University of Waterloo Software Engineering

# **Quest System User Manual**

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(as a part of SE 463 group project.)

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# Preface

The new system of Quest described in this user manual has some differences from the current system of Quest. To begin with, the new system has menu bars for navigation. This allows a user to not have to click on links like **Back to Academics** page, to get back to the Academics page. With the new menu bar, the user will be able to access any part of the Quest system without having to go back to a main home page.

Next, this system has the login screen for Quest on the Quest home page. This will save the user the inconvenience of navigating through various links to finally log in. Also, the new system is compatible with not just Internet Explorer, but with other browsers as well that are mentioned in the document.

Furthermore, the new system eliminates the need for a user to enter term codes like 1091, 1095, etc. Instead, the user has the option to select Fall, Winter, and Spring from a dropdown list, and select the year from a dropdown list as well. This will make it more convenient for the user to select a term, instead of memorizing term codes or having to look them up. It helps save time for the user. However, if the user would still prefer to enter term codes, then the option will still exist for the user to do so.

Finally, the new system has two advanced features. The first advanced feature is a personalized homepage that allows the user to add widgets to their home page such as class schedule and account summary. The second advanced feature is an enrollment planner that allows you to plan your enrollment for all future terms to fulfill your degree requirements. A more detailed description for both features can be found in the document.

# 1.0 Introduction

# 1.1 Product Overview

Quest is a system that allows current students to manage information and perform key tasks pertaining to their involvement at the University of Waterloo. It comes equipped with a deep set of rich tools and features that enables the user to perform common tasks such as: updating ones personal profile, viewing academic records, organizing ones academic schedule, managing financial information and much more. One of the notable observations of Quest is that it is a Web-based service therefore it is available from any device that has access to the internet by navigating to the URL,

<u>http://www.quest.uwaterloo.ca</u> and signing in with a unique account. Quest works with an ever-growing list of browsers, initially Internet Explorer, Firefox, Mozilla, Safari, and Chrome.

The University of Waterloo is a large institution composed of many students, each one having both common and unique tasks concerning their enrollment at the university. Providing students with an effective and user-friendly service, that encompasses the distinct needs of each student, is important to ensuring a manageable and thus successful experience for all students at the University of Waterloo.

# 1.2 Basic Features

Quest is a large system that contains a wide array of services that can be divided into three fundamental components: Academics, Finances and Personal Portfolio. Each core component contains a number of useful features that provide students with the tools necessary to manage information and carry out essential tasks.

## 1.2.1 Academics

As the name suggests, the Academics portion of Quest allows users to manage all areas applicable to their academic enrollment at the university. For instance, just to name a few, the Academics section allows students to manage enrollment details, view academic records and view course schedules. More details about related to all the features included in the Academic component can be found in subsequent sections of this user manual.

## 1.2.2 Finances

The Finances component enables students to view all financial information regarding their enrollment at the university. Through the Finances section you can perform functions such as: viewing a comprehensive breakdown of enrollments fees, obtaining information about your financial aids and more. Additional details related to all the features included in the Finances component can be found in subsequent section of this user manual.

## 1.2.3 Personal Portfolio

The Personal Portfolio section has tools that allow students to manage their personal information. Personal information can include personal details such as: contact information, demographic information and any *service holds* that may be tied to the student's account. More details about all the features that are included in the Personal Portfolio component can be found in subsequent sections of this user manual.

## 1.2.4 Menu Bar

The menu bar, as shown in Figure 1, is used to navigate to different parts of the system.

UW	ACADEMICS	FINANCES   ADMISSIONS   PROFILE   ADVANCED   HELP   EXIT
	ENROLLMENT SCHEDULES GRADES TRANSCRIPTS COURSES	ENROLL IN CLASS PRE-ENROLL FOR A FUTURE TERM
	L	

Figure 1 - Menu Bar

## 1.3 Conventions

## 1.3.1 User Assumptions

Users of Quest are assumed to be at least one of the following:

- Prospective University of Waterloo students
- Undergraduate University of Waterloo students
- Graduate University of Waterloo students

Users of Quest are expected to be registered with University of Waterloo, i.e. are expected to have a valid Quest account, which is authenticated by a Quest user name and a password.

**Quest user name** - is a unique sequence of lowercase letter and numbers 8 or less in length that is usually composed of the first letter of the user's first name and the user's last name. For instance, a user with a name, John Green, would have a Quest user name *jgreen*. In case, the Quest user name formed using the aforementioned technique is taken, a number is added after the first letter of the user's first name. For instance, Jane Green would have a Quest user name *j2green*, since *jgreen* is taken by John Green. Finally, if the Quest user name formed using the aforementioned technique is longer than 8 symbols, it is truncated to be exactly 8 symbols long. For instance, Stephen Chingalinga would have a Quest user name *schingal* and Sam Chingalinga would have a Quest user name *s2chinga*.

**<u>Ouest password</u>** - is a sequence of lowercase and uppercase characters and numbers 6 or more length.

### 1.3.2 Terminology

The following terms are used throughout the manual. This list is taken from <u>www.quest.uwaterloo.ca/help/glossary.html</u> and has a few additions to it.

- Academic Career Undergraduate or Graduate
- Academic Level
  - For Undergraduate current study term 1A, 1B, 2A, 2B, 3A, 3B, 4A, 4B.
  - For Graduate "M" for masters and "D" for doctorate (PhD).
- Academic Program a set of courses, a number of which may be mandatory and of a specialized nature, leading toward a particular degree, option or minor
- Antirequisite a condition preventing enrollment in a course.
- Audit If a student audits a course, the student is allowed to participate in the course without being examined on its content
- Campus the campus indicates which institution offers the course. Most courses are offered through the main University of Waterloo campus, but some are offered through a University college such as Renison, or in cooperation with another university, such as WLU (Wilfrid Laurier University)
- Catalog Number the 3-digit number that identifies a particular course (e.g., ACC121). It sometimes has a single letter as a suffix (e.g., FR 252*A*).
- Class Enrollment the process of selecting and enrolling in courses for a particular term via Quest prior to final date for fee arrangement, having them approved, and recorded with the Registrar's Office. Some programs may require mandatory core courses to be entered by the Registrar's Office.

- Class Number a 4-digit number that identifies a particular course component/meet and class section (e.g., **1597** LEC 001; **1879** LAB 101).
- Component the term used to refer to the various parts of courses (e.g., lectures, labs, tutorials, etc.).
- Corequisite a course that must be taken concurrently, if it has not been taken in a prior term.
- Course a unit of study relating to a specific academic discipline and identified by a course/subject name and number. All course names have abbreviations (e.g., Psychology 101 is often abbreviated to PSYCH 101).
- Course Abbreviation a maximum of five letters is used to identify course subjects.
- Course Catalog the listing of courses, which includes the description, requisites, terms offered, and special notes.
- Course ID (Number) the 6-digit number identifying the course; leading 0s are ignored.
- Course Title the title of the course. When searching for courses in Quest, you may specify the course title under the description field.
- Credential a degree, diploma, or certificate.
- Credit see Unit
- Department a smaller subset within a Faculty, such as the Mechanical Engineering, in the Faculty of Engineering.
- Drop drops the course from your schedule.
- Elective a course not specifically required for a degree but counting towards it, to be chosen freely by the student either from within a specified group of courses or more broadly from courses offered anywhere across the University.
- Enrollment Appointment a block of time during which you can enroll in classes before Open Enrollment begins for the term. Applicable to continuing undergraduate students only.
- Enrollment Capacity at the maximum number of students allowed to enroll in each section.
- Enrollment Requirement Group a group of requisites for the course that restricts the course to certain students.
- Enrollment Total the number of students currently enrolled in each section.

- Faculty one of Math, Engineering, Arts, Applied Health Sciences (AHS), Environmental Studies (ES), and Science.
- Grade Point Average a direct calculation of student's unit-weighted average using your numeric grades and the weight/value of each grade in units.
- Location indicates where the actual course takes place, or if the courses is offered through Distance Education (DE) whether it is offered online (WEB) or not online (HOME).
- Major the area(s) of academic emphasis selected in either an Honours or a General plan. Applicable to undergraduate students only.
- Minor a group of approved courses taken by a student in an Honours or a fouryear General plan in a subject outside the "major" area. Applicable to undergraduate students only.
- Official Transcript a record of student's courses, grades earned, units obtained towards degree, and more. If graduate schools or employers require student's transcript, an official transcript is usually required.
- Open Enrollment during this period, enrollment is open to all students; this period is usually longer than enrollment appointments.
- Option a specified combination or grouping of courses which provides a secondary emphasis in certain plans. The emphasis may be in another academic subject or in a career-oriented area.
- Pre-Enrollment the process of making course requests for future terms using Quest. Faculties will make teaching plans using this course demand data.
- Prerequisite the requirement(s) that must be met in order to be eligible to enroll in a course. Prerequisites may include passed courses, registration in a specific program or plan and an academic level or academic standing.
- Primary Component the main component for the course. It's the first component listed for every course, and the class section number beings with a "0" (e.g., LEC 001).
- Priority Enrollment for courses designated as "priority enrollment," preference in scheduling is given to students who require such courses to satisfy specific degree requirements.
- Quest the name of the service.
- Registered Status under student finances, the status of their arrangement with the University for payment is shown here:
  - Enroll Request fees have not been arranged. Full payment is expected at the specified deadline

- Fees Arranged fees have been arranged and payment is expected when the student has received funds (e.g., from OSAP, or scholarships)
- Coop student is on coop term
- Related Component 1 the second component of the course. It begins with a "1" in the leading position of the class section number (e.g., LAB 101).
- Related Component 2 the third component of the course. It begins with a "2" in the leading position of the class section number (e.g., TUT **2**01).
- Reserve Capacity the portion of a class enrollment capacity that is reserved for a particular group of students. This designation appears on the schedule of classes, directly beneath each section that has a reserve capacity assigned.
- Schedule of Classes the online list of classes offered for a particular term, with details such as times, locations, and instructors.
- Section the 3-digit number that identifies a particular section of a course component/meet (e.g., LEC **001**).
- Service Hold is a notice that may affect your use of Quest, or your interaction with the University. For instance, if you owe fees or other goods, or have committed an academic offence, you may find a Hold placed on your account. Holds may prevent you from receiving transcripts, or enrolling yourself using Quest.
- Session an invocation of Quest from the time a user signs on to the system until the time he/she signs offs.
- Specialization a specified combination or grouping of courses which provides a primary emphasis within a plan.
- Status the status of a class may be open for enrollment if spaces are available; otherwise, it is closed.
- Student ID a unique 8-digit number assigned to every student when they apply to the University.
- Term is a particular 4-month period within which sessions are defined and fees are arranged. It is also used with reference to work terms for students in the co-operative system of study. For undergraduate students, an academic year is usually 2 academic terms if you are in the regular system of study in which full-time students take 5 courses per term.

Fall	F	September to December
Winter	W	January to April
Spring	S	May to August

The breakdown of the 4-digit number for terms is as follows:

- The first digit is the century; that is, "1" means the 21<sup>st</sup> century.
- The middle 2 digits represent the year; that is, "08" represents the year 2008.
- The last digit represents the first month of the term; that is, "1" represents January, "5" represents May and "9" represents September.
- Unit the credit value associated with a course. Unit weights are used in the calculation of averages for academic standing. Most courses have unit weights of 0.5, but some have other weights, such as 0.25, 1.0 and 2.0.
- Unofficial Transcript record of student's courses, grades earned, units obtained towards your degree, and more. Unofficial transcripts are for viewing purposes only and can be obtained through UW's online student information system: Quest.
- User the person who uses Quest as defined in <u>User Assumptions</u> section.

## 1.3.3 Abbreviations

<u>System</u>

UW - University of Waterloo

LMC - left mouse click

RMC - right mouse click

#### Application

UG - undergraduate

GRAD - graduate

GPA - Grade Point Average

## **1.3.4 Notational Conventions**

The following texts are used in the manual:

- Times New Roman is used for normal text
- *Times Italics* is used for emphasis and new terms in normal text
- Times Bold is used for section names
- Arial is used for page names.
- Arial Italics is used for drop-down list values.

- Arial Bold is used for screen entities.
- Arial Bold and Italics is used for keyboard keys.
- Menu Item->MenuItemB is used to specify the menu item MenuItemB in the menu MenuA

# 2.0 Getting Started

# 2.1 Sign-on

In order to begin using Quest you must sign-on with a valid user account. Typically, your account credentials are assigned to you by the University of Waterloo. For this particular example we will assume that your user name is: *j2smith* with password: *56G9r2F*. The following are steps outline how to sign-on to quest.

- Using your browser go to: <u>http://www.quest.uwaterloo.ca</u>.
- You are presented with two input fields. Type the user name and password you were assigned.
- LMC submit to log in.

After you have logged in, you are directed to the main Quest page. The Quest Login fields are shown in Figure 2 below.

Quest lo	gin					
Log on to Quest using your <u>UWdir</u> userid (up to a maximum of 8 characters) and password:						
User ID:		(up to 8 characters)				
Password:						
	Submit					

Figure 2 - Quest Login Fields

# 2.2 Help Mode

When you are logged into Quest there is a **Help** button available situated at the top menu of the Quest interface. When the **Help** button is clicked another window is opened containing relevant help content for the page you are currently on.

For instance, if you are on the Academics page, clicking on the **Help** button displays help content related to the Academic page, such as definitions, and what each feature under the Academic component does.

# 3.0 Basic Use Cases

The following section explains all the basic use cases of the Quest system.

# 3.1 Viewing and modifying academics

In order to view and modify academics, LMC Academics Tab in the menu bar.

## 3.1.1 Undergraduate Pre-Enrollment Course Selection

Once the **Academics** Tab in the menu bar is selected, LMC the **Pre-Enrollment** menu option to see a list of options for pre-enrollment.

#### 3.1.1.1 Viewing Future Term Course Offerings

To view future term course offerings,

- 1. LMC View Future Term Course Offerings.
- 2. LMC in the **Term** box, shown in Figure 3, and enter the term number. [Alternative exists]
- 3. LMC in the **Subject Area**, and enter the abbreviated subject area that you would like to search for. For example, "CS". [Alternative exists]
- 4. LMC on the **Search** button to execute the search query.
- 5. A page returning all the courses for the subject area are displayed, with the **Course Number, Title, Units, Instruction Mode,** and **Campus**.

Course Offering Se	earch
Select Term and	d Subject
Select the term and su Click Search to continu	bject for which you want to search or use the 🔍 to make a selection. Je.
*Term:	1095 C Spring 2009
*Subject Area:	CS Computer Science
* Required Field	
Search	

Figure 3 - Course Offering Search

To View All Future Term Course Offerings, LMC the link **View All Future Term Course Offerings**. This takes you to the following page:

http://www.adm.uwaterloo.ca/infocour/CIR/SA/uwpcshtm.html

#### Alternatives:

2.1. If you do not know the term number, LMC on the magnifying glass icon to search for the term number on the Term Lookup Page.

On the Term Lookup Page, shown in Figure 4,

- 1. Select one of the three term identifiers from the **Term** drop-down list: *Fall, Winter, Spring.*
- 2. Select the year from the **Year** drop-down list.
- 3. LMC the **Lookup** Button or **Cancel** to return back to the View Future Term Course Offerings Page.
- 4. If the **Lookup** Button was selected, the **Term** Box shall be automatically populated with the correct term number from the Term Lookup Page.
- 3.1. If you do not know the subject area abbreviation, LMC on the magnifying glass icon to search for the subject area on the Subject Area Lookup Page.

<u>Term Looku</u>	Þ
Select a Term:	Fall ▼
Year:	2008 🔻
	Cancel Lookup

Figure 4 - Term Lookup Page

On the Subject Area Lookup Page, shown in Figure 5,

- 1. Enter the full name of the subject area you are looking for. For example, "Computer Science".
- 2. To return back to the View Future Term Course Offerings Page, LMC the **Cancel** Button, otherwise LMC the **Lookup** Button.
- 3. A list of subject area abbreviations is returned that match your query. If no subject areas match the search query, a message saying "No results found" will be displayed, and you may execute your search again.
- 4. LMC the subject abbreviation code that you want from the list to be returned back to the View Future Term Course Offerings Page with the **Subject Area** Box automatically populated.
- 5.

Lookup Subject						
Academic Institution: Subject Area: Description:	UWATR					
Lookup Clear	Cancel					

Figure 5 - Subject Area Lookup Page

#### 3.1.1.2 Pre-enrolling for a Future Term

To pre-enroll for a future term,

- 1. LMC Pre-enroll for a Future Term. [Exception exists]
- 2. A list of the courses that you are currently enrolled in for the future term shall be displayed. [Exception exists]
- 3. LMC the Add Courses button.
- 4. On the Add Courses Page, shown in Figure 6, Add/Delete Rows to the number of courses you would like to pre-enroll in by doing a LMC on either Add Row or **Delete Row**.
- 5. LMC Add Course within the row to add a specific course.
- 6. On the Add Course Page, select the faculty from the **Faculty** drop-down list.
- A list of the courses being offered that term shall be populated in the Course Number drop-down list. Select the course you would like to enroll in. (Note: To get the faculty and course number for the course, see the View Future Term Course Offerings Section.)
- 8. Under the Time of Day section, LMC the radio button indicating whether you would prefer a **Day** or **Evening** Class, or an **Evening** class.
- 9. Under the Campus section, LMC the faculty you would prefer from the Campus drop-down list.
- 10. LMC the **Submit** button to return back to the Add Courses Page, with the course recently selected appearing in the row. Select **Cancel** to return back to the Add Courses Page with no changes made.
- 11. Perform steps 5-10, until you have selected all the courses you would like to preenroll in.
- 12. On the Add Courses Page, rank all the courses selected from 1-9 under the Priority column to indicate which course is of most importance for you to enroll in. [Exception exists]
- 13. LMC on the **Submit** button to finish pre-enrolling for the courses you selected in your table. [Exception exists]
- 14. To remove any pre-enrolled courses you selected, LMC the **Remove Courses** button. [Exception exists]
- 15. You shall be presented with the list of courses you pre-enrolled in.
- 16. LMC the checkboxes beside all the courses you would like to remove.
- 17. LMC on the **Submit** button to finish removing these courses from your preenrollment courses.

Priority	Faculty	Course Number	Time of Day	Campus	
9 🔻	CS 🛡	341 🛡	Day <b>O</b> Evening <b>O</b>	Waterlod ▼	Delete
Add Rov	N				

Submit

#### Figure 6 - Add Course Page

#### Exceptions

- 1.1. You can only Pre-enroll for a future term during a certain designated time period (approximately a week). If you try to go to the **Pre-enroll for a Future Term** during any other time, you receive an error page stating the issue.
- 1.2. You can only Pre-enroll for a future term if you have room for electives for that term. If you try to go to the **Pre-enroll for a Future Term** when you have no electives, you will receive an error page stating the issue.
- 2.1. No courses will be displayed if you are not automatically registered in courses already by the registrar.
- 12.1. There can only be one course associated with each rank.
- 13.1. Attempting to pre-enroll in a course that you do not have the pre-requisite for results in an error. An error message is displayed with the course(s) that failed to add. A message containing any successful pre-enrollment courses, if any, is displayed.
- 14.1. The **Remove Courses** button becomes inactive if you have not pre-enrolled for any courses yet.

#### 3.1.1.3 Viewing Future Term Course Selections

To view future term course selections,

- 1. LMC View Future Term Course Selections.
- 2. A list of all the terms where pre-enrollment was active are displayed. [Exception exists]
- 3. LMC the term you would like to see.

4. A list of all the pre-enrolled course selections are displayed. [Exception exists]

#### Exceptions

- 2.1. If there have not been any terms where pre-enrollment was allowed, no terms will are displayed.
- 4.1. If you have not pre-enrolled in any courses for a specific term, no courses are displayed.

#### 3.1.1.3 Viewing Pre-enrollment Results

To view pre-enrollment results,

- 1. LMC View My Pre-Enrollment Results.
- 2. LMC the term you would like to see results for. [Exception exists]
- 3. A list of the Successful Course Enrollments (with Subject, Catalog Number and Section) and Unsuccessful Course Enrollments (with Subject, Catalog Number, and Error Message) are displayed. [Exception exists]

#### Exceptions

- 2.1. If you have not pre-enrolled in any terms, you shall not see any terms to select.
- 3.1. If the term has not done enrollment yet, there are no results. A message is displayed to you to check again another time after enrollment takes place for the term.

## 3.1.2 Enrollment

Once the **Academics** Tab in the menu bar is selected, LMC the **Enrollment** menu option to see a list of options for enrollment.

#### 3.1.2.1 Viewing Undergrad Enrollment Appointment

To view your UG enrollment appointment,

- 1. LMC View Undergrad Enrollment Appointment
- 2. A list of all the terms that you have been enrolled in and will want to enroll in is displayed. [Exception exists]
- 3. LMC the term you would like to see your UG enrollment appointment for.
- 4. The Undergrad Enrollment Page displays the following information: Session, Appointment Number, Start Date/Time, End Date/Time, and Unit Limits (for the term, for this session, and for this appointment). [Exception exists]

#### Exceptions

- 2.1. If you have not been enrolled into UW yet, you do not see any terms.
- 4.1. For a future term, an enrollment appointment may not be scheduled yet. If this is the case, a message is displayed telling you to check back another time.

#### 3.1.2.2 Enrolling in a Class

Once you have a valid enrollment appointment, you are able to enroll in classes for an upcoming term.

To enroll in a class,

- 1. LMC Enroll in a Class to navigate to the Select Enrollment Term page.
- 2. LMC the academic term that you need to add a class to. The browser navigates you to the View My Schedule page. [Exception exists]
- 3. If any classes have already been added to your schedule then you see a list of them here. At the bottom of the page LMC the **Add a Class** link to navigate to the Add a Course page.
- 4. In the box with columns **subject**, **class number** and **section** you must enter the correct class subject, class number and section in the text boxes to add the class that you want.
  - a. LMC the **subject** box and enter the subject of the class that you want to add. [Alternative exists]
  - b. LMC the **class number** box and enter the class number of the class that you want to add. [Alternative exists]
  - c. LMC the **section** box and enter the section number for the class you want to add. [Alternative and Exception exists]
- 5. LMC the **Add** button to add the class to your schedule. [Exception exists]

#### Alternatives

4.a.1. If you do not know the subject then LMC the **magnifying glass** icon beside the textbox to search for the subject you want. The browser navigates you to the Subject Area Lookup page.

On the Subject Area Lookup page, as shown previously in Figure 5,

- 1. In the **search** box type in words that relate to the subject that you are interested in. For example, type "Computer Science" to find the subject "CS".
- 2. LMC the **Search** button to search for the subject name.

- 3. If results were found, a list of subjects is populated in the list box next to the search box. LMC the appropriate one and LMC the **OK** button to return back to the Add a Course page.
- 4.b.1. If you do not know the class number then LMC the **magnifying glass** icon beside the textbox to search for the class number you want. The browser navigates you to the Course Search page.

On the Course Search page, shown in Figure 7,

- 1. In the **search** box type in words that relate to the class that you are interested in. For example, type "Algorithms" to find the class number "341"
- 2. LMC the **Search** button to search for the class number.
- 3. If results were found a list of numbers are populated in the list box next to the search box. LMC the appropriate number and LMC the **OK** button to return back to the Add a Course page.

Course Search Page	Course Numbers
Enter a description: Algorithms	341
Cancel Search	762
	ОК

**Figure 7 - Course Search Page** 

4.c.1. If you do not know the section then LMC the **magnifying glass** icon beside the textbox to search for the section. The browser navigates you to the Section Lookup page.

On the Section Lookup page, shown in Figure 8,

- 1. LMC the section that you want to join.
- 2. LMC the **OK** button to return back to the Add a Course page.

Clas	s Sections									Find	1-2 of 2
	Class Nbr 4277 Session:	cs	Catlg Nbr 341	Sect 001	Description Algorithms		Units 0.5	Comp LEC	Combined	<u>I Section</u>	
	Time: 11	:30AM 12:	50PM TuT	h	Room:	MC 2054	Dat Inst		01/05/2009 - Shallit,Jeffrey		2009
	Class Nbr 4278 Session:	CS	Catlg Nbr 341	<b>Sect</b> 002	Description Algorithms		Units 0.5	Comp LEC	Combined	<u>I Section</u>	
	Time: 1:0	0PM 2:2	0PM TuT	h	Room:	MC 4021	Dat Inst		01/05/2009 - Shallit,Jeffrey		2009
										Find	1-2 of 2

Figure 8 – Section Lookup Page

#### Exceptions

- 2.1. You cannot add classes to previously attended terms.
- 4.1. You will not be able to add the class if the section is full.
- 5.1. Class will not be able to be added to your schedule if your schedule is full.
- 5.2. Class will not be able to be added to your schedule if you do not have the prerequisites for the class.

#### 3.1.2.3 Viewing Class Schedule

To view your class schedule,

- 1. LMC View Class Schedule.
- 2. A list of all the terms you have been enrolled in are displayed. [Exception exists]
- 3. LMC the term you would like to see your class schedule for.
- 4. A list of all enrolled, waitlisted, and dropped classes are shown with the following information: Course Name and Number, Section, Component, Description, Grading Option, Units, Status, Schedule, Instructor, Location and Date).

#### Exceptions

1.1 If you have not been enrolled into UW yet, no terms are displayed.

#### 3.1.2.4 Viewing Weekly Schedule

To view your weekly schedule,

- 1. LMC View Weekly Schedule.
- 2. In the As Of Date box, as shown in Figure 9, enter the date of the week you are interested in seeing. [Alternative exists]
- 3. In the **Start Time** box, enter the start time in military time or with AM/PM.
- 4. In the End Time box, enter the end time in military time or with AM/PM.
- 5. In the Display Options section, select the days of the week you would like to see the weekly schedule for by selecting/unselecting the checkboxes beside each day.
- 6. LMC **Go** to your weekly schedule displayed for the date and times specified. [Exception exists]

Week of 2	24 November 2	2008 - 30 November	2008				
Time	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday
8:00AM							
8:30AM							
9:00AM							
9:30AM			SE 463 (101) Software Regts Spec & Analysis TUT - Tutorial MC - Mathematics & Computer 4058 9:30AM - 10:20AM				
10:00AM			SE 463 (101) 9:30AM - 10:20AM				
10:30AM							
11:00AM							
11:30AM		SE 302 (001) Seminar SEM - Seminar MC - Mathematics & Computer 4058 11:30AM - 12:20PM		ECE 354 (101) Real-time Operating Systems TUT - Tutorial RCH - Rod Coutts Hall 309 11:30AM - 12:20PM			
12:00PM		SE 302 (001) 11:30AM - 12:20PM		ECE 354 (101) 11:30AM - 12:20PM			

Figure 9 -	View	Weekly	Schedule Page
------------	------	--------	---------------

#### Alternatives

2.1 You can enter the date alternatively by clicking the **calendar** icon and selecting the date from there.

#### Exceptions

6.1 If a period of time or date is selected where you are not enrolled in a class, an empty schedule is returned.

## 3.1.3 Course Catalog and Schedule

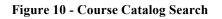
Once the **Academics** Tab in the menu bar is selected, LMC the **Course Catalog and Schedule** menu option to see a list of options for enrollment.

#### 3.1.3.1 Viewing the Course Catalog

To view the course catalog,

- $1.\ LMC$  View Course Catalog.
- 2. Select the academic institution from the **Academic Institution** drop-down list, shown in Figure 10.
- 3. Enter the subject area abbreviation in the Subject Area box. [Alternative exists]
- 4. <u>Optional</u>: Enter the catalog number in the **Catalog Nbr** box.
- 5. Select Exact Match or Wildcard from the Search Type drop-down list.
- 6. Enter the term number in the **Term** box. [Alternative exists]
- 7. LMC **Search**. [Exception exists]
- 8. If a catalog number was entered, only the specific course is displayed. If there is no catalog number, all courses in the subject area specified are displayed. Information about the course(s) is/are presented on this page. [Exception exists]

Course Catalog Se						
Search Criteria	Search Criteria					
Enter institution and	Enter institution and subject. Catalog number is optional.					
*Academic	University of	Waterloo	\$			
Institution:						
*Subject Area:	CS C	Computer Scie	puter Science			
Catalog Nbr:		*Exact Match:	Exact Match	÷		
*Term:	1095 🔍	Spring 2009				
* Required Field						
Search						



#### Alternatives

3.1. If you do not know the subject area abbreviation, LMC on the magnifying glass icon to search for the subject area on the Subject Area Lookup Page.

On the Subject Area Lookup Page, as shown previously in Figure 5

- 1. Enter the full name of the subject area you are looking for. For example, "Computer Science".
- 2. To return back to the View Future Term Course Offerings Page, LMC the Cancel Button, otherwise LMC the Lookup Button.
- 3. A list of subject area abbreviations will be returned that match your query. If no subject areas match the search query, a message saying "No results found" will be displayed, and you may execute your search again.
- 4. LMC the subject abbreviation code that you want from the list to be returned back to the View Future Term Course Offerings Page with the **Subject Area** Box automatically populated.
- 6.1. If you do not know the term number, LMC on the magnifying glass icon to search for the term number on the Term Lookup Page.

On the Term Lookup Page, as shown previously in Figure 4,

- *1*. Select one of the three term identifiers from the **Term** drop-down list: *Fall, Winter, Spring.*
- 2. Select the year from the **Year** drop-down list.
- 3. LMC the **Lookup** Button or **Cancel** to return back to the View Future Term Course Offerings Page.
- 4. If the **Lookup** Button was selected, the **Term** box automatically populates with the correct term number from the Term Lookup Page.

#### Exceptions

- 7.1 All required fields must be entered; otherwise an error is displayed to fill in the remaining fields.
- 8.1 If there are no results matching the search query, a message saying 'No results were found' is displayed and you can execute a new search.

#### 3.1.3.2 Viewing the Schedule of Classes

To view the schedule of classes,

- $1.\ LMC$  View Schedule of Classes.
- 2. Select the institution from the Institution drop-down list, shown in Figure 11.
- 3. Enter the term number in the **Term** box. [Alternative exists]
- 4. LMC Search. [Exception exists]
- 5. On the Class Search Page, enter values for any of the following to execute your search: Subject Area, Catalog Number, Description, Course Component, Course Career, Session, Campus, and Location Code.

 All classes that match the search query are displayed with the following information: Class Number, Subject, Catalog Number, Section, Description, Units, Component, Status, Available, Wait, Time, Dates, Room and Instructor. [Exception exists]

Class Search						
Select Institution and Term						
Select the institution and term for which you want to search. Then click Basic Search or Advanced Search to continue.						
*Institution: University of Waterloo						
*Term:	٩					
<ul> <li>Required Field</li> </ul>						

Figure 11 – View Schedule of Classes

#### Alternatives

3.1. If you do not know the term number, LMC on the magnifying glass icon to search for the term number on the Term Lookup Page.

On the Term Lookup Page, as shown previously in Figure 4,

- 1. Select one of the three term identifiers from the **Term** drop-down list: *Fall, Winter, Spring.*
- 2. Select the year from the **Year** drop-down list.
- 3. LMC the Lookup Button or Cancel to return back to the View Future Term Course Offerings Page.
- 4. If the **Lookup** Button was selected, the **Term** box will automatically populate with the correct term number from the Term Lookup Page.

#### Exceptions

- 4.1. All required fields must be entered and must have valid values; otherwise an error is displayed.
- 6.1. If there are no results matching the search query, a message saying 'No results were found' is displayed and you can execute a new search.

#### 3.1.3.3 Viewing the Examination Schedule

To view the examination schedule,

- 1. LMC View Examination Schedule.
- 2. This links to the Registrar's page and a PDF file can be downloaded to see the examination schedule. [Exception exists]

#### Exceptions

2.1. The examination schedule may not be up yet.

## 3.1.4 Academic Record

Once the **Academics** Tab in the menu bar is selected, LMC the **Academic Record** menu option to see a list of options for enrollment.

#### 3.1.4.1 Viewing Grades

To view your grades,

- 1. LMC View My Grades.
- 2. A list of all the terms you have been enrolled in is displayed. [Exception exists]
- 3. LMC the term you would like to see your grades for. [Exception exists.]
- 4. The list of your courses for the term specified are displayed with Class Number, Section, Course Title, Component, Grading Basis, Official Grade, Units Earned, Courses Attempted, Units Taken Toward GP, Units Passed Towards GPA, Grade Points, Current GPA, and Cumulative Statistics. [Exception exists.]

#### Exceptions

- 2.1. If you have not been enrolled into UW yet, no terms are displayed.
- 3.1. Clicking on a term that has not posted its marks yet results in an error page telling you when the marks will be posted for that term.
- 4.1. Some courses may not have grades yet. 'NR' is displayed for these instances.

#### 3.1.4.2 Viewing Unofficial Transcript

To view your unofficial transcript,

1. LMC View Unofficial Transcript.

- 2. Select your academic institution from the Academic Institution drop-down list.
- 3. Select your report type from the **Report Type** drop-down list.
- 4. LMC Go to generate your unofficial transcript.

#### 3.1.4.3 Viewing Advisors

For Graduate Students only, to view your advisors

- 1. LMC View My Advisors.
- 2. LMC the term you would like to see your advisors for.
- 3. A detailed description of your advisors is shown for that term.

## 3.1.5 Distance Education

Once the **Academics** Tab in the menu bar is selected, LMC the **Distance Education** menu option to see a list of options for enrollment.

#### 3.1.5.1 Viewing/Changing Exam Schedule Details

To view/change exam schedule details,

- 1. LMC View/Change Exam Schedule Details.
- 2. A list of your Distance Education courses appears along with the **date**, **time** and **location** of your exam. [Exception exists]
- 3. To change the exam schedule, click the **Change** button that takes you to a PDF form to fill out for a request to change exam date/time. [Exception exists]

#### Exceptions

- 2.1. If you do not have any Distance Education courses, you get a page saying no information about this transaction you requested.
- 2.2. Not all dates, times and locations may be final, therefore you may be told to check back again later.
- 3.1. Not all courses allow for a change in exam date and/or time.

#### 3.1.5.2 Viewing Materials Information

To view material information

- 1. LMC View Materials Information.
- 2. A list of all the materials for all Distance Education courses is displayed. [Exception exists]

#### Exceptions

2.1. If you do not have any Distance Education courses, you get a page saying there is no information about this transaction you requested.

#### 3.1.5.3 Viewing Assignment Information

To view material information

- 1. LMC View Assignment Information.
- 2. A list of all the assignment information for all Distance Education courses is displayed. [Exception exists]

#### Exceptions

2.1. If you do not have any Distance Education courses, you will get a page saying no information about this transaction you requested.

# 3.2 Viewing Admission Information

In order to view and modify academics, LMC Admissions Tab in the menu bar.

## 3.2.1 View Admission Offers

To view admission offers

- 1. LMC View Admission Offers
- 2. A list of all the offers for all programs that you have been accepted to is displayed. [Exception exists]

#### Exceptions

2.1. If you do not have any admission offers, a page saying no admission offers available is displayed.

#### 3.2.1.1 Accepting an Admission Offer

To accept an admission offer

- 1. LMC Accept Offer, next to a program of which you were offered acceptance.
- 2. The **Accept Offer** that you clicked on changes to "Offer Accepted" to distinguish the program from the other offers (The decision is finalized after the offer deadline.) [Alternative exists]

#### Alternatives

2.1. If you LMC on another **Accept Offer**, this becomes the newly accepted offer. (The decision is finalized after the offer deadline.)

# 3.3 Viewing and Modifying Personal Profile

In order to view and modify personal profile, LMC **Personal Profile** Tab in the menu bar.

## 3.3.1 Viewing and Modifying Contact Information

The contact information section has a tabular menu system which changes the content of the page based on the currently selected tab.

#### 3.3.1.1 View and Modify Names

LMC the **Names** tab and you are presented with a table for each of your preferred and primary names.

To edit your names, follow the instructions in the *Name Change Form*. You can retrieve this form by LMC **Name Change Form**.

#### 3.3.1.2 View and Modify Addresses

To view and modify your address

- 1. LMC the **Addresses** tab and you are presented with a table containing your address information.
- 2. LMC **Change Mail and Home Addresses(s)** to make the fields in the table editable, as shown in Figure 12. [Alternative exists]

- 3. Enter your street addresses into the corresponding **Address** boxes (At least one **address** box needs to have information) (required)
- 4. Enter your city into the **City** box (required).
- 5. Enter your country into the **Country** box.
- 6. Enter the short form version of your province or state in the **Province** or **State** box (required). [Alternative Exists]
- 7. Enter your postal code or zip code [Exception exists]
- 8. Enter the date the address change will take effect in the **Date** box.
- 9. To add or change your country LMC Add/Change Country.

From the lookup country page

- 1. Select the search criteria from the dropdown box: **Name** or **Description**.
- 2. Enter the description into the **Description** box or the country name into the **Name** box.
- 3. LMC Lookup to search for results.
- 4. If there are results LMC on one of them to select it and return back to previous page.
- 10. LMC Save button to save your change. [Exception exists]

Home, Mailin	g		Address Type
Country:	Canada	Add / Change Country	✓ Home
Address 1:			Mailing
Address 2:			
Address 3:			
Address 4:			
City:	Scarborough		
County:		Postal:	
Province:	٩		
	will take effect:	11/29/2008	
Save			

Figure 12 - Change Address Page

#### Alternatives

2.1 If no address exists LMC Add a new Address to view the editable address fields.

- 2.2 Select if this address is either **Mail** or **Home** by LMC on either (or both) of the checkbox's (at least one must be checked).
- 2.3 Follow steps from above 3-9 as above.

6.1 To search for a province/state LMC on the **magnifying glass** icon next to the province box.

On the Search state/province search page, as shown in Figure 13,

- 1. From the first dropdown box select either to search by **State/province** or **Description**.
- 2. Enter the state/province in the **State/province** box or the description in the **description** box.
- 3. LMC Lookup to search for matching results. [Exception exists]
- 4. If results were found LMC one of them to select that value.

Search By:	State	÷
State:		
Lookup	Cancel	Advanced Lookup

Figure 13 - Search State/Province Page

#### Exceptions

- 3.1 Results may not be found based on your search criteria
- 8.1 Use the calendar to select a date
  - 1. Select the month from the **Month** dropdown box. [Alternative]
  - 2. Select the year from the **Year** dropdown box.
  - 3. LMC on a date on the calendar to select a day. [Alternative]

#### Alternatives

- 1.1 Use the arrow icons to change the month.
- 3.1 You can select the current date by LMC on **Current Date**.

#### 3.3.1.3 View and Modify Phone Numbers

LMC the **Phone Numbers** tab to view a list of all the phone numbers that have been added

To add a phone number:

- 1. LMC Add a Phone Number box.
- 2. Select a phone type from the **Phone Type** dropdown box.
- 3. Enter a phone number in the **Phone Number** box.
- 4. Enter an extension in the **Extension** box.
- 5. Select if it is your preferred phone number. Only one phone number can be your preferred number.
- 6. LMC the **Save** button to add the number to the list.

To delete a phone number

LMC the **Delete** box next to the phone number you want to delete.

## 3.3.1.4 View and Modify Email Address

To view e-mail addresses LMC E-mail Address tab.

To edit your e-mail address you must update it via <u>https://ego.uwaterloo.ca/~uwdir/Update</u>

## 3.3.2 Viewing Demographic Information

To view demographic information,

- 1. LMC View Demographic Information.
- 2. All demographic information pertaining to you is displayed here. [Exception exists]

#### Exceptions

2.1. If Quest does not have all your demographic information some fields may be empty.

## 3.3.3 Viewing Service Holds

To view demographic information,

- 1. LMC View Service Holds.
- 2. All your service holds are displayed here. [Exception exists]

#### Exceptions

2.1. If you do not have any service holds, no holds are displayed.

# 3.4 Viewing Financial Information

In order to view financial information, LMC the **Finance** tab in the menu bar.

## 3.4.1 Viewing Account Information

Once the **Finance** tab has been selected, LMC **Account Information**.

#### 3.4.1.1 Viewing Account Summary

To view your account summary,

- 1. LMC View Account Summary.
- 2. A list of all your current and past-enrolled terms is displayed. [Exception exists]
- 3. LMC the term you are interested in seeing your account summary for.
- 4. Your balance is then shown, and to see more detailed information, LMC the **Detailed Account Summary** link. [Exception exists]
- 5. Now a detailed account summary is shown showing your Status, Tuition Fees, Financial Aid, OSAP Information, and all Balances.
- 6. For fee payment instructions, LMC the **Fee Payment Instructions** link to be taken to a page that links to various banks and tells you how to pay your fees.

#### Exceptions

- 2.1. If you are not enrolled in any term yet, no terms are displayed.
- 4.1. If you click on a term that has not calculated its fees yet, no account summary information is shown yet. You are told to come back a later time.

#### 3.4.1.2 Viewing Financial Aid

To view your financial aid,

- 1. LMC View Financial Aid.
- 2. A list of all your current and past-enrolled terms is displayed. [Exception exists]
- 3. LMC the term you are interested in seeing your financial aid for.
- 4. A detailed description of all your financial aid is shown. [Exception exists]

#### Exceptions

2.1. If you are not enrolled in any term yet, no terms are displayed.

4.1. If you do not have any financial aid, no information are displayed.

#### 3.4.1.3 Viewing Earnings

To view your earnings,

- 1. LMC View Earnings.
- 2. A list of all your current and past-enrolled terms are displayed. [Exception exists]
- 3. LMC the term you are interested in seeing your earnings for.
- 4. A detailed description of all your earnings is shown. [Exception exists]

#### Exceptions

- 2.1. If you are not enrolled in any term yet, no terms are displayed.
- 4.1. If you do not have any earnings, no information are displayed.

#### 3.4.1.4 Viewing Useful Links

To view some useful links,

- 1. LMC View Useful Links.
- 2. A list of useful links are displayed such as links to Earnings, Financial Aid, OSAP, and Graduate Student Award Regulations

# 4.0 Advanced Features

## 4.1 Homepage Personalization

## 4.1.1 Overview of Feature

The personalized homepage allows you to customize what is displayed on the next page subsequent to logging in. That is, you are able to add custom widgets to the main Quest page. Widgets can contain information and tools from various parts of the Quest system. For example, you can add a widget that contains your class schedule.

Quest is a very large system, where depending on the user some features and tools are viewed and used more frequently than others. The personalized Quest homepage enables you to customize what part of Quest they see first.

An example of a personalized homepage is shown below in Figure 14. The screen is divided into two sections. On the left there are the widgets added by the user. On the right, there is a list of actions that control the widget list.

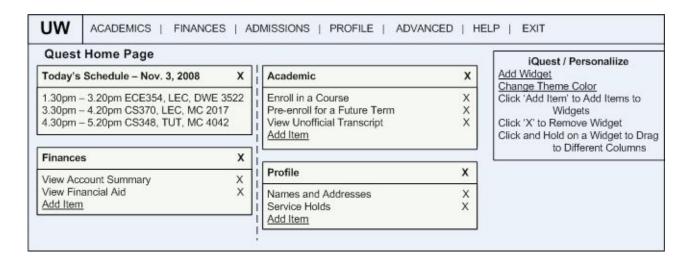


Figure 14 - Personalized Homepage

## 4.1.2 Feature Usage

#### 4.1.2.1 Adding Widgets

To begin adding custom widgets to the personalized Quest homepage:

1. LMC on the **Add Widget** button located on the top right corner of the main Quest account page.

- 2. Upon clicking on the **Add Widget** button a prompt containing a list of widgets appears where one can then be selected and added to the custom homepage.
- 3. After selecting a widget LMC **Add to Left** button to add the selected widget to the left column or LMC **Add to Right** button to add widget to the right column.
- 4. Quest will ask to confirm whether or not the widget should be added to the personalized homepage. LMC **Yes** to continue.

Each widget in the list is accompanied with a description indicating what part of quest you have chosen to display on your personalized homepage.

#### 4.1.2.2 Removing Widgets

To remove a widget from the personalized Quest homepage:

- 1. LMC on the 'X' symbol in the widget that you wish to remove.
- 2. Quest will ask you to confirm whether or not the widget should be deleted. LMC **Yes** to continue.

#### 4.1.2.3 Adding Items to Widgets

To add more items to a particular widget:

- 1. LMC on Add Item option in the selected widget.
- 2. Upon clicking on the **Add Item** option a prompt containing a list of items appear, where one can then be selected and added to the widget.
- 3. A pop-up window appears asking to confirm whether or not the item should be added to the widget. LMC **Yes** to continue.

#### 4.1.2.4 Moving Widgets between Columns

To move a widget to a different column (Left or Right):

- 1. LMC and hold on the header of the widget that needs to be moved to a different column.
- 2. Start dragging the widget by moving the mouse. A dotted line then appears indicating the new place of the widget.
- 3. When the dotted line represents the desired new location of the widget, release the left mouse button.

# 4.2 Enrollment Planner

## 4.2.1 Feature Overview

The idea of the enrollment planner is to allow you to plan your enrollment for all future terms, easily manage prerequisites and co requisites and track the fulfillment status of your degree requirements.

To access this feature LMC **Advanced -> Enrollment Planner** in the menu bar.

The display of the Enrollment Planner feature is shown below in Figure 15. The screen is divided into two sections. On the left the 8 terms from 1A to 4B are shown. On the right, there is a list of the degree requirements.

UW	ACADEMICS   FINANCES	ADMISSIONS   PROFILE   ADVANCED	HELP   EXIT
Enroll	ment Planner		Degree Requirements
1A No electives		1B SCE - PHYS 125	Major: Software Engineering           Science Electives (SCE)         1/3           Linkage Electives (LE)         5/5           Societal Issues         1/1
2A LI	E – SPAN 101	2B LE - STV 202	Communication       1/1         Humanities       2/2         Additional Course       1/1         Advanced Technical Electives       0/5
3A LE – ANTH 101		3B LE - MUSIC 101	Minor: None
	E – MUSIC 101 <u>Remove Course</u> dd Course	4B Add Course	
LEGEN	D: Past Terms Curren	Term Future Terms	

#### Figure 15 - Quest Enrollment Planner

## 4.2.2 Feature Usage

#### 4.2.2.1 Adding courses

To add a course to a specific term:

- 1. Move the mouse pointer to the section of the screen that corresponds to the term of interest.
- 2. LMC the Add Course button. [Exception exists]
- 3. Upon clicking the **Add Course** button a prompt containing a course search form appears.

- 4. Use the course search form to select a desired course. Refer to the section on **Enrolling in a Class** for more information.
- Upon course selection, a prompt appears stating whether or not the course satisfies any degree requirements. LMC Yes to finalize course selection. LMC Back to return to the course search form and return to step 4.

#### Exceptions

2.1 You cannot add courses to past terms; hence, the **Add Course** button only appears on future terms.

#### 4.2.2.2 Removing Course

To remove a course from a specific term:

- 1. Move the mouse pointer to the section of the screen that corresponds to the term of interest.
- 2. LMC the **Remove Course** button beside the course of interest.
- 3. Quest will ask to confirm whether or not the select course should be removed from the selected term. LMC **Yes** to proceed.

# 5.0 Troubleshooting and Tips

# 5.1 Troubleshooting

LMC the **Help** tab in the menu bar or press *F1* to be presented with a **Help** page that allows you to search for what you are having trouble with.

# 5.2 Tips

- Navigate using the navigation menu or the toolbar. Avoid the use of Back and Forward buttons on the browser, because you get a lot of dialog boxes asking if you would like to resend information.
- Quest logs you out after 20 minutes, so do not leave it inactive.
- Always save your work in case you get logged out due to inactivity.

# 6.0 Limitations

- The system is available only from 1:00 am to 11:59 pm Eastern Time, Monday, Tuesday, and Thursday through Saturday and 1:00 am to 6:59 am and 8:00 am to 11:59 pm Eastern Time, Wednesdays.
- Some changes take a few days to process or show up on Quest due to administrative policies such as approvals and sign-offs.
- Access to different functionalities of Quest depend on the user's access level