UNIVERSITY OF MARYLAND

u.achieve

How-to Guide

OFFICE OF THE REGISTRAR

CONTENTS

OVERVIEW

u.achieve is an online degree auditing tool that is available to students and advisors. The system is designed to helps advisors evaluate a student's progress towards completion of requirements for a major/program by taking courses the student has taken and inserting them into the requirements for a degree. The system can be used to examine progress in a student's registered major or in any other major/program we offer on campus (e.g., you may conduct an audit in a major that a student is considering switching into).

SYSTEM AVAILABILITY
u.achieve is available on the same schedule as other student-based systems on campus:

> M-F   7:30am-11pm
> Saturday 7:30am-11pm
> Sunday   5:30pm-11pm

Students
Students can access their version of u.achieve by going to www.testudo.umd.edu and then selecting the 'Degree Audit' link. Students then use their University directory login to use the system.

Advisors
You must have an active u.achieve account to access the system as an advisor. To obtain an account, go to http://www.helpdesk.umd.edu/documents/3/3669/ and follow the instructions related to u.achieve access.

Once you have an account, your University Directory ID will get you into the system (this is the same login you use for other University systems such as ARES, your timesheet, and Corporate Time).

(Your Directory ID password can be adjusted via the University's Directory ID website at https://identity.umd.edu/password/changepassword; contact the OIT Helpdesk at 301-405-1500 if you experience problems with your Directory ID login.)

GETTING HELP
If you experience problems or have questions about the system, please contact us at **uachieve@umd.edu**.

Reporting Problems
If you are reporting a problem, please be as specific about the problem as possible. If the problem involves inaccuracies or errors in a particular audit, please provide us with as much of the following as possible, including:

- the student UID in which the error appears
- the specific audit in which the error appears (e.g., "Computer Science, major code 07010")
- the specific requirement that contains the error (e.g., "Requirement 1")
- specifics about the error (e.g., "the student took MATH141H and should be applied to Requirement 1")

USING THE SYSTEM

MINIMUM SYSTEM REQUIREMENTS - u.achieve SELF SERVICE 4.1

Operating System:
- Windows
- MAC

Browser:
- IE 8 or 9
- Firefox 3.5 and 8,9
- Safari 5.1.2
- Chrome

Java:
- SE (6 or 7)
- EE 6 or 7)

Other:
- Web connectivity
- Adobe Reader to view PDF audits

GETTING INTO THE SYSTEM

If you experience problems accessing the u.achieve, please ensure that you meet the vendor's minimum system requirements listed above.

1. Go to ARES: **http://www.ares.umd.edu**

2. Select '**Advisor Services**' from the listing at the left

3. Select '**u.achieve**'

4. Select '**Undergraduate Students**'

5. Enter your University **Directory ID and password**
   (Contact the OIT Helpdesk at x51500 if you experience problems with your Directory ID login and/or contact us at uachieve@umd.edu to ensure that you have u.achieve access.)

1. FIND A STUDENT USING UID OR NAME
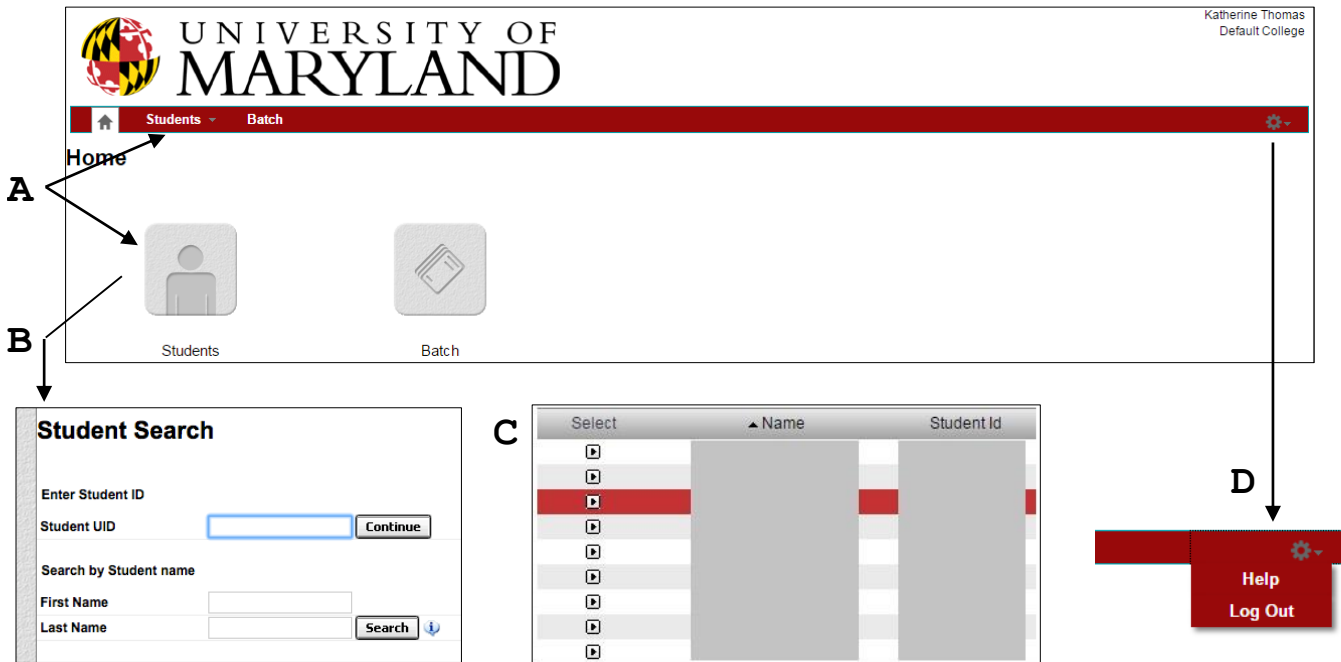
Step 1: Select 'Students' option: Click the 'Students' icon located on the home page or select 'Students' → 'Search' from the menu at the top of the page. (A)

Step 2: Find a student by UID: If you know the exact ID of the student you wish to locate, enter it in the Student ID field and click 'Continue'. (B)

Step 3: Find a student by Name: If you know a student's first or last name, enter one or both in the First Name and Last Name fields and click the Search button. You can search by a partial or full name. For example, searching for Jo will return students named both Jon and Jonathan. (B)

The search will return a list of possible matches, with the student's full name and UID. Select the appropriate student by clicking the [▶] button. (C)

NOTE: To Log Out or for Help, click the gear icon in the top right corner. (D)

2. REQUEST AN AUDIT
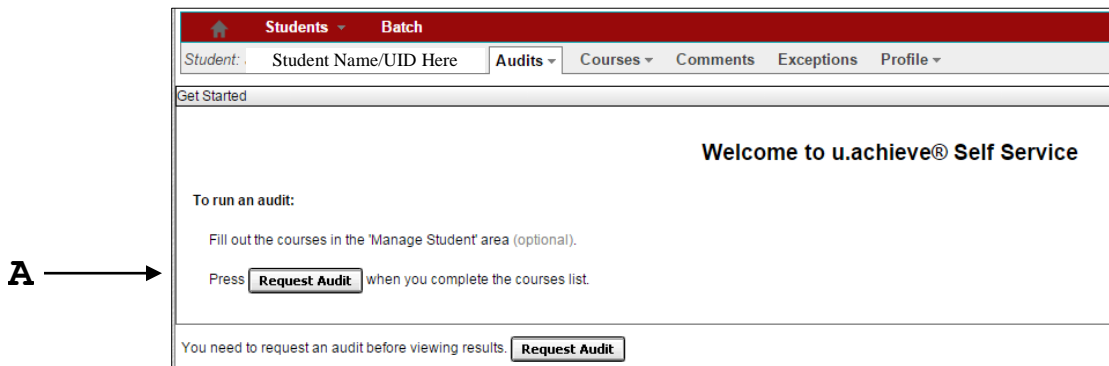
Request First Audit: When an audit is requested for a student for the first time, the screen will appear as it does in the example above. Click the 'Request Audit' button. (A)
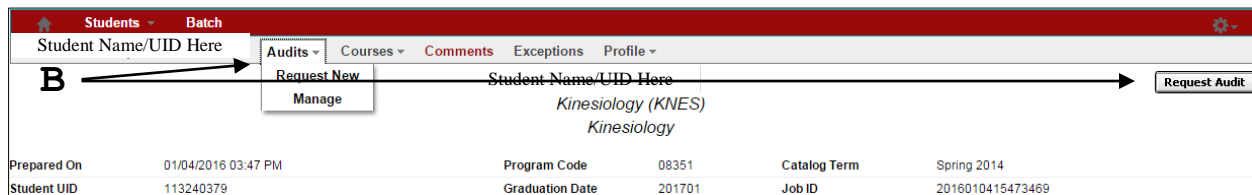
Request New Audit: If audits have been run in the past for the student, by default, u.achieve will display the last audit requested for the student. In order for the student's most current academic information to appear in the audit, you will need to select 'Audits' → 'Request New' or 'Request Audit' to run a new audit. Doing so will return the most up-to-date information for the student.

NOTE: As a best practice, running a new audit for a student every time you view their record in u.achieve is a good idea because it ensures the information is completely up-to-date. (B)
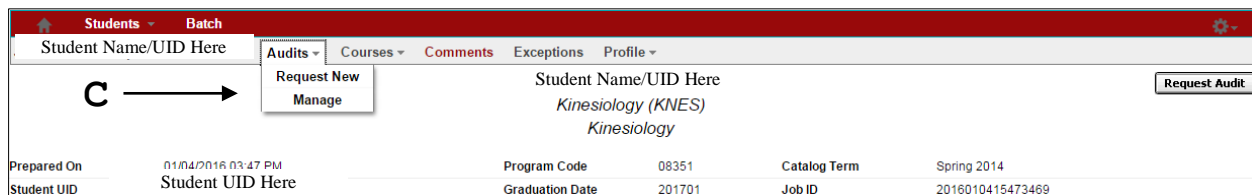
View Audit History: To view a list of all completed audit requests, select 'Audits' → 'Manage'. (C)

Completed Audit Requests: All completed audit requests will display here. Details include the audit 'ID' number, 'Program' code and major 'Title', 'Catalog Year', date and time the audit was 'Created', 'Format' (HTML or PDF), 'Run By' (advisor or student), and 'Audit Type'. (D)

3. REQUEST AN AUDIT IN THE STUDENT'S REGISTERED PROGRAMS

Step 1: <u>Select 'Run Current Programs'</u>: This will run an audit for the student's registered programs. (A)

The system will display the student's current programs and catalog year. (B)

Step 2: <u>Select Audit 'Options'</u>: There are several options that allow you to customize the audit. You can choose to include or exclude 'In Progress' courses or view the audit in PDF or HTML 'Format'. We recommend using HTML. (C)

NOTE: The 'What-if Courses' and 'Run Type' options have not been configured at this time. Please run using the default options.

Step 3: <u>Click 'Run Audit'</u>: You will return to the 'Completed Audit Request' screen while your request processes. (D)

Step 4: <u>View Completed Audit</u>: Once completed, the new audit will appear atop the list of completed audit requests. Note the 'Created' date to verify that you are viewing the most current audit. Click the 'Program Code' or 'View Audit' to open the audit results.

HINT: Click any column title to re-sort the audits in ascending or descending order. (E)

4. REQUEST A 'WHAT-IF' OR BENCHMARK AUDIT

Running a 'What-if' audit allows the advisor and student to see how current courses apply to another program. This is helpful if the student has not declared a major or would like to change or add a major, minor or certificate.

Step 1:   Select 'Run What-if Audit': This will run an audit for the student's registered programs. Choose the degree information including 'College', 'Program', and 'Catalog Year'.

To run a benchmark audit, select the appropriate college with the 'BK' suffix. For example, select 'BSOSBK' to run benchmark audits for BSOS majors. (A)

Step 2:   Select Audit 'Options': There are several options that allow you to customize the audit. You can choose to include or exclude 'In Progress' courses or view the audit in PDF or HTML 'Format'. We recommend using HTML. (B)

NOTE: The 'What-if Courses' and 'Run Type' options have not been configured at this time. Please run using the default options.

Step 3:   Click 'Run Audit': You will return to the 'Completed Audit Request' screen while your request processes. Once completed, the new audit will appear atop the list of completed audit requests. Note the 'Created' date to verify that you are viewing the most current audit. (C)

5. INTERPRETING THE AUDIT

DOWNLOAD FREQUENCY
Student data are downloaded from the Data Warehouse into u.achieve nightly. Therefore at times, a student's most recently added major or course may not appear in the audit. In such cases, you will need to wait until the nightly data refresh to view these additions in a student's record.

WHAT INFORMATION IS IMPORTED DIRECTLY FROM SIS?
The student's overall undergraduate GPA, which appears at the top of the audit reports, is taken directly from SIS and therefore, is not calculated within the u.achieve system; as such, this value is only as accurate as it is in SIS.

AUDIT STRUCTURE
The audit is structured as follows:
- Official Overall GPA
- University Degree Requirements
- Major Requirements
- General Education or Core Requirements
- General Elective Courses
- Unused Courses

VISUAL DISPLAY OF COURSES IN AN AUDIT
Courses are visually displayed so that you can identify, at a glance, certain attributes of courses that a student has taken.

AUDIT LAYOUT

I

	Students ▾	Batch						⚙▾

Student: Student Name/UID Here | Audits ▾ | Courses ▾ | Comments | Exceptions | Profile ▾

Student Name/UID Here
Kinesiology (KNES)
Kinesiology

Request Audit

Prepared On	12/30/2015 09:09 AM	**Program Code**	08351	**Catalog Term**	Spring 2014
Student UID	Student UID Here	**Graduation Date**	201701	**Job ID**	2015123009090698

Audit Results | Course History | Applied Exceptions | Markers

II

Audit
You are here: 🏠 Audit

Categories

Click on any area of the graph for further detail.

— 4.0
.....
— 2.0
.....
— 0.0

Hours   **GPA**

✅ Complete	➡ In Progress
❌ Unfulfilled	🔲 Planned

Major — 2.984
Gen Education — 3.375
Gen Elective
Unused Courses

0 20 40 60 80 100   0.0   2.0   4.0
Hours   **GPA**

III

⊞ Open All Sections ⊞ Close All Sections ⓘ   🖨Printer Friendly

AT LEAST ONE REQUIREMENT HAS NOT BEEN SATISFIED

▶ ✅ **Official Overall UG GPA of 2.0 MET**
▶ ❌ **UMD Degree Requirements**
         Additional information regarding Degree Requirements at
         UMD can be found in Chapter 4 of the:
         UG Catalog
▶ ❌ **Transfer and Prior Learning Credits**
▶   **[Major: KNES] Kinesiology Major Note:**
         Be sure to check if courses you wish to take have
         pre-requisites or co-requisites. You can click on the
         courses below to find this information.
▶ ✅ **[Major: KNES] Other Requirements**
▶ ➡ **[Major: KNES] Major Core**
▶ ❌ **[Major: KNES] Movement Activity**
▶ ❌ **[Major: KNES] Option Courses**
▶ ❌ **[Major: KNES] Foundations of Public Health**
▶ ❌ **[Major: KNES] Independent Studies Seminar**
▶ ✅ **General Education Required Credits**
▶ ➡ **[GenEd] Fundamental Studies**
▶ ➡ **[GenEd] Distributive Studies**
▶ ➡ **[GenEd] I-Series**
         Courses fulfilling the I-Series requirement may double
         count with Distibutive Studies and/or Diversity
▶ ✅ **[GenEd] Diversity**
         Courses fulfilling the Diversity requirement may double
         count with Distributive Studies and/or I-Series
▶   **General Elective Courses**
▶   **Unused Courses**

************************ END OF ANALYSIS ************************

IV

Legend
✅ Complete 🔲 Planned ➡ In Progress ❌ Unfulfilled ☐ None

I: Audit Header

In this section, the student's program information is displayed, including 'Prepared On' date and time, 'Program Code' (major, minor or certificate), 'Catalog Term' (term in which student matriculated in the program), 'Student UID', 'Graduation Date' and 'Job ID' (identification number for the audit).

II: Interactive Charts & Graphs
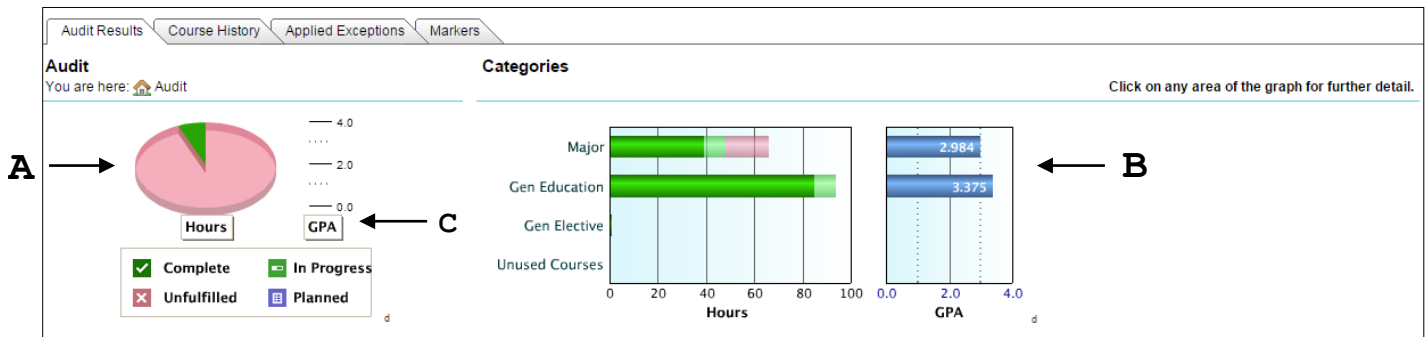
Pie Chart: The pie chart displays the student's overall progress toward their degree. The different sections are color coded to represent credits 'Completed', 'In Progress', 'Unfulfilled', and 'Planned' ('Planned' is not implemented at this time). (A)

NOTE: GPA is not visible here (cumulative GPA is displayed in the body of the audit). Only after drill down will the GPA be calculated in the graph. See section entitled 'Drill Down'. (C)

Bar Graphs: The left bar graph displays credits in one of four Categories, 'Major', 'General Education' (or Core), 'General Elective', or 'Unused Courses'. Bars are color coded to represent credits 'Completed', 'In Progress', and 'Unfulfilled'. The right bar chart displays the GPA for each 'Category'. (B)
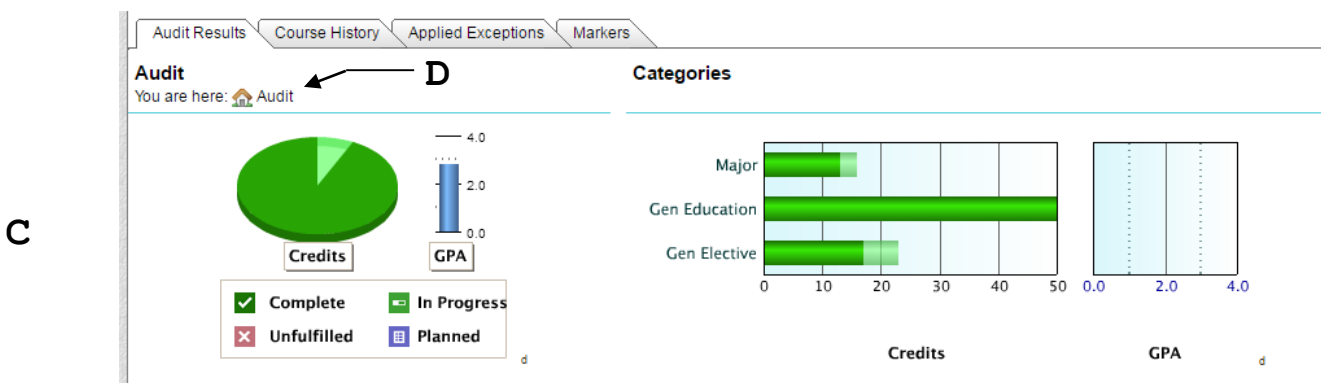
Drill Down: Click any bar on the graph to drill down for additional details. For example, by clicking the 'Major' bar, the audit will filter to display major requirements only and charts and graphs will provide more detailed information about progress toward each requirement in the major. It is possible to drill down even further by clicking on the specific requirement, e.g. the bar entitled, 'KNES Other Reqs'. (C)

To return to the full audit, click 'Audit'. (D)
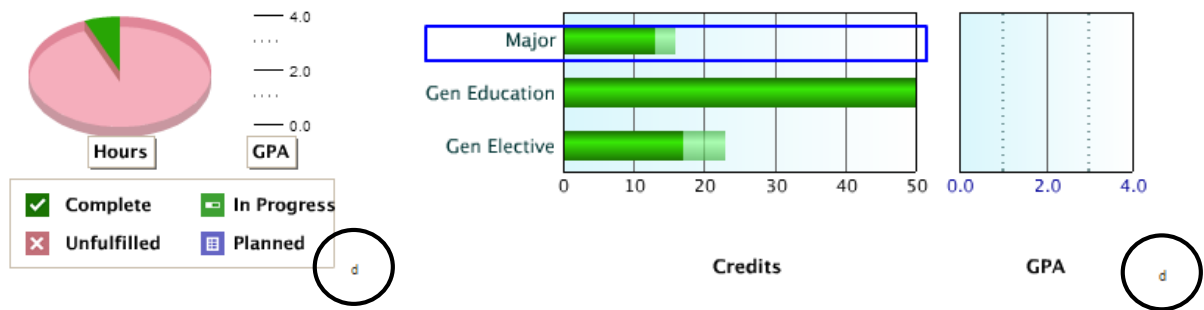
HINT: Click on the small 'd' icon for additional details about the charts and graphs.

III: Audit Requirements

View the Requirements: You can toggle all requirements open or closed by clicking the 'Open All Sections' or 'Close All Sections' links at the top of the audit. You can also open one requirement at a time by clicking the ▶ button next to each section. (A)

Interpret Audit Results: Hover over or click to open the Information icon ⓘ for details on 'How to Interpret Audit Results'. (B)

Course Codes

DUP - Duplicate Course
IP - In Progress Course
RAC - UMD Course: Academic Clemency
RNA - UMD Course: Not Applicable
ROK - Repeatable Course
RPT - Repeated Course
TDU - Transfer Course: Duplicate
TNA - Transfer Course: Not Applicable
tna - Transfer Course: Not Acceptable

Special Grades

NG - No Grade
M_ - Mid-Term Grade
T_ - Transfer Grade

REQUIREMENT – BASICS

In this example, the '[GenEd] Fundamental Studies' requirement is expanded to show all the courses taken or needed to satisfy this requirement. The requirement display will vary depending on the program.

1. The Requirement

REQUIREMENT TITLE: The first line of the requirement is the title. (A)
- e.g. This requirement is entitled '[GenEd] Fundamental Studies'.
- Note the ☒ symbol which indicates that the requirement is incomplete.

EARNED: The number of 'Credits' or 'Courses' that the student has completed toward the requirement. (B)
- e.g. This student has earned 6.0 credits toward this requirement.

IN PROGRESS: Number of credits in which the student is registered for the current term. (C)
- e.g. This student is currently registered for 6.0 credits for the current term (Spring 2016)

2. The Sub-requirement

SUB-REQUIREMENT TITLE: Each requirement is comprised of one or more sub-requirements. The sub-requirements must be completed to satisfy the requirement. (D)
- e.g. In this example, five (5) sub-requirements must be completed to satisfy the GenEd Fundamental Studies requirement. This student has completed two of the five sub-requirements as indicated by the ☑ symbol.

NEEDS: The number of courses and/or credits the student needs to satisfy the entire requirement. (E)
- e.g. The student needs 1 courses to complete the 'Fundamental Studies Professional Writing (FSPW)' requirement.

COURSE INFORMATION: A 'Completed' ☑ or 'In Progress' ▣ sub-requirement will display the course(s) applied to that sub-requirement. (F)
- In-Progress: Displays the term in-progress, credits attempted, the code 'IP' (in-progress), and the course title.
- Completed: Displays the term completed, credits earned, the final grade, and course title.

TRANSFER COURSES

All transfer course information is generated from the transfer course database in SIS. Thus, if a course is set to be equivalent to a UMD course in SIS, then u.achieve will process the course as the UMD equivalent when generating an audit.

- The UMD equivalent will appear on the left side of the audit (A) and the transfer course and associated institution will appear on the right side of the audit in the 'Title' column. (B)
- Transfer courses are marked with an 'X' prefix.
- Transfer course grades begin with a 'T'. In this example, the student earned an A in the course, so the grade appears in the audit as 'TA'. (C)

- If the transfer course does not have a UMD equivalent, then it will appear on both the left and right side of the sub-requirement with an 'X' prefix. (D)

IV: Legend

Legend: The 'Legend' appears at the bottom of the audit and within the Information icon. These symbols appear next to each requirement in the audit and are a quick and helpful tool for determining the status of each requirement.

6. VIEW LISTING OF ALL COURSES TAKEN (Option 1)

You may view a simple listing of all courses the student has taken, in non-audit form. This might be helpful if you would like to examine details about courses across different semesters, or, to examine student strengths/weaknesses by viewing courses taken grouped by course prefix.
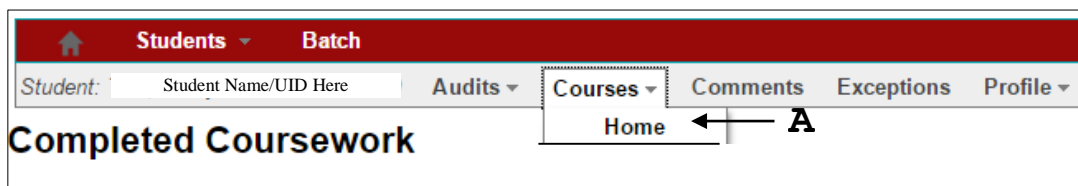
Step 1: <u>Select 'Courses'→ 'Home'</u>: Select 'Courses' and 'Home' from the main audit screen.

> NOTE: Transfer courses are listed under 'Home'. Transfer courses with no equivalents begin with an 'X' and transfer course grades begin with the letter 'T'.

Step 2: <u>View 'Completed Coursework'</u>: All completed coursework is listed here and included the 'Term' in which the course was taken, the 'Course' prefix and number, the course 'Title', the 'Grade', 'Registered Credit', and 'Last Modified Date'.

> NOTE: Please disregard 'Earned Credit'. This value is not available at this time.

> HINT: You can re-sort the list by clicking on any column header. (B)

Step 3: <u>Filters</u>: Coursework can be filtered by 'Term' or 'Grade' using the dropdown menus at the top of the screen. (C)

6. VIEW LISTING OF ALL COURSES TAKEN (Option 2)

You may view a simple listing of all courses the student has taken, in non-audit form.

Step 1: <u>Select 'Courses History'</u>: Select the 'Course History' tab from the main audit screen. (A)

Step 2: <u>View 'Coursework'</u>: All coursework is listed here and includes 'Term', 'Course Term' in which the course was taken, 'Course' prefix and number, 'Hours' (or credits earned), 'Grade' (transfers course grades begin with a 'T'), course 'Title', and 'Status' (i.e. in progress, or completed).

HINT: You can re-sort the by clicking on any column header. (B)

Step 3: <u>Filters</u>: Click on the green columns in the bar graph to filter the course list by term or use the 'Filter by' drop down menu to filter by 'Grade' or 'Term'. If you wish to return to the entire course list, just reset the 'Filter by' settings to their 'generic' settings (usually the title of the filter such as "Year" and "Term"). (C)

7. ADD OR VIEW COMMENTS

These are comments related to general advising issues. For example, you may want to note that a student has agreed to look into summer internships, or, that the student was apprised of his/her academic dismissal status.

Step 1:   Select 'Comments': From the main audit screen, select 'Comments'. (A)

Step 2:   Add Comment: Click the 'Add New Comment' button to add a new comment. (B)

Step 3:   Enter and Save Comment: Selecting 'Private' means only the commenter can see the comment. Otherwise, select 'Share with:' 'Student' or 'Other Advisors'. Enter the comment and click 'Save'. (C)

The saved comment will display 'From' (i.e. the commenter), 'To' (student, advisors, both, or private), and the date and time of the comment. (C)

NOTE: The audit and all comments made in u.achieve are considered part of the student's educational record. Under FERPA, students are permitted to inspect their educational record. For that reason, comments marked 'Private' or 'Other Advisors' can be shared with students at their request. Please take this into consideration when making 'Private' comments or comments to 'Other Advisors'.

Step 4:   Reply To or Modify a Comment: You may 'Reply to' or 'Edit' your own comments. You may only 'reply to' comments made by other users. (D)