

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

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AUGUST 2022

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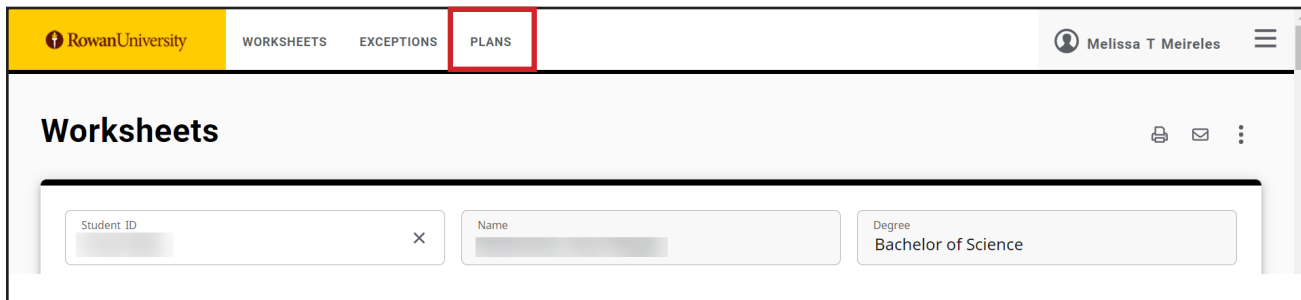
By the end of this manual the user will be able to:

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 for create 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.
5. Select **Active** if you would like to track the student's progress. Select **Locked** if you do not want the student to make changes. Both active and locked must be chosen to display if the student is "On track" (has taken courses that were planned). Note: You can only have one active plan at a time.

Edit Plan

Description \*

☐ Active ☐ Locked

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

6. Select **Save**.
7. 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.



**Accounting BS - Fall 2021**  





**PLAN LIST** **NEW PLAN**





**Degree** Bachelor of Science  
**Level** Undergraduate





**Active** No | **Status** Not locked | **Tracking Status** NOT DISPLAYED, PLAN IS NOT ACTIVE


**Last updated:** Meireles, Melissa T on 07/15/2022  
[Audit](#) [Delete plan](#) [Save as copy](#)

 **Still Needed** 

**Fall 2021**  Credits: 16.0  
  
ECON 04102 Credits: 3.0   


**Spring 2022**  Credits: 15.0  
  
COMP 01112 Credits: 3.0   


**Fall 2022**  Credits: 15.0  
  
ACC 03210 Credits: 3.0   


**ADD TERM** 

6. Select **Active** if you would like to track the student's progress. Select **Locked** if you do not want the student to make changes. Both active and locked must be chosen to display if the student is "On track" (has taken courses that were planned). Note: You can only have one active plan at a time.

**Edit Plan** 

Description \*  
Accounting BS - Fall 2021

☐ Active ☐ Locked

**CANCEL** **SAVE**

7. 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 items: 'Rowan Experience' and 'Broad-based Literature'. The main area has a header with navigation arrows and an 'ADD TERM' button highlighted with a red box. Below the header, there is a section for 'Fall 2022' with a 'NOT TRACKED' status and 'Credits: 0.0'. A plus sign button is visible below this section.

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 the text 'Please select a term to add to this plan.' Below this is a drop-down menu labeled 'Select term \*' with a downward arrow icon highlighted by a red box. At the bottom right of the dialog, there are two buttons: 'CANCEL' and 'ADD', with the 'ADD' button highlighted by a red box.

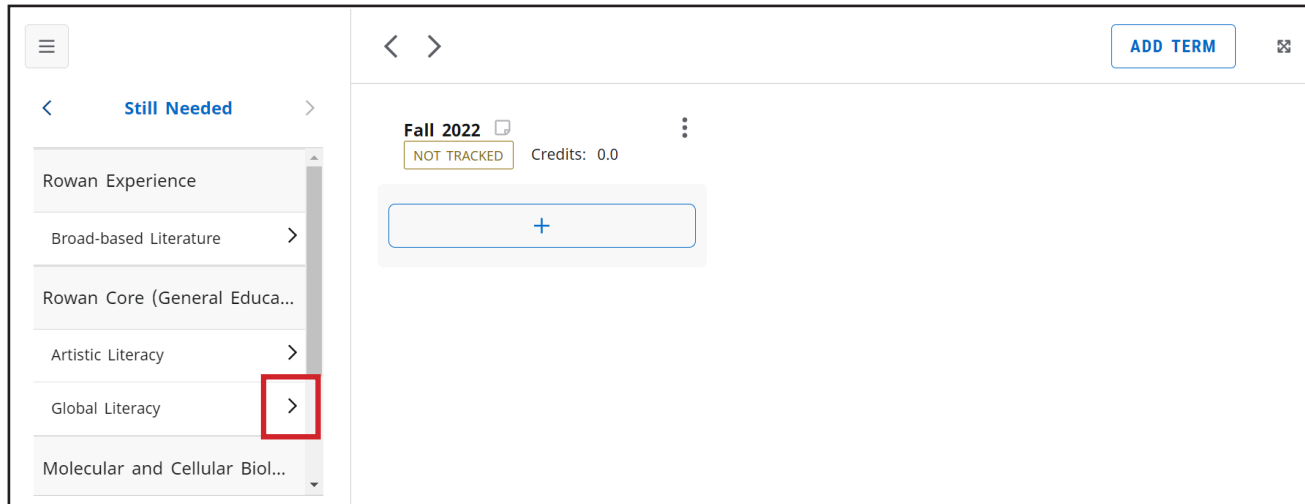
3. The term will appear on the plan. Repeat the process to add more terms.

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 'Credits: 0.0' status. Each term has a plus sign button below it. The 'ADD TERM' button in the top right corner is still visible.

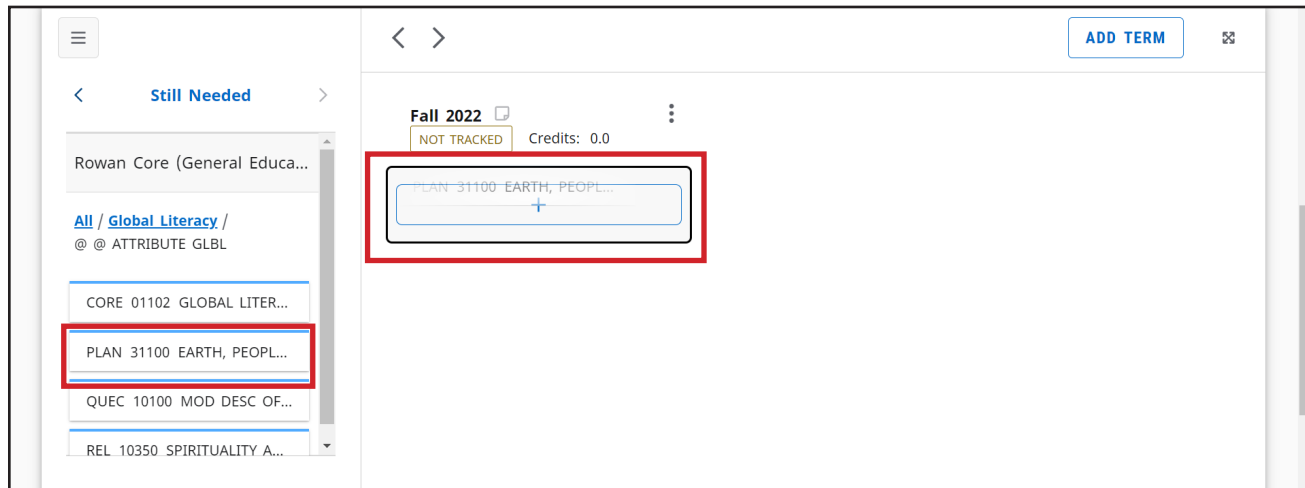


## ADD A COURSE THAT IS STILL NEEDED

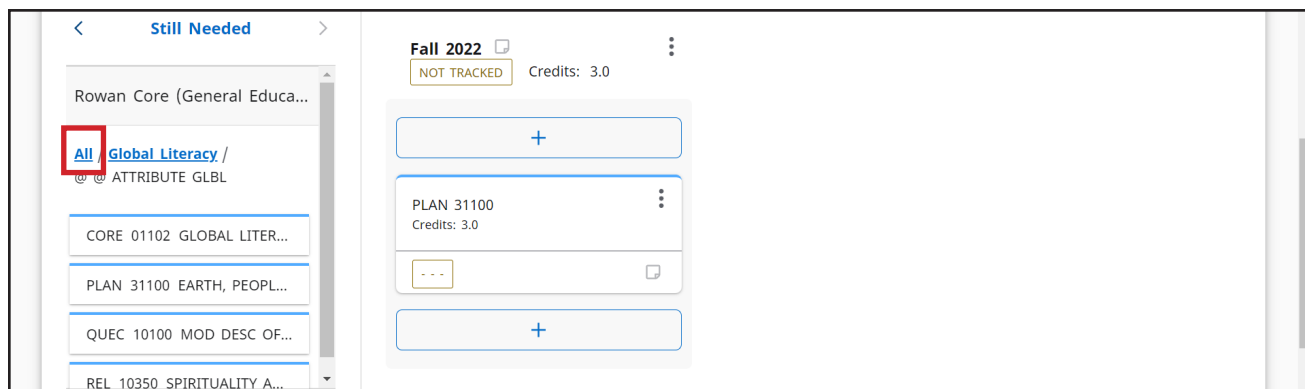
1. On the left side of the screen you will see the categories for the degree requirements that are still needed. Select the arrow next to the category to view the courses.



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 managing course plans. 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 rectangular box highlights a '+' button located below the term selection, indicating where to click to add courses for that term.

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 contains a 'Subjects' section with a red box highlighting a search area. Inside this box, there is a 'Courses' tab and a 'Still needed' tab. Below these tabs is a 'Subjects' dropdown menu and a 'Search by title' text input field with a search icon. Below the search area, a list of requirements is visible, including '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 dropdown arrow on the right side of the 'Global Literacy - 3 to 4 Credits in' section. Below this, another red box highlights a checkbox next to the 'Course' label for 'CHEM 07203'. The list includes sections like '@ @ ATTRIBUTE ARTL', 'Global Literacy - 3 to 4 Credits in', '@ @ ATTRIBUTE GLBL', 'Molecular and Cellular Biology (2700)', 'MID-LEVEL COURSES', and 'Organic Chemistry II for BMS - 1 Class in'. At the bottom, a table lists specific courses with checkboxes, course numbers, titles, and credits.

	Course	Title	Credits
<input type="checkbox"/>	CHEM 07203	ORG CHEM II - BIOMED SCIENCES	4
<input type="checkbox"/>	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	Title	Credits
MCB 01481	CELLULAR/MOLECULAR NEUROSCIENC	3
PSY 10315	PHYSIOLOGICAL PSYCHOLOGY	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 and locked, 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>	<div>+</div>
ECON 04102 Credits: 3.0 <b>ON-TRACK</b>	COMP 01112 Credits: 3.0 <b>ON-TRACK</b>	MIS 02234 Credits: 3.0 ---
BUS 01100 Credits: 1.0 <b>ON-TRACK</b>	ECON 04101 Credits: 3.0 <b>ON-TRACK</b>	ACC 03210 Credits: 3.0 ---
ACC 03150 Credits: 3.0 <b>ON-TRACK</b>	MKT 09200 Credits: 3.0 <b>WARNING</b>	STAT 02260 Credits: 3.0 ---
MATH 01130 or MATH 03125 Credits: 3.0	@ @ with LIT Credits: 3.0	@ @ with ARTL Credits: 3.0

# PLANS

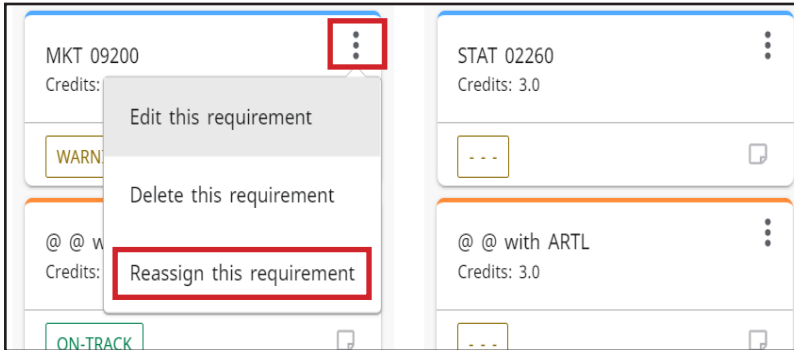
## MODIFY THE PLAN

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

### Reassign Requirements

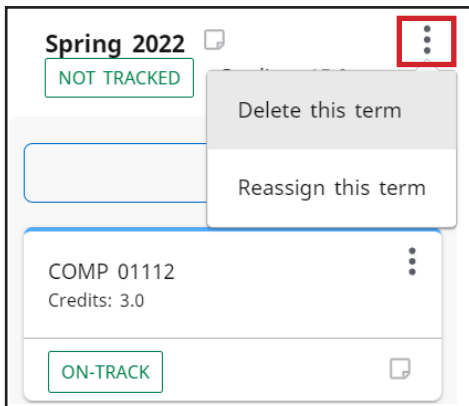
You can move requirements between terms by selecting the requirement, then dragging and dropping it into the appropriate term.

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



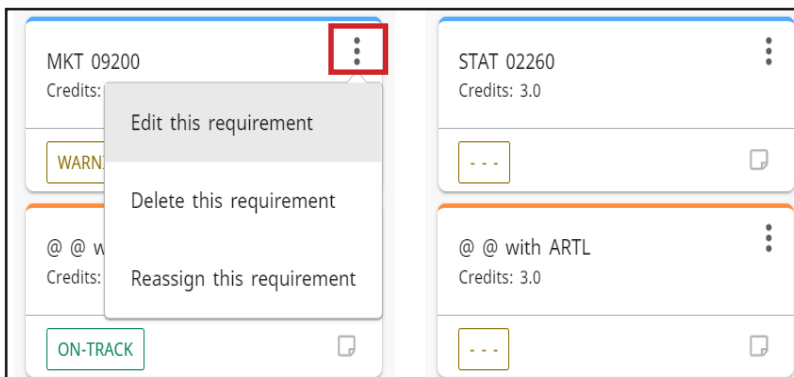
### Reassign or Delete a Term

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**.

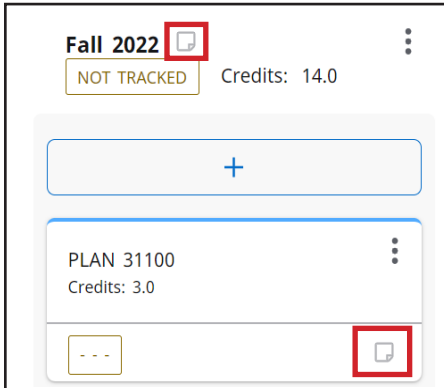


# PLANS

## Add a Note

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

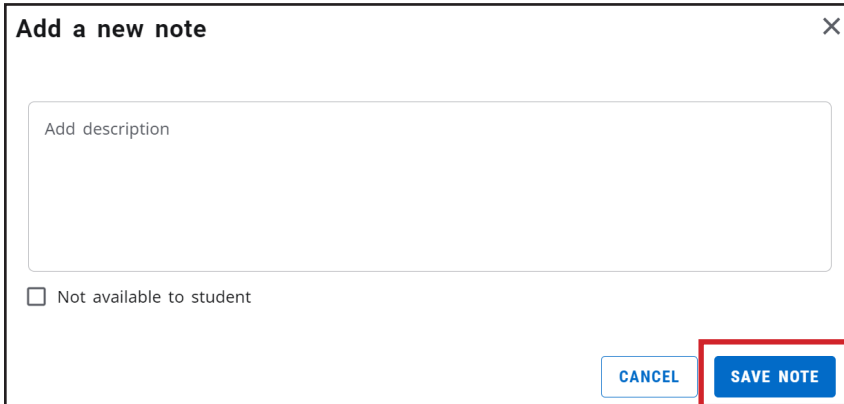
1. Select **note icon**.



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 right corner of the plan, select **Audit**.

Last updated: Meireles, Melissa T on 07/15/2022

**Audit** Delete plan Save as copy

Still Needed

Fall 2021 NOT TRACKED Credits: 16.0

Spring 2022 NOT TRACKED Credits: 15.0

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.

### Planner Audit

Student name [REDACTED]  
Plan description Accounting BS - Fall 2021

**Degree progress**

96% Requirements 100% Credits

Overall GPA 2.475

Degree Bachelor of Science Level Undergraduate Classification 2) Sophomore Major Accounting - UG Program Accounting (BS)

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
ⓘ	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
ⓘ	Statistics I - Minimum Grade C- (Satisfies Quantitative Literacy)	STAT 02260	STATISTICS I	R	(3)	Fall 2022
ⓘ	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
④ Organizational Behavior	MGT 06300	ORGANIZATIONAL BEHAVIOR	PLAN	(3)	Fall 2023
④ Principles of Finance	FIN 04300	PRINCIPLES OF FINANCE	PLAN	(3)	Spring 2024
④ 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	