








UNIVERSITY  
OF MANITOBA

Registrar's Office

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UM Achieve  
Exception Protocol

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## Introduction

Course exceptions are used when an audit needs to be adjusted. This guide will walk through each exception and how to do them.

### Important notes









- Use the comment/memo field to include the exception being performed.
- Always run a new audit to see exceptions you've applied.
- When typing in an audit note, do not use '&'.
- Exceptions should not be applied to What-If's unless it is the Science General audit.
- Exceptions are applied only to the **degree program** where the exceptions are added.
- If a course is not going where it should, contact the UM Achieve team for assistance. Do not use an exception to move it.
- Do not use exceptions to move around courses. The audit is dynamic and will adjust on it's own until all sections are completed in green.






## Accessing Exceptions

All exceptions are accessed by clicking on the 'Exception Mode' button within an audit.



## Overview of Each Exception

Name	Use(s):	Icon(s)	Code
Course Substitution	One course replaces another specific course with equal credit hours A 'Select From' list is required.		CS
Force Requirement Complete	Completes a 'check' requirement that would be finished (course in excess) Completes a requirement that does not require credit hours (eg. Military Residency, CPR,)		EE
Sub-requirement modification Exception	Adjust required hours for spanned courses over contributing to a requirement		RM
Insert Course	Adds a course as an extra option to a <u>Select From</u> list of non-required courses		RM
Insert Course + Remove Course + Sub-requirement modification	Used to substitute courses that do not match credit hours	  	RM+ RD+ RM
Force Course ( <b>only designated users can use with RO help</b> )	Adding duplicate transfer courses (eg two 201890 PSYC 1200 courses) Adding a rejected course, or a course on a 'Not From' list to a requirement Adding a course to a completed sub-requirement		C9

Do not use the following:	
Orange Force Course (unless by designated user)	
Orange Force Sub-Requirement Complete	
Black Edit Requirement	
Red Add course to Not From	
Red Remove course to Not From	

## Exceptions processed in the Registrar's Office

Submit an [exception form](#) to [um.achieve@umanitoba.ca](mailto:um.achieve@umanitoba.ca) for the following exceptions:

### 1. Allowing two mutually exclusive courses to maintain credit for program entrance

**Example:** Student received permission to take the mutually exclusive course BIOL 1000 and maintain credit for BIOL 1020.

**Note:** A Records Advisor will make a correction in Banner. Credit will always be stripped from one of the courses in UM Achieve.

### 2. Duplicate Transfer Courses in the Same Term

**Example:** Student has two transfer credits for PSYC 1200(3) in Fall 2015 and would like to use one in a requirement.

3. **Adjusting Required Hours to graduate with less credit**

**Example:** A 3 credit course that is equivalent to a 4 credit hour course leaving the student 1 credit short from graduation.

4. **Making Exceptions to 'Grouped Lists'**

Grouped lists are courses that students may select from but are categorized into different groups.

Grouped Lists are denoted:

<p>3) Within requirements listed above, students must complete courses from at least 2 religious traditions: Buddhism, Christianity, Hinduism, Islam and Judaism Advisor note: grouped list</p> <p>NEEDS:            6.0 HOURS            2 COURSES</p>
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**Example:** A Major in Religion requires a student to complete courses from at least two religious traditions.

**⚡ Course Substitution (CS): Replace one course with another (equal credit hours)**

If the credit hours are not equal, please see page 7

**Example Scenario:** Advisor needs GEOL 1340 to be recognized as GEOL 2250 in the audit.

Step 1:	In Exception Mode, click on the ⚡ icon	<p>Open All Sections    Close All Sections</p> <p>AT LEAST ONE REQUIREMENT HAS NOT BEEN SATISFIED</p> <p>&gt;</p> <p>For What If Audits: Transfer credit regulations are</p> <p>Description</p> <p>Force Course    Exception Code</p> <p>Course Substitution    C9</p> <p>CS</p>																				
Step 2:	Click on 'Course Substitution'	<p>Force Course    C9</p> <p>Course Substitution    CS</p>																				
Step 3:	<p>Fill in all fields, then click <b>Save</b></p> <ol style="list-style-type: none"> <li>Type in the course taken by the student.</li> <li>Enter the term for the course that was taken by the student (ex 201810 or 200500)</li> <li>Enter the course being replaced. You can use generic subjects like MATH** **</li> <li>Short message to display in the audit.</li> <li>This is required and will not display in the audit</li> </ol> <p>UM Achieve program code, Authorized by, and Date will auto-fill.</p>	<div data-bbox="724 479 1239 1258"> <h3>Add Course Substitution</h3> <p>UM Achieve Program Code: 03C-023</p> <p>Course Taken by Student (eg 017*210, PSYC1200, ENG*2030, FA**1020, * indicates spaces required): GEOL1340 <b>1</b></p> <p>Year/Term (eg 201590, 200500): 201810 <b>2</b></p> <p>Substituted Course (eg 077*120, PSYC1200, FIN*2200, FA**3440, * indicates spaces required): GEOL2250 <b>3</b></p> <p>Message Displayed on Audit (eg "Legacy Course" or "Approved Substitution"): GEOL 1430 subs GEOL 2250 <b>4</b></p> <p>Memo (eg Permitted to use 017120 in lieu of PSYC1200): Approved by Department Head <b>5</b></p> <p>Authorized By (eg A. Moore): umnetid</p> <p>Date (mm/dd/yyyy): 04/23/2021</p> <p>Save &amp; Run Audit    Save &amp; Add Exception    Cancel</p> </div> <div data-bbox="1291 479 1942 925" style="border: 1px solid black; padding: 5px;"> <p>Courses must be typed properly or it will not process. The input is <b>case sensitive</b> and may require <b>spaces</b>. Follow the rules below:</p> <p><b>Legacy Courses must look like:</b>    ###[space]### Example:    052 091</p> <p><b>Current Courses must look like:</b>    AAAA1234 Example:    PSYC1200 Example:    AAA[space]1234 Example:    SOC 1200 Example:    AA[2spaces]1234 Example:    FA 1020</p> </div> <div data-bbox="1291 950 1942 1063" style="border: 1px solid black; padding: 5px;"> <p>Follow the comment standards found at the end of this document</p> </div>																				
Step 4:	When you run a new audit, it will display the course as matched as	<table border="1"> <tr> <td>W 18</td> <td>ENG 2040</td> <td>3.0</td> <td>IP</td> <td>Engineering Communication: Strategies, Practice and Design</td> </tr> <tr> <td>W 18</td> <td>GEOL 1340</td> <td>3.0</td> <td>IP</td> <td>The Dynamic Earth</td> </tr> <tr> <td></td> <td></td> <td></td> <td></td> <td>GEOL1340 subs GEOL2250</td> </tr> <tr> <td></td> <td></td> <td></td> <td></td> <td>&gt;&gt;MATCHED AS: GEOL2250</td> </tr> </table>	W 18	ENG 2040	3.0	IP	Engineering Communication: Strategies, Practice and Design	W 18	GEOL 1340	3.0	IP	The Dynamic Earth					GEOL1340 subs GEOL2250					>>MATCHED AS: GEOL2250
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				>>MATCHED AS: GEOL2250																		

**Force Requirement Complete (EE)**

Use this requirement **only** for the following:

- To complete a 'check' requirement that would normally be complete but course(s) are in excess *Check Requirements are denoted with an italicized title*  
Example: A Faculty of Science student has completed the Major, Minor, and Options courses, but 3 credits for the Mathematics check are in Excess Courses.
- To complete a requirement that **does not require credit hours** or is non-academic (eg: Kinesiology's CPR exit requirement)

**WARNING** If this exception is used on a requirement that needs credit hours, the student will be lead to believe they are eligible to graduate with less credit hours than required.

**Example:** Kinesiology has approved a student's Standard First Aid Certification(CPR) Exit Requirement and would like to check off the requirement in the audit.

Step 1:	In Exception Mode, find the requirement to force complete and click <input checked="" type="checkbox"/> Using <input checked="" type="checkbox"/> will not work properly	<div style="display: flex; justify-content: space-between; align-items: center;"> <div style="text-align: center;"> <span style="color: red;">✖</span> <b>Faculty of Kinesiology and Recreation Management Exit Requirement</b> </div> <div style="text-align: right;"> <input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> </div> </div> <div style="margin-top: 10px;"> <span style="color: red;">✖</span> 1) Current Basic Rescuer and Emergency or Standard First Aid Certification required             <div style="float: right; text-align: right;"> <input type="checkbox"/> <input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> </div> </div>
Step 2:	Fill in the Audit Note and Memo. Click "Save & Run Audit".	<div style="border: 1px solid #ccc; padding: 5px;"> <p style="font-size: small; margin: 0;">Requirement Force Complete Exception</p> <p><b>Requirement</b> Faculty of Kinesiology and Recreation Management Exit Requirement</p> <p style="margin: 5px 0;">1. Verify &amp; Save</p> <p style="font-size: x-small; margin: 0;">This Exception will force the current Requirement to Completion.</p> <p><input checked="" type="checkbox"/> Restrict to this Degree Program.</p> <div style="border: 1px solid red; padding: 2px; margin: 5px 0;"> <p style="font-size: x-small; margin: 0;"><b>Audit Note</b></p> <p style="font-size: x-small; margin: 0;">Req/Sub-req complete</p> <p style="font-size: x-small; margin: 0;">(Maximum characters: 27)</p> </div> <div style="border: 1px solid red; padding: 2px; margin: 5px 0;"> <p style="font-size: x-small; margin: 0;"><b>Memo</b></p> <p style="font-size: x-small; margin: 0;">CPR/ First Aid received on May 2018</p> <p style="font-size: x-small; margin: 0;">(Maximum characters: 255)</p> </div> <div style="display: flex; justify-content: space-between; margin: 5px 0;"> <div style="font-size: x-small;"> <p><b>Authorized by</b></p> <input type="text" value="heck"/> <p style="font-size: x-small;">(Maximum characters: 30)</p> </div> <div style="font-size: x-small;"> <p><b>Date</b></p> <input type="text" value="10/04/2018"/> </div> </div> <div style="display: flex; justify-content: space-between; margin-top: 5px;"> <span style="background-color: orange; color: white; padding: 2px 5px;">Save &amp; Run Audit</span> <span style="background-color: green; color: white; padding: 2px 5px;">Save &amp; Add Exception</span> <span style="border: 1px solid #ccc; padding: 2px 5px;">Cancel</span> </div> </div>
Step 3:	The new audit will show a green check for completion	<div style="display: flex; justify-content: space-between; align-items: center;"> <div style="text-align: center;"> <span style="color: green;">✔</span> <b>Faculty of Kinesiology and Recreation Management Exit Requirement</b> </div> </div>


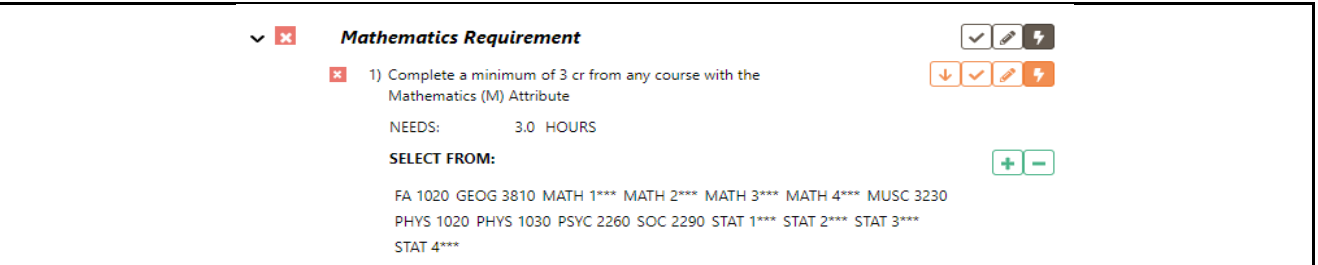
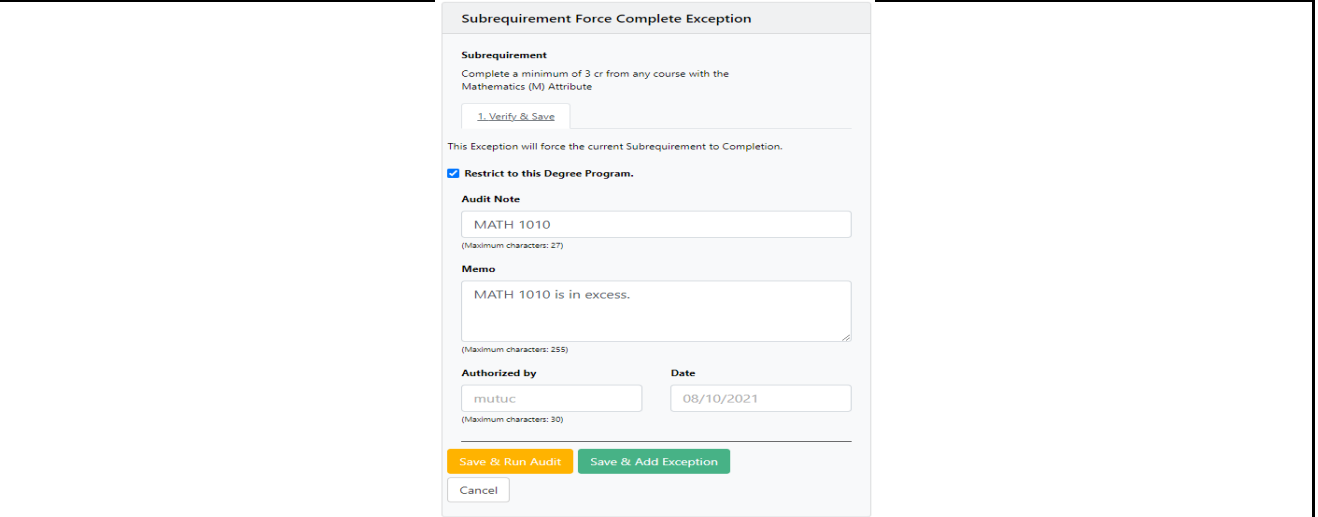
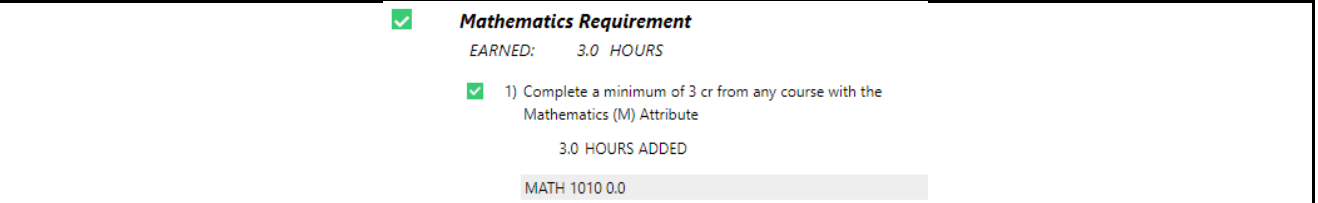
 Force Requirement Complete (EE) for Check Requirements

Use this requirement **only** for the following:

- To complete a 'check' requirement that would normally be complete but course(s) are in excess *Check Requirements are denoted with an italicized title*  
Example: A Faculty of Arts student has completed the Major, Minor, and Options courses, but 3 credits for the Mathematics check are in Excess Courses.
- To complete a requirement that **does not require credit hours** or is non-academic (eg: 5 subject fields in Arts or Environment)

**WARNING** If this exception is used on a requirement that needs credit hours, the student will be lead to believe they are eligible to graduate with less credit hours than required.

**Example:** Student has completed MATH 1010 and is located in Excess Courses.


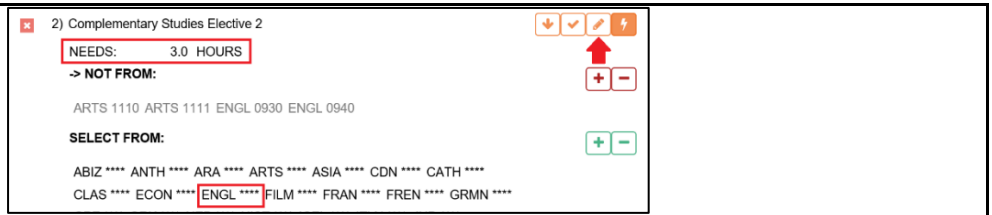

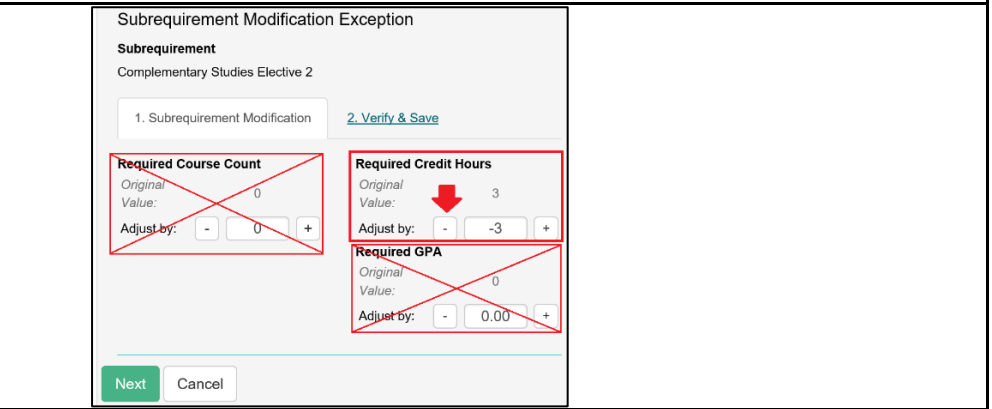
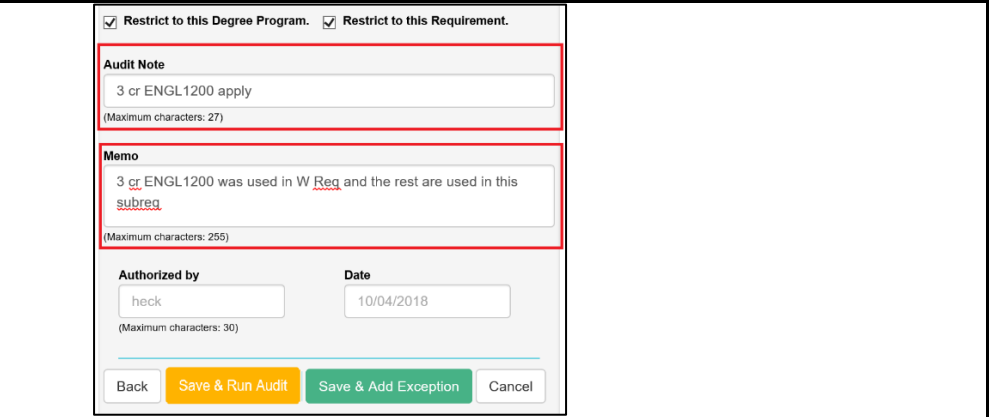
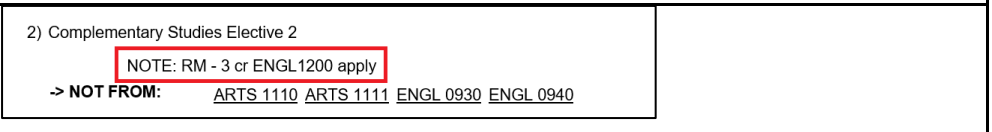
<p>Step 1:</p>	<p>In Exception Mode, find the requirement to force complete and click </p>	
<p>Step 2:</p>	<p>Fill in the Audit Note and Memo. Click "Save &amp; Run Audit".</p>	
<p>Step 3:</p>	<p>The new audit will show a green check for completion</p>	



 **Edit Sub-Requirement (RM): Applying credit hours from a spanned course to another requirement**

Use when the 3 credit hours of a spanned course needs to be added to another requirement.

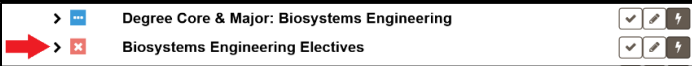
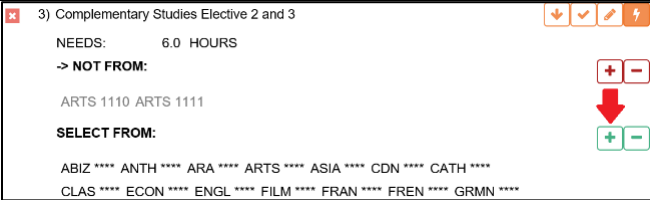

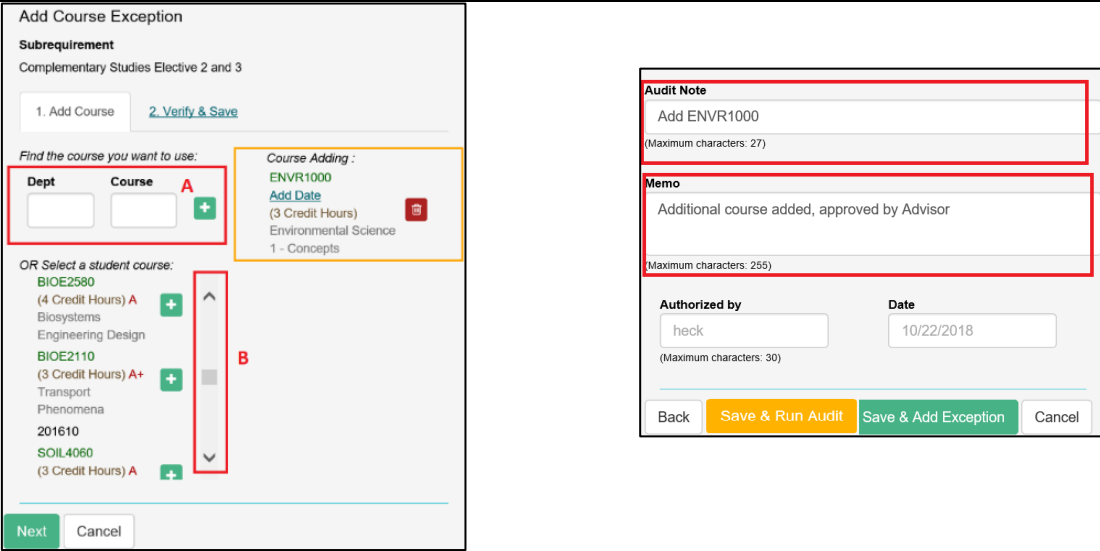
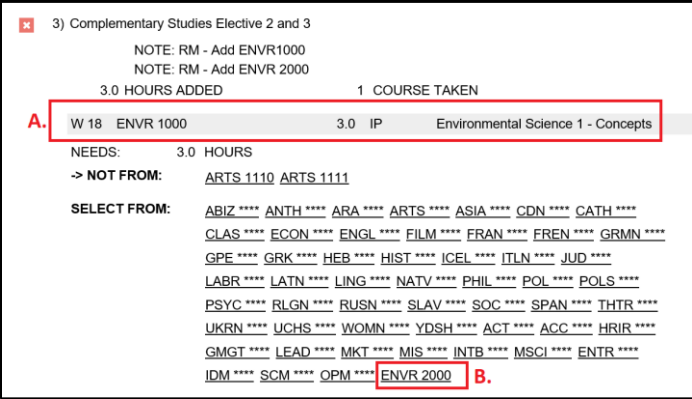
**Example:** An Engineering advisor would like 3 credit hours of ENGL 1200 to contribute to the Complimentary Studies Elective 2

<p>Step 1:</p>	<p>In Exception Mode, find the sub-requirement or requirement you will reduce hours from and click . The student would require 3 credits less in this sub-requirement.</p>		
<p>Step 2:</p>	<p>In the <b>Required Hours</b> section, lessen the credit hours by using  then click next  Do not use the other two sections</p>		
<p>Step 3:</p>	<p>Fill in the Audit Note and Memo.  Click "Save &amp; Run Audit" to see the exception take place.</p>		
<p>Step 4:</p>	<p>The new audit will no longer require 3 credit hours where the second half of the spanned course is applicable. Instead, the audit note will display.</p>		

**+ Insert Course (RM): Adding a course to 'Select From' list**

Adds a course to choose from in a list **in addition** to the courses already listed. You can also add a course a student has not yet registered for.


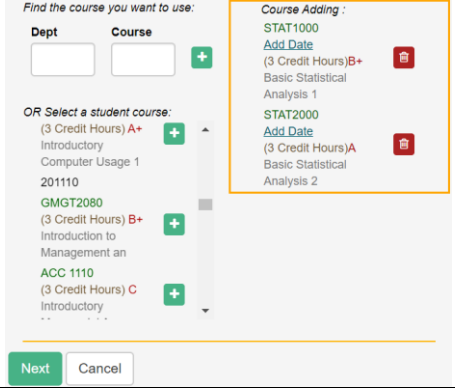




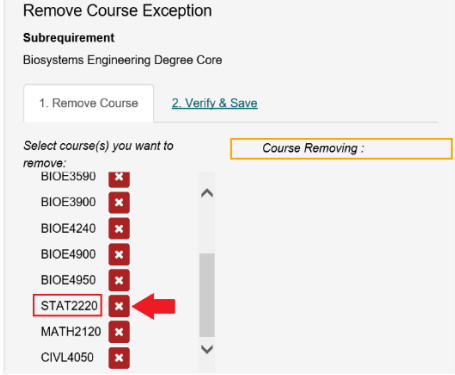

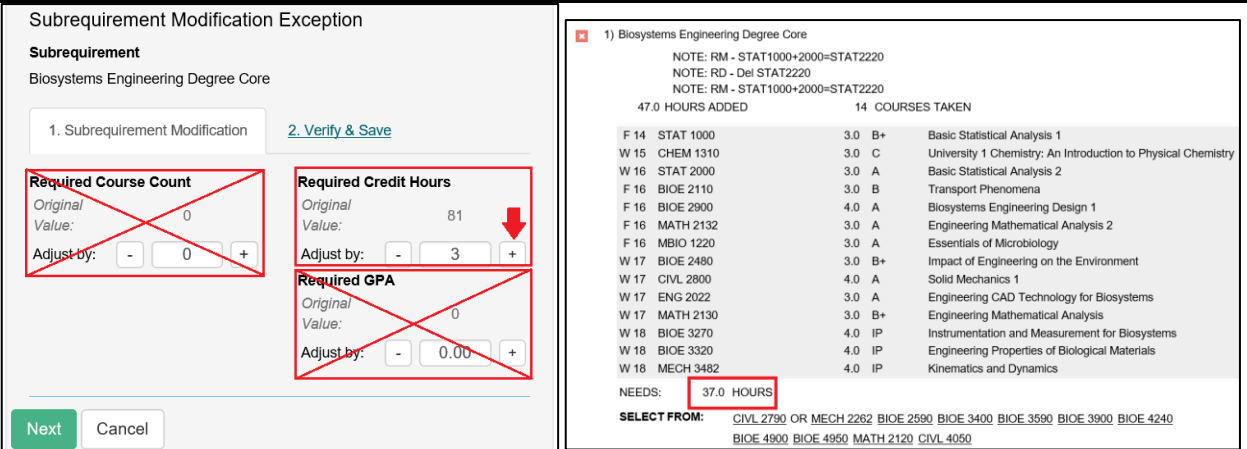
**Note:** A "Select From" list must be showing. If a requirement is complete but a student plans to drop a course, you must add the exception after the student drops the course.

Step 1:	In Exception Mode, expand the requirement you want to adjust.	
Step 2:	Click the <b>+</b> beside the <u>Select From</u>	
Step 3:	<p>Scroll to find the completed course (B) or type the subject code and course number (A) then click the <b>+</b>.</p> <p>If you make an error, click the  to remove the course.</p> <p>Click <b>Next</b> and fill in the Audit Note and Memo.</p> <p>Click <b>Save &amp; Add Exception</b>, or <b>Save &amp; Run Audit</b> to run a new audit</p>	
Step 4:	<p>In the new audit</p> <p>A. If the course was in history or IP, it will automatically come into the requirement</p> <p>B. When inserting a course a student has not yet registered for, the new course number will be listed in <u>"Select From"</u> list.</p>	

Substituting courses whose credit hours are not equal




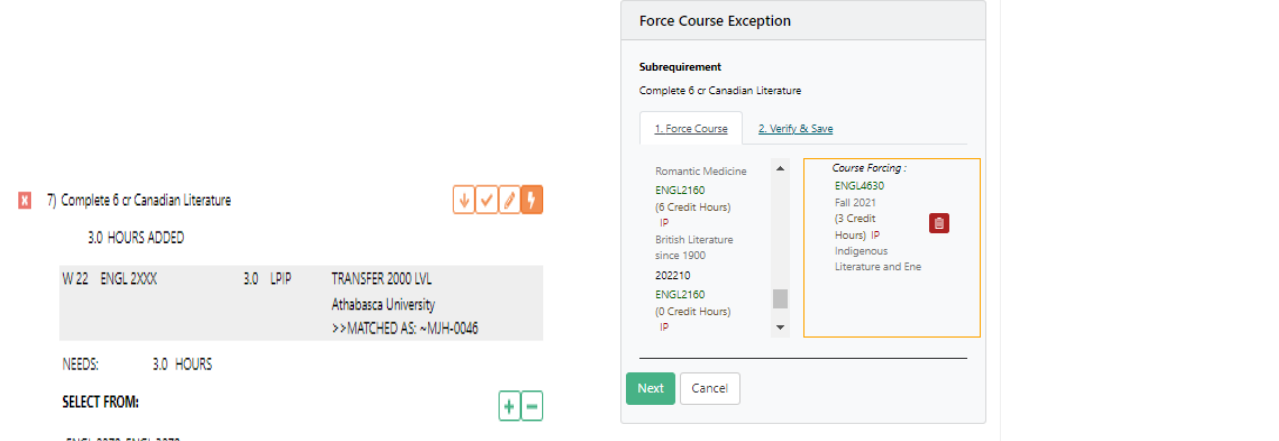

**WARNING:** If a different exception is used it will result in a student graduating without fulfilling all degree requirements.

**Example:** A student needs two courses, STAT 1000(3) & 2000(3) to replace a required STAT 2220(3) course.

<p>Step 1:</p>	<p>Do an Insert Course  exception for the courses (see page 3)</p>																																																																																					
<p>Step 2:</p>	<p>If in the new audit, the old course is still in the Select From list, do a Remove Course  exception. If not, skip this step.</p> <p>To remove a course from a list:</p> <ol style="list-style-type: none"> <li>In Exception Mode, Click  beside <u>Select From</u>.</li> <li>Scroll to find the course and click  then click </li> <li>Fill out the note and memo and save</li> </ol>																																																																																					
<p>Step 3:</p>	<p>Edit the sub-requirement  to add the credit hours the student still requires (See page 2). Typically, this is 3 credit hours.</p> <p>In this example, after adding the STAT 1000 &amp; 2000, the audit indicates the student needs to take 34 credits. The actual amount of credits needed based on the exception for this student's needs to be changed to 37 credits.</p>	 <table border="1" data-bbox="1291 1031 1963 1388"> <thead> <tr> <th colspan="4">1) Biosystems Engineering Degree Core</th> </tr> </thead> <tbody> <tr> <td colspan="4">NOTE: RM - STAT1000+2000=STAT2220</td> </tr> <tr> <td colspan="4">NOTE: RD - Del STAT2220</td> </tr> <tr> <td colspan="4">NOTE: RM - STAT1000+2000=STAT2220</td> </tr> <tr> <td colspan="2">47.0 HOURS ADDED</td> <td colspan="2">14 COURSES TAKEN</td> </tr> <tr> <td>F 14</td> <td>STAT 1000</td> <td>3.0 B+</td> <td>Basic Statistical Analysis 1</td> </tr> <tr> <td>W 15</td> <td>CHEM 1310</td> <td>3.0 C</td> <td>University 1 Chemistry: An Introduction to Physical Chemistry</td> </tr> <tr> <td>W 16</td> <td>STAT 2000</td> <td>3.0 A</td> <td>Basic Statistical Analysis 2</td> </tr> <tr> <td>F 16</td> <td>BIOE 2110</td> <td>3.0 B</td> <td>Transport Phenomena</td> </tr> <tr> <td>F 16</td> <td>BIOE 2900</td> <td>4.0 A</td> <td>Biosystems Engineering Design 1</td> </tr> <tr> <td>F 16</td> <td>MATH 2132</td> <td>3.0 A</td> <td>Engineering Mathematical Analysis 2</td> </tr> <tr> <td>F 16</td> <td>MBIO 1220</td> <td>3.0 A</td> <td>Essentials of Microbiology</td> </tr> <tr> <td>W 17</td> <td>BIOE 2480</td> <td>3.0 B+</td> <td>Impact of Engineering on the Environment</td> </tr> <tr> <td>W 17</td> <td>CIVL 2800</td> <td>4.0 A</td> <td>Solid Mechanics 1</td> </tr> <tr> <td>W 17</td> <td>ENG 2022</td> <td>3.0 A</td> <td>Engineering CAD Technology for Biosystems</td> </tr> <tr> <td>W 17</td> <td>MATH 2130</td> <td>3.0 B+</td> <td>Engineering Mathematical Analysis</td> </tr> <tr> <td>W 18</td> <td>BIOE 3270</td> <td>4.0 IP</td> <td>Instrumentation and Measurement for Biosystems</td> </tr> <tr> <td>W 18</td> <td>BIOE 3320</td> <td>4.0 IP</td> <td>Engineering Properties of Biological Materials</td> </tr> <tr> <td>W 18</td> <td>MECH 3482</td> <td>4.0 IP</td> <td>Kinematics and Dynamics</td> </tr> <tr> <td colspan="2">NEEDS:</td> <td colspan="2">37.0 HOURS</td> </tr> <tr> <td colspan="4"><b>SELECT FROM:</b> CIVL 2790 OR MECH 2262 BIOE 2590 BIOE 3400 BIOE 3590 BIOE 3900 BIOE 4240 BIOE 4900 BIOE 4950 MATH 2120 CIVL 4050</td> </tr> </tbody> </table>	1) Biosystems Engineering Degree Core				NOTE: RM - STAT1000+2000=STAT2220				NOTE: RD - Del STAT2220				NOTE: RM - STAT1000+2000=STAT2220				47.0 HOURS ADDED		14 COURSES TAKEN		F 14	STAT 1000	3.0 B+	Basic Statistical Analysis 1	W 15	CHEM 1310	3.0 C	University 1 Chemistry: An Introduction to Physical Chemistry	W 16	STAT 2000	3.0 A	Basic Statistical Analysis 2	F 16	BIOE 2110	3.0 B	Transport Phenomena	F 16	BIOE 2900	4.0 A	Biosystems Engineering Design 1	F 16	MATH 2132	3.0 A	Engineering Mathematical Analysis 2	F 16	MBIO 1220	3.0 A	Essentials of Microbiology	W 17	BIOE 2480	3.0 B+	Impact of Engineering on the Environment	W 17	CIVL 2800	4.0 A	Solid Mechanics 1	W 17	ENG 2022	3.0 A	Engineering CAD Technology for Biosystems	W 17	MATH 2130	3.0 B+	Engineering Mathematical Analysis	W 18	BIOE 3270	4.0 IP	Instrumentation and Measurement for Biosystems	W 18	BIOE 3320	4.0 IP	Engineering Properties of Biological Materials	W 18	MECH 3482	4.0 IP	Kinematics and Dynamics	NEEDS:		37.0 HOURS		<b>SELECT FROM:</b> CIVL 2790 OR MECH 2262 BIOE 2590 BIOE 3400 BIOE 3590 BIOE 3900 BIOE 4240 BIOE 4900 BIOE 4950 MATH 2120 CIVL 4050			
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Force Course (with duplicate topics courses)

**Example:** A student has two ENGL 4630 courses. ENGL 4630 Indigenous Literature and Energy Humanities should be used in the Canadian Literature sub-requirement rather than ENGL at the 4000 level sub-requirement.

<p>Step 1:</p> <p>Step 2:</p>	<p>Step 1: Do a Force Course exception </p> <p>Choose the correct topics title by clicking on the  button beside the course and click on the  button.</p>	
<p>Step 3:</p> <p>Step 4:</p> <p>Step 5:</p>	<p>Type in the <b>EXACT topics title in the AUDIT NOTE</b> field until the character limit runs out (Ex: Indigenous Literature and Energy Humanities was shortened to Indigenous Literature and E due to character limit)</p> <p>Enter reason for exception in the memo field.</p> <p>Click on  Button</p>	