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Responsive Dashboard: Not Just for Tesla Anymore!

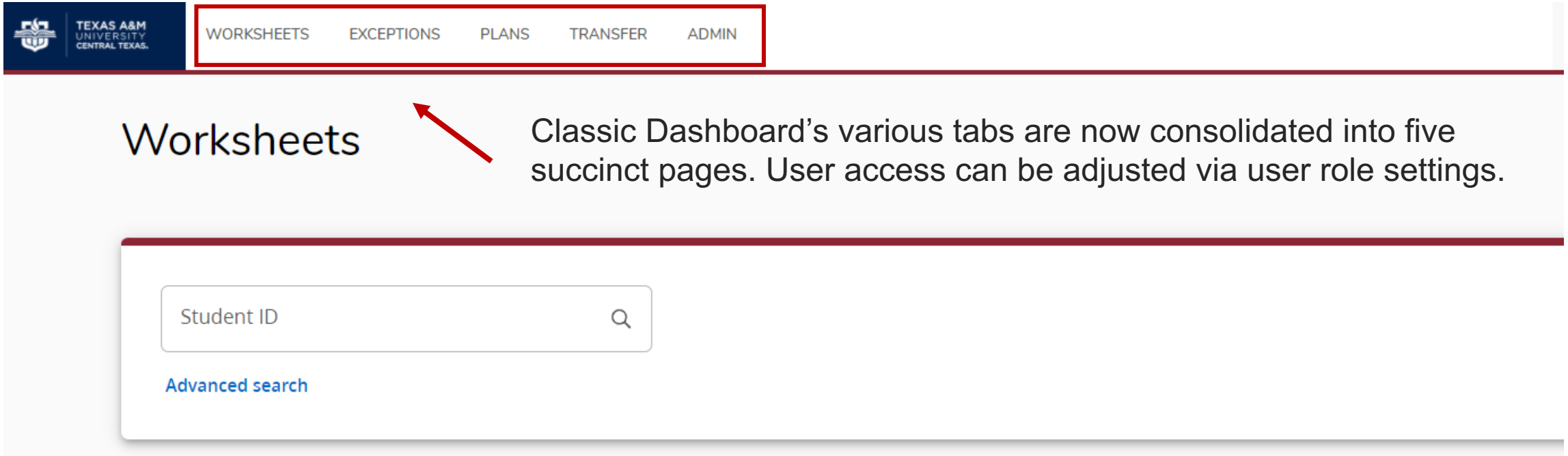


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Agenda:

- Interface Overview
- Customizing Report Formats
- Creating Custom Variables
- SEPs (Student Educational Plans)
- Communication Strategy

Interface Overview



The screenshot displays the top navigation bar of the Texas A&M University Central Texas interface. The navigation menu includes five tabs: WORKSHEETS, EXCEPTIONS, PLANS, TRANSFER, and ADMIN. A red box highlights these tabs, and a red arrow points from the text below to the 'Worksheets' tab. Below the navigation bar, the 'Worksheets' section is visible, featuring a search bar with the placeholder text 'Student ID' and a magnifying glass icon. Below the search bar, there is a link for 'Advanced search'.

Worksheets

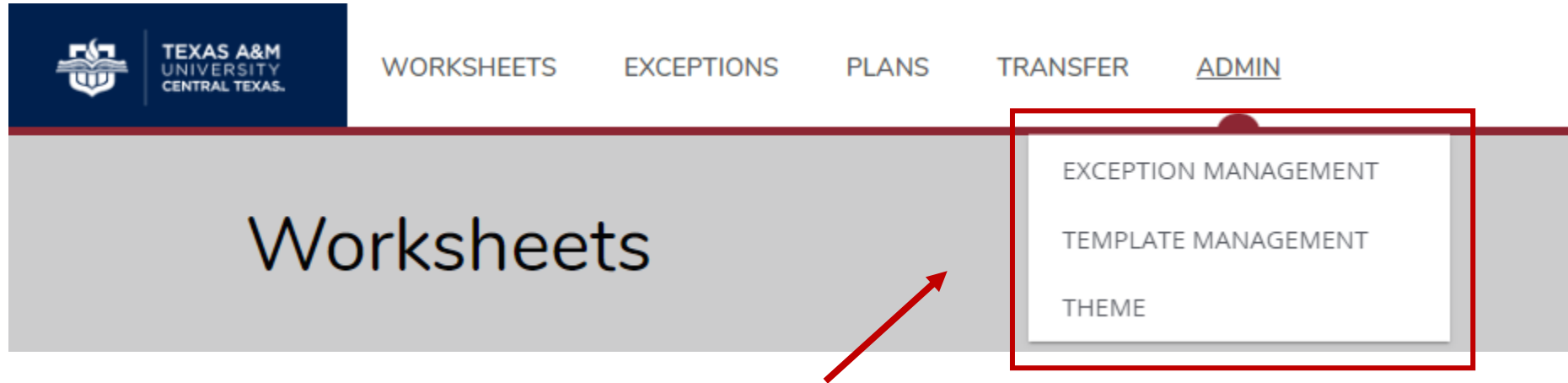
Classic Dashboard's various tabs are now consolidated into five succinct pages. User access can be adjusted via user role settings.

Student ID

[Advanced search](#)



Interface Overview




Note that Exception Management (Petition Management), Template Management (SEPs), and the Theme Editor reside under the “Admin” tab.



Interface Overview




SEPPLAN	SEP - Plans - Planner tab	+	Never		
SEPTEMP	SEP - Templates - Create a plan from a template	+	Never		

User Groups

Filter by group or description  [Add group](#)



Keys can be added directly to individuals or to user groups, which are collections of function-similar keys.

Group ↑	Description	Operator	Expire date		
ADMPWR	Admin Power User	+	Never		
CONTROL	Controller User	+	Never		
PWPLANS	Poweruser PLANS Group	+	Never		



Interface Overview

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WORKSHEETS EXCEPTIONS PLANS TRANSFER ADMIN

Rachael N Woolfork

Theme Editor

Primary color *
#00204e

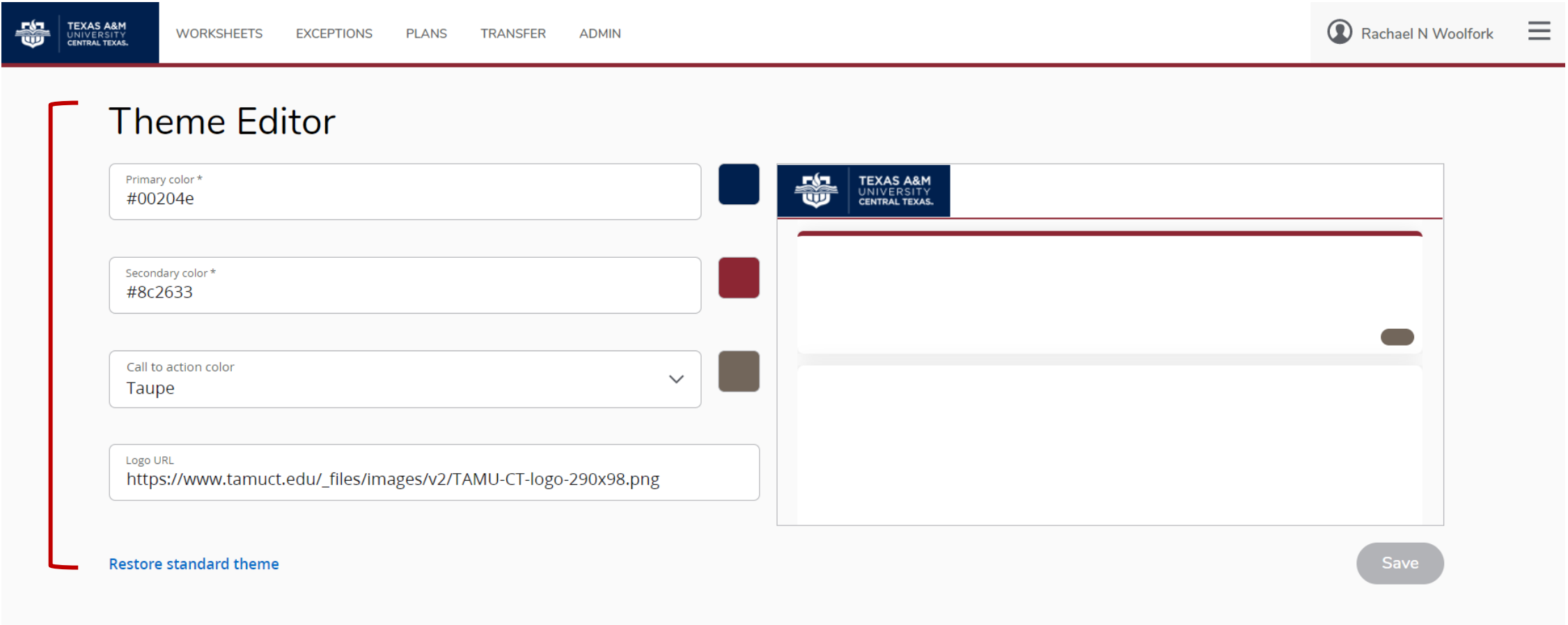
Secondary color *
#8c2633

Call to action color
Taupe

Logo URL
https://www.tamuct.edu/_files/images/v2/TAMU-CT-logo-290x98.png

Restore standard theme

Save

The image shows a 'Theme Editor' interface for a website. On the left, there are four input fields: 'Primary color *' with value '#00204e', 'Secondary color *' with value '#8c2633', 'Call to action color' with value 'Taupe', and 'Logo URL' with a long URL. To the right of these fields are three color swatches: dark blue, dark red, and taupe. Below the fields is a 'Restore standard theme' link. On the right side, there is a preview window showing a header design with the Texas A&M University Central Texas logo and text. A 'Save' button is located at the bottom right of the preview area.

Interface Overview

Worksheets

Data refreshed 1/25/2022 1:23 PM

Student ID
W01016178




Name
Testing, Test

Degree
Bachelor of Business Admin.

[Advanced search](#)

Level Undergraduate **Classification** Freshman **Major** Marketing **Program** BBA - Marketing **College** Business Administration **Overall GPA** 3.346

Holds 6 Drops Remaining (Info Only), Orientation Required, Academic Advising Hold **Catalog Year** Spring 2022

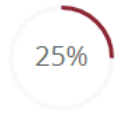
-   
- GPA Calculator
- Class History
- Petitions
- Notes

[Academic](#) [What-If](#) [Financial Aid](#)

[View historic audit](#) 

Format
Student View 

Degree progress

25% 

Overall GPA
3.34

Requirements

In-progress classes Preregistered classes [Process](#)

Select the three dots at the top of the page for additional options.

Note: Student header displays only items for which there is goal data.



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Interface Overview

Academic What-If Financial Aid View historic audit

Format Student View

Degree progress

25% Requirements

Overall GPA 3.34

In-progress classes Preregistered classes Process

Audit date 1/25/2022 2:18 PM

Diagnostics Student data Save audit

Collapse all

Below the student header you will find the ability to run diagnostics, view student data, and save a copy of the student audit.



Interface Overview

Degree in Bachelor of Business Administration

INCOMPLETE

Credits required: 120 Credits applied: 29 Catalog year: 2021-2022 GPA: 3.34

Requirement blocks include the same data but with an updated look.



Texas Common Core- Marketing Majors

INCOMPLETE

Credits required: 42 Credits applied: 20 Catalog year: 2021-2022 GPA: 3.15

Drop down arrows can expand or collapse blocks for easy viewing.

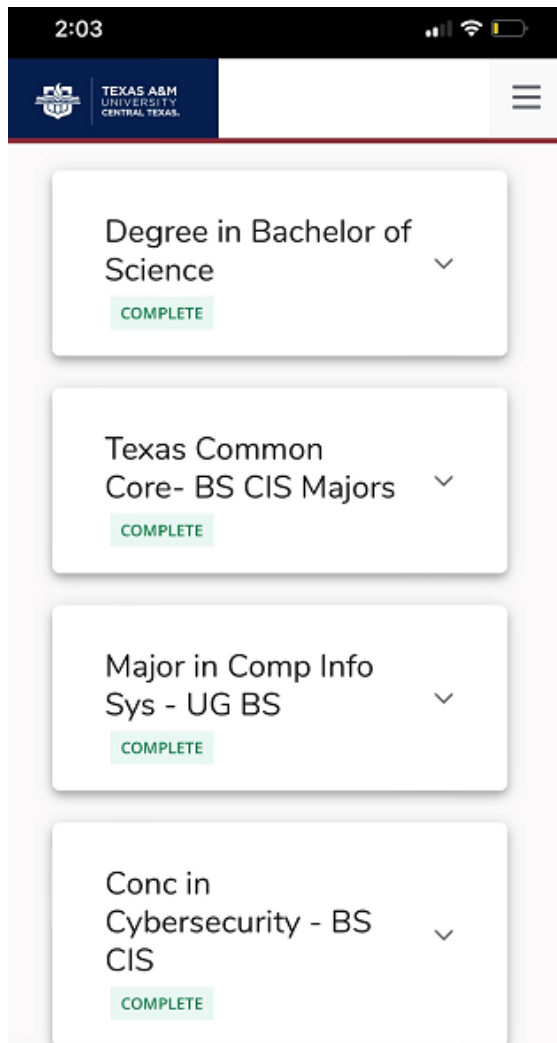


Unmet conditions for this set of requirements:

42 credits are required. You currently have 20, you still need 22 more credits.

	Course	Title	Grade	Credits	Term	Repeated
✓ Communication (010)	ENGL 1301	Composition I	A	3	Fall 2019	
Satisfied by:		ENGL1301 - Composition I - Central Texas College				
	ENGL 1302	Composition II	B	3	Fall 2019	





Interface Overview

Students can now easily view their audit from their phone, tablet, or other device. The Responsive Dashboard will adjust the format accordingly. To view a section in-depth, students and staff can click on the down arrow to expand the selection.



Interface Overview

Controller > Configuration > “dash.”


for all things dashboard related

dash.search.studentId.mask

Add specification

Back to search

Number of characters to mask (ex: "5" for *****6789)

Specification ↑	Value	
default	0	



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Customizing Report Formats

Controller

Users

Groups

Configuration

RPT036 – for all things audit related

Search for configurations



Add new Shepherd setting

You searched for: RPT036

Type	Configuration	
UCX	RPT036 Audit Report Formats	>
SHP	studentPlanner.planner.quickAudit.rpt036ReportType	>



Page 1 of 1



















Per page: 20

Total results: 2



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Customizing Report Formats

TRQ31	Transfer Equivalency Worksheet	DGW_Report.xlsl	Yes	No	No	Yes	  
WEB30	Registrar Report	DGW_Report.xlsl	Yes	Yes	No	Yes	  
WEB31	Student View	DGW_Report.xlsl	Yes	No	No	Yes	  
WEB32	Advice Only	YNNYYNNYNNNNYYNNYNY	Yes			No	  
WEB33	Graduation Checklist	DGW_Report.xlsl	No	No	No	No	  
WEB36	Registration Checklist	DGW_Registration.xlsl	No	No	No	No	  
WEB44	Exceptions Worksheet	AuditExceptions.xlsl	Yes	Yes	Yes	Yes	  
WEB50	Financial Aid Report	DGW_Aid_Report.xlsl	Yes	No	Yes	Yes	  
WEB51	Aid and Academic Report	DGW_Aid_Report.xlsl	Yes	No	Yes	Yes	  
WEB55	Athletic Eligibility Report	DGW_Ath_Report.xlsl	Yes	No	Yes	Yes	  



Customizing Report Formats

RPT036 Audit Report Formats

Audit Report * WEB31		
Title Student View	XSL Stylesheet DGW_Report.xml	Show Block Remarks Yes
Show Block Qualifiers No	Show Block Exceptions No	Show Block Include List Yes
Show Block Advice Yes	Show Show Rule Remarks Yes	Show Rule Qualifiers Yes
Show Rule Exceptions Yes	Show Rule Advice Yes	Show Rule Requirement Text No
Show Rule Courses Applied Yes	Show Fall-through (Electives) section Y - Show a single section	Show Insufficient (Failed) section Yes



Customizing Report Formats

Show SS GPA in header Yes	CourseLinkTitle Order 1	CourseLinkDescription Order 2
CourseLinkCoPrereq Order 3	CourseLinkAttribute Order 4	CourseLinkSections Order 5
CourseLinkRegister Order 6	CourseLinkTransfer Order	CourseLinkLocal Order
FOP XSL Stylesheet	Show Progress Bar Requirements	Show Progress Bar Credits No

Note: CourseLink order *must* be numerated or else course information will pull up blank.



Customizing Report Formats

Controller > CFG020 > COURSELINK

Course Information



FIN 3301 - 3 Credits - Financial Management I

Analyze financial decision-making at the corporate level with emphasis on the maximization of stockholder wealth. Learn financial statement analysis, the valuation of stocks and bonds, cost of capital, capital budgeting, dividend policy, leverage and capital structure, methods of firm valuation, working capital management, mergers and acquisitions, and bankruptcy. Prerequisite(s): ACCT 2302 or ACCT 2402 and ECON 2301.

Sections:

Term	CRN	Section	Seats open	Meeting times
Summer 2022	60127	115	5 (out of 24)	To be announced
Fall 2022	80242	110	18 (out of 24)	To be announced
Fall 2022	80523	120	23 (out of 24)	To be announced
Fall 2022	80524	130	14 (out of 24)	To be announced



Creating Custom Variables

Worksheets



Data refreshed 1/25/2022 1:23 PM

Student ID: W01016178
Name: Testing, Test
Degree: Bachelor of Business Admin.

Advanced search

Level	Undergraduate	Classification	Freshman	Major	Marketing	Program	BBA - Marketing	College	Business Administration	Overall GPA	3.346
Holds	6 Drops Remaining (Info Only), Orientation Required, Academic Advising Hold						Catalog Year	Spring 2022			



Academic What-If Financial Aid

View historic audit

Format: Student View

Degree progress



Requirements

In-progress classes Preregistered classes Process

Add any number of custom variables to your student header. Goal data must exist in Banner.



Creating Custom Variables

Step 1: Enable Custom Items

dash.studentHeader.custom.enabled

Add specification

Back to search

Enable custom data from SCR002 and RPT046 to appear in the student header; edit dash.studentHeader.custom.items to control which items appear.

Specification ↑

Value

default



True



Creating Custom Variables

Step 2: Enable Localizations

localization.internationalization.enable

Add specification

Back to search

Set to false to disable localized internationalization properties in any application, so only baseline properties will be used. Default is true.

Specification ↑

Value

default

→ True
























Creating Custom Variables

Step 3: Add Variable to SCR002

SCR002 Custom Data

[Back to search](#) [Add record](#) [Import](#) [Export](#)

Key ↑	Description	Data Element	Edit Element 1	Edit Type 1	Edit Value 1	Edit Element 2	Edit Type 2	Edit
ACADSTANDING	Academic Standing	R323	R322	EV	ACADSTANDING			  
ADVISOR	Academic Advisor	R323	R322	EV	ADVISOR			  
AEAFIRSTTERM	AEA: First official term	R323	R322	EV	AEAFIRSTTERM			  
APMS	Military Science Test Score	1292	1291	EV	APMS			  
ATTRIBUTE	Banner Student Attributes	R323	R322	EV	ATTRIBUTE			  
CAT_YRLIT	Catalog Year	R323	R322	EV	CAT_YRLIT			  
GRADAPP	Graduation Application Status	R323	R322	EV	GRADAPP			  



Creating Custom Variables

Step 4: Add Variable to Custom Items List

dash.studentHeader.custom.items

When enabled, these custom items will appear in the student header. If this field is empty then all items will appear. The keys in SCR002 and RPT046 should be placed here as a lowercase list of keys in the order you want them to appear on the screen.

Specification default

Value

acadstand, gpain, gpaov, hold, minor, cat_yrlit, g

Cancel

Save



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Creating Custom Variables

Step 5: Give Your Variable a Name

Labels and messages for the Responsive Dashboard ←

DashboardMessages.properties ←

Editor Details

Baseline Resource

```
1 # $Id$
2 # Copyright 1995-2018 Ellucian Company L.P. and its affiliates.
3
4 dash.login.title=Responsive Dashboard Sign In
5 dash.login.scriptWarning=You need to enable JavaScript to run this application.
6 dash.login.error=Sign in failed, please try again.
7 dash.login.header=Sign In
8 dash.login.label.username=Username
9 dash.login.label.password=Password
10 dash.login.button.signIn=Sign in
11 dash.login.footer=Ellucian Degree Works - Copyright 1995-2020 Ellucian Company L.P. and its af
12 dash.login.component.Logo.logo=Ellucian logo
13 dash.login.component.TextField.hide=Hide
14 dash.login.component.TextField.show=Show
15 dash.login.component.TextField.toggleVisibility=Toggle visibility of password
16
17 dash.logout.title=Signed out of Dashboard
18 dash.logout.header=You are signed out of Dashboard.
```

Localized Resource

Enabled

[Copy](#) [Save](#)

```
27 dash.errorBoundary.header=Error
28 dash.errorBoundary.title=An error occurred
29 dash.errorBoundary.message=This error is not recoverable. Reload and try again.
30 dash.errorBoundary.moreInfo=More information for technical support:
31 dash.errorBoundary.reloadButton=Reload
32
33 dash.home.title=Dashboard
34 dash.home.scriptWarning=You need to enable JavaScript to run this application.
35
36 #RWOLFORK 5.17.22
37 dash.studentHeader.custom.acadstand=Academic Standing
38 dash.studentHeader.custom.gpain=Institutional GPA
39 dash.studentHeader.custom.gpaov=Overall GPA
40 dash.studentHeader.custom.hold=Holds
41 dash.studentHeader.custom.cat_yrlit=Catalog Year
42 dash.studentHeader.custom.advisor=Advisor
43 dash.studentHeader.custom.gradapp=Graduation App Status
44 dash.studentHeader.custom.teachered=Teacher Education Program
```



Creating Custom Variables

Step 5 Cont: Give Your Variable a Name

```
#RWOOLFORK 5.17.22  
dash.studentHeader.custom.acadstand=Academic Standing  
dash.studentHeader.custom.gpain=Institutional GPA  
dash.studentHeader.custom.gpaov=Overall GPA  
dash.studentHeader.custom.hold=Holds  
dash.studentHeader.custom.cat_yrlit=Catalog Year  
dash.studentHeader.custom.advisor=Advisor  
dash.studentHeader.custom.gradapp=Graduation App Status  
dash.studentHeader.custom.teachered=Teacher Education Program
```

Remember: Variables will only populate if there is goal data for that item



Creating Custom Variables






















Step 6: Convert SQL to Ban080

```
SELECT B.SOVLCUR_TERM_CODE_CTLG  
FROM SOVLCUR B  
WHERE SOVLCUR_PIDM = 211151  
AND B.SOVLCUR_TERM_CODE_CTLG = (SELECT  
MAX(B.SOVLCUR_TERM_CODE_CTLG) FROM SOVLCUR A WHERE  
A.SOVLCUR_PIDM = B.SOVLCUR_PIDM)  
ORDER BY B.SOVLCUR_TERM_CODE_CTLG;
```



Creating Custom Variables

Step 6 Cont: Extract Variable Using BAN080

CAT_YRLIT:COLUMN	B.SORLCUR_TERM_CODE_CTLG	  
CAT_YRLIT:REPORT	STVTERM	  
CAT_YRLIT:TABLE	SORLCUR B	  
CAT_YRLIT:WHERE_1	B.SORLCUR_TERM_CODE_CTLG = (SELECT MAX(A.SORLCUR_TERM_CODE) FROM SORLCUR A	  
CAT_YRLIT:WHERE_2	WHERE A.SORLCUR_PIDM = B. SORLCUR_PIDM)	  
CAT_YRLIT:WHERE_3	AND B.SORLCUR_CURRENT_CDE = ('Y')	  
CAT_YRLIT:WHERE_4	AND B.SORLCUR_LMOD_CODE = ('LEARNER')	  

Note: You can verify you completed this step correctly by checking the “Student Data” report



Creating Custom Variables

Student Data Report

Student ID

Student data was last bridged 05/17/2022 at 15:51

Student data last changed 05/17/2022 at 15:51

Why might the dates be different?

Primary-Mst Student-Mst

Goal-Dtl¹ GoalData-Dtl³ Term-Dtl¹

Class-Dtl² Transfer-Dtl¹⁰ Noncrse-Dtl⁰

Attr-Dtl¹⁵ Custom-Dtl⁰ **Report-Dtl⁶**

Test-Dtl⁰ Aid-Dtl⁰ Previnst-Dtl⁰

Click on “Report-Dtl” (Report Detail) to verify custom items.

Report-Dtl	
ReportCode	ReportValue
CAT_YRLIT	Spring 2022
GPACREDITSOV	32
GPACREDITSTR	32
GPAOV	
GPATR	
HOLD	6 Drops Remaining (Info Only)



Plans

Plans ✉ ⋮

Data refreshed 2/1/2022 2:29 PM

Student ID
W01016178 ✕

Name
Testing, Test

Degree
Bachelor of Business Admin.

[Advanced search](#)

Level Undergraduate **Classification** Freshman **Major** Marketing **Program** BBA - Marketing **College** Business Administration **Overall GPA** 3.413

Holds 6 Drops Remaining (Info Only), Orientation Required, Academic Advising Hold **Catalog Year** Spring 2022

New plan

If there is already a plan in place for the student it will list in order of last modified. Select the plan you want to work on by clicking on the plan description/title. If there is no plan in place or to begin working on a new plan simply select “New plan.”



Plans

Create Plan

Would you like to create a plan based on a template or would you like to start from scratch?

Select template Blank plan

Next, determine if you would like to work off a template or begin your plan from scratch.



Plans

Select a Starting Term ×

Please select a term to serve as your starting term for this plan

 ▼
Cancel Submit

In our example, we selected “Blank plan.” Next, we select the starting term from the drop-down list. The starting term is the first semester in your plan.



Plans

Edit Plan

Description*

22-23 BBA - Marketing Plan

Active Locked

Check "Active" if you want to make this plan the active/current plan for the student.

By locking the program, the student will not be able to edit the plan. Advisors will still be able to edit the plan.

Cancel Save

Give your plan a title in the "Description" box. We recommend giving your plans a consistent naming convention for easy identification. **Important:** Plans must be marked "Locked" and "Active" to use the tracking feature.



Plans

22-23 BBA - Marketing Plan  

Plan list

New plan

Degree Bachelor of Business Admin.

Level Undergraduate

Active Yes | **Status** Locked | **Tracking Status** NOT TRACKED

Last updated: Woolfork, Rachael N on 1/31/2022

[Planner Audit](#) [Planner What-If](#) [Save as copy](#) [Create block](#)



< Requirements >

Choice +

Course +



Non-Course +

Placeholder +



Add term



Spring 2022  
NOT TRACKED Credits: 0.0

+

After pressing “Save” a new plan will generate ready for customization.



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Plans

☰

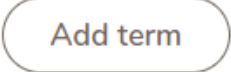
< Requirements >

- Choice +
- Course +
- Non-Course +
- Placeholder +

< >

Spring 2022  

NOT TRACKED Credits: 0.0

+ 

✕

Begin by adding terms to your plan.



Plans

The screenshot displays the 'Plans' interface. On the left, a 'Requirements' sidebar lists four categories: Choice, Course, Non-Course, and Placeholder, each with a plus sign. The main area shows three terms: Spring 2022 (NOT TRACKED, Credits: 0.0), Summer 2022 (NOT TRACKED, Credits: 0.0), and Fall 2022 (NOT TRACKED, Credits: 0.0). A context menu is open over the Summer 2022 term, listing three options: 'More information', 'Delete this term', and 'Reassign this term'. The 'Add term' button is visible in the top right corner.

Once you've added your terms you can modify them by selecting the three vertical dots to the right of the term header. Next, you'll begin adding requirements.



Plans

< Requirements >

Choice	+
Course	+
Non-Course	+
Placeholder	+

Choice: Add when there are multiple course options that can be used to satisfy a given requirement.

Course: Add when there is only a single course that can be used to satisfy a requirement.

Non-Course: Add when there are non-course requirements to be completed such as a thesis requirement. Note that “non-course” requirements are not tracked.

Placeholder: Add as an informational placeholder. When selecting this option you may choose from a list of predetermined values such as “Any Level Elective.” Alternatively, you can enter a comment such as “Apply for Graduation.” Placeholders are not tracked.



Plans

New Requirement ×

Requirement type
Course

Term *
Summer 2022 ▾

Critical

BIOL 1306 🔍

You searched for: BIOL 13

Credits
3.0

Minimum grade ▾

Cancel Save

Once you select requirement type, drag and drop it into the semester to be applied.

In this example, we selected a “Course” requirement and dropped it into the Summer 2022 term.

Begin by typing the course prefix and number into the “Course requirement” box. A list of matching courses will begin appearing under the box as you type. **This drop down list is finicky – type slowly to ensure accurate results.**

Once you identify the correct course the number of credits will automatically populate.

Select a minimum letter grade if applicable.



Plans

The screenshot displays a user interface for managing academic plans. On the left, a sidebar titled 'Requirements' lists four categories: Choice, Course, Non-Course, and Placeholder, each with a plus sign. The main area shows three terms: Spring 2022 (Credits: 0.0, NOT TRACKED), Summer 2022 (Credits: 3.0, NOT TRACKED), and Fall 2022 (Credits: 0.0, NOT TRACKED). Each term has a plus sign button. The Summer 2022 term is expanded to show a requirement for 'BIOL 1306' (Credits: 3.0). This requirement has a three-dot menu icon and a small page icon. Red arrows point to these icons with the labels 'Modify requirement' and 'Add a note' respectively. An 'Add term' button is visible in the top right corner of the main area.

Once saved, the requirement will generate under its applicable term. From here, the requirement may be dragged and dropped into a different semester. You can also modify a requirement by clicking the three vertical dots at the top right-hand corner of the requirement. You may add notes by clicking on the small page icon.



Plans

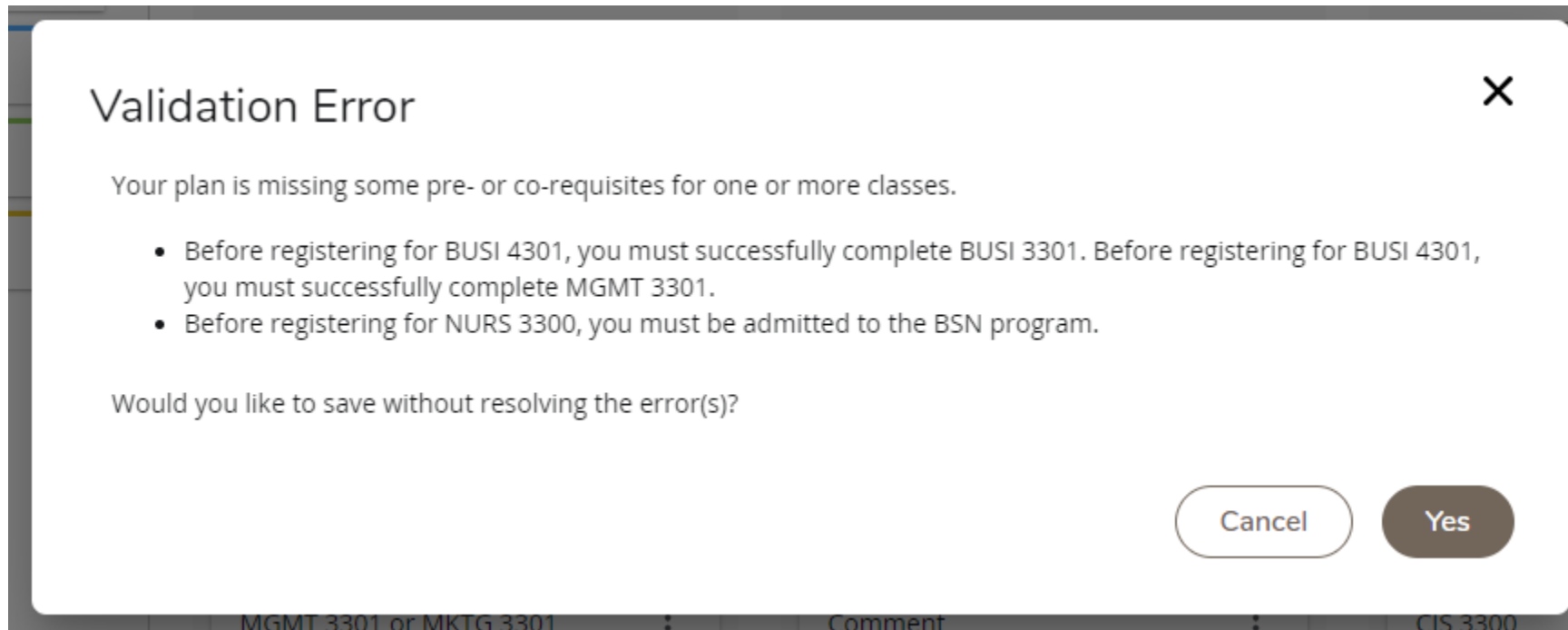
The screenshot displays a course planning interface with three panels. The first panel, titled 'Requirements', has a right-pointing arrow highlighted with a red box. Below the title are four categories: 'Choice', 'Course', 'Non-Course', and 'Placeholder', each with a blue plus sign. The second panel, titled 'Still Needed', lists several requirements: 'Texas Common Core- Marketi...', 'Social/Behavioral Science (0... >', 'Principles of Financial Accou... >', 'Required Institutional Cours... >', 'Major in Marketing', 'Principles of Economics: Mic... >', and 'Principles of Financial Mana... >'. The right-pointing arrow for the last item is highlighted with a red box. The third panel, also titled 'Still Needed', shows a 'Major in Marketing' plan with a list of courses. Under '3 Credits in', the course 'FIN 3301 Financial Mana...' is highlighted with a red box. An information icon (i) is visible to the right of the course name.

You can also click on the arrow to the right of requirements to view the “Still Needed” page. This page includes a descriptive list of remaining program requirements.

Identify the requirement you want to select and click on the arrow to the right. The applicable course(s) will appear. From here, you can drag and drop the course(s) directly into the plan.



Plans



When adding a requirement you may come across a “Validation Error.” Usually, these errors serve as a warning that an assigned course may have pre-requisites that the student has not met. You can override the message, but the validation error will reappear after every plan update until the error is resolved.



Plans

The screenshot displays a user interface for creating academic plans. On the left, a 'Requirements' sidebar lists categories: Choice (+), Course (+), Non-Course (+), and Placeholder (+). The main area shows three columns for different terms: Summer 2022 (6.0 credits), Fall 2022 (6.0 credits), and Spring 2023 (9.0 credits). Each column contains a list of courses and requirements, such as BIOL 1306, BUSI 4301, HIST 1302, FIN 3301, NURS 3300, MGMT 3301 or MKTG 3301, CIS 3300, and a thesis requirement. Each item includes a credit value and a 'NOT TRACKED' status. A '+ Add term' button is located at the top right of the main area.

Once the plan is complete it may look something like our example to the left.

You can return to modify your plan as often as needed.

Note: Students can export their plans to College Scheduler to register for classes.



Communication Strategy

- ❑ Create PowerPoint step-by-step visuals for major functional points
- ❑ Provide one-on-one trainings for key stakeholders such as Registrar and Advising staff
- ❑ Consider running Classic and Responsive Dashboard simultaneously during transition phase
- ❑ Establish a permanent resource page for students, faculty, and staff to visit at convenience
- ❑ Promote enhanced versatility – can be used on tablets, phones, etc.



Questions & Contact Information

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