UR Student Demo Days
Academic Planning

January 2019
Chatting for Zoom Participants

For those joining the Zoom:

1) Please access the **Chat** feature at the bottom of your screen

2) Please chat directly with **Cindy Fronterre** (She will then pose questions on your behalf)

3) Select **Cindy Fronterre** in the drop down menu in the chat window (do not select “everyone”)
How to Ask Questions in Zoom

1. Select the Chat icon at the bottom of your Zoom Meeting screen
2. Select Cindy Fronterre to Chat with using the drop down arrow
3. Type your question in the text box area and hit the Enter key
# Agenda

- Welcome
- **DIFF/NEW** Academic Plan Features
- **DIFF** Academic Plan Templates
- **NEW** Student and Advisors Communicate via Plan
- **NEW** Registering from the Academic Plan
- **►** Reporting
- **►** Next Steps
Course and Course Section Update

- More information coming in February
Academic Plans

- Academic planning templates
- Student and Advisor communicate through plan
  - Advisor can approve, add comments, and send feedback if the student needs to make changes before the plan can be approved
- Update Plan / Request Plan Approval From Advisor
  - By academic period
  - For entire plan
- Create Schedule / Save Schedule / Register from Plan
DIFF: Academic Planning Templates

- Based on individual student’s attendance pattern
- Ability to create program of study (POS)-based templates
  - Future ability to have multiple templates per POS (e.g. Fall start, Spring start)
- Can be added to the student’s plan automatically through student onboarding, or added manually by an advisor
- Is not required for a student to create an academic plan
NEW: Student/Advisor Communicate via Plan

- Students can:
  - Update academic plan
  - Request advisor approval for academic plan
  - For one (1) semester or entire plan
  - Design multiple schedules from plan for registration
  - Register from the plan

- Advisor can:
  - View advisees plan(s) and saved schedules
  - Edit advisees’ plan
  - Approve, or send back with comments when the student requests an approval

- Note: The advisor and student are attached through a student cohort. Advisors with the academic plan approver cohort role have the ability to approve and send feedback on academic plans.
NEW: Registering from Academic Plan

Create → Save → Register
Advisor View
Accessing Advisor Information

Welcome, Sean Hanna

- **Announcements**
  - 1 item
  - UR Lease Administration Project New Go-Live Date
  - The Financial Accounting Standards Board (FASB) decided to a... Lease Administration Project

- **Inbox**

- **Applications**
  - 3 items
  - Reporting and Analytics
  - Favorites
  - My Advisees
Reporting
Advisor Dashboard Reports

- My Advisees report
- My Advisees Missing Grades report
Viewing Academics: Overview Tab

- Shows programs of study (POS) history for *Cindy School*
- These POS have requirements
  - ME Major
  - JPN Minor

---

<table>
<thead>
<tr>
<th>Program of Study</th>
<th>Program Area Type</th>
<th>Program Area</th>
<th>Declare Date</th>
<th>Expected Completion</th>
<th>Earned Credential</th>
<th>Conferral Date</th>
<th>Details</th>
<th>Status</th>
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<tbody>
<tr>
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<td>Discipline</td>
<td>Natural Sciences</td>
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<td>08/2019</td>
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<td>View</td>
<td>In Progress</td>
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<td>08/31/2015</td>
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<td>08/2019</td>
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<td>Japanese Minor</td>
<td>Discipline</td>
<td>Humanities</td>
<td>08/30/2017</td>
<td>08/2019</td>
<td></td>
<td></td>
<td>View</td>
<td>In Progress</td>
</tr>
</tbody>
</table>

**Add Program of Study**  **Add Advisory Program**
Academics View: Academic Progress Tab

Cindy School
Student | University of Rochester

Academics

Financial Aid
History
Action Items and Holds

Overview | Current Classes | Plan | Academic History | Competencies | Academic Progress | External Records

Mechanical Engineering BS Undergraduate Major
7 Satisfied of 12 Requirements

Japanese Minor
3 Satisfied of 3 Requirements

Cumulative GPA
3.579

Unused Registrations
6

Mechanical Engineering BS Undergraduate Major Requirements
Program of Study GPA
3.579
Requirements Effective
08/31/2015
Last Evaluated
11/21/2018 11:20:45 AM

<table>
<thead>
<tr>
<th>Requirements Area</th>
<th>Requirement</th>
<th>Satisfied With</th>
<th>Remaining</th>
<th>Status</th>
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<tbody>
<tr>
<td>College of Arts, Sciences and Engineering</td>
<td>128 Credit Hours Requirement</td>
<td>BME 101/ EAS 101 - Intro To Biomedical Engr CHEM 132 - Chm Concepts, Syst, Pract II CSC 170 - Intro Computer Programming CSSP 161/ PSYC 161 - Social Psychology EAS 141 - Basic Mechanical Fabrication</td>
<td>Minimum 19 Unit(s)</td>
<td>Not Satisfied</td>
</tr>
<tr>
<td>Primary Writing Requirement</td>
<td>WRTG 105 - Reason &amp; Writing in The College</td>
<td></td>
<td></td>
<td>Satisfied</td>
</tr>
<tr>
<td>2.0 Cumulative GPA</td>
<td></td>
<td></td>
<td></td>
<td>Satisfied</td>
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</table>
### Coursework

#### Spring 2018

<table>
<thead>
<tr>
<th>Course</th>
<th>Grade</th>
<th>Grade Points</th>
<th>Units</th>
<th>Earned Grade Points</th>
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</thead>
<tbody>
<tr>
<td>EAS 141 - Basic Mechanical Fabrication</td>
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<td>4.000</td>
<td>2</td>
<td>8.000</td>
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<tr>
<td>JPNS 152 - Intermediate Japanese II</td>
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<td>4.000</td>
<td>6</td>
<td>24.000</td>
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<tr>
<td>ME 223 - Heat Transfer</td>
<td>A</td>
<td>4.000</td>
<td>4</td>
<td>16.000</td>
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<tr>
<td>ME 241 - Fluids Lab</td>
<td>A</td>
<td>4.000</td>
<td>4</td>
<td>16.000</td>
</tr>
<tr>
<td>ME 260 - Engineering Computation II</td>
<td>A-</td>
<td>3.700</td>
<td>2</td>
<td>7.400</td>
</tr>
</tbody>
</table>

**Total:** 18 units, 71.400 earned grade points

### Academic Period Totals

- **Units Attempted:** 18
- **Units Earned:** 18
- **GPA Units:** 18
- **Academic Period GPA:** 3.967
Academics View: Current Classes Tab

- View **Course Listing** and **Grading** (current)
- Once grades come in, academic progress is automatically updated
Student Support Network – Student Cohort

- Advisors get “attached” to students through cohort(s)
  - ASE Class of 2020 (Junior)
  - Mechanical Engineering Program Advisor: Hanna
    - Select link to drill in
Individual Student Cohort View

### Mechanical Engineering Program Advisor: Hanna

<table>
<thead>
<tr>
<th>Academic Unit</th>
<th>College of Arts, Sciences and Engineering</th>
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</thead>
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<tr>
<td>Academic Level</td>
<td>(empty)</td>
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<tr>
<td>Cohort Type</td>
<td>Advising</td>
</tr>
<tr>
<td>Description</td>
<td>This cohort was created for the academic planning Demo and should not be carried forth to other tenants.</td>
</tr>
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</table>

#### Active Students in Cohort

<table>
<thead>
<tr>
<th>Academic Record</th>
<th>Date Added</th>
<th>Added By</th>
</tr>
</thead>
<tbody>
<tr>
<td>Landon Lattimore - Hajim School of Engineering and Applied Sciences/Undergraduate (BS) - 08/30/2017 - Active</td>
<td>01/15/2019 05:51:33 AM</td>
<td>shanna / Sean Hanna</td>
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<tr>
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<td>shanna / Sean Hanna</td>
</tr>
<tr>
<td>Michael Engineer - Hajim School of Engineering and Applied Sciences/Undergraduate (BS) - 08/29/2018 - Active</td>
<td>01/13/2019 11:06:24 PM</td>
<td>shanna / Sean Hanna</td>
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<tr>
<td>Hope Hall - Hajim School of Engineering and Applied Sciences/Undergraduate (BS) - 08/29/2018 - Active</td>
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<tr>
<td>Rocky Rochester - Hajim School of Engineering and Applied Sciences/Undergraduate (BS) - 08/30/2017 - Active</td>
<td>01/13/2019 11:08:25 PM</td>
<td>shanna / Sean Hanna</td>
</tr>
<tr>
<td>Amy Applicant - Hajim School of Engineering and Applied Sciences/Undergraduate (BS) - 08/28/2019 - Active</td>
<td>01/14/2019 02:35:38 PM</td>
<td>shanna / Sean Hanna</td>
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<tr>
<td>Adam Academicplan - Hajim School of Engineering and Applied Sciences/Undergraduate (BS) - 08/28/2019 - Active</td>
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<td>Arnie Academicplan - Hajim School of Engineering and Applied Sciences/Undergraduate (BS) - 08/28/2019 - Active</td>
<td>01/15/2019 05:46:15 AM</td>
<td>shanna / Sean Hanna</td>
</tr>
</tbody>
</table>
View Support Network for Student

- Replicates what the student sees about their advisor(s)
- Two roles for Sean Hanna
  - Program Advisor
  - Academic Plan Approver (this one connects to the academic plan approval business process)
### View Student Cohort History – Summer 2019

- **Class of 2023**

#### View Student Cohort History for Student

<table>
<thead>
<tr>
<th>Student</th>
<th>Arnie Academicplan</th>
</tr>
</thead>
</table>

2 items

<table>
<thead>
<tr>
<th>Academic Record</th>
<th>Date</th>
<th>Action</th>
<th>Student Cohort</th>
<th>Assigned By</th>
</tr>
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<tbody>
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<td>Mechanical Engineering Program Advisor: Hanna</td>
<td>shanna / Sean Hanna</td>
</tr>
<tr>
<td></td>
<td>01/15/2019 05:45:54 AM</td>
<td>Add</td>
<td>ASE Class of 2023</td>
<td>shanna / Sean Hanna</td>
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</table>
Academics View: Plan Tab

- **Academic Plan Template**
  - Advisors can update the plan and make suggestions

### 2019-2020 Semester Calendar

<table>
<thead>
<tr>
<th>Academic Period</th>
<th>Requirement</th>
<th>Course</th>
<th>Units</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fall 2019</td>
<td>Primary Writing Requirement</td>
<td>0</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Mechanical Engineering B.S. Technical Elective Course</td>
<td>0</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>CHEM 121 - Chem Concepts, Syst, Pract I</td>
<td>0</td>
<td>Eligible to Enroll</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Mechanical Engineering B.S. Mathematics Courses</td>
<td>0</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Spring 2020</td>
<td>Mechanical Engineering B.S. Natural Science Course</td>
<td>0</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Mechanical Engineering B.S. Mathematics Courses</td>
<td>0</td>
<td></td>
<td></td>
</tr>
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</table>
Student View
Student’s Accessing of Information

- Academics worklet
Student’s Academics Dashboard

- Support network with advisor assignment
- Access to Academic Plan
View My Academic Plan

- Updating the Plan

![Image of the 2019-2020 Semester Calendar]

<table>
<thead>
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<td></td>
<td>Mechanical Engineering B.S. Mathematics Courses</td>
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<tr>
<td>Spring 2020</td>
<td>Mechnical Engineering B.S. Natural Science Course</td>
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<td></td>
<td>CHEM 131 - Chm Concepts, Syst, Pract I</td>
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<td>Eligible to Enroll</td>
<td></td>
</tr>
<tr>
<td></td>
<td>ME 121 - Engineering Mechanics II</td>
<td>0</td>
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<td></td>
</tr>
</tbody>
</table>
# Updating the Plan by List

- Choose Course by selecting the field list icon, then name
  - **WRTG 105**

![Image of 2019-2020 Semester Calendar](Image)

- **Fall 2019**
  - Primary Writing Requirement
  - Mechanical Engineering B.S. Technical Elective Course
  - Mechanical Engineering B.S. Mathematics Courses

- **Spring 2020**
  - Mechanical Engineering B.S. Mathematics Courses
  - Mechanical Engineering B.S. Natural Science Course
  - Mechanical Engineering B.S. Mathematics Courses

- **Search**
  - **WRTG 105A - Reason & Writing In The College**
Updating the Plan by Type

- Choose Course by selecting the field and typing in name

### 2019-2020 Semester Calendar

<table>
<thead>
<tr>
<th>Academic Period</th>
<th>Academic Requirement</th>
<th>Course</th>
<th>Units</th>
<th>Status</th>
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</thead>
<tbody>
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<td>Eligible to Enroll</td>
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<tr>
<td></td>
<td>Mechanical Engineering B.S. Technical Elective Course</td>
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<td>4</td>
<td>Eligible to Enroll</td>
</tr>
<tr>
<td></td>
<td></td>
<td>CHEM 131 - Chm Concepts, Syst, Pract I</td>
<td>0</td>
<td>Eligible to Enroll</td>
</tr>
<tr>
<td></td>
<td>Mechanical Engineering B.S. Mathematics Courses</td>
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<td>4</td>
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</tr>
</tbody>
</table>

**Add**

**Remove**

**OK**

**Cancel**
Requesting Plan Approval

- Approval from Advisor
# Submission Confirmation

You have submitted
**Academic Plan Event:** Arnie Academicplan - Hajim School of Engineering and Applied Sciences/Undergraduate (BS) - 08/28/2019 - Active Arnie Academicplan's Plan

## Details and Process

**For**
Arnie Academicplan - Hajim School of Engineering and Applied Sciences/Undergraduate (BS) - 08/28/2019 - Active

**Overall Process**
Academic Plan Event: Arnie Academicplan - Hajim School of Engineering and Applied Sciences/Undergraduate (BS) - 08/28/2019 - Active Arnie Academicplan's Plan

**Overall Status**
In Progress

### Details

<table>
<thead>
<tr>
<th>Academic Period</th>
<th>Requirement</th>
<th>Course</th>
<th>Units</th>
<th>Status</th>
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</thead>
<tbody>
<tr>
<td>Fall 2019</td>
<td>Mechanical Engineering B.S. Mathematics Courses</td>
<td>MATH 161 - Calculus Ia</td>
<td>0</td>
<td>Eligible to Enroll</td>
</tr>
<tr>
<td></td>
<td></td>
<td>CHEM 131 - Chm Concepts, Syst, Pract I</td>
<td>0</td>
<td>Eligible to Enroll</td>
</tr>
<tr>
<td></td>
<td>Mechanical Engineering B.S. Technical Elective Course</td>
<td>ME 108 - Engin &amp; Architect Heritage</td>
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<td>Eligible to Enroll</td>
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<tr>
<td></td>
<td>Primary Writing Requirement</td>
<td>WRTG 105 - Reason &amp; Writing In The College</td>
<td>4</td>
<td>Eligible to Enroll</td>
</tr>
</tbody>
</table>

**Done**
Advisor Inbox Notification

- View Inbox to review student’s plan
Communicating with Students

- **Approve or Send Back the plan**

  ![Academic Plan Event](image)

  **Details to Review**
  
  **4 items**

<table>
<thead>
<tr>
<th>Academic Period</th>
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<tr>
<td></td>
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<td>WRTG 105 - Reason &amp; Writing In The College</td>
<td>4</td>
<td>Eligible to Enroll</td>
</tr>
</tbody>
</table>

View Comments (1)

- **Sean Hanna on behalf of**

[Options: Approve, Send Back, Deny, Cancel]
Creating a Schedule (to come)

- Designing a schedule from a plan

![Design Schedule from Plan](image)

![Add Course to Schedule](image)

Title: Chm Concepts, Syst, Pract I

Academic Level: Undergraduate

Course Owner: Chemistry

Units: 0 - 5 Semester Units

Description: (5 credits) This is an introduction to the concepts of chemistry for science and engineering students, health professions students, and as a science course for students of the humanities and social sciences. Properties of chemical systems are discussed from a macroscopic and molecular perspective with examples developed from a wide range of disciplines. The topics covered include stoichiometry, atoms and molecules, properties of gases, thermochemistry, chemical equilibrium, acids and bases, solubility equilibria, and oxidation-reduction reactions. In addition to lectures, there is a weekly 75 min. workshop. Also, a 50 min. lab lecture and a 3-hour laboratory meet on alternate weeks. You must also register for the lab lecture and corresponding laboratory (Lab Lecture A) students also sign up for a Lab A section before the start of the semester. Workshops are offered at multiple times during the week and assigned during the first week of classes. Lab fee will be billed. Uses T/Th 8-9:30am common exam time.

Academic Period Type: Fall, Spring, Summer

Student Schedule: Schedule 1
Creating a Schedule (to come)

- Find Course for Schedule

![Find Course for Schedule](image)

**Current Search**

- **Academic Level**
  - Undergraduate (1)

- **Instructional Formats**
  - Recitation (1)
  - Lecture (1)
  - Laboratory (1)
  - Workshop (1)

**1 Result**

- CHEM 131 - Chm Concpts, Syst, Pract I
Creating a Schedule (to come)

- Adding Course to Schedule
Next Steps

- 5 minute survey sent to all registrants
- Next Demo Days, February 21
  - Agenda: Onboarding Updates in UR Student
  - Communicated on the UR Student website
- Previous Recorded Demo Days on UR Student website
Questions
Appendix
Project Basics
Project Overview – Phase 1 Timeline

- **Prototype blockers delivered in WD31**
- **Prototype blockers delivered in Dec. release**
- **Prototype blockers delivered in WD 32 (if within scope)**

**Phase 1 Timeline**

- **July '18**: 11/12/2018, 11/19/2018, 11/26/2018
- **January '19**: 1/14/2019, 1/21/2019, 1/28/2019
- **February '19**: 2/14/2019, 2/21/2019, 2/28/2019

**Key Events**

- **Kickoff Build E2E**
- **End-to-End Testing**
- **DIL Tenant Build**
- **DIL Testing**
- **Cutover Window**
- **Stabilization**
- **Go-live**
- **Course Freeze**
University Involvement

The project team includes membership from all schools with our Special Interest Groups (SIGs). Participation of SIG members is integral to the success of the program; membership is intended to be part-time.

SIG Members Contributions to include:

- Input into common business practices
- Input into system configuration
- Business requirements’ definition
- Identification of necessary data for conversion
- Validation of converted data
- Creation of test cases
- Execution of user testing
- Serving as a project champion

Advising SIG
Faculty SIG
Student Records & Registration SIG
Student Finance SIG
Institutional Research & Reporting SIG
Information Technology SIG
Prepare for UR Student Changes

The UR Student implementation will affect all Faculty, Students and related Staff

- **Project Website** ([http://www.rochester.edu/urstudent/](http://www.rochester.edu/urstudent/))
  - News – Stay in the know on project announcements and system demonstrations, Subscribe for updates
  - SIG menu – SIG participants detailed
  - Contact menu – send a question to the UR Student project team
UR Student Terms and Interface
UR Student Terminology

- **Academic Level** Refers to Division.
  - This includes division 1, 2 or 3 in SIS (UG, Grad, Med). There are many more levels in UR Student to assist with administration of programs.

- **Academic Periods**
  - Refers to Term/Semester/Quarter. These are dynamic dates.

- **Academic Units**
  - Refers to Schools/Colleges/Departments.

- **Cohorts**
  - Cohorts are valuable when the purpose is to INTERACT with and/or TRANSACT on groups of students (otherwise a custom report may be a good choice). They are based on the Academic Record and recorded by academic period.
    - Multi-Lifecycle Students will have multiple academic records in UR Student (this allows us to calculate different GPA’s for undergraduate v. graduate academic career at UR).

- **Credential**
  - Degree.

- **Dashboard**
  - A collection of reports tailored to the user or role.
UR Student Terminology

- **Eligibility Rules**
  - System based guardrails to enforce policies

- **Enrollment**
  - Registration

- **Faceted Search**
  - A search where the end user has the ability to identify particular criteria for a population.

- **Onboarding**
  - A targeted communications for new and returning students to ensure that tasks and other necessary documentation is completed (FERPA, Financial Responsibility Agreement, etc.)

- **Programs of Study**
  - Includes Certificates, Majors, Minors, Cluster

- **Tenant**
  - An instance or system environment of UR Student (Workday) where project design and testing work is done. There are several tenants the project team uses for Conversions, Configuration, Integrations. etc.. This will combine into a production build for go live.
UR Student Interface Terminology

- **Home (University of Rochester Logo)**
  - Will always navigate you back to the landing page

- **Inbox (Envelope)**
  - Contains all activity that is required of you

- **Notifications (Bell)**
  - Displays notifications regarding business processes and rule-based alerts

- **Profile Page (Cloud or Your Photo)**
  - Opens all sections available from the Home page. You can configure your personal setting here as well.

- **Ellipses (Twinkie, Related Action)**
  - Displays the related actions menu for an object (available only if the user has permission to perform additional actions on that object)

- **Search Bar (Magnifying Glass)**
  - Can type three letters of a given word (or the whole word) to receive a response from the system

- **Applications (Picture Icons in the middle of the page)**
  - Workday calls these widgets and they can take you to functional areas, reports, or dashboards

- **Categories (within the search function)**
  - Are the different areas within Workday such as Banking, Payroll, People, Reporting, Student, etc.

- **Student Profile**
  - Includes the student’s personal information, registration, billing, financial aid, contact information, etc. in one convenient place

- **Functional Areas**
  - Tabs on the student profile for Academics, Student Financials, Financial Aid, etc.

- **Workday App (for Mobile)**
  - Can be downloaded from the App Store to use on a Droid, iPhone, or iPad
UR Student - Landing Page

Welcome, (Your Name Here)

Inbox

Notifications

Profile

Home Icon

Search Bar

Application Card with Worklets

Inbox

Image Role: Project Team Member (high access/security)
UR Student - Mobile Student View

Personalized Cards

Navigation bar; Home | Inbox | Notifications | Apps (bubbles indicate new items)

Profile or Search Icon (iPhone/Android)

Image Role: Student (student security)