Procedures to Access DegreeWorks Crystal Reports

DegreeWorks Application – Curriculum Planning Assistant Reports

The DegreeWorks Application version 7.7.2 provides a series of pre-defined reports through the Curriculum Planning Assistant functionality. The Curriculum Planning Assistant (CPA) reports are generated from data stored in the DGW database. Reports can be generated on students’ audit information such as academic history and progress; degree requirements including courses non applicable towards the degree, and summative data from other DegreeWorks Application functions.

Access to DegreeWorks CPA Crystal Reports

The DegreeWorks CPA standardized reports are created on Crystal Reports XI. CIS will provide access to these reports to colleges on the Central Server through Crystal Developer stored on a Citrix Server.

The set-up for these reports:

- DegreeWorks Coordinator submits the name of individual users who will access the DGW CPA Crystal Reports to the Registrar.
- The DGW Coordinator defines the role of each individual user as Report Manager or Report Developer based on how data will be utilized.
- The Registrar approves user’s access and role.
- The Registrar submits the DGW Crystal Report users name to the CUNY/CIS Information Security team who reviews and approves request.
- CIS creates Citrix Accounts for each user.
- CIS creates a DegreeWorks Citrix Test and Production Account per campus.
- DGW CPA reports will reside in each campus directory (folder).
- College’s ID files required to query data on specific results such as financial aid data will be stored in individual campus folders.

Security Approval Process

All prospective users of Degreeworks CPA Crystal Reports will read and attest to understanding CUNY’s Policy on Acceptable Use of Computer Resources (Computer User Responsibilities) and IT Security Procedures located at security.cuny.edu under Security Policies and Procedures.

The Registrar submits the Degreeworks CPA Crystal Report access request to the CUNY-CIS Information Security Administrator, Beatrice Atobatele, 212-541-0364, Beatrice.atobatele@mail.cuny.edu

Each incumbent user must read and sign the Degreeworks Use & Access Agreement and return it via facsimile (212-541-0379) or attached PDF document in an e-mail to Beatrice Atobatele.

Upon final approval by the University/CIS Information Security Office, requests will be turned over to Alicia Colon, Application and Development Support, for implementation.
Each campus’ access to Degreeworks CPA Crystal Reports will be limited to their own College’s data.

**Security User Protocol and Classification Type Designation**
Two types of security classification designation will be available- Report Manager and Report Developer. During phase one; DegreeWorks Crystal Reports will be released to Report Managers. During phase two; after staff has been trained on the various types of report, Report Developers will get access to writing their own reports.

**Report Managers will:**
- Run standard DegreeWorks CPA Crystal Reports from their campus directory stored on Citrix.
- Export standard DegreeWorks CPA Crystal Reports developed through Citrix to their PC.
- Link standard DegreeWorks Crystal Reports with campus ID files.
- Campus ID files will be used to export messages on SIMS such as TAP notification on student’s bill.

**Report Developers will:**
- Run and export standard DegreeWorks CPA Crystal Reports stored on Citrix.
- Export standard DegreeWorks CPA Crystal Reports developed through Citrix to their PC.
- Link standard DegreeWorks CPA Crystal Reports with campus ID files.
- Campus ID files will be used to export messages on SIMS such as TAP notification on student’s bill.
- Customize reports or write new reports that will be stored in their Citrix campuses directory.

**Campus User’s PC Set-Up**
Registrar must ensure User’s PC set up according to Citrix Security guidelines.

**Campus IT staff must:**
Install Symantec antivirus (version 10) or latest available required to run Citrix Client.
Install Citrix Client. (See attached document on procedures to set up Citrix Client)
Utilize CIS protocol for Reporting Problems with Citrix Crystal Developer. (See attached support document).

**Training on Accessing DGW Crystal Reports**
CIS will contract training services from SunGard. Training will be provided at CIS on the content of the reports and how to access these reports through Citrix Crystal Developer.

SG will train Users on:
- Understanding the relationship between the data elements and the report output.
- Understanding the different type of pre-defined reports and how to interpret the data results.
- Understanding the values in the database that will be used to create customized reports.

Report Developers who wish to create their own reports will need to contract services on how to write reports using Crystal Developer.

**Dates:** DGW Crystal Report Training TBA
DegreeWorks User Designation Form

College Name: ________________________________

Registrar Name: ________________________________

Registrar Signature: ________________________________

Date of Signed Request: ________________________________

Indicate the type of user classification assigned to each person.

<table>
<thead>
<tr>
<th>DegreeWorks Crystal Reports User’s Name</th>
<th>User’s Role or Job Function</th>
<th>DGW CR Classification Type – Report Manager or Report Developer</th>
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Note:
Registrar submits the following forms to CUNY-CIS Information Security Administrator, Beatrice Atobatele, 212-541-0364, Beatrice.atobatele@mail.cuny.edu, fax 212-541-0379.

- User signed Degreeworks Use and Access Agreement
- Registrar signed, Degree Works User Designation Form