Advisors User Guide

Office of the University Registrar
myDegreePlanner Version 4.4.2
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Getting Started with myDegreePlanner

myDegreePlanner is an application for running and viewing degree audits.

Degree audits are used by advisors, students, administrators, etc., to evaluate students’ progress toward a program of study completion.

The source for the student data used/displayed in myDegreePlanner is myZou.

The online version of myDegreePlanner is referred to as Self-Service (vis-à-vis a client-based part of the application, to which advisors and students lack access).

It is a web-based application; it runs in one of the supported browsers listed below without having to install additional software.

myDegreePlanner is available via Windows and Mac computers running Internet Explorer (version 9 or later), Mozilla Firefox, Google Chrome, or Safari (version 5). Limited functionality—running degree audits only—is also available via iPad (Safari only), Google Nexus 7 (Chrome only) and Samsung Galaxy tablets (Chrome only).

This guide assumes you are running myDegreePlanner on a Windows computer. myDegreePlanner runs on Apple devices as well; however, the screen/icons might be slightly different, in some circumstances, from what appears on this guide.

Log In
To log in to myDegreePlanner access https://mydegreeplanner.missouri.edu using one of the supported web browsers listed above.

The University of Missouri System application log in screen will then appear.

![University of Missouri System Log In Screen](image-url)
Enter your username and password (the same credentials you use to log in to your desktop computer), and then click the Login button.

Upon successful log in, the myDegreePlanner Self-Service Home screen will display in advisor mode.

If a Maintenance In Progress page displays instead, it means that the system is undergoing regularly scheduled maintenance. There is no need to report this is as service outage. You should simply try to log in later.

If this error appears
or some other error message displays or the screen freezes, you should report the issue to degreeaudit@missouri.edu.

If you are helping a student access myDegreePlanner, be aware that Student mode does not have a Home screen. Students are taken directly to the Request an Audit screen.

Users with Advisor and Student roles will default to Advisor mode, but clicking on the Home icon will reveal a Student Access icon which opens the Student View screen.

Home
The home icon is the first item on the gold menu bar, in all myDegreePlanner screens. Clicking on it brings you back to the Home screen.

Items on the Home screen menu bar are replicated as icons below it. You may use either to navigate around the application.

Navigation
Use the myDegreePlanner menu items/icons/links that appear in the browser’s main window to navigate the application. Do not use the browser’s menu items/buttons that appear in the browser’s header—such as the Back button—as this can result in undesirable outcomes.

The menu bars at the top of the Self-Service screen provide common, seamless navigation across screens and applications.

Advisor mode displays two menu bars: a gold one (every screen), and, below it, a gray one (every screen, except the Home screen).

Student mode displays a single gold menu bar.

The Utilities menu item provides access to custom applications. Navigation within these applications is sometimes different, and when so, it is explained in the Utilities Menu section below.

Style
You can change the application’s color via the Select your style toggle buttons that appear at the top right of the Home screen. The two choices are gold and black.

Help
Contextual help is available on some screens via the help icon and as a menu option item via the Settings icon. Click on the icon/option to access related content.

Log Out
Always log out of the application when no longer using it. This both releases system resources and prevents unauthorized use. To log out, select the Log Out option in the Settings menu, and then follow the on-screen instructions.

Search for a Student
Click the Students icon
to access the **Student Search** screen.

**Student Search**

<table>
<thead>
<tr>
<th>By Student ID</th>
<th>By Student Name</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Student ID</strong></td>
<td><strong>First Name</strong></td>
</tr>
<tr>
<td>![Submit]</td>
<td>![Last Name]</td>
</tr>
</tbody>
</table>

**Search by Student ID**
Enter the 8-digit student ID in the **Student ID** field. Then press **Enter** on your keyboard or click the **Submit** button.

If the search succeeds, the **Request an Audit** screen opens.

If the search returns no matches, the following error message displays.

```
The student with stuno and name does not exist in the u.achieve database.
```

If this happens, you should correct the student ID information and resubmit your search, or use the more powerful student search tool in myZou to find the student and run the degree audit from within myZou (in the Student Services Center, click on the **Request Degree Audit** link).

Student ID partial match searches and wildcard searches are not supported in myDegreePlanner at this time. The Student ID must match the myZou Student ID exactly. Enter the Student ID in its entirety, including leading zero(es), if any.

**Search by Student Name**
You can also search by first name, last name, or a combination of both. The searches try to match the specified criteria against person information in myZou (students and non-students), but the documentation below uses “student” instead of the more generic “person,” as typically you will be searching for a student.

Enter the search criteria into the **First Name** and **Last Name** fields, then press **Enter** on your keyboard or click the **Submit** button.

If the search succeeds, the name(s) and Student ID(s) of the matching student(s) appear.
Click the icon in the Select column to choose a student and access the student’s record; the Request an Audit screen will open.

If the search returns no matches, the following error message displays:

No students found

If this happens, you should refine your search and resubmit it, or use the more powerful student search tool in myZou to find the student and run the degree audit from within myZou (in the Student Services Center, click on the Request Degree Audit link).

The search by student name functionality supports partial matches, as follows: The search algorithm will try to match the first and last name criteria you specify to the start of students’ first and last names respectively, as they appear in myZou. No wildcard characters are necessary/supported. Searches apply the criteria in the same manner as begins with search criteria in myZou searches.

However, you should enter as much information in the First Name and Last Name fields as possible. If your search criteria are not very specific, a very large set of matches might ensue. This both slows down the system and can result in the display of an incomplete result set, as only the first 100 matches display (and there is no indication that additional matches exist!).

Request an Audit

The Request an Audit screen has three main sections: One to request an audit for the default program/catalog year (Run Declared Programs), one to request an audit for a different program/catalog year (Select a Different Program), and a section with several fields to configure your request by changing the default settings (Advanced Settings).
Run Declared Programs
This is the default option for the **Request an Audit** screen, and, therefore, is the only one that fully displays when first accessing the screen.

The displayed grid includes all programs of study (majors, minors, certificates, etc.) associated with the student in myZou, for which a degree audit exists.

Click on the **Run Declared Programs** button to run an audit for all listed programs. If multiple programs are listed, and you wish to run an audit for a single declared program, you will need to use the what-if feature described below (**Select a Different Program**).

Wait until the **Completed Audit Requests** screen stops updating (see additional notes below re information/options that will display on the **Completed Audit Requests** screen).

The just completed audit(s) will be added to the existing list of previously executed audits (if any). It is from this screen that you will be able to access the audit results. Refer to the section on **View the Audit** for additional details on accessing the results.

Additional notes regarding the **Completed Audit Requests** screen: While the audit request is processing, the screen will display an informational segment at the top.

It provides options to stop (**stop**) and to cancel the request (**Cancel Running Audits**).

If you click the **(stop)** option, the display will stop refreshing every three seconds.

If you click the **Cancel Running Audits** link, the **Completed Audit Requests** screen opens.

In neither case does the audit actually stop running. To see an audit that was stopped or canceled as described above, you will have to navigate to **Audits > Manage** and select the (typically) most recent audit on the list.

Select a Different Program
When first accessing the **Request an Audit** screen, an alert appears if the student has no matching declared programs in myZou:
If this happens, you can select a different program. You should also select a different program if the student is associated with multiple programs of study and you wish to run an audit for a single program, or, if you wish to run an audit for a program/catalog year other than the default one(s) (what-if functionality).

To select a different program, click the Select a Different Program link. This minimizes the Run Declared Programs area, expands the Select a Different Program area, and allows for selection of a different program/catalog year.

Select the Academic Unit of the program, then select the Program, and Catalog Year. Each selection filters the options in the box below, narrowing down the options for ease of use. If you are unsure of the academic unit in which a program resides, set the Academic Unit field to blank, and a full listing of all programs for which a degree audit is available will be display in the Program drop-down list.

Click on the Run Different Program button to run an audit for the selected program/catalog year.

The audit report will automatically open once the audit finishes processing.

The report will display a message indicating that the audit report was generated using an alternate program and/or catalog year:
Note: The values entered in the Select a Different Program area remain until you exit the application, even if you switch to a different student. However, the Run Declared Programs option is always the default. To reuse the criteria previously entered in the select a different program area, you must click on the Select Different Program link before you run the next audit.

Advanced Settings

The Advanced Settings section of the screen includes several fields that allow you to set options for each audit by changing the default settings.
To display the fields, click on the Click to view available options link that appears to the right of the Advanced Settings section header.

The In Progress Courses checkbox determines whether a student’s in progress (IP) courses will be included in the audit. This option defaults to checked; thus IP courses will be included unless you uncheck the box.

The List All drop-down selection determines which requirements and details to include in the audit. The options are:

- Default: This is the standard report.
- Include Pseudo: This report includes requirements and subrequirement “names,” which are referred as “pseudo-course” (pseudo, for short). Some exceptions require you to manually enter a pseudo, in which case you might have to run an audit with this option to figure out the pseudo you should use. If the pseudo still doesn’t show, try using the Full Listing setting.
- Full Listing: The report includes information about the encoding underlying the degree audit. Used mostly to debug new audits, and the like.

The Planned Courses checkbox determines whether a student’s planned courses will be included in the audit. This option defaults to unchecked; thus, planned courses will not be included unless you check the box.

The Run Type drop-down selection determines the order of courses listed. Options are:

- D-Degree Audit: The default.
- S-Audit w/Course Sort: Use only if the student’s record includes what-if/planned courses, to force these courses to sort ascendingly by term.

The Format drop-down allows you to choose the audit report format. Options are:

- HTML: The default and recommended format.
- PDF (single column): This format generates a PDF version of the HTML audit. Note that this is not the traditional 2-column PDF (known in myDegreePlanner as the 2-column PDF); the 2-column PDF is available through the Utilities menu after the audit run completes and the HTML- or PDF-formatted report displays, and also via the custom Batch application.

The SOPRID drop-down allows you to choose who can see the audit report. Options are:

- Advisors: The default value; advisors and degree audit staff can see the report.
- Students: Advisors, degree audit staff, and the student can see the report.

The COM field allows you to bring in a number of predefined options stored in an external table. The default option is the ONL table. At this time, there is only one other table to pick from: NOFTR. The NOFTR table has a setting that causes future term(s) coursework to be excluded from the audit; this can be useful for athletic certifications, and other similar processes.

Note: The advanced settings apply to audits run under either the Run Declared Programs or the Select a Different Program sections above. They do not “stick” from run to run, but instead reset to the default settings after each audit completes, so that an audit does not execute with unintended settings.

View the Audit Report
Reports from previously ran audits display in the **Completed Audit Requests** screen. The reports can be in HTML or PDF format.

<table>
<thead>
<tr>
<th>Program</th>
<th>Catalog Year</th>
<th>Type</th>
<th>Includes IP/Planned Courses</th>
<th>Format</th>
<th>Prepared By</th>
<th>Prepared On</th>
<th>Delete</th>
</tr>
</thead>
<tbody>
<tr>
<td>History (BA)</td>
<td>Fall 2017</td>
<td></td>
<td></td>
<td>HTML</td>
<td>kochra</td>
<td>08/24/2017 2:58 PM</td>
<td></td>
</tr>
<tr>
<td>History (BA)</td>
<td>Fall 2017</td>
<td></td>
<td></td>
<td>PDF</td>
<td>kochra</td>
<td>08/24/2017 2:58 PM</td>
<td></td>
</tr>
</tbody>
</table>

The **Completed Audit Requests** screen opens automatically after a default program audit finishes executing. (This screen is bypassed for what-if audits, as the report opens automatically.)

To access the **Completed Audit Requests** screen without running an audit, click on the **Manage** option of the **Audits** menu item on the gray menu bar.

The screen displays a grid: one row per audit report and, within that row, the following fields:

**Program:** The program of study used in the degree audit.

**Catalog Year:** The catalog year used in the degree audit.

**Type:** The icon displays if the audit report is generated via the **Select a Different Program** option.

**Includes IP/Planned Courses:** The icon displays if the audit includes in-progress coursework. The icon displays if planned courses are included (planned courses may also include in-progress courses).

**Format:** The icon displays if the report is in HTML format. The icon displays if the report is in single-column PDF format (see the **Advanced Settings** section above for details).

The **Prepared By** and **Prepared On** fields display information about who created the report and when.

The last column on the grid allows selection of reports for deletion. Once selected, the report(s) can be deleted by clicking on the **Delete** button. Below the **Delete** button, the **select all/select none** link allows selection/deselection of all reports at once.

By default, the most recent degree audit report displays at the top, with the rest displaying in descending order of preparation. You can change the sort order by clicking on any of the hyperlinked column headings.

To open one of the listed reports in the viewing screen, click on the hyperlinked program title in the **Program** field (first column).

The report-viewing screen includes a header, and below it three tabs: **Audit Results**, **Course History**, and **Exceptions**.
Screen Header
The header includes data about the student, the audit’s program of study, and the audit itself, including a unique job ID. You should always provide the value in the Job ID field when reporting a problem/concern about a specific audit report.

It also includes a shortcut Request Audit button; clicking on it returns you to the Request an Audit screen.

When viewing HTML reports, advisors with an exception-creation role also see an Enter Exception Mode button; clicking on it sets the audit report in exception entry mode, which is the recommended best practice for exception entry. Refer to the HTML Report Exceptions Mode section below for detailed instructions about creating exceptions via the HTML report.

Audit Results Tab
This tab displays the audit report, in either HTML (default) or PDF format (see the Advanced Setting section above for information on how to select report formats). The reports are static; they do not refresh each time you view them. The reports are visible for seven days; then they disappear. To access a current report, request a new audit, which will generate a new report.

The reports have three sections: a header, the body/main section, and a footer.

Report Header
The header displays information about the student’s plan(s)/subplan(s) (majors, minors, certificates, emphases) with an active status in myZou, the associated advisor(s), and expected graduation date(s).

<table>
<thead>
<tr>
<th>PLAN / SUBPLAN</th>
<th>ADVISOR</th>
<th>EXPGRAD</th>
</tr>
</thead>
<tbody>
<tr>
<td>Business Administration-MBA</td>
<td>Hedges, Kimberly Ann</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Ridgway, Robyn Ann</td>
<td></td>
</tr>
</tbody>
</table>

The information for each plan/subplan program of study (including advisor information) ceases to display once the student completes the plan/subplan.

It is then replaced by information concerning the completed program of study. This includes certificates, minors, emphases, and degrees earned at Mizzou.

<table>
<thead>
<tr>
<th>INSTITUTION / PRIOR DEGREE</th>
<th>EMPHASIS</th>
<th>DATE</th>
</tr>
</thead>
<tbody>
<tr>
<td>UNIV OF MISSOURI-COLUM</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Political Science-BA</td>
<td></td>
<td></td>
</tr>
<tr>
<td>UNIV OF MISSOURI-COLUM</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Amer Const Democracy-CERT</td>
<td></td>
<td>05/2017</td>
</tr>
<tr>
<td>UNIV OF MISSOURI-COLUM</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Multicultural - CERT</td>
<td></td>
<td>05/2017</td>
</tr>
</tbody>
</table>

Degrees earned elsewhere also display, if recorded in myZou.

Below this section, a summary line reports whether all of the audit’s program of study requirements have been met.
Variations of these messages display if in-progress and/or planned courses are included in the audit.

**Report Body**

Most reports begin with text outlining introductory information or general requirements (e.g., for undergraduate degrees, General Education requirements), then list program of study specific requirements, both required (numbered) and optional (not numbered).

The HTML report main section is described in detail below, in the *Navigating the HTML Audit Report* section.

The traditional 2-column PDF report displays via the *Utilities* menu option (see the *PDF (two columns) Audit Report* section below).

The single-column PDF report displays in a container window:

If the window does not open by default, you need to configure your browser via the browser’s applications options (set the PDF-documents viewer to “preview in browser” or similar option).

The window includes various browser-dependent options to view, navigate, print, and download the report. It displays only a small portion of the report at the time; it is not designated for use as the primary report-viewing tool. Once you are satisfied that you are looking at the correct report, you should download it and view it in your regular PDF document viewer.

You may also download the single-column PDF report via the *Download PDF Audit* link that appears immediately below the *Audit Results* tab label.
Report Footer
The report footer includes four sections:

1) Signature lines
2) Information about PDF and 2-column PDF report codes (*), course codes, and special grades.
3) A FERPA confidentiality warning.
4) A brief description of exceptions that applied to that specific degree audit (memos entered by advisors when creating exceptions).
   (*) The HTML report includes icon representations of these codes. See the Key/Legend section below for details re these icons.

Navigating the HTML Audit Report
HTML reports initially display in abridged mode, with only requirement headers showing. Additionally, several informational and navigation items display to the right of each requirement.

Opening and Closing Requirement Sections
Use the Open all Sections or Close All Sections links or icons (  ) located below the Audit Results tab to open (display details) or close (hide details) all requirement sections at once.

Sections that are closed display with a right-pointing icon next to them. Sections that are open display a down-pointing icon. Clicking on these icons opens/closes one section at the time.

Key/Legend
An abbreviated key/legend of the informational icons that appear to the right of each requirement/subrequirement displays at the bottom of the HTML report.

Additionally, clicking on the icon opens the full key for the HTML report, describing icons, course codes and special grades.
To close the key screen, click the **Close** button.
On the far right side of the **Audit Results** display is a link to a “printer friendly” version of the HTML report.

Clicking on this link opens a new browser tab displaying the HTML report by itself (no frames/tabs/buttons/etc.). To print it, use the browser’s printing functionality.

Close or switch tabs to return to the **Audit Results** window.

**Requirements/Subrequirements**

The report body includes information about required, optional, and informational requirements, and the requirement’s subrequirement(s). Whether a given requirement/subrequirement displays and the level of detail that displays is determined dynamically at run time based on existing coursework, exceptions, other programs of study, report detail level, etc. e.g., an informational subrequirement indicating whether a student is on academic probation might only display if the student is actually on probation, or if running a **Full Listing** report.

**Requirements**

Typically, requirements include:

- a requirement number,
- a title,
- a summary line indicating the number of hours or subrequirements (referred as sub-groups) needed/earned to complete the requirement, and
- subrequirements.

Optional requirements do not include a requirement number; **OPT** appears instead.

Informational “requirements” are also unnumbered, and typically contain no subrequirements; they may contain instructions, descriptions, examples, or serve as section separators. e.g., the signature line.

**Subrequirements**

Typically include:

- a subrequirement number,
- a title,
- a summary line indicating the number of hours or courses (referred as groups, as it could be a course, or a set of ANDed courses) needed/earned to complete the subrequirement, and
- lists of courses that the student
  - has taken,
  - can take (**SELECT FROM**), or
  - can’t take (**NOT FROM**) to fulfill the subrequirement.
It may include an icon denoting that the subrequirement is required (vis-à-vis an option from among a set of subrequirements).

<table>
<thead>
<tr>
<th>Missouri state constitution requirement</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>1) Selected United States History and Political Science courses (complete one course):</th>
</tr>
</thead>
<tbody>
<tr>
<td>NEEDS: 1 course</td>
</tr>
<tr>
<td>SELECT FROM: HIST 1100, 1200, POL SC 1100, 2100, HIST 1400, 2440, 2210, 4000, 4220, 4230, POL SC 1700</td>
</tr>
</tbody>
</table>

Informational subrequirements do not “count-up” to the number of subrequirements needed to fulfill a requirement; rather, they provide information only. E.g., the Latin Honors subrequirement may inform an undergraduate student concerning honors eligibility based on current cumulative grade point average.

4) Latin Honors eligibility: Students who have at least 50 MU hours and a cumulative MU GPA of 3.0 or higher may be eligible for Latin honors. For those students, Latin honors will be determined based upon the higher of the following GPAs: MU Cumulative GPA and last 50 MU hours GPA.

- Summa Cum Laude - 3.9 - 4.0 GPA
- Magna Cum Laude - 3.7 - 3.899 GPA
- Cum Laude - 3.5 - 3.699 GPA

A “Requirement Waived” notation appears if the subrequirement has been waived via exception.

<table>
<thead>
<tr>
<th>1) Biological Science</th>
</tr>
</thead>
<tbody>
<tr>
<td>0.0 credits added</td>
</tr>
<tr>
<td>Requirement Waived 0.0</td>
</tr>
</tbody>
</table>

Courses included in SELECT FROM and NOT FROM lists are hyperlinked.

<table>
<thead>
<tr>
<th>4) Honors courses that can count as Biological or Physical Sciences.</th>
</tr>
</thead>
<tbody>
<tr>
<td>SELECT FROM: GN HON 2450H, 2461H, 2462H, 3450H</td>
</tr>
</tbody>
</table>

to a pop-up screen displaying course information, if there is an exact match to a course in the current myZou catalog.
A description of STAT 1300 is shown below. Would you like to add this as a planned course?

![STAT 1300 course description]

To add the course to the student’s planned courses list, click on the **Add** button (see the *Planned Courses Screen* section for additional details). To close the screen, click the **Cancel** button.

**HTML Report Exceptions Mode**

Advisors can have one of two levels of access: create/edit/read exceptions, or read-only. The functionality described in this section and the *Exceptions* section further below assumes you have access to add exceptions. If you have read-only access to exceptions, functionality will be limited to those screens that display already existing exceptions.

Within myDegreePlanner there are two ways to create exceptions to a student’s program of study’s requirements/subrequirements: Starting from the HTML report, and through the *Exceptions* screen available via the gold menu bar. The recommended method for creating exceptions is via the HTML reports screen. Exception data editing however, is always done in the *Exceptions* screen accessible via the gold menu bar.

This section provides an overview of the exceptions mode, which is available from within the HTML reports viewing screen only. For details concerning specific exceptions, see *Appendix I*.

To enter exception mode, make sure your browser displays on a landscape-oriented monitor (vs. portrait) as you will need quite a bit of horizontal space to display the various parts of the screen, and then click on the **Enter Exception Mode** button on the top right corner of the screen. Once clicked, the button changes to
Exit Exception Mode. A list of the student’s existing exceptions (if any) will show in the top right corner of the screen.

**Exception Icons**

Exception icons appear to the right of the requirements and subrequirements. The icons are color-coded according to the level (gray = requirement, orange = subrequirement, green = course).

There are sixteen types of exceptions available via myDegreePlanner. The following icons correspond to exception types directly accessible in exception mode. They allow you to create the eight most common/simple exceptions.

- **Force requirement complete (WR)**
- **Edit requirement (RM)**
- **Force subrequirement complete (WR)**
- **Edit subrequirement (RM)**
- **Force course (CP)**
- **Add course to Select From (I)**
- **Remove course on Select From (D)**
- **Swap course on Select From (S)**
Create an Exception

To create an exception while in exception mode, first, ensure that you locate the icons at the appropriate level (requirement, subrequirement, or course), then click on the desired icon.

A pop-up screen will open, typically to the right of the requirement/subrequirement (it may also open at the bottom of the screen, if the screen resolution is such that the pop-up will not fit on the side).

Some exception entry screens have only one tab, while others have two or more.

Enter the exception details pertinent to the exception type in the fields that appear in the tab(s).

The following fields are located on the **Verify & Save** tab for all exceptions.

- **Restrict to this Degree Program**: This checkbox defaults to checked. Do not uncheck the box.
  - Unchecking this box would make the exception global (potentially applicable to all Mizzou programs of study!).
  - If you need to create an exception that applies to all programs of study within an academic unit (semi-global exception), see the **Exceptions Screen** section below.

- **Audit Note**:  
  - WR exception only: Field is auto-populated with “Requirement Waived” text. Do not edit.
- WH exception only: Field is auto-populated with "Hours Waived" text. Do not edit.
- Other exceptions: You may enter a brief note that will appear in the subrequirement area of the audit (limited to 27 characters).

- **Memo:** Always enter a memo describing the exception.
- **Authorized by:** This field is auto-populated with your userID but it can be changed. It should contain the name of person who authorized the exception (not the operator creating the exception, unless the two are the same person).
- **Date:** This field is auto-populated. It should reflect the exception’s authorization date.

There is a second set of hidden userID and timestamp fields that record who actually created/last modified the exception.

See *Appendix I* for specific instructions regarding other fields in each exception type.

The following buttons allow you to save and/or cancel the modification/creation of an exception:

- **Save & Run Audit:** Click to end exception entry and generate a new audit report.
- **Save & Add Exception:** Click to enter multiple exceptions before creating a new audit report.
- **Cancel:** Click to exit exception entry/modification without saving any of the entered information.

To complete the process, you MUST click the **Save & Run Audit** or **Save & Add Exception** button. Exiting the exception screen without clicking one of these buttons is equivalent to clicking the **Cancel** button (no data is saved, and focus returns to the main HTML report screen). Reports generated via the **Save & Run Audit** button default to HTML format. If you wish to run an audit in single-column PDF, click the **Save & Add Exception**, and then request an audit via the standard interface (see the Advanced Settings section above).

The **Advanced Exceptions** icon provides a shortcut to the Exceptions screen. This screen allows creation of all exception types (e.g., Course Substitution - CC). It includes advanced options for the exceptions listed above that are not available in the simplified interface available via exception mode.

Whenever you need to create an exception via the Exceptions screen (because the tabbed interface available via HTML mode does not provide sufficient level of detail for the exception or because the exception is not available via HTML mode), always access the Exceptions screen via the icon (vis-à-vis the Exceptions menu item on the gold bar), as this will prepopulate a number of key fields.

See *Appendix I* for additional details on each exception type.

**Course History Tab**

This tab displays coursework information, up to 32 terms, both on-campus and transferred-in, as recorded in myZou. Planned courses appear if such courses where included in the audit request that generated the report you are viewing.

You can change the sort order by clicking on the hyperlinked column headers. You can also filter the list by selecting values for the **Grade** and/or **Term** drop-downs, and then clicking the yellow arrow icon. To return to the full list, select the default **Grade** and **Term** values in the respective drop-downs, and then click on .
Exceptions Tab
This tab lists all the exceptions that could apply to the audit, which might be a subset of all exceptions that exist for the student. The full list of exceptions for the student is available via the Exceptions screen (see the Exceptions Screen section below).

Exceptions appear in the order in which they were created. You can change the sort order by clicking on the hyperlinked column headers. You can also filter the list by using the Code drop-down, selecting an exception code, and then clicking on the yellow arrow icon \(\Rightarrow\). To return to the full list, select the default Code value in the drop-down, then click on \(\Rightarrow\).

Planned Courses Screen
To access the Planned Courses screen, select the Courses item from the gray menu bar.

The planned courses screen allows advisors (and students) to add courses to an audit to simulate their effect on program of study completion.

Courses listed in the Planned Courses screen appear on an audit report/courses tab if the audit request that generated the report was configured to include them in the Advanced Settings. Inclusion of planned courses in the audit is not the default option.

You can change the listed courses sort order by clicking on the hyperlinked column headers. You can filter planned courses by selecting a value in the Term field and clicking on the yellow arrow icon \(\Rightarrow\). To return to the full list, select Term in the drop-down and then click on \(\Rightarrow\).

Adding a Planned Course
- Click the Add Planned Course button.
- Select a Term for the course.
- Select the Course subject code and course number using the drop-down lists of values located under the Course field. The Title will automatically populate once the course number is selected. You can also type in the subject and course number information directly into the Course field, but this is not considered best practice, as it can lead to invalid course data. If you choose to type in the course information, separate the subject code and the course number with a backslash only. This will ensure proper spacing at save time. e.g., MATH\1100.
  This is a required field.
- Enter the credit hours in the RCredit field.
  This is a required field.
- Enter the expected grade in the Grade field.
  This is a required field.
- Enter the course title in the Title field (automatic if course subject/number is selected via dropdowns).
- Ensure the three required fields above have values, and then click on Add To List to save the planned course. If all required fields are not present, an error message will display and all data for the course will be discarded.
- You may enter a single course or multiple courses. Click the Return button when done entering courses.
Exceptions Screen

The Exceptions screen displays select information about all existing exceptions for a given student. The screen is available in read-only mode to advisors lacking create/modify exceptions access.

Exceptions

Certain exceptions are unavailable via Self-Service (they are “unconfigured”). They can only be entered/modified by staff in the University Office of the Registrar.

Viewing an Exception’s Details
Clicking on an exception’s hyperlinked Code value displays all the available information for that exception.
Adding a New Exception

- Click on the **Add Exception** button.

Note: It is strongly recommended that exceptions be added via the ![icon](image) icon available in HTML exception mode. This prepopulates a number of the fields listed below.

- **Choose an Exception Type** by clicking on the hyperlinked value for the **Exception Code** or **Description** field.

- Select a value for **one** of the following two fields:
  - **Academic Unit** (AU) only if you need to create a semi-global exception applicable to all programs of study within an academic unit, or
  - **Program Code** to create a program of study specific exception.

There is no need to select a value for the AU if you need to create a program-specific exception, but doing so narrows down the list of values in the **Program Code** field to those programs in the AU only, thus avoiding possible mistakes caused by similarly titled programs of study in different AUs. If you choose to filter the program values this way, be sure to blank out the AU after you select the program.
This will ensure that the exception will continue to apply to the program of study, even if it moves from one AU to another.

Never leave both fields blank, as that would create a global exception, potentially applicable to all programs of study at Mizzou!

- **Memo:** Always enter a memo describing the exception.
- **Authorized by:** This field is auto-populated with your userID but it can be changed. It should contain the name of person who authorized the exception (not the operator creating the exception, unless the two are the same person).
- **Date:** This field is auto-populated. It should reflect the exception’s authorization date.

There is a second set of hidden userID and timestamp fields that record who actually created/last modified the exception.

- See *Appendix I* for specific instructions regarding other fields in each exception type.
- Click the Save button to save the exception details and return to the Exceptions screen. Or click the Cancel button to end the exception creation process without saving the data.

**Editing an Existing Exception**

- Click on the Edit icon to edit an exception’s details.
- Edit as needed, then click the Save button.
- To cancel editing without saving changes, click the Cancel button.

**Deleting an Exception**

Click on the Delete checkbox on the row of the exception you need to delete, and then click the Delete button.

There is also a select all/select none link below the Delete button, allowing for selection/unselection of all exceptions. Use with care, as deletions are irreversible; there is no undo button.

**Note:** The title of the viewing, adding, and editing screens described above can be misleading, as it is the concatenation of the words "Details", "Add", or "Editing" respectively, and the exception’s title. e.g., "Insert Detail" means you are viewing an Insert exception’s details, "Add Delete" means you are adding a Delete exception, "Edit Delete all Courses in an AND or OR Set" means you are editing a very specific type of Delete exception (code DO), and the like.

**Utilities Menu**

The Utilities menu item in the gold menu bar provides access to three custom applications: **PDF (two columns)**, **UM Batch**, and **Photo**.

**PDF (two columns) Audit Report**

The option to display the 2-column PDF report is available from the report-viewing screen of HTML- or PDF-formatted audit reports only (**Audit** menu item, **Manage** option, **Program** column hyperlinked value). An error message displays if you select this option from any other screen.

This option is only available from within an existing audit report (Audits, Manage, Program).

It does not execute a new audit. It merely displays an existing audit report in a different format.
Therefore, if you need to see current results, you must run a new audit first (HTML- or PDF-formatted report, it does not matter which), and then select the **PDF (two columns)** option.

Selecting the **PDF (two columns)** option of the **Utilities** gold menu item either opens a PDF document in the application associated with PDF documents viewing (if one is configured), or asks that you select a suitable viewer, or prompts you to save the document (these options are browser/OS dependent). If you are unable to access the 2-column PDF report, without receiving the error message noted above, you may need to ask your local IT person for assistance with configuring your PDF document viewer.

### UM Batch

The batch custom application allows you to run audits for multiple students with a single request.

It consists of two screens: One to create batch requests and one to view the results.

Selecting the **UM Batch** option of the **Utilities** gold menu item, opens a new browser tab displaying the **Batch Request Screen**.

The batch request screen has four sections for entering criteria for the batch request, which correspond to three functions:

1. Selecting a student population (manual entry, one at a time, via the **Select Students** section; or in bulk, via the **Upload IDs** section, where the **Select Files** and **My Advisees** buttons are located),
2. selecting an alternate program of study, and
3. setting advanced options.

These are functionally equivalent to the **Student Search**, **Select a Different Program**, and **Advanced Settings** features of myDegreePlanner.

You can run a batch for a single student, a few students, or thousands of students. Very large batches should be executed during off-business hours to ensure adequate performance for all users.
Select Students

Manual Entry
Click the plus symbol to add the first Student ID. Enter all eight digits, including any leading zeros, and press the Tab key.

<table>
<thead>
<tr>
<th>Select Students:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Student ID</td>
</tr>
<tr>
<td>Empty</td>
</tr>
</tbody>
</table>

The student’s name, myZou declared program(s) of study, program code(s), and catalog year(s) will auto-populate. If some of this information is unavailable, the pertinent fields will remain blank.

To add additional students, simply press the Enter key instead of the Tab key, and repeat the process.

Upload IDs
Rather than typing individual Student IDs, you may upload a file containing multiple Student IDs.

Supported file formats include Excel, Word, TXT, and CSV.

The upload tool attempts to match all numbers in the file to Student ID numbers, including prepending zeros to numbers that are less than eight digits long. Therefore, the file should contain no other numerical information beyond the Student IDs.

To upload a file, either click the Select Files button to open your operating system’s file browsing tool and select a file, or drag and drop file into the drop box below the Select Files button, or click the My Advisees button (to upload information for all students for whom you are a designated advisor in myZou).

The students in the file, or the advisees’ information, overwrite previously selected students, unless you first select the Append checkbox.

A spinning wheel will display when processing a file containing large number of Student IDs.

Manage Selected Students
Entering an invalid Student ID results in an - Invalid Student ID – error message in the Name field. Uploaded invalid Student IDs list at the top of the grid.
Multiple active programs of study in myZou will result in multiple rows for the same student (this is OK).

If a valid email exists in myZou for the student, the student’s name will be hyperlinked to that email address.

You may select/unselect single rows via the checkbox located to the left of the Student ID field.

You may select/unselect rows listing non-major programs of study by clicking the Select Majors Only checkbox.

You may unselect rows listing completed programs of study by clicking the Exclude Completed checkbox.

You may unselect rows listing programs of study not matching the program of study selected in the Program field, by clicking the Selected Programs Only checkbox.

Please note: After a row is unselected due to checking one (or more) of the three checkboxes (Select Majors Only, Exclude Completed, Selected Programs Only), you can still force individual rows to be included in the batch by manually reselecting the individual row (click on the checkbox to the left of the student Name field).

You may add or delete rows via the icons.

You may also delete selected rows by clicking on the trashcan icon.

To adjust the Name or Program column width, click and drag the header columns separator (vertical bar between header fields).

You may sort the list of students by clicking on the hyperlinked column headers (Name, Program, Program Code, Catalog Year). Note: The order on the screen will determine the order in which the audit reports will appear in the view audits screen and resulting combined file.

Select a Different Program/Catalog (What-If)
This section is optional. Executing a batch with the default values in place will run audits for the students’ default program(s) of study/catalog(s).

You may use the drop-down lists of values (LOV) for Academic Unit, Program and Catalog Year to select a single program of study and/or catalog year for all selected students.

When you select a value(s) for the Program or Catalog Year, the corresponding values in the Select Students grid will be struck-through for each affected student, as a visual indicator that the selected program/catalog year value(s) will be utilized instead.

To unselect a value from an LOV, select the default value as shown above. You will see the strikethrough disappear from the student rows for the corresponding field(s).

Advanced Options
This section is optional. The fields in this section are generally equivalent to those in the myDegreePlanner Request an Audit screen (see the Advanced Settings section above; note that the SOPRID field is labeled Visibility).
One small difference is that the default value for the **Format** field is the *TXT* option (the equivalent of the 2-column PDF report). Unlike reports produced with the *HTML* and *PDF* options, reports generated with the *TXT* option are not visible via Self-Service.

**Request Audits**

Click on the **Request Audits** button to submit your request.

The screen will indicate the number of audits submitted. A spinning wheel displays during the initial batch submission process.

**View Audits**

You may click on the **View Audits** button at any time after clicking on the **Request Audits** button.

The view results screen will open, displaying a grid of all of the batches that you have submitted, one row per batch. Each row displays: a unique batch number (*Uymmddhhmm#####*), a **View All** button, a **Download All** button, a date and time stamp, and a batch processing status (*Queued*, *Executing*, or *Done*).

The screen refreshes every 5 seconds. You may use the refresh button to refresh the screen more frequently. Once the batch job completes, the status changes to *Done*.
You may use the up or down arrow on your keyboard to navigate between rows, and the right and left arrows to move within a row.

Use the select check boxes (or press the space bar) in conjunction with the trash can button to delete batches you no longer need.

**View All** opens a single PDF document that includes all audit reports.

**Download All** downloads one zipped file with individual PDF files for each audit in the batch. The individual PDF audit documents are named StudentID_dprog_date_jobid_sequence#.PDF.

For batches that are **Done**, a plus symbol displays to the left of the batch number.

Select the row for the batch you would like to view, then click on the + symbol or press the Enter key, to see a detailed list of the individual audits included in the batch.

To expand/collapse all batch rows listed, click the icons at the top of the grid.

For each individual audit, the Student ID, name, program, program code, and catalog year display, along with an overall requirements status indicator (✔ all requirements are met, ✗ some requirements are not met, ⚠ there was an error when attempting to run the audit).

You may use the up or down arrow on your keyboard to navigate between rows, and the right and left arrows to move within a row.

You may adjust the student name and program name columns by clicking and dragging the handles that display above and below the batch details grid.

Click on the **View** button next to the Student ID to open a PDF document containing the audit report for that student/program/catalog year.

Note that all reports viewed within the Batch application will be in the 2-column PDF format. Additionally, audit reports for batch requests with the value of the **Format** field set to HTML or PDF are visible via Self-Service in either HTML or PDF format respectively.

Click the exit icon ✗ to return to the batch request screen.

To switch back to myDegreePlanner, select the myDegreePlanner browser tab.

To close the batch request screen and return to myDegreePlanner, close the browser tab containing the batch application.
Photo
This **Utilities** menu option is available from any myDegreePlanner screen that is associated with a single student.

It displays the student’s myZou picture (if one is available).

**Settings Menu**

The Settings menu item in the gold menu bar provides access to the **Help** and **Log Out** options.

**Help**
Clicking on the **Help** link opens this document online. Students see a similar document.

**Log Out**
To log out of myDegreePlanner, select the **Log Out** option from the **Settings** menu, and follow the onscreen instructions.
Appendix I: Exceptions

This section provides detailed information on the steps to create/modify each type of exception.

The following “common fields” appear in nearly all exception-entry screens: Academic Unit, Program Code, Audit Note, Memo, Authorized by, and Date. They are fully described in the Create Exception and Add a New Exception sections above.

Manual Course Entry

Most fields that accept course information have associated list-of-values or type-ahead functionality to simplify course entry. You should try to use such functionality whenever possible, to reduce the risk of data errors. However, in some circumstances you may need to enter course data manually, or adjust previously entered course data. When doing so, keep in mind the following guidance.

The total length of course information fields is 16 characters. Courses are identified by subject code (e.g., MATH) and course number (e.g., 1500).

Subject codes:
- contain letters and underscores only (no numbers or spaces)
- have a maximum length of 8 characters
- begin on position number 1 of course information fields.

Course numbers:
- begin on position number 9
- are always 4 numeric characters long if an MU course
- are a string of up to 6 alphanumeric characters if a transfer course
- may include an additional suffix of up to two letters to indicate that the course is an honors and/or writing course (H, W, or HW).

Rather than counting spaces to ensure that subject codes and course numbers are properly spaced/start in the right position, separate the two values with a backslash without including any blank spaces. e.g., MATH\1500. myDegreePlanner will then properly space/align the course information at save time.

Sections of a course are never entered as part of course information, but courses sometimes need to be further identified by specifying the term(s) in which they were offered, and/or the title of the specific section/offering. When that is required, additional fields are provided.

myDegreePlanner matches courses taken by the student to courses in the SELECT FROM and NOT FROM lists starting from the leftmost character and then matching each character to the right, space by space. Therefore it is important to ensure that the number part of the course information starts exactly on position 9.

The match all “wildcard” character is the asterisk (*). e.g., a subrequirement looking for MATH 2*** will accept MATH 2001, 2100, etc.; it will also accept MATH 2100W and MATH 2001A because myDegreePlanner doesn’t stop matching characters until it reaches the 16th position of a course information field.

If you would like for the matching to stop at certain point, include a pound symbol (#) in that position. e.g., BIO_SC\BIO would match BIO_SC BIO, BIO_SC BIO1, and BIO_SC BIOL, but BIO_SC\BIO# would only match BIO_SC BIO.

Please note: Course information prior to Fall 2004 has varying lengths, but you should always enter the current course number, even if the student took the course under the prior nomenclature. myDegreePlanner will typically automatically convert the old course number to the new one. If it doesn’t, contact degreeaudit@missouri.edu for assistance, so that the course can be added to the convert table.
Exceptions Available in both Exception Mode and the Exceptions Screen

You can create the following exceptions via exception mode while in an HTML report, by clicking on the appropriate icon. You can later edit the exception’s details as needed via the Exceptions screen.

You can also initiate the exception creation process while in exception mode by clicking on the advanced exceptions icon and then completing the process in the Exceptions screen. You should do this whenever the options provided by the simplified exception screens/tabs in exception mode are insufficient to articulate the exception’s details fully.

Lastly, you can create these exceptions in the Exceptions screen directly. This is not recommended, as fields such as the academic unit, program of study, pseudo course information, etc., will not be automatically populated.

**CP — Force Course into Subrequirement**

The CP exception forces a course into a subrequirement and overrides condition codes. Do not use the force course exception if you want the requirement/subrequirement to monitor those condition codes. If you want condition codes to be respected, you should use the Insert exception icon instead.

To force a course into a subrequirement, move the course from the course list into the Course Forcing box by clicking the add icon.
Only courses which the student has taken or added to the list of planned courses appear on the list. Therefore, if a course is not showing on the list, you should ask the student to add it to the set of planned courses. You can also manually add a course via the **Exceptions** screen, but this is not recommended.

You can force only one course per exception.

Undo a course addition by clicking the **Delete** icon.

After you select the course, click the **Next** button or the **Verify & Save** tab.

The **Exceptions** screen for the Force Course (CP) exception lists a number of additional fields, none of which you should set/modify.

The **I** exception adds a course to a subrequirement’s **SELECT FROM** or **NOT FROM** line.

---

**Add Course Exception**

**Subrequirement**

Writing intensive from anywhere in the curriculum

1. **Add Course**

2. **Verify & Save**

**Find the course you want to use:**

<table>
<thead>
<tr>
<th>Dept</th>
<th>Course</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Course Adding:**

**OR Select a student course:**

CMP_SC 3530

(3 Hours) A

UNIX OPERATION SYSTEM

200526

COMMUN 2100

(3 Hours) A

MEDIA COMMUN IN SOCIETY

CMP_SC 4320

(3 Hours) A+

---

There are two ways to add a course into a subrequirement via exception mode:
1) Type the subject code in the **Dept** field and the course number in the **Course** field, and then click the add icon 🔄 next to the Course field. You should use this method only when the student is yet to take the course.

2) Move courses from the list of courses that the student has already taken (**Select a student course**) into the **Course Adding** box on the right by clicking 🔄 that appears next to each listed course.

You can add one or more courses per exception.

You can undo a course addition by clicking the **Delete** icon ❌.

After you add the course(s), click the **Next** button or the **Verify & Save** tab.

The add course exception button may not be available in exception mode for some subrequirements, specifically when the requirement or subrequirement is met, or the list of courses is hidden by design. In such cases, you must add the Insert (I) exception via the **Exceptions** screen, by clicking the advanced exceptions icon 🔌.

The **Exceptions** screen for the Insert (I) exception lists a number of additional fields (**Accept/Reject Condition Codes** and **Assign Condition Codes**).
<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Academic Unit (select to restrict exception to this unit only)</td>
<td></td>
</tr>
<tr>
<td>Program Code (select to restrict exception to this program only)</td>
<td></td>
</tr>
<tr>
<td>Requirement Name</td>
<td></td>
</tr>
<tr>
<td>Subrequirement Pseudo-Course Name</td>
<td></td>
</tr>
<tr>
<td>Accept Condition Code 1</td>
<td></td>
</tr>
<tr>
<td>Accept Condition Code 2</td>
<td></td>
</tr>
<tr>
<td>Reject Condition Code 1</td>
<td></td>
</tr>
<tr>
<td>Reject Condition Code 2</td>
<td></td>
</tr>
<tr>
<td>Assign Condition Code</td>
<td></td>
</tr>
<tr>
<td>Note (appears in subrequirement)</td>
<td></td>
</tr>
<tr>
<td>Memo (appears in audit footer)</td>
<td></td>
</tr>
<tr>
<td>Authorized by</td>
<td></td>
</tr>
<tr>
<td>Date</td>
<td></td>
</tr>
</tbody>
</table>
You should not set/change these values via an Insert (I) exception. Use a Requirement Modification (RM) exception instead.

The D exception removes a course from a subrequirement’s SELECT FROM or NOT FROM line.

To remove a course from a subrequirement, move the course from the Select course(s) you want to remove list into the Course Removing box, by clicking the remove icon . The course list includes all courses in the SELECT FROM or NOT FROM line, which are not currently meeting the subrequirement. If the course is already meeting the subrequirement, it will not appear on the list.
You can remove one or more courses per exception.

You can undo a course removal by clicking the **Delete** icon.

After you remove the course(s), click the **Next** button or the **Verify & Save** tab.

The **Exceptions** screen for the Delete (D) exception does not include any field not available/prepopulated via exception mode. However, the remove course exception button may not be available in exception mode for some subrequirements, specifically when the requirement or subrequirement is met, or the list of courses is hidden by design. In such cases, you must add the Delete (D) exception via the **Exceptions** screen, by clicking on the advanced exceptions icon. You must also use the **Exceptions** screen if the course is already meeting the subrequirement (as it will not appear on the list of removable courses).

**RM — Requirement Modification**

The **RM** exception alters a requirement or subrequirement.

![Requirement Modification Exception](image)

**Requirement**

*Requirement*

Writing Intensive (6 credits, 2 courses)

(grades of C- or better are required)

1. **Requirement Modification**

2. **Verify & Save**

**Required Sub-requirements**

**Original Value:**

2

Adjust by:

- 0 +

**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 +

[Alter at least one value] [Cancel]
Required Sub-requirements (requirement only): The default number of subrequirements needed to fulfill the requirement displays in gray. Use the ✯ and + icons to increase or decrease the number of needed subrequirements. The value in the Adjust by field will be added or subtracted from the value in the Original Value when you save the exception.

A similar process applies for the Required Hours, Required Course Count, and Required GPA fields.

After you finish adjusting the pertinent values, click the Next button or the Verify & Save tab.

The Exceptions screen for the Requirement Modification (RM) lists a number of additional fields, as follows.
Accept/Reject Condition Code 1/2: Use these fields to set additional course condition codes that should be accepted/rejected by the requirement or subrequirement.

Assign Condition Code: Use this field to assign condition codes to courses used to fulfill this requirement or subrequirement.

Maximum # of Hours (req or subreq level): Use this field to change the maximum number of hours that can apply towards fulfillment of the requirement or subrequirement.

Max Hours Control: This field controls a set of options managed by staff in the Office of the Registrar. You should not set/attempt to change this field.

Max Subreqs (req level)/Max Courses (subreq level): Use this field to change the maximum number of subrequirements that can apply towards satisfaction of a requirement (or courses that can apply towards satisfaction of a subrequirement).

S — Swap Courses

The S exception removes one or more course(s) from, and adds one or more course(s) to, a subrequirement’s SELECT FROM or NOT FROM line. The number of removed and added courses need not be the same.
Its **Swap Out** tab works like a Delete (D) exception and its **Swap In** tab like an Insert (I) exception.

**WR** — Force requirement or subrequirement complete

The **WR** exception forces a current Requirement or Sub-Requirement to completion. While in exception mode, the force complete exception does not require the entry of additional exception details beyond the common fields.
One additional field is available via the Exceptions screen: Waived Hours. Use it to indicate how many hours are being waived (in addition to waiving completion of the requirement). To do so, after you save the exception, edit it and add the number of hours to be waived.
Exceptions Available via the Exceptions Screen Only
You cannot create the following exceptions via the easy-to-use interfaces available while in exception mode in an HTML report.

However, you can (and should) initiate the exception creation process while in exception mode by clicking on the advanced exceptions icon 🔍, selecting an exception type
## Choose an Exception Type

Return to list of exceptions

<table>
<thead>
<tr>
<th>Exception Code</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>CC</td>
<td>Course Substitution (Match New Course Only)</td>
</tr>
<tr>
<td>CH</td>
<td>Reduce Course Hours (Remaining Hours &gt; 0 - Affects GPA)</td>
</tr>
<tr>
<td>CP</td>
<td>Force Course into Subrequirement</td>
</tr>
<tr>
<td>CS</td>
<td>Course Substitution (Match both Old and New Courses)</td>
</tr>
<tr>
<td>CT</td>
<td>Match Title of Topics Course</td>
</tr>
<tr>
<td>CX</td>
<td>Eliminate Hours for Repeated Course (affects GPA)</td>
</tr>
<tr>
<td>CY</td>
<td>Eliminate Hours for Repeated Course (doesn’t affect GPA)</td>
</tr>
<tr>
<td>D</td>
<td>Delete</td>
</tr>
<tr>
<td>DO</td>
<td>Delete All Courses in an AND or OR Set</td>
</tr>
<tr>
<td>I</td>
<td>Insert</td>
</tr>
<tr>
<td>MM</td>
<td>Insert Memo</td>
</tr>
<tr>
<td>RM</td>
<td>Requirement Modification</td>
</tr>
<tr>
<td>S</td>
<td>Swap Courses</td>
</tr>
<tr>
<td>WC</td>
<td>Waive a Specific Course</td>
</tr>
<tr>
<td>WH</td>
<td>Waive Hours</td>
</tr>
<tr>
<td>WR</td>
<td>Waive Requirement</td>
</tr>
</tbody>
</table>

Some exception types are not configured. Show unconfigured exception types.
and then completing the process in the Exceptions screen, which will appear embedded next to the HTML audit report (or below it, if screen resolution is such that it cannot display both screen side-by-side). This causes several fields to auto-populate, thus reducing data entry errors. Which fields auto-populate depend on the exception type. Some examples are: academic unit, program of study, and pseudo course information. The prepopulated fields will display a 🖊 icon next to them. Clicking on the 🖊 doesn’t do anything; it is just informational.

You can also create these exceptions in the Exceptions screen directly. This is not recommended, as fields will not auto-populate.

Exceptions created from exception mode always apply to a specific requirement/subrequirement only.

Exceptions entered via the Exceptions screen are not linked to a specific subrequirement, typically, but apply throughout the audit; of these, the WH exception (Waive Hours) is the only one that applies to a specific requirement/subrequirement.

The Exceptions screen for the Delete (D), Delete All Courses in an AND or OR Set (DO), Insert (I), Swap (S), and Requirement Modification (RM) exceptions includes a common sub-screen to assist with entering course information.

![Add Course](image)

To access this screen, click the Add Course button in the Exceptions screen.

Select a course using the drop-down lists that appear next to the Course field.

For the Swap (S) exception only, select a course using the drop-down lists that appear next to the Replacement Course field. For all other exceptions, leave this field blank.

Leave the Match Control field set to the Default value. Other options are available, but you should consult with degree audits staff in the Office of the Registrar prior to utilization.

You should add a value to the Year Term Range (Values must follow the yearterm/yearterm format, e.g., 201243201327) field if you need to differentiate between multiple takings of the same course. The value is the year and term the student took the course, typically repeated twice to indicate a range of one term; a true range with different start and end values could also be used under certain circumstances. The terms
are encoded as 27=Spring, 35=Summer, and 43=Fall. The example above encodes a range from Fall 2012 to Spring 2013, inclusive.

Click the Add To List button to add the course to the exception's list of courses. When you are done adding courses, click the Return button to return to the Exceptions screen. You must then save your exception and courses by clicking the Save button on the Exceptions screen; else, all the courses you added will be discarded.

**CC — Course Substitution (Match New Course Only)**
The CC exception can achieve two things:

1) Change the identity of a course (it makes it into a new course). The new course will match SELECT FROM and NOT FROM lines that include the new course. If the student took the new course as well, it will be a duplicate of the old course (as the old course no longer exists but it is now an instance of the new course). Similarly, the old course will no longer match SELECT FROM and NOT FROM lines that include the old course.

Select a course using the drop-down lists that appear next to the Course Taken by Student field. If the student took the course more than once, specify which instance of the course you’d like to change, by selecting a year and term value in the Course Taken Year/Term field. It the student took the course multiple times in a term, then you may need to create multiple CC exceptions; contact degreeaudit@missouri.edu for assistance.
Select the substituting course by using the drop-down lists that appear next to the **Substituting Course** field.

2) Add or remove condition codes to or from a course. In this case, the course remains the same, but some of its attributes (condition codes) change.

<table>
<thead>
<tr>
<th>Set Condition Code 1</th>
</tr>
</thead>
<tbody>
<tr>
<td>Set Condition Code 2</td>
</tr>
<tr>
<td>Remove Condition Code 1</td>
</tr>
<tr>
<td>Remove Condition Code 2</td>
</tr>
</tbody>
</table>

Select a course using the drop-down lists that appear next to the **Course Taken by Student** field.

If the student took the course more than once, specify which instance of the course you’d like to change, by setting a year and term value in the **Course Taken Year/Term** field. If the student took the course multiple times in a term, then you may need to create multiple CC exceptions; contact degreeaudit@missouri.edu for assistance.

Specify which condition code(s) will be added or removed by selecting a value for the **Set Condition Code** or **Remove Condition Code** fields using the drop-down list of values provided. If you are unsure what the values on the list mean/do, contact degreeaudit@missouri.edu for assistance.

Complete the common fields and then click the **Save** button to save the exception.
The CH exception reduces a course’s credits to the desired value. GPA calculations take into consideration the reduced value.

Select a course using the drop-down lists that appear next to the **Course Taken by Student** field.

If the student took the course more than once, specify which instance of the course you’d like to change, by setting a year and term value in the **Course Taken Year/Term** field. It the student took the course multiple
times in a term, then you may need to create multiple CH exceptions; contact degreeaudit@missouri.edu for assistance.

Enter the new number of credits in the **Set Course Hours to** field.

Specify which condition code(s) will be added or removed by selecting a value for the **Set Condition Code** or **Remove Condition Code** fields using the drop-down list of values provided. If you are unsure what the values on the list mean/do, contact degreeaudit@missouri.edu for assistance.

Complete the common fields and then click the **Save** button to save the exception.
The CS exception allows the course to match SELECT FROM and NOT FROM lines both as itself and as a second course.
Select a course using the drop-down lists that appear next to the **Course Taken by Student** field.

If the student took the course more than once, specify which instance of the course you’d like to change, by setting a year and term value in the **Course Taken Year/Term** field. If the student took the course multiple times in a term, then you may need to create multiple CS exceptions; contact degreeaudit@missouri.edu for assistance.

By default the second course inherits the first course’s credits, flags, and condition codes; the second course keeps the course number and title.

If you wish to decrease the number of credits for the second course, enter the new number of credits in the **Set Course Hours to** field. GPA calculations take into consideration the reduced value.

To modify the second course’s condition code(s) select the appropriate values in the **Set Condition Code** or **Remove Condition Code** fields using the drop-down list of values provided. If you are unsure what the values on the list mean/do, contact degreeaudit@missouri.edu for assistance.

Complete the common fields and then click the **Save** button to save the exception.
CT — Match Title of Topics Course

The CT exception forces a course into a subrequirement if the course’s title matches any of the titles in the SELECT FROM or NOT FROM lines.

Add Match Title of Topics Course

- **Academic Unit**: Select to restrict exception to this unit only
- **Program Code** (select to restrict exception to this program only): German (BA) - 27400002 - Arts
- **Course Taken by Student**: GERMAN 2001
- **Course Taken Year/Term**: 2001 - UNDGRD TPC
- **Course Topic Title**: Der Spiegel
- **Insert into this Subrequirement (enter pseudo)**
- **Set Condition Code 1**
- **Set Condition Code 2**
- **Remove Condition Code 1**
- **Remove Condition Code 2**
- **Memo**: Appears in audit footer
- **Authorized by**: Helmut Kohl
- **Date**: 11/30/2016

[Buttons: Save & Run Audit, Save & Add Exception, Cancel]
If the requirement/subrequirement is accepting/rejecting courses based on specific condition codes, such constraints will be ignored. Do not use the force course exception if you want the requirement/subrequirement to accept/reject the course based on condition codes. If you want condition codes to be respected, you should use an Insert exception instead, adding the course title to the Note field of the Insert exception.

Select a course using the drop-down lists that appear next to the Course Taken by Student field.

If the student took the course more than once, specify which instance of the course you’d like to use, by setting a year and term value in the Course Taken Year/Term field. If the student took the course multiple times in a term, then you may need to create multiple CT exceptions; contact degreeaudit@missouri.edu for assistance.

Enter the exact course title, as it appears in the audit report, into the Course Topic Title. The field accepts the first 27 characters of the title only.

Enter the subrequirement’s name (pseudo code) in the Insert into this Subrequirement (enter pseudo) field.

Specify which condition code(s) will be added or removed by selecting a value for the Set Condition Code or Remove Condition Code fields using the drop-down list of values provided. If you are unsure what the values on the list mean/do, contact degreeaudit@missouri.edu for assistance.

Complete the common fields and then click the Save button to save the exception.
**CX — Eliminate Hours for Repeated Course (affects GPA)**

The CX exception will reduce the credit hours for the course to zero (0). GPA calculations take into consideration the reduced value, i.e., the course’s credits/grade will have no impact on GPA calculations, thus changing the GPA.

![Add Eliminate Hours for Repeated Course (doesn't affect GPA)](image)

Select a course using the drop-down lists that appear next to the *Course Taken by Student* field.

If the student took the course more than once, specify which instance of the course you’d like to change, by setting a year and term value in the *Course Taken Year/Term* field. It the student took the course multiple times in a term, then you may need to create multiple CY exceptions; contact degreeaudit@missouri.edu for assistance.

Complete the common fields and then click the **Save** button to save the exception.

**CY — Eliminate Hours for Repeated Course (doesn't affect GPA)**

The CY exception is like the CX exception in all regards, except that the course’s original credits and grades continue to be included in GPA calculations.
**DO — Delete all courses in an AND or OR Set**

The **DO** exception removes all courses in an **AND** or **OR** set from the **SELECT FROM** or **NOT FROM** lines. Only one of the set’s courses needs to be added to the exception.

Provided that you accessed the **DO** exception via the advanced exceptions icon ⚡, all fields will prepopulate, except the common fields. You do need to add a course from the set via the **Add Course** button though (see section *Exceptions Available via the Exceptions Screen Only* above for details on how to add a course).
DR — Insert Program of Study
The DR exception allows insertion of an area of study/concentration/track ("tracks") to a degree audit.

**Add Insert Program of Study**

- **Academic Unit (select to restrict exception to this unit only)**
- **Program Code (select to restrict exception to this program only)**: Chemistry (BS) - TEST - P010!
- **Program of Study Type**: $TRACK
- **Program of Study**: Chemistry: Medicinal Chemistry
- **Replacement Type**: D
- **Year/Term**: 
- **Memo**: 
- **Authorized by**: Ruth Badmington
- **Date**: 12/23/2016

Select the **Program Code** for the degree to which you wish to add a track.
Keep the default value of $TRACK in the **Program of Study Type** field.

Select the track via the **Program of Study** LOV. Not all degrees offer such options; also, newly added options may not yet be encoded; if the LOV for the **Program of Study** field is empty, and you believe there should be options to select from, please contact degreeaudit@missouri.edu for assistance.

Keep the default value of D in the **Replacement Type** field.

Leave the **Year/Term** field blank, unless you wish to use a version of the track with a catalog year other than the degree’s.

Complete the common fields and then click the **Save** button to save the exception.
The MM exception adds a memo to the bottom of the audit.

Enter a comment in the Memo field.

Complete the other common fields and then click the Save button to save the exception.
Select the course that is to be considered as satisfactorily completed using the drop-down lists that appear next to the Course field. The WC exception increases course count by 1, but doesn’t affect credit earned nor GPA.

Complete the common fields and then click the Save button to save the exception.
The **WH** exception reduces the number of hours needed to meet a requirement or subrequirement.

Enter the requirement/subrequirement name (pseudo code) in the **Requirement or Subrequirement Name** field to specify which requirement/subrequirement will be affected.

Enter the number of hours to be waived in the **Hours Waived** field.

Complete the common fields and then click the **Save** button to save the exception.
Appendix II: Glossary

2-column PDF: Custom degree audit report in the traditional 2-column text format. You cannot request a degree audit report in this format, but you can view existing text (batch only), HTML, and single-column PDF audit reports in 2-column PDF format.

UM Batch: Custom application to run degree audits for multiple students via a single request.

Condition Code: Code(s) associate with a student’s coursework that denote certain attributes. e.g., condition code “C" means that the course has a grade of C- or better, and “;" means the course has a grade of exactly C-.

Degree Audit: Process of matching a student’s coursework to the requirements for completion of a program of study.

Degree Audit Report: Outcome of a degree audit performed using myDegreePlanner. Can be in text (batch only), HTML, or PDF format.

HTML Audit: Default format for degree audit reports. This format allows for interactive exception entry (assuming you have access to creating exceptions).

PDF Audit (single column): Alternate format for degree audit reports. It consists of a single-column PDF document. Do not confuse with the 2-column PDF report (see above).

Program of Study: A formally declared career objective as reflected in the student’s record in myZou. Can be a degree (e.g., B.A. in History), minor (e.g., Aerospace), emphasis (e.g., Marketing), or certificate (e.g., Multicultural Studies).

Pseudo Code (requirement): Internal name/tag for a requirement. Typically preceded by a $ symbol. e.g., for the Business Area requirement of various Business degree audits, the requirement pseudo is $BUSAREA.

Pseudo Code (subrequirement): Name/tag for courses associated with a subrequirement’s SELECT FROM and NOT FROM lists. Typically, there are two pseudo codes per subrequirement: one tagging courses in the SELECT FROM list and one for courses in the NOT FROM list. They include the requirement pseudo and the subrequirement number, with an R suffix added to the NOT FROM list pseudos. e.g., for the Business Area requirement of various Business degree audits, the requirement pseudo being $BUSAREA, the pseudos for its second subrequirement would be BUSAREA2 and BUSAREA2R, respectively.

uAchieve*: CollegeSource’s name for the degree audit portion of myDegreePlanner. (CollegeSource is the software vendor.)
Appendix III: Internet Explorer Backward Compatibility

myDegreePlanner runs in versions 9 and letter of Internet Explorer. If you have configured one of the supported versions to emulate older versions for the missouri.edu web site, myDegreePlanner will not run correctly in Internet Explorer.

You will need to remove the website from the Compatibility View list:

![Compatibility View Settings](image)

Add this website:

Add

Websites you’ve added to Compatibility View:

- missouri.edu

- Display intranet sites in Compatibility View
- Use Microsoft compatibility lists

Learn more by reading the [Internet Explorer privacy statement](#)

Close