

Degree Works  
**Release Guide**  
Release 5.0.3  
December 2019

# Notices

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# Introduction

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This document discusses Degree Works Release 5.0.3. This release has been previously referenced by its code name which was FELIX.

The central theme of Release 5.0.3 parallels that of Release 5.0.2, the previous release. It involves the user experience - the look, feel, and navigation capabilities of our administrative tools Shepentry and Surecode which were combined into a single new application name Controller, as well as a functional interface, SEP Template Management. Moving in this direction requires a technology refresh which addresses critical issues for both new sales and the support of customer satisfaction in the installed base.

This UI update was accomplished by introducing a new technology stack to support the front-end development (ReactJS). Consistency of display was accomplished by using components from the Ellucian Design System (EDS 2.0) library.

## Release 5.0.3 Highlights

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This release is a “MINOR” release so the version has been assigned as 5.0.3 and it will build on the baseline established by the previous “MAJOR” release DW5.0.0 and subsequent releases. This is still a significant release in terms of the product direction, and it continues to build on the infrastructure introduced for Cloud delivery.

## Roadmap referenced enhancements

### **Integrate SEP Template Management into the Responsive Dashboard user interface.**

- Now a consistent user experience to the Student Educational Planner

### **Combine Surecode and Shepentry into a new component: Controller**

- Improved, modern design, following Ellucian Design Standards
- WCAG 2.0 AA compatible for accessibility

### **Deliver enhanced capabilities for the Responsive Dashboard**

- Responsive Dashboard now fully responsive
- Improvement to Exception processing flow
- Athletic Eligibility Audit
- Localized external links
- Look Ahead functionality

## Subtractions

With every move forward in technology infrastructure, some features that are based on older technologies become difficult to support. You should plan on the following features no longer being available.

- SHPSPML

With this release, the SHPSPML ID provisioning will no longer be supported

- SOC Worksheet

With this release, the SOC worksheet will no longer be supported: The Department of Defense (DoD) announced the sunset of the Servicemembers Opportunity Colleges (SOC) Degree Network System (DNS) and Career Technical Education (CTE) resource list on March 29, 2019 to focus on initiatives that better reflect today's higher education landscape.

## Customer Satisfaction

There are other enhancements listed in the *Functional Enhancements* section of this Release Guide. Defect repairs have also been included with this release and are listed in the separate *Degree Works Problem Resolutions 5.0.3* document provided.

## The New Visual Metaphor

Starting with Release 5.0.2, Ellucian introduced a new visual metaphor based on a design concept where information is clustered in “visual cards” to enhance the user experience when interfacing with Degree Works. Our motivation for adopting this new metaphor is that as an information container, cards may contain important data elements such as text, rich media, buttons, and so forth. The contents then drive the card to adapt its size to that of different devices and screens, enhancing the user experience through a responsive user interface.

Compared to traditional UI design, an immediate advantage of the card UI is that it provides a more personalized user experience, making the entire interface more simple, clear, and balanced. The cards and the new interface were also geared to providing the right information at the right time, tailored to the end user needs. Our goal was to re-imagine the experience as much as we could while maintaining enough of the previous flow to make the transition smooth.

All components of Degree Works will eventually be deployed using this metaphor.

## Naming of the new user interfaces first introduced in Release 5.0.2

### DASHBOARD

The label used to describe the older version of the Dashboard is simply “Dashboard”. This next generation we are introduced in Release 5.0.2 was labeled the “Responsive Dashboard” to differentiate which dashboard we are referencing.

### STUDENT EDUCATIONAL PLANNER (SEP)

With Release 5.0.2, Ellucian also introduces the fourth generation of the Student Educational Planner component, which is generally referred to as “SEP”. The first generation is no longer in use by any customer, and the second generation has been called the “Classic Version”. With 4.1.1 (2011 and 2012) a “New” version, aka “Next Generation” version was introduced. All three of these versions have been called “SEP”. And now we have another new version of SEP and the problem is how do we refer to it while our customer base has both the 2nd and the 3rd generations in production? For simplicity, we are going to call this newest generation of the Planner “SEP4” – that’s SEP-FOUR when said aloud. For absolute clarity, we may now start referring to the previously mentioned Classic Version as SEP2 and the Next Generation Version as SEP3 when we need to explain some key enhancement or improvement or change from one to another.

In conversation and in public documents, we will continue saying simply “SEP” when referring to the current version of the Student Educational Planner. We will use these new labels only in the context when the situation calls for specifying which generation is being discussed.

### TRANSIT

The newer web-based Transit introduced in Release 5.0.2 will now be referenced as “Transit”. The older version of Transit will be called “PC Transit”.

## Using both the old and the new user interfaces

### Using the new Responsive Dashboard and old Dashboard concurrently (includes Student Educational Planner and Template Management)

You can deploy the Responsive Dashboard in the same environment as the Dashboard and use both applications concurrently.

This is useful if you want to grant access to a set of users to test the Responsive Dashboard interface while keeping the old Dashboard interface in place. Note that when pointing to the same database and classic environment, both applications use the same underlying infrastructure – Shepherd keys and groups, most Shepherd settings, UCX tables, etc. – so any changes made for one application will likely impact the other. We are thus able to enforce the same restrictions and configurations in the Responsive Dashboard as had been set for the previous Dashboard. Both user interfaces interact with the same data as well and could be used interchangeably if desired.

The most significant change is that due to the new technology stack used, customers do not have access to all the underlying code to allow the high level of localization in the Responsive Dashboard as had been previously supported by the Dashboard. However, all the following are supported by the Responsive Dashboard:

- Institution branding allowed with the Theme option
- BAN080 Custom and Report data is still displayed
- All Labels and Text on the dashboard are localizable through properties files
- Switches previously updated in the XSL code have been surfaced as configurations

### Using the new web-based Transit and PC Transit

Ellucian highly recommends that you move to the new web-based Transit as part of your implementation of the 5.0.3 release as we believe this UI has much to offer.

You may continue to use PC Transit while you verify the functionality in the new Transit application or find there is functionality you require only available in PC Transit.

However, a job launched in Transit cannot be viewed or managed by PC Transit, or vice versa. Jobs launched by one UI will only remain in the domain of that UI.

In a similar vein, jobs launched in cron using the bannerextract, colleagueextract, RAD11JOB, etc scripts will only be visible in PC Transit. The script to use that is compatible with web-based Transit is the *launchjob* script. Please see the *Banner Considerations Technical Guide 5.0.3*, *Colleague Considerations Technical Guide 5.0.3* or *Bridge Interface Format Technical Handbook 5.0.3* for more information.

## Using Controller and DWShell (Surecode and Shepentry)

With 5.0.3 Ellucian is introducing a new component known as Controller which combines features of both Surecode and Shepentry which are being obsoleted. It is critical that you begin using Controller before the end of 2020. The Controller component will only work with these Degree Works releases: 5.0.0, 5.0.1, 5.0.2, 5.0.3.

Surecode and Shepentry (delivered in DWShell) use a development tool called Adobe Flex, which is based on Adobe Flash. Adobe is discontinuing the Flash component effective December 31, 2020 – at the end of the year these applications will stop working once Flash goes away.

Refer to the article # [000045939](#) for more information.

After looking through this release guide, you may decide to put off upgrading to 5.0.3, but it is essential that you at least install Controller and adopt a 5.0.x release. Controller is compatible with all of them. If you are currently on a 4.x.x release, you simply must move ahead to one of the 5.0.x releases. And to repeat, you must make the move to the Controller.

For convenience, you can certainly continue to use Surecode and Shepentry while you verify the functionality in the Controller application and become more familiar with the features and navigation in the new interface. You can do this because the Controller updates the same data as Surecode and Shepentry. Just remember Surecode and Shepentry stop working at the end of 2020 when Adobe pulls the Flash component from browsers.

## Functionality coming in subsequent releases

Release 5.0.3 is not a complete replacement for the user interface for Degree Works. In the next release (2020 Q1) we will continue to enhance the Responsive Dashboard user interface update by delivering the following significant components:

### **FINANCIAL AID WORKSHEET**

### **TRANSFER FINDER**

Now, for a point of potential confusion. If you are authorized to use these two components you will find these functions available on the Responsive Dashboard (because they were authorized to your user), but if you select them, you will get a notification that they are not implemented. This would be a situation where access to the prior version is essential for you to do your work.

Other functionality will continue to be added to the Responsive Dashboard in subsequent releases as it is prioritized. Remember that you can still use any of this functionality in the Dashboard (see previous section) until then.

### **WEBLOGIC SUPPORT**

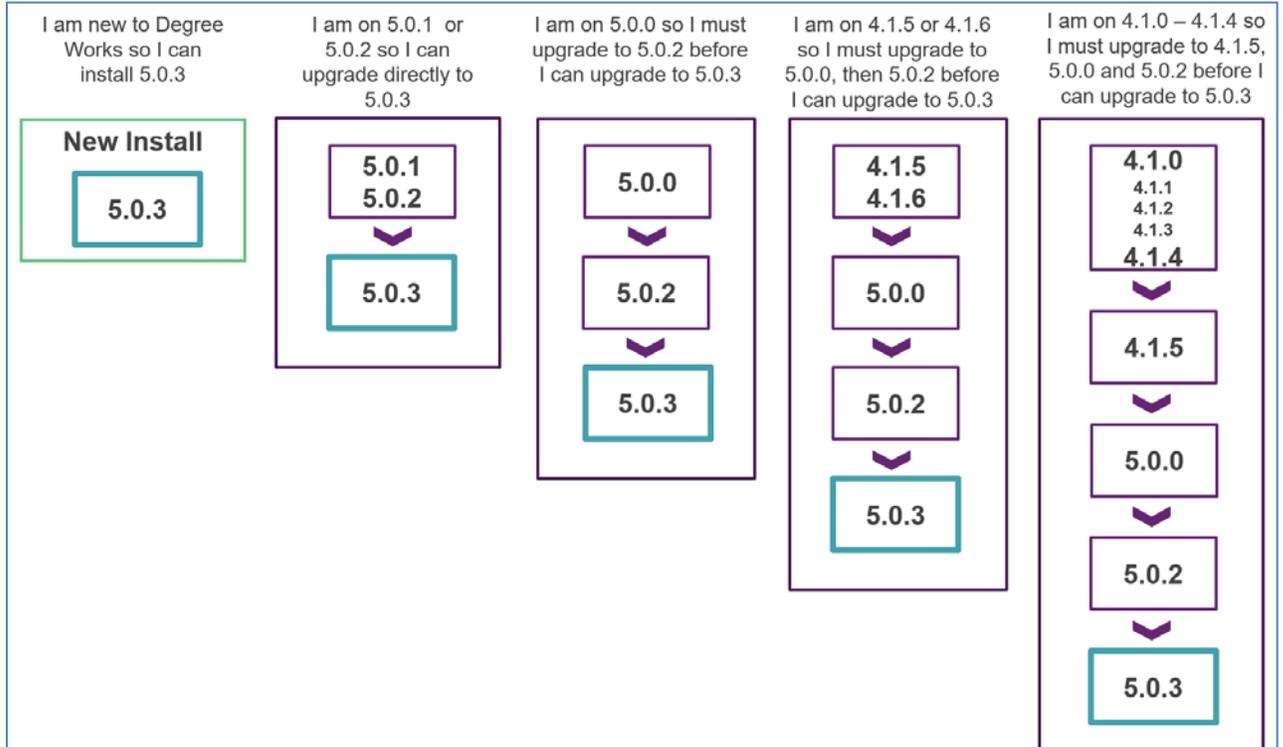
Degree Works supports Oracle 12c Release 2 (version 12.2.0.1) of the RDBMS. However, WebLogic 12.2 is not currently supported. There are no plans to support WebLogic 12.2.

You may be running WebLogic 12.2 to support other applications, but you may not use this instance with Degree Works. For Degree Works, you will need to install the Apache Tomcat server. This is an interim situation that we expect to solve with the next release in 2020 Q1.

Our plans are to eliminate the need to deploy an external java application server – so you will not be required to install any application server (WebLogic or Tomcat) to support the Degree Works java applications. This will be accomplished by embedding the application server in a standalone jar. As per the normal constraints in discussing future work, these plans are subject to change without notice.

# Upgrade Path

The Degree Works 5.0.3 software release supports a new installation or a direct upgrade path for existing customers currently on release 5.0.1 or 5.0.2.



Because DW 5.0.0 established a new baseline, an upgrade path has not been provided to jump from any release prior to 5.0.0 directly to 5.0.3. We encourage customers to stay current with releases so multiple jumps are not required when processing a new release upgrade.

For more details on the upgrade paths, see the *Degree Works Installation Guide 5.0.3*.

## Hardware and Software Requirements

Hardware and software requirements are located in the *Degree Works Installation Guide 5.0.3* under the section heading *New Installation Prerequisites and Instructions*.

## Functional Enhancements with 5.0.3

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This section highlights the functional enhancements that are delivered with the release.

### Controller

Enhancement #	Description
CR-000170757	<p>New application: Controller</p> <p>Controller replaces the Shepentry and Surecode applications. Controller includes the Users, Groups and Settings functionality of Shepentry; the Passport and Logs functionality has been deprecated. Controller also includes the primary functionality of Surecode to view, add, edit and validate UCX tables.</p>

### Responsive Dashboard

Enhancement #	Description
CR-000167946	<p>The worksheet is now fully responsive.</p> <p>The worksheet previously did not display well on a mobile device. These issues were addressed, and the audit worksheet is now displayed so that a superior user experience is provided when viewing audit results on a mobile device.</p>
CR-000167947	<p>Improved process flow of the Exceptions tab</p> <p>The Exceptions page in the Responsive Dashboard has been improved so that the user is allowed to first review the audit before creating the exception. And both the add-exception and remove-exception page have been combined into one page to make the experience more efficient.</p>
CR-000168925	<p>In-progress/Preregistered classes now sorting by term</p> <p>Classes in the In-progress/Preregistered section card of the audit were previously sorting by course discipline/number rather than term then course discipline/number.</p>

CR-000169112	<p>Allow SIS portal to link to Degree Works and pass in student ID as PORTALSTUID</p> <p>An external link using the studentId parameter can now be configured to link to the Responsive Dashboard. See the Banner Considerations Technical Guide or the Responsive Dashboard Administration Guide for more details (search for "studentId").</p> <p>This allows you to pass in the PORTALSTUID to pass in the student the advisor is evaluating in the SIS. The student is then opened in Degree Works without the advisor having to search for the student, as occurred in the previous Dashboard.</p>
CR-000169794	<p>All exceptions grouped together so they can be easily removed</p> <p>On the Exceptions page on Responsive Dashboard, exceptions are now also shown together below the blocks so the user can easily review and delete in one place as needed.</p>
CR-000169795	<p>Athletic Eligibility Audit</p> <p>The Athletic Eligibility Audit has been added to the Responsive Dashboard.</p>
CR-000169796	<p>Allow external links</p> <p>You may now add external links to the Responsive Dashboard. You can link to any site on or off campus from within Degree Works. Please see the "External Links" section of the Responsive Dashboard Administration Guide for more information about configuring this feature.</p>
CR-000167945	<p>Look Ahead audit</p> <p>The Look Ahead audit has been combined with the What-If audit to improve efficiency in the user interface. This has now been improved by adding a checkbox to use the current curriculum parameters of the student, so they do not need to be re-entered unless they are also part of the changes being requested as part of the What-If process.</p>

## Student Educational Planner (SEP4)

Enhancement #	Description
CR-000170030	<p>Added additional Course Link functionality to the planner</p> <p>The new planner now has Course Link support showing in the still-needed sidebar, the course list sidebar and the requirement pop-up.</p>
CR-000170130	<p>The block title now appears in the Still Needed display of the planner</p> <p>By adding the block title in the Still Needed display, audit results are easier to understand since the remaining requirements are now displayed in the context of the audit results, separated by the appropriate block title.</p>
CR-000170759	<p>SEP4 is now fully responsive</p> <p>The Student Educational Plan delivered in the Responsive Dashboard previously did not display well on a mobile device. These issues were addressed, and the Plan is now displayed so that a superior user experience is provided when viewing and modifying SEP4 data on a mobile device.</p>

## Template Management

Enhancement #	Description
CR-000170760	<p>Template Management has been added to the Responsive Dashboard</p> <p>Now the same user experience for using both the Student Education Plan and the Template management feature are available in the Responsive Dashboard.</p> <p>There is now no need to use a different user interface for the Template Management functions than what was used for the Student Education Planner.</p>

## Problem Resolutions

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For comprehensive and detailed problem, impacts, and resolution information for all the defects corrected in this release, please refer to the supplemental *Degree Works Problem Resolutions 5.0.3* document delivered as part of the documentation suite provided for this release.

Object/Process	
API	1
Audit	2
Banner	3
Documentation	11
Install	1
Planner	1
Planner (SEP3)	2
Planner (SEP4)	17
Responsive Dashboard	19
Security	1
Shepentry	1
System	2
Transfer Equivalency	1
Transfer Finder	2
Transit	4
Web	1
<b>TOTAL:</b>	<b>69</b>

## Technical Artifacts

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This section lists the supplemental technical information for the 5.0.3 release. These files are in the documentation libraries on the Ellucian Customer Center, alongside the other Degree Works 5.0.3 documentation files.

- *Degree Works Schema* file  
This text file contains the data structure for the Degree Works database tables.
- *Degree Works Manifest*  
A separate **manifest-details-5.0.3.zip** file contains the details of what has changed in the Degree Works projects since the 5.0.2 release. The zip file contains very large documents. It is expected that you should use the search feature to determine the status of any specific file, rather than manually scrolling through the documents.

Each of the text files in the zip are broken out by project and have two manifest files:

1. The files listed in the MODIFIED manifests are those files that have been either modified or added since the 5.0.2 release
2. The files listed in the DELETED manifests are those files that have been deleted since the 5.0.2 release. If you find a file is listed in both the MODIFIED manifest AND the DELETED manifest, deletion has precedence (consider the file to have been deleted in 5.0.3)

In addition to the changes in the manifest files you can find out what shpscripts and resources were added or changed in the 5.0.3 release by running a SQL query against the Degree Works database (reference the *Degree Works Installation Guide 5.0.3*, “Reintegrate Localizations” section).

Since localizations affecting the applications should now be made in Composer, most if not all your changes should be restricted to those items found in Composer.

# Special Notes

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## Learning about Known Installation or Upgrade Issues

Before you install Degree Works 5.0.3, it would be important for you to refer to the following article at the Ellucian Customer Center which details any known issues:

<https://ellucian.force.com/clients/s/article/Degree-Works-5-0-3-Upgrade-Install-Master-Article>

The Article number is 000046338.

The screenshot shows the Ellucian Customer Center interface. The top navigation bar includes the Ellucian logo, 'Customer Center', and links for 'RESOURCES', 'SUPPORT', and 'TOOLS'. The main heading is 'Article #000046338'. Below this, the 'Article Details' section is visible, containing the following information:

- Title:** Degree Works 5.0.3 Upgrade/Install Master Article
- Summary:** This article is a central location for known issues with the 5.0.3 installation and upgrade
- Solution Details:** This is the **Master Article** for the Degree Works 5.0.3 install and upgrade.

Below you will find:

- **Important Notes**
- **Articles**
- **Defects**

Revisit this Article as needed if you have questions or issues with 5.0.3.

**Targeted Release date:** December 20, 2019

**Important Notes**

**Articles**

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**Review these Articles as soon as possible ("Really important articles for 5.0.3 basic functionality"):**

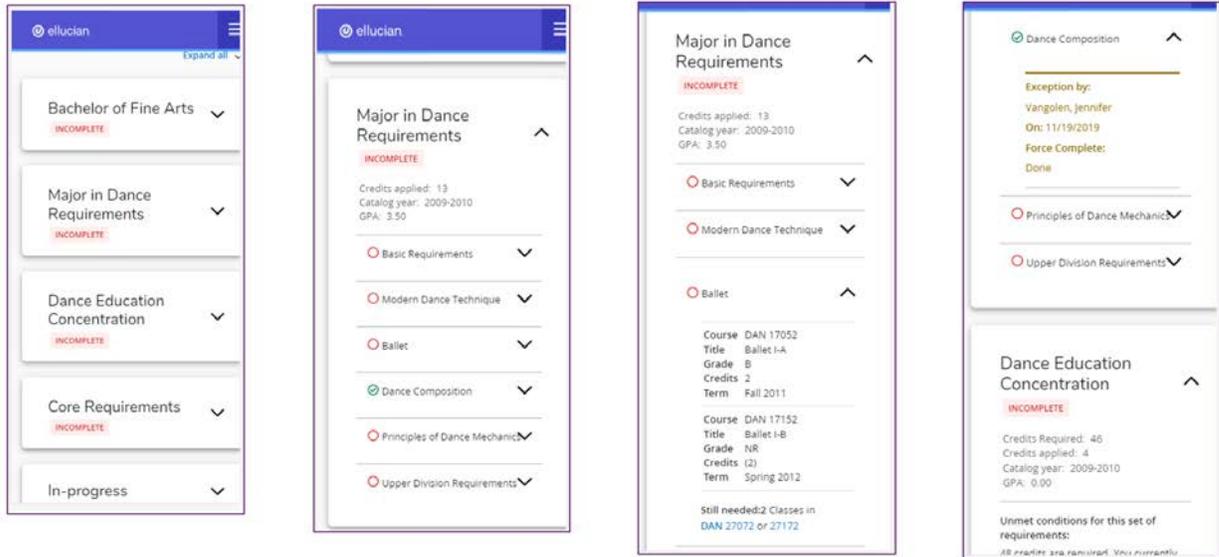
=====

# Screenshots

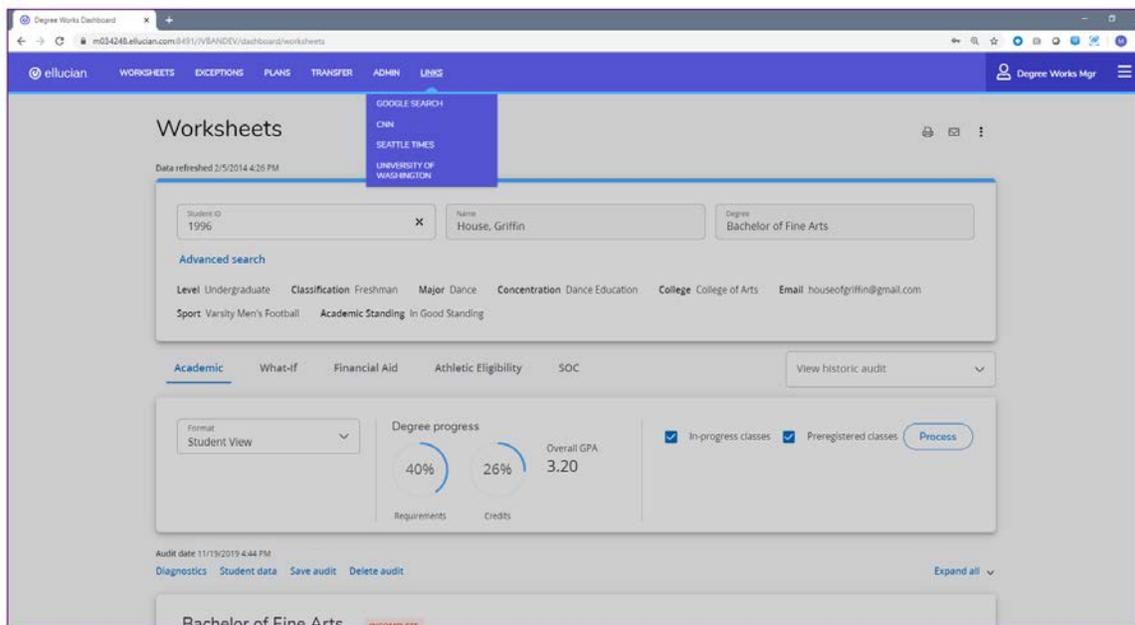
So that you can anticipate the visual changes introduced to some of the applications, here are a few screenshots of the new user interfaces delivered in this release.

## Responsive Dashboard

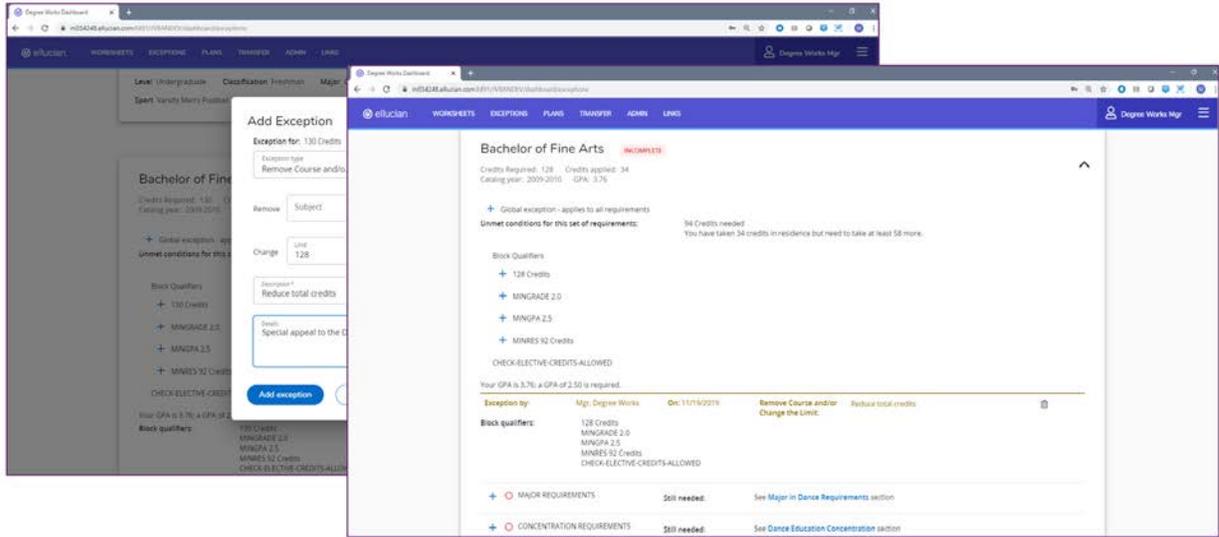
Degree Audit Worksheet displays more responsively in a mobile environment



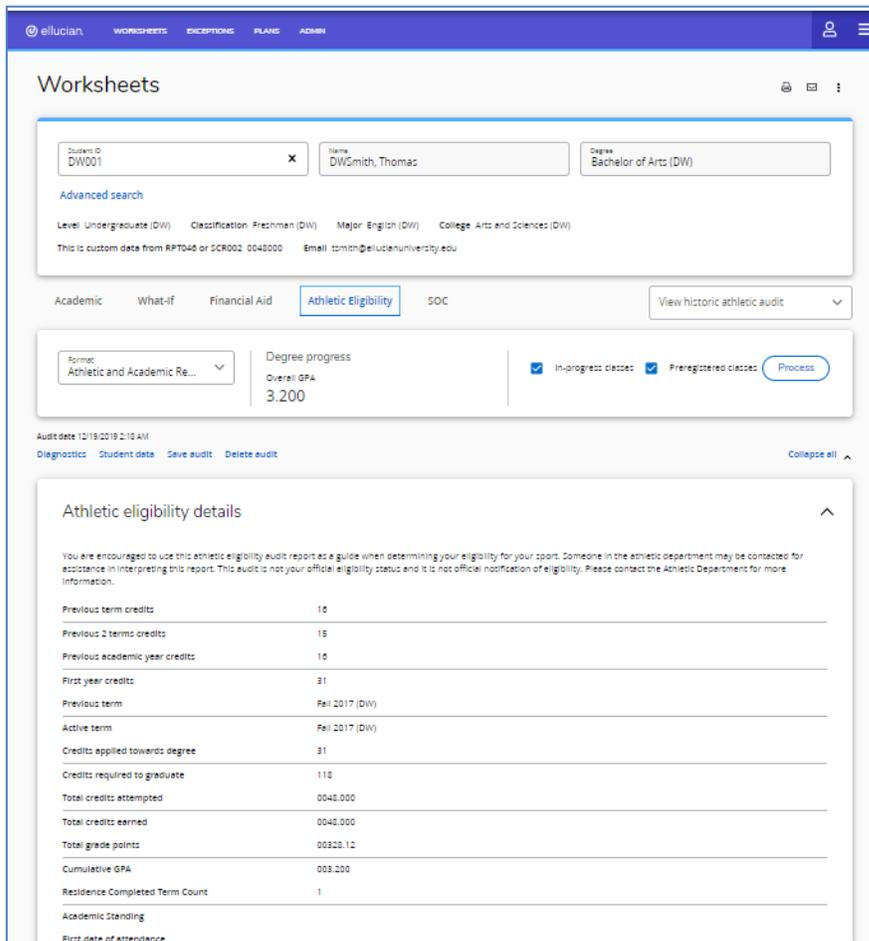
External Links have been added to the top menu



Exception processing experience has been improved

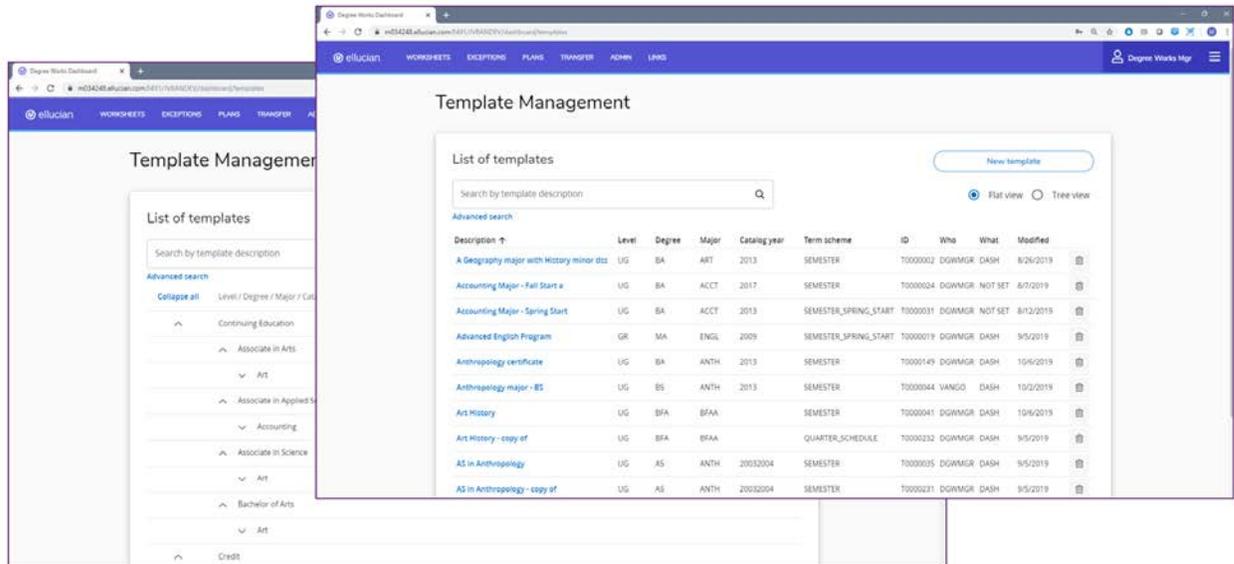


Athletic Eligibility Audit now supported in the Responsive Dashboard metaphor

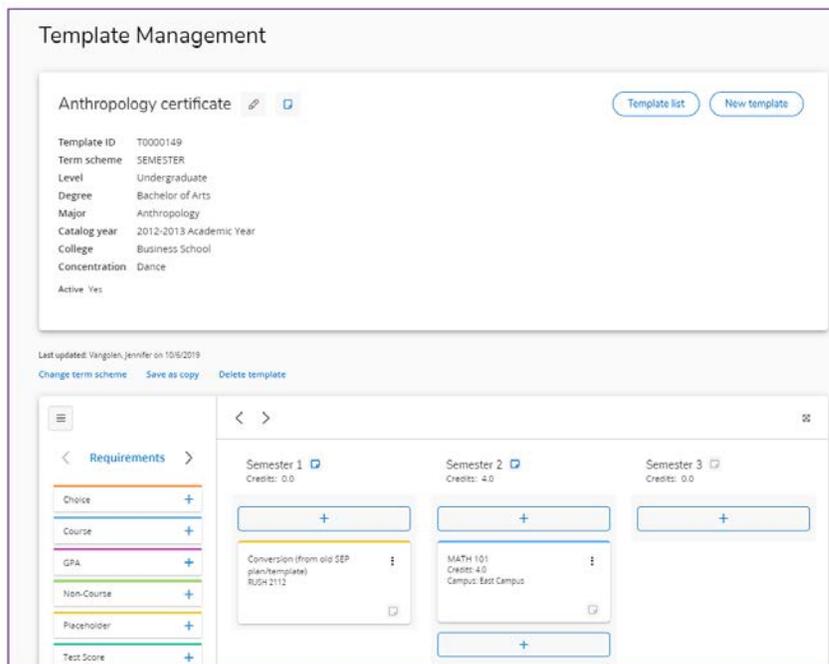


# Student Educational Planner – Template Management

Student Educational Planner now supported in the Responsive Dashboard metaphor. Template Lists can be displayed in the Tree view, or the Flat view



Template now displayed in same metaphor as the Plan and uses the same user experience



# Controller

## Controller: Maintain Users

The left screenshot shows the 'Controller' interface with the 'Users' tab selected. It features a search bar for users and a table listing user details. The right screenshot shows the 'User Information' and 'User Access' sections for a user named 'Mgr. Degree Works'.

User name	Access ID	Alternate username	Degree Works ID	Login date	Fail count
-	t18939	degree1@test.com	t18939	11/15/2013	00
DegreeWorks, Prerequisite	DGWSPREQ1	DGWSPREQ1	DGWSPREQ1		02
Manager, Degree Works	RAYMOND	RAYMOND			00
Mgr. Degree Works	DGWMGR	DGWMGR	DGWMGR	11/19/2019	00
QQ-Ambersens, Danielle Degree	QQAMPERD	QQAMPERD	QQAMPERD	8/25/2015	02

## Controller: Maintain Groups

The left screenshot shows the 'Controller' interface with the 'Groups' tab selected. It features a search bar for groups and a table listing group details. The middle screenshot shows the 'Group Details' page for a group named 'SRNREG'. The right screenshot shows the 'Group Details' page with a 'Modify Key' dialog box open.

Group	Description
SRNADV	Degree Works Faculty/Advisor
SRNADVX	Degree Works Advisor (no xpt)
SRNAO	Degree Works Financial Aid Off.
SRNAPP	DegreeWorks Applicant User
SRNATHL	Degree Works Athletics Dept
SRNREG	Degree Works Registrar User
SRNREG-2	DW SRNREG - 2nd set of keys
SRNREG-3	DW SRNREG - 3rd set of keys
SRNGTU	Degree Works Student User



# Documentation

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The following documentation resources are provided in support of release 5.0.3 and are delivered in PDF format. They are in the documentation libraries at the Ellucian Customer Center.

## Release Documentation

Ellucian Customer Center – Title
Degree Works Release Guide 5.0.3
Degree Works Installation Guide 5.0.3
Degree Works RabbitMQ Installation Guide 5.0.3
Degree Works 3rd Party Software List 5.0.3
Degree Works Problem Resolutions 5.0.3
Degree Works Manifest 5.0.3
Degree Works Manifest Details 5.0.3 ( <i>zip file</i> )
Degree Works Schema 5.0.3 ( <i>text file</i> )

## Administration Documentation

Ellucian Customer Center – Title	
Degree Works Composer Administration Guide 5.0.3	
Degree Works Controller Administration Guide 5.0.3	<b>NEW</b>
Degree Works Responsive Dashboard Administration Guide 5.0.3	
Degree Works Scribe Administration Guide 5.0.3	
Degree Works Student Educational Planner Administration Guide 5.0.3	
Degree Works Transfer Equivalency Self-Service Administration Guide 5.0.3	
Degree Works Transfer Finder Administration Guide 5.0.3	
Degree Works Transit Administration Guide 5.0.3	

## Technical Documentation

Ellucian Customer Center – Title	
Degree Works Advanced Reporting Technical Guide 5.0.3	
Degree Works Banner Considerations Technical Guide 5.0.3	
Degree Works Banner Data Mapping for BIF Technical Guide 5.0.3	
Degree Works Bridge Interface Format Technical Handbook 5.0.3	
Degree Works Colleague Considerations Technical Guide 5.0.3	
Degree Works Colleague Data Mapping for BIF Technical Guide 5.0.3	
Degree Works Configuration Technical Guide 5.0.3	<b>NEW</b>
Degree Works Prerequisite Checking Technical Guide 5.0.3	
Degree Works Technical Guide 5.0.3	
Degree Works Transit Jobs Technical Guide 5.0.3	<b>NEW</b>

## User Documentation

Ellucian Customer Center – Title	
Degree Works Scribe Language User Guide 5.0.3	
Degree Works Transfer Equivalency Admin User Guide 5.0.3	
Degree Works Web Interface User Guide 5.0.3	

## API Documentation

No new public APIs were delivered in Release 5.0.3 so there are no additional entries added to our API offerings documented at the Ellucian Customer Center.

Note that documentation for the all Degree Works APIs is not delivered with the other documents at the Customer Center but is located separately from those delivered in PDF format.

## Documentation not delivered for the 5.0.3 release

Degree Works Server Sizing Technical Guide

Not current as testing had been done using applications written with a different technology stack so results are not relevant to the applications delivered in this release.

Degree Works Shepherd Settings Technical Guide

Replaced by Degree Works Configuration Technical Guide

Degree Works Surecode UCX Tables Technical Guide

Replaced by Degree Works Configuration Technical Guide

Degree Works Shepentry User Guide

Replaced by Degree Works Controller Administration Guide

Degree Works Surecode User Guide

Replaced by Degree Works Controller Administration Guide

## Database Changes

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The Degree Works 5.0.3 release contains NO changes to the database.

Please review of the *Degree Works Schema* file can which provides more detailed information about the current database.

## Configuration Considerations

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The Degree Works 5.0.3 release requires customers to make manual modifications to several areas of the product. These areas are outlined in the *Degree Works Installation Guide 5.0.3*.