CPoS: Best Practices for Using Degree Works and Banner

Emily Panzica
Senior Product Manager, Ellucian

SESSION ID: DWF254267

DEGREE WORKS™
FORUM 2019
ⓓ ellucian LIVE

Disclaimer

This presentation is not a commitment, promise or other obligation to deliver any material code or functionality, and it should not be relied upon in making any purchase decision. Development and release of Ellucian products and services may change, without prior notice, at Ellucian's discretion.

Introduction

- **Review Banner Student and Banner Financial Aid set up**

- **Learn how to use CPoS functionality with Ellucian Degree Works**

- **Review common issues using Ellucian Degree Works and CPoS**

Agenda

1   Course in Program of Study (CPoS) Overview

2   Banner Student Process

3   Degree Works Integration

4   Financial Aid Process

5   Current Known Issues

Courses in Program of Study

Overview

CPoS Requirements

Federal regulations stipulate that a student may only receive US Federal Title IV Funds for courses that count towards their degree/certificate

- Institutions outside of the US who disburse US Federal Title IV Direct loans must also comply with these regulations
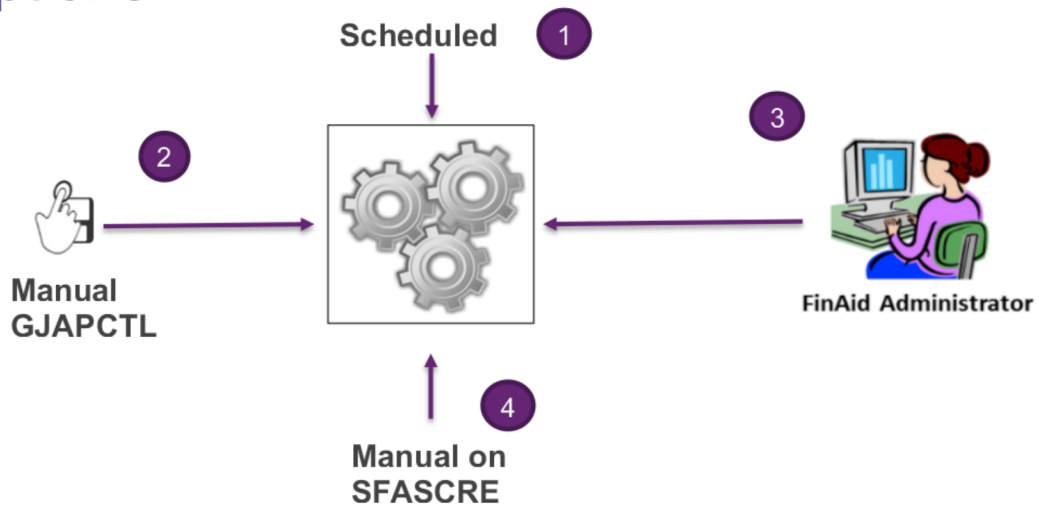
To comply with this regulation, institutions must track the courses that a student is registered for that count towards their degree/certificate program

- Remedial courses, ESL courses, and Repeated courses

CPoS Features

- **Processes students who have had a change that would impact degree audit**

OR Processes student using the new On Demand Evaluation CPoS process

- **Uses CAPP or Ellucian Degree Works or third party**

- **Allows default evaluation when no audit system is available**

- **Identifies ESL courses, course repeats, remedial courses, and courses in aid eligible programs**

- **Stores evaluation results with identifiers of the audit system used and reference to audit results**

- **User controls to define processing terms and to switch on/off processing elements**

- **Provides customizable rules for ESL, Remedial and Count for Aid**

Run Options

Scheduled ①

② Manual
GJAPCTL

③ FinAid Administrator

④ Manual on
SFASCRE

Courses in Program of Study

Student Process

CPoS Business Rules

GORRSQL Delivered Rules:

- ESL Course Business Rule

- Remedial Course Business Rules

- Count for Aid Business Rule

Rule Customization

- Institutions can incorporate their own logic to identify ESL, Remedial or Count for Aid courses

- Delivered parameters can be used on the GORRSQL rule page for CPoS Processing

  - AID_ELIG_AUDIT
  - CPOS_AUDIT_SYS
  - CPOS_CRN
  - CPOS_PIDM
  - CRSE_NUMB
  - SUBJ_CODE
  - TERM_CODE

Course Program of Study - SFACPSC Tabs

- **Process Rules Tab**
  - Setup Rules for the CPoS Process to work with audit system
  - Set up Registration terms
- **Override Rules Tab**
  - Setup Rules for CPoS to Process In Program Overrides
- **Repeat Exclusion Tab**
  - Setup Rules for the CPoS Process to Exclude Courses from Repeat Counts
- **Program Exclusion Tab**
  - Setup Rules for the CPoS Process to Exclude Students Based on Program, Level, Campus, College and/or Degree

Course Program of Study Control SFACPSC - Process Rules Tab

X	ellucian	Course Program of Study Control SFACPSC 9.3.11 (BUILD)	ADD RETRIEVE RELATED

Process Rules | Override Rules | Repeat Exclusion | Program Exclusion

PROCESS RULES   Insert   Delete   Copy

Field	Value	Field	Value
Perform ESL Processing	● Yes ○ No	ESL Rule Code	CPOS_ESL_RULE ... Standard rule for ESL process
Perform Remedial Processing	● Yes ○ No	Remedial Rule Code	CPOS_REMEDIAL_RULE ... Standard rule for Remedial process
Perform Repeat Processing	● Yes ○ No	Count for Aid Rule Code	CPOS_AID_RULE ... Standard rule for AID process
Perform Count For Aid Processing	● Yes ○ No	CAPP Default Code	CPOS ... Program of Study
Perform In Program Processing	● Yes ○ No	CAPP Origin Code	AUTO ... Generated Automatically
In Program Default Value	○ Yes ○ No ● None	API Integration Code	...
Audit System	● CAPP ○ Degree Works	Save Audit	☐
Include Program Repeats	● Yes ○ No	Audit Description	
Use Term as Catalog Year	○ Use Term Code ● Use Academic Year	Freeze Audit	☐
Process Code	CPOS ... CPOS Process Rules	Freeze Type	

REGISTRATION TERMS   Insert   Delete   Copy

Term *	Term Description	Start Date	End Date	Comments
302030	Summer ER 2020 (Do Not Change)	06/01/2017	08/20/2018	
302020	Spring ER 2020 (Do Not Change)	05/01/2017		

Course Program of Study Control SFACPSC - Override Rules Tab

×	⊘ ellucian	Course Program of Study Control SFACPSC 9.3.11 (BUILD)		ADD	RETRIEVE	RELATED	⚙

Process Rules	**Override Rules**	Repeat Exclusion	Program Exclusion			

▼ **IN PROGRAM OVERRIDE**   ➕ Insert   ➖ Delete   📄 Copy

Subject *	Course *	From Term *	Course Title	To Term	In Program
ENG	100	201010	English test	201410	Yes
HIST	107	201710	History of System Testing	201810	Yes

|◀ ◀ ① of 1 ▶ ▶| 10 ▼ Per Page   Reco

Course Program of Study Control SFACPSC - Repeat Exclusion Tab

Subject *	Course *	From Term *	Course Title	To Term
ENGL	100	201010	Basic Composition Skills	201020
MATH	100	201020	Math Again	201030

Course Program of Study Control SFACPSC - Program Exclusion Tab

Course Program of Study Control SFACPSC 9.3.10 (BUILD)	✕ ADD	RETRIEVE	RELATED	TOOLS

| Process Rules | Override Rules | Repeat Exclusion | **Program Exclusion** |

▼ PROGRAM EXCLUSION RULES ⊕ Insert ⊖ Delete ⧉ Copy ▼ Filter

Program	Level	Campus	College	Degree	Catalog From Term	Catalog To Term
ABC ...	UG	M			201410	201710
	CE				000000	999999
BA-ART	UG				201610	201620

|◄ ◄ 1 of 1 ► ►| 10 ▼ Per Page Record 1 of 3

Catalog From Term & To Term are required for each rule.

Course Program of Study Process (SFPCPOS)

	Process Submission Controls GJAPCTL 9.3.7 (BUILD)		ADD	RETRIEVE	RELATED	TOOLS

Process: SFPCPOS Course Program of Study Parameter Set: **Start Over**

▼ PRINTER CONTROL

Insert Delete Copy Filter

Printer		...	Submit Time		PDF Font Size	
Special Print			MIME Type	*None*	Delete After Days	
Lines	55		PDF Font	...	Delete After Date	

▼ PARAMETER VALUES

Insert Delete Copy Filter

Number *	Parameters	Values
01	Run Mode	S
02	Selection Application Code	
03	Selection Identifier	
04	Selection Creator ID	
05	Selection User ID	
06	Student ID	A00069763
07	Run in Sleep/Wake Mode	N
08	Sleep Interval	60
09	On Demand Evaluation	Y

|◄ ◄ 1 of 1 ► ►| 10 ▼ Per Page   Record 1 of 9

LENGTH: 1 TYPE: Character O/R: Required M/S: Single

Enter B-Batch, P-Population Selection, or S-Single Student ID.

▼ SUBMISSION

Insert Delete Copy Filter

☐ Save Parameter Set as		Hold / Submit ○ Hold ◉ Submit	
Name		Description	

Student Course Evaluation Audit (SFASCRE)

| X | Student Course Evaluation Audit SFASCRE 9.3.10 (BUILD) | | | | | | | | | | | ADD | RETRIEVE | RELATED | TOOLS |

Term: 201410   ID: A00069763   ProgExclTest26, F26   View Current: ☐

Start Over

▼ STUDENT COURSE EVALUATION AUDIT

Insert   Delete   Copy   Filter

Sequence *	CRN *	Subject	Course	Remedial *	Remedial Hours	ESL *	Repeat *	Repeat Count	Repeat Without Withdrawal	Count for Aid *	Count In Program	In Program Repeat	Preserve Override	Registration Status
1715	41002	HIST	101	No		No	No	0	0	No	No	Disabled	☐	RE
1714	41002	HIST	101	No		No	No	0	0	Yes	Yes	Disabled	☐	RE
1713	41002	HIST	101	No		No	No	0	0	No	No	Disabled	☐	RE
1712	41002	HIST	101	No		No	No	0	0	No	No	Disabled	☐	RE
1711	41002	HIST	101	No		No	No	0	0	Yes	Yes	Disabled	☐	RE
1710	41002	HIST	101	No		No	No	0	0	Yes	Yes	Disabled	☐	RE
1709	41002	HIST	101	No		No	No	0	0	Yes	Yes	Disabled	☐	RE
1696	41002	HIST	101	No		No	No	0	0	Yes	Yes	Disabled	☐	RE
1695	41002	HIST	101	No		No	No	0	0	Yes	Yes	Disabled	☐	RE

|◀ ◀ ①of 1 ▶ ▶| 10 ▼ Per Page

Record 1 of 9

Comments: <24-Feb-2018: All program(s) for this Student in this Term are excluded via Program Exclusion Rules. *Please refer to the log file for error and warning messages >

Audit Basis:

Source: Single Student ID

Create Date: 02/24/2018

Audit Source: Degree Works

[Evaluate Courses in Program of Study]

Audit ID:

Courses in Program of Study

Degree Works Integration

Ellucian Degree Works – UCX Settings

AUD032: Audit Freeze Types

- **Add a unique code as an eligible Freeze Type for CPoS if desired**

CFG020: Ellucian Degree Works Configuration

- **BANNER**
  - Program as Degree (Y/N)
- **DAP14**
  - Check Elective Credits Allowed (set to Y)
- **Other DAP14 settings such as the following may affect how courses are placed within the audit. Consult the Surecode UCX Technical Guide for an explanation of those settings.**
  - Audit History count (set to 03)
  - Apply In-Progress (set to Y)
  - In-progress vs. Completed (set to N)
  - Fallthrough counts in Overall (set to N)
  - What-if History Count (set to 00) non-frozen

Ellucian Degree Works – WhatIf API Request

Configuration Values

- **RefreshStudentData = null**
- **IncludeInProgressClasses = true**
- **IncludePreregisteredClasses = true**
- **IncludeInternalNotes = false**
- **KeepCurriculum = false**
- **SaveAudit = (based on setting on SFACPSC)**
- **Description = (based on setting on SFACPSC)**
- **Freeze = (based on setting on SFACPSC)**
- **FreezeType = based on setting on SFACPSC**

Ellucian Degree Works – WhatIf API Request

Student Specific Values:

Person

- PersonIDCode: (SPRIDEN_ID)

Academic Program

- School: school
- Degree: (SOVLCUR_DEGC_CODE+SOVLCUR_LEVL_CODE) if non-PAD
- Program: (SOVLCUR_PROGRAM+SOVLCUR_DEGC_CODE+SOVLCUR_LEVL_CODE) if PAD
- Catalog Year: catalogYear (SOVLCUR_TERM_CODE_CTLG) or (STVTERM_ACYR_CODE)

Goals

- goalMajors = all major codes tied to the curriculum program being sent
- goalMinors = all minor codes tied to the curriculum program being sent
- goalConcentration = all concentration codes tied to the curriculum program being sent
- Option, Certificate & Certification are also sent. Option maps to the LIBL block type and Certificate/Certification map to SPEC block type.

CPoS/Degree Works Support Articles

Degree Works Integrations Master Article #000039390

- Variety of articles covering setup, functionality and troubleshooting considerations for Course Program of Study and Degree Works

Banner Course Program of Study Master Article #000040418

- Additional articles specific to CPoS

Degree Works/CPoS Common Questions

Fall Thru Counts in Overall – CFG020 DAP14 (Article #000038275)

- Error will present: "Fallthrough code not found"

- Set "Check Elective Credits Allowed" to Y, which tells DW to run the process that calculates elective credits and assigns the codes to those courses in DW

Audits Frozen via CPoS/What-IF API on DW Side (Article #000036947)

- Setting to freeze audits located on SFACPSC
- View via the What-If History link in DW
- Stored in the DW database

Degree Works/CPoS Common Questions

Freeze Audit Error (Article #000040526)

- Check Freeze Type setting, should reference UCX-AUD032 table

- UCX-AUD032, add a freeze type for the missing freeze type reported in the error

Setting Up CPoS To Work with DW (Article #000035926)

- Step by step instructions located in article.

Degree Works/CPoS Common Questions

WHAT-IF User (Article #000036844)

- WHATIFAPI is the delivered DW User
- DW version 4.1.5 requires the WHATIFAPI user to have the RSAUDIT key in addition to the RSWHATIF key.
- DW 4.1.6 and later the WHATIFAPI user only needs the RSWHATIF key

Debug Mode for SFPCPOS (Article #000037141)

- Step by step instructions located in article.

Rerun SFPCPOS for a Student (Article #000039791)

- Step by step instructions located in article

Degree Works/CPoS Common Questions

Degree Works 5.0.1 and CPOS 403 and 415 Errors (Article #000043138)

Upgrading to Degree Works 5.0.1 can cause errors to start showing in CPOS logs. 403 (Access Forbidden) and 415 (Unsupported Media Type) are common.

- For the 403 Access Forbidden error: Make sure you have at least the Degree Works 5.0.1 Service Pack 1 installed. We suggest you install Service Pack 3.

- Add the NOREFER key to your WHATIFAPI user in Shepentry. If NOREFER does not appear on the list of keys, then add the following to SHP078 in the Surecode UCX tables:

  - Key = NOREFER

  - Description = Allows application access to Degree Works APIs

Degree Works/CPoS Common Questions

- Add the URL of your Banner job submission server, the one where you have SFPCPOS deployed) to the core.security.refererAllowableUrls. You only need the URL not the https:// part.

- Change the trailing part of the URL on SOAREST. Instead of **/service/audits/what-if** change that to **/api/audit/what-if**

For the 415 (Unsupported Media Type) error, Defect CR-000161206 was resolved in 5.0.1 Service Pack 3.

Courses in Program of Study

Financial Aid Process

Financial Aid Overview

Banner Financial Aid Release 8.24.2

- Provides the option to use the results of the Student Course Program of Study to determine

  o Course in Student's Program

  o Course defined as Remedial and number of Remedial hours taken

  o Course defined as ESL

  o Repeat Course evaluation

Banner Financial Aid Release 8.29.1/9.3.3

- In Program Repeat processing: the course is counted as "In Program" if either In Program or In Program Repeat are Yes

Financial Aid Setup

Enrollment Rules - RORENRR

- Rule settings to apply to CPoS Processing

Global Institution Financial Aid Options - ROAINST

- Set CPoS Processing Options

Financial Aid Repeat Course Exclusion – RORRPCX

- Exclude courses from Financial Aid repeat rules

Miscellaneous Parameters – RORMPRM

- Controls when enrollment calculation is used

Financial Aid Setup

Financial Aid Enrollment – ROAENRL

- Displays results of CPoS Audit

Applicant Immediate Process – ROAIMMP

- Ability to run Course Program of Study (SFPCPOS)

CPoS Dependencies

To use the integration with Degree Works if upgraded to Banner Student 9x Administrative Application:

Degree Works 4.1.5

Student can be installed without Financial Aid

- Use CPOS functionality to capture data for other business processes

Courses in Program of Study

Known Issues

CPoS Known Issues

CR-000164698: Whatif API request fails for Program as Degree systems when Program Code is passed as Goal-Value

In Program as Degree systems, the Program Code is stored on STU307 (Degree Codes). The API should validate the Program Code against STU307 instead of STU316 (Program Codes).

Workaround: Add any program to STU316 that a student is in who will be processed by CPOS.

ellucian LIVE | DEGREE WORKS™ FORUM 2019

CPoS Known Issues

CR-000162334: The SFASCRE Evaluate Courses in Program of Study option does not function exactly like running SFPCPOS with On Demand Evaluation = Y.

The differences are that the SFASCRE Evaluate Courses in Program of Study option updates the SFRSCRE_USER_ID, SFRSCRE_ACTIVITY_DATE, and SFRSCRE_COMMENT fields and creates a SFRHCRE for the record the cursor is on when clicking the SFASCRE Evaluate Courses in Program of Study option.

CPoS Known Issues

CR-000150946: SGRSATT Updates Not Triggering SFPCPOS Processing

CR-000161174: When a user adds a comment to a record on SFASCRE without checking the Preserve Override, the record that is created in SFRHCRE does not include the comment

CPoS Known Issues

CR-000153450: SFPCPOS - repeated courses are not working when grade falls below minimum grade

CR-000161197: When multiple terms are open for processing on SFACPSC and when a student has changes in only one of the open terms, SFPCPOS will only process the term where there have been changes to the student data when SFPCPOS Parameter 09 On Demand Process = N

Courses in Program of Study

CPoS Future Plans

CPoS Future Plans

- **Miscellaneous Defect Resolutions**

- **Performance for Ellucian Degree Works audit requests**

- **Potential IDEAS:**

  - IDEA-53192-Have CPOS obey the Fallthru Counts in Overall flag on UCX CFG020 DAP1

  - IDEA-54230-CPOS Bind Variables for ESL & Remedial Courses

Questions

Thank you.

Remember to fill out a conference evaluation!
www.ellucian.com/EllucianLive/DWF

Emily Panzica
emily.panzica@ellucian.com

DEGREE WORKS™
FORUM 2019
@ ellucian LIVE