
Strata Information Group (SIG)

Trip Report

Imperial Valley College DegreeWorks® Consulting Visit

August 30-September 2, 2011

Michael Fox
Senior Executive, Client Services



SIG Consultant

Michael Fox

Overview

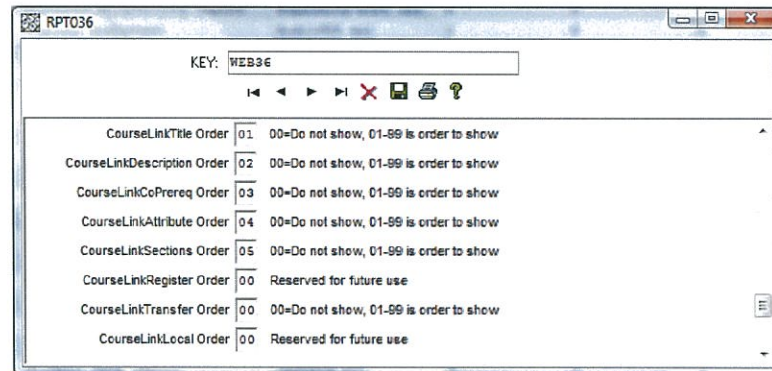
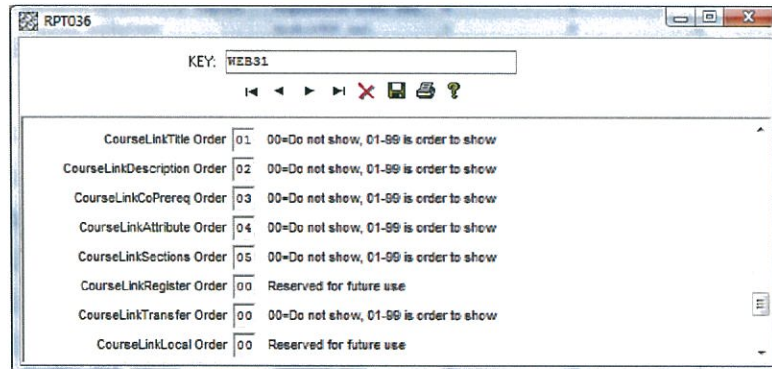
This visit followed SIG's installation of the 4.0.9 version of DegreeWorks®, which replaced the earlier 4.0.2 version that had been in use at the College for several years. Its purposes consisted of the following:

- Validate the installation of 4.0.9 and, where necessary, prep the account for user training
- Review for users new features available in the 4.0.9 release
- Ascertain where the College is in its use of DegreeWorks® and provide recommendations on additional features that can be actuated
- Review the state of existing scribed blocks and, where appropriate, make recommendations on possible revisions
- Review data extract issues, especially course equivalents
- Review possible style sheet changes
- Review Planner options available within DegreeWorks®
- Review the Tomcat versions of SureCode and SHPEnter
- Provide recommendations on moving DegreeWorks® from its limited use on campus (counselors only) to a broader rollout to all faculty, staff, and students

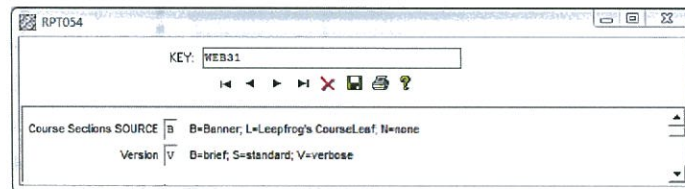
Configuration Settings (SureCode)

UCX RPT036 and RPT050 through RPT054

In order to fully support CourseLink displays from the Student View (WEB31) and Registration Checklist (WEB36) advising worksheets, I set UCX RPT036 entries as follows, ordering the displays as title, course description, co/pre requisites, attributes, and sections:



In addition, I set the UCX RPT050 through RPT054 values for both WEB31 and WEB36 as follows, using Banner[®] as the source and verbose as the formatting option:



In combination, these settings produce displays like the following when users click on subjects and numbers (i.e. HIST 120) in advice for rules currently incomplete:

CFG068 – Course Sequencing

We discussed this new configuration table and the IVC group indicated the College does not enforce course sequencing. As a result, this table should be left blank.

CFG070 – Course Equivalence Table and CFG073 – Cross Listed Courses

See separate item later in this report.

CFG071 – Notes Pick List Table

The College will not be using the Notes features of DegreeWorks® (see separate item in this report relating to SHPEntry). Instead it will continue to create notes in SARS. As a result, I deleted the default entries in this table, leaving only the "000" entry.

CFG071 Description: Note text to show in picklist on Add Note Page Key: 000

Configuration Settings | AUD012 | CFG020 | CFG068 | CFG070 | CFG071 | CFG072 | CFG073 | CFG074 | CFG075 | CFG078 | SYS930 |

Key	Note text	cont'd
000	Choose a predefined note from the list below	

CFG072 – Planner Courses Per Term

As the College ramps up enhanced use of the Planner, it should define in CFG072 those courses with specific offering patterns (i.e. MATH 103 is never during Summer terms). Entries in this table will generate error messages to counselors when they attempt to save plans including courses placed in terms when those courses are defined as NOT OFFERED.

CFG072 Description: Planned courses per term Key: ART101

Configuration Settings | AUD012 | CFG020 | CFG068 | CFG070 | CFG071 | CFG072 | CFG073 | CFG074 | CFG075 | CFG078 | SYS930 |

Key	Term 1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	Message to User
ART101																	Only allowed in Summer terms
CHEM101																	Only allowed in Summer terms
MATH101																	Only allowed in Fall terms
MATH102																	Only offered in the 2009 terms
MATH103																	Not offered in Summer terms
MATH104																	MATH 104 is now offered as MATH 126
MATH126																	Any term but Summer 2010

CFG074 – Reused Course Keys

The College indicated it has reused course keys over time. As such, it should make a list of all such keys and enter each in this table. This table needs to be completed **PRIOR TO RUNNING THE COURSE EQUIVALENT EXTRACT BECAUSE ENTRIES IN THIS TABLE WILL VOID THE CREATION OF REVERSAL RECORDS**, which is a good thing (see page 102 of the *DegreeWorks 4.0.9 SureCode UCX Tables Technical Guide*).

CFG074 Description: Reused course keys Key: ECE34

Configuration Settings | AUD012 | CFG020 | CFG068 | CFG070 | CFG071 | CFG072 | CFG073 | CFG074 | CFG075 | CF

Key	Note
ECE34	

CFG078 – Split Course Keys

If the College has courses that have been split into two or more courses over time, it should record these courses in this table so the parser and auditor engines ignore these entries in the Equivalence Table (CFG070).

CFG078 Description: Split courses (MATH 101 is now MATH 102 and 103) Key: BIOL210

Configuration Settings | AUD012 | CFG020 | CFG068 | CFG070 | CFG071 | CFG072 | CFG073 | CFG074 | CFG075 | CFG076 | SYS930

Key	From Catalog Year	To Catalog Year	Disc1	Num1	Disc2	Num2	Disc3	Num3
BIOL210	2003	2007	BIOL	211	BIOL			

CFG078

KEY: BIOL210

List courses that have been split into multiple courses
 Example 1: MATH 101 (5 cr) is now MATH 102 (2 cr) and 103 (3 cr)
 Example 2: BIOL 200 has been split to BIOL 201 (lecture) and BIOL 201L (lab)
 The credits for each course is found by a lookup on the red-course.mst.
 When a course is found here we ignore the equivalence table.
 The key to this table is simply the course key squashed together
 Example: MATH123 - no spaces

From Catalog Year: 2003 Catalog year range to match against student's catalog year
 To Catalog Year: 2007 - only students within this range will have their class split

Discipline: BIOL Up to 6 courses can be listed
 Number: 211

Discipline: BIOL
 Number: 211L

UCX STU385 – Grade Table

The College reported In Progress grades were being moved to the Insufficient section of advising worksheets.

I checked STU385 and found the IP grade for grade mode "S" was set as follows, with the red arrows indicating where problems were occurring:

STU385

KEY: 00 IP

Numeric Grade: 2000 Numeric Grade in format S#999 (Ex: 4.0 = 4000)

Reserved 1

Graded Attempted: Y=Class is used in GPA Calculation; N=Class is skipped in GPA Calculation

Reserved 2

Reserved 3

Incomplete (TrieQ only): Y=Class is skipped in GPA Calculation; N=Class is used in GPA Calculation

Reserved 4

Use in GPA Calculators (Web): Y=Include in GPA Calculator computation. See also Graded Attempted.

Reserved 5

Banner Override: Y=Obey Override flags below if not blank (Banner extract only)

Override flags: Audit - use this value: Y, N or blank; these values will be used instead of those calculated by the extract

Insufficient - use this value: Y, N or blank

In-progress - use this value: Y, N or blank

Withdraw - use this value: Y, N or blank

Incomplete - use this value: Y, N or blank

Pass - use this value: Y, N or blank

Pass/Fail - use this value: Y, N or blank

Final Grade Number - use this value: 0000 S#999 (Ex: 3.5 = 3500) or blank

I reset these values as follows, which solved the problem and allows IP courses to be applied where they potentially fulfill requirements.

STU385

KEY: 00 IP

Numeric Grade: 0000 Numeric Grade in format S#999 (Ex: 4.0 = 4000)

Reserved 1

Graded Attempted: Y=Class is used in GPA Calculation; N=Class is skipped in GPA Calculation

Reserved 2

Reserved 3

Incomplete (TrieQ only): Y=Class is skipped in GPA Calculation; N=Class is used in GPA Calculation

Reserved 4

Use in GPA Calculators (Web): Y=Include in GPA Calculator computation. See also Graded Attempted.

Reserved 5

Banner Override: Y=Obey Override flags below if not blank (Banner extract only)

Override flags: Audit - use this value: Y, N or blank; these values will be used instead of those calculated by the extract

Insufficient - use this value: Y, N or blank

in-progress - use this value: Y, N or blank

Withdraw - use this value: Y, N or blank

Incomplete - use this value: Y, N or blank

Pass - use this value: Y, N or blank

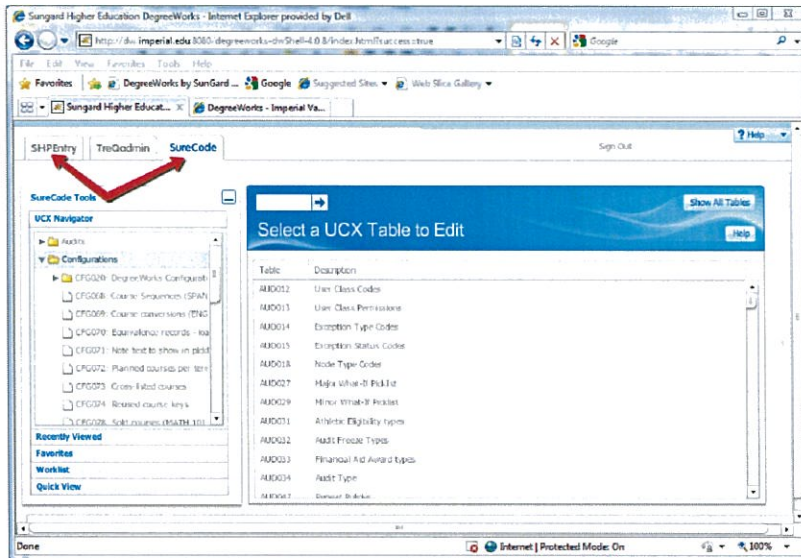
Pass/Fail - use this value: Y, N or blank

Final Grade Number - use this value: 0000 S#999 (Ex: 3.5 = 3500) or blank

Since there are a number of IP grades under a variety of grade modes, similar adjustments should be made to each such grade if numeric grades have been set to "2000" and the following Banner® Override flags have been set to Y - "Insufficient" and "Incomplete".

SureCode and SHPEntry Access Using the Tomcat Server

Access to SureCode and SHPEntry via the Tomcat server is available using the following link - <http://dw.imperial.edu:8080/degreeworks-dwShell-4.0.8/login.jsp>



Non-Degree Applicable Course Work

The College indicated that zero level courses (i.e. any subject code with a "0" as the first digit in its number value) are not degree applicable and should not apply to degree requirements. Such courses were applying to degree requirements because there is no "MaxClasses 0 in @ 0@" header qualifier in any degree block. When I inserted this qualifier into the header of the AS degree block (RA2) and we tested several students, all zero level courses went to Not Counted, which the College indicated is what should be happening.

However, further discussion revealed that not all zero level courses are "not degree applicable" - there are a number of such courses that do apply to selected degrees and/or certificates, which invalidated the header qualifier referenced above. As often happens when discussing academic policy, further exploration of these courses revealed that "0" level courses that are TRULY NOT DEGREE APPLICABLE have a section code of "90" in academic history. All agreed this is consistently coded so I amended the above header qualifier in RA2 to read as follows:

MaxClasses 0 in @ (With DWSection=90)

This statement now moves all non-degree applicable courses to the Not Counted section of advising worksheets.

Not Counted	Unit Applied: 1	Classes Applied: 1
SPST 85 AMERICAN CITIZENSHIP	A 1	Spring 1996
Maximum number of classes exceeded -		

This qualifier is currently only in RA 2 and should be copied and pasted into all other Degree blocks (AA and CERT).

Style Sheet Changes

After reviewing a number of style sheet changes SIG has provided at other customer sites, IVC recommends that its style sheets be altered as follows:

In the header, remove the following labels and reallocate these locations of additional information taken from Banner® (see screen shot below, where each item is marked with a yellow overlay):

- Classification
- Minor
- Advisor
- Level
- College

Student ID	Name	Degree	Major
AA722918			

Level	Undergraduate
Degree	Associate in Science
College	Imperial Valley College
Major	Computer Information Systems
Minor	

The following items need to be added to the header, which will probably morph from its current four columns array to a six column layout. Providing each of these items will require new data from Banner®, meaning the bannerextract.config file will need to be altered using code from BAN080 or by creating custom views.

- Catalog Year
- Academic Standing (literal)
- Holds (all – literals)
- Placement Scores

For this item IVC needs to provide a list of which scores should be extracted, as well as the rules for determining what score will be taken if there are multiples of the same score.

- Prior Degrees Earned at IVC
- Receipt of Transcripts

For this item IVC needs to identify where this data is found and what extract rules should be applied when copying the data from Banner® to DegreeWorks®.

- Multiple GPA's Grouped and Displayed in a Grid Format

For this item IVC needs to identify where each of these data items is stored in Banner®.

- Overall GPA (currently available and displayed)
- Institutional GPA
- Transfer GPA
- Degree Applicable GPA
- CSU GPA
- UC GPA

Multiple Quality Points, Grouped and Displayed in a Grid Format with Respective GPA's

For this item IVC needs to identify where each of these data items is stored in Banner®.

- Overall Quality Points
- Institutional Quality Points
- Transfer Quality Points
- Degree Applicable Quality Points
- CSU Quality Points
- UC Quality Points

Labeling Changes

"Planner" → relabel "Ed Plan"



"Insufficient" → relabel "Insufficient Course Work"

Insufficient				Units Applied: 0	Classes Applied: 30
AME 208	DRAFTING	W	0	Spring 1909	
BUS 18	PRACTICAL ACCOUNTING	W	0	Fall 1914	
BUS 28	BEG. KEYBOARDING	W	0	Fall 1913	

"Fall Through" → relabel "Elective Units"

Fallthrough Courses				Units Applied: 50.5	Classes Applied: 18
BUS 18	PRACTICAL ACCOUNTING	A	3	Fall 1906	
BUS 18	PRIN. OF ACCOUNTING	C	4	Fall 1951	

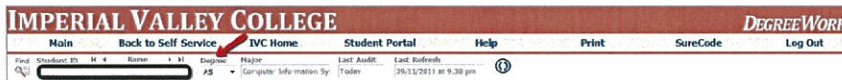
"Not Counted" → relabel "Not Counted Course Work"

Not Counted				Units Applied: 1	Classes Applied: 1
SPST 83	AMERICAN CITIZENSHIP	Maximum number of credits exceeded		A	1 Spring 1996

"Degree Progress" → relabel "Program Progress"



"Degree" → relabel "Program"



Additional Requested Changes

Move a copy of the legend to the left gutter of screen.

IMPERIAL VALLEY COLLEGE **DEGREEWORKS**

Main Back to Self-Service IVC Home Student Portal Help Print SureCode Log Out

Find Student ID: [Name] Degree: AS Major: Computer Information Sys Last Audit: Today Last Refresh: 09/11/2011 at 9:38 pm

Worksheets Planner Petitions Exceptions GPA Calc

Format: Student View View Save as PDF Process New Include in progress classes Class History

Institutional & State Competency Requirements Academic Year: 2004-2005 GPA: 2.365

Math & Reading Competency requirements below may be met by assessment test scores - see a counselor.

AMERICAN INSTITUTIONS REQUIREMENTS

- American Government & Politics POLS 102 American Gov & Politics E 3 Spring 2011
- United States History HIST 17B U.S HISTORY D 3 Spring 1991

HEALTH EDUCATION REQUIREMENTS

- HEALTH EDUCATION REQUIREMENTS HE 1 HEALTH EDUCATION C 3 Fall 1991

PHYSICAL EDUCATION REQUIREMENTS

- Lifetime Exercise Science PE 100 Lifetime Exercise Science B (2) Fall 2011
- Physical Education Activity PE 12AD TENNIS CODED A 1 Spring 1991

MATH COMPETENCY REQUIREMENT

- Reading Competency Met by Assessment Test Score MATH A B 3 Fall 1990

General Education Requirements Academic Year: 2004-2005 Units Required: 18 GPA: 2.850 Units Applied: 25

- English Composition ENG 1A READING & COMPOSITION C 3 Spring 1991
- Communication & Analytical Thinking PHIL 10 LOGIC B 3 Fall 1999
- Natural Science ENVS 5 MAN & HIS ENVIRONMENT C 3 Fall 1990
- Humanities SPAN 20A BILINGUAL SPAN A 5 Fall 1991
- Social and Behavioral Sciences ADS 9 INTRO TO COUNSELING B 3 Fall 1990
- Elective PSYC 1A INTRO TO PSYCHOLOGY C 3 Fall 1999

Major in Computer Information Systems AS Academic Year: 2004-2005 Units Required: 25 GPA: 2.523 Units Applied: 25

REQUIRED COURSES

- Prin of Financial Accounting BUS 1A PRIN OF ACCOUNTING C 4 Spring 1990
- Intro to Information Systems BUS 50 INTRO TO INFORMATION SYST E 3 Fall 1998
- Programming in BASIC BUS 57 PROGRAMMING IN BASIC B 3 Spring 1999

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Move Copy of Legend to This Position

Suppress the display of "Maximum number of classes exceeded;" in the Not Counted portion of advising worksheets.

Not Counted

SPST 85 AMERICAN CITIZENSHIP Maximum number of classes exceeded; Unit Applied: 1 Classes Applied: 1

Strip off the display of GPA's in all blocks, except the Degree block (starting block).

IMPERIAL VALLEY COLLEGE **DEGREEWORKS**

Main Back to Self-Service IVC Home Student Portal Help Print SureCode Log Out

Find Student ID: Alarcon, Jose E Degree: AS Major: Computer Information Sys Last Audit: Today Last Refresh: 09/11/2011 at 9:38 pm

Worksheets Planner Petitions Exceptions GPA Calc

Format: Student View View Save as PDF Process New Include in progress classes Class History

Degree in Associate of Science Academic Year: 2004-2005 Units Required: 60 GPA: 2.878 Units Applied: 105.5

Institutional & State Competency Requirements Academic Year: 2004-2005 GPA: 2.365

Math & Reading Competency requirements below may be met by assessment test scores - see a counselor.

AMERICAN INSTITUTIONS REQUIREMENTS

- American Government & Politics POLS 102 American Gov & Politics B 3 Spring 2011
- United States History HIST 17B U.S HISTORY D 3 Spring 1991

HEALTH EDUCATION REQUIREMENTS

- HEALTH EDUCATION REQUIREMENTS HE 1 HEALTH EDUCATION C 3 Fall 1991

PHYSICAL EDUCATION REQUIREMENTS

- Lifetime Exercise Science PE 100 Lifetime Exercise Science B (2) Fall 2011
- Physical Education Activity PE 12AD TENNIS CODED A 1 Spring 1991

MATH COMPETENCY REQUIREMENT

- Reading Competency Met by Assessment Test Score MATH A B 3 Fall 1990

General Education Requirements Academic Year: 2004-2005 Units Required: 18 GPA: 2.850 Units Applied: 25

- English Composition ENG 1A READING & COMPOSITION C 3 Spring 1991
- Communication & Analytical Thinking PHIL 10 LOGIC B 3 Fall 1999
- Natural Science ENVS 5 MAN & HIS ENVIRONMENT C 3 Fall 1990
- Humanities SPAN 20A BILINGUAL SPAN A 5 Fall 1991
- Social and Behavioral Sciences ADS 9 INTRO TO COUNSELING B 3 Fall 1990
- Elective PSYC 1A INTRO TO PSYCHOLOGY C 3 Fall 1999

Major in Computer Information Systems AS Academic Year: 2004-2005 Units Required: 25 GPA: 2.523 Units Applied: 25

REQUIRED COURSES

- Prin of Financial Accounting BUS 1A PRIN OF ACCOUNTING C 4 Spring 1990
- Intro to Information Systems BUS 50 INTRO TO INFORMATION SYST E 3 Fall 1998
- Programming in BASIC BUS 57 PROGRAMMING IN BASIC B 3 Spring 1999

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Remove the Units progress bar.

Degree Progress

Requirements 72% Units 100%

SIG To Do

Jeff McDaniel will provide an estimate for SIG to provide these services.

Course Equivalence Extract – CFG070 and CFG073

In order to apply old course subject codes and numbers (renamed/renumbered courses) against subject codes and numbers used in currently scribed rules, DegreeWorks® copies (using RAD30, Course Equivalence, or ban 43, \$bannerextract equiv) Banner's® SCREQIV tables into CFG070, Course Equivalence Table, and CFG073, Cross Listed Courses. As we discussed this process and how these equivalencies are used, the College indicated it recognizes its SCREQIV tables have not been consistently maintained over time. The SCREQIV table in Banner® needs to be thoroughly reviewed and update, with the CFG070 and CFG073 tables being built from the Course Equivalency Extract. Unless these tasks are completed, there is significant potential for audit output to be incorrect because the auditor engine, DAP14, will not have the ability to automatically look-up the current values of courses whose subjects and numbers have changed over time.

When I ran the Course Equivalence Extract on September 2, the process yielded the following results. It read 1635 records from SCREQIV, with 1018 records ultimately built in CFG070. The missing 617 records are accounted for as follows:

- 607 were Inactive (check the Inactive in SCBCRKY flag in CFG020BANNER)
- 59 were Reversal records (check Reused Course Keys – CFG074)
- 161 were Duplicate records

```
RAD30JOB log
Bannerextract ===== RAD30JOB Started ===== Fri Sep 2 09:13:44 PDT 2011
DegreeWorks Release = 204.0.9
Bannerextract ===== Working directory = /dw/prod4/admin/logdebug/rad305194 =====
-rw-rw-r-- 1 dwadm dgm 248 Sep 2 09:18 RAD30JOB1

Bannerextract ===== Input Parameters =====
R2R203 Manager,1346678 20560021 DAP
RAD30PODDLEQIV N
Bannerextract ===== End Parameters =====

Bannerextract ===== ExtractMode = EQUIV =====
Bannerextract ===== UseSQLFile = N =====

Bannerextract ===== Extract Mode is EQUIV =====
Bannerextract ===== The IDFILE is =====
Bannerextract ===== Running Banner extract program now =====
Bannerextract ===== RAD30 Starting... ===== Fri Sep 2 09:13:44 PDT 2011
We are only running 1 rad30

----- STARTING RAD30 -----
***-> SCREQIV RECORDS READ ----- 1635 <-----
***-> SCREQIV RECORDS PROCESSED ----- 1635 <-----
***-> SCBCRKY INACTIVE RECORDS ----- SKIPPED ----- 607 <-----
***-> SCBCRKY INACTIVE RECORDS ----- SKIPPED ----- 0 <-----
***-> SCBCRKY CROSS LISTED RECORDS ----- SKIPPED ----- 0 <-----
***-> SCREQIV REVERSAL RECORDS ----- 59 <-----
***-> START TERM > NEW TERM ----- SKIPPED ----- 0 <-----
***-> TOTAL EQUIV RAD BIF RECORDS ----- 1179 <-----
***-> DUPLICATE DAP_EQV_CRS_MST RECORDS ----- 161 <-----
***-> TOTAL DAP_EQV_CRS_MST RECORDS ----- 1018 <-----
----- ENDING RAD30 -----
Bannerextract ===== RAD30 Finished ===== Fri Sep 2 09:13:57 PDT 2011
```

Much of the work of the Course Equivalence extract is controlled by five (5) flags in CFD020BANNER (I have pasted below explanations of each of these flags from the 4.0.9 *SureCode Technical Guide*), working in combinations with entries in CFG074, Reused Course Keys (again, see details pasted below).


For an explanation of how this routine operates, see pages 35-43 of the 4.0.9 *Technical Guide*.

IVC To Do's:


Each of the flags below is taken from CFG020BANNER and dynamically inserted into the extract routine (ban43, which can be launched from a command line - \$bannerextract equiv - or from Transit using RAD 30). As the College reviews the status of its SCREQIV table, it should carefully consider each of these flags, comparing its SCREQIV data entry codes to those referenced in each of these CFG020BANNER settings.

Below each setting, I have pasted a recommended value as a starting point for testing the Course Equivalent extract routine.


Cross List in SCREQIV	1	A Y/N flag. Set to "Y" if cross listed courses are to be filtered out by the ban43 equivalency load program. This means dap_eqv_crs_mst records will NOT be created for cross listed courses. If cross listed courses are not stored in the SCREQIV table at your site then set this flag to "N".
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Cross List in SCREQIV Y=Skip Equivalent if SCBCRKY_TERM_CODE_END all 9's 

Current Course	1	<p>A flag used to indicate how the Banner Equivalency extract (ban43) determines if an OLD SCREQIV Course Key (Subject + Course Number) looked up on the SCBCRSE table with the maximum (MAX) Effective Term is included in the 'Current Course Catalog'. This knowledge is required so that the 'circular' or 'reversal' entries contained in the Banner SCREQIV table (required for Banner registration purposes) can be filtered out and NOT extracted into DegreeWorks. The valid values are:</p> <p>"A" – Look up the SCBCRSE_CSTA_CODE for the OLD Course Key on the STVCSTA table. If the STVCSTA_ACTIVE_IND = "A", the course is considered "Current" and if the OLD Course Key is NOT REUSED (found on BAN070) then the course will be considered a <i>circular</i> or <i>reversal</i> course and will NOT be extracted into DegreeWorks.</p> <p>"C"- The SCBCRSE_CSTA_CODE itself is checked. If it is equal to a "C" then the course is considered "Current" and if the OLD Course Key is NOT REUSED (found on BAN070) then the course will be considered a <i>circular</i> or <i>reversal</i> course and will NOT be extracted into DegreeWorks. The associated STVCSTA_ACTIVE_IND for the "C" STVCSTA_CODE can still be set to "A" for Banner purposes. This setting allows DegreeWorks to identify 'Current' Courses in Banner (as opposed to just looking at the 'Active' Indicator) as courses appear to be 'Active' in Banner when then are really not part of the 'Current Course Catalog' which is what DegreeWorks really needs to know.</p> <p>"K" – The SCBCRKY record is looked up for the OLD course. If the SCBCRKY_TERM_CODE_END is equal to '999999' the course is still Current/Active.</p>
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Current Course A=STVCSTA_ACTIVE_IND of 'A'; C=SCBCRSE_CSTA_CODE of 'C'; K=SCBCRKY End Term 


Inactive in SCBCRKY	1	<p>A Y/N flag. Used by the EQUIV data extract (ban43). The default is "Y" or blank. Set to "Y" or leave blank if "Inactive" records found in the SCBCRKY table for a given SCREQIV New Course Key (SCBCRKY_TERM_CODE_END NOT equal to '999999') are to be skipped and NOT processed as possible course equivalents.</p> <p>Set to "N" if "Inactive" records in the SCBCRKY table for a given SCREQIV New Course Key (SCBCRKY_TERM_CODE_END NOT equal to '999999') are NOT to be skipped and should be evaluated as possible course equivalents. (As of DW4.0.2)</p>
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Inactive in SCBCRKY Y=Skip Inactive Courses in SCBCRKY in EQUIV (End Term NOT all 9's). Default=Y 

Cross List Term	1	<p>A flag that is used to control what SCREQIV term is used to load the UCX-CFG073 Cross- listed Term by the EQUIV extract (ban43). The valid values are:</p> <p>B = Load the UCX-CFG073 Cross-listed Term with BLANKS. Also, loads the UCX-CFG073 With Operator with BLANKS.</p> <p>L = Load the UCX-CFG073 Cross-listed Term with the lower of the two terms: SCREQIV_EFF_TERM or the SCREQIV_START_TERM if the start term does NOT match "000000" and does NOT match the lowest STVTERM. Also, loads the UCX-CFG073 With Operator with ">=".</p> <p>S = Load the UCX-CFG073 Cross-listed Term with the SCREQIV_START_TERM if the start term does NOT match "000000" and does NOT match the lowest STVTERM. Also, loads the UCX-CFG073 With Operator with ">=". This setting is also the DEFAULT if this flag is left blank. (As of DW4.0.2)</p>
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Cross-listed Term S Load CFG073 Cross-listed Term, B=Blanks, L=Lowest Term, S=Start Term 

In-Progress Equiv	1	<p>A Y/N flag. Set to "Y" to tell the Banner student extract (BAN40) to check for an equivalent Course Key match using the dap_eqv_crs_mst when trying to identify In-Progress classes that are repeats of historic/transfer classes that have different Course Keys due to changes in Course Keys over time. The Banner equivalent extract (BAN43) must have been run to load the dap_eqv_crs_mst with equivalencies from the SCREQIV Banner table or CFG070 must be manually updated using SureCode and the dapucx2eqv script run to load the dap_eqv_crs_mst from the CFG070 table after manual changes have been completed.</p> <p>If set to "N" the student extract will continue to <i>only</i> check for <i>exact</i> Course Key matches when trying to identify current classes that are In-Progress repeats of historic/transfer classes. (As of DW4.0.4)</p>
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InProgress Equivalents Y Y=Check for equivalencies in UCX CFG070 to determine if InProgress Repeats. 

UCX-CFG070 Course Equivalence Records

UCX-CFG070 is used by DegreeWorks® to equate course keys which have been changed or obsoleted to current or new course keys. This table can be maintained manually in SureCode or Banner® customers can run RAD30, Course Equivalence, from Transit, or ban 43, \$bannerextract equiv, from a \$ prompt command line).

Records in UCX-CFG070 will not be available for use in DegreeWorks® until they are loaded into the dap_eqv_crs_mst table by ucx12job, which can be run nightly or from Transit, Administration Tasks, ucx12job.

You can also load the UCX-CFG070 records into the dap_eqv_crs_mst table by using the *dapucx2eqv* script which is run from the colon prompt. It is important to consider the implications for your old scribe blocks when making global changes using the UCX-CFG070 table. See the Special Topics section in the DegreeWorks 4.0.9 Technical User Guide (pages 39-43) documentation for more information on loading the dap_eqv_crs_mst table.

UCX-CFG073 Cross Listed Courses

UCX-CFG073 contains the Course Keys (Discipline + Course Numbers) that are considered cross-listed courses. These courses are loaded into UCX-CFG073 in two different ways:

For Banner sites, if the UCX-CFG020BANNER "Cross List in SCREQIV" flag is 'Y' the Equivalency extract (BAN43) performs the following edits to determine if the SCREQIV OLD Course is Cross-listed:

The SCREQIV_END_TERM = '999999'

The OLD SCREQIV_SUBJ_CODE_EQIV and SCREQIV_CRSE_NUMB_EQIV are used to look up the associated SCBCRKY record. The SCBCRKY_TERM_CODE_END must = '999999'.

The NEW SCREQIV_SUBJ_CODE and SCREQIV_CRSE_NUMB are used to look up the associated SCBCRKY record. The SCBCRKY_TERM_CODE_END must = '999999'.

Courses that satisfy all three requirements are considered cross-listed.

If the SCREQIV record is cross-listed, the SCREQIV_SUBJ_CODE_EQIV and SCREQIV_CRSE_NUMB_EQIV are loaded in the UCX-KEY, while the NEW SCREQIV_SUBJ_CODE and SCREQIV_CRSE_NUM are loaded into the UCX-VALUE and written to this UCX-CFG073 table for use later by the parser and auditor.

After making changes to UCX-CFG073 you must reparse your blocks to have them take effect (this is why DAP16 is run **AFTER** the Course Equivalence Extract in your nightly jobs). Each cross-listed record is processed by the parser and the rules are altered on the syntax tree – you will not see these changes in Scribe. The DegreeWorks auditor will use the information in UCX-CFG073 when trying to satisfy requirements for a given student.

CFG074 – Reused Course Keys

The College indicated it has reused course keys over time. As such, it should make a list of all such keys and enter each in this table. This table needs to be completed **PRIOR TO RUNNING THE COURSE EQUIVALENT EXTRACT BECAUSE ENTRIES IN THIS TABLE WILL VOID THE CREATION OF REVERSAL RECORDS**, which is a good thing (see page 102 of the *DegreeWorks 4.0.9 SureCode UCX Tables Technical Guide*).

CFG074	Description:	Reused course keys	Key:	ECE34
Configuration Settings AUD012 CFG020 CFG068 CFG070 CFG071 CFG072 CFG073 CFG074 CFG075 CF				
Key		Note		
▶ ECE34				

Look Ahead

The Look Ahead option under the Worksheets tab is controlled by the SDLOKAHD key, which can be granted using SHPEnter. In addition, Look Ahead can be included as part of What If by setting the following flag to "Y" in the CFG020WHATIF entry in SureCode.

We discussed Look Ahead and its use, with IVC deciding it would like to use the feature. However, in order to allow ease-of-use for students not knowing available subject and number offerings, the College must provide a link to a course search option from the icon. This link currently calls a static file provided by SGHE and the College needs to provide a link to an appropriate file and/or service on the IVC network.

```
<!-- BEGIN CourseCatalog.html -->
<!-- $Id: //Tuxedo/DW4.0_PATCH/Product/webroot/CourseCatalog.html#2 $ -->
```

The screenshot shows the Imperial Valley College DegreeWorks interface. The main window is titled 'IMPERIAL VALLEY COLLEGE' and 'DEGREEWORKS'. It features a navigation bar with links like 'Main', 'Back to Self-Service', 'IVC Home', 'Student Portal', 'Help', 'Print', 'SureCode', and 'Log Out'. The 'Look Ahead' section is active, displaying a form to add courses. A red arrow points from the 'Add Course' button to a separate browser window showing the 'Course Catalog' for PHYS200 (Far Stars). The browser window displays the following course details:

Course ID	Course Name	Under
PHYS100	Near Stars	Under
This is the Near Stars course. It is fun.		
PHYS200	Far Stars	Under
This is the Far Stars course. It is even more fun.		
PSYC0301	Psychology Statistics	Under
This course is very educational.		
See also PSYC300.		
PSYC100	Introduction to Psychology	Under
This course is required by every freshman.		
PSYC300	Social Science Statistics	Under

User Keys

Utilizing the SHPEntry user interface, I set the REG user class Group keys as indicated in the attached Excel spreadsheet. However, in my testing I noticed that the Petitions keys are still being issued, that the financial aid keys are not showing, that the athletic keys are not showing, and that the save audit (Freeze) capabilities are not showing.

IVC To Do's

Jeff, please check to SHPCFG file to assure these keys are not part of either addkey or remkey commands for the REG user class. If they are, then make appropriate changes and retest.

Integrating DegreeWorks® with the IVC Portal

Instructions for integrating DegreeWorks with Luminis (pages 50-58) and Banner® Self-Service (pages 59-64) are outlined in the *DegreeWorks 4.0.9 Banner Considerations Technical Guide*. These instructions, including those relating to single sign on, should be helpful as IVC moves DegreeWorks® under the umbrella of its portal.

Scribing Recommendations for HIST 120 and HIST 121

The College asked me to look at RA235 (OTHER=INSREQS) and RA369 (OTHER=GENED) and to make recommendations regarding HIST 120 and 121. If one or the other is taken, the course can be shared between the social science requirements of GENED and the American Institutions requirement of INSREQS block. However, if both are taken, then one or the other can be used with American Institutions, but not both. To accomplish this request, I altered the blocks in question while on campus using DontShare in RA235. While this worked for the two blocks in question, the DontShare (which is universal, not specific to defined blocks) did not allow HIST 120 and HIST 121 to be Shared with MAJOR blocks.

To get around the above noted DontShare limitation, I reviewed the blocks again after returning home and altered them using slightly different If statements and without using DontShare.

In RA235 I added If statements for both courses, with "DontShare" qualifiers (see yellow highlights below).

```
##Imperial Valley College
##OTHER=INSREQS
##Institutional & State Competency Requirements
##0304-0708
##RA000235

BEGIN

SHAREWITH (MAJOR)
SHAREWITH (OTHER=GENED)

;

REMARK "Math & Reading Competency requirements below may be met by"
REMARK "assessment test scores - see a counselor.";

#####
##American Institutions
#####

If (HIST 120 Was Passed or HIST 120 Is InProgress) Then
  If (HIST 121 Was Passed or HIST 121 Is InProgress) Then
    BeginSub
      1 Class in POLS 102
        Label AI1 "American Government & Politics";
      1 Class in HIST 120, 121
        Label AI2 "United States History";
    EndSub
    Label AI3 "AMERICAN INSTITUTIONS REQUIREMENTS"
  Else
    If (HIST 120 Was Passed or HIST 120 Is InProgress) Then
      BeginSub
        1 Class in POLS 102
          Label AI4 "American Government & Politics";
        1 Class in HIST 120
          Label AI5 "United States History";
      EndSub
      Label AI6 "AMERICAN INSTITUTIONS REQUIREMENTS"
    Else
      If (HIST 121 Was Passed or HIST 121 Is InProgress) Then
        BeginSub
          1 Class in POLS 102
            Label AI7 "American Government & Politics";
          1 Class in HIST 121
            Label AI8 "United States History";
        EndSub
        Label AI9 "AMERICAN INSTITUTIONS REQUIREMENTS"
      Else
        BeginSub
          1 Class in POLS 102
            Label AI10 "American Government & Politics";
          1 Class in HIST 120, 121
            Label AI11 "United States History";
        EndSub
        Label AI12 "AMERICAN INSTITUTIONS REQUIREMENTS";

#####
##Health Education
#####

1 Class in HE 102, 100
```

Label 4 "HEALTH EDUCATION REQUIREMENTS";

##Physical Education
#####

```
BeginSub
  1 Class in PE 100
    Label 5 "Lifetime Exercise Science";
  1 Class in PE 101, 102, 103, 104, 105, 106, 107, 110, 111, 112, 113,
    114, 115, 116, 117, 118, 119, 120, 121, 122, 123, 124,
    125, 126, 127, 128, 129, 130, 131, 132, 140, 141, 142,
    143, 144, 150, 151, 152, 153, 154, 155, 156, 161, 162,
    163, 170, 171, 172, {HIDE PE 15AD}
    Label 6 "Physical Education Activity";
EndSub
  Label 7 "PHYSICAL EDUCATION REQUIREMENTS";
```


##State Competency Requirements
#####

```
If (AMTH>=2006) THEN
  Rule-Complete
    Label 8 "Math Competency Met by Assessment Test Score"
Else
  1 Class in Math 090, 110, 112, 113, 119, 121, 122, 130, 140, 150, 170,
    190, 192, 194, 210, 220, 230, 240, 241, {HIDE MATH 120}
  MinGrade 2.0
  Label 9 "MATH COMPETENCY REQUIREMENT";

If (ARDG=3006 OR DRP>=0064) THEN
  Rule-Complete
    Label 10 "Reading Competency Met by Assessment Test Score"
Else
  1 Class in ENGL 089, 111
  MinGrade 2.0
  Label 11 "READING COMPETENCY REQUIREMENT";
```

END.

////////// Change Log //////////

 Date Who Description
#LOG mm/dd/yy yourname

```
#1 09/06/09 K. Westerfield Chgd beginning year from 0708 to 0304.
#2 09/06/09 K. Westerfield Chgd Credits to Units in Proxy-Advice for MinRes.
#3 09/09/09 K. Westerfield Deleted SHAREWITH Minor & added SHAREWITH (OTHER=
#4 09/09/09 GENED). Added REMARK after Math & Reading Competency section.
#5 09/10/09 K. Westerfield Added > symbol to AMTH score for Math Competency.
#6 09/14/09 K. Westerfield Updated Excel spreadsheet to reflect all chgs
#7 done to this block, including those made before block disappeared after May.
#8 09/22/09 K. Westerfield Deleted MinRes 15 Credits rule - being interpreted
#9 as 15 units are required in this block. Above Label 6: added HIDE PE 15AD.
#10 Label 8: chgd to Math Competency Met by Assessment Test Score. Label 10:
#11 chgd to Reading Competency Met by Assessment Test Score. REMARKs re: Math
#12 & Reading Comp moved to after SHAREWITH so will appear at beginning of
#13 section.
#14 Added option 1 Pols 052 to American Inst 10/20/09 ljc
#15 Added PE 170, 171, & 172 according to 0910 Catalog ja
#16 Added PE 156 according to 1011 catalog 03/11/11 ja
#17 Updated block to reflect AI and MATH changes 06/10/11 ja
### 09/06/11 JAlarcon Mike Fox modified AI to DONT SHARE with other areas.
//////////
```

In RA369 I added similar If statements for both courses, altering the advice for each so that if HIST 120 was used in INSREQS, then HIST 121 is called out in this block and vice versa (see yellow highlights below).

```
##Imperial Valley College
##OTHER=GENED
##General Education Requirements
##1011-9999
##RA000369

BEGIN

18 Credits
  Proxy-Advice "18 units are required.  You currently have <APPLIED>, "
  Proxy-Advice "you still need <NEEDED> more units."

SHAREWITH (MAJOR)
SHAREWITH (OTHER=INSREQS)

;

#####
##Language and Rationality
#####

3 Credits in ENGL 101
  MinGrade 2.0
  Label 1 "English Composition";

3 Credits in BUS 260,
  CIS 101, 202, 212, 214, {HIDE CIS 200, 206,}
  CS 170, 220, 230, 280,
  ENGL 111, 201, 250, 270, {HIDE 240,}
  JRN 100, 101,
  MATH 110, 112, 119, 122, 140, 150, 170, 190, 192,
  {HIDE MATH 120, 124, 130,}
  PHIL 106,
  SPCH 100, 120, 180
  Label 2 "Communication & Analytical Thinking";

#####
##Natural Science
#####

3 Credits in AG 110, 120, 140, 170,
  ANTH 100,
  ASTR 100,
  BIOL 090, 100, 120, 122, 140, 150, 180, 182,
  200, 202, 204, 206, 220,
  CHEM 100, 160, 200,
  ENVS 110, {HIDE ENV_T 100,}
  GEOG 100,
  GEOL 100, 110,
  PHSC 110,
  PHYS 200, {HIDE PHYS 100,}
  PSY 200
  Label 3 "Natural Science";

#####
##Humanities
#####

3 Credits in AMSL 100, 102, 200,
  ART 100, 102, 104, 106,
  ENGL 102, 220, 221, 222, 223, 224, 225, 226, 228, 230,
  {HIDE ENGL 228, 260, 261,}
  FREN 100, 110, 201, 211, 220, 230, 232,
  {HIDE FREN 1A, 1B, 2A, 2B, 201, 211,}
  {HIDE GERM 1, 1A, 1B, 2,}
  HIST 100, 101, 110, 111, 140, 150, 160,
```

```
HUM 100, 226, 230, 262, {HIDE HUM 1A, 1B, 26,}
MUS 100, 102, 104, 200, 202,
    {HIDE 154, 156, 171, 172, 173, 174, 178,}
PHIL 100, 102, 104, {HIDE PHIL 108,}
RELS 100, 104,
SPAN 100, 110, 200, 210, 220, 221, 222, 225, 262,
    {HIDE SPAN 101, 102, 111, 112, 113, 114, 260, 261,}
THEA 100
```

Label 4 "Humanities";

```
#####
##Social and Behavioral Sciences
#####
```

If (HIST 120 Was Passed or HIST 120 Is InProgress) Then

```
3 Credits in HIST 121
    Label SBS1 "Social and Behavioral Sciences"
```

Else

If (HIST 121 Was Passed or HIST 121 Is InProgress) Then

```
3 Credits in HIST 120
    Label SBS2 "Social and Behavioral Sciences"
```

Else

```
3 Credits in AG 160,
    ADS 120, {HIDE ADS 160,}
    AIS 104, 106, 108,
    ANTH 102, 104, 106, 108, 112, {HIDE 110,}
    CDEV 103, 104, {HIDE 220,}
    {HIDE CFCS 108, 240,}
    DSPS 240,
    ECON 101, 102,
    EDUC 240,
    GEOG 102, 108, {HIDE GEOG 104,}
    HIST 100, 101, 110, 111, 120, 121, 130, 131, 132, 140,
        150, 160, 220, 222, 223,
        {HIDE HIST 122, 170,}
    LAS 130, 131, 132,
    POLS 100, 104, 106,
    PSY 101, 104, 120, 142, 144, 146, 202, 204, 206, 208,
    SOC 101, 102, 110, 150, 206, {HIDE SOC 160}
    Label SBS3 "Social and Behavioral Sciences";
```

```
#####
##Elective
#####
```

```
3 Credits in ADS 120, 140, {HIDE ADS 160,}
    AG 110, 120, 140, 160, 170,
    AIS 104, 106, 108,
    AMSL 100, 102, 200,
    ANTH 100, 102, 104, 106, 108, 112, {HIDE 110,}
    ART 100, 102, 104, 106,
    ASTR 100,
    BIOL 090, 100, 120, 122, 140, 150, 180, 182,
        200, 202, 204, 206, 220,
    BUS 260,
    CDEV 103, 104, {HIDE 220,}
    {HIDE CFCS 108, 240,}
    CHEM 100, 160, 200,
    CIS 101, 202, 212, 214, {HIDE CIS 200, 206,}
    CS 170, 220, 230, 280,
    DSPS 240,
    ECON 101, 102,
    EDUC 240,
    ENGL 102, 111, 201, 220, 221, 222, 223, 224, 225, 226, 230,
        250, 270, {HIDE ENGL 228, 240, 260, 261,}
    ENVS 110,
    {HIDE ENV_T 100,}
    FREN 100, 110, 201, 211, 220, 230, 232,
        {HIDE FREN 1A, 1B, 2A, 2B, 200, 210,}
    GEOG 100, 102, 108, {HIDE GEOG 104,}
    GEOL 100, 110,
```

```

{HIDE GERM 1, 1A, 1B, 2,}
HIST 100, 101, 110, 111, 120, 121, 130, 131, 132, 140,
      150, 160, 220, 222, 223, {HIDE HIST 122, 170,}
HUM 100, 230, 262, {HIDE HUM 1A, 1B, 26,}
JRN 100, 101,
LAS 130, 131, 132,
MATH 110, 112, 119, 122, 140, 150, 170, 190, 192,
      {HIDE MATH 120, 124, 130,}
MUS 100, 102, 104, 200, 202,
      {HIDE 154, 156, 171, 172, 173, 174, 178,}
PHIL 100, 102, 104, 106, {HIDE PHIL 108,}
PHSC 110,
PHYS 200, {HIDE PHYS 100,}
POLS 100, 104, 106,
PSY 101, 104, 120, 142, 144, 146, 200, 202, 204, 206, 208,
RELS 100, 104,
SPAN 100, 110, 114, 200, 210, 220, 221, 222, 225, 262,
      {HIDE SPAN 101, 102, 111, 112, 113, 260, 261,}
SPCH 100, 120, 180,
SOC 101, 102, 110, 150, 206, {HIDE SOC 160,}
THEA 100

```

Label 6 "Elective";

END.

```

//////////////////////////////////// Change Log //////////////////////////////////////
      Date      Who      Description
#LOG mm/dd/yy yourname
#1 06/09/11 JAlarcon Created new block for 1011.
#2 06/13/11 JAlarcon In A-1, changed 1 Class for 3 Credits
#3 07/18/11 JAlarcon Include MaxCredits for HIST
#4 09/02/11 MVF      Added If statements for HIST 120/121
#5 09/06/11 JAlarcon GEOG 104 & MATH 130 Terminated

```

IVC To Do

Test these alterations and get back to me with feedback so I can determine if additional changes are required.

Requested Scribe Training

The College asked if it could arrange for additional Scribe training from SIG at some future date.

I passed this request to Jeff McDaniel, who suggested we consider using Paddy Wong, who is a trained scribe and could provide such training as part of one of scheduled monthly visits to the College.

Jeff McDaniel and Jeff Cantwell will discuss the details.

Review of Curriculum Planning Assistant (CPA)

I reviewed the process of building data in the Curriculum Planning Assistant (CPA), recommending the College not activate this process (Results) until it has rolled out the software to students and is very comfortable with its audit results across the entire curriculum. In addition, business practices should be reviewed to insure that as many students as possible have active education plans in place.

Review of Planner Functionality

I reviewed the Planner tab and its functionality, including the following topics:

- I explained the term "Active" plan, which simply identifies the plan among multiple plans that will be copied to the CPA (see item just above).
- I set the CFG020PLANNER "Allow Multiple Active Plans" to "N". College personnel will now have to go back through student records and, in those instances where students currently have multiple active plans, one of those plans will have to be selected as the single "Active" plan. All other plans will need to be set to "Inactive".
- I reviewed the process of designating plans as "Active" or "Inactive".
- I reviewed the various versions of plans, including "Planned vs. Taken".
- I showed the group how to use the "-" symbol to insert courses not offered at IVC into plans.
- I reviewed What If options within the Planner.
- I showed the group what students see when they go into the Planner.

Strata Information Group (SIG)

Trip Report

Banner Student Consulting

For

Imperial Valley College

Week of
September 19, 2011

Patricia Wong
Senior Consultant



Overview / Background

This report summarizes activities and progress during an on-site visit the week of September 19th. The visit focused on several topics including setting up and testing wait listing, testing the final grades and registration pre-check bolt-ons that Terry Loftus has worked on remotely as well as the Argos Profile report. Additionally we spent time on CALB Instructor Drops and baseline drop for non-payment as well as a few other topics.

Findings / Notes

Wait Listing – Wait listing is IVC's priority project for the Spring 2012 semester. They were hoping that Banner wait listing would auto-register students who cleared the wait list. Jeff confirmed with Mike Reid that the process to auto-register students was not available or on their calendar.

Administrative decisions made included:

- The wait list notification period will be 24 hours.
- All settings for Waitlist Error Checking will be fatal. A student will not be allowed to register in one class and wait list for another. Neither will they be allowed to wait list for a class with a time conflict.
- The wait list period will be from the start or registration to the class start date. It will not overlap the add authorization period, which begins with the start of the class.
- A wait list roster is needed for instructors.
 - *Bettsie turned on the summary wait list roster in web tailor, showing on the Faculty tab in TEST8.*
 - *Terry added a wait list roster to the current bolt-on roster.*
 - *Waitlisted courses are showing on the student schedule bill. IVC may ask to have the waitlist priority added to the schedule bill.*
- On the Banner schedule of classes, if a class is closed and there are seats available that can be wait-listed, the "Select" option is blank, without an option for the student to select the class. Something needs to be developed to explain how a student knows that the class can be wait-listed.
- Banner / CALB is using the 1st class meeting for turning off wait-list as well as turning on add authorization codes.

Wait list Set is as follows:

1. Notification letter for students and advisors are configured on
 - a. **STVELMT** – define the module of "F" and the associated view to be used for the waitlist letter. (already defined in Banner as AS_STUDENT_REGISTRATION).
 - b. **GTVLETR** – define the waitlist email "letter"
 - c. **SOAELTL** – letter rules with new module code of "F"
 - d. **SOAELTR** – build the letter. I shared SBCC's letter as an example.
 - e. Automatic notification is performed either online as seats become available or through the **SFRBWLP** batch process.
 - f. I shared Santa Barbara CC's wait list letter as an example.
2. **STVRSTS** – needed to have the waitlist and web indicators checked as well as the status set to "waitlist".
3. **SFARSTS** – needs to have the "WL"waitlist status and periods defined.
4. **SFARMSG** – Customize error messages as needed.

-
5. **SOAWLTC** – Automated Wait List Control Form that provides error checking, verification control, and establishes waitlist rules and priorities as well as to set the automatic notification deadline, letter, and mail host.
 - a. Email server for IVC ismail.imperial.edu.
 - b. Registrar Banner ID is the "From" address for the email.
 6. **SFRBWL** – Batch Waitlist Notification Process – Runs in sleep/wake mode. Must be running in order for notifications to be issued. IVC will need to make sure that this job is running at regularly scheduled intervals.
 7. **SFAWLPR** – Waitlist Priority Management Form – used to view and manage the priorities of waitlisted students by term and CRN who have not yet been notified of available seats in individual courses
 8. **SFIWLNT** - Waitlist Notification Query Form - used to view waitlisted students who have received notification, to check on notification of available seats, assignment of deadlines for registration, and waitlist status.
 9. **SFAXWLP** – Cross List Waitlist Priority Management Form – used to process CRNs that are part of a cross-listed group
 10. **SFARWLP** – Reserved Seats Waitlist Priority Management Form – used to process CRNs with reserved seats
 11. **SFPWLRO** – Waitlist Priority Reorder Process–used to reorder waitlists in batch for all sections that meet institutionally configured selection criteria and specified rules that have been defined on SOAWLTC. Can be launched from any priority management form.
 12. **SOATERM** – In part of term, Must check Faculty Web Waitlist for Faculty to see Waitlisted students using SSB.

Considerations:

- Is there a way to display the student's position on the waitlist on the add/drop page? We also talked about adding the student's wait list position to the schedule bill.
- If a student drops the class, they are still holding the seat thru the notification period.
- If a student clears the waitlist, they are not auto-registered into the section.
- Discussed how nice it would be to issue a text message to students when they clear the waitlist.
- Instructor Rosters – Optimally, the wait list would be a separate option for the instructor to select. In the interest of expediency and cost, we integrated the wait list roster with the regular roster.
- We are looking for more options to display the wait list position to the student.
- Need to set up a "donotreply" to be used for the registrar ID on SOAWLTC.

- Testing scenarios
 - Student going from wait list to eligible to register, confirm email was sent.
 - Student going from eligible to register to expired, next student taking the registration
 - Student expired from the waitlist is "DD" Deleted from SFAREGS and self-service. The DD is noted in SFASTCA.
 - Student can waitlist and drop themselves (DD Delete) from the wait list.
 - Co-requisites are checked at the CRN and course level
 - Student could not waitlist for one section without the other
 - Student must wait list for both, student must register for both
 - Section – double-check the wait list counts
 - Cross-listed classes
 - Student able to re-wait list for a section
 - Test the no notification period
 - Do the registration / error messages make sense? If not, use SFARMSG to adjust

- Test the period where wait list stops and add auth begins
- Instructor Rosters
 - Confirm that expired wait listed students to do not show
 - Confirm that eligible wait list students show
- Schedule Bill – We confirmed that wait listed students show.
- Letter – review the letter to make sure that the information is still current
- Test wait list for cross listed courses. Make sure that the max wait list cap works.

Drop for Non-Payment – IVC is considering implementing drop for non-payment. Currently they put holds on students, requiring them to pay before they can get transcripts or re-register. SFRRNOP goes thru and drops a student from all classes based upon the SFBETRM_AR_IND. The AR Indicator can be set to the values of “N” (no payment received), “C” (Conditional, typically used for Financial Aid and people you don’t want to drop) and “Y” (People for whom payment has been received). SFRRNOP does not consider partial payments, a grace period, or the dollar amount of the balance owed. We ran the baseline Drop for non-payment process, SFRRNOP, in FA8 with the following findings:

- Financial aid, veterans, and BOGG are not flagged as paid or conditional and are showing on the report to be dropped.
- Partial payments do get the AR indicator set.
- Process does not have a grace period.
- Need program to go thru and correctly set the AR indicator prior to running SFRRNOP. I put Jeff in touch with Barry Gillaspie, Pima College Director of Application Development, where they are using SFRRNOP and have developed processes to insure that students do / don’t get dropped as appropriate.

CALB Faculty Drop Rosters (SC_FAC_DROP_ROS) – We tested the setup of the CALB faculty drop rosters. Set-up includes:

- Web Tailor – activate the package, SC_FAC_DROP_ROS
- STVRSTS - Instructor drop statuses of DI and WI were built. The count in enrollment flag MUST be turned off in order for the process to work.
- SFARSTS – The statuses of DI and WI were added to SFARSTS with dates that covered the period needed.
- SVADROP – Instructor drop status column was completed.
- SVARORL – Census roster rules were built for opening day, Census Roster, and W-Grade roster. The settings were as follows:
 - Attendance Type: All Traditional
 - Opening day roster: 0 – 13 adjustment days
 - No-Show cutoff – Last Date for Refund
 - Census day roster: 0 – 7 adjustment days
 - W-Grade roster: -60 to- 0 adjustment days
- SVRROST – Job that can produce a list of un-submitted rosters by drop roster type, part of term
- SVISECH – Section Drop Roster History Form

Considerations:

- IVC has the “count in enrollment” flag set for withdrawals. The W-grade roster will not work if the count in enrollment flag is set. However, unsetting this flag means that students who are withdrawn will be subtracted from the section headcount. Comparisons between the semester we begin this and historical data will be catawampus.
- We discovered was that the “W” grade roster is not auto-assigning a “W” grade when the class is completed. I worked with IVC to prepare a defect report, for submission to SunGard. SunGard was able to replicate the problem and Defect 1-ZEAX56 has been created for it.

Bolt-Ons and Modifications:

Final Grades – Terry changed the final grades enhancement from a modification to the baseline final grades into a bolt-on, thus eliminating problems with having to retrofit the mods into any upgrades. We tested the Final Grades Bolt-on with the following findings:

- For POSATT classes, Matthew provided direction to use the sum of the `ssrmeet_hrs_total` field to determine maximum contact hours.
- Should not allow a “W” grade to be changed.

Terry is continuing to work on this.

Prereg Edit page – We tested the pre-reg edit page with the following findings:

- Address Update - if you select “Type of Address to Insert”, you get an error message when changing the address, related to from and to dates. I recommend removing the “Type of Address to Insert” as an address update option.
- SORLFOS record is not getting changed when the Major / Curriculum (SORLCUR) is changed.

Terry is continuing to work on this.

Wait List Roster – Terry added a waitlist roster to the existing self-service rosters that were installed by SIG as part of the original implementation

- Modify roster to only show waitlist if there are students on it. (Done!)
- Replace “Other Daily Census” with “WAIT LIST”, remove tags Week, Date, Drop Date, Last Attend, Total Hrs, Fin Grade. (DONE!)
- As time permits, Add wait list sequence number, if cross-listed, need cross-list sequence number.

SYOSPROFILE

- Remove the level from the admissions records.
- Add the display of academic, progress and combined standing from SHATERM,
- On transfer institutions line, transcript received, from and to dates are not showing.
- If they exist, add academic, progress, and/or combined standing overrides from SGASTDN.
- New Financial Aid GPA – similar to “TOTAL IVC” cumulative line except:
 - Add transfer units to attempted only.
 - Add excluded (A, B, C, D) grades to Earned units. F grades do not count toward earned.
 - Transfer coursework only - Units attempted for “W” and “NC” grades should be excluded from Units Attempted. (W and NC grades do not count as acceptable grades for transfer work.)
 - Can the FinAid GPA be in the view?
- Patti will complete this in October.

Other Topics:

Equivalents – Decision made to push out the end-term to 999999. If there are still problems, we will look at adjusting the begin term.

- There has been some re-use of the subject and course number done in the 1990’s.
- Jose has been scribing equivalents but not by term.
- Some discussion of moving the start term to Fall 2000, where the course numbering was clean. We will look at this as a 2nd step, if there is still a problem.

SMAPRLE and SOACURR – We reviewed the setup of SMAPRLE, STVMAJR, and SOACURR

- The intent of the SOACURR lock indicator is to enable you to set up a program in advance of its approval. If the record is unlocked, you are not supposed to be able to

assign it to a student. This being said, on custom applications, you would need to confirm how the lock indicator works. The lock indicator on SMAPRLE is supposed to synch up with the lock indicator on SOACURR.

- CIPC Code used for IPEDS
- To inactivate a program, uncheck the web indicator on SMAPRLE. On SOACURR, all modules except academic history should be turned off from the Module Control tab.

Academic Calendar trigger – We tested the trigger for TBA classes. The trigger will not determine the academic calendar days if the attendance method is W or D and there are no meeting days checked. A "TBA" will only compute days for the other attendance accounting methods. The trigger is working as desired.

SVRCALX – confirmed that attendance accounting method IA (Independent Study – Actual Hours of Attendance) was being treated as positive attendance.

Student Goal Data has been collected on SARS. Bettsie has written a program to migrate the SARS data into Banner. The counselors will be entering the matriculation data directly into Banner.

Summer session as one versus 3 terms – Discussed setting up parts of term for additional summer sessions. Determined that Financial Aid would not be impacted but faculty load and MIS reporting definitely would be. Lisa Seals indicated that it was her understanding that the discussion was one term with multiple sessions, not multiple summer terms.

Academic Standing (SHAACST / SHRASTD) – We confirmed that Banner does not put students on academic probation who have withdrawn from all of their classes. It does put them on progress probation and combined standing probation.

Action Items / Follow-up

Next Visit – Nov 7th, 2011

Topics:

- Continue to shake out Wait lists, Faculty Drops, bolt-ons, drop for non-payment.
- Finalize bolt-ons for Final Grades, Pre-reg Edit, and student profile report.
- Spring 2011 Registration begins November 15th
- Equivalentents – review status
- Work with David Poor on Academic Standing including testing SZPSTDN, from Mt. Sac
- Test the baseline Race / Ethnicity survey functionality
- Look into custom self-service messages for student, similar to Financial Aid (ROAMESG).

Strata Information Group (SIG)

Trip Report

DegreeWorks Scribe Training
Banner Student Consulting

For

Imperial Valley College

Week of
March 5, 2012

Patricia Wong
Senior Consultant



Overview / Background

The focus of this visit was on DegreeWorks Scribe training and providing question and answer opportunities as well as working sessions for various student system issues.

Scribe training included Power Point overviews, examples using IVC's DegreeWorks system, hands-on training.

The Q&A session covered several topics. The most significant problem found related to application of payments where enrollment fee exemptions, implemented in Fall 2011, were not taking priority when paying the enrollment fee. I worked with Alfonso Sanchez to test various situations and to work thru to a solution. We also looked for a long-term strategy to prevent problems on an on-going basis. We met with Carlos Fletes, Jan Magno, Lisa Seal, and David Poor to discuss application of payments and problems with the priority hierarchy.

DegreeWorks Scribe Training:

Participants in the DegreeWorks scribe training included Jose Alarcon, Lisa Cross, Gloria Carmona, Alejandro Aguilar, and Alfonso Sanchez. Dixie Krimm and Melody Chronister attended for the overview and running Transit reports.

The agenda included:

- DegreeWorks overview
- How to log into Scribe
- How to set Preferences
- How to use the Templates delivered with Scribe
- How to modify Templates
- How to Search for blocks
- How to create New blocks
- How to Parse blocks
- How to correct Parsing errors
- How to add Tags to blocks
- How to Save blocks
- How to Edit existing blocks using Copy, Paste, Cut
- How to Edit existing blocks and use SaveAs to create new blocks
- How to Delete blocks
- How to Save blocks to the workstation
- How to Edit blocks saved to the workstation
- How to Print blocks
- How to insert TODO's into blocks
- Surecode – what it contains
- How to generate Scribe reports from Transit (SCR02, SCR05, SCR06, SCR07, SCR08, SCR09, and SCR10)
- How to use the "What If" functions of DegreeWorks on the Web to immediately test scribing output.

Additional DegreeWorks Questions and Issues Addressed:

University Studies: The University Studies major requirement includes either the CSU GE or the IGETC certification requirements as part of the major requirements. To accomplish this we tested several options:

- "CopyRulesFrom" specifies a block to be called using an RA number. IVC felt that this was not a good option as the maintenance would be complicated if one block changed for a year and the other did not.
- Block (Major=CSUG) DegreeWorks does not allow you to call a major within a major
- Block (OTHER=CSUGE) requires an "Other" block based upon the major block for CSUG. The call was placed within the major block, enabling the CSUGE block to display after the major requirements. Using the "Other" block rule, IVC was pleased with the solution and the look.

Jose is proceeding with building "Other" blocks for IGETC CSU and IGETC UC.

Registered Nursing major:

- At the department's request, we broke the advice for the Registered Nursing major into semesters by setting up subsets and labeling the subsets by semester.
- We also looked at the optional course, PSY 204, which is recommended for students transferring. To advise the student, we set it up using a proxy statement, thus it is not required, nor does it add into the units to complete the major.

```

If (PSY 204 wasnt Passed or wasnt InProgress) then
  RuleIncomplete
  PROXYADVICE "PSY 204"
  PROXYADVICE "is recommended prior to entering the Nursing Program."
  PROXYADVICE "Students wishing to complete a Bachelor of Science"
  PROXYADVICE "in Nursing program (BSN) may be required to complete"
  PROXYADVICE "such a course prior to transfer to a four-year institution."
  Label 39 "Developmental Psychology-Conception to Death"
Else
  RuleComplete
  Label 40 "PSY 204 was completed for Transfer";

```

ADDITIONAL PROGRAM REQUIREMENT

Oral Communication SP 1 ORAL COMMUNICATION

PSY 204 was completed for Transfer

NURSING REQUIREMENTS: SEMESTER 1

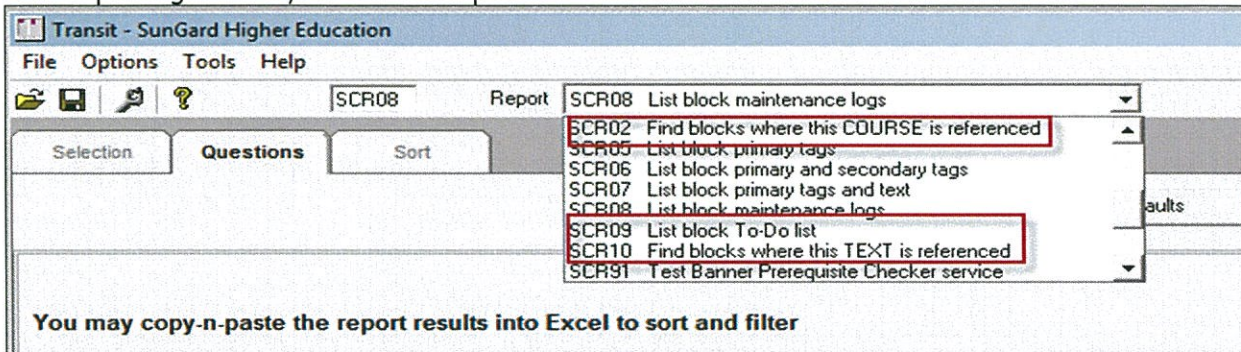
else

Developmental Psychology-Conception to Death **Still Needed:** PSY 204 is recommended prior to entering the Nursing Program. Students wishing to complete a Bachelor of Science in Nursing program (BSN) may be required to complete such a course prior to transfer to a four-year institution.

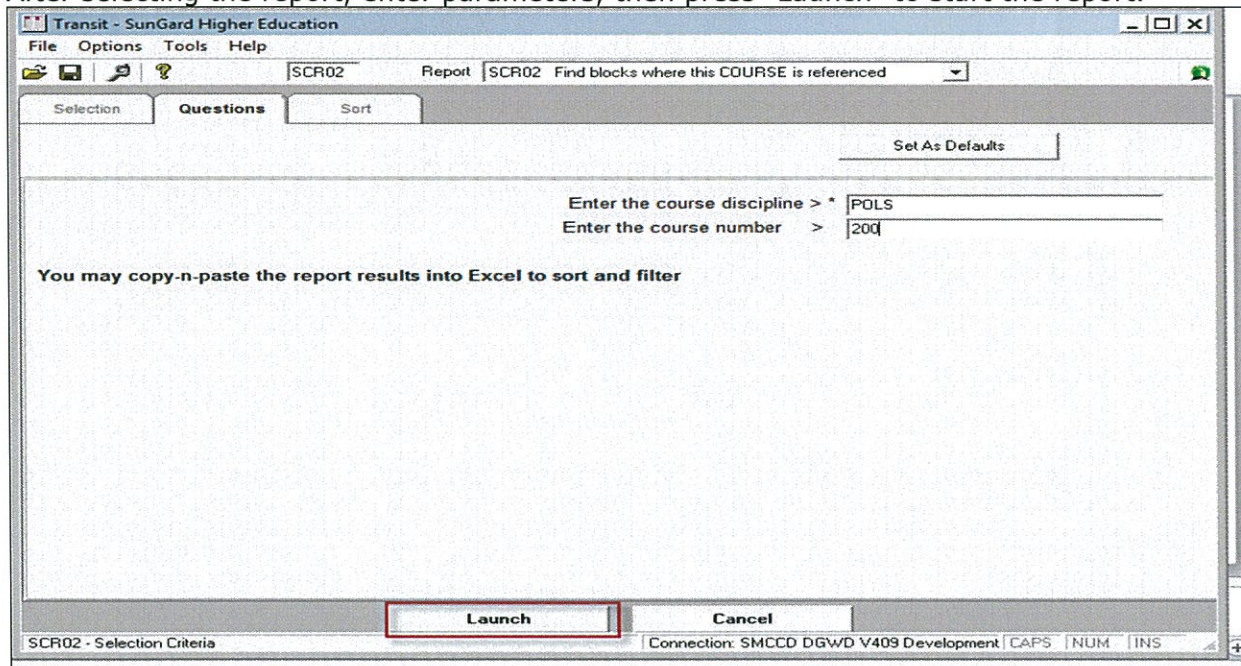
NURSING REQUIREMENTS: SEMESTER 1

Transit reports are available to find scribed blocks where a course or particular text is referenced. At IVC, SCR02 thru SCR10 are not available from the transit drop-down list. These were demonstrated using another school.

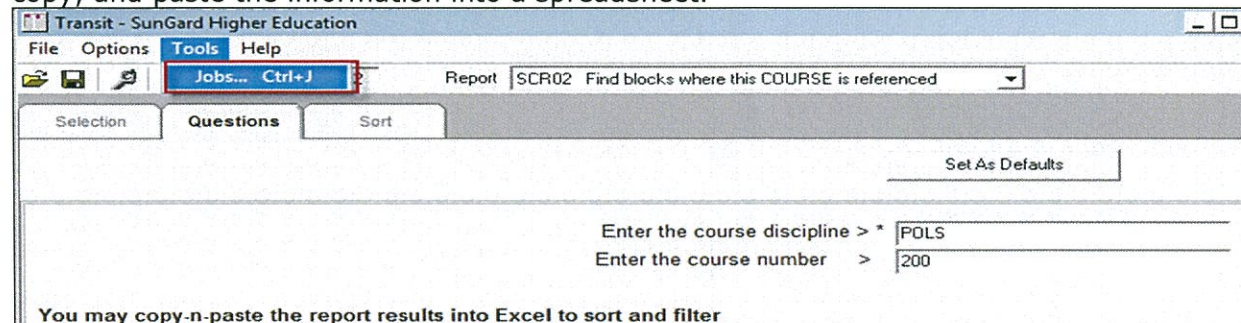
After opening Transit, select the report to be run.



After selecting the report, enter parameters, then press "Launch" to start the report.



To view the output, select "Jobs" from the tools menu. A list of reports and log files will appear. Double-click on the list file. The report output will display. You will be able to select, copy, and paste the information into a spreadsheet.



Hard Returns: Jose is trying to format a remark so it can have bullets and line breaks. SunGard told him to use a "hard return" at the end of a remark to force a remark to go to the next line instead of wrapping. We tested this and found that a "hard return" took us to the next line, which would give a parsing error for not being able to finish the line in progress with a double-quote.

Equivalents: We discussed the problems with Banner equivalents not feeding correctly to DegreeWorks. At IVC, Banner equivalents were set up to be end-termed using the term when the older course was no longer being offered. DegreeWorks is looking at the end-term as the term where the student may have taken the equivalent course. The recommendation is to change the end-term on SCADETL to 999999. This is only problematic if the course and number have been re-used as a course that would not be equivalent or count in course repetitions.

DegreeWorks Planner – We looked at the Banner web page and the student planner, showing how courses can be dragged and dropped from the student worksheet.

Melanie and Dixie asked if there were reports to analyze the data entered in the student planner. Reports to analyze this data have been written using Argos and can be downloaded by IT from the Argos website.

Inactivating a 2nd Program – We discussed how to inactivate a 2nd program / major on SGASTDN so it wouldn't feed to DegreeWorks. Currently, when a student changes from having two majors to a single major, the 2nd major is carrying forward in DegreeWorks. To inactivate the 2nd program, from the curriculum tab on SFAREGS or SGASTDN,

- Press <Update>
- Change activity status to "INACTIVE", press <Save>
- 2nd curriculum no longer shows in DegreeWorks.

Drop-down list for "OTHER" was not showing the new IGETC blocks. By testing, we were able to determine that Scribe would include the IGETC block if there was more than one block.

DegreeWorks 4.10 – We also looked at the file documenting DegreeWorks 4.10 defect resolution.

Student System Topics

Academic Calendar Trigger: Instructional Services is trying to schedule classes that do not meet the normal computations for determining 1st census or the add and drop deadlines. IVC has a custom SSBSECT trigger, IT_SSBSECT_ACCL_DATES, that was developed by SIG in 2004 and then modified last summer to correctly determine the refund date. Unfortunately the trigger is not flexible enough to manage the scheduling situations that IVC is trying to set up. We tried setting up a different part of term than the 1 or 2 expected by the trigger. In testing, we received a trigger error when trying to add the meeting record on SSASECT. To resolve this, I recommend that the trigger be modified so that its logic only applies for parts of term 1 or 2. If other parts of term are entered, then Banner baseline can be used. This will enable the end-user to use other parts of term to manually control the add, drop, and withdrawal deadlines on SSAACCL when a part of term besides 1 or 2 is used.

Drop for Non-payment: IVC indicated that they completed application of payments for Spring 2012 registration by running a process to identify students to be dropped, and then manually processing the drops. There were no exceptions made for to exclude financial aid

students or special populations from being dropped. However a script is needed to ensure that the AR Indicator is correctly set for students who have or have not paid.

For the next registration period, IVC is looking at using the supplemental drop for non-payment processes developed by Pima College (Tucson, AZ) which includes updating the AR Indicator, running the baseline Drop for Non-Payment (SFRRNOP), and subsequent processes to send the student an email.

I also shared a script to update the AR indicator, developed by Roger Waite. Roger's script is very straightforward and would be easy to modify. It would then be followed by the baseline SFRRNOP job to actually drop the student.

IVC will be proceeding with modifying one of these programs to meet their drop for nonpayment needs. They also plan to use the baseline SFRRNOP process instead of dropping students thru INB.

Application of Payments: We identified a problem where cash paid prior to the posting of the student exemption was being applied to the enrollment fee, leaving the exemption with a credit balance. Prior to implementing BOG exemptions, this was not a problem as the rate codes (negative charges) would always apply to the enrollment fee prior to any cash being applied. We identified three issues:

1. An initial clean-up of mis-applied transactions is needed. We tested running TGRUNAP back to Fall 2010, then running application of payments using different parameters.

Findings include:

- TSADETC Priority for a BOG C exemption needs to be changed from 910 to 908, to be consistent with the enrollment fee priority. Because the Enrollment Fee priority was a 908, the BOG C exemption was not paying the enrollment fee.
- Population Selection: TGRUNAP will be run using a population selection. The popsel should look for students who have a transaction on TBRACCD where the source code is R and the balance is negative (this finds dropped classes) or have a transaction with a source code of F, E, or C and the balance is positive.
- TGRUNAP will need to be run for each semester based upon a population select.
- TGRAPPL - The 1st run of application of payments needs to have the parameter, "Apply Title IV first" set to "N". We also set the "Apply Aid to Future Term" and "Apply Other to Future Term" to an "N", ensuring that the Enrollment Fee Exemption will take priority when paying the enrollment fee.
- TGRAPPL - the 2nd run of TGRAPPL can have the Apply Title IV First indicator changed to a "Y". This will allow Pell to apply. We also set the "Apply Other to Future term" to a "Y" enabling credit balances carrying forward from one semester to the next, to apply.

2. Detail code priorities will be reviewed and revised with the following considerations (From SunGard Banner User Guide):

- *Any position that is non-zero in the payment priority must match the charge priority exactly.*
- *Zero in any position is a wild card.*
- *Payment priority of 9999 is used first.*
- *Charge priority of 999 is paid first.*
- *Payment priority of 000 will pay anything. Cash is recommended to be a priority*

Priorities: Sorting for priorities is performed first by credits (payments) and then by charges in the following order:

1. *Priority of payments in descending order*

-
2. *Payment effective date*
 3. *Payment transaction number*
 4. *Priority of the charge in descending order*
 5. *Charge effective date*
 6. *Charge transaction number.*

The corrected detail code priority changes should be made after the TGRUNAP / TGRAPPL / TGRAPPL clean-up runs and before adding the TGRUNAP and TGRAPPL to the nightly processes. I forwarded information to Alfonso which documents the recommended nightly AR processes.

3. Add GLBDATA, TGRUNAP (Unapplication of Payments) and TGRAPPL (Application of Payments) to nightly processes. The tuition exemption is posted thru a nightly batch process, thus the delay where the cash is applied prior. Following the posting the exemption and the 1st run of application of payments, the job TGRUNAP should be run to un-apply the cash from the enrollment fee. A second run of TGRAPPL will apply available based upon priorities, applying the enrollment fee exemption and financial aid before applying cash. I forwarded a spreadsheet of "Daily Processes" to Alfonso for consideration.

Considerations:

- Per Jan, IVC currently has a blanket voucher in place but PELL can only be applied to institutional charges for the current year. Parking permits, library fines, parking fines, are not institutional charges. Institutional charges must be assessed to all students. Title IV as indicated on TSADETC will only pay institutional charges (as indicated on TSADETC).
- Vouchers - Students who use their bookstore vouchers but drop before the disbursement are covered via a portion of the scholarship fund that is set aside to cover bad debts.

Action Items / Follow-up

DegreeWorks Follow-up:

- Transit reports, SCR* are not available from the transit drop-down list.
- Argos must be configured to use the DegreeWorks database prior to running DegreeWorks Planner reports, which can be downloaded from the Argos site.
- Equivalentents – Decision made to push out the end-term to 999999.
 - There has been some re-use of the subject and course number done in the 1990's.
 - Jose has been scribing equivalentents but not by term.
 - Some discussion of moving the start term to Fall 2000, where the course numbering was clean. We will look at this as a 2nd step, if there is still a problem
- Academic Calendar trigger should be modified so that parts of term besides 1 and 2 can be used.

Application of Payments: Alfonso is working with Carlos Fletes to thoroughly test and retest the application of payments recommended changes including the one-time TGRUNAP / TGRAPPL / TGRAPPL runs as well as changing the detail code priorities. In addition the nightly processes should be changed to add GLBDATA, TGRUNAP, and TGRAPPL.

SSBSECT trigger, IT_SSBSECT_ACCL_DATES needs to be modified so that it only applies to classes that are part of term 1 or 2. Any other part of term would revert to Banner baseline, enabling the end-user to manually enter the add, drop, and withdrawal deadlines on SSAACCL.