Home Page (overview layout)

A. Tabs-Home: Default Page-Current Audit: Displays the student’s audit

B. Search Bar: Search for students by using First, Last name and/or TC ID
   - Student Focus: Will display all students or only students that have been assigned to you (as the advisor)

C. Notifications: Will display alerts for any action taken on the audit that needs to be reviewed

D. Communicator is the tool in which an advisor is able to store academic notes relating to the student’s academic progress. It is used as an advisory tool, much like the note action when making an exception. NOTE: Depending on the role in advisor will depend whether or not the user has access to the communicator tool.
Creating an Audit

- Using the drop-down menu will display the Student Focus and the Search Bar
- Enter the student’s information (name or TC ID) and click search or find the student under your “focused” list
- Click on the student name to bring up the student’s academic goals page.
Creating an Audit

- Audit History: Displays previously run audits along with the name of the person who ran it
- Create Audit: Runs an audit on the currently highlighted Academic Goal
Note: The first time a user runs an audit, a tour will highlight the features of the degree audit.
Current Audit Overview

A. Actions

B. General Degree Information

C. Audit

Note: Most used action will be Exceptions. Once an exception is made, you may click Rerun to see how it is applied.
Current Audit Overview: Audit Actions

- Click on a requirement. The exceptions tab for that requirement will pop up.

- **Move Course**: only allows courses to be moved to requirements they can legitimately satisfy. If a course does not meet all the parameters of a particular requirement, it cannot be moved under that specific requirement.

- **Exception**: allows the user to force satisfy requirements and map courses to any specific requirement area. Making exceptions disregards parameters that have been set by the requirement. Managing exceptions allows the user to edit/delete exceptions.
How to Move Courses

- Click on the Move Courses Tab to reveal the Move courses panel.
- Click the down arrow to reveal course options. You may also see a list of compatible courses below the dropdown menu.

NOTE: Courses that can be moved will appear in a drop down list. If a course does not appear in the list, it cannot be moved to satisfy that requirement.
How to Move Courses (cont)

- Click on the course you would like to move to the requirement. This will collapse the dropdown menu and only display the selected course. Click on Move Course to complete the move. This will rerun the audit to reflect your move.

- To cancel a move, just click on the x in the top right next to the tour button.

- Your moved course will look as follows with an anchor:
Creating Exceptions

Clicking on the down arrow under the Exception tab will reveal 3 options:

- **Force Map**: This exception forces a specific course to be mapped to the target course list. (used to map courses)

- **Force Satisfy**: This exception forces a specific requirement or parameter to be considered satisfied, even when this would not normally be the case. (used to satisfy projects, comprehensive exams, etc.)

- **Note**: This exception creates a note for all users to see. Purely used as an advisory tool.
Creating Exceptions (Force Map)

NOTE: Not all options will appear for users. NOTE: Ignore Obstacles must be selected in order to force map a course to the requirement.
In the comment section, include the reason for the exception. For example: C&T 1234 replaced course requirement HUDM 1234 or Advisor approved 12/13/12.

Click Finish.

The exception will be listed and by whoever made it. Comments will be listed on the right.
Force Satisfy: This exception forces a specific requirement or parameter to be considered satisfied, even when it would not normally be the case. This action also satisfies a requirement without using a course. (used to satisfy projects, comprehensive exams, etc.)
Creating Exceptions (Force Satisfy cont)

**Force Satisfy the following...**

- **This Requirement: "Elective Courses"**
- A Parameter of this Requirement: "Elective Courses"
- A Parameter of a Course

**Comment**

- Fill in the **Comment** section with the date the requirement was completed.

**Create Force Satisfy Exception**

- Select the first option: “This Requirement: “Requirement name in quotes”
- Fill in the **Comment** section with the date the requirement was completed.
- Select **Create Force Satisfy Exception** to create the exception. This will rerun the audit to reflect the exception.

**NOTE:** For projects, exams, and other similar requirements, the date or month and year must be included in which the requirement was completed. Semester and year (Fall 2011) will not be accepted. (i.e. Completed Project 6/13/09 or June 2011)
Creating Exceptions (Force Satisfy cont)

- **Force Satisfy** will satisfy the subsection (Elective Courses in this example) and can satisfy any section (Electives in this example) if all subsections have been satisfied.

**NOTE:** This will display Exception information in the same way that Force Map does.
Creating Exceptions (Note)

Type your note in the Comment section. Click on Create Note Exception to create your note.

**NOTE:** Adding a note does not force satisfy or map a course to a requirement. The action adds a note to the requirement.

For example: Student is able to take C&T 1234.
How to Manage Exceptions

- Click on the Exceptions button to reveal all exceptions for the student.
- Click on an exception to highlight its options.

<table>
<thead>
<tr>
<th>Type</th>
<th>By</th>
<th>On</th>
<th>Description</th>
<th>Comment</th>
</tr>
</thead>
<tbody>
<tr>
<td>Force Map</td>
<td></td>
<td>Nov 2, 2018</td>
<td>Force Map *A&amp;HM 5026 - Composing Democratic Mus</td>
<td>Testing</td>
</tr>
<tr>
<td></td>
<td></td>
<td>2:27 pm</td>
<td>Clsrn* to &quot;Elective Courses&quot;.</td>
<td></td>
</tr>
<tr>
<td>Force Satisfy</td>
<td></td>
<td>May 4, 2017</td>
<td>Force Satisfy &quot;Portfolio&quot;.</td>
<td>Portfolio Review and accepted 5.3.17</td>
</tr>
<tr>
<td></td>
<td></td>
<td>8:10 pm</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
You will be able to edit the comment by typing in the comment section and click save.

Your other option will be to delete an exception.

If you click Delete it will ask you to confirm:

- Click Yes to confirm deletion. This will rerun the audit.
Click Save to open up the save/rename dialog box.
Save/Rename

- Type the name if you’d like to name the audit (i.e. May 2018 Graduation) and click save to save your audit.

- Rename the audit (optional) and save the audit. Saved audits will be stored and appear on the previous page (Home tab).

**NOTE:** Saving an audit will save the data/information for the present audit only. Always create a new audit in order to view the most current degree audit.
Clicking on PDF will show the following on the bottom right of your screen:

- It will be blue while it is processing and green once complete.

Click on the green check mark to reveal the PDF Audit button. Click on this button to download your PDF.
Communicator is the tool in which an advisor is able to store academic notes relating to the student’s academic progress. It is used as an advisory tool, much like the note action when making an exception.

**NOTE:** Depending on the role in advisor will depend whether or not the user has access to the communicator tool.
Click on the communicator tab and then select student to get to the desire student communicator window.

Use the Student Focus drop down menu or Search by the student’s name or TC ID (T12345678) to select a student.
A dialog box will open up for that student with a message box. For example: Advised to take C&T 1234 in place of HUDM 1234.

Select the submit button to commit the record.
Communicator (cont.)

Here you will see each message that is viewable to or viewable by you.
You can choose who can view your message by clicking Choose Recipients prior to submitting a message or after the fact by using the arrow next to a message created by you.
Have questions or Concerns?

If you have any questions or concerns regarding the degree audit system, contact us via email at degreeaudit@tc.columbia.edu

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