (RQ1054)

Not Satisfied: Graduate Milestones: Doctoral

▽ CANDIDACY EXAM (RQ1054;LN10)

    Not Satisfied: Candidacy Exam

▽ FORMAT REVIEW (RQ1054;LN20)

    Not Satisfied: Format Review

▽ DEFENSE (RQ1054;LN30)

    Not Satisfied: Defense

▽ DISSERTATION TITLE (RQ1054;LN40)

    Not Satisfied: Dissertation Title

▽ FINAL SUBMISSION OF DISSERTATION (RQ1054;LN50)

    Not Satisfied: Final Submission of Dissertation

▶ **UNIVERSITY REQUIREMENTS**

▶ **PROGRAM SPECIFIC REQUIREMENTS**

▼ **GRADUATE COURSE HISTORY**

Term	Subject	Catalog Nbr	Title	Grade	Units	Status
Fall 2010	AAA	5000	WATERSHED HYDROLOGY	S	3.00	⬆
Fall 2010	AAA	5001	HYRRODYNAMICS	S	3.00	⬆
Fall 2010	AAA	5002	WATER RESOURCES SYSTEMS	S	3.00	⬆
Fall 2010	AAA	5003	CONCEPTS IN WATER MODELINE	S	1.00	⬆
Fall 2010	AAA	5004	WATER SUPPLY AND SANITATION	S	3.00	⬆
Fall 2011	AAA	5005	URBAN DRAINAGE MANAGEMENT	S	3.00	⬆
Fall 2011	AAA	5006	INTEGRATED WATER RES. MANAGEME	S	3.00	⬆
Fall 2011	AAA	5008	RES. DESIGN & EXPERIMENTAL MET	S	2.00	⬆
Fall 2011	AAA	5009	CLIMATE CHANGE & WATER RESOURC	S	3.00	⬆
Fall 2011	CWR	6535	MODELING OF WATER RES. SYSTEMS	S	3.00	⬆
Spring 2013	CWR	5545	WATER RESOURCES ENGINEERING	B-	3.00	✔
Spring 2013	CWR	6938	SPECIAL TOPICS (ST:WATER POLICY PLAN & GOV)	B+	3.00	✔
Spring 2013	CWR	7919	DOCTORAL RESEARCH	A	3.00	✔
Summer 2013	CWR	7919	DOCTORAL RESEARCH	S	6.00	✔
Fall 2013	CWR	5205	HYDRAULIC ENGINEERING	A	3.00	✔
Fall 2013	CWR	5634	WATER RES IN CHANGING ENVT	A	3.00	✔
Fall 2013	CWR	7919	DOCTORAL RESEARCH	S	3.00	✔
Spring 2014	CWR	5515	NUMERICAL METHODS IN CEE	A	3.00	✔
Spring 2014	CWR	6102	ADVANCED HYDROLOGY	A	3.00	✔
Spring 2014	CWR	7919	DOCTORAL RESEARCH	S	3.00	✔
Summer 2014	CWR	7919	DOCTORAL RESEARCH	S	6.00	✔
Fall 2014	CWR	7919	DOCTORAL RESEARCH		9.00	◆

Total Number of Units = 75

Return to Report Request

APPENDIX E: GPS PRINTER FRIENDLY

UCF
NAME
ID: 1234567
Report Date: 12/02/2014

Program
Education EdD Program

Catalog Year/Term
Fall 2008

Admit Term: Fall 2008
Current Status: Intent to Graduate Withdrawn
Intent to Graduate on File: No
Masters Along the Way: No

GRADUATE DISCLAIMER

The Graduate Plan of Study (GPS) is intended to be a road map for your graduate program. It is for advisement only and not an irrevocable contract between the student and UCF. All internal and external transfer credit reflected in your report requires program approval. Course offerings are not always guaranteed. This report also assumes successful completion of all requirements marked as IN PROGRESS (IP). Final degree confirmation is subject to program and Graduate College approval.

LEGEND: IP(In Progress), TR(External Transfer Work), EN(Enrolled/Taken)

All Requirements Met: Not Satisfied
Graduate Status GPA: Satisfied (3.938)

GRADUATE DOCTORAL POLICIES (RG3857)

Graduate Doctoral Policies

GRADUATE DOCTORAL POLICIES (RQ1165)
Satisfied: This section describes policies applicable to all students enrolled in Doctoral programs

GRADUATE POLICY: 4000 LEVEL COURSES (RQ1165:LN10)

4000 level courses are not eligible for use in a Doctoral Graduate Plan of Study.

GRADUATE POLICY: NO I/N GRADES ALLOWED (RQ1165:LN20)

Satisfied: No I or N letter grades allowed in the Graduate Plan of Study.

GRADUATE POLICY: UNSATISFACTORY GRADES (RQ1165:LN30)

Satisfied: A degree-seeking student may use a maximum total of six semester credit hours or at most two classes, whichever is greater of C+, C, C- grades with advisor approval. Unsatisfactory grades of D+, D, D-, F, and U will only display in the Course History section since they are not eligible for use toward the degree.

GRADUATE POLICY: 7 YEAR PROGRAM LIMIT (RQ1165:LN40)

No course older than seven years at the time of graduation may be used in the Graduate Plan of Study.

Courses Taken

Term	Subject	Catalog Nbr	Course Title	Grade	Units	Type
Fall 1998	EDF	6481	FUNDAMENTALS OF GRAD RES ED	A	3.00	EN
Sprg 1999	EME	6705	ADM INSTR TECH	A	3.00	EN
Sprg 2000	EME	5057	COMM INST SYS APP	A	3.00	EN
Summ 2000	EME	6457	DE TECH PROC PROD	A	3.00	EN
Fall 2000	EME	5056	COMM INST SYS PRO	A	3.00	EN
Sprg 2001	EME	6946	INTERNSHIP	A	3.00	EN
Summ 2001	EME	6062	RESEARCH IN IT	A	3.00	EN
Summ 2001	EME	6613	INST SYSTEMS DES	A	3.00	EN
Fall 2001	EME	5054	INST TECH SURV AP	A	3.00	EN
Fall 2001	EME	6313	MEDIA SYSTEMS DES	A	3.00	EN
Sprg 2002	EME	5408	COMPUTER APPL IS	A	3.00	EN
Sprg 2002	EME	6053	CURRENT TRENDS IT	A	3.00	EN
Sprg 2002	EME	6909	RESEARCH REPORT	S	3.00	EN
Sprg 2006	EDA	7195	POL GOV FIN ED OR	A	4.00	EN
Summ 2006	EDA	6232	LEGAL ASP SCH OP	A	3.00	EN
Summ 2006	EDA	7192	ED LEADERSHIP	A	4.00	EN
Fall 2006	EDA	6939	SEM ED ADMIN	A	3.00	EN
Sprg 2007	EDA	7225	EDUC PERSONNEL	A	4.00	EN

EDUCATION EDD-54 CREDIT HOURS (RG4192)
Overall Requirement Not Satisfied: Education EdD

EDUCATION EDD REQUIREMENTS (RQ1512)
Overall Requirement Not Satisfied: Education EdD Requirements

REQUIRED COURSES (RQ1512:LN10)

Satisfied: Required Courses

- **Units:** 24.00 required, 24.00 taken

Courses Taken

Term	Subject	Catalog Nbr	Course Title	Grade	Units	Type
Fall 2008	IDS	7500	SEMINAR IN EDUC RESEARCH	A	3.00	EN
Sprg 2009	EDF	7916	Anal Synthesis of Educ Lit	A	3.00	EN
Summ 2009	IDS	7938	RESEARCH CLUSTER SEMINAR	A	3.00	EN
Fall 2009	EDG	6285	EVALUATION OF SCHOOL PROGRAMS	A	3.00	EN
Sprg 2010	EDF	6464	MIXED METHODS FOR EVALUATION	A	3.00	EN
Summ 2010	IDS	7938	RESEARCH CLUSTER SEMINAR	A-	3.00	EN
Fall 2010	IDS	7501	ISSUES & RESEARCH IN EDUC	A	3.00	EN
Sprg 2011	IDS	7502	CASE STUDIES IN RES DESIGN	A-	3.00	EN

OR SPECIALIZATION-ADVISOR APPROVED (RQ1512:LN60)

Satisfied: Students must meet with an advisor for approved electives.

- **Units:** 15.00 required, 18.00 taken

Courses Taken

Term	Subject	Catalog Nbr	Course Title	Grade	Units	Type
Sprg 2006	EDA	7195	POL GOV FIN ED OR	A	4.00	EN
Summ 2006	EDA	6232	LEGAL ASP SCH OP	A	3.00	EN
Summ 2006	EDA	7192	ED LEADERSHIP	A	4.00	EN
Fall 2006	EDA	6939	SEM ED ADMIN	A	3.00	EN
Sprg 2007	EDA	7225	EDUC PERSONNEL	A	4.00	EN

EDA 7225 has been directed to this line.
SUB EDA 6232, 6939, 7192, 7195, AND 7225 FOR SPECIALIZATION-ADVISOR APPROVED- SPEC2 (AO3640)

EDA 6939 has been directed to this line.
SUB EDA 6232, 6939, 7192, 7195, AND 7225 FOR SPECIALIZATION-ADVISOR APPROVED- SPEC2 (AO3640)

EDA 7195 has been directed to this line.

SUB EDA 6232, 6939, 7192, 7195, AND 7225 FOR SPECIALIZATION-ADVISOR APPROVED- SPEC2 (AO3640)

EDA 6232 has been directed to this line.
SUB EDA 6232, 6939, 7192, 7195, AND 7225 FOR SPECIALIZATION-ADVISOR APPROVED- SPEC2 (AO3640)

EDA 7192 has been directed to this line.
SUB EDA 6232, 6939, 7192, 7195, AND 7225 FOR SPECIALIZATION-ADVISOR APPROVED- SPEC2 (AO3640)

DISSERTATION (RQ1512:LN70)

Not Satisfied: Dissertation

- **Units:** 15.00 required, 12.00 taken, 3.00 needed

Courses Taken

Term	Subject	Catalog Nbr	Course Title	Grade	Units	Type
Fall 2011	EDG	7980	DISSERTATION	S	3.00	EN
Sprg 2012	EDG	7980	DISSERTATION	S	1.00	EN
Summ 2012	EDG	7980	DISSERTATION	S	1.00	EN
Fall 2012	EDG	7980	DISSERTATION	S	1.00	EN
Sprg 2013	EDG	7980	DISSERTATION	S	1.00	EN
Summ 2013	EDG	7980	DISSERTATION	S	1.00	EN
Fall 2013	EDG	7980	DISSERTATION	S	1.00	EN
Sprg 2014	EDG	7980	DISSERTATION	S	1.00	EN
Summ 2014	EDG	7980	DISSERTATION	S	1.00	EN
Fall 2014	EDG	7980	DISSERTATION		1.00	IP

Courses Available
DISSERTATION

GRADUATE POLICY: 50% @ THE 6000/7000 LEVEL (RQ1512:LN80)

Satisfied: At least half of the credit hours used to meet program requirements must be at the 6000/7000 level.

- **Units:** 27.00 required, 54.00 taken

Courses Taken

Term	Subject	Catalog Nbr	Course Title	Grade	Units	Type
Sprg 2006	EDA	7195	POL GOV FIN ED OR	A	4.00	EN
Summ 2006	EDA	6232	LEGAL ASP SCH OP	A	3.00	EN
Summ 2006	EDA	7192	ED LEADERSHIP	A	4.00	EN
Fall 2006	EDA	6939	SEM ED ADMIN	A	3.00	EN
Sprg 2007	EDA	7225	EDUC PERSONNEL	A	4.00	EN
Fall 2008	IDS	7500	SEMINAR IN EDUC RESEARCH	A	3.00	EN
Sprg 2009	EDF	7916	Anal Synthesis of Educ Lit	A	3.00	EN
Summ 2009	IDS	7938	RESEARCH CLUSTER SEMINAR	A	3.00	EN
Fall 2009	EDG	6285	EVALUATION OF SCHOOL PROGRAMS	A	3.00	EN
Sprg 2010	EDF	6464	MIXED METHODS FOR EVALUATION	A	3.00	EN
Summ 2010	IDS	7938	RESEARCH CLUSTER SEMINAR	A-	3.00	EN
Fall 2010	IDS	7501	ISSUES & RESEARCH IN EDUC	A	3.00	EN
Sprg 2011	IDS	7502	CASE STUDIES IN RES DESIGN	A-	3.00	EN
Fall 2011	EDG	7980	DISSERTATION	S	3.00	EN
Sprg 2012	EDG	7980	DISSERTATION	S	1.00	EN
Summ 2012	EDG	7980	DISSERTATION	S	1.00	EN
Fall 2012	EDG	7980	DISSERTATION	S	1.00	EN
Sprg 2013	EDG	7980	DISSERTATION	S	1.00	EN
Summ 2013	EDG	7980	DISSERTATION	S	1.00	EN
Fall 2013	EDG	7980	DISSERTATION	S	1.00	EN
Sprg 2014	EDG	7980	DISSERTATION	S	1.00	EN
Summ 2014	EDG	7980	DISSERTATION	S	1.00	EN
Fall 2014	EDG	7980	DISSERTATION		1.00	IP

GRADUATE MILESTONES: DOCTORAL (RQ1054)
Overall Requirement Not Satisfied: Graduate Milestones: Doctoral

CANDIDACY EXAM (RQ1054;LN10)

Satisfied: Candidacy Exam
Completed Date: 5/27/2011

Advisor:
Advisor:
Chair:
External Committee Member:

FORMAT REVIEW (RQ1054;LN20)

Not Satisfied: Format Review
Completed Date:

DEFENSE (RQ1054;LN30)

Not Satisfied: Defense
Completed Date:

DISSERTATION TITLE (RQ1054;LN40)

Not Satisfied: Dissertation Title
Completed Date:

Title:

FINAL SUBMISSION OF DISSERTATION (RQ1054;LN50)

Not Satisfied: Final Submission of Dissertation
Completed Date:

Program Specific Requirements

Item	Status	Status Date
Graduate Plan of Study	Complete	05/31/2011
Community Service Hours	Initiated	11/14/2011
Conference presentations	Initiated	11/14/2011
Portfolio	Initiated	04/28/2011
Professional Reading	Initiated	11/14/2011
Program Comprehensive Exam	Complete	05/27/2011
Specialization Exam	Complete	04/29/2011

Graduate Course History

Term	Subject	Catalog Nbr	Title	Grade	Units	Type
Fall 1996	SPN	1120	ELE SPANISH I	C	4.00	EN
Sprg 1998	EME	5408	COMPUTER APPL IT	W	3.00	EN
Summ 1998	EME	6613	INST SYSTEMS DES	W	3.00	EN
Fall 1998	EDF	6481	FUNDAMENTALS OF GRAD RES ED	A	3.00	EN
Sprg 1999	EME	6705	ADM INSTR TECH	A	3.00	EN
Summ 1999	EME	6507	MLTIMDIA IN CLASS	W	3.00	EN
Fall 1999	EME	5056	COMM INST SYS PRO	W	3.00	EN
Sprg 2000	EME	5057	COMM INST SYS APP	A	3.00	EN
Summ 2000	EME	6457	DE TECH PROC PROD	A	3.00	EN
Fall 2000	EME	5056	COMM INST SYS PRO	A	3.00	EN
Sprg 2001	EME	6946	INTERNSHIP	A	3.00	EN
Summ 2001	EME	6062	RESEARCH IN IT	A	3.00	EN
Summ 2001	EME	6613	INST SYSTEMS DES	A	3.00	EN
Fall 2001	EME	5054	INST TECH SURV AP	A	3.00	EN
Fall 2001	EME	6313	MEDIA SYSTEMS DES	A	3.00	EN
Sprg 2002	EME	5408	COMPUTER APPL IS	A	3.00	EN
Sprg 2002	EME	6053	CURRENT TRENDS IT	A	3.00	EN
Sprg 2002	EME	6909	RESEARCH REPORT	S	3.00	EN
Fall 2002	EDF	7463	SUR REC/QUAL DATA	W	3.00	EN
Fall 2002	EME	6207	MULT MED IN SYS 1	W	3.00	EN
Sprg 2004	EDA	6240	ED FINAN AFFAIRS	W	3.00	EN
Sprg 2004	EDA	6260	ED SYS PLAN/MGT	W	3.00	EN
Fall 2004	EDA	7101	ORG THEORY IN ED	W	3.00	EN
Fall 2004	EDA	7195	POL GOV FIN ED OR	W	4.00	EN
Sprg 2006	EDA	7195	POL GOV FIN ED OR	A	4.00	EN
Summ 2006	EDA	6232	LEGAL ASP SCH OP	A	3.00	EN
Summ 2006	EDA	7192	ED LEADERSHIP	A	4.00	EN
Fall 2006	EDA	6939	SEM ED ADMIN	A	3.00	EN
Sprg 2007	EDA	7225	EDUC PERSONNEL	A	4.00	EN
Summ 2007	EDA	7101	ORG THEORY IN EDUCATION	W	3.00	EN
Summ 2007	EDA	7205	PLAN RES & EVAL SYS EDUC ADMIN	W	3.00	EN
Fall 2007	CCJ	6021	CJ RESPONSES TO TERRORISM	W	3.00	EN
Fall 2007	EDA	6240	EDUCATIONAL FINANCIAL AFFAIRS	W	3.00	EN
Sprg 2008	CCJ	6335	CJ SENTENCE AND PUNISH POLICY	W	3.00	EN
Sprg 2008	EDH	6081	CONTEMPORARY PROBLEMS IN CCS	W	3.00	EN
Fall 2008	IDS	7500	SEMINAR IN EDUC RESEARCH	A	3.00	EN
Sprg 2009	EDF	7916	Anal Synthesis of Educ Lit	A	3.00	EN
Summ 2009	IDS	7938	RESEARCH CLUSTER SEMINAR	A	3.00	EN
Fall 2009	EDG	6285	EVALUATION OF SCHOOL PROGRAMS	A	3.00	EN
Sprg 2010	EDF	6464	MIXED METHODS FOR EVALUATION	A	3.00	EN
Summ 2010	IDS	7938	RESEARCH CLUSTER SEMINAR	A-	3.00	EN
Fall 2010	IDS	7501	ISSUES & RESEARCH IN EDUC	A	3.00	EN
Sprg 2011	IDS	7502	CASE STUDIES IN RES DESIGN	A-	3.00	EN
Fall 2011	EDG	7980	DISSERTATION	S	3.00	EN
Sprg 2012	EDG	7980	DISSERTATION	S	1.00	EN
Summ 2012	EDG	7980	DISSERTATION	S	1.00	EN
Fall 2012	EDG	7980	DISSERTATION	S	1.00	EN
Sprg 2013	EDG	7980	DISSERTATION	S	1.00	EN
Summ 2013	EDG	7980	DISSERTATION	S	1.00	EN
Fall 2013	EDG	7980	DISSERTATION	S	1.00	EN
Sprg 2014	EDG	7980	DISSERTATION	S	1.00	EN
Summ 2014	EDG	7980	DISSERTATION	S	1.00	EN
Fall 2014	EDG	7980	DISSERTATION		1.00	IP

Total Units: 97

APPENDIX F: FIT GAP DOCUMENT

Academic Advising

Fit/Gap Session
Based on PeopleBooks
9.0 Upgrade

Fit-Gap Findings
Modification Requirements
(will be ongoing document during
development process)

March-April 2011

Table of Contents

INSTALLATION TABLE: STUDENT ADMINISTRATION

(Set Up SACR> Install> Student Administration Installation)

      CONFIG: Installation Student Admin tab
      Select Academic Advisement radio button (This allows use of the interactive   audit via self service.)

      FIT/GAP SUMMARY: **FIT**

NOTES: If you select **NOT IN USE** radio button, the system display the "old static" degree audit via self service. Users can only select one mode via self service. We should select the **ACADEMIC ADVISEMENT** radio button, which allows the use of the interactive audit.

Advisement Report Types

(Set Up SACR>Product Related>Academic Advisement>Define Advisement Report)

In 9.0, Oracle split transcripts from degree audit transcripts. As a result, the interactive advisement reports are now referred to as **REPORTS**.

FIT/GAP SUMMARY: FIT

BUG/MOD: There is a current bug. The planned courses icon appears at the top of the Advisement Legend for the interactive audit, even when you don't select to include Planned Courses as an option on the report type.

RECOMMENDATION: Leave Maximum Reports to keep as 2 for each report type. This will allow the system to automatically purge/overwrite existing reports. Also note that different report types can have different maximum reports to keep. Currently DARS keeps reports for 30 days.

Academic Institution Page 7
(Set Up SACR>Foundation Tables>Academic Structure>Academic Institution Page 7)

FIT/GAP SUMMARY: FIT

NOTES: This is where we attach the Advisement Report Types we want to make available for student self service. The three report types that must be attached on this page for students to access the different reports are:

- *Advisement Report Type* (GADV)

80

o   ***Planner Report Type*** (GPLNR)- There was some discussion about not making the Planner Report Type available via self service because of the confusion that it would cause for students with all of the different report types. The solution would be not to include this as a planner type on the institution page for students.

o   ***What if Report Type*** (GWHIF)- For this report type we want to select include Planned Courses, What if Courses as well as In Progress Courses.
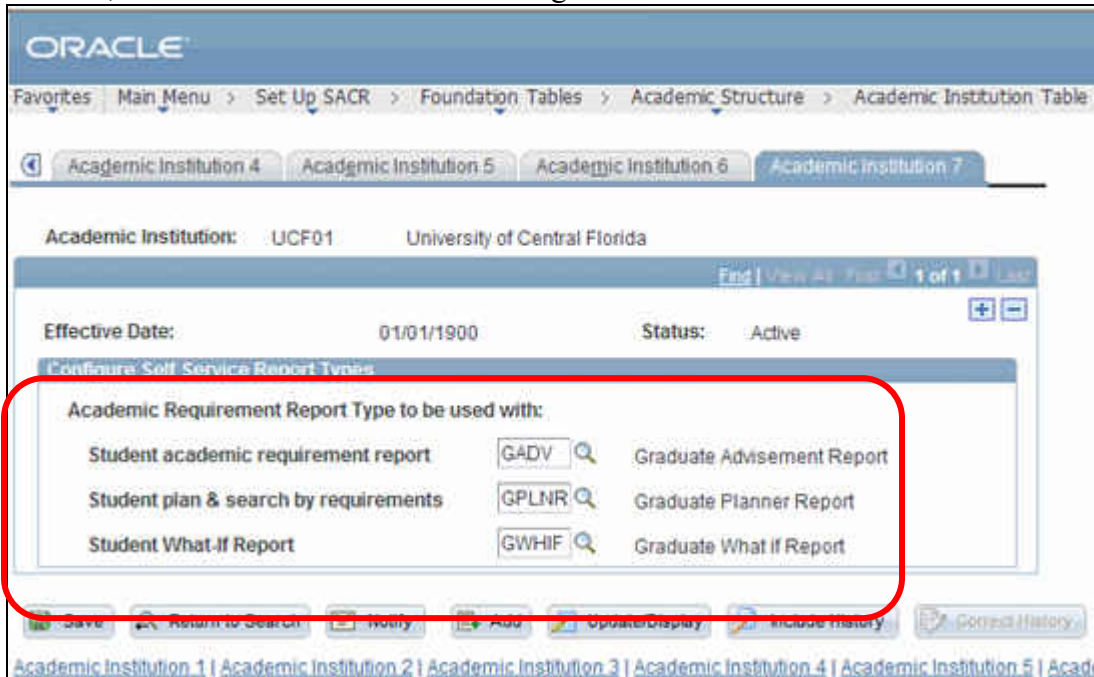
NOTE: If undergrad implements Academic Advisement, we will need to create generic report types that include both GRAD and UNDERGRAD careers for self service. Currently GRAD is the only career setup.

Valid Program Statuses for the report:

Select the program status values that are valid for the report type. Valid values are:

Active in Program - Select to include report results for students whose program status is Active in Program.

Program Status
Cancelled - Select to include report results for students whose program status is Cancelled.

Completed Program - Select to include report results for students whose program

status is Completed.

Deceased - Select to include report results for students whose program status is Deceased.

Discontinued - Select to include report results for students whose program status is Discontinued.

Dismissed - Select to include report results for students whose program status is Dismissed.

Leave of Absence - Select to include report results for students whose program status is Leave of Absence.

Suspended - Select to include report results for students whose program status is Suspended.

*UCF configured the following program statuses of ACTIVE because we didn't want to see Discontinued, Leave of Absence etc…

RECOMMENDATION: Identify other internal advising type of reports for DISC/DISM/LOA etc.

Academic Advisement Self Service Options

(Set Up SACR> Common Definitions>Self Service>Academic Advising)

CONFIG: Installation Student Administration (Use Academic Advisement)
Select Enable real-time processing
Select Enable the course what if option
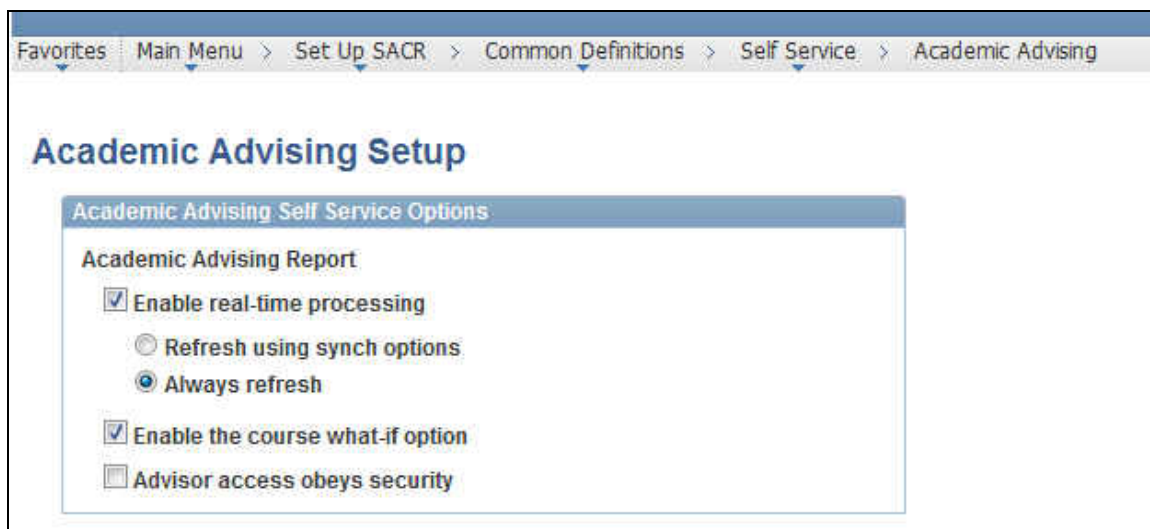
FIT/GAP SUMMARY: FIT – Use ALWAYS REFRESH OPTION

NOTES: (Get information on new functionality Advisor Access Obeys Security checkbox)

MOD: N/A

Academic Advising Installation

(Set Up SACR> Install>Academic Advisement Installation)

The new structure of Academic Advisement involves only processing new advisement reports via self service based on "triggers." The AA 9.0 triggers include:

Selecting a check box causes the system to set a synchronization (sync) flag for that change. In turn, the flag cues the institution to rerun the advisement report. Here are the actions for each check box that set a sync flag:

Enrollment Records	Adding, deleting, or modifying any enrollment records through Enrollment, Enrollment Requests, Quick Enrollment, or Grading.
Transfer Credit Records	Posting or unposting any transfer credit.
Internal Degree Records	Awarding, revoking, or modifying any degree record through the Student Program/Plan, Degree Maintenance, or Batch Graduation Processing pages.
External Degree Records	Adding, modifying, or removing any externally awarded degrees through the External Education pages.
Student Planner Records	Adding, modifying, or removing any records from the student's planner.
Academic Structure Records	Adding, modifying, or removing any values from the student's Records Program stack. This also includes admissions matriculation.
Student Group Record	Adding, modifying, or removing any advisement student group values for a student.
Academic Level Records	Making any changes to a student's academic level, either by automated processes from grading and enrollment or through manual override in term processing.
Milestone Records	Adding, modifying, or removing any milestone values for a student.
Shopping Cart Records	Adding, modifying, or removing any records in the student's Shopping Cart. Reprocessing when a student override is made.
Student Exception Records	Specifically, the flag is set when any of the following types of student-based exceptions are created: course directive, requirement change, waiver, or override. The flag is also set when there is any change made to such an exception, whether it is a change to the description or to the

override detail itself.

Reprocessing when a course substitution is made using the Create Course Substitution component (STDNT_CRS_SUBS).

Course Substitution Records

The flag is also set when there is any change made to the component, whether it is a change to the long description or to the substitution detail itself.

FIT/GAP SUMMARY: GAP- Because UCF constantly makes updates to the degree requirements and there is not a trigger to accommodate changes, this functionality is not option. UCF will use the REFRESH OPTION.

   MOD: N/A

Advising Student Groups

(Setup SACR>Product Related>Academic Advisement>Advising Student Groups)
In 9.0 there are now Advising Student groups that function as triggers for processing a new audit report via self service.

   FIT/GAP SUMMARY: FIT

NOTES: UCF decided that all student groups should appear in both the AA student groups and the existing student groups table. Student groups we setup are THESIS. (We are removing non thesis option that we prototyped.)

Default AA Grade for What-If

(Setup SACR>Foundation Table>Academic Structure>Grading Scheme Table)
The system allows you to enter a Default What-If Grade for each Grading Basis.

FIT/GAP SUMMARY: FIT, but doesn't apply to self service for students.　　　(See below)

NOTES: When an administrator does not enter a What-If grade, this default grade appears. Also this is used for behind the scenes repeat checking so that two courses that are the same don't appear in the audit.

Advisement Report Identifiers

(Academic Advisement>Academic Requirements>Define Report Identifiers)

Define report identifiers to be used to identify a set of requests to be created, processed, or purged.

FIT/GAP SUMMARY: FIT

NOTES: Report Identifiers group together like requests for generating or purging AA reports. Delivered values are ADMIN, BATCH, SSS (Student Self Service) Examples: of report identifiers could be user name or if you constantly run a particular job NEWADMITS, etc… We haven't identified additional Advisement Report Identifiers at this point in the project.

Entity Groups

(Academic Advisement>Academic Requirements>Define Entity Groups)

Groups together similar items, for example all certificates, for use to include or be excluded from a single condition, rule or requirement.

FIT/GAP SUMMARY: FIT

NOTES: This functionality is used when there is more than one plan, program or student group needed for a precondition. Precondition basically acts as a filter for that group that should receive a particular requirement. For example, we will use entity groups as a precondition when we are coding hours taken at UCF because it will change based on specific plans.

Advisement Reports

(Academic Advisement> Request Advisement Report)- Interactive Report
Academic Advisement>Student Advisement Report)- Static Degree Audit Report

Oracle delivers 3 Advisement reports in 9.0: the static degree audit, the on-line interactive audit and the PDF. Students will only have access to one "flavor"/type of report via self service.

All three have different information on them. (Static Degree Audit Reports, Interactive Audit, and the PDF.)

FIT/GAP SUMMARY: GAP

NOTES/DISCUSSION: Below are the differences with the interactive report vs. PDF and possible UCF modifications.

No.	Interactive Online Report	PDF Report	MOD Required	NOTES
1	No status column appears on the interactive audit	Status Column appears as incorrect (SATISFIED) when	X	Hide the status column on the interactive audit

		the student is in a plan that isn't configured in the system		
2	Course History does not appear	Course History appears at the bottom	No	As a work around we will create a "bucket" all other coursework- Will leave the existing bucket for transfer work on the interactive report and after testing will determine if it should remain
3	Course Directives appear as a link/note	Course Directives clearly appear on the PDF, with the exception of exclusions. (When a course is excluded, there isn't an indication of it being excluded.)	Possibly	There was some discussion about adding this to the interactive, but then we discussed that it might not need to look like the PDF.
4	Repeat Codes do not appear	Repeat Codes appear in the course history	Possibly	
5	PID appears in the header of the interactive report	PID does not appear in the header of the PDF	Possibly	Add PID to the header of the PDF report
6	Requirement Term doesn't appear in the header	Requirement Term appears for career, program, plan levels	Possibly	We can create a requirement that displays the catalog year via a requirement; however if there are additional mods being made to the header, the group discussed that this could be added as well.
7	Collapse ALL button appears on the interactive	Every requirement is expanded	X	Remove the Collapse all and include a button of: **VIEW PRINTER FRIENDLY VERSION**
8	No logo appears	Oracle logo appears	X	Add the UCF logo to the PDF report

9	Length of audit seems very long in many cases	Consolidate the number of pages on the PDF report	X	Consolidate the number of pages
10	Transfer articulation term does not appear in the interactive audit	Transfer articulation term appears in the course history portion of the PDF report-UCF is more concerned with the actual dates the course was taken- those manually entered	X	Hide the Articulation term from transfer work on the PDF in the course history
11	Planner icon appears in the legend even when displaying planner courses isn't selected on the report type	Planner icon appears as correct	X	Hide the planner icon in the legend from the GADV type on the interactive report
12	No tutorial link displayed	No tutorial link displayed	X	Add a link that goes to UCF site for help/tutorial
13	Additional UCF requirements not delivered	Additional UCF Requirements not delivered	X	Display academic standing, (Added document on adding student's Academic standing to Share Drive. Screen shots are from PS 8.0 however, we can still use set up, test it and see if it works of us.) earliest admit term, program action, program reason, test scores, GPA and All requirements met indicator
14	Advisor's name, to display the dates of the thesis and dissertation and title for that particular milestone on the PDF report and Interactive.			Need to add as a modification the Advisor's name, to display the dates of the thesis and dissertation and title for that particular milestone on the PDF report and

				Interactive.
15	Unable to show qualifying exams, ethics, and status etc..	Unable to show qualifying exams, ethics, and status etc..		Bring in Checklists to show qualifying exams, ethics training,etc
16	Delivered Batch Printing Reports is problematic because as delivered we can't split out certificates and graduate programs	Delivered Batch Printing Reports is problematic because as delivered we can't split out certificates and graduate programs	X	Modification need to split out reports when departments print (i.e. certificate from graduate program for students
17	Need students to be able to select the What-if term			

OTHER MODIFICATIONS NEEDED NOT RELATED TO PRINTED REPORT

NO	ISSUE	EXPLANATION	MOD REQUIRED	NOTES
1	Delivered Batch Printing Reports is problematic because as delivered we can't split out certificates and graduate programs	Delivered Batch Printing Reports is problematic because as delivered we can't split out certificates and graduate programs	X	Modification need to split out reports when departments print (i.e. certificate from graduate program for students
2	Self Service Need students to be able to select the what if term when running a what if		X	Simple mod of changing display to drop down
3	Repeat Checking to accommodate new policy of including average of the course in the GPA	This isn't problematic for the program GPA within the advisement report, but for the special GPA that should be brought into the audit	X	
4	7 Year Course Limit for courses that can be used in the audit	While there is a work around to address this, it is clunky and will require running scheduled series of	X	

		queries. The team will continue to spec out the best way to modify this. (See 7 Year Limit Doc-In Progress)		
5	Special GPA		X	Received information from UC Santa Cruz on a possible mod that can be done to support this addition

MOD:: See chart above.

What-If and Course List What-If Reports

(Set Up SACR> Common Definitions> Self Service>Academic Advisement)
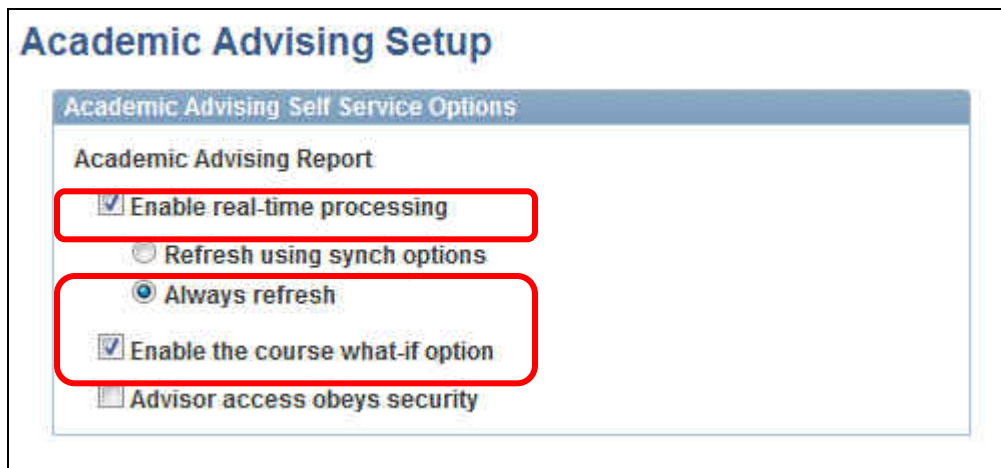
There is the option not to enable the course what if option for self service. UCF will release this functionality to students.

FIT/GAP SUMMARY: GAP for Course What if via Self Service

NOTES: Students can't enter Course What-if grades-only from the administrator pages. There was an Oracle case for this issue, but they came back with "works as designed."

MOD: Allow the students to select their requirement term. Currently there is just the default of the student's current catalog year via self service. But this is an existing case in PeopleSoft.

Academic Advisement Tables & Report Results Tables

The analysis database tables are still available in 9.0 because the static degree is still delivered in 9.0. These tables all start with **R_.** There are 23 analysis database tables that are still used for the static degree audit. There are 9 new report results tables. When running the interactive audit, results automatically run to the report results table (unlike the analysis database that has to be deliberately populated.)

CLST_MAIN_TBL
CLST_DETL_TBL
RQ_MAIN_TBL
RQ_LINE_TBL
RQ_LN_DETL_TBL
RQ_GRP_TBL
RQ_GRP_DETL_TBL
CRSE_SHARE_SET
RQ_GRP_SHR_SET
RQ_GRP_PLN_TBL
RQ_CONDITION
COND_PROC_TBL
RQ_COND_LINE
RQ_COND_LN_DETL

RQ_ENTITY_GROUP
RQ_ENT_GRP_DETL
SAA_RPT_TYP_TBL
SAA_RPT_CAR_TBL
SAA_IDENT_TBL

SAA_CND_TST_VW
SAA_CND_TST_VLN
SAA_CND_TST_TBL
SAA_CND_TST_DTL
SAA_CND_TSTEVW
SAA_CND_TSTAVLN
SAA_STDGR_HDR
SAA_STDGR_DETL
SA_TEST_CMP_TBL

SAA_SS_RPT_OPT
SAA_STDGR_DETL
INSTALLATION_AA

SAA_ADB_RESULTS
SAA_ADB_CONDUSE
SAA_ADB_CRSEAVL
SAA_ADB_CRSEUSE
SAA_ADB_COURSES
SAA_ADB_REPORT
SAA_ADB_PQDPLAN
SAA_ADB_WHATIF

Advisement Report Batch Processing

(Academic Advisement>Advisement Processes>Generate Report Requests)

Population Select and Update

FIT/GAP SUMMARY: **GAP** (Modification needed)

NOTES: For newly matriculated students, a batch process would need to be scheduled to run audits for students. As delivered this process sets the trigger functionality for students to access reports via self service. AA reports are not available for students and staff via self service until they have been run administratively or via running the batch process.

The batch process consists of these steps:

1.   Request advisement reports.

2.   Process the requests (that is, generate the reports).
3.   Print the reports in batch. Printing the reports generates results and creates a .PDF of the reports.

Pages Used to Process Batch & Print Advisement Reports

Page Name	Definition Name	Navigation	Usage
Generate Report Requests	SAA_RUNCTL_RPTRQST	Academic Advisement, Advisement Processes, Generate Report Requests	Define the report request.
Generate Advisement Reports	SAA_RC_RPTGEN	Academic Advisement, Advisement Process, Generate Advisement Reports	Define the run control parameters for the report.
Print Batch Reports	SAA_RC_RPTPRINT	Academic Advisement, Advisement Processes, Print Batch Reports	Define the printing parameters for the report.

Several queries have been created as "default" queries to enable your institution to select students in the same manner as delivered in 9.0. They are:

- SAA_RPT_ACADLEVEL (AA Report Query by Acad Level).
- SAA_RPT_ADVISOR (AA Report Query by Advisor).
- SAA_RPT_CAREER (AA Report Query by Career).
- SAA_RPT_PROGPLAN (AA Report Query by Plan).
- SAA_RPT_PROGRAM (AA Report Query by Program).
- SAA_RPT_STUDENT_GROUPS (AA Report Query by Student Grp).

<For steps and screen shots for Batch Processing and Printing see 'Batch Processing' document.>

NOTES:
1.) This process currently is decentralized and will be complicated for users to understand as well as the amount of paper used.
    2.) Separating audits is problematic when you print in batch
    3.) Currently, what if audits can be separated out if processed individually

Advisement Report Batch Printing

(Academic Advisement>Advisement Processes>

Printing Audits

FIT/GAP SUMMARY: **GAP** (Modification needed)

NOTES: Currently students are run in batch in DARS using What-Ifs because departments only want one program at a time when evaluating students as well as during printing. For example, if a student is in a certificate, when running a report to evaluate requirements for the graduate programs, the certificate should not appear. The issue is that UCF would like a separate report if the student is in two or more plans. Tech team will investigate using report results tables after processing the What Ifs and transfer to XML publisher. From the SAA_RESULTS table, they will populate the data into the XML template to print individual audits and those in batch. (Ideally, we would like to produce Academic Advisement What if audits so that we can "slice out" certificates and additional graduate programs. Use table SAA_ADB_RESULTS table.(Same limitation that UCF is currently experiencing with DARS but will soon be corrected. 3/22/12)

STEPS TO BUILD A PLAN IN ACADEMIC ADVISEMENT

STEP 1: Complete the Analysis

STEP 2: Add a Course List (The Child)
"Identifies the Courses"

STEP 3: Add a Requirement (The Mother)
"Finds the Course"

STEP 4: Add a Requirement Group (The Big Boy)
"Matches Students to Requirements"

Course Lists

(Academic Advisement>Academic Requirements>Define Course Lists)
"The Child" or "The Fruit"

FIT/GAP SUMMARY: FIT

NOTES: Display Wildcards defaults to YES. When you select Wildcard Indicator, this enables users to display wildcards as selectable courses for enrollment. Selecting YES as the indicator also activates the Report Description (text that can be used to describe the wildcard courses) that appears on the audit report. This was the only change at the Course List level. Many schools would like for Oracle to deliver the ability to display each course or not. Indiana filed a case for this with Oracle, and it came back, works as designed.

As a standard, we will use the 01/01/1901 date on the course list when the course catalog has the 01/01/1901 row updated. For more information on the setup see the standards document.

We can use the parameters page to accommodate the 7 year course limit for internal courses.

MOD: N/A

Requirements

(Academic Advisement>Academic Requirements>Define Academic Requirements)
"The Tree"

FIT/GAP SUMMARY: FIT

Two new additional fields in 9.0: Report Description and Report Long Description. These fields only appear on the Advisement Report, not the Static Degree Audit report.

SAMPLE COMMON REQUIREMENT SETUP:

New Window

Requirement | Parameters | Line Item | Line Item Parameters | Line Item Detail

Basic Data

Find | View All ◄ 4 of 4 ►

+ −

Academic Requirement: 000001015

*Effective Date: 05/01/2007 [📅]   *Status: Active ▾

*Requirement Usage: ADV   Academic Advisement

Academic Structure

*Academic Institution: UCF01   University of Central Florida

Academic Career: GRAD 🔍   Graduate

Academic Program: HLTMS 🔍   Health Sciences MS

Academic Plan: HLTHSCI-MS 🔍   Health Sciences MS

Academic Sub-Plan: HLTHSRVADM 🔍   Health Services Admin Trk

Description Fields

*Search Description: HLTMS Requirements   *Short Search Description: LB

*Long Description: HLTMS Requirements ✎

New Window

Requirement | **Parameters** | Line Item | Line Item Parameters | Line Item Detail

Find | View All ◄ 4 of 4 ►

+ −

Academic Requirement: 000001015   HLTMS Requirements

Effective Date: 05/01/2007   Status: Active

Unit, Course, and GPA Values

Minimum Units: [   ]   Minimum Courses: [   ]

Minimum GPA: [   ]   Min Grade Points/Unit: [   ]

Resolution Methodology

*Course Ranking Scheme: Chronological ▾

*Credit Include Mode: All Stats ▾

Choice Resolution Method: Satisfy in Sequential Order ▾

Connector Type
◉ AND   ○ OR

Display Control

*Reporting: Always Report ▾

*Print Control: Print on audit reports ▾

97

New Window

Requirement | Parameters | Line Item | Line Item Parameters | Line Item Detail

Find | View All   ◄ 4 of 4 ►

Academic Requirement: 000001015   HLTMS Requirements

Effective Date: 05/01/2007   **Status:** Active

Line Item   Find | View All   ◄ 1 of 3 ►

Basic Data   ➕ ➖

Refresh Parentheses   **Line:** 0010

*Line Type: Course Requirement ▾

Description Fields

*Search Description: HLTMS PRE-REQS   *Short Search Description: LB

*Long Description: HLTMS PRE-REQS

*Report Description: PRE-REQUISITES (RQ1015,LN10)

*Report Long Description: HLTMS Pre-requisites

*NOTE: The most common line types are: COURSE REQUIREMENT, CONDITION REQUIREMENT (used for milestones and text requirements. Other types of line types are: UNIT LIMIT GPA, SPECIFIED COURSES, GLOBAL LIMIT.

Academic Requirement: 000001015   HLTMS Requirements

Effective Date: 05/01/2007   **Status:** Active

Line Item Parameters   Find | View All   ◄ 1 of 3 ►

Line Nbr: 0010   HLTMS PRE-REQS

Unit, Course, and GPA Values

Minimum GPA:

Minimum Units: 9.00   **Maximum Units Allowed:**

Minimum Courses: **Maximum Courses Allowed:**

Min Grade Points/Unit: 3.00

Resolution Methodology

*Course Ranking Scheme: Chronological ▾   ☐ Override Standard Set Logic

*Credit Include Mode: All Stats ▾   ☐ Enable Splitting   ☐ Count Attempts

Display Control

Print Control: Print on audit reports ▾   ☑ Display Select Line

*Reporting: Always Report ▾

Display if Satisfied

Credit Include Mode: Use ALL STATS for the graduate programsity of requirements and VERIFY for requirements where you want to double dip credit like: courses taken at UCF, GPA, and overall requirements.

Print Controls for the interactive audit report include:

*Print on Audit Reports

Select to specify that the system always prints requirement information (the report descriptions and the required parameters) on the report.

*Do Not Print

Select to specify that the system never prints report description or requirement parameter information on the report.

*Print If There is Line Detail

Select to specify that if line detail is used to satisfy this requirement, then the system prints the report descriptions, required parameters, and line detail.

*Skip Printing of This Level

Select to specify that the system prints line detail but not report descriptions. Exceptions are identified below. This value is not used in analysis; it affects the printout format only.
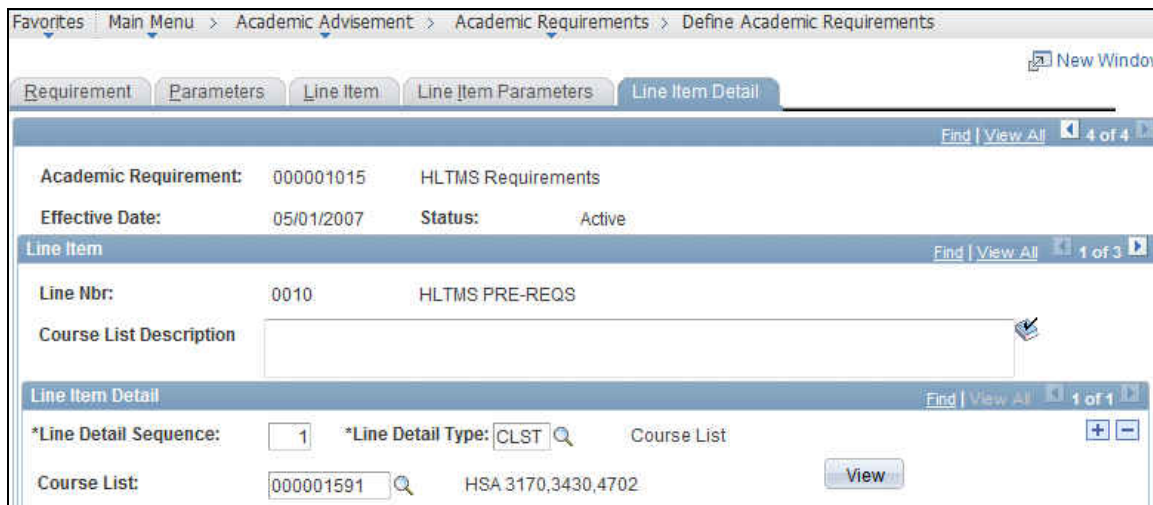
LINE ITEM DETAIL TAB is where we attach course lists or derived course lists. Course lists are static, and derived course lists are dynamic and change based on the student's transcript. Options for derived course lists are:

Derived List Line Detail Type: (As described in PBooks)

If the line detail type is Derived List, then select a list recall mode to specify the conditions that are used to select courses from the student's transcript:

None: Select to specify no field value.

2-year Institution Transfer Courses: Select to specify external transfer course credit from a two-year institution.

Note. The Advisement School Type field on the School Type Table page contains the value that drives the derived lists in academic advisement. Each school type can belong to an advisement school type. On the School Data page, you can identify a school as a two-year or four-year institution.

4-year Institution Transfer Courses: Select to specify all external transfer course credit from a four-year institution (as defined on the School Type Table page).

All Courses Used: Select to use all courses to satisfy requirements where the credit include mode value on the Line Item Parameters page is All Stats or Excl GPA. This field value retrieves all courses that are used *before* the requirement. Used means captured. Verified courses are not picked up.

List Recall Mode	**Important!** To ensure that all courses are considered during an audit, specify a requirement group reporting sequence number of 900 or greater. **All Courses:** Select to specify all courses on a student's transcript for all careers. **Courses in Target Career**: Select to specify all courses (including internally transferred courses) that the student takes in the career that is specified by the target requirement group of this requirement. For example, if a requirement group is specified as an undergraduate career requirement and points to this requirement line item detail, then the target career is Undergraduate. (During an audit, the advisement engine uses all courses that a student takes under all active careers. Also, all transfer credit, regardless of career and program to which it was posted, can be used to satisfy the requirements of all active careers. If transfer work is allowed in the requirement, then all transfer credit that is posted to the target career is included in this list. To restrict a dual-career student from using courses that are taken in one career to satisfy requirements in both careers, use the List Recall Mode value Courses in Target Career to block the cross-sharing of courses from one career to another.) **Credit with No Designation**: Select to specify all courses with no requirement designation. **Grade Category:** Select to assign to all courses a grade that belongs to a particular grade category. (When you enter this field value, the Reference Data field becomes available to record the actual grade category prompt value.) To create a grade category

prompt value, use the Grade Category Table page.

Include in GPA Courses: Select to specify all courses that are completed with a grade that is defined on the Grading Scheme Table page as Include in GPA.

Internal Transfer Credit: Select to specify equivalents that are awarded by the course credit system with a source type of internal. Courses that are transferred internally are selected from one career and have course equivalents that are applied to another career, program, or plan. External course credit, test credit, and other credits are not included. You use this field value to differentiate internally transferred courses from regularly enrolled courses. (Users who internally transfer courses and use the derived course list field value of Courses in Target Career can subtract internally transferred courses that are identified with the target career.) When courses are printed on the advisement audit, internally transferred courses are coded as IT (internally transferred). Previously, these courses were coded as EN(Enrolled).

Other Credit: Select to specify equivalents that are awarded through the Other Credits component.

Taken After Limit (#Units) (taken after limit [number of units]) and Taken Before Limit (#Units) (taken before limit [number of units]): Select to specify courses that the student takes after or before a unit limit, respectively. Enter the unit limit in the Quantity field. (The system evaluates units in chronological order.) For example, enter 60 to restrict courses to those taken after 60 units. All term- and unit-based derived list field values include transfer course credit, other credit, test credit, and internal transfer course credit. When evaluating transfer credit in term- and unit-based derived course lists, use the begin date of the articulation term (to which the credit is posted) to determine whether the credit is valid for the particular derived course list.

Note. The term-related values for List Recall Mode refer to terms in which the student was enrolled in at least one course. Terms that the student did not attend are of no consequence.

Taken Before Term in Residence Nbr (taken before term in residence number): Select to count the courses that the student took before the term that is indicated. (This value pulls in home courses as well as transfer courses taken before the term that is specified.) Enter the number of terms in the Quantity field. All term- and unit-based derived list field values include transfer course credit, other credit, test credit, and internal transfer course credit. When evaluating transfer credit in term- and unit-based derived course lists, use the begin date of the articulation term (to which the credit is posted) to determine whether or not the credit is valid for the particular derived course list.

Warning! The term *value* as used here is not related to or based on the value that is used in the Term Activation component. Academic Advisement bases its calculation of term on the number of terms in which a student was or is enrolled in at least one

course. This value is assigned at the start of a term, not upon completion.

Taken Before Term Number: Courses that the student took before the term number that appears in the Quantity field. Terms are counted starting with the first term in which a student is enrolled. For example, term 1 is the student's first term at the university and term 3 is the third term. All term- and unit-based derived list field values include transfer course credit, other credit, test credit, and internal transfer course credit. When evaluating transfer credit in term- and unit-based derived course lists, use the begin date of the articulation term (to which the credit is posted) to determine whether or not the credit is valid for the particular derived course list.

Taken in Consecutive (#Terms) (taken in consecutive [number of terms]): Select to specify how many terms in consecutive order are to be checked. Enter the number of terms in the Quantity field. (For a student, consecutive terms are defined as consecutive enrolled terms. For example, if a student is enrolled in spring and fall classes but not in summer classes, then the student's spring and fall classes are considered as consecutive.) When selecting a number of terms, the audit creates a vector of lists.

For example, if the engine is searching for three courses that were taken in two consecutive terms, then the results could be three courses from fall 1997 and spring 1998, three courses from spring 1998 and fall 1998, three courses from fall 1998 and spring 1999, and three courses from spring 1999 and fall 1999. In this example, five terms were retrieved with a total of 12 courses selected. All term- and unit-based derived list field values include transfer course credit, other credit, test credit, and internal transfer course credit. When evaluating transfer credit in term- and unit-based derived course lists, use the begin date of the articulation term (to which the credit is posted) to determine whether or not the credit is valid for the particular derived course list.

Taken in Last (#Terms) (taken in last [number of terms]): Select to specify how many consecutive terms are to be checked. These terms begin with the most recent and go back in time; for example, fall 1996, summer 1996, spring 1996. Enter the number of terms in the Quantity field. All term- and unit-based derived list field values include transfer course credit, other credit, test credit, and internal transfer course credit. When evaluating transfer credit in term- and unit-based derived course lists, use the begin date of the articulation term (to which the credit is posted) to determine whether or not the credit is valid for the particular derived course list.

Taken in Last (#Units) (taken in last [number of units]): Select to specify how many consecutive units to check. These units begin with the most recent and go back in time; for example, first fall 1996, then summer 1996, and then spring 1996. Enter the number of units in the Quantity field. All term- and unit-based derived list field values include transfer course credit, other credit, test credit, and internal transfer course credit. When evaluating transfer credit in term- and unit-based derived course lists, use the begin date of the articulation term (to which the credit is posted) to determine whether or not

the credit is valid for the particular derived course list.

Taken in Last Graded (#Terms) (taken in last graded [number of terms]): Select to specify how many consecutive graded terms are to be checked. These terms begin with the most recent and go back in time. (For example, fall 1996, summer 1996, spring 1996.) Enter the number of terms in the Quantity field. All term- and unit-based derived list field values include transfer course credit, other credit, test credit, and internal transfer course credit. When evaluating transfer credit in term- and unit-based derived course lists, use the begin date of the articulation term (to which the credit is posted) to determine whether or not the credit is valid for the particular derived course list.

Taken While in Residence: Select to specify home courses that are taken while the student is in residence regardless of career.

Test Credit: Select to specify course equivalents awarded through the Test Credits component.

Transfer Credit: Select to specify credit that is transferred in from an external institution. Test credit, other types of credit, and internally transferred coursework are not included. All transfer credit, regardless of career and program to which it is posted, can be used to satisfy the requirements of all active careers. You use the Course Credits component to input this transfer credit into the system.

Note. The Advisement School Type field on the School Type Table page contains the value that drives the derived lists in academic advisement. Each school type can belong to an advisement school type. On the School Data page, you can identify a school as a two- or four-year institution.

Used by Academic Plans and Used by Academic Programs: Select to include all courses that are used by requirement groups in the current audit defined to the plan level or program level, respectively. (Used By means used by an All Stats or Exclude GPA requirement. Verified courses are not picked up.)

Note. If a student has multiple programs (containing multiple plans), the primary academic plan is not necessarily the lowest plan sequence number under a given program, but it is the plan with the lowest plan sequence number under the program with the lowest student career number.

For example, suppose that under a program of LAU (attached to a student career number of 0), a student has a plan of PSYCH with a plan sequence number of 10. The same student has a plan of ART with a plan sequence number of 10 under a program of FAU (attached to a student career number of 1). Both plans have a plan sequence number of 10, but the plan under the program with the lowest career number is the primary plan. In this example, the primary plan is PSYCH, which is tied to a student

career number of 0 through the LAU program.

Used by Primary Academic Plan: Select to include all courses that are used by the requirement groups that point to the student's primary academic plan, which is the plan designated by the lowest plan sequence number on the Student Plan page. (For example, under a program of LAU, a student might have two plans, PSYCH and CLASSICS MINOR. If PSYCH has a plan sequence number of 10 and CLASSICS MINOR has a plan sequence number of 20, then PSYCH is the primary academic plan. On the Student Plan page, the primary career is designated as Student Career Nbr (student career number) 0.) Used By means used by an All Stats or Excl GPA requirement. Verified courses are not picked up.

Used by Primary Academic Program: Select to include all courses that are used by the requirement groups that point to the student's primary academic program, which is the program designated by the lowest career sequence number. (On the Student Program page, the primary career is designated as student career number 0.) Used By means used by an All Stats or Excl GPArequirement. Verified courses are not picked up.

Used by Requirement Group: Select to specify all courses that are used by a specific requirement group. Enter the appropriate requirement group in the Requirement Group field. If the requirement group has two effective-dated rows, then the advisement engine selects a row based on the student's requirement term for that academic level (for example, program or plan). If the Ignore Missing Target check box is selected and a line detail type of DLST points to a requirement group that does not exist for the student because of an unsatisfied precondition, then a false does not occur. If the check box is not selected and a line detail type of DLST points to a requirement group that does not exist for the student because of an unsatisfied precondition, then a false does occur. Used By means used by an All Stats or Excl GPA requirement group. Verified courses are not picked up.

Used by Requirement: Select to specify all courses that are used by a specific requirement. Enter the appropriate requirement in the Academic Requirement field. (A requirement line number in the Line Nbr [line number] field is optional. If you leave this field blank and there are multiple lines in the requirement, then all lines are evaluated.) If the requirement has two effective-dated rows, then the effective-dated row that is selected by the advisement engine is based on the student's requirement term for that academic level (for example, program or plan). If you select the Ignore Missing Target check box and a line detail type of DLST points to a requirement that does not exist for the student because of an unsatisfied precondition, then a false does not occur. If you do not select the check box and a line detail type of DLST points to a requirement that does not exist for the student because of an unsatisfied precondition, then a false does occur. Used By means used by an All Stats or Excl GPA requirement. Verified courses are not picked up.

Values for this field are delivered with your system as translate values. Do not modify

these values in any way. Any modifications to these values will require a substantial programming effort.

Requirement Lines

(Academic Advisement>Academic Requirements>Define Academic Requirements Line Item) "The Branch to the Tree"

FIT/GAP SUMMARY: FIT

NOTES: Two new additional fields: Report Description and Report Long Description. These fields only appear on the Advisement Report, not the Static   Degree Audit report. The search description, short search description and long   description appear on the static degree audit report.

Search description is used for prompting. The short description is used for searching when coding student exceptions.

DISPLAY select line checkbox is more important that EVER in 9.0. When this checkbox is not checked, students cannot enroll in a course from their Planner or   their Advisement Report.

Requirement Group

(Academic Advisement>Academic Requirements>Define Academic Requirements Group) "The Big Boy"

FIT/GAP SUMMARY: FIT

NOTES: These fields only appear on the Advisement Report, not the Static Degree Audit report. The search description, short search description and long description appear on the static degree audit report.

Reviewed setting up courses at the Requirement Group level. Doesn't show the selectable courses on the interactive but they do display on the PDF. (Will not use this functionality at UCF.)

As a standard, resolution methodology remains as the default- but see

Resolution Methodology: (as taken from PeopleBooks)

Select how courses in the requirement group are included in the degree audit:

All Stats: Select to specify that all course statistics are reported. A course captured by an All Stats requirement group is used for that requirement group and cannot be counted toward any other All Stats requirement group.

Excl GPA: Select to specify that courses in this requirement group are excluded from GPA. You use this value at the lower level of requirement or at the requirement line level to prevent the system from using the GPA from certain courses at the higher level of requirement or requirement group. A course captured by an Excl GPA requirement is used for that requirement group and cannot be counted toward any other All Stats or Excl GPA requirement group.

Credit Include Mode

Verify: Select to specify that the application checks and verifies that the course was taken, but does not record the credit, so the course can be used elsewhere in the audit. A course captured by a Verify requirement group can be used by another Verify requirement group, Excl GPA requirement group, or All Stats requirement group. However, the course is counted toward requirement group completion. For example, for a graduate program electives requirement group, verify that all graduate students in the School of Education master's degree program complete at least two courses numbered 400 or higher in an academic area or plan other than their own. You use this value more commonly in requirements that have overall unit requirements, such as completion of 120 units to graduate, required term unit loads, or required academic standing status.

Values for this field are delivered with your system as translate values. Do not modify these values in any way. Any modifications to these values will require a substantial programming effort.

Important! When the credit include mode value is Verify, the parameters (Minimum Units and Maximum Units Allowed field values) act as boundaries for determining a truth value. For example, if the Minimum Units value is 6.0, the Maximum Units Allowed value is 15.0, and the student has fewer than six or more than 15 units, then the truth value is false. If the student is within this range, then the truth value is true. Verify accepts and reports all courses that match the course list and transcript, whereas the All Stats and Excl GPA lines use the minimum courses in order to free additional courses to be used elsewhere.

In the following example, the requirement group requires a total of four courses for 12 units with a combined minimum GPA of 3.5. The three detail lines (requirements) contribute to these parameters according to the credit include mode value assigned at each level:

Requirement Group

4 courses
12 units
3.5 gpa
(All Stats)

Requirement 1
(Excl GPA)

Line 1:
1 course, 3 units, 2.0 gpa
(All Stats)

Requirement 2
3 courses
9 units
(All Stats)

Line 1:
2 courses, 6 units, 3.5 gpa
(All Stats)

Line 2:
3 courses
(Verify)

Line 3:
1 course, 3 units
(Excl GPA)

Requirement 3
(Verify)

Line 1:
2 courses
(All Stats)
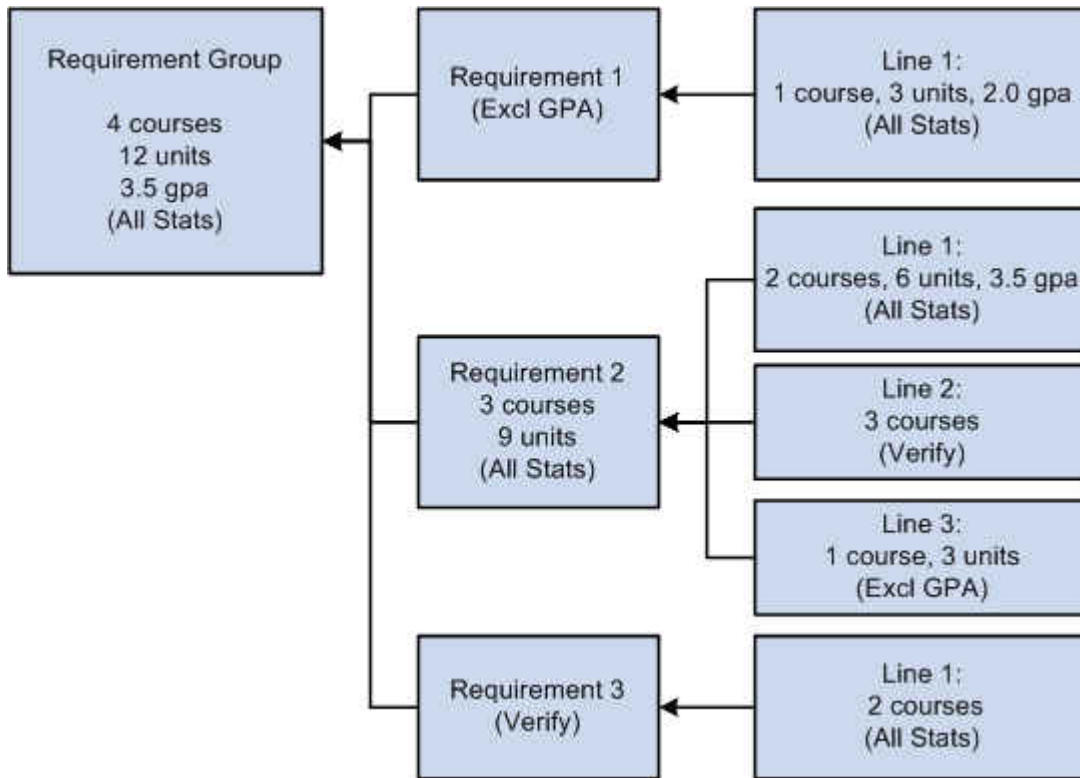
Example of Credit Include Mode

Requirement 1 has one detail line. The line requires one course of three units with a minimum GPA of 2.0. Credit include mode for this line is set to All Stats, which allows units, course count, and GPA to be passed to the requirement level. The requirement credit include mode is set to Excl GPA, which allows only units and course count to contribute to the minimum parameters required at the requirement group level.

Requirement 2 requires a minimum of three courses for a total of nine units. Line 1 requires two courses with a minimum of six units and a minimum GPA of 3.5. Credit include mode for this line is set to All Stats, so all information is passed to the requirement level. Because this is the only line that contributes to the GPA at the requirement level, the GPA required at the requirement group level is derived from the courses captured here. Line 2 requires three courses, but the credit include mode at this level is set to Verify, so no course information is passed to the requirement level. No courses used here contribute to the three courses or nine units at the requirement level. This line only helps to satisfy the overall requirement by passing a true (if the three courses are found) or false. Line 3 requires one course of three units. The credit include mode for this line is set to Excl GPA, which prohibits the line from contributing to the minimum 3.5 GPA at the requirement group level. Only course count and units are passed to the requirement level.

Requirement 3 has one detail line that requires two courses. Credit include mode for this line is set to All Stats, so courses are used to satisfy this line, and course count, units, and GPA are passed to the requirement level. However, the credit include mode for the requirement is set to

Verify, so no course information is passed to the requirement group level. This requirement passes a true or false value to the requirement group level and is used in determining the completion status of the overall requirement group.

Choice Resolution Method	This is the preferred method of analyzing multiple partitions in an AND or OR statement. Values for this field are delivered with your system as translate values. Do not modify these values in any way. Any modifications to these values will require a substantial programming effort. Values are: Satisfy in Sequential Order: Select to specify that the system evaluates detail lines in sequential order, except for limits that are analyzed first. For example, if the requirement consists of Line 10 OR Line 20 OR Line 30 OR Line 40 where partition sharing is allowed and the minimum partitions to complete is two, then any two partitions must be satisfied, although Line 10 and Line 20 are analyzed first. In another example, if a requirement consists of Line 10 OR Line 20, then a course that can satisfy both Line 10 or Line 20 is used to satisfy Line 10 if Line 10 is not already satisfied. If a student has completed Math 1 and Math 5, and Line 10 requires Math 1 and Math 2 and Line 20 requires Math 1 and Math 5, then Math 1 is used to satisfy Line 10, not Line 20. When the field value is Satisfy in Sequential Order, a student can satisfy Line 20 before Line 10 if the lines require different courses and the student has completed the required courses for Line 20. Investigate All Combinations: Select to specify that after the system analyzes limits, it sorts detail lines to find the best combination in regard to the requirement group. For example, if the requirement consists of Line 10 OR Line 20 OR Line 30 OR Line 40 where partition sharing is allowed and the minimum partitions to complete is two, then any two of the lines must be satisfied. In another example, Line 10 requires Math 1 and Math 2 and Line 20 requires Math 1 and Math 5. The student has completed Math 1 and Math 5. Line 20 is satisfied. **Important!** Regardless of which Choice Resolution Method field value you select, if the student does not meet the requirements of any of the lines, then the audit lists the courses that are available to fulfill each of the partitions. If the student meets the requirements for the minimum number of partitions, then the audit lists only the courses for the satisfied partitions.
Connector Type	Select the main (default) Boolean operator to use in the equation that contains the detail lines. Detail lines joined by the opposite of the main connector type are grouped into one partition. Detail lines joined by the main connector are considered as individual components (or partitions) of the equation. A partition is each detail line in the equation or each set of detail lines grouped by parentheses. For example, if the connector type is AND and the detail lines are A OR B AND C OR D AND E, then the detail appears on the page as (A OR B) AND (C OR D) AND E. The first partition is (A OR B), the second partition is (C OR D), and the

third partition is E. The main connector (that is, the connector that joins the partitions) is AND. (The connector that joins components within a partition is always the opposite of the main connector type.) In another example, if the main connector is OR and the detail lines are A OR B AND C OR D, then the detail appears on the page as A OR (B AND C) OR D. The first partition is A, the second partition is (B AND C), and the third partition is D. The system uses this field as the connector default on the Detail page when you insert rows.

Display Control

Select the conditions under which the requirement group is reported:

Always Report: Select to specify that the requirement group is always reported, regardless of the completion status.

Report Only When Not Satisfied: Select to specify that the requirement group is reported only if the student did not successfully complete it. For example, you could use this value to report probationary status.

Report Only When Satisfied: Select to specify that the requirement group is reported only when the student successfully completes it. For example, you could use this value to report honors status.

Reporting Except for Always Report, every reporting value acts as a post condition. Values for this field are delivered with your system as translate values. Do not modify these values in any way. Any modifications to these values will require a substantial programming effort.

Important! The Reporting field value Report Only When Not Satisfied behaves differently depending on whether the Credit Include Mode field value is All Stats or Verify. For example, for a requirement with a Minimum Units field value of 3.00, a Credit Include Mode field value of All Stats, and a Reporting field value of Report Only When Not Satisfied, the results of the audit are not as expected because the requirement group may be printed on the degree audit report even if it is unsatisfied. However, if the Credit Include Mode field value is Verify, then the result is predictable.
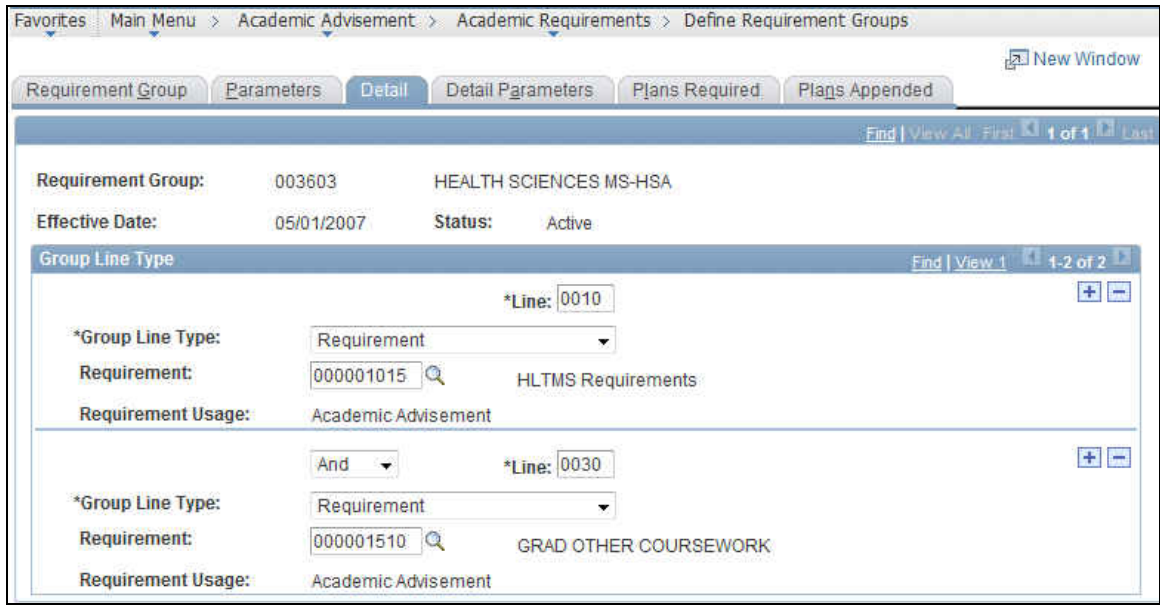
*NOTE: At this point, only the first three tabs are required to save a requirement group.

The detail parameters tab is only required when we are adding courses at the requirement group level. What is available changes based on the selection on the Detail tab.

Plans Required tab is only necessary when students are required to select a sub plan, which we may use in the future.

| Requirement Group | Parameters | Detail | Detail Parameters | Plans Required | Plans Appended |

Find | View All 1 of 1

Requirement Group: 003603   HEALTH SCIENCES MS-HSA

Effective Date: 05/01/2007   **Status:** Active

☑ Other Plans/Sub-Plans Required   1   **Number Required**

Plans/SubPlans Required   Find | View All 1 of 1

*Plan Sequence: 1

Academic Institution: University of Central Florida

Academic Career: Graduate

Academic Program:

*Academic Plan:

Academic Sub-Plan:

The Plans Appended tab is only required when there are specific requirement groups that should apply to a student, but the student's academic structure is not the same. This is functionality at this time doesn't appear will be used.

New Win

| Requirement Group | Parameters | Detail | Detail Parameters | Plans Required | Plans Appended |

Find | View All 1 of 1

Requirement Group: 003603   HEALTH SCIENCES MS-HSA

Effective Date: 05/01/2007   **Status:** Active

Include Requirement Groups for

Academic Institution: University of Central Florida

Academic Career:

Academic Program:

Academic Plan:

Academic Sub-Plan:

Course Share Set

(Academic Advisement>Student Advisement>Authorize Student Exceptions)
Course Share Sets are used so that Requirement Groups can share courses among each other.

FIT/GAP SUMMARY: FIT- First create the course share set. When you attach the course share sets to the requirement groups, they will appear here.

This is the parameters tab of the requirement group, where we attach the course share setup.

Student Exceptions

(Academic Advisement>Student Advisement>Authorize Student Exceptions)

      FIT/GAP SUMMARY: GAP

NOTES: There is an issue with course substitutions. When a course is being substituted for a course that the student has not taken, the course substitution works as designed. However, when

we substitute a course for a course the student has already taken, then the business process required would be to substitute the course and exclude the one that the student has already taken via Authorize Student Exceptions. The other issue that is problematic for course substitutions is that when a course changes the subject and catalog number, the course substitution now longer works.

Create Course Substitution

Name:	Student ID:
Academic Career: Graduate	Student Career Nbr: 0

Find | View All   1 of 1

*Substitution Seq:	0001	*Course Source:	Enrollment	
*Long Description:	Substitute HIM5118C for HSA 6108			

Select Course:	Search	044862	HIM	5118C	HEALTH CARE & INFO TECHNOLOGY
Substitute for:	Search	011882	HSA	6108	HEALTH CARE ORG & MGMT II

Save   Return to Search   Previous in List   Next in List   Notify

Course substitutions and course directives (under authorize student exceptions) appear as a note/link on the interactive audit. Indications of Requirement Changes do not appear on the interactive report, but they do appear on the PDF report. The Course Substitution functionality is not working as designed. The Course does not become the course when a student posts an exception. For students that exceed the 7 year rule, the course will need to be excluded from the audit.

Delivered Student Exceptions under Authorize Student Exceptions are: Requirement Change, Requirement Waiver, Course Directives (including Exclusions), Requirement Override, and Course Substitutions.

Milestones

(Set Up SACR> Product Related> Student Records>Milestone Table)

To attach to Students: (Records and Enrollment> Enroll Students>Student Milestones)

> **FIT/GAP SUMMARY**: FIT

> **NOTES:**

- Once Milestone is setup it must be attached to a dynamic condition [if not attached to dynamic condition it will not work in AA].

- To attach a milestone to a Requirement Line, use Line Item Detail Type "Condition"

- Attach milestone to student [Student Milestones]. Must be done manually. There isn't a process that updates students manually to milestones.

- Currently no delivered security for Milestones

- Need to add as a modification the Advisor's name, to display the dates of the thesis and dissertation and title for that particular milestone on the PDF report and Interactive.

SESSION NOTES: After looking at students with milestones and multiple effective dated rows, appears that multiple effective dated rows presents a problem. When the milestone is not attached to the most effective dated row, it doesn't satisfy the requirement. Some clean up will be required. Also, for students with milestones (patents and release option milestones, we would like to be capture on a certain effective date, and if we are recommending only one effective dated row this could be problematic.) Training will be involved for determining how to copy the current milestone using milestone templates.

Current milestones that will be setup and used with dynamic conditions are:
- Format Review
- Candidacy
- Dissertation
- Defense

QUESTIONS:

- Can we create a template for GRAD. For the graduate programs of students they use the template. We can create per plan at the academic level and assign them to students? Yes this is possible.
- 4/14/11- Explained that only one Milestone Template can be created at the Career level. Gave the option of adding all possible milestones to that template and copying it to a student (then deleting what milestones don't apply to that specific student) or you have the option to identify what type of student you want it used for i.e. PhD or Masters only. Remember, the Milestone Template is only used as a tool to help assist with data entry.
- What about existing clean up for students? Different types of clean up query but the scope isn't so much that requires a modification. 3/24/11 after researching other students, the clean up required may require a mod as there are approximately 500 students that require clean up with multiple effective dated rows.

Dynamic Conditions

(Academic Advisement> Academic Requirements>Define Dynamic Conditions)

FIT/GAP SUMMARY: FIT

NOTES: Dynamic Conditions translate Milestone into a condition for the degree audit

7 Year Course Limit

(Academic Advisement> Academic Requirements>)

FIT/GAP SUMMARY: GAP –Modification Required

NOTES: This is line in the graduate policies requirement used to calculate OLD courses not based on admit or requirement term but graduation date. (Needs more discussion on 7 year violation)

The course list 1590 needs to be updated with the right term. This should be updated at the end of each term with standard date of 2/1/XX or 9/1/XX or 6/30/XX. This is attached to the policy requirements where the requirement designation is subtracted as well as internal transfer credit. We want to make sure to test students that would be the "close calls." Traveling scholars still are subject to this rule, which is why they aren't subtracted from 1014. This is more for external students. Carl will run a query to find students with COMP row and Non Degree- Dan is a perfect test student. Test other students that are discontinued.. We could use this process with the exception of the internal degrees because we are unable to determine the courses that were used to meet the requirement.

As a work around for the student that does not get a petition- approved.

MOVE TO TRANSFER CREDIT AREA: Transfer Credit applied to Materials Science and they changed to Optics- we will run a query to determine those students that have program change

and contact the department to determine whether that transfer credit is still valid. We will let the credit remain with the original program. If the program is discontinued, the transfer credit is still POSTED and valid on the student's record.

>For 30 hour Course Waivers UCF will use Requirement Change Functionality<

Query of how many students needed to have clean up for 7 year program limit with Non Degree and COMP rows so that we can determine how many students violate this. Need query to determine this.

Consider checklist to remind student 7 year is going to expire, Other option to bring in comments from Eval to resolve the issue of courses expiring. Or use positive service indicator to indicator that you within the 7 year. (Once petition gets approved then we will make a comment in the exception that will let us know when that expires instead of using the checklist.)

We attach the CLST 1604 to RQ 1014, (which will change because we will need to attach this course list to the last line of the graduate programs requirement because we want to point to the requirement that is being used.)

Requirement Line Item Level

This is the line detail for the 7 year course list. (*Note: When the course list is updated the other requirements do not need updating.)

Academic Requirement: 000001011 ACG MAJOR COURSES

Effective Date: 05/01/2009 Status: Active

Line Item Parameters

Line Nbr: 0070 7 YEAR PROGRAM LIMIT

Unit, Course, and GPA Values

Minimum GPA:		Maximum GPA Allowed:	
Minimum Units:		Maximum Units Allowed:	
Minimum Courses:		Maximum Courses Allowed:	0.01
Min Grade Points/Unit:			

Resolution Methodology

*Course Ranking Scheme: Chronological ☐ Override Standard Set Logic

*Credit Include Mode: Verify ☐ Enable Splitting ☐ Count Attempts

Display Control

Print Control: Print on audit reports ☐ Display Select Line

*Reporting: Always Report

Line Detail Sequence: 1 Line Detail Type: DLST Derived Course List

List Recall Mode: Used by Requirement Group ☑ Ignore Missing Target

Requirement Group: 003600 ACCT MSA

*Line Detail Sequence: 2 *Line Detail Type: CLST Course List

List Include Mode: I Intersection with

Course List: 000001604 7 year limit- internal courses [View]

*Line Detail Sequence: 3 *Line Detail Type: CLST Course List

List Include Mode: N Subtract from

Course List: 000001605 ALL REQDES ED EXTERNAL COURSES [View]

*Line Detail Sequence: 4 *Line Detail Type: CLST Course List

List Include Mode: N Subtract from

Course List: 000001606 REQ DES 7YVI-7 YEAR VIOLATION [View]

*Line Detail Sequence: 5 *Line Detail Type: CLST Course List

List Include Mode: N Subtract from

Course List: 000001817 All 1000, 2000, 3000, 4000 [View]

Screen shot of CLST 1605 with the ED requirement designation attached.

120

Course List Description | **Course List Detail** | **Course List Parameters**

Find | View All 1 of 1

Course List: 000001605

*Effective Date: 01/01/1901   *Status: Active

*Description: ALL REQDES ED EXTERNAL COURSES

*Short Description: LB   *Usage: Academic Advisement

Long Description: Courses from an earned degree (requirement designation)

*Academic Institution: UCF01   University of Central Florida

Academic Career: GRAD   Graduate

Academic Program:

Academic Plan:

Academic Sub-Plan:

Course List Description | **Course List Detail** | **Course List Parameters**

Find | View All 1 of 1

Course List: 000001605   Description: ALL REQDES ED EXTERNAL COURSES

Effective Date: 01/01/1901   Status: Active

Course List Details

Find | First 1 of 1 Last

*Course Sequence: 1   ☑ WildCard Indicator   ☑ Display Wildcard Courses

Academic Institution: UCF01   University of Central Florida

Academic Group:

Subject:

Catalog Nbr: Report Description:

Course List Description | **Course List Detail** | **Course List Parameters**

Find | View All 1 of 1

Course List: 000001605   Description: ALL REQDES ED EXTERNAL COURSES

Effective Date: 01/01/1901   Status: Active

Course Information

Find | View All 1 of 1

Course Sequence: 1

Course Information:

Min Units/Course:

Min Grade Points/Unit:

Transfer Level Allowed: Always Allow

Requirement Designation: ED   Earned Degree

Valid Begin: ☐ Course must be GPA material

Valid End: ☑ Test Credit is Allowed

☑ Other Credit is Allowed

☐ Exclude In-Progress Credit

121

"UNUSUAL" SETUP

Requirements- Partitions

(COGNITIVE SCIENCES EXAMPLE – The requirement is that students must take a course in 3 of the 4 areas.)

FIT/GAP SUMMARY: FIT

Notes: It is important to review the updates on the Parameters tab of the requirement as well as the line item. Also notice the 12 units and the 3 partitions with the OR connector type.

On the line item parameters, the **HIDE STATUS** checkbox is selected so that all of the lines don't appear as satisfied.

Academic Requirement:	000001507 COGNITIVE SCIENCE CERTIFICATE
Effective Date:	05/01/2007 Status: Active

Line Item   Find | View 1   1-4 of 4

Basic Data   + −

Refresh Parentheses   Line: 0020

*Line Type: Course Requirement

Description Fields

*Search Description: LANGUAGE AND LINGUISTICS   *Short Search Description: JMO

*Long Description: LANGUAGE AND LINGUISTICS

*Report Description: LANGUAGE AND LINGUISTICS (RQ1507,LN20)

*Report Long Description: Language and Linguistics

Display of Status

☑ Hide Status

Basic Data   + −

Refresh Parentheses   Or ▼   Line: 0050

*Line Type: Course Requirement

Description Fields

*Search Description: PSYCHOLOGY   *Short Search Description: JMO

*Long Description: PSYCHOLOGY

*Report Description: PSYCHOLOGY (RQ1507,LN50)

*Report Long Description: Psychology

Display of Status

☑ Hide Status

New Programs in Catalog with all XXXX courses (Special Topics)

Building a new program course list when there are no exact courses to add to the course list.

FIT/GAP SUMMARY: FIT

Notes: There are a few areas that will need to be researched before this program is built however, this task will not take long.

Other issues that need researching

GPA- Stored GPA (Student Special GPA) that we need to make a condition satisfied or not satisfied. It is stored in Special GPA. How can we set up a requirement that looks at the Stored GPA. (On 3/31/11 received information from UC-Santa Cruz about their modification.)

Also discussed schools that have used internal transfer from programs not careers.

DEGREE AUDIT MAINTENANCE REPORTS

Reverse Engineering Report
(Academic Advisement>Advisement Reports>Reverse Engineering)
This process is helpful for identifying courses in course lists. Queries can also be run to determine this as well.

FIT/GAP SUMMARY: FIT

Requirement Group Summary
(Academic Advisement>Summaries>Academic Requirement Group)
These screens are high-level overview of the requirements and course lists in the requirement group
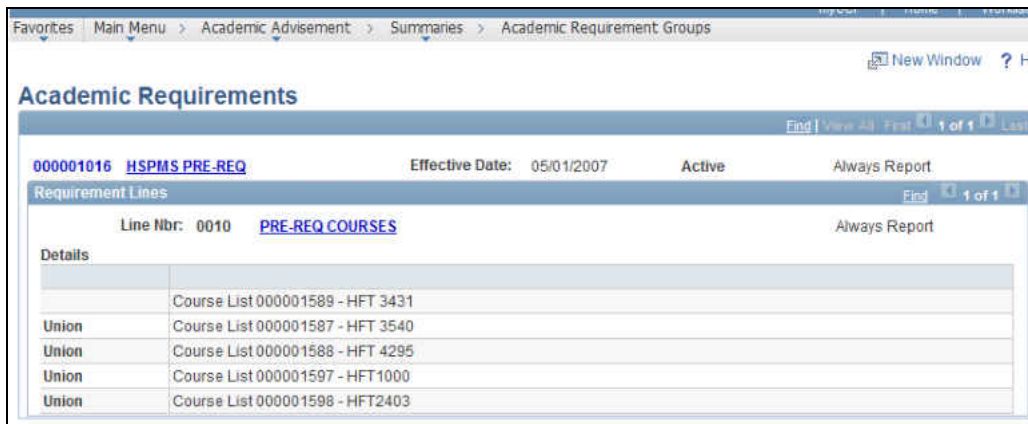
FIT/GAP SUMMARY: FIT

Requirement Summary
(Academic Advisement>Summaries>Academic Requirements)
These screens are high-level overview of lines in the requirement and course lists attached.

FIT/GAP SUMMARY: FIT

MISCELLANEOUS REPORTS

(Academic Advisement>Advisement Reports>Miscellaneous Reports)
This report provides a summary of entity groups and conditions

FIT/GAP SUMMARY: FIT

PURGING ADVISEMENT REPORTS RESULTS

(Academic Advisement>Advisement Processes>Purge Report Results)
This process purges the report results tables that are automatically populated with advisement reports are processed.

FIT/GAP SUMMARY: FIT

CURRICULUM MANAGEMENT

Requirement Designations

(Curriculum Management>Dynamic Dates>Dynamic Class Dates Table)
(Set Up SACR> Product Related>Student Records>Curriculum Management>Dynamic Class Dates)

FIT/GAP Summary: FIT

NOTES: Created requirement designations for (ED) Earned Degree, (TS)Traveling Scholars, (SS) Senior Scholars, 7YVI (7 year violation)

Course Catalog- New Typically Offered Field

(Set Up SACR> Product Related>Student Records>Curriculum)

New field of typically offered appears on the interactive advisement report under selectable courses.

FIT/GAP SUMMARY: FIT but UCF will not use this field

NOTES: UCF will not populate this new field for every course. *There is the option   to display/not display the typically offered. (Set Up SACR> Common Definitions> Self Service>Student Records)*

Repeat Rule & Repeat Scheme

<SEE REPEAT RULE DOCUMENT>

FIT/GAP SUMMARY: Outstanding question for Graduate- Would like to test more students and run the process. We need to see how this effects the grade on the transcript because all grades must be calc'd into the GPA-does it need to be in UCF cumulative or other UCF GPAs besides the grad status gpa. We do not want it to look like there is grade forgiveness at the graduate level on the transcript.

New policy-Both grades should now be in the GPA and on the transcript everywhere. (Modification)

STUDENT DATA

Program/Plan Changes

(Records & Enrollment>Career and Program Information>Student Program/Plan)

FIT/GAP SUMMARY: FIT (Already using these pages but requirement terms and advisement status are even more important fields because they apply to the Academic Advisement report.)

NOTES: Important fields on the Student Program/Plan (include and not include status)
Also, need to change internal business process and test DARS interface with changes.

Transfer Credit >Manual Transfer Credit

(Notes: Doesn't appear to be an issue with External Transfer Credit, but internal as there currently isn't a way to identify which transfer courses student has actually taken towards the earned degree. 3/21/11)

FIT/GAP SUMMARY: FIT

NOTES: Dan confirmed for us that we will not need the DARS interface from DARS back to PeopleSoft to populate these fields.

This is where we would attach the Requirement Designation to courses in transfer.
(ED- Earned Degree) <See document outlining the steps for manual transfer credit.>

TEXT MESSAGES

How to setup a text message in Advisement

FIT/GAP Summary: FIT (There was some concern about all of the possible ways a student could access the Planner, Academic Requirements, and What if Report)

NOTES: Unfortunately there isn't an easy way to set up test messages in Academic Advisement. However, use the legend as a template in setting up "text messages" or messages that shouldn't have a status of "satisfied" or "not satisfied." Below is an example of the legend/disclaimer that will always be satisfied. (Key- always make the requirement a CONDITION that is ALWAYS SATISFIED.) Remember, when it is always satisfied, the requirement will be collapsed on the interactive audit.

DO NOT PRINT selected here means the entire requirement don't print on the audit report.

STUDENT SELF SERVICE

Student Center

(Self Service>Student Center)

FIT/GAP Summary: FIT (There was some concern about all of the possible ways a student could access the Planner, Academic Requirements, and What if Report)

Other way of getting to the audit via MY ACADEMICS **MOD REQUIRED to show the links in the current environment.**

MOD: We want to hide this audit in self service because it produces a

NOTES: When a student takes courses from the Planner, the courses are not hidden or automatically removed in the planner. They remain. Because students are currently accustomed to the drop down, the recommendation was made to have the headers in the drop down:

- Degree Audit: Academic Requirements
- Degree Audit: My Planner
- Degree Audit: what if

MOD: UCF will investigate if there is a exisiting mod that should also be used for searching for courses using the planner.

Student Services Center

(Campus Community> Student Service Center)
(Campus Community>Student Service Ctr-Student)

FIT/GAP Summary: FIT

NOTES: Student Services Center is the "staff" view. Course History page displays a sortable list of all the courses that a student has taken. The transfer credit icon is the same for transfer credit, test credit and other credit. There was a case into Oracle that requests different icons, but they came back with "works as designed."
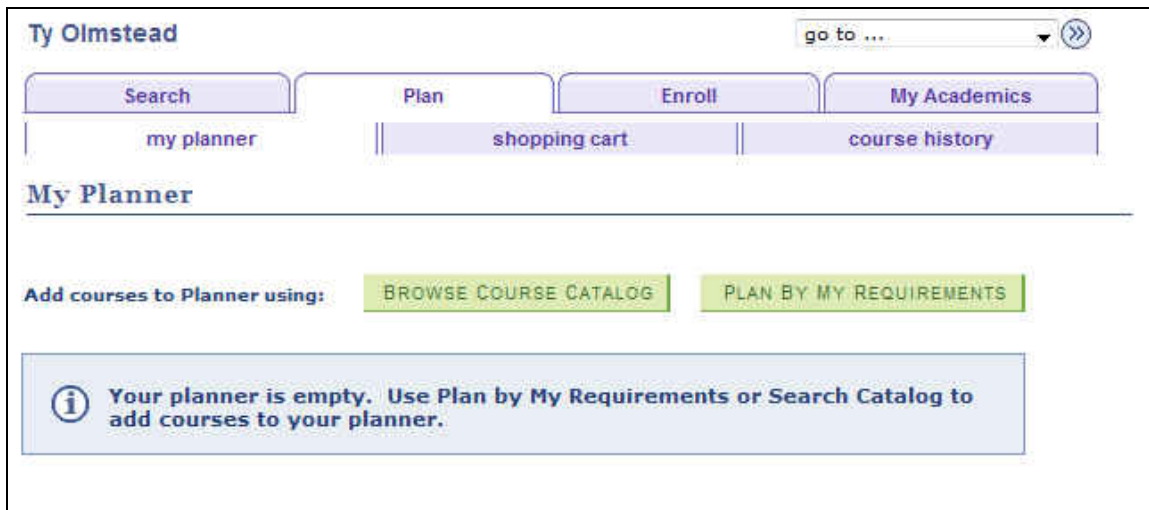
Enrollment Backpack & Plan and Enroll by My Requirements

(Self Service>Student Center>Academics>View Enroll)
(Self Service>Student Center>Academics>Plan)

There are now three methods of enrolling for students:

- Class Search
- My Requirements (NEW)- Produces a truncated audit-displays courses by term **MOD:** under the Shopping Cart/ My Planner
- My Planner

My Planner

(Self Service>Student Center>My Planner)

FIT/GAP Summary: **NEED MORE DISCUSSION** (particularly with eforms and pre-populating the planner.)

NOTES: The planner replaces the wish list in 8.9. Students can plan for courses from the course catalog. Students can move and add courses into their planner by term or they can plan for them in an UNASSIGNED area. The planner also displays whether a course has a pre-requisite as well as if it is an inactive course. There is an icon that indicates whether a student planned for a course using my planner or plan by my requirements.One limitation with the planner is that students currently cannot plan for topics courses.

Shows requirements met by planned courses. Planned courses move to audit? Does not update after student takes course.

- Courses in Planner show the icon indicating a course will meet requirement if the course is added to planner from "plan by requirements."

- Classes can be moved from the planner to enrollments.

- Courses that are planned for prior terms cannot be eliminated or hidden with calendar (term table) functionality. The date range drives which selection terms are available for courses to be moved to for planning purposes.

- With planner, PS provides no way to manage student plans, so after several years we will need to have a way to clear out old plans.

As delivered, faculty and advisors can view a student's planner.
Discussion Follow Up: How are other schools "cleaning up" the planner? Santa Cruz is live with the planner, and they aren't currently doing any "clean up." Indiana is live on the Planner and they aren't doing any clean up at this time. Have not discussed yet 4/20/11

Is there benefit to pre-populating the planner for students?
While My Planner appears to be a real fit for UCF, there are a couple of items they would like to see changed.

MODS: One enhancement discussed is to add a warning in red before students add courses to the planner to warn /remind students when they add courses to the planner, which does not indicate

they are enrolled in the courses. Example: "Adding a class to your planner does not guarantee a place in the class."

PLANNER TABLES:

SSS_CRSPLN_ITEM
SSS_CRSE_PLNR
SSS_CRSPLN_TERM
SSS_CRSPLN_TRM2

In the setup of the term, we can control the terms that appear in the student's planner.

NEXT STEPS FOR TEAM

*Determine overall requirements for each plan

(i.e. 36 units and code at the **Requirement Group level**. Still determining the pros and cons of entering the overall units at the Group level. Can also enter the number of units in the description.
Team has decided not to post the total units unless program requests it (or set up is complex and is needed)- August 2011

*Only code pre-reqs if they are coded in DARS or if programs request based on meetings

*Add to each requirement group: (To be included in maintenance doc and standards)
RQ 1503 Graduate Milestones One for MS and one for DOC (those that should be excluded are TBD)
RQ 1510- Coursework not used for degree requirements

*Clean up milestones and start using milestone templates for new students

*Start coding transfer credit using transfer credit manual without pulling information from DARS- October 2011

*7VYI Requirement

*Internal Business Process to revise, streamline, change

*After more configuration has occurred, create a document outlining necessary tasks to maintain Academic Advisement

TEST STUDENTS USED FOR PROTOTYPING

TEST STUDENT	GRADUATE PROGRAMS	Example of:	Need to run what if
2441664	Accounting	7 Year Limit Not Violated	
0743259	HealthSciences	I/N courses violated	
2409183	Accounting		X
0326252	Health Sciences	7 Year Limit Violated	
0790778	Accounting		X (COMP)
2012054	Nursing		X
0104184		Transfer	X
1603984	Health Sciences Track		X
2966984	Entrepreneurship Certificate		
2696544		Completed	X
0313237			

<Jessica is keeping a complete list of test students.>

APPENDIX G: SAMPLE WEBSITE CONTENT

Welcome to the new Graduate Plan of Study (GPS) Advisement Project

What's Happening?

As part of the College of Graduate Studies ongoing efforts to provide improvements in services for our graduate constituents, we are working together with graduate programs and Computer Services to provide a tool that will enhance the student's advising experience. Graduate degree and certificate seeking students will be able retrieve a real-time status of their academic career progress at MyUCF where the DARS audit currently is located. The GPS provides a record of a student's academic progress toward completion of their academic degree or certificate program. This new feature allows the student to review the courses they have taken, including in-progress courses, and how many courses they need to complete their degree. The new report will also show students and advisors a student's progress toward non course requirements such as publications, qualifying exams and dissertation steps. The GPS can also assist students and advisors in planning for current and future courses as they pertain to the student's degree requirements.

Degree requirements in the new GPS are being programmed for students that are in the catalog year 2007-2008 forward. Students with catalog years prior to this date will require special handling. Graduate programs with students in catalog years prior to 2007-2008 are being contacted to determine special handling options.

For students in catalog years 2007-2008 forward, any current changes to the advisement report are being converted to the new system

Why PeopleSoft Advisement?

- Course AND Non Course requirements can be tracked easily
- Interactive report allows for enrollment from advisement report
- Planner allows students to plan when they will take courses
- Added batch printing functionality
- Stable technical support from Computer Services
- No more interface
    - Allows for real time updates
    - No more overnight troubleshooting
    - Eliminates interface errors

When will this take place?

The new GPS reports will be available for use late in the summer of 2012. The target go-live date is July 15, 2012. Aspects of the process may go live in May if available.

APPENDIX H: GPS EVALUATION SURVEY

Advisement Report (GPS)

Evaluation

1) When you first heard that the Graduate College would be changing from DARS to the PeopleSoft Advisement Report, what was your reaction?

2) Do you think that your input was considered when creating the new advisement report and the components that would be a part of it?

3) Are you satisfied with the amount of input you had in creating the report?

4) Are you satisfied with how the report is working?

5) What additional functionality would you like to see added to the report?

APPENDIX I: PEOPLESOFT ADVISEMENT MODULE IMPLEMTATION

PROPOSAL

<div align="center">**PeopleSoft Advisement Module**</div>

<div align="center">**Implementation proposal**</div>

Executive Summary

The College of Graduate Studies has been researching advising options for graduate programs and graduate students. We have a need, with the growth of the graduate programs and student , to be able to track and advise students properly and easily. The options considered were continuing the use of DARS, development of an entirely new system with internal IT staff or the implementation of the PeopleSoft advisement module.

The current DARS system is primarily an undergraduate advising tool and is not suited to the advisement of graduate students. Functionality is limited, documentation does not exist and it requires a technical staff person to maintain the system. This has limited the ability for cross-training among the Student Services staff. While Computer Services supports us and the system, complications continue to arise because of the need to interface between the two systems of PeopleSoft and DARS.

The development of a new system internally, would provide the greatest level of functionality specific to the needs of UCF's graduate programs. This effort would require substantial resources for more than a year and a half. Since most of the desired functionality was found to be available in both the DARS and PeopleSoft Advisement Module,   we determined that the best course of action would be to use an existing product.

The implementation of the PeopleSoft Advisement Module would allow for advisement that is more closely aligned to the specific needs of graduate students and programs. Both functional and technical staff are familiar with PeopleSoft functionality and programming, and

could more easily support this system. Based on our research findings, our recommendation is to implement the PeopleSoft Advisement Module. We consider this to be the most appropriate long term solution for providing the best possible advising for graduate students.

Computer Services has talked with us and is on-board to help with the development of this advisement module. I will need a letter from you stating that the graduate programs and colleges need to cooperate with us on doing this (FIU said this was the biggest factor in their success).

Benefits of a using the Peoplesoft Advisement Module

The following are ways that implementing this system will benefit this university and our students:

1. An electronic Program of Study, available for each student, that captures non-course work related activities
2. Graduate programs and directors will be able to see all of the student information in one place
3. It will be easier to advise students
4. It will be easier for students to see if they have met requirements.
5. It will streamline processes and save time and effort, particularly at the college level.
6. Data integrity – data will be maintained in one system and will not need to be passed through an interface between multiple systems.
7. Interface troubleshooting – currently in Graduate Studies and in Computer Services staff are dedicated to troubleshooting interface errors.
8. Additional functionality available for students in the self-service portal such as ability to plan future course enrollment and access registration functionality from the planner, referred to as the interactive audit.
9. Degree audits could be standardized across all graduate programs for ease of translation.
10. Ability to train non-technical staff to set up and maintain degree audit requirements and components.
11. PeopleSoft provides detailed documentation regarding system functionality and is supported by a team in Computer Services.

Difficulties that will be encountered

- We will have to hire a consultant to help with the implementation, which will take a year to year and a half. We are willing to do this.
- This will require changes at the college level where staff are leery about losing their jobs, since the increased streamlining will make it possible for non-technical people in the departments to certify graduation
- The colleges currently signoff on the diploma – I would want to change this so that the College of Graduate Studies signs.

Who we talked to

Of the schools that we spoke to, most schools that have an advising system in place for graduate students are using PeopleSoft, while very few schools use DARS to advise graduate students.

School	DARS	PeopleSoft	Homegrown
University of Florida			√
Arizona State University		√ with Mod	
North Carolina State		√ with Mod	
Northern Illinois		√	
Florida State University			√
University of Wisconsin, Madison	√		√

University of Southern California	√		√
Florida International University		√	
University of Massachusetts		Under consideration	

Why we are recommending PeopleSoft Advising Module

In considering functionality, resources and support, our research indicates that the PeopleSoft (PS) Advising Module meets the needs of our programs and students more thoroughly than the other options. PeopleSoft offers the ability to bring in both course and non-course requirements for tracking. Non-course requirement tracking is not available in DARS.

Internally, current staff have experience with and understanding of PeopleSoft functionality from a user and back end set up perspective. This provides a basis for ease of understanding and increased ability for cross-training.

Computer Services is better equipped to support the PS Advising Module in both implementation and maintenance. Additionally, supporting documentation provided by PeopleSoft is thorough and easily understood by the functional implementation team.

Below is a summary outlining key functionality requirements and preferences as well as an indicator of the preferred system for each item.

PeopleSoft Advisement versus DARS

Issues	Ranking 1-3(1 high 3 low)	PeopleSoft	DARS	Recommendation
Ease of system	3	Functional friendly good documentation	Technical -lacking in documentation	PeopleSoft
Knowledge of System	1	Will be built by those working in the system	Significant learning curve/technical expertise required from functional staff	PeopleSoft
Centralizing process	1	Easier to implement, requires appx 1 additional staff, culture change	Requires significant staffing (appx 3 additional), culture change	PeopleSoft
Rebuilding programs	3	Will require significant set up	Set up complete	PeopleSoft – to allow for standardization
Interface	1	No interface	Interface issues	PS
Modifications	2	Required	Required	Both
Technical Support	2	Moderate need	High need	PeopleSoft

Available Technical Support	2	High level of support	Low level of support	PeopleSoft
Student View	1	User friendly	Lots of coding	PeopleSoft
College/Program view	1	User friendly	Coding intensive	PeopleSoft
7 Year policy	3	Needs further research	Needs further research	Needs further research
Degree Certification				
Formal Coursework requirement	3	Available	Available	Both
Transfer Work	2	Available	Available	both
Course Substitutions	1	Available	Available	both
Milestones	1	available	Not available	PeopleSoft
GPA	1	Requires MOD	Already available	DARS
6000 level requirement	3	Available	Available	both
College specific requirements	2	Will require MOD's	Available (programs create their own requirements)	DARS

I/N grades	3	Needs further research	Available	Needs further research
C grades	2	Available	Available	both
Earned masters course waivers	1	Needs further research	Available through substitution	Needs further research

In our internal ranking of item importance, our rubric indicates that PeopleSoft provides more of the critical functionality that is needed. For example, PeopleSoft was selected for 7 of the 9 items ranked as most important while DARS was selected for 2 of the items ranked as most important.

Considerations for Implementation

1. Having dedicated staff for implementation
2. Having program director buy in and timely questionnaire responses
3. Having computer services technical support
4. Having registrar timely support for system changes, data clean up and required access
5. Having buy in for culture and process change
6. Having provost communicate his support for implementation

Estimated Timeline

The timeline below outlines a tentative plan for preparation, implementation and go live of the PeopleSoft Academic Advising Module. It is based on input we received from the institutions interviewed (listed above) as well as information gathered from a PeopleSoft consultant. Dates provided below are subject to change based on approval to implement, consultant availability and timely support from internal partners, including graduate program directors, computer services and the registrar's office.

November 2010: Identify and interview potential consultants

December 1, 2010: Select consultant/s

Mid - January 2011: Consultant/s begins

End of January – March 2011: Planning phase

April 2011: Analysis and Design

May – October 2011: Configure and Set up

November – December 2011: Testing

January 2012: Develop training documents and system documentation

February - March 2012: Training of graduate program directors and staff

February – April 2012: Communications to students

Ongoing: Communications to programs throughout timeline

May 2012: Go Live

Resources

We anticipate the need for the following resources to implement the module in the

timeline outlined above.

1. 1 dedicated CS&T programmer
2. 1 additional CGS staff to assist with program set up and maintenance. Possible options are:
   a. Coordinator - $58,353 (salary and benefits)
   b. OPS - $16 per hour for 40 hours per week, approximately $34,000 annually
3. consultant/s - $500,000
4. 3 internal dedicated staff 20%
5. 1 internal staff dedicated 60%

Summary

This proposal serves to illustrate the research conducted and the rationale used to determine the most appropriate advising system to meet UCF graduate program and student needs. After discussions with similar universities, we found that the PeopleSoft Advisement Module provides the most functionality, offers the most opportunity for cross-training (ease of use) and allows for more effective use of internal resources. With this, we recommend the implementation of the PeopleSoft Advising Module as the best long term solution.

APPENDIX J: EFORM FOR EXCEPTIONS ROUTING AND PROCESSING

This is when starting a new eform

ORACLE

Empl
ID:
First Name: Last Name:

eForm ID: 420739

Student Program (major): EDPHD Education PhD

Student Sub-Plan (track), if applicable: PHD-HSPED   Hospitality Educ PhD Trk

Program Action: MATR Matriculation   Student Program/Plan   Run GPS

Requirement Term/Catalog Year: 1400   Fall 2010   Classification: GREG Grad Regular Admission Status

Earliest Admit Term: 1400 Fall 2010   **Expected Graduation Term:**

Email Address: EADTest@ucf.edu

Graduate Plan of Study

A Plan of Study eForm should be on file with the College of Graduate Studies by the end of the second major term of enrollment (based on full-time enrollment).

○ No Changes Needed to the GPS
○ New GPS exceptions needed
○ Revision to existing GPS

Graduate Status Change
☐ This student is in the thesis option
☐ Requirement Term/Catalog Year Changes
☐ Classification Changes
☐ Program/Plan add/change
☐ Student is receiving a "Masters along the way"

Advising Document Attachments

File size limit is 3 MB and only pdf, word, excel and jpg file attachments are allowed.

[Add File Attachment]

Comments
Your Comment:

[   ]   [Submit]   [Hold]

[Save]

152

These are screenshots of each section completed on the eform waiting for approval

ORACLE

Evaluate Graduate Plan of Study

Step 1 of 2: Evaluate Graduate Plan of Study

If the form meets your approval, click Approve. If you want the originator to make changes and resubmit the form, enter an explanatory note and click Recycle. If the form should not be executed, click Deny, which will stop processing of the form.

Enter any relevant comments in the "Your Comment" field to be included with this form.

Current Student Information

Empl
ID: eForm ID: 410043
First Name: Last Name:

Student Program (major): PHPHD Physics PhD

Student Sub-Plan (track), if applicable: PLNETSCIPD   Planetary Sciences PhD Trk

Program Action: MATR Matriculation   Student Program/Plan   Run GPS

Requirement Term/Catalog Year: 1520   Fall 2014   **Classification:**   GREG Grad Regular Admission Status

Earliest Admit Term: 1520 Fall 2014   **Expected Graduation Term:**

Email Address: @knights.ucf.edu

Graduate Plan of Study

A Plan of Study eForm should be on file with the College of Graduate Studies by the end of the second major term of enrollmen: (based on full-time enrollment).

- ○ No Changes Needed to the GPS
- ○ New GPS exceptions needed
- ◉ Revision to existing GPS

Graduate Status Change
- ☑ This student is in the thesis option
- ☑ Requirement Term/Catalog Year Changes
- ☑ Classification Changes
- ☑ Program/Plan add/change
- ☐ Student is receiving a "Masters along the way"

153

Requirement Term/Catalog Year Changes

A graduate petition must be filed by the student if the student wishes to revert to a previous catalog which is earlier than the latest admit term.

Change Requirement Term to: 1520 🔍

Program/Plan add/change

Add/Change Program (major) to: PHMS 🔍 Physics MS

Add/Change Sub-Plan (track) to: PLNETSCIMS 🔍 Planetary Sciences MS Trk

Reason for add/change: Student did not do well in PhD Program

Classification Changes

Change Classification to: Discontinue PhD - Put in Masters ▾

Reason for Change: Student did not pass PhD course

Course Waivers

Personalize | Find | View All | 🔁 | 🔢 First ◀ 1-2 of 2 ▶ Last

	Waiver Type	Institution where course was taken	UCF Course Prefix	UCF Course Number	RQ Line No	Notes		
1	Prev Deg ▾	Rensselaer Ploytechnic Institute			RQ1405.LN30	Transfer 9 credit hours from an earned MS degree	➕	➖
2	Prev Deg ▾	Rensselaer Ploytechnic Institute			RQ1405.LN50	Transfer 15 credit hours from an earned MS degree	➕	➖

External Transfer Work/Course Substitution

Personalize | Find | View All | 🔁 | 🔢 First ◀ 1 of 1 ▶ Last

	*Institution where course was taken	Course Prefix	Course Number	Name of Course	Semester Taken	*Credit Hours	*Hours Accepted	*Grade	UCF Course Prefix	UCF Course Number	RQ Line No	Transfer Scholar		
1	Rensselaer Ploytechnic Institute	SPC	5231	Planetary Atmosphere		3.00	3.00	A	AST	7105	RQ1405.LN10	☐	➕	➖

UCF Course Moves

☑ This student is using coursework from an earned Degree

Personalize | Find | View All | 🔁 | 🔢 First ◀ 1-2 of 2 ▶ Last

	*Course Prefix	*Course Number	*Semester Taken	*Credit Hours	Hours Accepted	Grade	UCF Course Prefix	UCF Course Number	Notes	*RQ Line No	Transfer Scholar		
1	AST	4120	1500	3.00	3.00	A				RQ1405.LN10	☐	➕	➖
2	PHYS	6590	1400	3.00	3.00	A				RQ1405.LN10	☐	➕	➖

Advising Document Attachments

File size limit is 3 MB and only pdf, word, excel and jpg file attachments are allowed.

File Attachments

	Upload	View	Attached File	Doc ID	
1	Upload	View	Program_of_Study_10-29-14.pdf	riverae2014-10-29-16.28.31	Delete

Add File Attachment

Comments

Your Comment:

Comment History:

** Cindy Marie Kelm
** Mon, Nov 3 14, 02:44:23 PM
Waiting on Final Transcript

** Tonya Lavone Walker
** Mon, Nov 3 14, 01:34:10 PM

☐ Complete Checklist

Approve   Deny   Recycle

Hold

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