

# **DEGREE WORKS STUDENT EDUCATIONAL PLANNER TRAINING MANUAL**

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SEPTEMBER 2022

## **CONTACT**

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## Introduction to Degree Works Student Educational Planner

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The Degree Works Student Educational Planner (SEP) is an advising tool that students and advisors can use to map out a clear pathway for timely degree completion. Advising plans created in SEP will show students the required courses within their program(s) and a recommended timeline of when they should be completed.



## Objectives

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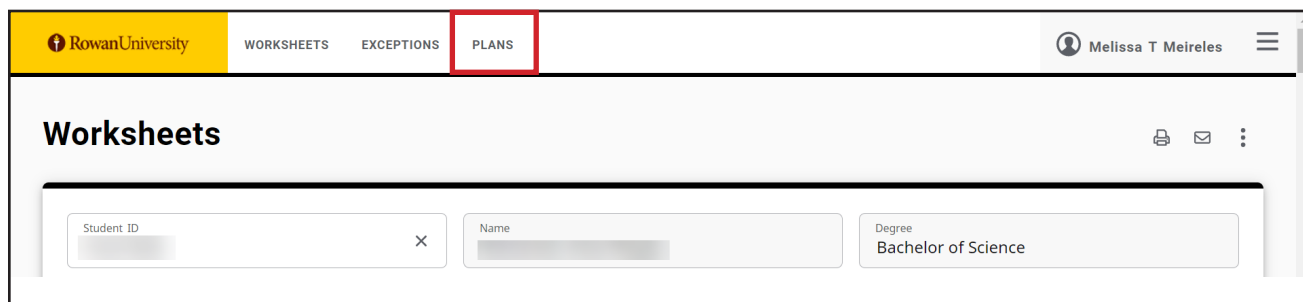
By the end of this manual the user will be able to:

1. Create a Blank Plan
2. Create a Plan from a Template
3. Add to and Modify Plans

# PLANS

## ACCESS PLANS

1. Access Degree Works through Self-Service Banner.
2. Select **Plans** at the top of the Degree Works Responsive Dashboard.



The screenshot shows the top navigation bar of the Degree Works Responsive Dashboard. The 'PLANS' tab is highlighted with a red box. Below the navigation bar, the 'Worksheets' section is visible, featuring search filters for Student ID, Name, and Degree (Bachelor of Science).

3. In the Plan List block, you will see any plans that were previously created.



The screenshot shows the 'Plan List' block. A table displays the following data:

Description	Active	Modified ↓	Who	Degree	Level	Status
<a href="#">Test Plan</a>	Yes	06/27/2022	Meireles, Melissa T	BS	UG	Not locked

A red box highlights the first row of the table. The table also includes a 'NEW PLAN' button in the top right corner and a pagination bar at the bottom showing 'Page 1 of 1' and 'Total results: 1'.

## PLAN TYPES

There are two different options when creating a new plan, Blank Plans and Templates.

**Blank Plans** allow you to build a customized plan from scratch.

**Templates** allow you to select a pre-defined template with courses and semesters already added.

Note: you can still edit a plan if selected from a Template.

# PLANS

## CREATE A BLANK PLAN

1. Select **New Plan** from the Plan List Block.

Plan List

Description	Active	Modified ↓	Who	Degree	Level	Status
<a href="#">Test Plan</a>	Yes	06/27/2022	Meireles, Melissa T	BS	UG	Not locked

Page 1 of 1 Total results: 1

2. Select **Blank Plan**.

Create Plan

Would you like to create a plan based on a template or would you like to start from scratch?

[SELECT TEMPLATE](#) [BLANK PLAN](#)

3. Use the drop-down to select the **starting term** for the plan. Select **Submit**.

Select a Starting Term

Please select a term to serve as your starting term for this plan

Select term \*

[CANCEL](#) [SUBMIT](#)

4. Enter the name of the plan in the Description field.

Edit Plan

Description \*

Degree  
Bachelor of Arts

☐ Active

[CANCEL](#) [SAVE](#)

5. If the student has multiple programs of study, you will see the Degree drop-down. Select the **Degree** you are creating the plan for.
6. Select **Active** if you would like to track the student's progress.
7. Select **Save**.
8. The Blank Plan will appear. Scroll down to begin adding to the plan. You will see the starting term has been added. Skip to page 8 in the manual.

# PLANS

## CREATE A PLAN FROM A TEMPLATE

1. Select **New Plan** from the Plan List Block.

**Plan List**

NEW PLAN

Description	Active	Modified ↓	Who	Degree	Level	Status
<a href="#">Test Plan</a>	Yes	06/27/2022	Meireles, Melissa T	BS	UG	Not locked

Page 1 of 1

Total results: 1

2. Choose **Select Template**.

**Create Plan**

Would you like to create a plan based on a template or would you like to start from scratch?

SELECT TEMPLATE

BLANK PLAN

3. The list of plans will appear. The “Term Scheme” column states the number of terms that have been planned and the term that the plan starts. Use the drop-down to select the **starting term** for the plan.

**Create plan from template**

Select starting term \*

▼

Search templates

Description ↑	Level	Term scheme	Who	What	Modified
<a href="#">Accounting, BS. Fall Start. Catalog 2021 to Present</a>	UG	8_SEMESTERS_FALL_START____	916252890	DASH	5/24/2022
<a href="#">Accounting, BS. Spring Start. Catalog 2021 to Present</a>	UG	8_SEMESTERS_SPRING_START____	916252890	DASH	5/24/2022
<a href="#">Biological Science, BA. Fall Start. Catalog 2021 to Present</a>	UG	8_SEMESTERS_FALL_START____	916062420	DASH	5/26/2022

4. Use the Search Templates field to narrow down the list or select the **name of the template** from the list. Note: The starting term must match the term start in the “Term Scheme” column. If they do not match you will receive an error.

Select starting term \*

Fall 2021

▼

Search templates

Description ↑	Level	Term scheme	Who	What	Modified
<a href="#">Accounting, BS. Fall Start. Catalog 2021 to Present</a>	UG	8_SEMESTERS_FALL_START____	916252890	DASH	5/24/2022
<a href="#">Accounting, BS. Spring Start. Catalog 2021 to Present</a>	UG	8_SEMESTERS_SPRING_START____	916252890	DASH	5/24/2022
<a href="#">Biological Science, BA. Fall Start. Catalog 2021 to Present</a>	UG	8_SEMESTERS_FALL_START____	916062420	DASH	5/26/2022

# PLANS

5. The plan template will appear. Select the **pencil icon** to edit the plan's description.

6. If needed, modify the name of the plan in the Description field.

7. If the student has multiple programs of study, you will see the Degree drop-down. Select the **Degree** you are creating the plan for.
8. Select **Active** if you would like to track the student's progress.
9. Select **Save**.

## ADD A TERM

You can add other terms to the plan to continue mapping out the student's coursework.

1. Select **Add Term** on the right side of the screen.

The screenshot shows a web interface for managing a plan. On the left, there is a sidebar with a menu icon and a list of categories: 'Still Needed', 'Rowan Experience', and 'Broad-based Literature'. The main area displays a plan for 'Fall 2022' with a status of 'NOT TRACKED' and 'Credits: 0.0'. A red box highlights the 'ADD TERM' button in the top right corner of the main area.

2. Use the drop-down to select the **term** for the plan. Select **Add**.

The screenshot shows a modal dialog titled 'Add Term'. It contains a text input field labeled 'Select term \*' with a drop-down arrow on the right. Below the input field are two buttons: 'CANCEL' and 'ADD'. A red box highlights the 'ADD' button.

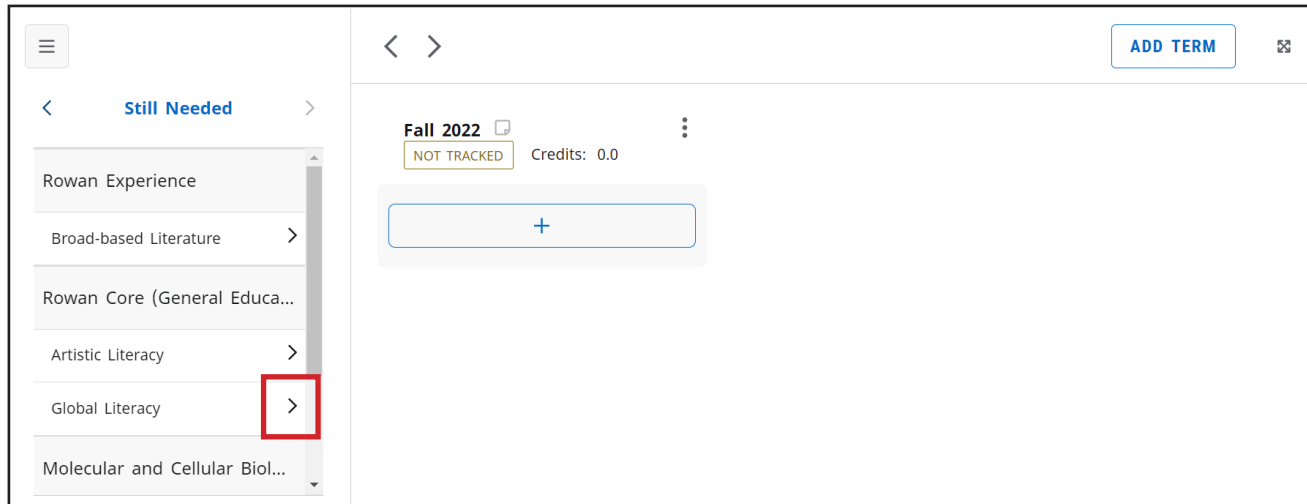
3. The term will appear on the plan. Repeat the process to add more terms.

The screenshot shows the same web interface as before, but now with two terms added to the plan: 'Fall 2022' and 'Spring 2023'. Both terms have a status of 'NOT TRACKED' and 'Credits: 0.0'. The 'ADD TERM' button is still visible in the top right corner.

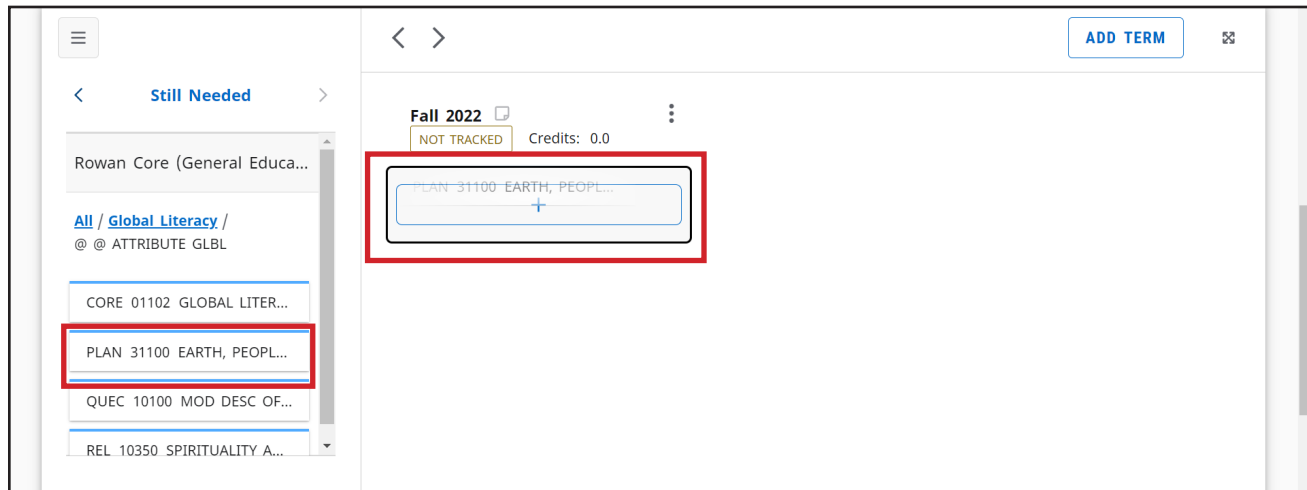


## ADD A COURSE THAT IS STILL NEEDED

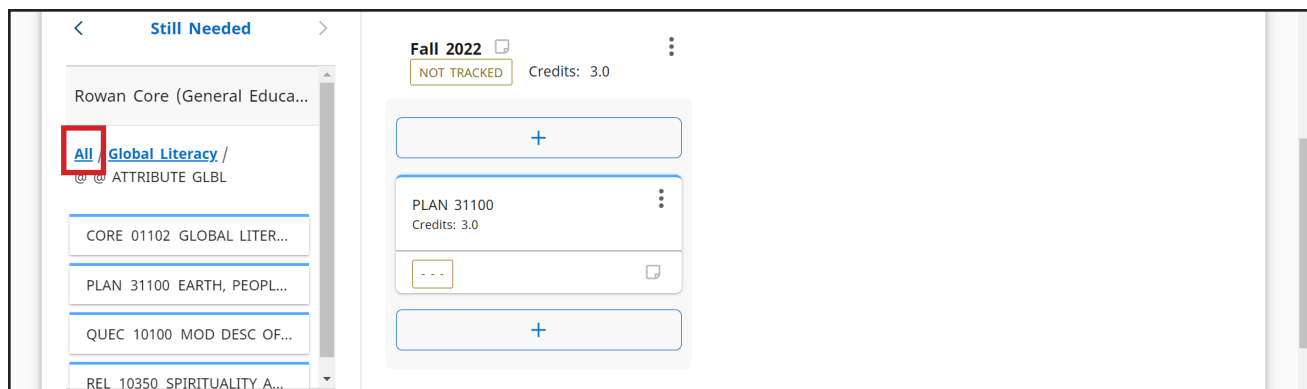
1. On the left side of the screen you will see the categories for the degree requirements that are still needed. Select the arrow next to the category to view the courses.



2. Select the **course** and drag it to the + icon under the name of the appropriate term.



3. You will see the course listed under the term. Select **All** to return to the full list of categories for the requirements that are still needed.



## ADD A CHOICE REQUIREMENT

A choice requirement is used when a student can choose from multiple courses (ex. this course OR that course). A choice requirement is also used when a course must be paired with another course (ex. this course AND that course). Finally, a choice requirement is used to indicate a free elective (@ @) or other course with a “wildcard” symbol (@).

1. On the left side of the screen you will see the Still Needed section. Select the **left arrow**.

2. Select the **+** icon next to Choice.

3. Use the term drop-down to select the appropriate **term**.

4. Add a course by searching course name or subject/number. You can also add a requirement based off of Attribute (if applicable).

5. Select **Add** if you need to add another course.
6. Optional: Enter the number of credits, minimum grade, select the campus and delivery.
7. Select **Save**.

## ADD A PLACEHOLDER

A placeholder is used for elective credits, internships, etc. The placeholders have been added by the Degree Works administrators. If you would like to request an additional placeholder type, please email [degreeworks@rowan.edu](mailto:degreeworks@rowan.edu).

1. From the Requirements section, select the **+** icon next to Placeholder.

2. Use the drop-downs to select the **term** and **placeholder**.

3. Enter the **value**. The value is the note that will display to the student on the plan. Note: Placeholders do not count toward the credit total and will not check off requirements on the plan. Any number placed in the value field will not be added to the term's total credits.
4. Select **Save**.

## ADD MULTIPLE COURSES

1. Select the **+** icon under the name of the appropriate term.

The screenshot shows a user interface for adding courses. On the left, a sidebar lists categories: 'Rowan Experience', 'Broad-based Literature', and 'Rowan Core (General Educa...'. The main area is titled 'Still Needed' and shows a term selection for 'Fall 2022' with a 'NOT TRACKED' status and 'Credits: 0.0'. A red box highlights a '+' button located below the term selection.

2. The degree requirements that are still needed are listed. Browse through the list or use the Subjects drop-down and Search by title field to search for a specific course. You can also select **Courses** if you would like to search from all courses.

The screenshot shows a dialog box titled 'Add requirements to Fall 2022'. It features a 'Subjects' section with a red box highlighting a search area. This area includes a 'Courses' tab and a 'Still needed' tab. Below these tabs are a 'Subjects' dropdown menu and a 'Search by title' search bar. The main list of requirements includes 'Rowan Experience', 'Broad-based Literature - 3 Credits in', and '@ @ ATTRIBUTE LIT'.

3. You may need to select the **down arrow** to expand a section. Select the **check boxes for all of the courses** you would like to add to the plan.

The screenshot shows a list of course requirements. A red box highlights a down arrow next to the '@ @ ATTRIBUTE GLBL' section. Below this, the 'Molecular and Cellular Biology (2700)' section is expanded, showing 'MID-LEVEL COURSES'. Under this, 'Organic Chemistry II for BMS - 1 Class in' is listed. A table of courses follows, with a red box highlighting a checkbox next to the 'Course' entry for 'CHEM 07203'.

Course	Title	Credits
<input type="checkbox"/> Course CHEM 07203	ORG CHEM II - BIOMED SCIENCES	4
<input type="checkbox"/> Course CHEM 07201	ORGANIC CHEMISTRY II	4

# PLANS

4. Scroll to the bottom of the window. You will see the courses you have selected. Select the **X** next to the course if you no longer want to add it to the plan. Select **Add to Plan**.

<input type="checkbox"/>	Course	MCB 01481	Title	CELLULAR/MOLECULAR NEUROSCIENC	Credits	3
<input type="checkbox"/>	Course	PSY 10315	Title	PHYSIOLOGICAL PSYCHOLOGY	Credits	3

CHEM 07201 X BINF 07310 X MCB 01201 X PLAN 31100 X

CANCEL ADD TO PLAN

5. All of the courses will be added under the appropriate term.

## REVIEW PLAN

If a student's plan is active, then the template will track whether the student is on track with the template. Only past courses and courses in a current term will display as on track or off track. Future terms will not be tracked.

Review the plan to determine whether a student's registration is "on-track". Under the course name you will see, "On-track" or "Warning".

**On-track** designates the student has met the requirement.

**Warning** designates the student has not met the requirement (not taken, failed, withdrawn, etc.)

Fall 2021 <input type="checkbox"/>	Spring 2022 <input type="checkbox"/>	Fall 2022 <input type="checkbox"/>
<b>NOT TRACKED</b> Credits: 16.0	<b>NOT TRACKED</b> Credits: 15.0	<b>NOT TRACKED</b> Credits: 12.0
<div><div>+</div><div>ECON 04102 Credits: 3.0 <b>ON-TRACK</b></div><div>BUS 01100 Credits: 1.0 <b>ON-TRACK</b></div><div>ACC 03150 Credits: 3.0 <b>ON-TRACK</b></div><div>MATH 01130 or MATH 03125 Credits: 3.0</div></div>	<div><div>+</div><div>COMP 01112 Credits: 3.0 <b>ON-TRACK</b></div><div>ECON 04101 Credits: 3.0 <b>ON-TRACK</b></div><div>MKT 09200 Credits: 3.0 <b>WARNING</b></div><div>@ @ with LIT Credits: 3.0</div></div>	<div><div>+</div><div>MIS 02234 Credits: 3.0 ---</div><div>ACC 03210 Credits: 3.0 ---</div><div>STAT 02260 Credits: 3.0 ---</div><div>@ @ with ARTL Credits: 3.0</div></div>

# PLANS

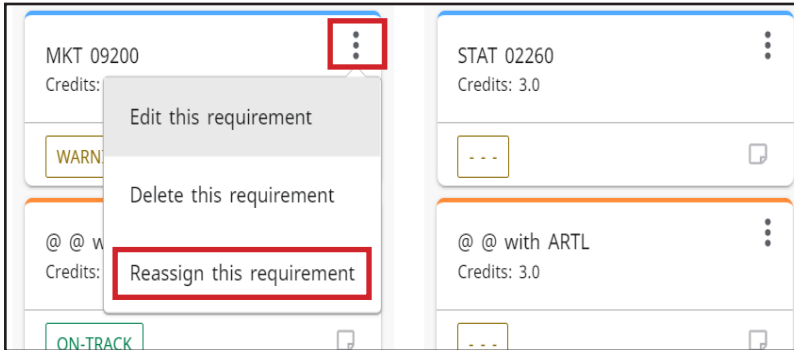
## MODIFY THE PLAN

You may need to make adjustments to the plan you created or the template you chose.

### Reassign Requirements

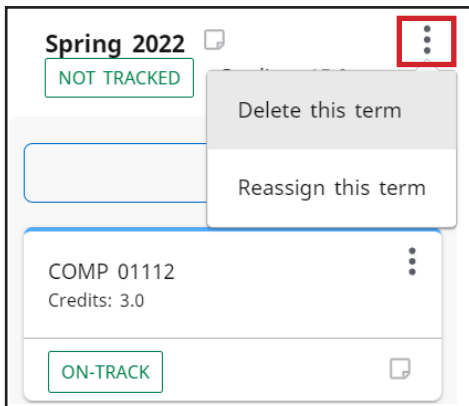
You can move requirements between terms by selecting the requirement, then dragging and dropping it into the appropriate term.

You can also select the **ellipsis** for the requirement then select **Reassign this requirement**.



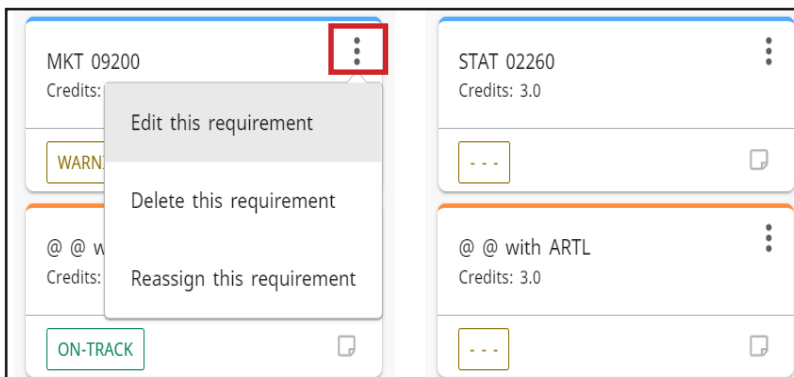
### Reassign or Delete a Term

You can reassign or delete an entire term at once. Select the **ellipsis** for the term then select **Delete this Term or Reassign this term**.



### Edit or Delete Requirements

Select the **ellipsis** for the requirement then select **Edit this requirement or Delete this requirement**.

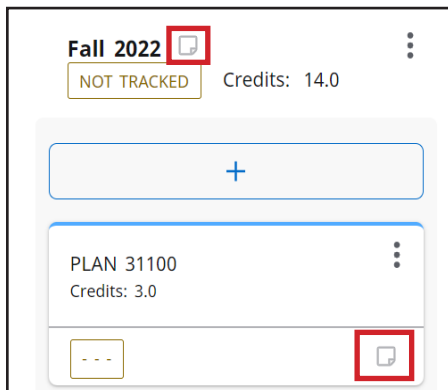


# PLANS

## Add a Note

You can add a note to a plan, a term, or a course.

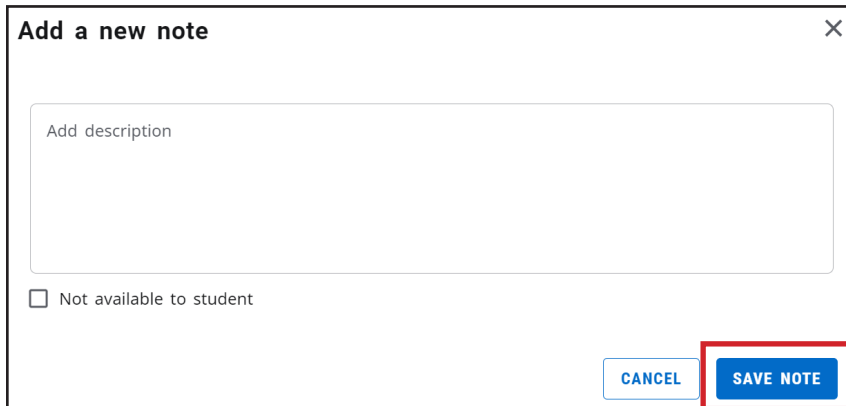
1. Select **note icon**.



2. Select **Add a New Note**.



3. Enter the note in the Description field. Select **Save Note**.



4. Once a note is added the note icon color changes from  gray to  blue on the plan.

## PLANNER AUDIT

The Audit allows you to view the requirements that are satisfied by the plan you created. This differs from the traditional degree audit because it includes the courses a student plans to take, not just the current or past courses they have taken. Note: A choice requirement with the @ symbol will not appear as planned on the Audit View.

1. At the top left corner of the plan, select **Audit**.

2. The Planner Audit will appear. Degree progress shows the percentage of Requirements and Credits fulfilled by the courses taken and planned. Note: Progress will not equal 100% until all of the courses are complete and graded.

3. Review the audit to ensure the plan matches the student's course requirements needed to graduate. Requirements that are in-progress or planned for are denoted by a blue half filled circle. PLAN will be listed under the Grade column and the planned term is listed under the Term column.

	Course	Title	Grade	Credits	Term	Repeated
①	Non-Program Electives					
✓	Intro to Economics - Microeconomics (Satisfies Humanistic Literacy)	ECON 04102	INTRO ECON-MICROECON	B	3	Fall 2020
✓	Intro to Economics - Macroeconomics (Satisfies Humanistic Literacy)	ECON 04101	INTRO ECON-MACROECON	B-	3	Spring 2021
✓	Calc Techniques & Applications or Calc I - Minimum Grade C- (Satisfies Quantitative Literacy)	MATH 03125	CALC TECHNIC/APPLIC	B	3	Spring 2021
①	Statistics I - Minimum Grade C- (Satisfies Quantitative Literacy)	STAT 02260	STATISTICS I	R	(3)	Fall 2022
①	Statistics II	STAT 02261	STATISTICS II	PLAN	(3)	Spring 2023



# PLANS

4. Requirements that have not been completed or planned for are denoted by a red circle. Add these courses when modifying the plan.

✓ Legal Environment of Business	MGT 98242	LEGAL ENVIRONMENT	D	3	Spring 2022
ⓘ Organizational Behavior	MGT 06300	ORGANIZATIONAL BEHAVIOR	PLAN	(3)	Fall 2023
ⓘ Principles of Finance	FIN 04300	PRINCIPLES OF FINANCE	PLAN	(3)	Spring 2024
ⓘ Operations Management	MGT 06305	OPERATIONS MGMT	PLAN	(3)	Fall 2023
○ Business Policy	Still needed:	1 Class in MGT 06402			

5. Review the Additional Courses Applying to Credit Total block. This block lists any courses that are not currently used to fulfill specific degree requirements. Ideally, you do not want the courses that you planned for to appear in this block. If any of your planned courses are applying in this block, please review these courses with your advisor before registering. An exception may be needed or a different course may be more appropriate.

Additional Courses Applying to Credit Total					
Credits applied: 3    Classes applied: 1					
Course	Title	Grade	Credits	Term	Repeated
CHEM 05100	ESSENTIALS OF GEN CHEMISTRY	PLAN	(3)	Spring 2023	

# PLANS


## PRINT VIEW

The Print View condenses the plan and displays the course titles. You can use the print view to either print the plan or save it as a PDF.

1. At the top right corner of the plan, select the **Print Icon**.

### Plans

Data refreshed 09/21/2022 10:28 AM


Print

Student ID
Name
Degree
Bachelor of Science

Advanced search

Level Undergraduate
Classification 1) Freshman
Major Biological Science - UG
Program Biological Science (BS)
College College of Sci & Math
Advisor

Biological Science, BS. Fall Start. Catalog 2021 to Present

PLAN LIST
NEW PLAN

Degree Bachelor of Science
Level Undergraduate
Active Yes
Tracking Status NOT TRACKED

2. The Print View will open in a new tab. You will see all of the semesters and courses you added to the student's plan. Select the **Print Icon** to save the plan as a PDF or to print it.

Student name

Plan Description Biological Science, BS. Fall Start. Catalog 2021 to Present
Tracking Status NOT TRACKED

Active Yes
Last updated:

Level Undergraduate
Classification 1) Freshman
Major Biological Science - UG
Program Biological Science (BS)
College College of Sci & Math
Advisor

Fall 2022	Spring 2023	Fall 2023	Spring 2024	Fall 2024	Spring 2025	Fall 2025
NOT TRACKED	NOT TRACKED	NOT TRACKED	NOT TRACKED	NOT TRACKED	NOT TRACKED	NOT TRACKED
Credits: 16.0	Credits: 15.0	Credits: 19.0	Credits: 8.0	Credits: 11.0	Credits: 7.0	Credits: 9.0
COMP 01105 INTENSIVE COLLEGE COMP I Credits: 4.0 ON-TRACK	BIOL 01104 INTRO EVOL/SCIENTIFIC INQUIRY Credits: 4.0 Minimum grade: C-	STAT 02280 BIOMETRY Credits: 4.0	BIOL 01203 INTRODUCTION TO CELL BIOLOGY Credits: 4.0	PHIL 09369 PHILOSOPHY OF SCIENCE-WI Credits: 3.0	Elective - Biology Upper Level w/LAB 4 Credit upper level Biology w/LAB - refer to DW	Elective - Biology Upper Level 4 Credit upper level Biology - refer to DW
						Nonprogram

# PLANS

3. Use the Destination drop-down menu to select **Save as PDF** or select the **printer name**.

Student name

Plan Description: Biological Sciences, BS, Fall Start, Catalog 2021 to Present

Tracking Status: NOT TRACKED

Active: Yes

Last updated: With, Ada on 09/21/2022

Level: Undergraduate Classification: 1 Freshman Major: Biological Science - US Program: Biological Science (BS) College: College of Sci & Math

Advisor: With, Ada (MAJ) - withad@rowan.edu

Fall 2022	Spring 2023	Fall 2023	Spring 2024	Fall 2024	Spring 2025
<p><span>NOT TRACKED</span> Credits: 16.0</p> <p><b>COMP 01105</b> INTENSIVE COLLEGE COMP I Credits: 4.0 <span>ON-TRACK</span></p> <p><b>INTR 01107</b> ROWAN VS COLLEGE SUCCESS-BS Credits: 2.0 <span>ON-TRACK</span></p> <p><b>[CHEM 04100 and CHEM 04101]</b> Credits: 6.0 <span>ON-TRACK</span></p> <p><b>@ @ with ARTL</b> Credits: 3.0 <span>ON-TRACK</span></p> <p><b>@ @ with GLBL</b> Credits: 3.0 <span>ON-TRACK</span></p>	<p><span>NOT TRACKED</span> Credits: 15.0</p> <p><b>BIOL 01104</b> INTRO: BIOSCIENTIFIC INQUIRY Credits: 4.0 Minimum grade: C-</p> <p><b>MATH 01122</b> PRE-CALCULUS Credits: 4.0 <span></span></p> <p><b>COMP 01112</b> COLLEGE COMPOSITION II Credits: 3.0 <span></span></p> <p><b>[CHEM 06101 and CHEM 04101]</b> Credits: 6.0 <span></span></p> <p><b>@ @</b> Credits: 3.0 <span></span></p>	<p><span>NOT TRACKED</span> Credits: 19.0</p> <p><b>STAT 02280</b> BIOMETRY Credits: 4.0 <span></span></p> <p><b>BIOL 01106</b> INTRODUCTION TO GENETICS Credits: 4.0 <span></span></p> <p><b>MATH 01130</b> CALCULUS I Credits: 4.0 <span></span></p> <p><b>[CHEM 07200 and CHEM 07201]</b> Credits: 6.0 <span></span></p> <p><b>[CHEM 07200 and CHEM 07201]</b> Credits: 6.0 <span></span></p> <p><b>CMS 04205 or CMS 04206</b> Credits: 3.0 <span></span></p>	<p><span>NOT TRACKED</span> Credits: 8.0</p> <p><b>BIOL 01203</b> INTRODUCTION TO CELL BIOLOGY Credits: 4.0 <span></span></p> <p><b>Elective - Biology w/LAB</b> 4 Credit 200+ level Biology LAB - refer to DW <span></span></p> <p><b>[CHEM 07200 and CHEM 07201]</b> Credits: 6.0 <span></span></p> <p><b>Elective - Biology Upper Level w/LAB</b> 4 Credit upper level Biology w/LAB - refer to DW <span></span></p> <p><b>Elective - Biology Upper Level w/LAB</b> 4 Credit upper level Biology w/LAB - refer to DW <span></span></p> <p><b>[PHYS 00210 and PHYS 00211]</b> Credits: 6.0 <span></span></p>	<p><span>NOT TRACKED</span> Credits: 11.0</p> <p><b>PHIL 01960</b> PHILOSOPHY OF SCIENCE- W Credits: 3.0 <span></span></p> <p><b>BIOL 01204</b> INTRODUCTION TO ECOLOGY Credits: 4.0 <span></span></p> <p><b>Elective - Biology Upper Level w/LAB</b> 4 Credit upper level Biology w/LAB - refer to DW <span></span></p> <p><b>Elective - Biology Upper Level w/LAB</b> 4 Credit upper level Biology w/LAB - refer to DW <span></span></p> <p><b>[PHYS 00210 and PHYS 00211]</b> Credits: 6.0 <span></span></p> <p><b>@ @ with LIT</b> Credits: 3.0 <span></span></p>	<p><span>NOT TRACKED</span> Credits: 7.0</p> <p><b>Elective - Biology Upper Level w/LAB</b> 4 Credit upper level Biology w/LAB - refer to DW <span></span></p> <p><b>Nonprogram Elective</b> 3 credit Non Program Course <span></span></p> <p><b>Nonprogram Elective</b> 3 credit Non Program Course <span></span></p> <p><b>[PHYS 00210 and PHYS 00211]</b> Credits: 6.0 <span></span></p> <p><b>@ @ with LIT</b> Credits: 3.0 <span></span></p>
<p><span>NOT TRACKED</span> Credits: 9.0</p> <p><b>Elective - Biology Upper Level</b> 4 Credit upper level Biology - refer to DW <span></span></p> <p><b>Nonprogram Elective</b> 3 credit Non Program Course <span></span></p> <p><b>@ @</b> Credits: 3.0 <span></span></p>	<p><span>NOT TRACKED</span> Credits: 12.0</p> <p><b>BIOL 01445</b> SPEC TOPICS: BIO SCI W/IT Credits: 3.0 <span></span></p> <p><b>Nonprogram Elective</b> 3 credit Non Program Course <span></span></p> <p><b>@ @</b> Credits: 3.0 <span></span></p>				

Print 2 pages

Destination: Save as PDF

Pages: All

Layout: Portrait

More settings

Save Cancel

4. Select **Save** or **Print** at the bottom of the screen.