



Banner CPoS with Degree Works Training Agenda

Session Logistics	Banner CPoS with Degree Works Training
Session Dates	February 19-21 (Wednesday – Friday), 2020
Location	University of St. Thomas – St. Paul campus
Participants	TBD
Facilitators	Strata Information Group - Senior Consultant, Degree Works
Session Summary	The training will address configuration and functional training relating to the Courses in Program of Study (CPoS) Banner functionality integrated with Degree Works. The sessions will focus on Degree Works and Banner configuration/set up, review of testing strategies and cases for testing, reviewing Banner output. During the discussions, changes may be required to Degree Works scribe blocks, Surecode UCX tables, System Settings, and Shep security groups.

WEDNESDAY	February 19, 2020
9:00 – Noon	CPoS Basics <ul style="list-style-type: none">• CPoS Overview• Why is CPoS important?• Cultural Impact of CPoS<ul style="list-style-type: none">○ CPoS is not just a Financial Aid process
Noon - 1:00 pm	Lunch
1:00 – 2:30 pm	CPoS and Degree Works/CAPP <ul style="list-style-type: none">• General Business Process Implications<ul style="list-style-type: none">○ Allowing for Change of Major○ Registration Business Process/Timeline○ Disbursement Timeline○ CPoS System-wide Awareness
2:30 – 4:30 pm	Roundtable Discussion of CPoS <ul style="list-style-type: none">• CPoS Discussion for Attendees

THURSDAY	February 20, 2020
9:00 – Noon	CPoS Setup <ul style="list-style-type: none">• Banner Financial Aid form set up review<ul style="list-style-type: none">○ RORENRR Enrollment Rules – Add CPoS rule code○ RFRMGMT Fund Management Enrollment Rule○ ROAINST defines enrollment rules and limits○ RORMPRM Misc Parameters Term to indicate integration with CPoS



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- Banner Student Form Set Up
 - STVREST External API Information – Define “CPOS” code
 - SOAREST External API Connection Information
 - SFACPSC – Course Program of Study Control form
 - GORRSQL Definition of business rules for identifying ESL, Remedial, and Count for Aid courses
- CAPP Forms Set Up

Noon - 1:00 pm

Lunch

1:00 – 3:00 pm

Communication plan for CPoS (Degree Works or CAPP)

- Making sure students, advisors, and staff are aware of courses not counting for Financial Aid
- Discussion of what schools are doing to get information out to students about CPoS

3:00 – 4:30 pm

Roundtable Discussion of CPoS

FRIDAY

February 21, 2020

9:00 – Noon

Degree Works Audit Setup and Scribing Implications

- Degree Works CPoS set up
 - Shepentry User “WHATIFAPI” Configuration
 - CFG020 BANNER and DAP14 Configuration
 - Shepentry System Settings
- Discussion of Degree Works scribing and localization considerations to support CPoS functionality:
 - Scribing considerations
 - Header Blocks
 - Elective Credit considerations
 - Sharing Policies
 - CPoS Localizations

Noon - 1:00 pm

Lunch

1:00 – 3:00 pm

Roundtable Discussion