DegreeWorks Kickoff, Project Launch, and Technical Training

**Purpose**
The purpose of the DegreeWorks Kickoff, Project Launch, and Technical Training is to introduce and examine the DegreeWorks system and its technical components. This examination will include a demonstration of the DegreeWorks system. This training will also include a discussion of the setup, configuration, data extraction, and management of the DegreeWorks system. Finally the examination will include a discussion of best practices, project management, and tools for the DegreeWorks implementation.

**Sessions**
This training will consist of three sessions each utilizing PowerPoint presentations covering the following:

**Functional Introduction**
- Team introductions
- DegreeWorks introduction
- Opportunities, goals, and features of DegreeWorks
- DegreeWorks product components
- Drilling down into a sample audit worksheet
- Discussion of the audit and questions
- General DegreeWorks project management
- Business process and UCX table configuration

**Technical Training**
- Overview of the DegreeWorks data structure and architecture
- The process flow between the DegreeWorks Web interface and the DegreeWorks database and the process flow between the PC Tools and the DegreeWorks database
- Introduction to bridging data and the extraction of data from the student information system (SIS)
- UCX table configurations
- Extraction of data
- DegreeWorks localizations
- Log in authentication paths, setup, and access
- DegreeWorks System management
- DegreeWorks troubleshooting

**Conclusion**
- Best practices of DegreeWorks implementation
- DegreeWorks implementation tools and usages
- Implementation project plan

**Recommended Participants**
The entire DegreeWorks Core Team along with representatives from Information Technology (IT) should be present. These attendees should include the DegreeWorks Project Manager/Coordinator, representatives from IT, and Core Team members who are knowledgeable in the daily usage of the school’s SIS.

**Facilities/Equipment requirements**
The following is required
- Instructor PC connected to a projector
- PC with DegreeWorks PC Tools software installed and tested for access for the trainer
- White board and color markers
Internet access, student system access, system level prompt access to DW server for trainer and IT staff,
Printed agendas for each attendee

---

**Dates**

**Expected duration**
The following is expected per consultant for two consultants (one functional and one technical)

- 16 Hours On Site Training
- 2 Hours Preparation
- 2 Hours Follow-up Report
- 8 Hours Round Trip Travel (as required)

**Learning objectives**

- Meet the DegreeWorks Core Team members and the Ellucian functional and technical consultants
- Understand the DegreeWorks features including web functionality and the PC Tools
- Identify the basic terminology of the DegreeWorks system
- Define the DegreeWorks implementation project management procedures
- Describe the system architecture
- Describe the DegreeWorks process flow
- Define the extract process and describe how this process relates to the SIS configuration
- Understand the configuration settings in the UCX tables
- Set up staff ID files and extract staff data from the SIS into DegreeWorks
- Extract sample student data from the SIS into DegreeWorks
- Describe and discuss nightly SQL extract scripts
- Identify localization requirements of DegreeWorks web pages
- Define and set up DegreeWorks authentication paths
- Describe how access to services is handled in DegreeWorks
- Describe system management requirements including the set up of nightly cron job requirements and the description of log files
- Describe and explain troubleshooting techniques
- Identify best practices in a DegreeWorks implementation
- Identify the DegreeWorks implementation tools

**Post training client Assignments**

- Create and implement the initial large student extract from the SIS into DegreeWorks
- Set up the nightly cron jobs
- Set up the authentication path from your portal into DegreeWorks
- Document all issues related to data extraction
- Document all internal issues and processes that can impact implementation
- Complete other assignments delivered via Trainer and Trip Report
DegreeWorks Implementation Overview, Learning Scribe and SureCode – Begin Requirement Coding Review

Purpose
The objective of this session is to enable the participants to demonstrate, through hands-on exercises, the knowledge and understanding of the DegreeWorks system functional applications and data requirements. This will include using pc applications and the Internet.

Participants will receive full hands on training during this visit. The lecture and hands-on workshop(s) will cover the following:

Sessions

General System Overview/Review
- PowerPoint Overview
- DegreeWorks Terminology
- Minimum Data Requirements
- Review of DegreeWorks on the Web

Scribe Overview (Basic Requirement Coding)
- Introducing Scribe Requirement Coding Fundamentals and Terminology
- Basic Requirement Block Design – Delineating Block header requirements vs. body requirements
- Rule Structure – Learning the course rule layout and proper syntax requirements
- Primary database requirements used for saving and retrieving Blocks for audit use and maintenance
- Introductory Scribe Exercises
- Using Scribe Documentation

Intermediate and Advanced Scribe
- Hands on workshops
- Group rules, if statement rules, with qualifiers, noncourses, cross-listed courses, and equivalent courses
- Check scribing for clarity and user-friendly advice

SureCode (UCX Tables)
- Overview of SureCode
- Components
- Extracted from Banner
- Used in Scribing and Audits
- Evaluation and editing of tables

Demonstrating suggested block review Process
- Best practices for validating blocks with authenticated material
- Basic troubleshooting student data not applying on audit in a way the client would expect
- Block review spreadsheet

Focus on Data and Configuration
- Banner Student Extract
- Scribing and the Audit
- Student data and the Audit
- RAD, DAP and UCX Table review
Web Review Methodology and Tools

- Student Data Report
- Registrars audit
- Diagnostics Audit

Recommended Participants

DegreeWorks Core Team members including representatives from advising, graduation evaluations, IT, Project Manager/Coordinator.

Facilities/Equipment requirements

The following is required

- Instructor pc connected to a projector
- PC with DegreeWorks software installed and tested for access for each attendee
- White board and color markers
- Printed Scribe User Guide for the primary Scribers
- Internet access, student system access, system level prompt access to DW server for trainer and IT staff,
- Copy of authenticated material that was submitted to Ellucian for requirement coding (Full Service Implementations)
- Printed agendas for each attendee

Dates

Expected duration

- 24 Hours On Site Training
- 2 Hours Preparation
- 2 Hours Follow-up Report
- 8 Hours Round Trip Travel (as required)

Learning objectives

- Understand the Implementation Timeline and Milestone dates
- Understand client and consultant responsibilities
- Understand basic navigation techniques of the interfaces introduced
- Ability to interpret and write Scribe requirements
- Ability to Scribe a set of requirements, store them in the database and retrieve them for maintenance
- Understand minimum data requirements for DegreeWorks, flow of student data, and basic troubleshooting of missing audit and advisement data
- Ability to view an audit and identify where specific pieces of data are being retrieved from for display
- Understand primary UCX tables needed for Scribing validation, pick list usage and web display
- Ability to move forward after training with defined review process

Post training client Assignments

- Review existing related policies and procedures (i.e., how program changes are communicated to Scribers from departments, when student data is entered into the student system, etc.) and begin developing new procedures and processes to accompany DegreeWorks as needed
- Make adjustments to Scribe Block requirements as needed during the review process post Session I
- Document all issues related to course requirement coding and web requirement application for follow up by Ellucian
- Document all internal issues and processes that can impact implementation
- Complete other assignments delivered via Trainer and Trip Report
DegreeWorks Implementation Continuation – Defining Customizations, Exception Processing and Other functionality on the Web, Continuation of Web and Scribe Review

**Purpose**

The objective of this session is to introduce additional functionality on the Web, begin building the localization roadmap and requirements of the DegreeWorks system. A strong focus will be placed on an in-depth understanding of student information system data and its relationships to DegreeWorks and the placement of courses in the Degree Audits.

The lecture and hands-on workshop(s) will cover the following:

**Sessions**

**Status and Review of Client Issues**
- Review key discussion topics for Session II that have been designated on the Issues log
- Communicate any new issues for discussion

**Special Student Data Affecting Web Review**
- Equivalent, cross-listed, repeatable, retaken, noncourses and transfer classes
- Multiple majors, Multiple degree
- Special grades, attributes, test scores
- Web review examples – look at audits with special data
- Tools – Registrar’s Audit, Student Data Report, Diagnostics Audit, What If Audits

**Transit Tool**
- Using the interface and understanding selection criteria
- Launching DAP22 manually and printing formatted audits in batch mode
- Launching RAD30
- Printing DAP16 Reports
- Jobs Screen and reviewing standard lists, reports, action files
- Action file email notification process. We will determine who should receive daily notification of the daily audit run (DAP22)
- Scripts – running UCX12Job, Daprestart and Webrestart
- Running and using the Scribe reports
- Extracts – Student, Staff, Advisor, UCX extracts what does it all mean?

**Data Entered via the Web**
- Notes, petitions, exceptions management and exception management
- UCX configuration
- Exceptions practice workshop

**Web localizations**
- Samples
- Modifications
- Custom data
- Advice links
- Colors
- Mock Up
- Arrangement with Ellucian Technical Consultant

**Scribe and Web Review Workshop #2**
Recommended Participants
DegreeWorks Core Team members including representatives from advising, graduation evaluations, IT, Project Manager/Coordinator. A representative from web development should attend the customization discussion. This time can be flexible based on that person’s schedule. Web developers should allow 3-4 hrs for this discussion.

Facilities/Equipment requirements
The following is required
- Instructor pc connected to a projector
- PC with DegreeWorks software installed and tested for access for each attendee
- White board and color markers
- One full copy of printed DegreeWorks documentation
- Internet access, student system access, prompt access to DW server for trainer and IT staff,
- Authenticated material sent to Ellucian for requirement coding
- Printed agendas for each attendee

Dates

Expected duration
24 Hours On Site Training
2 Hours Preparation
2 Hours Follow-up Report
8 Hours Round Trip Travel (as required)

Learning objectives
- Demonstrated ability to Scribe basic and semi-complex requirements, and update existing requirement Blocks
- Demonstrated ability to troubleshoot student data issues and it’s application to course requirements on the Web
- Demonstrated ability to place Exceptions on students and view Exceptions results immediately

Post training client Assignments
- Final responses to questions sent by Ellucian prior to Session I and those identified in Sessions I or II will be sent to Ellucian
- Complete all Scribe Block reviews prior to Session III
- Have 75% of Functional Web review completed by Session III
- Complete other assignments delivered via Trainer and Trip Report
DegreeWorks Implementation Continuation – Moving towards Live status

Purpose

The objective of this session is to set up user access permissions, conduct a “go live” checklist evaluation, and make sure the staff is ready to proceed to rolling out DegreeWorks to the campus community. Web localizations and User Roles set-up will be finalized, sample end to end scenarios will be tested with different user logons, and the cut-over plan of moving from implementation to an installed client will be reviewed.

The lecture and hands-on workshop(s) will cover the following:

Review of Client Issues

- Identify any remaining Go Live issues

Student Educational Planner

- Demonstration of the Student Educational Planner
- Overview, functionality, Look Ahead Audits, and What If scenarios
- Planner view
- Strategies for using the Educational Planner
- Templates
- Mining Planned data
- UCX configuration
- Workshop – Creating planner blocks

User Roles – Services and Assignments to Users

- User Classes
- SHP Data – Services, Groups, and Keys
- SHPCFG.common file – explicit management of keys for user groups
- Discussion on assignment and removal of keys
- Testing all user classes for appropriate services and keys

Dynamic Refresh – Options for automating Banner Student Extract Refresh

Discussion of Roll Out Plan

- Software cut over
- Marketing
- Training and support of users

Maintenance

- Blocks – Maintenance of catalog years, starting new catalogs
- UCX time sensitive flags
- Change Advisor status
- Is student data and audit data updated in batch? If so, how often?
- Are backup processes in place and tested?
- Are nightly refreshes set in cron?

Go Live Check List Evaluation

- Record status or plan on a check list items for scribe, UC, extracts, permissions, web localizations, Web Audits, exceptions, portal, load testing plan, systems tasks, and cutover.
Prioritization of Issues and Service Requests - Introduction to Post-Implementation Add Ons – PowerPoint

- Curriculum Planning Assistant
- Adding Applicants to DegreeWorks
- Financial Aid Audits discussion
- Workflow and DegreeWorks

Client’s Choice Session – Pick a topic

Close Out meeting with client core staff, executive sponsor, Ellucian consultants and project manager

Recommended Participants

DegreeWorks Core Team members including representatives from advising, graduation evaluations, IT, Project Manager/Coordinator.

Facilities/Equipment requirements

- Instructor pc connected to a projector
- PC with DegreeWorks software installed and tested for access for each attendee
- White board and color markers
- One full copy of DegreeWorks documentation accessible electronically
- Internet access, student system access, prompt access to DW server for trainer and IT staff,
- Authenticated material sent to Ellucian for requirement coding
- Printed agendas for each attendee

Dates

Expected duration

24 Hours On Site Training
2 Hours Preparation
2 Hours Follow-up Report
8 Hours Round Trip Travel (as required)

Learning objectives

- Client will demonstrate the ability to manage the Planner and Templates functionality

Post training client Assignments

- Go Live