

Adding Efficiency to Degree Clearance Processes

Today's Agenda

- Current functionalities:
 - Saved Reports/Helpful filters
 - Review feature
 - Remaining Requirements report
 - Batch audit printing
- Sneak peek of new multi-step approval process workflow

Saved Reports

Use cases:

- Save searches that you run on a regular basis
- Track changes to criteria that are important (GPA, unmatched courses, declared students, etc)
- Receive alerts on reports that are significant to you

The screenshot shows a web interface for managing student data. At the top, there are tabs for 'Students' (which is selected and underlined in blue), 'Programs', 'Courses', 'Pathways', and 'Staff'. Below the tabs, there is a search bar labeled 'Keywords' with the placeholder text 'Q Search advisees'. To the right of the search bar is a 'Filters' section with a dropdown arrow and several filter buttons: 'Demographics', 'Programs', 'Performance', 'Advisors', 'Remaining', 'Planned', 'Taken', 'Unmatched', 'Status', and a 'more' button. Below the filters, a message states 'No Selected Filter'. Underneath this, there is a section titled '3 SAVED REPORTS' with a downward arrow. This section contains three report cards. The first card is titled 'All students' and shows '449 students'. The second card is titled 'Seniors with expected grad S21' and shows '158 students'; it also includes a bell icon and the word 'Tracked'. The third card is titled 'Seniors with more than 10 reqs...' and shows '3 students'; it also includes a bell icon and the word 'Tracked'. Each card has a three-dot menu icon in the top right corner.

Students Programs Courses Pathways Staff

Keywords

Q Search advisees

Filters

Demographics Programs Performance Advisors Remaining Planned

Taken Unmatched Status more

No Selected Filter

3 SAVED REPORTS ▾

All students 449 students	Seniors with expected grad S21 158 students 🔔 Tracked	Seniors with more than 10 reqs... 3 students 🔔 Tracked
------------------------------	---	--

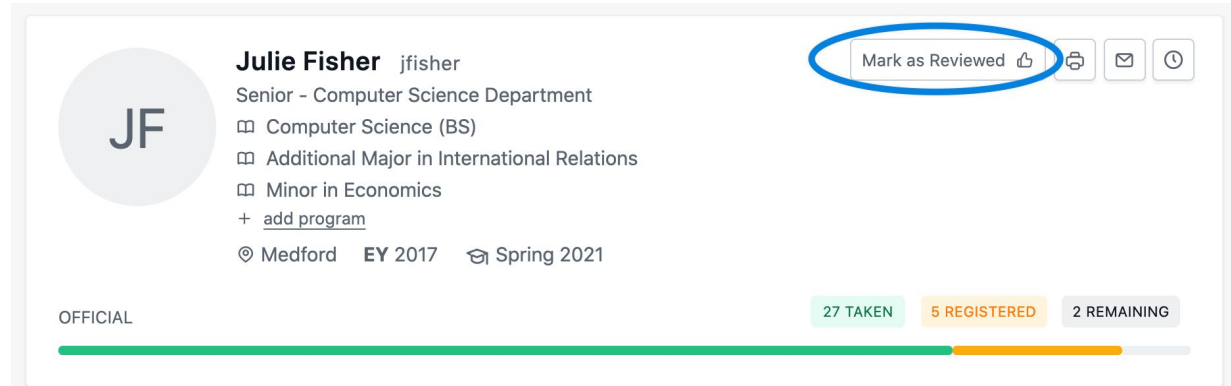
Useful Filters for Degree Clearance

Filter	Location
Expected Graduation Term	Planned
Review Status (reviewed/unreviewed plans)	Planned
Students with ungraded courses	Taken
Taken courses/requirements	Taken
Remaining credits/requirements	Remaining

Using the Review function

Use cases:

- Reviewing plans/audits prior to a student's final term
- Tracking whether or not students have made changes to a plan



Julie Fisher jfisher

Senior - Computer Science Department

- Computer Science (BS)
- Additional Major in International Relations
- Minor in Economics
- + [add program](#)

Medford EY 2017 Spring 2021

OFFICIAL

27 TAKEN 5 REGISTERED 2 REMAINING

Mark as Reviewed

Remaining Requirements Report

Use cases:

- A quick, comprehensive view of what requirements students have remaining for their declared programs
- Creating a snapshot of remaining requirements at a point in time

Audit Report Printing Options



REPORT FOR 158 STUDENTS

FORMAT

Remaining Requirements



VERSION

Official

Planned

Official version only includes taken/registered courses and enrolled programs. Does not include future courses and undeclared programs.

Create audit report

Printing Batch Audits

Use cases:

- Print/download audit PDFs for every student in your query.
- **Tip:** Remember to sort your search results prior to printing batch audits - they will print in the order they appear on your screen.

×

Audit Report Printing Options

REPORT FOR 449 STUDENTS

FORMAT

Standard ▾

VERSION

Official

Planned

Official version only includes taken/registered courses and enrolled programs. Does not include future courses and undeclared programs.

OPTIONS

☒ Include Grades

☐ Include Exception Details

Create audit report



Sneak Preview: Multi-Step Workflow Processes





Student View





Cindy Yu

First Year

BS in Computer Science

Minor in Business Administration Undeclared

[Add Program](#)

Pittsburgh Fall 2020 Expected Spring 2024



12 Taken

6 Planned

23 Unplanned

Advisor



Mark Stehlik [Schedule Meeting](#)

Stellic Engage



CQPA

3.43

Spring 2020

3.02

Interest

[+ Add Interest](#)

Spring 2020

47 Units

15-154

15-756

20-152

32-152

15-154

15-756

[Audit](#)

[Planner](#)

[Courses](#)

[Notes](#)

[Requests](#)

Spring 2020

47 Units

15-154

15-756

20-152

32-152

15-154

15-756

Audit

Planner

Courses

Notes

Requests

New Request

Computer Science Grad...



Graduation Request

Your audit will be reviewed by the computer science department. Your current academic standing will be reviewed by your primary advisor, CS department advisor and the finance team. Any concerns will be shared.

Contact Advisor

Submit Request

Audit

Planner

Courses

Notes

Requests

New Request

Select Request Type

Approved

Graduation

BSc. in Computer Science

APPROVED

Request to Review

Cindy Yu

Primary Advisor Approval

Kemal Oflazer

Comment: Looks good!

Major Advisor Approval

Primary Advisor

Comment: Looks good!

Registrar Approval

Registrar Office (Approvers)

Comment: Looks good!

Approved



Advisor View



Advisor View

Stellic...
University

< ☰

Students

Requests

Programs

Courses

Pathways

Staff

Analytics

Quick Links

Report an issue

Pilot Mode

Search

Students

Requests 3

Programs

Courses

Pathways

Staff

Keywords

Search requests, workflow, student

Filters

Status

Workflow

No Selected Filters

6 Requests

Computer Science Graduation	Cindy Yu	Primary Advisor Approval	Updated 1 month ago
Math Graduation	Matt Simpson	Primary Advisor Approval	Updated 1 month ago
Business Concentration Completion	Matthew Brodrick	Primary Advisor Approval	Updated 1 month ago
Emad Bin Ahmed	Emad Bin Ahmed	Approved	Completed 2 months ago
Atif Mehmood	Atif Mehmood	Approved	Completed 2 months ago
John Smith	John Smith	Declined	Completed 4 years ago



Cindy Yu

First Year
BS in Computer Science
Minor in Business Administration Undeclared
[Add Program](#)
📍 Pittsburgh 📅 Fall 2020 📅 Expected Spring 2024



12 Taken 6 Planned 23 Unplanned

Advisor

MS Mark Stehlik [Schedule Meeting](#)

Stellic Engage CQPA Spring 2020
★★★★ 3.43 3.02

Interest
[+ Add Interest](#)

Spring 2020
47 Units 15-154 15-756 20-152 32-152 15-154 15-756

Audit Planner Courses Notes **Requests 2**

Pending

Graduation BSc. in Computer Science PRIMARY ADVISOR APPROVAL

☒ Request to Review
Cindy Yu

☒ Primary Advisor Approval
Kemal Ofiazer

Contact Cindy Yu [Edit Decision](#)

Audit Snapshot: [cindy_yu_03_03_2020_auditsnapshot.pdf](#)

Consent: I have reviewed the students audit and have made a final decision based on Cindy Yu's current standing and taking into consideration passing grades in their final semester.

Comment: Three credits remaining

☐ Major Advisor Approval
Primary Advisor

☐ Registrar Approval
Registrar Office (Approvers)

☐ Approved

Review Request

← Previous Student Next Student →



Cindy Yu

First Year
BS in Computer Science
Minor in Business Administration **Undeclared**
[Add Program](#)
📍 Pittsburgh 📅 Fall 2020 📅 Expected Spring 2024



12 Taken 6 Planned 23 Unplanned

← Previous Student

Next Student →

☒ Request to Review
Cindy Yu

☒ Primary Advisor Approval
Kemal Ofiazer

Contact Cindy Yu [Edit Decision](#)

Audit Snapshot: [cindy_yu_03_03_2020_auditsnapshot.pdf](#)
Consent: I have reviewed the students audit and have made a final decision based on Cindy Yu's current standing and taking into consideration passing grades in their final semester.
Comment: Three credits remaining

☐ Major Advisor Approval
Primary Advisor


☐ Registrar Approval
Registrar Office (Approvers)

☐ Approved

Review Request

← Previous Student

Next Student →



Cindy Yu

First Year

🔄

🗨️

Audit

Planner

Courses

Notes

Requests 2

● Pending

Graduation BSc. in Computer Science

● PRIMARY ADVISOR APPROVAL ▼

✓ Request to Review

Cindy Yu

✗ Primary Advisor Approval

Kemal Oflazer

Contact Cindy Yu

Edit Decision

Audit Snapshot: [cindy_yu_03_03_2020_auditsnapshot.pdf](#)

Consent: I have reviewed the students audit and have made a final decision based on Cindy Yu's current standing and taking into consideration passing grades in their final semester.

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☐ Major Advisor Approval

Primary Advisor

☐ Registrar Approval

Registrar Office (Approvers)

☐ Approved

Admin Process

WORKFLOW

ACTIVE

Publish

Start Requests

...

Computer Science Graduation

☆ Graduation

👤 245 Students Enrolled

📁 2,134 Requests

▶ 3 Steps

Overview

Editor

Requests 295

Analytics

DESCRIPTION

"Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua. Ut enim ad minim veniam, quis nostrud exercitation ullamco laboris nisi ut aliquip ex ea commodo consequat. Duis aute irure dolor in reprehenderit in voluptate velit esse cillum dolore eu fugiat nulla pariatur. Excepteur sint occaecat cupidatat non proident, sunt in culpa qui officia deserunt mollit anim id est laborum."

ELIGIBLE STUDENTS

Students with Given Criteria

Degree: BS

School: School of Computer Science

Levels: Year 4, Year 5, Year 6

WORKFLOW STEPS

1

Request to Review

Student's Advisor, Student

Information Required: Comments, Consent, Supporting docs, Current Progress

2

Department Advisor Approval

Kemal Oflazer

3

Major Advisor Approval

Primary Advisor

4

Registrar Approval

Registrar Office (Approvers)

5

Approved

Admin Process

[← Back to Requests](#)

WORKFLOW INACTIVE

Architecture Graduation

☆ Graduation ▶ 1 Step

Enroll Students



Overview

Editor

Requests

Analytics

DESCRIPTION ⓘ

"Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua. Ut enim ad minim veniam, quis nostrud exercitation ullamco laboris nisi ut aliquip ex ea commodo consequat. Duis aute irure dolor in reprehenderit in voluptate velit esse cillum dolore eu fugiat nulla pariatur. Excepteur sint occaecat cupidatat non proident, sunt in culpa qui officia deserunt mollit anim id est laborum."

[edit description](#)

ELIGIBLE STUDENTS

Type

Students with Given Criteria ▼

Criteria

Program: Architecture (BS) ✕ [+ add criteria](#)

145 students are eligible

CONFIGURE STEPS

→ [Start](#) [Request to Review](#) ▼ [edit name](#)

Who can initiate the request?

☒ Student's Advisor ☒ Student ☒ Anyone with edit permission on student ☒ Specific users/groups
Finance Team, John P.

Information

Text Field	Comments	required • visible to students	
Checkbox	Consent	required • visible to students	edit
File Upload	Supporting docs	optional • visible to students	✕
Auto	Current Progress	snapshot	

[add information](#)

⋮ Step 1 [Primary Approval](#) ▼ [edit name](#)



Who can complete this step?

Relationship (required)

Relationship with student ▼

Primary Advisor

[Advanced Settings \(coming soon\)](#)

+ Add Step

✓ End [Approved](#) ▶

☒ Steps are ordered ⓘ

<http://bit.ly/degree-clearance>