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The DegreeWorks Student Educational Planner allows students and advisors to create, view, and save course plans.

Creating a Plan from Scratch

You must select a student in DegreeWorks to start a plan. Before creating a plan, be sure the student's academic goals are as accurate as possible in Banner® and that the student's Banner® data and audit are up-to-date.

1. **Click on the Plans Tab:** When prompted, click the **Blank Plan** button



2. **Name and Activate the Plan:** Add the Description of the plan. Then check the **Active** box. (The **Plan Type** is optional and may be helpful for some special programs/students.)

3. **Add a Term:** Add a term to the plan by clicking on the + button to the far right of the Description then select a term from the list.

4. **Add a Course to a Term:** To see more information about any course after it is added to the plan, click the blue circle with an **i** to the right of the course.
- The **Critical** checkbox can be used to designate courses that **MUST** be completed during the planned term for the student to stay on-track toward graduation. Critical requirements that are not completed will appear “off-track” once the term has begun.
- a. **From the Audit/Still Needed list:** There are two different panes to the right of the plan: Still Needed and Courses. The Still Needed pane contains the remaining requirements from the student’s Degree Works™ audit, organized by the audit blocks. To expand a block and view the remaining requirements, click on the arrow to the left of the block title.

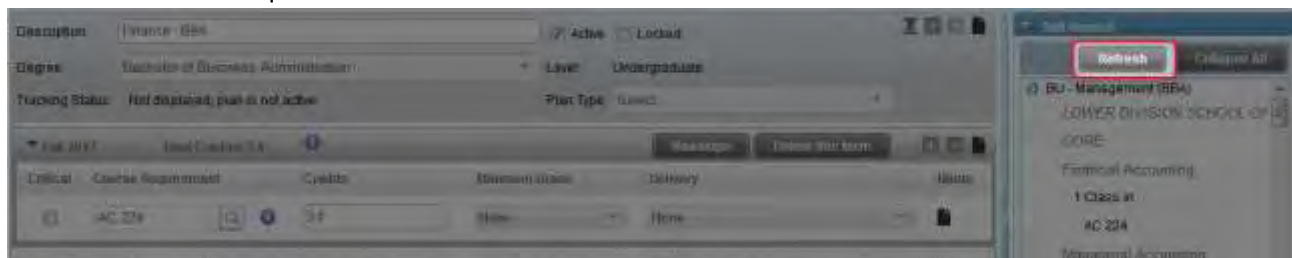


Then drag the course into the grey bar of the term when the course is to be completed.

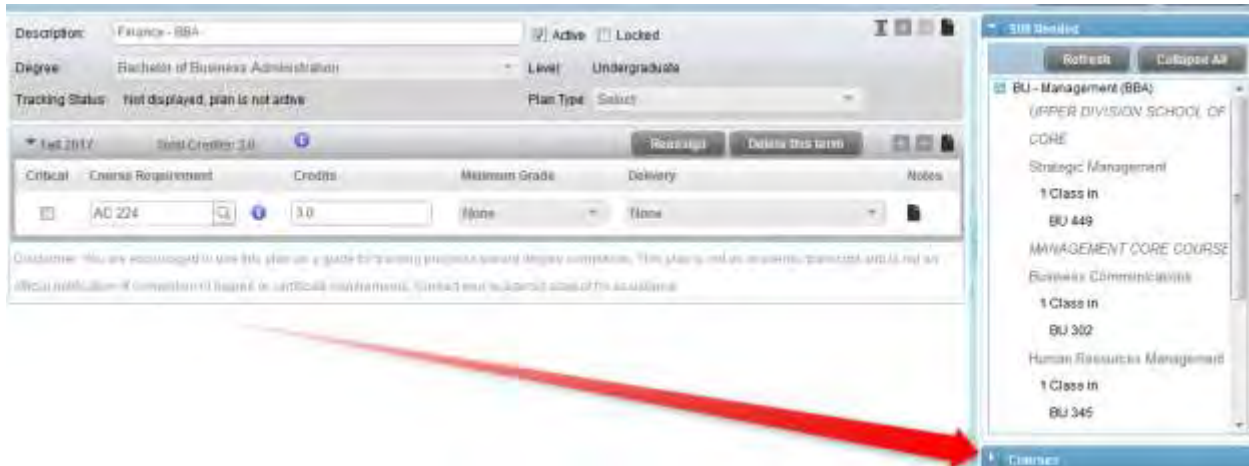


(The credits will default from the course catalog once the course is added to a term.)

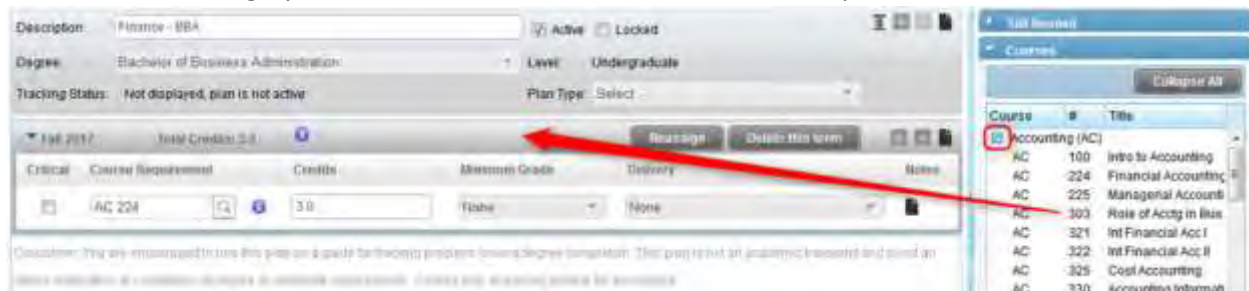
As you add courses from the Still Needed list, click on the Refresh button to remove the planned course from the Still Needed list. **NOTE:** This will not be the case for any unselected choice requirements.



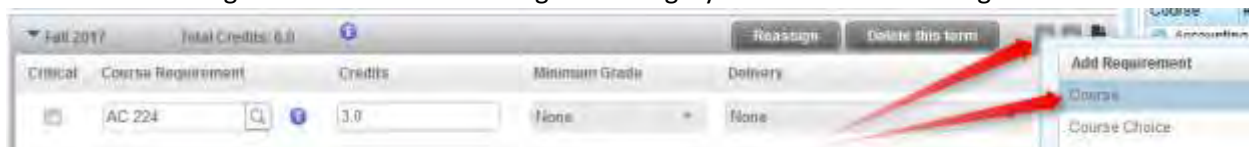
- b. **Add a Course from the Catalog:** Similarly, you can add a course from the **Courses** (course catalog) pane. Click the arrow to the left of **Courses** (lower right of screen)



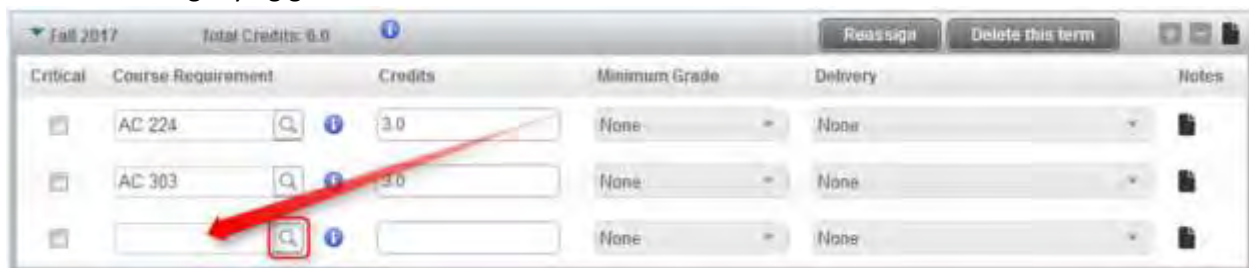
Click the arrow to the left of the subject code to find a course and drag the course into the grey bar of the term when the course is to be completed.



- c. **Add a Course Using the Add Requirement Menu:** You can also add a course to a term by clicking the + button to the far right on the grey term bar and selecting **Course** from the list.



Either type in the course ID or searching for a course in the catalog. (Courses typed in free hand will be validated against the Catalog.) To initiate a catalog search, click on the magnifying glass.



You can search on the course ID or title.

Course	Title
	Accounting
AC 110	Intro to Accounting
AC 124	Financial Accounting
AC 225	Managerial Accounting

5. **Delete a Course from a Term:** Select the course by clicking anywhere in its line and click the – button to the far right on the grey term bar.

Critical	Course Requirement	Credits	Minimum Grade	Delivery	Notes
<input type="checkbox"/>	AC 224	3.0	None	None	
<input type="checkbox"/>	AC 303	3.0	None	None	
<input type="checkbox"/>			None	None	

6. **Add a Choice of Courses:** Click the + button to the far right on the grey term bar and selecting **Course Choice** from the list.

Critical	Course Requirement	Credits	Minimum Grade	Delivery	Notes
<input type="checkbox"/>	AC 224	3.0	None	None	

Click in the Choice Requirement box. Add a choice by typing in the ID or searching the catalog. To insert an OR condition, click on the **Add another option** button.

Course	Attribute	Course/Lab	Attribute
AC 325	None		

Add the next choice by typing in the ID or searching the catalog.

If you would like to add a series of courses (a linked course, lecture/lab, or an AND condition), add the next option using the plus icon to the right of the first part of the link. (Choice requirements may only contain up to two linked courses in a single line; however, there is not a limit on OR conditions.)

Course	Attribute	Course/Lab	Attribute
BU 259	None		

Courses added as a Choice requirement will not be removed from the Still Needed list or appear in the audit unless a specific course is chosen. To select a course from a Choice, click on the radio button next to the course.

Course	Attribute	Course/Lab	Attribute
<input checked="" type="radio"/> AC 325	None		
<input type="radio"/> AC 330	None		

Buttons: Add another option, Select item, Done

Click the **Done** button when you are finished adding choices.

7. **Add a GPA Requirement:** Click the + button to the far right on the grey term bar and selecting **GPA** from the list. (The GPA requirement will be tracked and is typically a critical requirement beyond the first term.)

Critical	Course Requirement	Credits	Minimum Grade	Delivery
<input type="checkbox"/>	AC 224	3.0	None	None
<input type="checkbox"/>	AC 303	3.0	None	None

Buttons: Reassign, Delete this term

Dropdown menu options: Add Requirement, Course, Course Choice, GPA, Placeholder

Fill in as needed.

8. **Add a Test Score:** Click the + button to the far right on the grey term bar and selecting **Test Score** from the list. Test scores must be on the student's record in Banner to be considered on-track, with the appropriate score.

Critical	Choice Requirement	Minimum Credits	Minimum Grade	Delivery
<input type="checkbox"/>	Selected: AC 325		None	None

Buttons: Reassign, Delete this term

Dropdown menu options: Add Requirement, Course, Course Choice, GPA, Placeholder, Test Scores

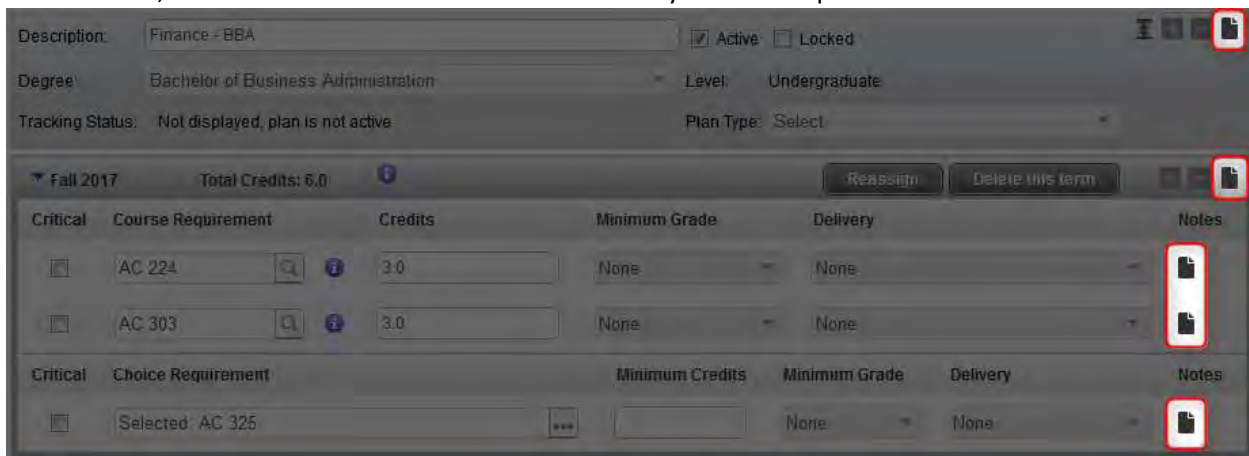
Fill in as needed.

9. **Add a Placeholder to the Plan:** Click the + button to the far right on the grey term bar and selecting **Placeholder** from the list.

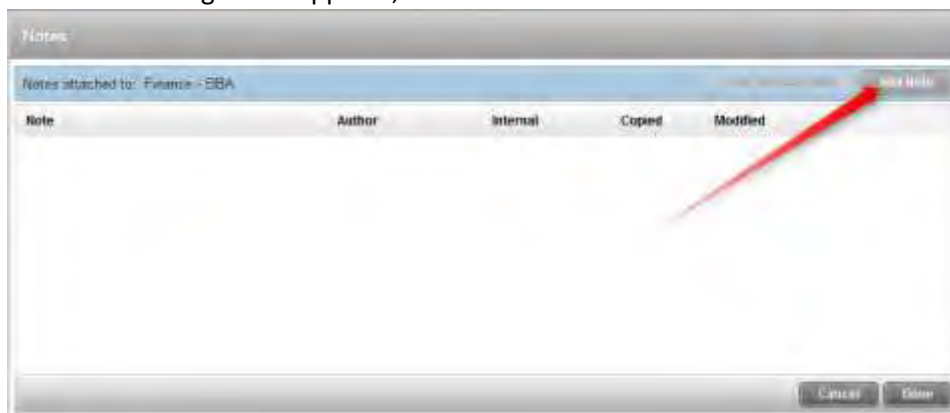


A **Value** for the Placeholder is required. Units are not associated with a placeholder and will not impact the Total Units for each term. A placeholder is strictly informational only.

10. **Plan Notes:** Notes may be added to the plan, a plan term, or a plan requirement. To add a note, click on the **Note** button next to the item you want to place a note on.

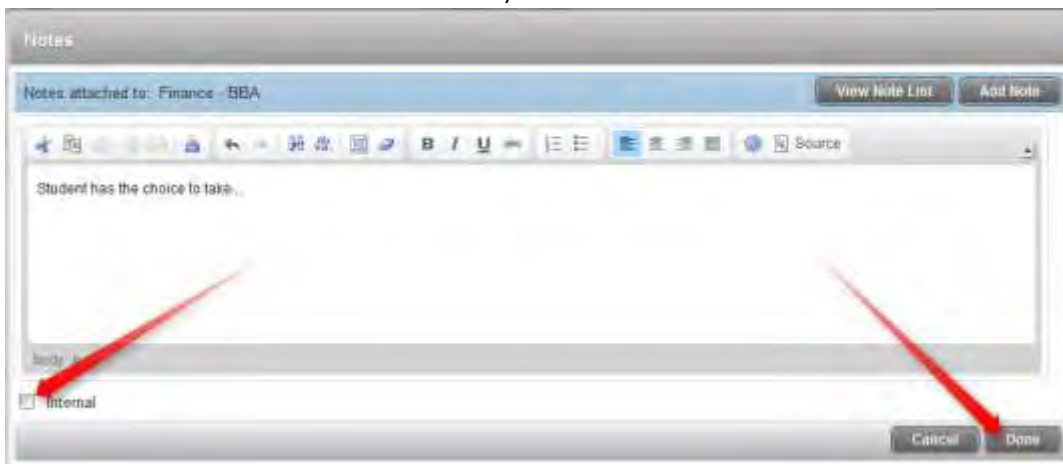


Once the Note light box appears, click on the Add Note button.

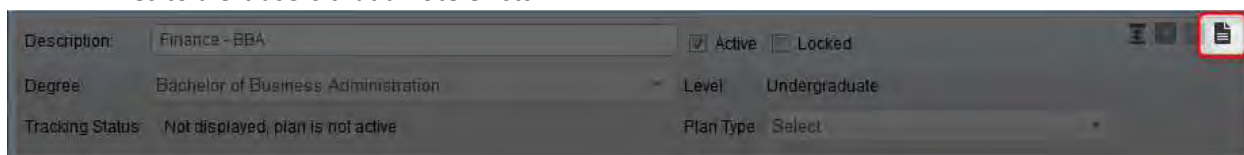


Type the note then click the **Done** button

To make the note **NOT** viewable to the student, check the **Internal** box. (You may need to re-size the notes window to see the Internal box.)



Once the note has been entered, the note icon will change from solid black to black with white lines to alert users that a note exists.



11. [Review the Student Audit](#): Save your plan by clicking on the Save button at the bottom right. Next, click on the **Audit** button (to the left of the Save button) to review the student's DegreeWorks™ audit with the planned courses in place. The planner audit is temporary and will not make any requirements complete on the student's main audit/worksheet. This temporary audit does not include unselected choice requirements, including wildcards with attributes for General Education.

Plan Audit						
<input checked="" type="checkbox"/>	Production & Operations Management	BU 347	Prod & Oper Mgmt	C	3	Spring 2016
<input checked="" type="checkbox"/>	Principles of Marketing	BU 360	Principles of Marketing	C	3	Fall 2015
<input checked="" type="checkbox"/>	Business Finance	BU 381	Business Finance	A	3	Spring 2016
<input type="checkbox"/>	Strategic Management	BU 449	Strategic Management	REG	(3)	Spring 2017
<input checked="" type="checkbox"/>	International Business, Economics or Finance	BU 355	International Business	A	3	Spring 2016
MANAGEMENT CORE COURSES						
<input type="checkbox"/>	Business Communications	BU 302	Business Communications	PLAN	(3)	Fall 2017
<input type="checkbox"/>	Human Resources Management	BU 345	Human Resources Management	REG	(3)	Spring 2017
<input type="checkbox"/>	Organizational Behavior	BU 346	Organizational Behavior	REG	(3)	Spring 2017
<input type="checkbox"/>	Labor Economics	EC 341	Labor Economics	REG	(3)	Spring 2017
UPPER DIVISION ELECTIVES IN ACCOUNTING, ECONOMICS AND/OR BUSINESS						
<input checked="" type="checkbox"/>	Select 12 Credits of Upper Division Business	BU 305	Contemp Information Systems	A	3	Fall 2016
<input checked="" type="checkbox"/>		BU 374	Princ of Risk & Insurance	A	3	Fall 2016

12. **Lock the Plan:** Check the **Locked** box to approve the plan so that other users know that the plan has been reviewed and approved by an advisor. **Only advisors may lock a plan.** Once locked, students can still access, edit, and save plans, but they must request changes be reviewed by an advisor who will then lock the updated plan when it is approved.

Description: Active Locked

Degree: Level:

Tracking Status: Plan Type:

13. **Plan Tracking:** Plan tracking allows users to determine if a student is meeting his or her goals and milestones each semester. **The plan has three levels of tracking status: Plan status, Term status, and Requirement status.** All requirements, except placeholders, will show a status once the term has begun: on-track, off-track, and warning. However, only Critical requirements will impact the tracking status. **On-track** designates the student has met the requirement (in the past or in-progress) regardless of the Critical indicator. **Off-track** designates which Critical requirements the student has not successfully completed (not taken, failed, withdrawn, not completed, etc.). **Warning** designates non-Critical requirements that are not completed. Again, only Critical requirements will make a term or plan off-track. Terms that have not started (based on the student's active term in Banner) or have **no** critical requirements will not be tracked. Once a plan is locked tracking will be initiated, if appropriate.

Description: Active Locked

Degree: Level:

Tracking Status: Plan Type:

Off-Track Total Credits: 14.0

Tracking	Critical	Course Requirement	Credits	Minimum Grade	Delivery	Notes
Off-Track	<input checked="" type="checkbox"/>	KN 250	2.0	None	None	
On-Track	<input checked="" type="checkbox"/>	EN 101	3.0	C	None	
Warning	<input type="checkbox"/>	AR 103	3.0	None	On-Campus Course	
On-Track	<input type="checkbox"/>	MU 100	3.0	None	None	
Tracking	Critical	Choice Requirement	Minimum Ct	Minimum Gr	Delivery	Notes
On-Track	<input checked="" type="checkbox"/>	MA 112 or MA 116	3.0	C	None	
Tracking	Critical	GPA Requirement	Major	Minimum	Class List	Notes
On-Track	<input checked="" type="checkbox"/>	Overall Degree	Select	2.00		

Creating a Plan from a Template

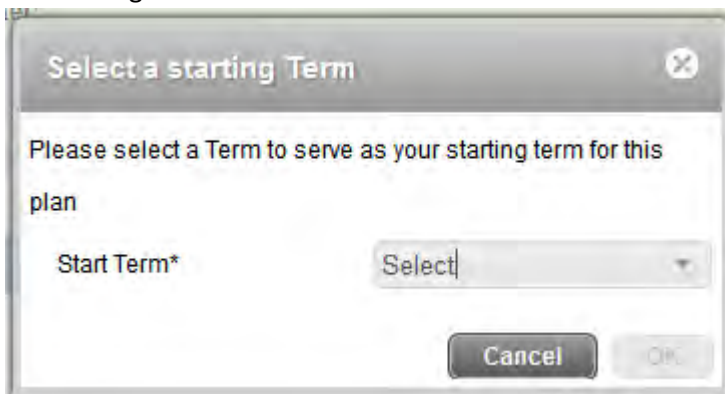
1. **Click on the Plans Tab:** When prompted, click the **Select Template** button



2. **Search for the Template:** You can perform a search for the template by Description or click the Advanced Search button for more options. **Typing "Criminal Justice"** into the **search box** and pressing **Enter** or clicking **Go** will return all the templates that include "Criminal Justice" in the description.

Description	Level	Program	Catalog Year	Term Scheme	ID	Who	What	Modified
Criminal Justice - AA	UG	CJ	2010	L_SEM	T0000005	Wilson, W	NOT SET	2/23/17
Criminal Justice - Corrections - BS	UG	CR	2010	S_SEM	T0000021	Wilson, W	NOT SET	2/23/17
Criminal Justice - Forensic Investigation - BS	UG	FOR	2010	S_SEM	T0000022	Wilson, W	NOT SET	3/9/17
Criminal Justice - Law Enforcement - BS	UG	LE	2010	S_SEM	T0000023	Wilson, W	NOT SET	3/9/17
Criminal Justice - Security Administration - BS	UG	SE	2010	S_SEM	T0000024	Wilson, W	NOT SET	3/9/17

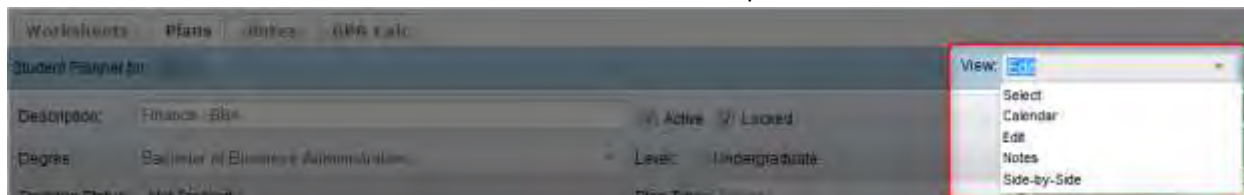
3. **Select a Template:** Once you find the applicable template, **double-click** it or click on the row to select it then click the Open button.
4. **Select a Starting Term:** **Choose a starting term** for the template to take effect and click **OK**.
NOTE: If the student has already started taking courses in this field, you may want to back-date the starting Term to reflect when the student started.



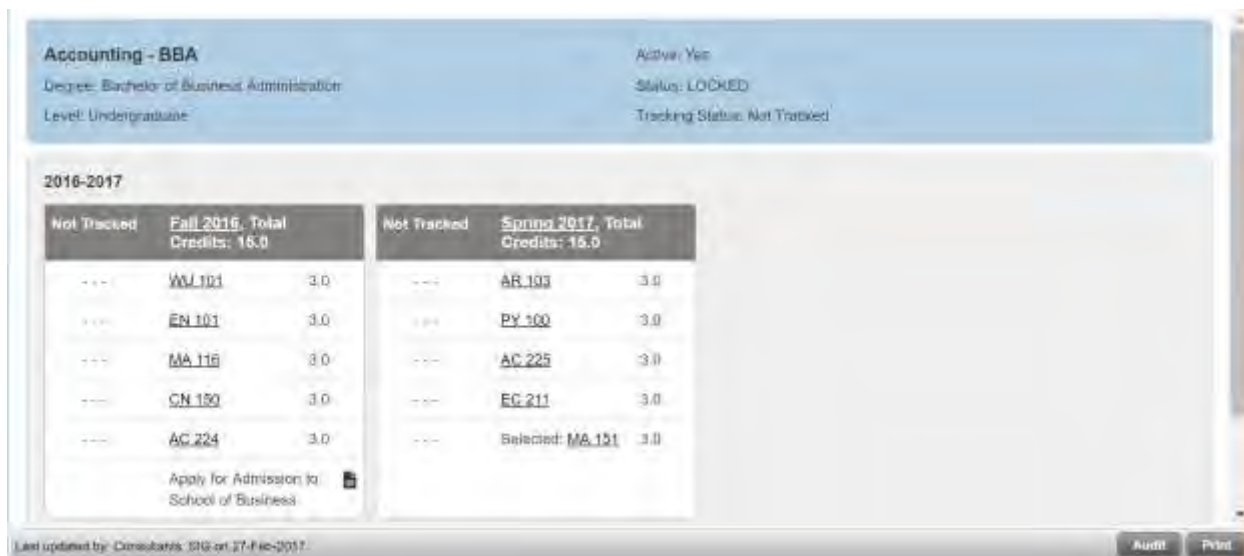
5. **Edit as Needed and Finalize:** Now, you can edit and finalize the plan as described in the "Creating a Plan from Scratch" section of this document.

Alternate Plan Views

Once a plan has been saved and a user clicks on the Plans tab, the default Calendar view will appear. To load another view select a different format from the **View** drop down menu.



1. **Calendar (Default) View:** Allows the user to view a plan in a view-only calendar presentation that is suitable for printing. For requirements in the Calendar view, Critical will be denoted by an asterisk. **Course** requirements will display with the Course ID and Credits, and hovering over the course will display the course Title. **Placeholder** requirements will display the Placeholder Type Description on the view, and hovering over the Placeholder Type Description will display the Placeholder Value.



When notes exist on a plan, term, or requirement, an icon will display to the right of that item. Hovering over this icon will show a note preview and clicking on this icon will open the Notes window. Note text will not be included when printing the Calendar view.

The Term Literal, Course and **selected** Choice requirements are hyperlinks and clicking on these will open the Course Link window.

2. **Notes View:** The Notes view allows the user to view a plan in a comprehensive view-only presentation that is suitable for printing, with or without notes appearing. The Notes view will automatically appear with notes expanded but they can be collapsed. When collapsed, hovering over the notes icon will show a note preview, and clicking on this icon will open the Notes window.

Requirements marked as critical will be denoted by an asterisk. **Course** requirements will display the Course ID and Credits, and hovering over the course will display the Title. **Placeholder**

requirements will display the Placeholder Type Description and Placeholder Value. The Term Literal, Course and **selected** Choice requirements are hyperlinks and clicking on these will open the Course Link window.

Accounting - BBA
 Degree: Bachelor of Business Administration
 Level: Undergraduate
 Active: Yes
 Status: LOCKED
 Testing Status: ---

Fall 2016, Total Credits: 15.0

Term	Choice	Course Requirement	Minimum Credits	Credits	Status
---	---	WU 101	3.0	3.0	
---	---	EN 101	3.0	3.0	
---	---	MA 116	3.0	3.0	
---	---	EN 150	3.0	3.0	
---	---	AC 224	3.0	3.0	
Summary	Overall	GPA Requirement	Minimum GPA	2.000	Met
Summary	Overall	Prerequisite Requirement	Apply for Admission to School of Business	See note for more details	

Spring 2017, Total Credits: 15.0

TERM note example

Term	Choice	Course Requirement	Minimum Credits	Credits	Status
---	---	AH 103	3.0	3.0	
---	---	PY 100	3.0	3.0	
---	---	AC 225	3.0	3.0	
---	---	EC 211	3.0	3.0	
Summary	Overall	GPA Requirement	Minimum GPA	2.000	Met
Summary	Overall	Field Exam Requirement	School of Business Major Field Exam	1	Met

Disclaimer: You are encouraged to use this degree plan as a guide for tracking your progress toward completion of the above requirements. Your academic advisor or the Registrar's Office may be contacted for assistance in interpreting this report. This plan is not your academic transcript and it is not official notification of completion of degree or certificate requirements. Please contact the Registrar's Office regarding this degree plan, your official degree/certificate completion status, or to obtain a copy of your academic transcript.

ad updated by Consultant, DW on 11-Feb-2017

Audit Print

3. **Side-By-Side View:** The Side-by-Side view allows the user to view a plan and the planner audit side by side. When initially loading the Audit view, a planner audit is generated against the selected plan. The Audit view allows for light editing of the plan – courses can be drag and dropped from the audit into the plan, as well as moved from one term to another on the plan; however, requirements **may not be deleted** once added to the plan using the Audit view. The Edit view should be used for advanced editing of the plan.

In the Audit view, only actual courses and Course requirements can be moved – course rules with wildcards, ranges or attributes cannot be moved from the audit to the plan, and Choice, Placeholder requirements cannot be moved from term-to-term on the plan. To move a course in the Audit view, hover over the course – your cursor will change to a hand. Click on the course

and move it to the desired term and release. Click Refresh Audit to rerun the planner audit after making changes. Click Save when done to keep your changes.

New Planner Worksheet W000000 as of 03/23/2017 at 21:17

Student: [Blank]
 Level: [Blank]
 ID: [Blank]
 Degree: Bachelor of Business Administration
 Classification: Freshman
 College: School of Business
 Advisor: [Blank]
 Term: Accounting
 Overall GPA: 0.00
 Notes: [Blank]

Requirements: 81%
 Credits: 24%

Bachelor of Business Administration
 Catalog Year: 2016-2017
 GPA: 0.00
 Credits Applied: 30
 Credits Required: 124
 You have completed or have in progress 30

Accounting - BBA Active: Yes
 Degree: Bachelor of Business Administration
 Status: LOCKED
 Level: Undergraduate
 Tracking Status: Not Tracked

2016-2017

Fall 2016, Total Credits: 15.0			Spring 2017, Total Credits: 15.0		
Not Tracked			Not Tracked		
---	WU 101	3.0	---	AR 103	3.0
---	EN 101	3.0	---	PY 100	3.0
---	MA 116	3.0	---	AC 225	3.0
---	CN 150	3.0	---	EC 211	3.0
---	AC 224	3.0	---	Selected: MA 151	3.0

Apply for Admission to School of Business

List updated by: Consultants, SIO on 27-Feb-2017

Refresh Audit Print

4. **Edit View:** Available to all users. This is the view used when creating a plan from scratch and is meant for creating and editing a student's plan. Both advisors and students have access to the Edit view.

Viewing Saved Plans

To view all the plans that have been saved to a student, use the following steps.

1. Click on the **Plans** tab
2. Click the **View Plan List** button (upper right)

Worksheets Plans Notes GPA Calc

Student Planner for: [Blank] View: Calendar View Plan List New Plan

Finance - BBA Active: Yes
 Degree: Bachelor of Business Administration
 Status: LOCKED

3. Double-click a plan to view it

Editing a Saved and Locked Plan

If you would like to retain a copy a plan before and after you edit it, you must use the following steps and the Save As button.

1. **Navigate to the Edit View:** If you are not in the Edit view, select it from the View drop down list.
2. **Unlock the Current Plan:** Before you begin editing the plan, uncheck the Locked check box, then click on the **Save** button (not Save As).
3. **Edit the Plan:** Edit the plan as needed, then check the **Locked** check box and click the **Save As** button. This will make the newly edited plan the Active and Locked current plan.