

uAchieve Guide for Advising

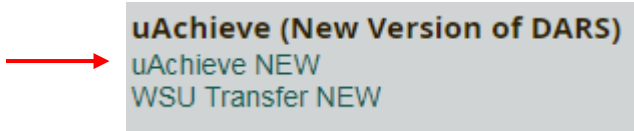
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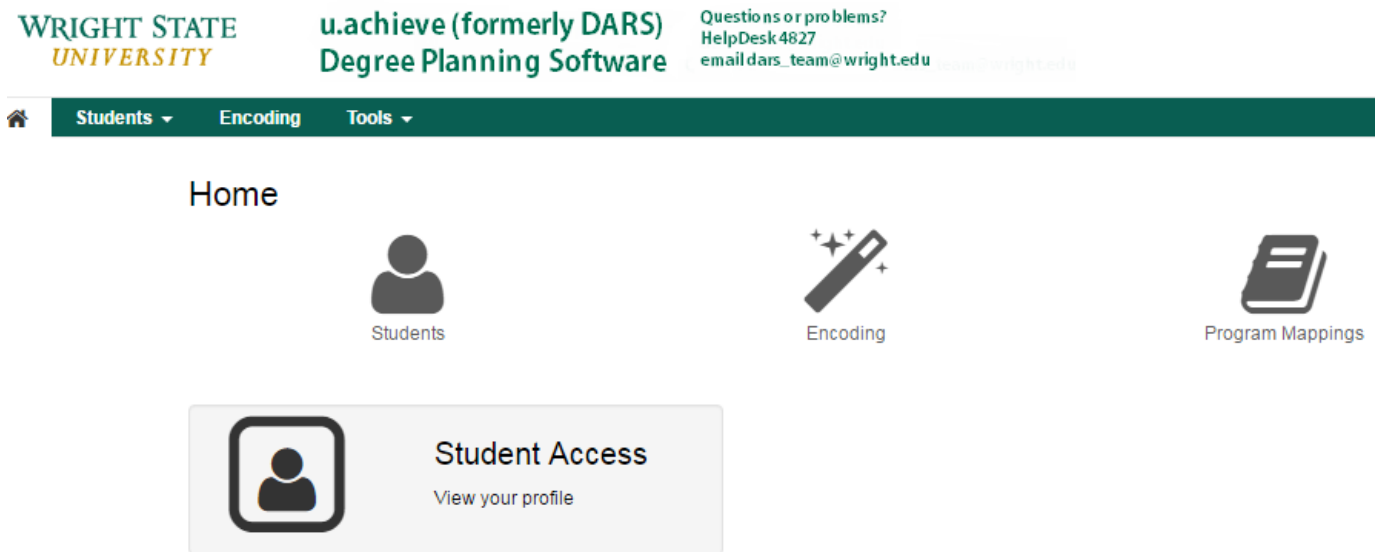
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Logging in to uAchieve

1. Go to <https://wings.wright.edu>
2. Select the uAchieve NEW link under the services tab on the right-hand side.



uAchieve Home Screen



The **Students** button will allow you to open a student record and submit a request for an audit. You can also search for students by name.

The **Encoding** button will allow you to look up transfer articulation rules inside of the uAchieve Database.

We are not currently using the **Program Mappings** button.

Students will only be able to review their audit by selecting the **View Your Profile** under the **Student Access** button.

The uAchieve Degree Audit

Searching for a Student

Select the **Students** button to search for a student by UID or First & Last Name.

- If using the UID, enter the student's UID and press Submit.
- If searching via name, enter the student's name and press search. It will be then that you can select the arrow next to the student's name

Enter Student ID

Student ID


Submit

Search by Student Name

First Name

Last Name

Search ⓘ

Select	Name	Student Id
		

Requesting an Audit

If an audit was created within the past week, it will display after hitting Submit.

Note: As a best practice, running a new audit for a student **every time** you view their record in uAchieve Self-Service is a good idea because it ensures the information is completely up-to-date. See Page 4 for steps to run an audit if an audit already exists.

If no audit has been generated within the past week, you will come to the screen below:

Welcome to u.achieve Self-Service

To run an audit:

1. Fill out the courses in the 'Manage Student' area (optional).

2. Press

Request Audit

 when you complete the courses list.

You need to request an audit before viewing results.

Request Audit

To run an audit, press **Request Audit**. This brings you to the screen below:

Request an Audit

▼ Run Declared Programs:

School	Degree Program	Title	Catalog Year	Marker	Value	Type	CATLYT
	HRMGT-BSB	HUMAN RESOURCES MANAGEMENT	201580	\$MAJOR	MGMT-2ND	D	

► Select a Different Program:

Advanced Settings Click to view available options.

Run Declared Programs

Cancel

Note: If the student has no Degree Program listed, you will need to add it. See Pages 9-10 for detailed instructions on how to add a degree program in uAchieve. You can also run a What-If Audit if the student is interested in several programs or if no program is declared.

If the student already has their declared major listed, you can select **Run Declared Programs**. Keep in mind that doing so will run every declared program listed on the student's record (which may include UC audits). This may take a few minutes.

Requesting an Audit if an Audit Already Exists

If an audit already exists, you will need to run a new one to ensure the validity of the data with which you are working. You can do this by selecting the **Audits** tab then the **Request New** at the top of the page.

Home

Students ▼

Encoding

Tools ▼

Audits ▼

Courses ▼

Transfer Evaluations

Exceptions

Profile ▼

Request an Audit

► Run Declared Programs:

Request New

Manage

Program Matcher

Running a What-If Audit (Select a Different Program)

What-If Audits can also be run on this screen by selecting the **Select a Different Program** tab.

You can then select the College, Program and Catalog Year you wish to run.

Select a Different Program:

Choosing a degree program here will not change your declared degree program.

College:

- ▼

Program:

- ▼

Catalog Year:

- ▼

Note: Selecting a Different Program **does not** change a student's major program.

The Advanced Settings Tab

Advanced Settings [Click to view available options.](#)

Include In Progress Courses	<input checked="" type="checkbox"/>
List All	' - Default ▼
What If Courses	<input type="checkbox"/>
Run Type	D-Degree Audit ▼
Format	Regular (HTML) ▼
Reference	' - Default ▼
Inst ID	' - Default ▼

The Advanced Settings tab includes several options:

Include In Progress Courses: Leave this checked.

Last updated by Justin Ternent 8/14/2017

List All: Automatically set to default. Can be set to list Pseudo Courses or run in Full Listing.

What If Courses: Can be set to include Planned Courses.

Run Type: Do not change this from the default Degree Audit selection.

Format: UAchieve can run audits in HTML (interactive) and PDF (printer-friendly).

Reference: Can use a Reference Audit if student is interested in transferring any credit back to WSU from a local Ohio Institution.

Inst ID: Can select an Institution to run against a Reference Audit.

Viewing an Audit

Once an audit has been run, you can view it by selecting the **View Audit** button.

Completed Audit Requests

These are the audits that have been run in the past for this student's record. Hitting the "Run Audit" button will run a new audit report. Deleting audits removes them from this list.

Run Audit

Delete
select all/select none

ID	Instcd	Program	Catalog Year	Created	Audit Type	Format	Run By	Course Type	View	Delete
10256		HRMGT-BSB	201580	07/18/2016 11:16 AM		HTML		IP	View Audit	<input type="checkbox"/>

Note: An audit that includes In Progress coursework is denoted with the IP under Course Type.

uAchieve Audit Results

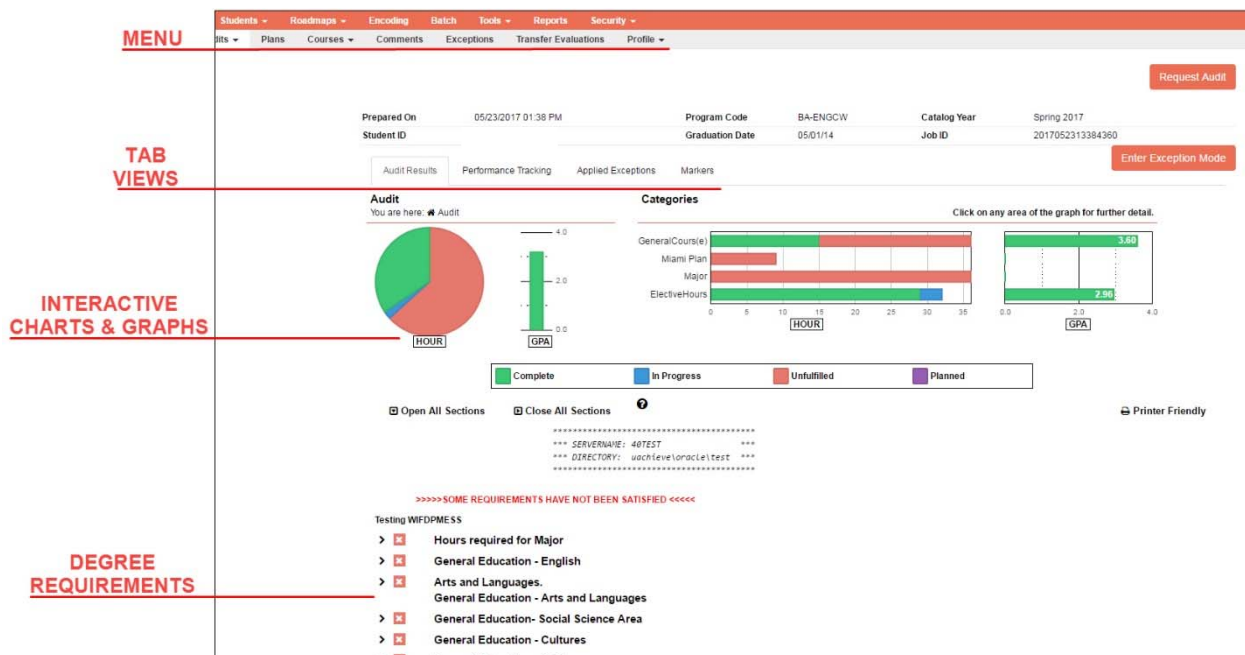
The uAchieve Audit is like the WINGS Express Interactive Audits with some minor differences.

The charts and graphs will still appear as they do in the interactive audits. The charts and graphs can be clicked on for a complete listing of what courses comprise that specific component of the degree.

Note: UAchieve has a new blue color to indicate that a course is in progress. If a segment of the audit is listed in blue, such as this student's Core Requirement, it indicates that the requirement will be completed after successfully passing the in-progress coursework.

Degree Requirements and Sub-Requirements are listed beneath the charts and graphs section and include all requirements needed to earn the degree.

Note: You can read course descriptions and add courses to a student's planner by clicking on the courses. This opens a new window with this information.



Other Tabs within the Audit

The **Course History** tab lists out the student's transfer coursework and coursework completed at WSU. It also graphs the student's term history and term GPAs.

The **Applied Exceptions** tab lists out exceptions that have been made on the student's record.

The **Markers** tab lists out any markers that have been added to the student's record (minors, certificates, etc.).

Exceptions and Exception Mode

In uAchieve, exceptions can be made directly on the audit as opposed to entering in pseudo-names by hand. To enter exceptions from the audit, you must select the **Enter Exception Mode** button on the top right hand corner of the audit.

Upon entering Exception Mode, the charts and graphs will not be available. Only the requirements, sub-requirements, and course lists will be available.

Requirement Exceptions

Requirement Exceptions are the brown boxes next to the requirement. These include **Force Requirement Complete**, **Edit Requirement**, and **Advanced Options**.



Sub-Requirement Exceptions

Sub-Requirement Exceptions are the orange boxes next to the sub-requirement. These include **Force Course**, **Force Sub-Requirement Complete**, **Edit Sub-Requirement**, and **Advanced Exceptions**.



Course and Select-From Line Exceptions

Course and Select-From Line Exception are the green boxes next to the select from line. These include **Add Course (IW)**, **Remove Course (DC)**, and **Swap Courses (SW)**.



Using the Exceptions Tab

Exceptions can also be added manually in uAchieve.

This can be done by selecting the **Exceptions Tab** from the top and then selecting Add Exception.

Note: If the student has any exceptions, they will also appear on this screen.

Exceptions

Exceptions to requirements and subrequirements. Adding or deleting exceptions deletes them from the student's academic record. Text on the exception type list screen

Add Exception

Delete

select all/select none

#	Code	A	R	Course	Rcourse	Audit Note	Pseudo Name	authId	authDate	Edit	Delete
1	IC	R	I				CORE-4		30-JUN-16		
2	IC	R	I				CORE-BUS5A		30-JUN-16		
3	IC	R	I				BA-17EL		30-JUN-16		
4	RM	R	U				S-MC1		30-JUN-16		
5	RM	R	U				WAC-COR1		30-JUN-16		

To create an exception, select **Add Exception**. You can then select from the list of available exceptions, at which point you are directed to a screen to input the exception manually.





Note: We do not recommend using this method of creating exceptions unless absolutely necessary. See Appendix A for more information about Advanced Exceptions.

Description	▲ Exception Code
Requirement Modification - Delete Course	DC
X-Line Modification	EX
Requirement Modification - Insert Course	IC
Requirement Modification - Insert Course to Bypass Condition Code Testing	IW
Add Marker Requirement	MK
Requirement/Sub-Requirement Modification	RM
Add Condition Code to Course	RP
Substitute a Course for a Pseudo-Course	RT
Requirement/Sub-Requirement Waiver	RW
Course Substitution	SC
Requirement Modification - Course Substitution	SS
Requirement Modification - Course Substitution to Bypass Condition Code Testing	SW
Waive Course	WC
Force Complete	WH
Waive Pseudo Course	WP
Add or Remove System Condition Code	WT

Editing and Deleting Exceptions

Exceptions can be edited from the Exceptions Tab by selecting the **Edit** () icon.




Exceptions that are no longer needed can be deleted on the Exceptions Tab by selecting the **Delete Box** and then the green **Delete** icon.

#	Code	A	R	Course	Rcourse	Audit Note	Pseudo Name	authId	authDate	Edit	Delete
1	SS	R	S			PER M NORRIS	CRJ-CR1				
2	SS	R	S			PER M NORRIS	CRJ-FR1				



**For a comprehensive, detailed guide to exceptions,
please see Appendix A: All About Exceptions.**

Transfer Evaluations Tab

The **Transfer Evaluations Tab** lists all transfer coursework that has been evaluated.

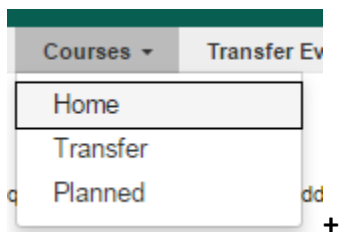
Source Id	Grp	Lock	Certify	Last Modified	Type	Term	Course	Title	Grade	Earned Credit	Condc	Seq	Edit	Del
Columbus State Community College (Semester)														
3261	099	<input checked="" type="checkbox"/>	Soft	05/20/2015 6:31 PM		201480	BIO 0100	Intro to Biology	C	3.00	t	001		
						201480	BIO@1130	Intro to Biology	TC	3.00	tc	001		

The Source ID, GRP, Lock, Certify, and Last Modified categories are not important information for advising purposes.

The type category indicates whether the course is from the transfer institution or a WSU course. The **Arrow** () icon indicates the transfer course, the **Target** () icon indicates the WSU course.

In the above example, the student completed BIO 0100 at Columbus State CC. It transferred to WSU as BIO@1130 (Biology Elective) with a grade of C. The student earned 3 hours of credit.

Courses Tab



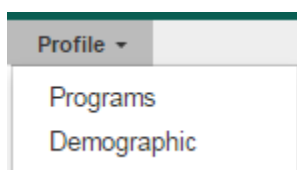
The courses Tab lists all transfer credit work as well, but does not list both the sending and receiving institution information simultaneously.

The **Home** option lists what the transfer courses are at WSU.

The **Transfer** option lists what the course was at the sending institution.

The **Planned** option lists any planned courses the student has added to their record.

Profile Tab: Assigning Degree Programs and Markers



The Profile tab is used to assign a degree program to a student by selecting **Profile** and then **Programs** from the dropdown menu.

Change Academic Program

Adding, editing or deleting a program edits the student's course of study.

Add Degree Program
Delete

select all/select none

^	School	Degree Program	Term	Edit	Delete	Marker	Value	Edit	Del
		CRIMJUST-BA	Fall 2015			Add Marker			

This is where the advisor has the ability to add majors, certificates, and minors.

Selecting **Add Degree Program** will bring you to another screen to select the program you wish to add. The program can be selected from the dropdown menu.

When selecting programs, be sure to include the **Term** (this reflects the major term) and the **Core Catalog Y/T 1** dates as well. The Major Term will be either the current or future term, while the Core Term will be the term in which the student matriculated to WSU.

The **Dpmask** can be left blank since we do not use this function.

Once you have selected the information, press the green **Add** button.

Add Degree Program

Degree Program

ACCTCY-BSB ▼

Term

Summer 2016 ▼

Dpmask

Core Catalog Y/T 1

Memo

Last Modified

By

Add

Cancel

Adding Markers

Minors can be added in to the major audits instead of being run separately in UAchieve. This is done by selecting the **Add Marker** option from the screen above. You will then be able to select the minor from the dropdown menu. Once you have selected the information, press the green **Add** button.

Add Marker

Marker	<input type="text" value="\$MINOR"/>
Value	<input type="text" value="ART HISTORY MINOR"/>
Type	<input type="text" value="List of Req's inserted D"/>
Memo	<input type="text"/>
Last Modified	
By	
<input type="button" value="Add"/> <input type="button" value="Cancel"/>	

Doing this allows the student to only run one audit and see both major and minor requirements.

Transfer Articulation Tables: Encoding Button

Transfer Articulation

The Encoding Button is where you can look to see transfer articulation information.

To lookup an institution, you can search by typing the school's name in the entry field. This field is case sensitive.

Transfer Articulation

[+ Add New School](#)

School Name	Source ID	IREF	Transfer	View	Delete
Sinclair Community College (Quarter) Rename	3332	2	2		

Note: Ignore if a school says Quarter or Semester. UAchieve only displays the first table it finds.

To select an institution, press the **Folder Icon** () under the View category.

This will open up the Institutional Reference and Transfer Articulation Tables for viewing:

Transfer Articulation
Sinclair Community College (Quarter) Source ID: 3332 [Return to list](#)

Institutional Reference Tables [+ Add IREF Table](#)

Name	Source ID	Source CD	FYT	LYT	Clone	Edit	Delete
Sinclair Community College (Quarter)	3332		000000	201240			
Sinclair Community College (Semester)	3332		201280	999999			

Transfer Articulation Table [+ Add TA Table](#)

Name	Source ID	Source CD	DPMask	FYT	LYT	Clone	Edit	Delete
Sinclair Community College (Quarter)	3332			000000	201240			
Sinclair Community College (Semester)	3332			201280	999999			

Note: For advising purposes, you will likely not use the Institutional Reference Tables.

Viewing Transfer Articulation Rules

To see what is encoded in uAchieve, select the Edit button next to the Transfer Articulation table you wish to view. This will generate a new page where you can select **Segments** and then select the View Rules Icon under the segment you wish to review.

Example: I want to determine if we have a rule for Sinclair's ACC 1210 course. To do this, I select the **Segments Tab** and then scroll down to the **ACC Segment**. I then click on the **View Rule** box to see what rules are encoded. I can then see all rules encoded for ACC coursework from Sinclair. I can see that ACC 1210 is equivalent to WSU's ACC 2010. You can also see any public/private memos regarding the transfer rule (who approved the course, additional information, etc.).

Transfer Segment Table

General Default Tables Segments Edit Rules						
+ Add Row						
#	Segment Name	Segment Hint	Description	Details	Edit	Delete
1	AA			...		
2	ACC			...		

Transfer Rule Table

ACC -

Add new rule to this segment at line [+ Add](#)

▼ Rule 1 Control Area
 Delete Rule

Rule #	Segment	Cond	Min Ct	Min Hrs	Ctl Cd	Accept	Reject	Hide from Transferology & Reference Audits
1	ACC -		0	0				<input type="checkbox"/>

Public Memo

Private Memo

▼ Transfer/Source Courses
Add source course at line [+ Add](#)

	Course ?	P	Title	T	Min Hours	AC	RC	Effective Year/Term Range	Details	Delete
1	ACC 1210		Intro to Financial Accounting	<input type="checkbox"/>	0			-	...	

AA**X999*

▼ Home/Target Courses
Add target course at line [+ Add](#)

	Course ?	P	Title	Hours	F	Hide	Alternate Courses	Course Flags	Details	Delete
1	ACC 2010			0	<input type="checkbox"/>	<input type="checkbox"/>			...	

A****999**

If you need to review additional rules, you can select the Segment from the dropdown menu above the current dataset.

Contact Information for Questions

Thank you for taking the time to read this document. We sincerely hope it helps with your understanding of UAchieve.

If you are ever in need of assistance or additional training, do not hesitate to contact us for help!

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Appendix A: All About Exceptions

Exceptions are used to alter a student's degree audit. This appendix details how to use exceptions in uAchieve's Exception Mode.

***** ALWAYS RUN A NEW AUDIT BEFORE MAKING EXCEPTIONS *****

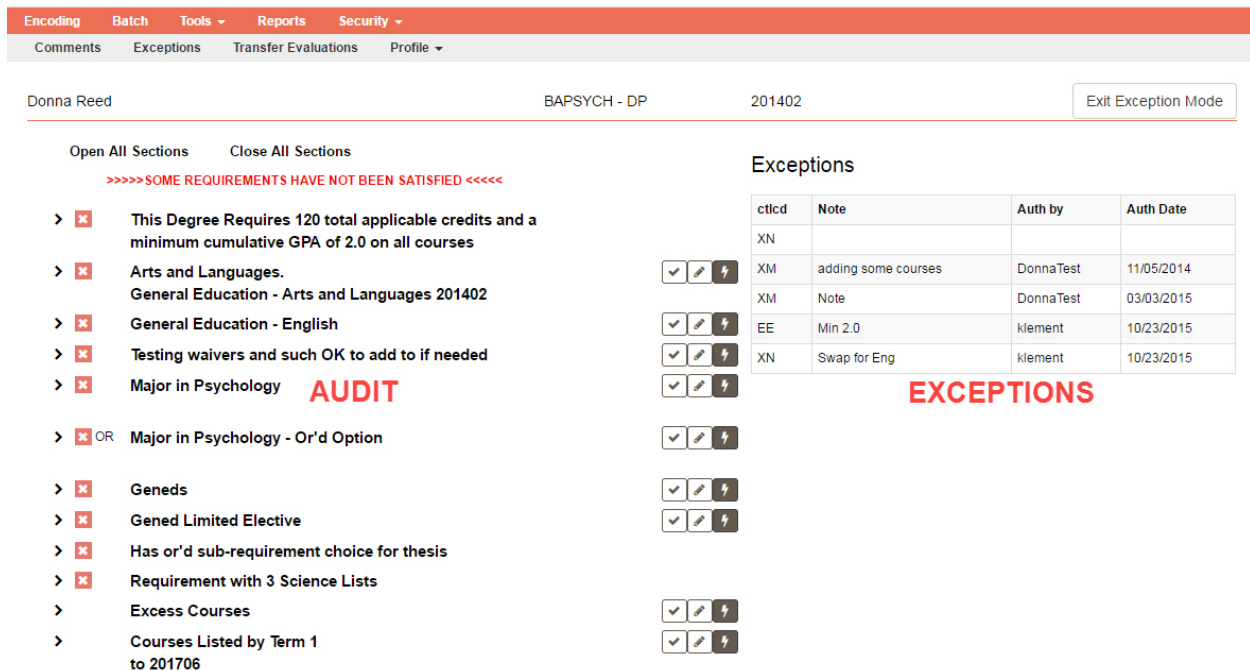
Entering Exception Mode

After running an audit, Click the **Enter Exception Mode** () button on the top right-hand corner of the audit.

The Exception Mode screen consists of two areas

1. The left side of the screen is the Audit area
2. The right side is the Exceptions area

Exception buttons are aligned down the center:



Donna Reed BAPSYCH - DP 201402 Exit Exception Mode

Open All Sections Close All Sections

>>>>SOME REQUIREMENTS HAVE NOT BEEN SATISFIED<<<<

> ☒ This Degree Requires 120 total applicable credits and a minimum cumulative GPA of 2.0 on all courses

> ☒ Arts and Languages.
General Education - Arts and Languages 201402

> ☒ General Education - English

> ☒ Testing waivers and such OK to add to if needed

> ☒ Major in Psychology **AUDIT**

> ☒ OR Major in Psychology - Or'd Option

> ☒ Geneds

> ☒ Gened Limited Elective

> ☒ Has or'd sub-requirement choice for thesis

> ☒ Requirement with 3 Science Lists

> Excess Courses

> Courses Listed by Term 1 to 201706











Exceptions

ctid	Note	Auth by	Auth Date
XN			
XM	adding some courses	DonnaTest	11/05/2014
XM	Note	DonnaTest	03/03/2015
EE	Min 2.0	klement	10/23/2015
XN	Swap for Eng	klement	10/23/2015

EXCEPTIONS

Exception Buttons

Exceptions are color-coded to the level of the audit applied:

Audit Level	Color	Button	Description
Requirement	Brown		Force Requirement Complete
			Edit Requirement
			Advanced Exceptions
Sub-requirement	Orange		Force Course
			Force Sub-Requirement Complete
			Edit Sub-Requirement
			Advanced Options
Course ("Select From" Line)	Green		Add Course
			Remove Course
			Swap Course

To create an exception, select one of the Exception Buttons. You will then be directed to a separate screen to input the exception details. As soon as an exception is saved, it immediately affects the student record and appears in the uAchieve Self-Service Client.

The six unique exception types available in Exception Mode are detailed below.

Requirement Level Exceptions

<input checked="" type="checkbox"/> Force Requirement Complete	
<div> <p>Requirement Force Complete Exception</p> <p>Requirement General Education - Arts and Languages 201402</p> <p>1. Verify & Save</p> <p>This Exception will force the current Requirement to Completion.</p> <p><input checked="" type="checkbox"/> Restrict to this Degree Program.</p> <p>Audit Note Force Requirement / Sub-req (Maximum characters: 27)</p> <p>Memo Force Requirement / Sub-requirement Memo (Maximum characters: 255)</p> <p>Authorized by superuser (Maximum characters: 30)</p> <p>Date 05/26/2017</p> <p> <input type="button" value="Save & Run Audit"/> <input type="button" value="Save & Add Exception"/> <input type="button" value="Cancel"/> </p> </div>	<p>Tab 1. Force Requirement Complete</p> <ul style="list-style-type: none"> • May check option to "Restrict to This Degree Program" (unchecked by default) • Complete fields for Audit Note, Memo, Authorized By, and Date (or use the default text) • Action buttons: <ul style="list-style-type: none"> ○ Save & Run Audit ○ Save & Add Exception ○ Cancel <p>Exceptions made will not be reflected on the audit until a new audit is run.</p> <ul style="list-style-type: none"> ○ Note that the Authorized by and Date fields are autopopulated.

- Forcing a requirement complete will remove any courses currently residing in the sub-requirement. These will then place anywhere else in the audit where they can possibly match. Be sure to verify that the audit looks correct after doing this type of exception.

Edit Requirement

Requirement

Test for Home/Self-Articulation

1. Requirement Modification

2. Verify & Save

Required Sub-requirements

Original Value: 1

Adjust by: - 1 +

Required Course Count

Original Value: 0

Adjust by: - 1 +

Required Hours

Original Value: 0.00000

Adjust by: - 0.00 +

Required GPA

Original Value: 0.00000

Adjust by: - 0.00 +

Next

Cancel

Tab 1. Requirement Modification

- Make edits to the Requirement by adjusting up (+) or down (-) incrementally from the default value of zero:
 - Required Sub-Requirements
 - Required Course Count
 - Required Hours
 - Required GPA
- Any edits away from default values render an action button:
 - Next**
 - Cancel**

Requirement Modification Exception

Requirement

General Education - Arts and Languages 201402

1. Requirement Modification

2. Verify & Save

Required Sub-requirements

Original Value: 3

Adjust by: 1

Required Course Count

Original Value: 0

Adjust by: 0

Required Hours

Original Value: 0

Adjust by: 0.00

Required GPA

Original Value: 0

Adjust by: 0.00

☒ Restrict to this Degree Program
☒ Restrict to this Requirement.

Audit Note

Edit Requirement / Sub-req

(Maximum characters: 27)

Memo

Edit Requirement / Sub-requirement Memo

(Maximum characters: 255)

Authorized by

superuser

(Maximum characters: 30)

Date

05/26/2017

Back

Save & Run Audit

Save & Add Exception

Cancel


Tab 2. Verify & Save

- Review edits made on Tab 1
- May check option to Restrict to This Degree Program and/or Restrict to This Requirement.
- Complete fields for Audit Note, Memo.
- Action buttons:
 - Back**
 - Save & Run Audit**
 - Save & Add Exception**
 - Cancel**

Exceptions made will not be reflected on the audit until a new audit is run.

Note that the **Authorized by** and **Date** fields are autopopulated.

Sub-Requirement Exceptions

<div>  Force Course </div>	
<div> <div>Force Course Exception</div> <div>Subrequirement</div> <div>English</div> <div> <div>1. Force Course</div> <div>2. Verify & Save</div> </div> <div> <div>200110</div> <div>ENGL400</div> <div>(3 Hours) A</div> <div>+</div> </div> <div> <div>ENGL111</div> <div>(3 Hours) A</div> <div>+</div> </div> <div> <div>200130</div> <div>FIST100</div> <div>(3 Hours) C</div> <div>+</div> </div> <div> <div>FARTS500</div> <div>(3 Hours) A</div> <div>+</div> </div> <div> <div>20018</div> </div> <div>Course Forcing :</div> <div>Cancel</div> </div>	<div>Tab 1. Force Course</div> <p>Move courses from the course list into the <i>Course Forcing:</i> box on the right by clicking add (+):</p>
<div> <div>Force Course Exception</div> <div>Subrequirement</div> <div>English</div> <div> <div>1. Force Course</div> <div>2. Verify & Save</div> </div> <div> <div>200110</div> <div>ENGL400</div> <div>(3 Hours) A</div> </div> <div> <div>200130</div> <div>FIST100</div> <div>(3 Hours) C</div> </div> <div> <div>FARTS500</div> <div>(3 Hours) A</div> </div> <div> <div>20018</div> <div>UNKN902</div> <div>(3 Hours) TA</div> </div> <div> <div>ENGL111</div> <div>200110</div> <div>(3 Hours) A</div> <div>🗑️</div> </div> <div>Course Forcing :</div> <div>Next</div> <div>Cancel</div> </div>	<div>Tab 1. Force Course (continued)</div> <p>Course is moved to <i>Course Forcing:</i> box</p> <p>Any additions away from default renders an action button:</p> <ul style="list-style-type: none"> • Next • Cancel <p>Undo a course addition into the Course Forcing: box using the Delete button (🗑️).</p>

<div> <h3>Force Course Exception</h3> <p>Subrequirement English</p> <div> 1. Force Course 2. Verify & Save </div> <p><i>Course Forcing :</i> ENGL111 200110 (3 Hours)A</p> <p><i>Info:</i> English Using pseudo of ENGLISH REQ.</p> <p><input checked="" type="checkbox"/> Restrict to this Degree Program.</p> <p>Audit Note</p> <p>Short note about audit.</p> <p>(Maximum characters: 27)</p> <p>Memo</p> <p>Type in a memo here.</p> <p>(Maximum characters: 255)</p> <div> <div> Authorized by <input type="text" value="klement"/> (Maximum characters: 30) </div> <div> Date <input type="text" value="04/14/2014"/> </div> </div> <div> <input type="button" value="Back"/> <input type="button" value="Save & Run Audit"/> <input type="button" value="Save & Add Exception"/> <input type="button" value="Cancel"/> </div> </div>	<h3>Tab 2. Verify & Save</h3> <ul style="list-style-type: none"> Review Force Course made on Tab 1 May check option to Restrict to This Degree Program (checked by default) Complete fields for Audit Note, Memo, Authorized By, and Date (or use the default text) Action buttons: <ul style="list-style-type: none"> Back Save & Run Audit <p>Exceptions made will not be reflected on the audit until a new audit is run.</p> <ul style="list-style-type: none"> Save & Add Exception Cancel <p>Note that the Authorized by and Date fields are autopopulated.</p>
---	--

- Use force course as a last resort. While it is an incredibly powerful exception, it can also cause unintended issues if used incorrectly. Try using an Add Course exception prior to a Force Course.
- Be wary about using Force Course in the Core.

<div>✓</div> Force Sub-Requirement Complete	
<div data-bbox="219 262 836 1071"> <div>Subrequirement Force Complete Exception</div> <div>Subrequirement Subrequirement 1</div> <div>1. Verify & Save</div> <div>This Exception will force the current Subrequirement to Completion.</div> <div><input checked="" type="checkbox"/> Restrict to this Degree Program.</div> <div>Audit Note Short note about audit. <small>(Maximum characters: 27)</small></div> <div>Memo Type in a memo here. <small>(Maximum characters: 255)</small></div> <div>Authorized by klement <small>(Maximum characters: 30)</small></div> <div>Date 04/14/2014</div> <div>Save & Run Audit Save & Add Exception Cancel</div> </div>	<div data-bbox="885 262 1404 1281"> Tab 1. Force Sub-Requirement Complete <p>The Force Complete exception forces a current Sub-Requirement to completion, no matter what. Using this exception will remove all courses from the requirement and place them in other requirements. Be careful when using this exception.</p> <ul style="list-style-type: none"> • May check option to "Restrict to This Degree Program" (unchecked by default) • Complete fields for Audit Note, Memo, Authorized By, and Date (or use the default text) • Action buttons: <ul style="list-style-type: none"> • Save & Run Audit • Save & Add Exception • Cancel <p>Exceptions made will not be reflected on the audit until a new audit is run.</p> <p>Note that the Authorized by and Date fields are autopopulated.</p> </div>

- Forcing a sub-requirement complete will remove any courses currently residing in the sub-requirement. These will then place anywhere else in the audit where they can possibly match. Be sure to verify that the audit looks correct after doing this type of exception.

Edit Sub-Requirement

Subrequirement Modification Exception

Subrequirement

Subrequirement 1

1. Subrequirement Modification

2. Verify & Save

Required Hours

Original Value: 13.00000

Adjust by: - 0.00 +

Required Course Count

Original Value: 2

Adjust by: - -1 +

Required GPA

Original Value: 0

Adjust by: - 0.00 +

Next

Cancel

Tab 1. Sub-Requirement Modification

- Make edits to the Sub-Requirement by adjusting up (+) or down (-) incrementally from the default value of zero:
 - Required Course Count
 - Required Hours
 - Required GPA
- Any edits away from default values render an action button:
 - Next
 - Cancel

Subrequirement Modification Exception

Subrequirement

Subrequirement 1

1. Subrequirement Modification

2. Verify & Save

Required Hours

Original Value: 13.00000

Adjust by: 0.00

Required Course Count

Original Value: 2

Adjust by: -1

Required GPA

Original Value: 0

Adjust by: 0.00

☒ Restrict to this Degree Program

☒ Restrict to this Requirement

Audit Note

Short note about audit.

(Maximum characters: 27)

Memo

Type in a memo here.

(Maximum characters: 255)

Authorized by

klement

(Maximum characters: 30)

Date

04/14/2014

Back

Save & Run Audit

Save & Add Exception

Cancel

Tab 2. Verify & Save

- Review edits made on Tab 1
- May check option to Restrict to This Degree Program and/or Restrict to This Requirement.
- Complete fields for Audit Note, Memo.
- Action buttons:
 - Back
 - Save & Run Audit
 - Save & Add Exception
 - Cancel

Exceptions made will not be reflected on the audit until a new audit is run.

Note that the **Authorized by** and **Date** fields are autopopulated.

Course-Level Exceptions (“Select From” Exceptions)

+

Add Course

Add Course Exception

Subrequirement

Psychology

1. Add Course

2. Verify & Save

Find the course you want to use:

Dept

Course

+

OR Select a student course:

200110

ENGL400

(3 Hours) A

+

ENGL111

(3 Hours) A

+

200130

FIST100

(3 Hours) C

+

FARTS500

(3 Hours) A

+

20018

Next

Cancel

Course Adding :

ENGL201F

Add Date

(3 Hours) A

+

ARCH7102

Add Date

(3 Hours) A

+

Something

Tab 1. Add Course

- Move courses from the course list into the *Course Adding:* box on the right by clicking add (+):
- Course is moved to *Course Adding:* box
- Any additions away from default renders an action button:
 - Next
 - Cancel
- Undo a course addition into the *Course Adding:* box using the **Delete** button (🗑️).

Add Course Exception

Subrequirement

Psychology

1. Add Course

2. Verify & Save

Need to modify the subrequirement? Click here.

Course Adding :

ENGL201F

Not Taken

(3 Hours) A

+

ARCH7102

Not Taken

(3 Hours) A

+

Something

Info:

Psychology

Using pseudo of HOMEARTIC 2

Required Course Count

Original Value:

1

Adjust by:

-

0

+

Required Hours

Original Value:

0.00000

Adjust by:

-

0.00

+

Required GPA

Original Value:

0.00000

Adjust by:

-

0.00

+

Cancel subrequirement changes? Click here.

☒ Restrict to this Degree Program.

☒ Restrict to this Requirement

Audit Note

Short note about audit.

(Maximum characters: 27)

Memo

Type in a memo here.

(Maximum characters: 255)

Authorized by

klement

(Maximum characters: 30)

Date

04/15/2014

Back



Save & Run Audit

Save & Add Exception

Cancel

Tab 2. Verify & Save

- Review Add Course made on Tab 1
- Click the hyperlink to generate an area to modify the sub-requirement, or cancel changes and close the area
- May check option to Restrict to This Degree Program and/or Restrict to This Requirement
- Complete fields for Audit Note, Memo, Authorized By, and Date (or use the default text)
- Action buttons:
 - Back
 - Save & Run Audit
- Exceptions made will not be reflected on the audit until a new audit is run.
 - Save & Add Exception
 - Cancel

<div data-bbox="203 191 261 243"> </div> <div data-bbox="289 201 496 233"> <h2>Remove Course</h2> </div> <div data-bbox="250 275 509 300"> <h3>Remove Course Exception</h3> </div> <div data-bbox="250 312 380 333"> <p>Subrequirement</p> </div> <div data-bbox="250 340 376 361"> <p>Subrequirement 1</p> </div> <div data-bbox="272 396 406 417"> <p>1. Remove Course</p> </div> <div data-bbox="443 396 561 417"> <p>2. Verify & Save</p> </div> <div data-bbox="250 453 453 495"> <p>Select course(s) you want to remove:</p> </div> <div data-bbox="272 501 326 522"> <p>JIM100</p> </div> <div data-bbox="358 501 391 522"> </div> <div data-bbox="272 533 347 554"> <p>ENGL201F</p> </div> <div data-bbox="358 533 391 554"> </div> <div data-bbox="570 453 709 478"> <p>Course Removing :</p> </div> <div data-bbox="250 816 308 837"> <p>Cancel</p> </div>	<div data-bbox="894 249 1192 281"> <h3>Tab 1. Remove Course</h3> </div> <ul style="list-style-type: none"> Move courses from the course(s) to remove list into the <i>Course Removing:</i> box on the right by clicking remove ()
<div data-bbox="250 921 513 947"> <h3>Remove Course Exception</h3> </div> <div data-bbox="250 959 380 980"> <p>Subrequirement</p> </div> <div data-bbox="250 987 376 1008"> <p>Subrequirement 1</p> </div> <div data-bbox="272 1043 406 1064"> <p>1. Remove Course</p> </div> <div data-bbox="443 1043 561 1064"> <p>2. Verify & Save</p> </div> <div data-bbox="250 1100 453 1142"> <p>Select course(s) you want to remove:</p> </div> <div data-bbox="272 1148 326 1169"> <p>JIM100</p> </div> <div data-bbox="339 1148 363 1169"> </div> <div data-bbox="570 1100 709 1121"> <p>Course Removing :</p> </div> <div data-bbox="574 1131 656 1152"> <p>ENGL201F</p> </div> <div data-bbox="664 1131 688 1152"> </div> <div data-bbox="250 1463 292 1484"> <p>Next</p> </div> <div data-bbox="323 1463 381 1484"> <p>Cancel</p> </div>	<div data-bbox="894 896 1354 928"> <h3>Tab 1. Remove Course (continued)</h3> </div> <ul style="list-style-type: none"> Course is removed, into <i>Course Removing:</i> box. Any removals away from default renders an action button: <ul style="list-style-type: none"> Next Cancel Undo a course removal into the <i>Course Removing:</i> box using the Delete button ()

Remove Course Exception

Subrequirement

Subrequirement 1

1. Remove Course

2. Verify & Save

Need to modify the subrequirement? Click here.

Course Removing : ENGL201F

Info: Subrequirement 1

Using pseudo of MELACCT

☒ Restrict to this Degree Program
☒ Restrict to this Requirement

Audit Note

Short note about audit.

(Maximum characters: 27)

Memo

Type in a memo here.

(Maximum characters: 255)

Authorized by

klement

(Maximum characters: 30)

Date

04/15/2014

Back

Save & Run Audit

Save & Add Exception

Cancel

Required Hours

Original Value: 13.00000

Adjust by: - 0.00 +

Required GPA

Original Value: 0

Adjust by: - 0.00 +

Required Course Count














Original Value: 2

Adjust by: - 0 +

Cancel subrequirement changes? Click here.

Tab 2. Verify & Save

- Review Course Removing made on Tab 1
- Click the hyperlink to generate an area to modify the sub-requirement, or cancel changes and close the area
- May check option to Restrict to This Degree Program and/or Restrict to This Requirement
- Complete fields for Audit Note, Memo, Authorized By, and Date (or use the default text)
- Action buttons:
 - Back
 - Save & Run Audit
- Exceptions made will not be reflected on the audit until a new audit is run.
 - Save & Add Exception
 - Cancel

<div>  Swap Course </div>	
<div> <div> Swap Course Exception </div> <div> Subrequirement Subrequirement 1 </div> <div> <div> 1. Swap Out 2. Swap In 3. Verify & Save </div> </div> <div> Select course(s) you want to swap out: <div> ENGL201F  </div> </div> <div> Swapping Out : <div> JIM100  </div> </div> <div> <div>Next</div> <div>Cancel</div> </div> </div>	Tab 1. Swap Out <ul style="list-style-type: none"> Move courses from the course list into the <i>Swapping Out:</i> box on the right by clicking remove (): Course is moved to <i>Swapping Out:</i> box Any swapping away from default renders an action button: <ul style="list-style-type: none"> Next Cancel Undo a course swap into the <i>Swapping Out:</i> box using the Delete button ().
<div> <div> Swap Course Exception </div> <div> Subrequirement Subrequirement 1 </div> <div> <div> 1. Swap Out 2. Swap In 3. Verify & Save </div> </div> <div> Find the course you want to use: <div> <div> Dept Course </div> <div> <input type="text"/> <input type="text"/>  </div> </div> <div> Swapping In : <div> ENGL201F Add Date (3 Hours)A  </div> </div> <div> OR Select course(s) you want to swap In: <div> <div> BBB 111 (3 Hours) A </div> <div>  </div> </div> <div> <div> ARCH7102 (3 Hours) A Something </div> <div>  </div> </div> <div> <div> 201310 JIM100 (3 Hours) RG </div> <div>  </div> </div> <div> <div> FLOP100 (3 Hours) IP </div> <div>  </div> </div> </div> </div> <div> <div>Back</div> <div>Next</div> <div>Cancel</div> </div> </div>	Tab 2. Swap In <ul style="list-style-type: none"> Select a course from the list to swap into the <i>Swapping In:</i> box using the add button (). Undo a course swap into the <i>Swapping In:</i> box using the Delete button (). Any swapping away from default renders an action button: <ul style="list-style-type: none"> Back Next Cancel

Swap Course Exception

Subrequirement

Subrequirement 1

1 Swap Out 2 Swap In 3. Verify & Save

Need to modify the subrequirement? Click here.

Swapping In : ENGL201F
Not Taken
(3 Hours)

Swapping Out : JIM100

Info:
Subrequirement 1
Using pseudo of MELACCT

☒ Restrict to this Degree Program. ☒ Restrict to this Requirement.

Audit Note
Short note about audit.
(Maximum characters: 27)

Memo
Type in a memo here.
(Maximum characters: 255)

Authorized by
klement
(Maximum characters: 30)

Date
04/15/2014

Back Save & Run Audit Save & Add Exception Cancel

Required Course Count

Original Value: 2

Adjust by: - 0 +

Required Hours

Original Value: 13.00000

Adjust by: - 0.00 +

Required GPA

Original Value: 0

Adjust by: - 0.00 +

Cancel subrequirement changes? Click here.



Tab 3. Verify & Save

- Review Swap Out and Swap In made on Tabs 1 and 2, respectively
- Click the hyperlink to generate an area to modify the sub-requirement, or cancel changes and close the area
- May check option to Restrict to This Degree Program and/or Restrict to This Requirement Complete fields for Audit Note, Memo, Authorized By, and Date (or use the default text)
- Action buttons:
 - Back
 - Save & Run Audit
- Exceptions made will not be reflected on the audit until a new audit is run.
 - Save & Add Exception
 - Cancel

Note: If the Sub-Requirement has been completed, then the “Select From” line may not appear in exception mode. You will need to use the Advanced Exception (below) if you need to complete a Delete Course, Insert Course, or Swap Course exception.

Advanced Exceptions – Requirement & Sub-Requirement Level

Navigate to the requirement or sub-requirement of interest on the audit side (left side) of the exceptions page. The Advanced Exceptions button will appear as a lightning bolt button at the requirement level and sub-requirement level:

- Requirement's **Advanced Exceptions** button () in dark brown
- Sub-requirement's **Advanced Exceptions** button () in orange

Choose an Exception Type

Clicking the **Advanced Exceptions** button at either the requirement or sub-requirement level will generate the Choose an Exception Type page. Review the list of exception types, descriptions, and exception codes to find the type of exception you would like to create.

Choose an Exception Type

[Return to list of exceptions](#)

Description	▲ Exception Code
Requirement Modification - Delete Course	DC
X-Line Modification	EX
Requirement Modification - Insert Course	IC
Requirement Modification - Insert Course to Bypass Condition Code Testing	IW
Add Marker Requirement	MK
Requirement/Sub-Requirement Modification	RM
Add Condition Code to Course	RP
Substitute a Course for a Pseudo-Course	RT
Requirement/Sub-Requirement Waiver	RW
Course Substitution	SC
Requirement Modification - Course Substitution	SS
Requirement Modification - Course Substitution to Bypass Condition Code Testing	SW
Waive Course	WC
Force Complete	WH
Waive Pseudo Course	WP
Add or Remove System Condition Code	WT

Click either the Description or the Exception Code to create the new exception:

Description	▲ Exception Code
Requirement Modification - Delete Course	DC
X-Line Modification	EX
Requirement Modification - Insert Course	IC

The exception screen will reappear. The audit side (left side) will highlight the specific sub-requirements you are working with. The exceptions side (right side) displays a series of fields specific to the exception type selected.

- > This Degree Requires 120 total applicable credits and a minimum cumulative GPA of 2.0 on all courses
- > Arts and Languages.
- > General Education - Arts and Languages 2014Fa
- > General Education - English
- > Testing waivers and such OK to add to if needed
- > Major in Psychology
- > OR Major in Psychology - Or'd Option
- > Geneds
- > Gened Limited Elective
- > Has or'd sub-requirement choice for thesis
- > Requirement with 3 Science Lists
- > Excess Courses
- ▼

Courses Listed by Term 1 to 2020Sp

		ATTEMPTED		12 POINTS	4.000 GPA
		3 HOURS			
	1002 ENGL111	3.00	A	OSU: ENGLISH 110	
	Min 2.0				
PL	2016Fa	(9 Hours Taken)		3 COURSES TAKEN	2.000 GPA
	16Fa ARTS181	3.00	C	>W	No description
	16Fa ARTS100	3.00	C	>W	No description
	16Fa ENGL212F	3.00	C	>W	English Literature Since 1800
PL	2017Sp	(3 Hours Taken)		1 COURSE TAKEN	2.000 GPA
	17Sp ENGL224	3.00	C	>W	No description

DPMask

Dprog

BAPSYCH - DP

Requirement Name

TRANSC DP

Auth Code

Pseudo Course

TRANSCRIP

Memo

Authorized By

klement

Date

06/06/2016

Add Course

Remove
select all/select none

#	Course	Replacement Course	Match Control	Year Term Range	Edit	Remove
No courses found						

Save & Run Audit

Save & Add Exception

Cancel

More Button

Several of the fields may be pre-populated (autocompleted) from the audit, and are marked as such with a **More** button designated by an orange wand (). The **More** button facilitates creation of many additional complex exceptions.

DPMask

Dprog

BAPSYCH - DP

Requirement Name

TRANSC DP

Auth Code

Pseudo Course

TRANSCRIP

Memo

Authorized By

klement

Date

06/06/2016

Pseudo course populated from the audit

Per the example from the screenshot above:

- **DPMask:** is not pre-populated. **Do not enter anything here.**
- **Dprog:** is pre-populated from the audit.
- **Requirement Name:** is pre-populated from the audit
- **Auth Code:** is *always* pre-populated since the exception will not apply if the auth code was not set (even if the field is not showing to the user)
- **Pseudo Course**
 - Is pre-populated to the default pseudo, but user can change this to a different preferred pseudo
 - If you backspace out of the pre-populated Pseudo Course (in this example, TRANSCRIP), a list of *all available pseudos* that apply to the sub-requirement based on the encoding will appear in a drop-down menu for alternate selections:

Pseudo Groupings

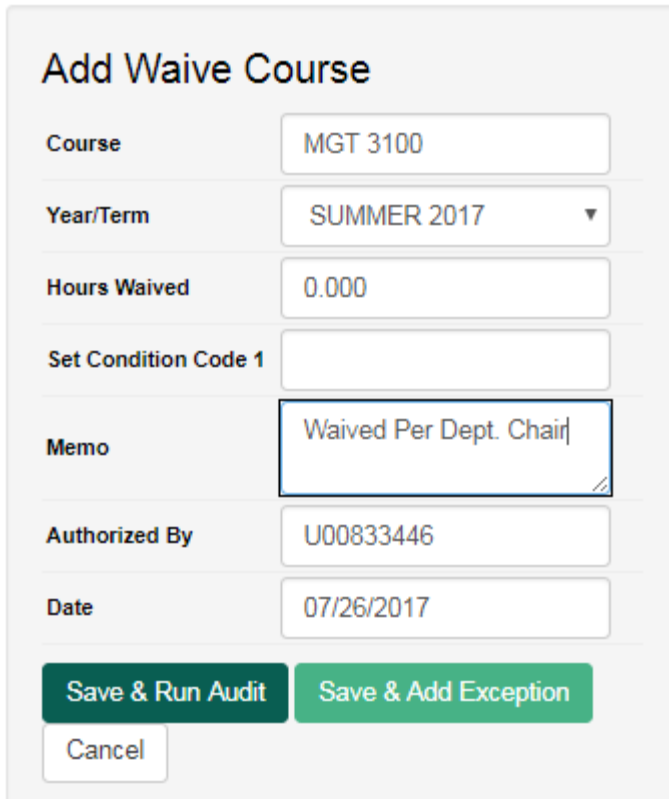
- The list of all available pseudos can be especially useful when working with complicated pseudo groupings, providing the user a time-saving advantage since groupings will not have to be manually entered. All available pseudos will appear in the Select From line are automatically set to begin, but users can key in others if encoding changes are anticipated.

Advanced Exception – Waiving a Course Method 1

Step 1. Select the Advanced Exception Button on the Sub-Requirement.

Step 2. Select Waive Course or WC.

Step 3. Fill out the form.



The screenshot shows a web form titled "Add Waive Course". It contains several input fields: "Course" with the value "MGT 3100", "Year/Term" with a dropdown menu showing "SUMMER 2017", "Hours Waived" with the value "0.000", "Set Condition Code 1" which is empty, "Memo" with the text "Waived Per Dept. Chair", "Authorized By" with the value "U00833446", and "Date" with the value "07/26/2017". At the bottom, there are three buttons: "Save & Run Audit" (dark green), "Save & Add Exception" (light green), and "Cancel" (white with a grey border).

NEVER ADD HOURS WAIVED. This will create fake hours for the student, which is against university policy.

If the course you are waiving requires a grade of “C” or better, put a lower-case “c” in the Set Condition Code 1 field.

The term can be set to the current term.

Step 4. Select Save and Run Audit.



Advanced Exception – Waiving a Course Method 2

Another method of waiving a course is by using a modified Delete Course. This looks better on the uAchieve audit than the WC option.

Step 1. Select the Advanced Exception Button on the Sub-Requirement.

Step 2. Select Requirement Modification – Delete Course or DC.

Step 3. The form is pre-filled. You will need to put -1 (or however many courses are being waived) in the Required Sub-reqs (req level) or Courses (sub-req) box:

Requirement Name	<input type="text" value="S-BA-BCUL"/>	
Pseudo-Course Name	<input type="text" value="BA-BCUL1"/>	
Exception Note	<input type="text"/>	
Required Sub-reqs (req level) or Courses (sub-req)	<input type="text" value="-1"/>	

Step 4. Scroll to the bottom of the exception and press Add Course:

Add Course

Remove
select
all/select
none

▲ #	Course	Replacement Course	Match Control	Year Term Range	Edit
<div>No courses found</div>					

Step 5. Type the name of the course you are waiving and select Add to List:

Add Course

Course

MGT 3100

Replacement Course

Match Control

Default

Year Term Range

Add To List

Return

Remove

Press return once the course has been added.

Step 6. Save and Run your audit.

Add Course

Remove

select
all/select
none

#	Course	Replacement Course	Match Control	Year Term Range	Edit
1	MGT 3100				

Save & Run Audit

Save & Add Exception

Cancel

This removes the course from the sub-requirement and also reduces the sub-requirement by 1 course, effectively waiving it for the student.

Adjusting Max Count

There are times when an IC/IW exception does not work. It may put the course in the *Select From* line or not insert the course at all. This may potentially be caused by the sub-requirement having a maximum number of courses it will accept.

If you need to increase the Max Count/USECT, go to the Exceptions tab.

Choose the IC/IW or RM exception you just completed.

[Audits](#) [Courses](#) [Comments](#) **Exceptions** [Transfer Evaluations](#) [Profile](#)

Exceptions

Exceptions to requirements and subrequirements. Adding or deleting exceptions deletes them from the student's academic record. Text on the exception type list screen

[Add Exception](#) [Delete](#)

select all/select none

#	Code	A	R	Course	Rcourse	Audit Note	Pseudo Name	authId	authDate	Edit	Delete
1	RT	C	P	MTH@1106	CORE-BUS2				08/08/2017		
2	RM	R	U			Requirement Modification	CORE-7		08/08/2017		
3	IW	R	U			Insert Course	CORE-7		08/08/2017		

You can increase the Max Count/USECT by the number of additional courses you want to insert. Save your changes. (See next page).

Edit Requirement Modification - Insert Course to Bypass Condition Code Testing

Dprog	<input type="text"/>
Requirement Name	<input type="text" value="CORE-BUS"/>
Pseudo-Course Name	<input type="text" value="CORE-7"/>
Exception Note	<input type="text" value="Insert Course"/>
Required Sub-reqs (req level) or Courses (sub-req)	<input type="text" value="0"/>
Required hours	<input type="text" value="0"/>
Required Count (req level)	<input type="text" value="0"/>
Required GPA	<input type="text" value="0"/>
Accept Code 1	<input type="text"/>
Accept Code 2	<input type="text"/>
Reject Code 1	<input type="text"/>
Reject Code 2	<input type="text"/>
Max Hours	<input type="text" value="0"/>
Max Hours Control	<input type="text"/>
Max Count/USECT	<input type="text" value="1"/>