myProgress

Thesis Graduate Programs

Administrator User Guide

Version 2

McGill Graduate and Postdoctoral Studies
MyProgress Thesis Graduate Programs Administrator User Guide

Welcome to the myProgress Administrator User Guide for Thesis Graduate Programs. myProgress is the web-based tool that supports graduate students’ progress towards their degree completion. This guide provides the information required to track and monitor important academic and research milestones, making it easy to support your graduate students as they progress towards degree completion.

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INTRODUCTION TO MYPROGRESS

myProgress is McGill University’s online tool for monitoring graduate students’ academic progress toward degree completion (see http://mcgill.ca/gradapplicants/programs for a complete list of graduate programs).

myProgress highlights include:

- The ability for students, supervisors, and unit administrators to monitor progress towards the degree together.
- A degree audit worksheet that displays the requirements for individual student program(s).
- A clear indication of which degree requirements require completion.
- Functionality to initiate, approve, and track exceptions to a student’s program requirements, such as course exemptions, course substitutions, and transfer credits.
- The ability to update non-course milestones

Please note that:

- myProgress is not an official transcript nor is it an official evaluation/confirmation of the completion of a graduate program.
- Confirmation of graduation requirements are always subject to department, faculty and university approval.

myProgress is currently available for graduate students registered in Master’s and PhD programs as of Fall 2017.
GETTING STARTED

This section explains how to login and start using myProgress.

LOGIN TO MYPROGRESS

To access myProgress, enter the URL: https://nimbus-ssl.mcgill.ca/gm/

This will direct you to the following login page. Enter your McGill Username and Password.

Once you login, you will be brought to the myProgress Hub.
There are a number of options located on this landing page. Below is a brief description of each feature.

### Welcome to the myProgress Hub

Below you will find links to the tools used to support and manage the myProgress system.

<table>
<thead>
<tr>
<th>myProgress Feature</th>
<th>What Can I Do?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Program Milestones</td>
<td>See a list of default milestones for your graduate programs</td>
</tr>
<tr>
<td>Student Milestones</td>
<td>Update individual student milestones (ie. Progress Tracking meeting completion)</td>
</tr>
<tr>
<td>Degree Works Advising</td>
<td>See the student worksheet and degree audit. Also perform course exceptions</td>
</tr>
<tr>
<td>Graduate Supervisor Assignment</td>
<td>Assign graduate supervisor and co-supervisor</td>
</tr>
<tr>
<td>Graduate Committee Assignment</td>
<td>Assign members to the students graduate committee</td>
</tr>
<tr>
<td>Graduate Milestone Reports</td>
<td>Access a variety of reports for all your students</td>
</tr>
<tr>
<td>D2 Documentum</td>
<td>View and manage student milestone documents</td>
</tr>
</tbody>
</table>
**Program Milestones** lists all of the default non-course milestones for your programs and their due dates. To access **Program Milestones**, select “**Program Milestones**.”

The following search box will appear:
Enter your search criteria by using the options available in the following drop down menus: Term, Degree, Banner Program Name, the Major, and if applicable the Concentration and PhD Entry Year.

Click on “Display” and the default Program Milestones will appear
Go back to the myProgress Hub by clicking on the Home icon at the top of the page.
To access the student worksheet and to perform course exceptions, select **Degree Works Advising**.

Clicking on **Degree Works Advising** will take you directly to the **Degree Works Worksheet** page.
**NAVIGATION BAR**

The navigation bar at the top of the page provides you with links to a Help menu, Minerva, McGill’s eCalendar, Print and Log Out options.

<table>
<thead>
<tr>
<th>HELP:</th>
<th>Links directly to the McGill GPS website</th>
</tr>
</thead>
<tbody>
<tr>
<td>MINERVA:</td>
<td>Links directly to the Minerva main page (without having to login separately)</td>
</tr>
<tr>
<td>eCALENDAR:</td>
<td>eCalendar main page</td>
</tr>
<tr>
<td>PRINT:</td>
<td>Allows you to print the current page</td>
</tr>
<tr>
<td>LOG OUT:</td>
<td>Click here to logout of Degree Works</td>
</tr>
</tbody>
</table>

**WORKSHEET TOOLBAR**

- **FIND:** If the student ID number is unknown, use the Find button to search for a student. You can also pull a list of all your students using the Find button
- **STUDENT ID:** Enter a student’s McGill ID number to bring up their Worksheet
- **NAME:** Displays the name of a student (enrolled student names appear in the drop down list)
- **DEGREE:** Displays student’s current degree
- **MAJOR:** Displays student’s degree of study
- **LAST AUDIT:** Displays the last date an audit was performed for the selected student
- **LAST REFRESH:** Displays the last date and time the Worksheet was refreshed

**Dynamic Refresh:** Allows you to instantly refresh the audit data

**Notes:** Allows you to leave a predetermined note from a picklist, or create a specific note for a student’s file.
PERFORMING AN AUDIT WHEN THE MCGILL STUDENT ID IS KNOWN

Enter the McGill student ID into the Student ID box and press the “Enter” key on your keyboard to generate the Worksheet.

PERFORMING AN AUDIT WHEN THE MCGILL STUDENT ID IS UNKNOWN

If the student ID is unknown or if you are searching for a group of students based on a certain criteria, use the Find button.

Enter your search criteria by using the provided filters: Degree, Catalogue Term, Major, Minor, etc.

Click Search to generate all students within your unit.
A list of all your students (with the search parameters you have indicated) will appear. Select Check All to have access to the Worksheets for all students in the search. Click OK to generate the Worksheets for the selected student(s) listed in the results.

You will be returned to the Degree Works page.

To switch between students from a filtered list you can use the arrows, or the drop down box in the Name field at the top of page.
REFRESHING A STUDENT WORKSHEET

myProgress automatically refreshes Student information every night. However, if you would like an immediate refresh of the information contained in the Worksheet, you are able to do so.

Click on the Dynamic Refresh button at the top of the page to update the student information that entered since the last automatic refresh.

Next click Process New to generate a new Worksheet. The Last Refresh window will update automatically to the current date and time.
As an administrator, you can toggle between four tabs: Worksheets, Notes and Exceptions.

WORKSHEETS TAB

You can access three views from the drop-down menu on the right of the “Worksheets” tab: Student View, Graduation Checklist, and Registration Checklist.

Each audit report displays specific information about students and their progress towards degree completion.
STUDENT VIEW

LEGEND BLOCK

The legend contains all symbols that are important for understanding the Degree Works Worksheet.

- **Complete**: This symbol appears beside all completed requirements. The row will display the course(s) that fulfilled the requirement along with the grade, credit count, and term in which the course was taken.

- **Not Complete** - This symbol appears beside all requirements that have yet to be completed. The row, highlighted in red, will indicate the course(s) required in accordance with graduation requirements for your respective program.

Once all courses within a category are completed, the primary category will also show a green check mark (e.g., see “Categories A & B Required Tutorials” in the screenshot below).
COURSE LINKS BLOCK

When a requirement is not yet completed, the worksheet will display the course(s) required. These courses are hyperlinked and display class schedule information when clicked.

- **In-Progress** - This symbol will appear for requirements where the classes needed to fulfill the requirement are in progress or registered for a future term.

The row will be highlighted light blue and the grade section for the course will display IP (In Progress).

- **Prerequisite Courses** - A course number with a * symbol indicates a prerequisite required for the course.

---

DEGREE WORKS WILDCARD (@)

The “@“ symbol can be used to represent all course numbers. When a course prefix is followed by the @ symbol (e.g., ENGL@), any course number for that prefix can be used to fulfill the requirement.

In the example below, the requirements fulfilled could be by any 500, 600 or 700 ENGL (English) courses in consultation with the supervisor(s).
**DEGREE PROGRESSION MILESTONES BLOCK**

As with the degree audit block, once a milestone is complete, a green checkmark will indicate completion. A ‘not complete’ empty red box indicates unmet milestones. Once all milestones are completed, the primary category (i.e., “Degree Progression Milestones”) will also indicate completion.

<table>
<thead>
<tr>
<th>Degree Progression Milestones</th>
<th>Catalog Term: FALL 2017</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ph.D. Supervisory Committee</td>
<td>DUE: 31-DEC-17 Status: Complete 06-JUN-18</td>
</tr>
<tr>
<td>Ph.D. Study Plan</td>
<td>DUE: 31-DEC-17 Status: Complete 06-JUN-18</td>
</tr>
<tr>
<td>Ph.D. Comprehensive Examination</td>
<td>Required upon successful completion of the comprehensive exam.</td>
</tr>
<tr>
<td>PROGRESS TRACKING</td>
<td>Required upon progress tracking toward the degree. Each milestone is only met when the student's progress has been judged satisfactory. If necessary, additional progress review milestones may be added to the student's requirements until degree completion.</td>
</tr>
<tr>
<td>Ph.D. 3 Progress Tracking</td>
<td>DUE: 31-DEC-17 Status: Complete 06-JUN-18</td>
</tr>
<tr>
<td>Ph.D. 4 Progress Tracking</td>
<td>DUE: 31-DEC-17 Status: Complete 06-JUN-18</td>
</tr>
<tr>
<td>Ph.D. 5 Progress Tracking</td>
<td>DUE: 31-DEC-17 Status: Complete 06-JUN-18</td>
</tr>
<tr>
<td>Ph.D. 6 Progress Tracking</td>
<td>DUE: 31-DEC-17 Status: Complete 06-JUN-18</td>
</tr>
<tr>
<td>Ph.D. Thesis</td>
<td>DUE: 31-DEC-17 Status: Complete 06-JUN-18</td>
</tr>
</tbody>
</table>

**PLANNED MILESTONES BLOCK**

Required milestones listed in this block will display due dates and status required dates. Once a milestone is met, it will move to the block above (i.e., Degree Progression Milestones), and will no longer appear in the Planned Milestone block.

<table>
<thead>
<tr>
<th>Planned Milestones</th>
<th>Due Date</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>PhD2 Progress Tracking</td>
<td>15-NOV-18</td>
<td>Required</td>
</tr>
<tr>
<td>PhD Supervisory Committee</td>
<td>21-DEC-17</td>
<td>Required</td>
</tr>
<tr>
<td>PhD Study Plan</td>
<td>31-DEC-17</td>
<td>Required</td>
</tr>
<tr>
<td>PhD Comprehensive Examination</td>
<td>31-DEC-18</td>
<td>Required</td>
</tr>
<tr>
<td>PhD Progress Tracking</td>
<td>15-NOV-19</td>
<td>Required</td>
</tr>
<tr>
<td>PhD 1st Language</td>
<td>31-AUG-20</td>
<td>Required</td>
</tr>
<tr>
<td>PhD 2nd Language</td>
<td>31-AUG-20</td>
<td>Required</td>
</tr>
<tr>
<td>PhD Oral Examination</td>
<td>15-NOV-21</td>
<td>Required</td>
</tr>
<tr>
<td>PhD Thesis (Final)</td>
<td>15-DEC-22</td>
<td>Required</td>
</tr>
</tbody>
</table>

**COURSES NOT APPLICABLE TO PROGRAM BLOCK**

This block displays all completed courses not currently used to fulfill a program requirement as indicated within the Worksheet.

<table>
<thead>
<tr>
<th>Courses Not Applicable to Program</th>
<th>A 4</th>
<th>Fall 2016</th>
</tr>
</thead>
<tbody>
<tr>
<td>MATH 517 Advanced Probability Theory 1</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
INSUFFICIENT DUE TO GRADES AND/OR REPEATS BLOCK

This block displays incomplete courses, courses withdrawn from, any course that did not meet a specific grade requirement, and any course not passed.

*NR - No grade reported by the instructor (recorded by the Registrar)

For a complete list of grades that can appear on a transcript, click here.

IN-PROGRESS BLOCK

This block displays all courses registered for and/or in progress.

GRADUATION CHECKLIST

To change views from the Student View to Graduation Checklist, select the desired view from the dropdown menu, within the Format window, and click the View button, as seen below. This will generate the Graduation Checklist view.
The Graduation Checklist displays a simplified summary of requirements for each area of the Worksheet.
REGISTRATION CHECKLIST

The Registration Checklist displays a simplified summary of unfulfilled program requirements.

NOTES TAB

As an administrator, you can create notes within Degree Works.

All notes created in Degree Works can be viewed by students, supervisors and administrators.

Click on the Notes tab to view or add a note.

The default view within notes is View Notes.
To add a note, click on the **Add Note** menu item. You can create an original note or choose from one of the picklist.

Save the note before leaving the page.

Notes created will be contained within the **View Notes** section in the **Notes** tab.

Notes will also appear at the bottom of the Worksheet, within a “Notes” block.
EXCEPTIONS TAB

The tab to the right of the Notes tab is the Exceptions tab.

Exceptions cannot be made until a course is in-progress or has already been completed. Only Graduate Program Directors and Coordinators have access to the Exceptions tab.

Both Graduate and Postdoctoral Studies and Enrolment Services have the ability to monitor exceptions.

EXCEPTION TYPES

There are three (3) types of exceptions that can be applied to a student’s record: Substitute, Also Allow, and Apply Here.

<table>
<thead>
<tr>
<th>Exception Type</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Substitute</td>
<td>Used to replace one course with another unit-approved course.</td>
</tr>
<tr>
<td>Also Allow</td>
<td>Used when a course rule needs to allow more choices. Also Allow exceptions are made after the student has already taken the course or the course is currently in-progress.</td>
</tr>
<tr>
<td>Apply Here</td>
<td>Used when a course should be applied to a specific course rule. Apply Here exceptions are made to allow the student to use a non-standard course to satisfy a requirement.</td>
</tr>
</tbody>
</table>
To select an Exception type, choose from the picklist and click the Load button.

**Exceptions**

<table>
<thead>
<tr>
<th>Exception Types</th>
<th>Substitute</th>
<th>Load</th>
</tr>
</thead>
</table>

**Substitute one class for another**

<table>
<thead>
<tr>
<th>Subject</th>
<th>Number</th>
<th>Subject</th>
<th>Number</th>
</tr>
</thead>
</table>

**Description**

Apply exceptions to records

Next, find the requirement in the audit. When you have located the course, click inside the radio button to select the courses or requirement.
Once you have entered the information, click on **Add Exception**.

Click the **OK** button if you do not want to add a description (a description will automatically be generated). The comments you make will be visible on the Worksheet.

You should receive this message: “Your exception has been added to the database successfully.” Click **OK**.

Click the **Run New Audit** button on the far right.

To view the changes immediately, remember to select the **Dynamic Refresh** button and **Process New** to refresh the Worksheet information.

The Exception will be added at the bottom of the Worksheet in a new **Exceptions** block.
STUDENT MILESTONES

To update or record a change to a student milestone in myProgress, follow the steps below:

Select Student Milestones from the myProgress Hub.

Enter the McGill Student ID number

The Student’s milestones will appear. Click on Status for the milestone you would like to update. A dropdown menu will offer you a few choices. Choose the status that reflects the milestone change.
TO RECORD SUCCESSFUL MILESTONE COMPLETION

The **Status Date** is the date the **Milestone Status** has changed. It will default to today’s date, but you can easily input a different date should you desire.

Click on **Save** at the bottom the page.
A green check mark will appear in the “Completed” column only when the **Complete** or **Satisfactory** status is selected.

**VIEW UPDATED STUDENT MILESTONES IN STUDENT WORKSHEET**

The change in Student Milestone status can be viewed on the Student Worksheet right away. To do so, select the **Home** icon at the top of the page to return to the myProgress Hub.

Select **Degree Works Advising** from the main page.
Click on the Dynamic Refresh button at the top of the page to update the student information that entered since the last automatic refresh (1).

Then click Process New to generate a new Worksheet (2). The Last Refresh window will update automatically to the current date and time.

The updated Student Milestones will appear at the bottom of the Worksheet with a green checkmark in the Degree Progression Milestones block.

TO RECORD UNSUCCESSFUL MILESTONE COMPLETION

To record if a Milestone Status has not been successfully completed, select the appropriate Status from the dropdown menu (either Incomplete or Unsatisfactory).
Click on **Save** at the bottom of the page. A green check mark will NOT appear in the “Completed” box.

Next, input the new Milestone activity that must be completed to satisfy the Milestone. Click on the + symbol at the bottom of the screen.

This will open a dropdown menu of Milestones. Select the Milestone activity the student must complete to successfully achieve the Milestone.
Let’s use an example: if a student is deemed to have unsatisfactory progress in their PhD2 Progress Tracking meeting, select **PhD2 Progress Tracking** from the list and enter the new **Complete by Date**. In our example, the original PhD2 Progress Meeting was attempted on Dec 15 2017. Since the meeting was deemed “Unsatisfactory,” the student was given 6 months to redo the PhD2 Progress Tracking meeting. The new Complete by Date is June 15, 2018.

A pop up window will ask you to verify you have milestones of the same type.

Select **Yes**.

Your changes will be saved, and the two milestones will appear with the new statuses and dates.
Once again, the Student Worksheet can be updated immediately by going back to the myProgress Hub landing page, selecting Degree Works Advising and refreshing the Worksheet as described on page 29.
GRADUATE SUPERVISOR ASSIGNMENT

The Graduate Supervisor Assignment form is used to manage and track graduate students’ supervisors. Please refer to McGill University Regulations for the rules governing supervisor eligibility.

To add a Graduate Supervisor to a Student Record, select Graduate Supervisor Assignment in the myProgress Hub.

You will immediately be brought to a search form:

- This form allows you to search for any person with a McGill ID. Type the McGill ID if available, and click on submit to find the record.
- If you don't have the McGill ID, perform a search using any of the other fields, adding wildcards (% , _) to narrow your search.
- Please note that wildcards are only allowed on the Last Name, First Name and Middle Name fields.
- When using the birth date as part of your search, make sure to use the DD-MON-YYYY format.

Enter Student search criteria (McGill ID or Name) and click the Submit button.
Click on the student’s McGill ID.

The following page will appear:

To add a new supervisor click on the **Add New Supervisor** link.

The following search box will appear.

Enter the supervisor search criteria (**McGill ID** or **Name**)

Click the **Search** button
Click on the faculty member’s McGill ID.

**Note:** If the desired faculty member is not found, please submit your supervisor change request to the Management of Academic Records, Enrolment Services using the **Request for a Graduate Student Record Change** form.

The new supervisor will now appear on the supervisor list.
From the **Type** pick list, select the supervisor type.

Check the **Primary** button to flag the supervisor as the Primary Supervisor (**Note:** Only one active supervisor can be designated as Primary).

Click the **Save** button. You are done!

**Note:**

To **add an additional supervisor** for the same student, select the **Add New Supervisor** above the **Save** and **Reset** buttons and repeat the steps on page 34 and 35.

To **remove a supervisor**, select the **Remove** link at the end of the row

<table>
<thead>
<tr>
<th>Primary</th>
<th>Effective Terms</th>
<th>Remove</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Summer 2018 - The End of Time</td>
<td>Remove</td>
</tr>
<tr>
<td></td>
<td>Summer 2018 -</td>
<td>Remove</td>
</tr>
</tbody>
</table>

To **update a record for a different student**, select **Change Student** link at the bottom of the screen
VIEWING SUPERVISOR INFORMATION ON THE STUDENT WORKSHEET

The Student Worksheet can be updated immediately by going back to the myProgress Hub landing page and selecting Degree Works Advising.

The supervisor information on a Student Worksheet is displayed in the gray information block.
To display the supervisor information you have just entered in Graduate Supervisor Management, click the **Dynamic Refresh** button, and then click the **Process New** button.

The new supervisor information will now be updated.
GRADUATE COMMITTEE MANAGEMENT

The Graduate Committee Membership Management form is used to create students’ graduate committees and manage committee membership.

Please refer to McGill University Regulations for the rules governing supervisory committee membership.

To add a Graduate Committee and Graduate Committee Members to a Student Record, select Graduate Committee Management in the myProgress Hub.

You will be brought to the following search form.
Enter Student search criteria (McGill ID or Name) and click the Submit button

Click on the student’s McGill ID

The following screen will now be available to you.

Graduate Committee Management

- To add initial committee, select a committee type from picklist in the Type field, enter effective date in the Date Initiated field as MM/DD/YYYY, and click Save.
- To add or edit committee members, click hyperlink in the Members field.
- To add or delete committee comments, click hyperlink in the Comments field.

Student Identification
Student Name: Student, Test (Change student)
Student ID: 260694748

Student Curricula for Summer 2018
Primary:
Secondary:

Student Committees
<table>
<thead>
<tr>
<th>Type</th>
<th>Date Initiated</th>
<th>Members</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
From the Type picklist, select the **Committee** you wish to create.

For a PhD Supervisory Committee, the Committee Type would be **Supervisory Committee Doctoral**.

Enter the **Date** the committee was formed with the use of the calendar feature.

Click the **Save** button. You are now ready to add the committee members.
To add a member, Click on 0 Member(s). A Committee Members section will now appear under the type of Committee.

Enter the faculty member’s McGill ID, or click on the Search for faculty link.

This will open a Committee Member Search window. Enter the McGill ID or the Name of the faculty member and press Search.

To search for McGill faculty and external members (non-McGill Faculty) with a McGill ID:

- Enter search criteria in each fields and click Search.
- NOTE: Wildcards (%) can only be used with the Last Name and First Name fields.
- To search for external members (non-McGill Faculty), uncheck Faculty Member.
- To search for active external members by email, a valid email address (e.g. name@mail.com) must be entered.

To create a McGill ID for a new external member (non-McGill Faculty) not found in the Search:

- Click the Create a McGill ID for an external member link below, enter the person’s name and email address (and phone number if available), and click Submit.
- DO NOT use this form to create an ID for an external member who already has a McGill ID.

Click the Create a McGill ID for an external member link below to create a Banner ID for a new external member (non-McGill Faculty) not found in the Search.

Create a McGill ID for an external member
The search form will return a list of faculty members with existing McGill ID numbers. Click on the McGill ID number of the faculty member you wish to select.

The faculty member will now be added to the Committee Members list.

Select the Status type
Select the member’s **Role** on the committee

Enter the **From** date the member’s status starts. Enter the **To** date the member’s status ends. You can also leave the dates to the default dates (**From** today’s date, **To** the end of time).

Click the **Save** button. The number of members will change from **0 member(s)** to **1 member(s)**.

Click **+** to add another committee member.
ADDING A COMMITTEE MEMBER EXTERNAL TO MCGILL UNIVERSITY

Should your student have members on their committee who are external to McGill University, you can create a new McGill ID for them. The purpose of the McGill ID in this case is to include them on the list of committee members. Creating a new McGill ID will not grant the external member any McGill privileges.

To add an external committee member to a committee, click on the **Search for Faculty** link on the Graduate Committee Management screen.

Once the Faculty Search form opens, click on the **Create a McGill ID for an external member** link.
The following **Create External Committee Member** window will appear. Enter the external member’s **First Name**, **Last Name** and **Email Address**.

**Create External Committee Member**

To create a McGill ID for a new external member (non-McGill Faculty) not found in the Search:

- Enter the person’s name and email address (and phone number if available), and click Submit.
- **DO NOT** use this form to create an ID for an external member who already has a McGill ID.

- indicates a required field.

**Personal Information**

| Title: | Select...  
|-------|------------
| **First Name:** |  
| **Middle Name:** |  
| **Last Name:** |  
| **Email:** |  

Please enter a **Phone Number**. All data should be numeric, no hyphens (-), text or special characters. Either complete **Area Code** and **Phone Number** for North American numbers, or use the **International Phone Number** field for other countries. Extensions for either North American or International should be entered in **Extension** field.

**Telephone:**

<table>
<thead>
<tr>
<th>Area Code</th>
<th>Phone Number</th>
<th>International Phone Number</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>North American:</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Extension:</strong></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Submit**

Click on the **Submit** button. A new McGill ID will be created.

**Create External Committee Member**

- A McGill ID was created for the external member below. Click Add ID # to committee.

**McGill ID** 260879371

**Summary**

| **Title:** |  
| **First Name:** | Test  
| **Middle Name:** |  
| **Last Name:** | Personc  
| **Email:** | test.personc@gmail.com  
| **Telephone:** |  

**The committee member will receive myProgress notifications for relevant milestones at this email address**

Click on the **McGill ID link (in blue)**.
The external member will be added to the Committee Members list.

Select the **Status** and the **Role** for the external member

Enter the date the external member was added (**From**) and the date the member’s status ends (**To**). You can also leave the default dates should you wish.

Press **Save**. The external member is now added to the committee.

Click  to add another committee member.
VIEWING COMMITTEE MEMBER INFORMATION ON THE STUDENT WORKSHEET

The Student Worksheet can display the newly added committee members.

Go to the myProgress Hub landing page and select Degree Works Advising.

The Supervisory committee information is located in the gray information block of the Student Worksheet. Click on the View committee information link.
This will open a window that will display the members of the committee.

<table>
<thead>
<tr>
<th>Degree</th>
<th>Major</th>
<th>Committee</th>
<th>Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>PHD</td>
<td>MIM4</td>
<td>DSUPR1</td>
<td>Cousineau, B., Dr (Member)</td>
</tr>
<tr>
<td>PHD</td>
<td>MIM4</td>
<td>DSUPR1</td>
<td>Del Giorgio, P., Dr (Member)</td>
</tr>
</tbody>
</table>
GRADUATE MILESTONE REPORTS

MyProgress offers a series of reports and data related to students in your graduate programs. This includes information such as overdue or upcoming milestones, supervisory information, registration status and other facts. The data can be easily exported to Excel or another spreadsheet software.

Reports can be filtered by Department, Term, Program, Major and Concentration. In addition to these main filters, some reports have other features specific to the report. Select the criteria you wish to view.

To access Graduate Milestone Reports, select Graduate Milestone Reports from the myProgress Hub.

If prompted to do so, re-enter your McGill Username and Password.
You will be brought to the following screen that offers a number of report selections.

To get a complete description of each report, click on “tiles” (top right) and select “list”. Select the report you wish to view.

List of current reports:

<table>
<thead>
<tr>
<th>Report Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>GS001-List of all active graduate students by program</td>
</tr>
<tr>
<td>GS002-List of all active graduate students by program with details</td>
</tr>
<tr>
<td>GS003-List of student degree milestones by term</td>
</tr>
<tr>
<td>GS004-List of graduate students and their degree milestones</td>
</tr>
<tr>
<td>GS005-List of registered students in graduate degree thesis programs...</td>
</tr>
<tr>
<td>GS006-List of graduate students committees</td>
</tr>
<tr>
<td>GS007- List of Graduate Program Milestones</td>
</tr>
</tbody>
</table>

**Getting Started**

**Working with the reports**

For each report, the filters are pre-populated based on:

- User access: view your department(s) based on myProgress security access.
- Default values: some filters have set default values, such as term, and most dates. Defaults are set to the current term and current date.
- Cascading filters: the filters are hierarchical so the first filter causes the next filter to only display relevant values. The filters are repopulated (for lower levels) every time a filter selection is changed.
- Data: the filters only display existing data values for that field. The filters will not display values that do not exist in the data, and also use the criteria set in the previous filter selection – see Cascading filters.
Notes:

- Select **View Report** after you make changes to any of the filters to refresh the report.
- You can sort on the columns to focus on specific groups.

You can search for a student by name (last or first name) or ID number in the **Find** field. **Find** can also be used to locate any value in the report columns.

Reports GS001 through GS006 bring you to the Individual Student Information, when you select the **student name** (link).

You can export the results to another file format, e.g. Excel, PowerPoint, PDF or Word by selecting the **Export** drop down menu.
The results will appear in the spreadsheet with the report titles.

Working with Excel

To prepare the report data for creating an Excel pivot table:

Select Yes in the Format for Excel field to export the data in Excel before you select View Report.

Then select the Export drop down menu to export the data to Excel.

The data exported to Excel will appear in a spreadsheet.

In Excel continue to work with the data as needed, e.g. apply filters, modify sort, remove or reorder columns.
Report 1: GS001-List of all active graduate students by program
This report includes all registered, withdrawn and active non-registered students for all graduate programs (thesis and non-thesis) and all terms. Departments can use this report for various reasons such as verification of students’ current registration status or students that have withdrawn from their programs.

Select the criteria you wish to view and select View Report on the far right of the screen.

The data will appear under the search criteria. This example shows a list of active graduate students registered for Winter 2020 for all graduate programs in the Department of Educational & Counselling Psychology.
Report 2: GS002-List of all active graduate students by program with details

This report is a sub-report of report 1 that shows more information on individual students. In addition to the main filters (Department, Term, Program, Major and Concentration), this report allows Departments to filter on students’ curriculum year, curriculum load (i.e. students on leave of absence) as well as their graduation status.

Select the criteria you wish to view and select **View Report** on the far right of the screen.

The data will appear under the search criteria. This example shows a list of active PhD students registered in Thesis Additional Session for the Winter 2020 in the Department of Educational & Counselling Psychology.

### Active Graduate Students in Winter 2020 Term

<table>
<thead>
<tr>
<th>Student Name</th>
<th>Student ID</th>
<th>Program</th>
<th>Department</th>
<th>Major</th>
<th>Concentration</th>
<th>Thesis Program Indicator</th>
<th>Last Register d' Term</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>PhD Counselling Psych</td>
<td>Educational &amp; Counselling Psych</td>
<td>Counselling Psychology</td>
<td>PhD Ed</td>
<td>Y</td>
<td>20001</td>
</tr>
<tr>
<td></td>
<td></td>
<td>PhD Counselling Psych</td>
<td>Educational &amp; Counselling Psych</td>
<td>Counselling Psychology</td>
<td>PhD Ed</td>
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<td></td>
<td></td>
<td>PhD Counselling Psych</td>
<td>Educational &amp; Counselling Psych</td>
<td>Counselling Psychology</td>
<td>PhD Ed</td>
<td>Y</td>
<td>20001</td>
</tr>
<tr>
<td></td>
<td></td>
<td>PhD Educational Psychology</td>
<td>Educational Psychology</td>
<td>Learning Sciences</td>
<td>PhD Ed</td>
<td>Y</td>
<td>20001</td>
</tr>
</tbody>
</table>
The data will appear under the search criteria. Select the **Student Name (link)** to view that student’s detailed information.

The individual student information of the selected student will appear. Select the left arrow at the top middle of the screen to return to the parent report.
Report 3: GS003-List of student degree milestones by term

This report will show a list of graduate students' degree milestones due in a selected term. Departments can use this report to review student milestones due in the previous or current term, or look ahead to milestones coming due in a future term.

Select the criteria you wish to view and select View Report on the far right of the screen.

The data will appear under the search criteria. This example shows a list of students' degree milestones for all the PhD programs in the Department of Educational and Counselling Psychology that are due in the Winter 2020 term.
Report 4: GS004-List of graduate students and their degree milestones

This report will show a list of graduate students and their degree milestones. Departments can use this report to generate a list of all overdue milestones. Report filters allow you to select overdue, or completed, milestones based on your date criteria.

Select the criteria you wish to view and select View Report on the far right of the screen.

The data will appear under the search criteria. This example shows a list of all outstanding student milestones that were due before selected date (March 13, 2020) for all graduate programs in the Department of Educational & Counselling Psychology.
D2 Documentum is used to view and manage required milestone forms, e.g. progress tracking, submitted by students through myProgress.

You will be prompted to re-enter your McGill Username and Password.

Select STUDENT FILES SEARCH workspace.
MANAGE DOCUMENTS SUBMITTED BY STUDENT

Click Public searches

Click Student Files

Click Documents by Status

Select Submitted in the Query Form pop-up window, click Run
A list of Submitted documents will appear in the panel on the right-side. Double-click on the file **Name** you would like to review. The document will open in a new browser window; once verified close the browser window and you will return to the document list.

Right click on the document, then click **Document status** and select the appropriate status (File Document, Reject Document, GPD Sign-off).

**Note:** Use **My last search** to reload the results of your last search. This is a quick way to return to your document list after updating a document status.
TO FILE A DOCUMENT

Confirm the updated document status is correct.

Note: If you select Reject Document in error, right click again and change the status to File Document.

It is VERY important to remember to update the corresponding milestone status in the Student Milestone application as the student will see the updated document status, and milestone status in their myProgress Document Upload application.
TO REJECT A DOCUMENT

Select the **Reason** for rejection from the drop-down list, and add your **comments (optional)** to be included in the email notification to the student. **Click OK**

An email will automatically be sent to the student notifying them of the rejection.

```plaintext
Subject: myProgress: Rejected milestone document for Doctor of Philosophy
Dear [student name]

The following document you submitted on 7/9/2019 3:48:00 PM was rejected for the reason detailed below. Please take the necessary action.

Milestone: PHD4 Progress Tracking
Uploaded file: Progress Tracking report-PHD2-123456789.pdf
Document status: Rejected
Reason: Missing signature(s)
Comments: This box should be used to provide the student with detailed instructions on what they need to do to correct, or provide, for the rejected document.

Student ID: 123456789
Degree: Doctor of Philosophy
Major: Chemistry -T
Concentration:

Thank you,
Sent from the McGill myProgress System
```

Rejected documents will remain available in D2 for 30 days. The system will automatically update the document status to **Obsolete** after 30 days. The document will automatically be deleted after 60 days.
**GPD SIGN-OFF**

Right click on the document, click **Document status**. Select **Signature**, click **OK** in the confirmation pop-up window. (The GPD sign-off option is only available to users with the GPD security role in myProgress.)

![Document Status Menu]

The following screen will be returned showing the document you signed off on with an updated modified date and user.

![Documents Search Result]

Your sign-off will be added to the document properties in D2 Documentum.

Return to the **Search-Student Files** in the left panel to continue reviewing documents.

You can remove your sign-off by selecting **Remove Signature** in the Document Status drop-down list. Your sign-off will automatically be removed from the D2 document properties.
VIEW OR EDIT DOCUMENT PROPERTIES (DETAILS)

To View or edit document details, i.e. milestone program, right click on a student file and click on Properties

UPLOAD/IMPORT A DOCUMENT ON BEHALF OF A STUDENT

Click the Student Files Search workspace, then click Public Searches > Student Files
Click **Import > File**

Click **File...** to open the Import Files dialog box

Click browse icon (…) from the **Files to import** field. Find and select the file from the **Choose files** window, click **Next**
Select **New Student File** in the Creation profile. Available properties will automatically populate with McGill Document. Click **Next**.

Fill out the associated document properties (* indicates a required field)

Enter the student’s **McGill ID**. The student’s first and last name is automatically populated from Banner. (Note: The student’s name cannot be updated in D2). Hit **Tab** on your keyboard. The student’s department, degree, program, and major will automatically populate from Banner. However, you will need to select the appropriate entry if the student has more than one program in Banner.

Select the appropriate **Milestone**. Click **Next**.

The document will be added to D2 with a ‘Submitted’ status. You will need to change the status of the document to ‘Filed’, i.e. click **Document Status** and select **File document**, just as you would with a document submitted by a student.
There may be an initial set up of the **STUDENT FILES SEARCH** workspaces if you don’t see it already. This will be needed in order for you to add, search for and to file and reject graduate milestone documents.

Click on the add workspace button 🌐 to access the **Workspace Gallery**.

Select the “**Search - Student Files**” workspace to add it.

This workspace will be added to your existing workspaces, ready for you to use.
FAQS

Below are some answers to frequently asked questions.

GENERAL FAQS

• What does Degree Works Advising do?
  o Degree Works Advising automatically retrieves graduate student academic records, displays courses and indicates major program milestones in progress or completed according to the graduate program and degree requirements.

• What additional features are available within Degree Works Advising?
  o Degree Works Advising generates an easy-to-read pdf summary of a student’s record and degree audit.

• How current is the information in Degree Works Advising?
  o The information in Degree Works Advising is automatically updated and refreshed every night. Any changes to a student’s record are reflected the following day.
  o If you would like to have an immediate update (e.g. if courses are added or dropped, or grades have been entered), click the “Process New” button and you will see the update right away.

• If all of the boxes are checked, does that mean the student is graduating?
  o Not necessarily. If a student has applied to graduate, Graduate and Postdoctoral Studies (GPS) will complete a final audit after all final grades are submitted to determine eligibility for graduation.
    ▪ Non-thesis Master’s students must apply on Minerva to graduate.
    ▪ Thesis Master’s and PhD students submit their final thesis to GPS through the e-Thesis submission process on Minerva. This triggers their application to graduate.

• What should I do if the information in a Student Worksheet is incorrect?
  o Any errors should be brought to the attention of the Enrolment Services Degree Evaluation team. You can also email myprogress.gps@mcgill.ca to request any changes to Degree Works.

• Can I access Degree Works Advising on a smart phone?
  o No. As with many McGill software applications, Degree Works Advising requires the use of a desktop, laptop or tablet to function.

• Is information on Degree Works Advising secure and confidential?
  o Yes. Degree Works Advising access is through a secured portal. Your login credentials are the same as they are for Minerva.
  o Please note that it is a violation of the Policy on Responsible Use of McGill Information Technology Resources to share login credentials.

COURSE FAQS

• Can course information be viewed in Degree Works Advising?
  o Yes. When you click on a course title, you can view the course description, prerequisites required, and available course sections for the upcoming semester.

• Can a student register for courses in Degree Works Advising?
  o No. Degree Works displays courses a student is in the process of completing or has completed. Course registration continues via Minerva.
• Can I see a student’s grades in Degree Works Advising?
  o Yes. Once grades are entered at the end of each term, or upon completion of other academic milestones (e.g. PhD Comprehensive Examination), grades appear in the grade column. Courses that are currently in progress show "IP" in the grade column.
• Can I see how many courses and program requirements remain for a student to complete their degree?
  o Yes. Look for unchecked boxes to identify which requirements the student has yet to complete.
• Why is there not a check mark next to a requirement a student has already completed?
  o It could be a student has not met the minimum grade for the course.
• Why is a transfer credit or course substitution not showing under the program requirements?
  o Not all transfer courses or course substitutions will appear automatically in a list of major requirements - many require manual entry. Please speak with Enrolment Services to verify courses are appearing correctly.
• If a course is repeated, will this show on the worksheet?
  o Yes.

NON-COURSE REQUIREMENT FAQS

• What are non-course degree requirements?
  o Non-course degree requirements are mandatory milestones a student must complete as part of their graduate degree. myProgress allows you to track students’ completion of the following non-course requirements:
    ▪ Supervisory/Advisory Committee Formation
    ▪ Study Plan
    ▪ Annual Progress Tracking
    ▪ PhD Comprehensive Examination (PhD)
    ▪ Master’s or Doctoral Thesis, as applicable
  o Once a non-course requirement has been completed, you will be able to login to a students Degree Works Student Worksheet and note this requirement is now complete (a green check mark will appear to indicate this new status).
  o While the PhD Comprehensive Examination is a course (typically a course code of XXXX 700 or 701) it will also appear as a non-course degree requirement in Degree Works Advising. Hence, the PhD Comprehensive Exam is tracked twice: as a program requirement with a course code and as a trackable milestone with notification reminders and a due date.
• Where are non-course degree requirements listed on my worksheet?
  o All non-course degree requirements are listed in the “Degree Progression Milestones” section of the Degree Works worksheet.
• When will “Supervisory Committee Approved” show as complete?
  o This milestone will be marked as complete when the committee members are entered in the Graduate Committee Management section of myProgress for the student and the milestone status is changed from “Required” to “Complete” in the Student Milestones section of myProgress after obtaining unit approval.
• What does “Study Plan” refer to?
  o This milestone is the discussion of a student’s initial study plan of their program with their respective department (via the supervisor, committee and/or Graduate Program Director). Once the study plan is reviewed and approved by the department, this milestone should be marked “Complete” in the Student Milestones section of myProgress.
• When will the “Comprehensive Examination” milestone show as complete?
This milestone is met once the student has successfully completed their comprehensive exam(s) and a grade of “P” is entered. The student’s record in Student Milestones should also be updated to “Complete” or “Satisfactory” in order for the milestone to be noted as Complete in Degree Works.

- When will the “Master’s Thesis” milestone show as complete?
  - Once the student submits their final Master’s thesis on Minerva (e-Thesis submission) and it has been approved by the supervisor(s) and Graduate and Postdoctoral Studies, this milestone shows as complete. Please note thesis submission deadlines.

- When will the “Doctoral Thesis” milestone show as complete?
  - After the student successfully passes the Oral Defense, submits their final PhD thesis on Minerva (e-Thesis submission), and the final thesis has been approved by the supervisor(s) and Graduate and Postdoctoral Studies, this milestone shows as complete. Please note thesis submission deadlines.

- What does “Progress Review” refer to in the Milestones section of the worksheet?
  - “Progress Review” refers to the annual research progress tracking meetings required by McGill University. Progress Tracking is mandatory for all doctoral students. Each “Progress Review” milestone is met when the supervisor and supervisory committee have met with the student and evaluated the student’s research progress as satisfactory. If necessary, additional progress review milestones may be added to a student’s requirements until the degree is completed.

- Will I be notified of upcoming planned milestones?
  - All planned milestones contained in myProgress are associated with specific due dates. Graduate Program Coordinators and Administrators will be copied on all email reminders and notifications sent to students in their department regarding upcoming or overdue milestones, and changes to milestone statuses.

**QUESTIONS?**

Please take the time to become familiar with what myProgress can do for you, to help you track and monitor your progress to degree.

For questions on using the myProgress system, email myprogress.gps@mcgill.ca

To report system unavailability or slow response, or problems logging in, Contact the IT Service Desk