UM Achieve
Degree Audit Training Manual

Revised (November 2021)
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Accessing UM Achieve

- Log into JUMP using your UMNETID and Password

- Click on Staff Home Tab

- Click on UM Achieve PRODUCTION link
How to Search for a Student

- Click on Students tab at top of page OR Click on the Students Icon

There are two ways to search for a student:
1. Enter Student ID (with 2 leading zeroes) and click the Submit button
   OR
2. Search by the student’s first name, last name, or both. Click the Search button

The following page will populate. Select your student by clicking on arrow button below.
How to request a new audit

- Student’s degree and Catalog Year (catalog term) will display on this page.

**Note:** Any student’s with a catalog year before Fall 2015, can only be run as a What-If Audit (see page 12). A regular audit will result in an error. This is because the programs built into the system start as of Fall 2015 forward.

- To run an audit for the student’s current program, click the *Run Declared Programs* button.
- To run a What-If Audit for a student, see page 12 for more information.
- Degree Audits previously run for a student, will appear in the list of Completed Audit Requests (with most recent at the top of list).
**Understanding a Degree Audit**

**General Student Information**
- Pie Chart demonstrates minimum credit hours required to graduate, including: completed, in progress and unfulfilled courses.

**Expand/Collapse Options**
- Open all sections to view more detail about each requirement.

**Student’s admit term**

**Degree Requirements**
- Required courses for a student’s degree, are typically broken down into requirements varying by degree.
- Requirements can be further broken down into sub-requirements.
- Each sub-requirement must be fulfilled in order to complete the whole requirement.

**Engineering Example**
- Requirement: “Preliminary Courses: Engineering” contains 4 sub-requirements
- Sub-Requirements:
  1) Written Requirement for Engineering
  2) Mathematics Requirement for Engineering
  3) Preliminary Engineering Courses Required
  4) Complementary Electives

**Categories**
- The Categories bar graph shows the status of some of the specific requirements in the audit.

**Courses that will not fulfill the sub-requirement**

**Courses that will fulfill the sub-requirement**

**AT LEAST ONE REQUIREMENT HAS NOT BEEN SATISFIED**

**UM Achieve**
**Advisor Training**
If you have a requirement or sub-requirement that is not complete, there will be information below the requirement/sub-requirement. It will list either the number of hours or number of courses needed to complete the requirement or sub-requirement.

Requirements that have not been completed:

Total Hours/GPA and Residency Requirement
This requirement will vary by degree

If a course is equivalent, it will show in the audit as, “MATCHED AS” the equivalent course.

If you click on the course, it will open a pop-up window with the course title, credit hours and course description.
Excess Courses
Any courses that do not satisfy degree requirements will be in this section of the degree audit.
This section will contain courses that students have taken in excess of their degree as well as:
- Repeats
- VW’s/AW’s
- Failed course work

LEGEND - Course Codes
IP = In-progress courses
TR = Transfer course
VW = Voluntary Withdrawal
PL = Planned courses
Through S 06 = Courses completed prior to 2006
Viewing an existing audit

- To view a degree audit that was previously run, click on the **Audits** link at the top of the page and select **Manage**
- This will take you to the Completed Audit Requests page for the student you have searched for (if it is the first time you are running an audit for a student, there will be previous audits on this page)
- Audits that are older than 14 days are automatically deleted

- If you wish to request a new degree audit, Click the **Start Over** button or **Request New** in the Audits tab
Other Information on the audit

There are three tabs that can be found on the audit itself. These are the Audit Results, Course History and Applied Exceptions tabs. You can find an explanation of each below.

Audit Results

The Audit Results Page displays a student’s audit results.

Course History

The Course History Tab includes information such as completed, in-progress and transfer courses as well as term GPA. Course History can be sorted or filtered by grade and/or by term.

- To sort the table, click on the header for the column by which you would like to sort.
  Example: Click on the Course header, the table will be sorted by course A-Z
- To filter the table for a grade or term, use the drop down list in the “Filter by” section and click on the arrow.
**Applied Exceptions**

This section of the audit would show any exceptions that have been applied to a student’s audit.

*Note – Only applicable to Faculty Academic Advisors that complete overrides/exceptions on degree programs.*

*Note – Please see the Exceptions manual for more detailed information about adding exceptions. The manual can be found in Sharepoint under UM Achieve Support.*

<table>
<thead>
<tr>
<th>Code</th>
<th>Audit Note</th>
<th>Pseudo Name</th>
<th>Course</th>
<th>Req Course</th>
<th>Req Name</th>
<th>Memo</th>
</tr>
</thead>
<tbody>
<tr>
<td>CS</td>
<td>Sub MATH1XXX for MATH1510</td>
<td>MATH1XXX</td>
<td>MATH1510</td>
<td></td>
<td></td>
<td>Allow for MATH 1XXX to substitute for MATH 1510</td>
</tr>
</tbody>
</table>

**What-If Degree Audit**

A What-If Audit allows a student to compare their academic record/progress to any program they may indicate, without having to change their current program.

Note: This is useful for students who are considering changing their major, but do not know how their record might apply to the requirements of the new program.

In the example below, an advisor is meeting with a student in the Civil Engineering program, who would like to know how their course history would apply to the Electrical Engineering program, if they were to change programs.

- Go to main homepage
- Enter Student ID or search for your student by name

✓ Click on Run a What-If Audit link
✓ From the Degree drop down menu, select desired program for What If Scenario
✓ Select applicable Catalog Year
✓ If necessary, select appropriate minor or concentration
✓ Click on Run What-If Audit button

- Audit will run
• Advisor can now see what the student would need to if they were switching to Civil Engineering from Electrical
Logging out of UM Achieve

It is important to log out of UM Achieve when you are finished running audits.

1. Logging out of UM Achieve:
   - In Self Service, click on the small wheel in the upper right hand corner
   - Click on Log Out

2. Logging out of JUMP:
   - Click on Sign Out in the upper right hand corner of JUMP
Accessing the Audit Testing Environment

You will be using UM Achieve UAT to test audits that have not been released to students. To get to the environment, please follow the steps below.

- Use the following URL to access JUMP UAT:
- Log into JUMP UAT using your UMNET ID and your UAT password.

If you do not remember your password for JUMP UAT please contact

IST Help & Solutions Centre
support@umanitoba.ca
204-474-8600
123 Fletcher argue

You MUST indicate you are requesting a password reset for JUMP UAT or you run the risk of resetting your production password

- Click on the UM Achieve tab

- Click on the UM ACHIEVE UAT link
In this environment, you do not need to delete your audits and you are now able to test exceptions.

Please remember the UAT environment uses old student record data. Please do not expect to see the same student data (courses, grades, registration, etc.) in UAT as you would see in the PRODUCTION environment.

**Important Notes to Remember**

- UM Achieve is integrated with Aurora Banner. The system reads Banner and populates student information into the audits.

**Running Declared Programs Audits**

- When an audit is run for the student’s declared program, UM Achieve will look at Banner and pick up any courses that are check marked/applied to the student’s SHADEGR record. Once this is identified, UM Achieve will populate those courses into the degree requirements in the audit. Any courses that are NOT check marked/applied to the student’s SHADEGR record, will fall into excess.

**Running What-If Audits**

- When an audit is run for a student in a What-If scenario, UM Achieve will look at Banner and pick ALL courses in a student’s history regardless of whether or not it is check marked/applied to the student’s SHADEGR record.

**Legacy Courses**

- These courses will flow into excess and will require a Faculty Academic Advisor for an exception.
  
  - Example 1: 017.120 can be used to fulfill a psychology major requirement of PSYC 1200. Please send these students to their home faculty for assistance.

**Questions/Assistance**

Please contact the UM Achieve Degree Audit Team by e-mail at: um.achieve@umanitoba.ca