

Using the New Online Degree Audit Adjustment Routing System

There's a new way for advisers to submit their degree audit adjustments to the college office, and it's integrated into Access Plus.

In this tutorial, we'll cover:

- bringing up the form (for advisers)
- using the form to request changes (for advisers)
- evaluating requests from advisers (for designees)
- processing returned forms (for advisers)
- managing workflow (for everyone)

Please note that some users have had difficulty using this new system with Internet Explorer. If you're having difficulty, you might consider trying Firefox, Chrome, or Opera.

Bringing up the form (for advisers)

You may already be familiar with running a degree audit: in AccessPlus, go to the Faculty/Adviser tab, click on "Advising Services" in the navigation bar, then click on "Degree Audit" in the navigation bar. Enter the student ID in the text box on the left, then hit return. Click "Connect to ISU Degree Audit," then click "Continue" in the window that pops up. Choose the Degree Program you want to run an audit in, then click "Submit a New Audit." Click "Refresh List," then click "Open Audit" next to the audit you'd like to view. This brings up the audit and lets you see which requirements have been met and which still need to be filled.

If any changes need to be made to the student's program (option, catalog, graduation date, etc.) or course requirements, then you'll need to bring up the Degree Audit Adjustment Form for this student. If you've just run a degree audit in DARSweb, go to the Faculty/Adviser tab and then click on "DegreeAuditAdj" in the navigation bar to the left. This will bring up the adjustment form for that student, pre-populated with all the relevant student info. If you haven't just run a degree audit, then there are two ways to bring up the Degree Audit Adjustment Form:

1. Starting in Advising Services, enter the student's ID number and then click on "DegreeAuditAdj" in the navigation bar to the left. This will bring up the adjustment form for that student, pre-populated with all the relevant student info.
2. Starting in Advising Services, type the student's last name first and then click on the "Name Browse" in the navigation bar to the left. This will bring up a list of students. Choose the student you want to submit adjustments for, then click on "DegreeAuditAdj" in the navigation bar to the left. This will bring up the adjustment form for that student, pre-populated with all the relevant student info.

Please note: if you'd like to request changes to the way that DARS is *programmed* for your major (affecting how it looks for ALL students), you'll need to submit changes to the Registrar's office in the usual way.

Using the form to request changes (for advisers)

The first section of the form is used to identify the student and the program you want to make changes to. When the form is pulled up, it should be pre-populated with all pertinent student information such as name, ID, classification, and curriculum info.

If a student has more than one degree program, **you will need to select the program you want to make changes to**. Selecting the incorrect program will result in the entire form being disapproved during the routing process. If you want to make changes to more than one degree program, you will need to submit a form for each.

Program Changes:

The next section, titled “program changes,” is where you can change the student’s option, their catalog, their graduation date, and their adviser. Enter the change you want to make in the “Description” field of the appropriate area.

Don’t forget that students can change their expected graduation date in AccessPlus, and that this is the preferred way to do it if they’ve already applied to graduate.

Course Changes:

This section is where you request changes to the requirements on your student’s audit. Select which “Action” item is needed in the drop down menu and fill in the appropriate fields as needed. Additional course changes are available by clicking on the “+Add more course changes” button.

Here are some examples of the more common types of changes:

- To add a course to a requirement, choose “Add” or “Move” from the drop down menu. Then enter the appropriate information in the “Course,” “Requirement Title / Course,” and “Sub – requirement Number” fields.

Action	Course	Credit	Term Taken	Requirement/ Course Title	Sub-requirement Number	Notes/Comments
Add	chem 1102			math & phys sci	1	replace chem 163 & L

- To waive a course, choose “Waive Course” from the drop down menu. Enter the appropriate information in the “Course,” “Requirement Title / Course,” and “Sub-requirement Number” fields. If you also want to waive the corresponding credit, you can either indicate this in the “Notes / Comments” field or choose “Waive C&C” from the drop down menu instead (see below).

Action	Course	Credit	Term Taken	Requirement/ Course Title	Sub-requirement Number	Notes/Comments
Waive Course	biol 212L			biol & life sci	3	waive 1 cr in area, too

- To waive credits in an area, choose “Waive Credit” from the drop down menu. Enter the appropriate information in the “Credit” and “Requirement / Course Title” fields. If necessary,

add a note of explanation in the “Notes” field.

Action	Course	Credit	Term Taken	Requirement/Course Title	Sub-requirement Number	Notes/Comments
Waive Credit ▾		3		phys sciences		waive 3 crs in area

- To waive both a course and its corresponding credits, choose “Waive C&C” from the drop down menu. Enter the appropriate information in the “Course,” “Credit,” “Requirement / Course

Action	Course	Credit	Term Taken	Requirement/Course Title	Sub-requirement Number	Notes/Comments
Waive C & C ▾	Chem 163L	1		phys sciences	1	

Title,” and “Sub-requirement Number” fields. You can also add a note if desired.

- To dual-list a course (have it fall in two places), choose “Dual” from the drop down menu. Enter the appropriate information in the “Course,” “Requirement / Course Title,” “Sub-requirement Number,” and “Notes / Comments” fields. Put the first place you want the course to go in the “Requirement / Course Title” and “Sub-requirement Number” fields; put the second place you want the course to go in the “Notes / Comments” field.

Action	Course	Credit	Term Taken	Requirement/Course Title	Sub-requirement Number	Notes/Comments
Dual ▾	agron 114			ag sci & econ	4	and in minor

- Finally, to substitute one course for another, choose “Substitute” from the drop down menu. Enter the course that the student took in the “Course” field and the course that is typically required in the “Requirement title / Course” field.

Action	Course	Credit	Term Taken	Requirement/Course Title	Sub-requirement Number	Notes/Comments
Substitute ▾	math 1t16			math 104		

Remember to use ISU course numbers and designators when referring to transfer courses, as otherwise it can be very confusing.

ISUCOMM Foundation Requirement Changes:

Requests involving either English 150 or English 250 **MUST** be made in the ISUComm Foundation Requirement Changes section. Choose either ENGL 150 or 250 and select which English course you want to substitute. If the course isn’t listed in the drop down menu, please write it in the “Notes/Comments” area. Making any changes to this section of the form will cause the form to be routed to the English department for their approval.

Course Requirement	Course Substitution	Notes/Comments
English 150	English 309 ▾	fulfill ISUComm Found. Req. w/ Engl 250 and Engl 309

How this works is as follows: the form will be routed first to English, and then the form will come directly back to the adviser. **This new process will replace the old form.** When an adviser gets the form back from English, he or she will see whether the request was approved or denied; he or she can then edit the form as necessary and click “approve” to send it on to the departmental designee. Note that additional requests can be added (or previous requests can be edited) after getting the form back from English.

Special Changes:

Select the "special changes" you'd like to make by clicking on the "Selected" box to the right of the change, entering any notes or comments in the appropriate box, and attaching any required forms (using the "Attachments" section below). If you run out of room in the corresponding text box, you can use the much larger text box under "Additional Notes and Instructions," below.

Note that some "Special changes" will cause the form to be routed outside of CALS; the "Selected" box needs to be checked in order to ensure that the form is routed appropriately.

Additional Notes and Instructions:

If you have any special instructions for either your departmental designee or the college office, this is where you can put them.

This is also a good place to include a course description (or hyperlink) if requesting that a transfer course be used to meet one of the college requirements. If more information will be needed by either the designee or the college, a syllabus can be attached as described below.

Attachments:

If you want or need to attach any supporting documentation or forms, click on "Attach Document." A new window will pop up. "Browse" for the file you'd like to attach, then click "Import."

Situations where advisers will need or want to attach a file will include:

- Requests involving changes to a minor or certificate.
- Requests to use a transfer course for speech fundamentals or one of the other college requirements (humanities, social sciences, ethics, life sciences, etc.).
- Requests involving a final 32 credit waiver.
- Requests to waive either US Diversity or International Perspectives.
- Requests to use a non-standard ISU course for either US Diversity or International Perspectives.

Note that requests to use a transfer course for either US Diversity or International Perspectives may not be made using the new system. For now, continue submitting these requests in the traditional way.

To view the documents that have been attached, click "View Attachments." At this time, there does not appear to be a way to remove an attached file without starting over, but we'll see if that feature can't be added.

Submit Button:

When you're done with the form and you've entered all the changes you'd like to make, be sure to click "Submit." This is critical. If you forget to click "Submit," the form will go nowhere and all changes will be lost. (Conversely, if you **want** to start over, you can close the tab or hit the back button on your browser, and all changes will be lost.)

After "Submit" has been clicked, a copy of the form will be saved automatically in your Kuali Outbox (more on this later) and the routing process will begin. In most departments, a copy of the form will appear in the Kuali Action List of both the departmental designee and the alternate designee; in

several departments, a copy of the form will appear in the Kuali Action List of the staff of the college office.

Getting Help:

If at any point you get stuck or need clarification, feel free to call Dave Ross (294-2879) or Tim Carey (294-2766). If they can't help, they'll find someone who can. :-)

Evaluating requests from advisers (for designees)

If you are either a departmental designee or alternate designee, then you should get an email notification when an adviser submits a Degree Audit Adjustment Form (DAAF). You can change how often you receive these notifications ("Immediate," "Daily," or "Weekly"), but you should not turn them off entirely (unless you check your Kuali In Basket all the time anyway).

The Kuali In Basket is located in the lower right hand corner of your AccessPlus Home Page (it can also be found under the UBusiness tab). If you have anything in your In Basket (if the number in parentheses isn't "0"), then click on "Kuali Action List" to bring up a list of the forms awaiting your review.

Click on a form to bring it up. What you do with the form will obviously depend on the requests it contains.

- If everything on the form looks okay, go ahead and click "Approve" at the bottom of the page. This will send the form on to the college office.
- If most things look okay, but you're not comfortable with one or two of the requests, then you can click the "Rejected" box next to the request.

Action	Course	Credit	Term Taken	Requirement/Course Title	Sub-requirement Number	Notes/Comments	Rejected
Substitute ▾	Music 102			Math 104			<input checked="" type="checkbox"/>

You can still click "Approve" at the bottom of the form to send it on to the college office, but now the staff there will know not to perform this adjustment.

- If you want to bounce the form back to the adviser so he or she can revise the form and resubmit changes, you can click on "Return to Previous" at the bottom of the page. You should probably add a note to the form first to explain why you're returning it.
- If there's nothing about the form that looks right (it's for the wrong major, it was initiated by the wrong person, all requests have been rejected, etc.), then you can click "Disapprove" at the bottom of the page. This will return the form to its initiator, but the form will not be editable. Instead, he or she will simply get a notification that the form was disapproved.

Q: What happens when someone is both an adviser and a departmental designee? Will they have to approve their own form?

A: It depends on how the department is structured, but yes, in some cases an adviser will have to approve his or her own forms. Please contact the college office if you have questions on this point.

Processing returned forms (for advisers)

Forms will eventually be returned to the adviser. How that form looks when it comes back will depend on what has happened to it at the departmental and college levels.

- If a form is disapproved, its route status is “disapproved” and the action requested is “acknowledge.” Advisers will need to open the form and click “acknowledge” to clear it from their inbox.
- If a form is returned to previous, its route status is “enroute” and the action requested is “approve.” Advisers will need to get into the form, edit it, and then approve the changes in order to resubmit the form. Alternatively, advisers can click “disapprove” to scratch the form and start over.
- If a form is processed with one or more notes or line-item rejects, its route status is “processed” and the action requested is “acknowledge.” Advisers will need to open the form, see what was rejected, and then click “acknowledge” to clear it from their inbox.
- If a form is processed and nothing has been rejected, its route status is “final” and the action requested is “FYI.” Advisers will need to open the form and click “FYI” to clear it from their inbox. (There is also a way to do this in bulk.)

It’s possible to sort these forms by either route status or action requested: just click on the title of the column you’d like to sort by.

It’s also possible to color-code the forms based on their routing status: in the Action List, click on preferences, then scroll down to the area with the colors. It is not, unfortunately, possible to color-code the forms based on the action requested at this time. That feature may be available in the future.

Managing workflow (for everyone)

We’ve already looked at the basics of the workflow system, but there are some tips and tricks that can make everyone’s life a little easier.

If you come across anything that helps you manage your workflow, please send it along to Dave Ross so he can write it up and include it in the list below.

having multiple tabs in AccessPlus:

Typically, when you switch back and forth between tabs in AccessPlus, you have to log in again. This is annoying. In most browsers, you can prevent this from happening by right-clicking on the tab you want to open and choosing “open link in new tab” (or something similar). This opens a new tab in your browser to handle the new tab in AccessPlus. You’ll still need to log in again if you’ve been inactive for 30 minutes, but this trick at least prevents you from having to log in again every time you switch tabs.

filtering your Action List:

If you’re looking for a specific form or type of form, you can filter your Action List by title, route status, or action requested. Just click on filter in the upper right hand corner of the Action List and choose the kind of filter you want. If you want to filter by graduation term, for example, you can type the term you’re looking for in the field next to “Document Title.” Click the filter button, and then only the forms meeting your filter criteria will be displayed.

This can also be done with your outbox.

sorting your Action List:

It's possible to sort the forms in your Action List by any of the included columns: just click on the title of the column you'd like to sort by, and the forms will be sorted using that criterion. If you want to invert the sort order, just click the title of the column again.

color-coding your Action List based on route status:

It's also possible to color-code the forms based on their routing status: in the Action List, click on preferences, then scroll down to the area with the colors. Choose the color you want for each of the different statuses and click "save" at the bottom of the page.

Note that it is also possible to color-code your outbox.

using document search:

There are two types of document searches available in work flow. The first is a basic search and is the default when selecting "doc search" from the tool bar. At the top of the form there is also an option for a detailed search. Keep in mind that the system will look at all the criteria requested and will find the resulting documents meeting **all** of the requested criteria.

Note that you can use a wildcard symbol (*) in place of zero or more characters in the text fields.

Searchable fields in the detailed search include:

- **Document Type:** There are many forms used by the university that are routed through Quali workflow. To search only for documents pertaining to the Degree Audit Adjustment Form you will need to enter the correct type: *DAAF*.
- **Document ID:** If the document ID is known, only this piece of information is needed to complete the search. The document ID number is unique and will never be duplicated.
- **Date fields:** Created From/To, Approved From/To, Last Modified From/To, and Finalized From/To are all date fields and wildcards cannot be used. The more criteria entered under the dates, the tighter the search results become (remember that all criteria must be met).
- **Title:** The DAAF has a formatted title that can also be included in the search. The standard layout of the title field is *DAAF: MAJOR Grad Date LAST, FIRST student ID HONORS*.

Note that it is possible to save a search so that you can run it again at a later time.

changing your email notifications:

To change the type and frequency of email notifications you receive, get into your Action List and click on "preferences." Scroll down to the section titled "email notification preferences" at the bottom of the page. If you choose not to receive notifications of forms requesting an FYI, uncheck that box. If you choose to receive notifications daily, choose that from the dropdown menu. Be sure to click "save" when you are done.

Note: we do NOT recommend turning off email notifications entirely, unless you check your Action List regularly.

tracking forms you've processed:

Say you submitted a form a while ago and want to check on it. Go to your outbox, use the appropriate filter or search to bring up the form you want, and then click the log button to the right of the entry. This will show you exactly where the form is now.

Note that the route status of the form will show in the form listing without having to click on the log.

locking the navigation bar in AccessPlus:

When scrolling down in large pages in A+, the navigation bar will disappear. This, also, can be annoying. Here's how to fix it: go to the Home tab, click on Preferences in the navigation bar, check the box next to "Activate Application Scrollbar," and then choose an Application Frame Height of around 700. You'll have to play with this latter number (depending on your screen size) to get it to behave the way you want, but something between 600 and 800 will likely work. And now, your navigation bar will stay put even when you scroll.

That's it. Again, if you have any questions, comments, or suggestions, please contact either Dave (294-2879) or Tim (294-2766) in the college office.