

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

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OCTOBER 2022

**CONTACT**

[DegreeWorks@rowan.edu](mailto:DegreeWorks@rowan.edu)

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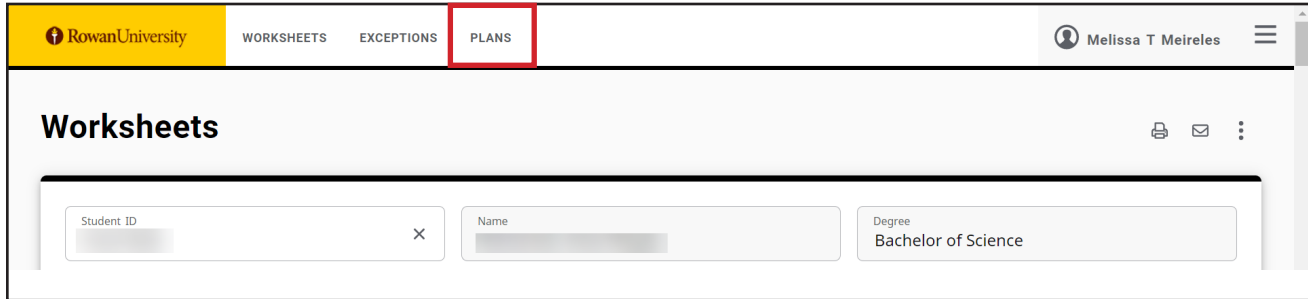
By the end of this manual the user will be able to:

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.



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



## 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.

## CREATE A BLANK PLAN

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

Description	Active	Modified ↓	Who	Degree	Level	Status
Test Plan	Yes	06/27/2022	Meireles, Melissa T	BS	UG	Not locked

2. Select **Blank Plan**.

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

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

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

Select term \*

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

Description \*

Degree  
Bachelor of Arts

Active

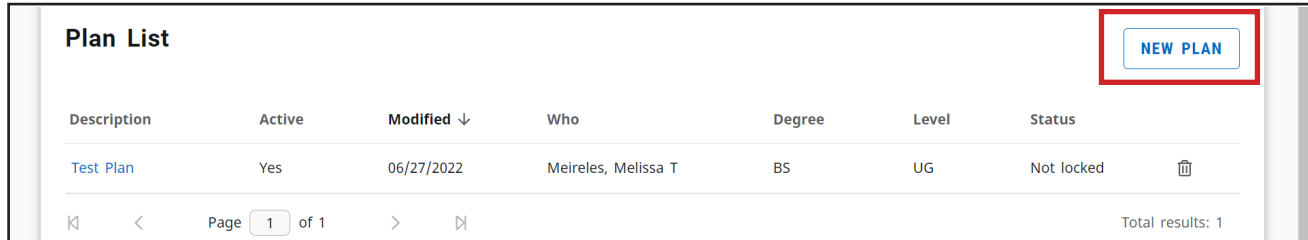
5. If you have multiple programs of study, you will see the Degree drop-down. Select the **Degree** you are creating the plan for.
6. Select **Active** if you would like to enable tracking.
7. Select **Save**.
8. The Blank Plan will appear. Scroll down to begin adding to the plan. You will see the starting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

# PLANS

## CREATE A PLAN FROM A TEMPLATE

Please note that not all majors have templates available. If you do not see an appropriate template for your major, please build a plan from scratch or contact your advisor.

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




**Plan List**

Description	Active	Modified ↓	Who	Degree	Level	Status
Test Plan	Yes	06/27/2022	Meireles, Melissa T	BS	UG	Not locked

Page 1 of 1 Total results: 1

2. Choose **Select Template**.

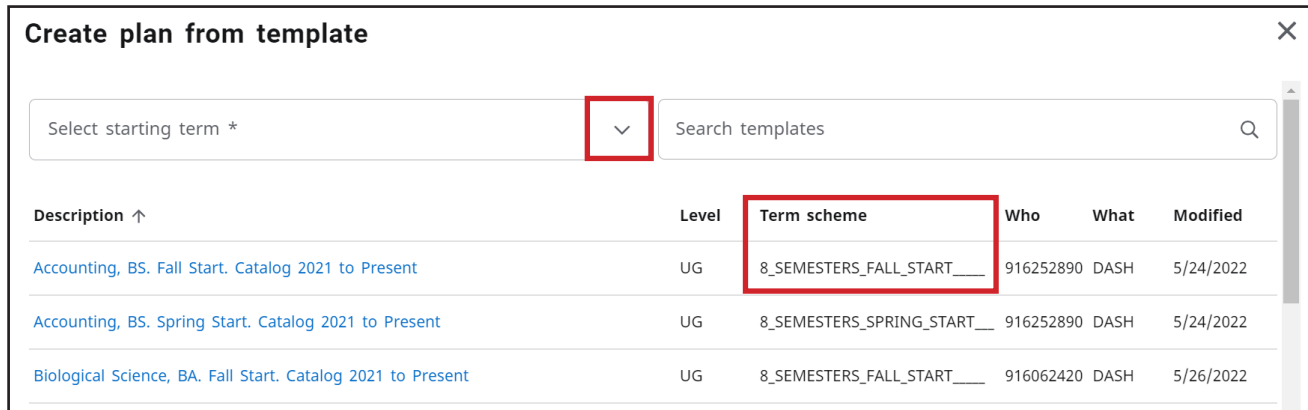


**Create Plan**

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.

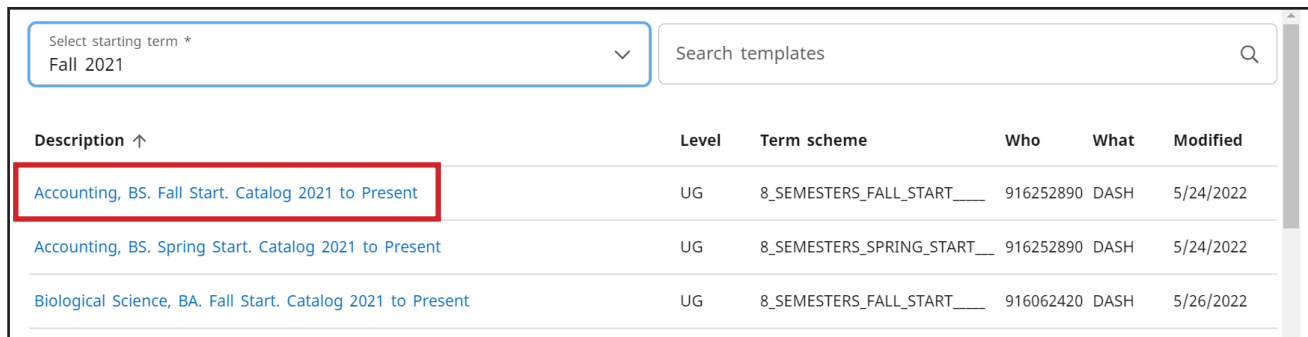


**Create plan from template**

Select starting term \* Search templates

Description ↑	Level	Term scheme	Who	What	Modified
Accounting, BS. Fall Start. Catalog 2021 to Present	UG	8_SEMESTERS_FALL_START____	916252890	DASH	5/24/2022
Accounting, BS. Spring Start. Catalog 2021 to Present	UG	8_SEMESTERS_SPRING_START__	916252890	DASH	5/24/2022
Biological Science, BA. Fall Start. Catalog 2021 to Present	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 \* Search templates

Fall 2021

Description ↑	Level	Term scheme	Who	What	Modified
Accounting, BS. Fall Start. Catalog 2021 to Present	UG	8_SEMESTERS_FALL_START____	916252890	DASH	5/24/2022
Accounting, BS. Spring Start. Catalog 2021 to Present	UG	8_SEMESTERS_SPRING_START__	916252890	DASH	5/24/2022
Biological Science, BA. Fall Start. Catalog 2021 to Present	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.

The screenshot shows the 'Accounting BS - Fall 2021' plan template. At the top, there is a title 'Accounting BS - Fall 2021' with a pencil icon (highlighted in a red box) and a copy icon. To the right are 'PLAN LIST' and 'NEW PLAN' buttons. Below the title, the 'Degree' is 'Bachelor of Science' and the 'Level' is 'Undergraduate'. The 'Active' status is 'No', 'Status' is 'Not locked', and 'Tracking Status' is 'NOT DISPLAYED, PLAN IS NOT ACTIVE'. A 'Last updated' message reads 'Meireles, Melissa T on 07/15/2022'. Below this are 'Audit', 'Delete plan', and 'Save as copy' links. The main area shows a grid of terms: 'Fall 2021' (Credits: 16.0), 'Spring 2022' (Credits: 15.0), and 'Fall 2022' (Credits: 15.0). Each term has a '+' button and a list of courses: 'ECON 04102' (Credits: 3.0) for Fall 2021, 'COMP 01112' (Credits: 3.0) for Spring 2022, and 'ACC 03210' (Credits: 3.0) for Fall 2022. An 'ADD TERM' button is in the top right of the grid area.

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

The 'Edit Plan' dialog box has a title bar with a close button (X). It contains a 'Description\*' text field with the value 'Political Science BA - Fall 2021'. Below it is a 'Degree' drop-down menu currently set to 'Bachelor of Arts'. There is an 'Active' checkbox which is currently unchecked. At the bottom right are 'CANCEL' and 'SAVE' buttons.

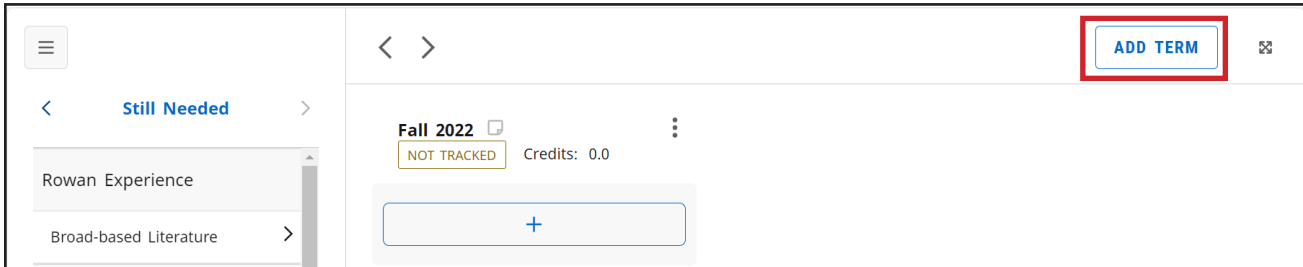
7. If you have multiple programs of study, you will see the Degree drop-down. Select the **Degree** you are creating the plan for.
8. Select **Active** if you would like enable tracking.
9. Select **Save**.

# PLANS

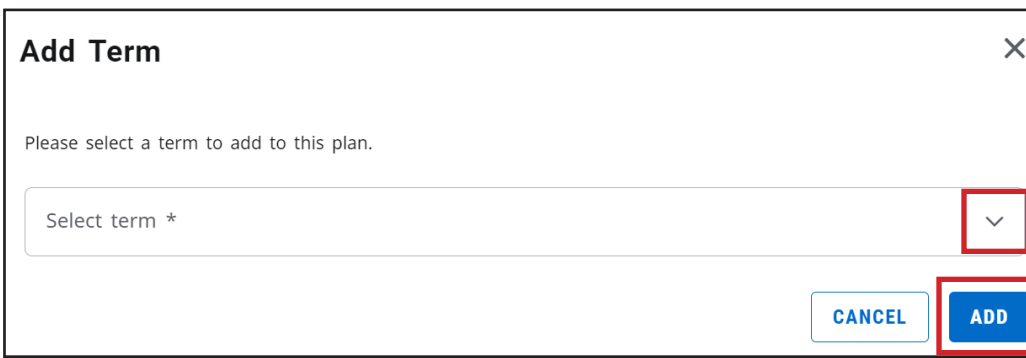
## ADD A TERM

You can add other terms to the plan to continue mapping out your coursework.

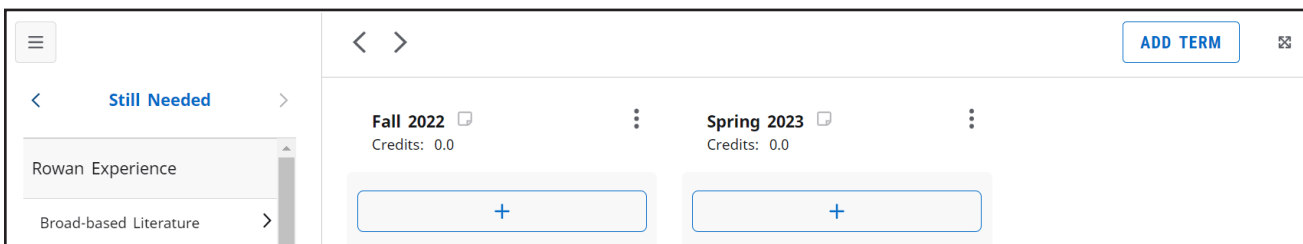
1. Select **Add Term** on the right side of the screen.



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



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

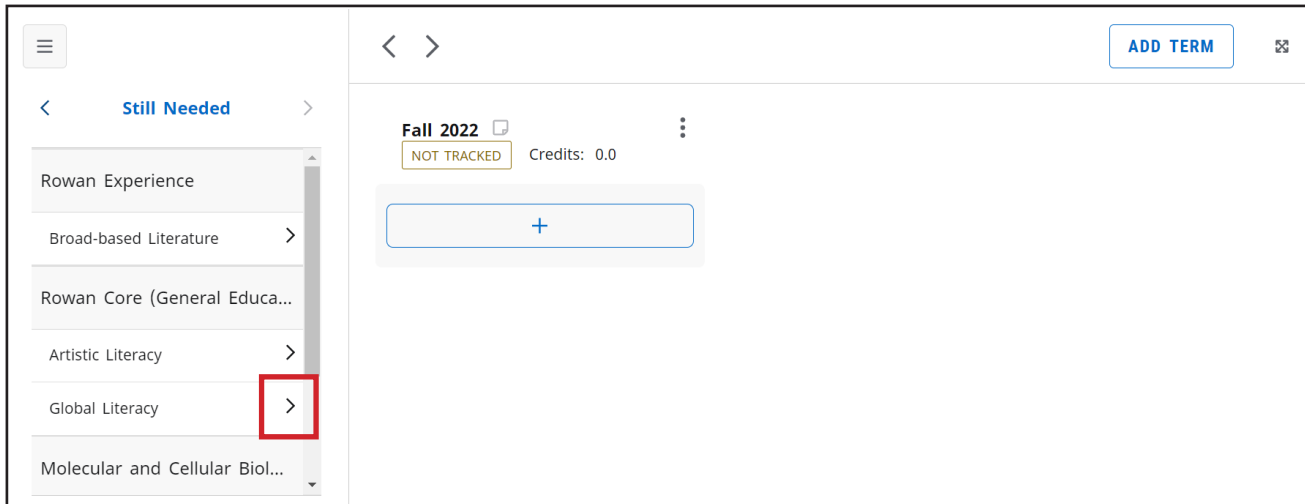




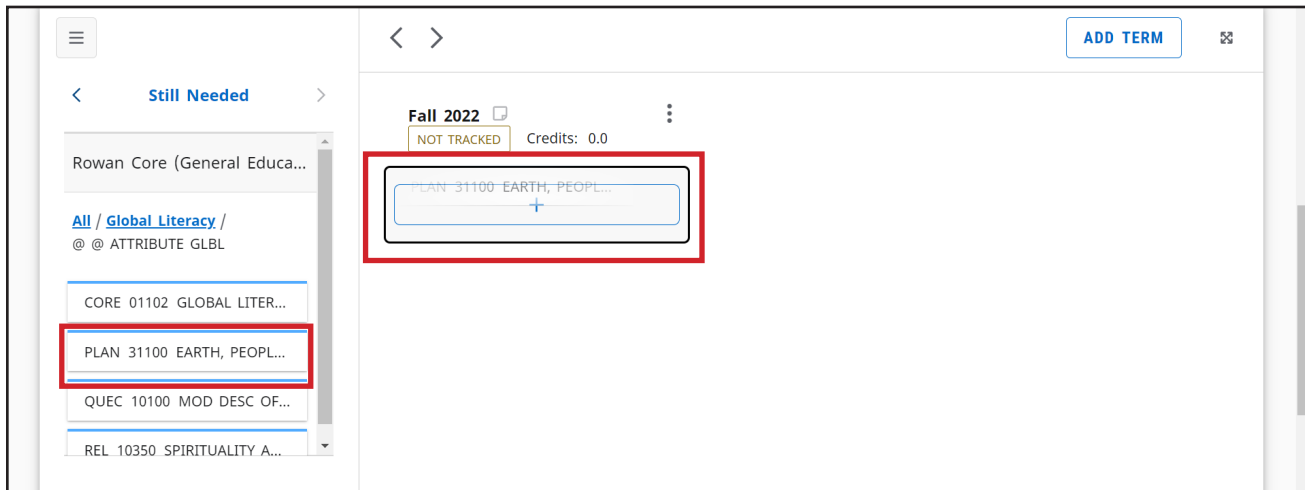
# PLANS

## ADD A COURSE THAT IS STILL NEEDED

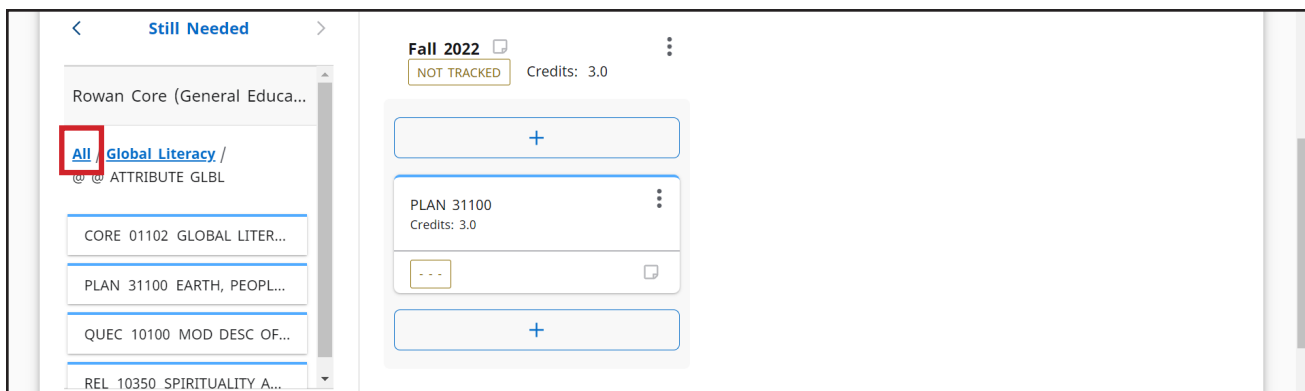
1. On the left side of the screen you will see the categories for the degree requirements that are still needed. Select the arrow next to the category to view the courses.



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



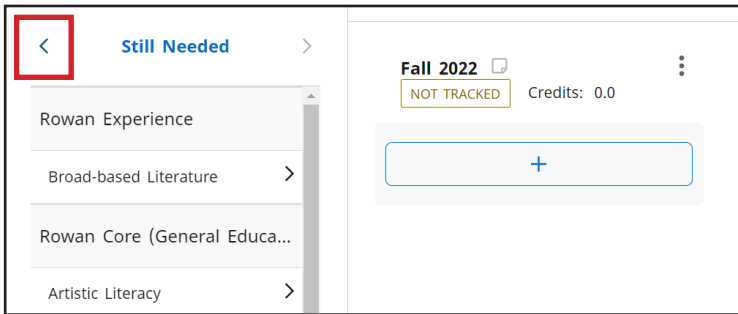
3. You will see the course listed under the term. Select **All** to return to the full list of categories for the requirements that are still needed.



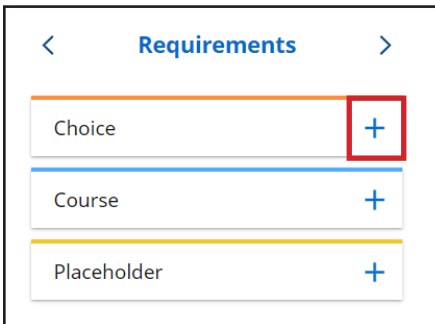
## ADD A CHOICE REQUIREMENT

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 (@).

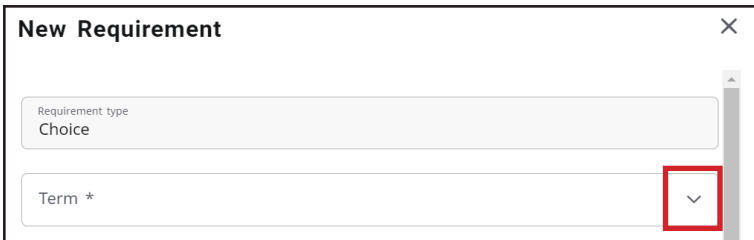
1. On the left side of the screen you will see the Still Needed section. Select the **left arrow**.



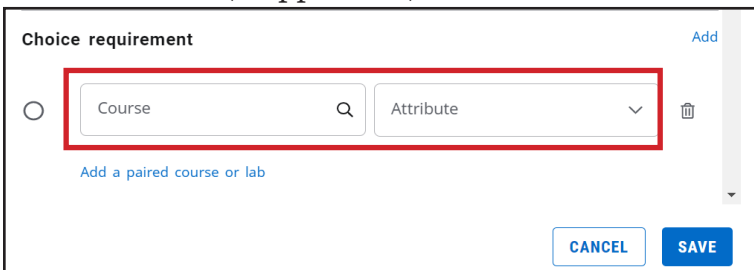
2. Select the **+ icon** next to Choice.



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).

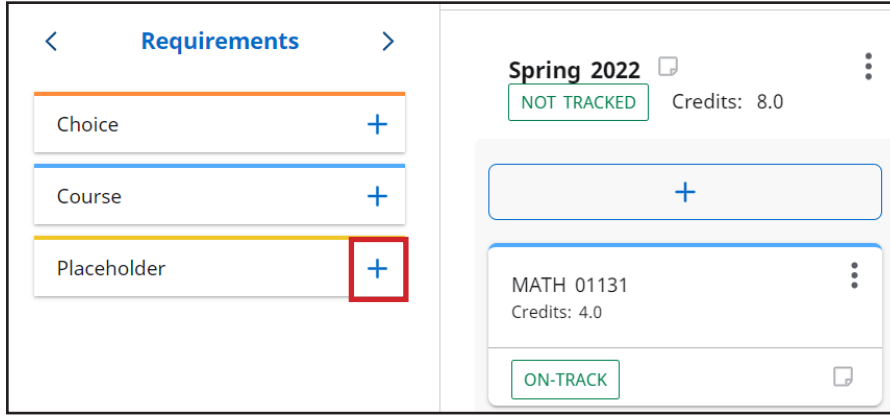


5. Select **Add** if you need to add another course.
6. Optional: Enter the number of credits, minimum grade, select the campus and delivery.
7. Select **Save**.

## ADD A PLACEHOLDER

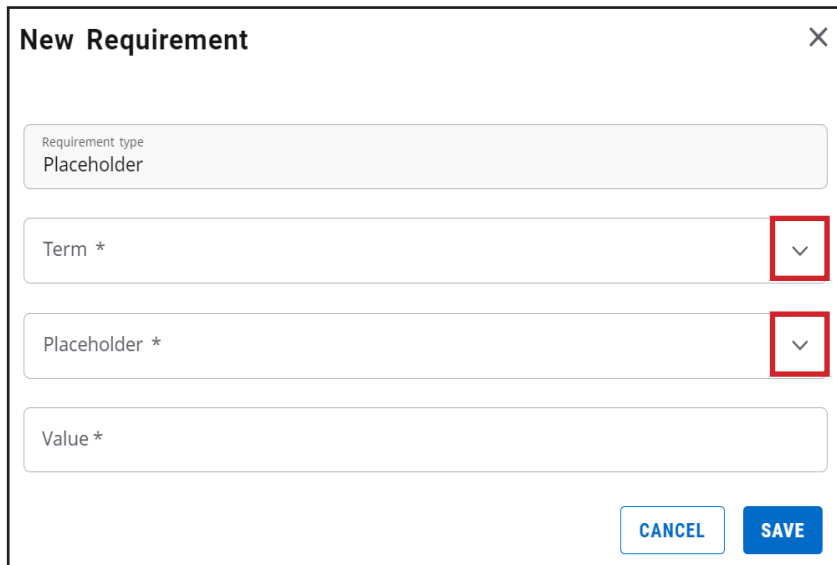
A placeholder is used for elective credits, internships, etc.

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



The screenshot shows a mobile application interface. On the left, under the heading "Requirements", there is a list of three items: "Choice" with a blue plus icon, "Course" with a blue plus icon, and "Placeholder" with a blue plus icon. The "Placeholder" item is highlighted with a yellow border, and its plus icon is also highlighted with a red border. On the right, a detailed view of a requirement is shown for "Spring 2022" with a status of "NOT TRACKED" and "Credits: 8.0". Below this, there is a grey button with a blue plus icon. Underneath that, a requirement for "MATH 01131" with "Credits: 4.0" is shown, with a status of "ON-TRACK".

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

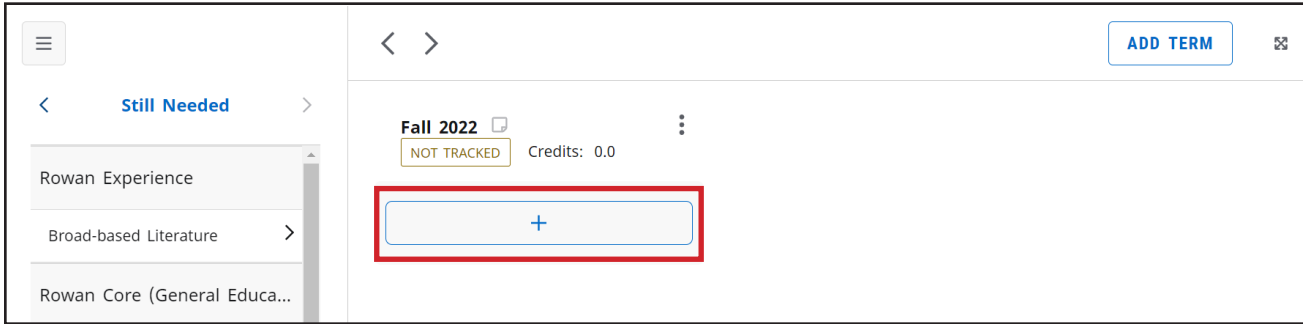


The screenshot shows a "New Requirement" form. At the top, it says "Requirement type Placeholder". Below this are three fields: "Term \*" with a dropdown arrow, "Placeholder \*" with a dropdown arrow, and "Value \*" with a text input field. The dropdown arrows for "Term" and "Placeholder" are highlighted with red boxes. At the bottom right, there are two buttons: "CANCEL" and "SAVE".

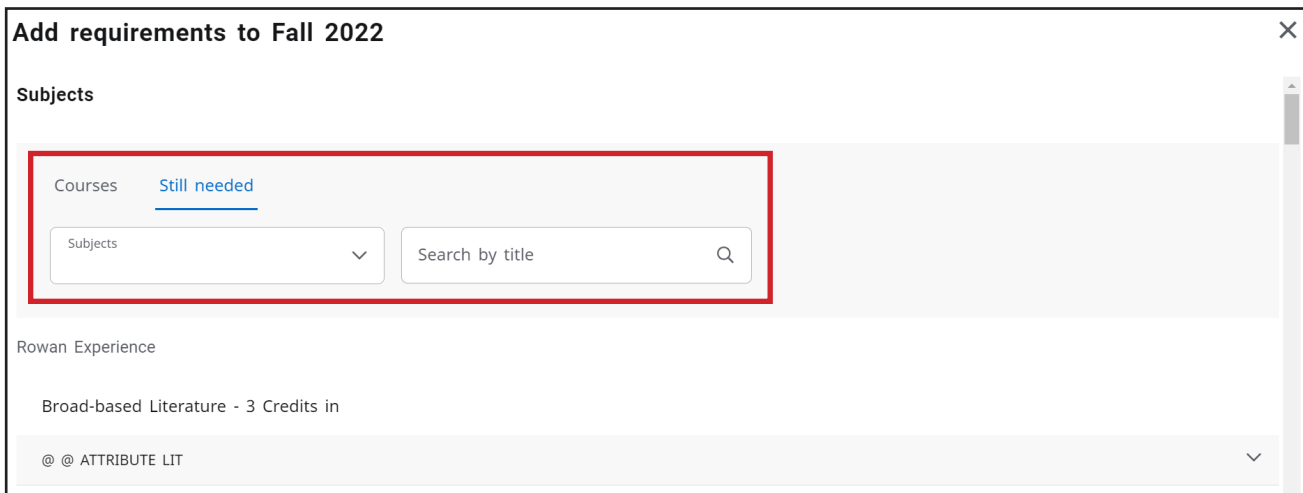
3. Enter the **value**. The value is the note that will display on the plan. Note: Placeholders do not count toward the credit total and will not check off requirements on the plan. Any number placed in the value field will not be added to the term's total credits.
4. Select **Save**.

## ADD MULTIPLE COURSES

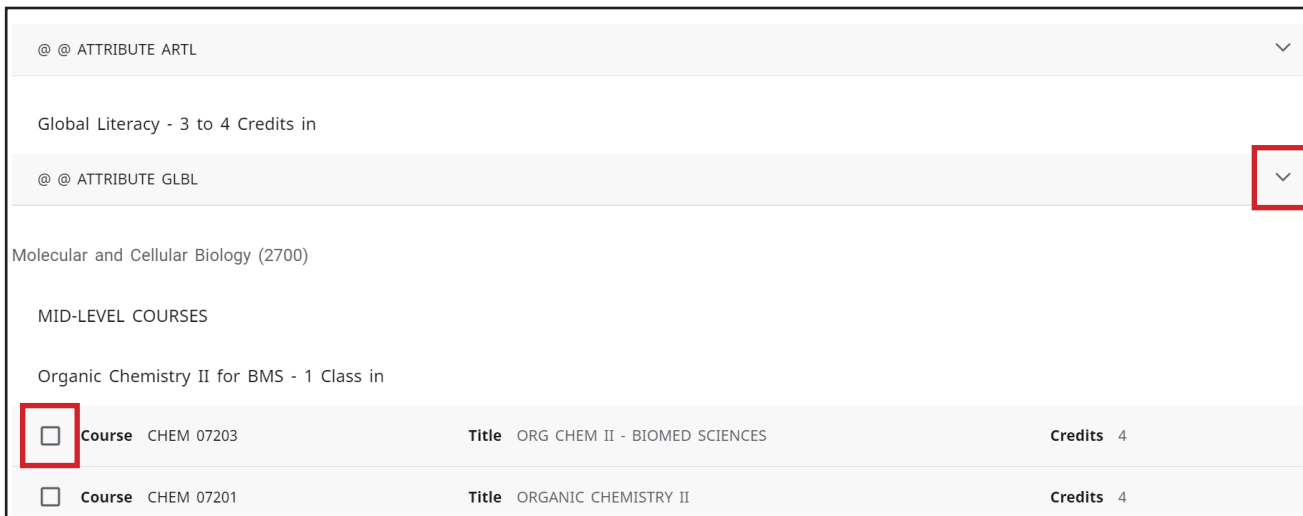
1. Select the **+** icon under the name of the appropriate term.



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.



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.



# 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 your advisor has made your plan active, then the template will track whether you are on track or off track. Review the plan to determine whether your registration is “on-track.”

Under the course name you will see, “On-track” or “Warning”.

**On-track** designates that you have met the requirement.

**Warning** designates that you have not met the requirement (not taken, failed, withdrawn, etc.)

Term	Credits	Status	Course	Credits
Fall 2021	16.0	NOT TRACKED	ECON 04102	3.0
Fall 2021	16.0	ON-TRACK	BUS 01100	1.0
Fall 2021	16.0	ON-TRACK	ACC 03150	3.0
Fall 2021	16.0	ON-TRACK	MATH 01130 or MATH 03125	3.0
Spring 2022	15.0	NOT TRACKED	COMP 01112	3.0
Spring 2022	15.0	ON-TRACK	ECON 04101	3.0
Spring 2022	15.0	WARNING	MKT 09200	3.0
Spring 2022	15.0	@ @ with LIT	@ @ with LIT	3.0
Fall 2022	12.0	NOT TRACKED	MIS 02234	3.0
Fall 2022	12.0	---	ACC 03210	3.0
Fall 2022	12.0	---	STAT 02260	3.0
Fall 2022	12.0	---	@ @ with ARTL	3.0

# PLANS

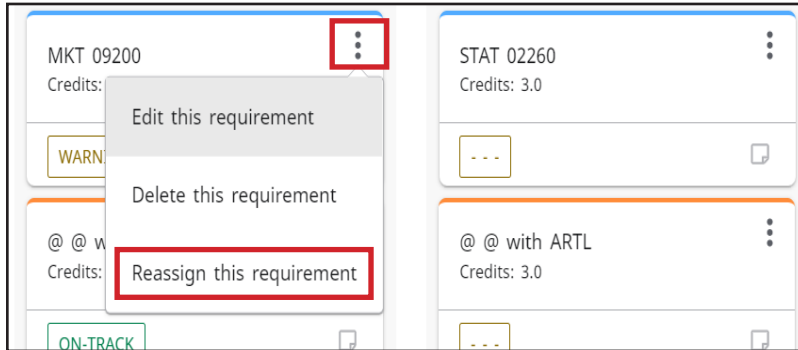
## MODIFY THE PLAN

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

### Reassign Requirements

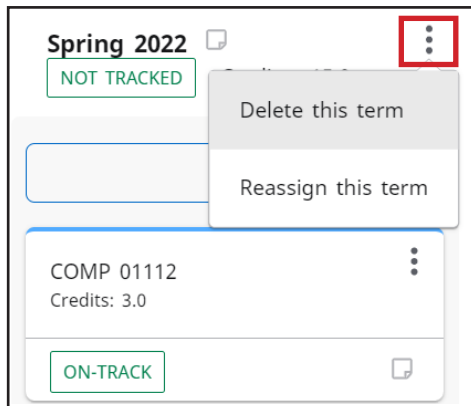
You can move requirements between terms by selecting the requirement, then dragging and dropping it into the appropriate term.

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



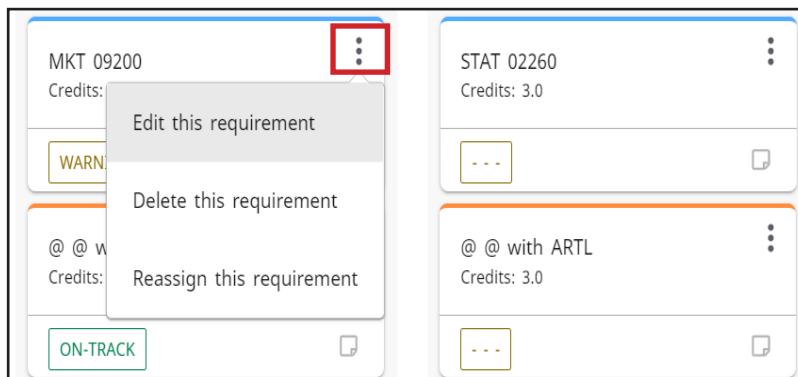
### Reassign or Delete a Term

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**.

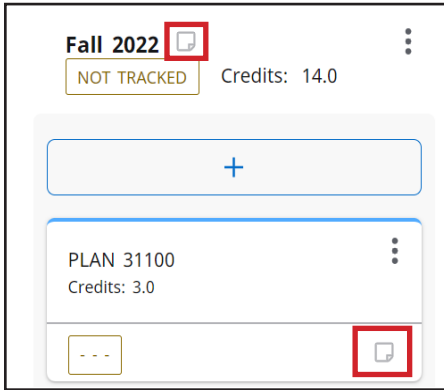


# PLANS

## Add a Note

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

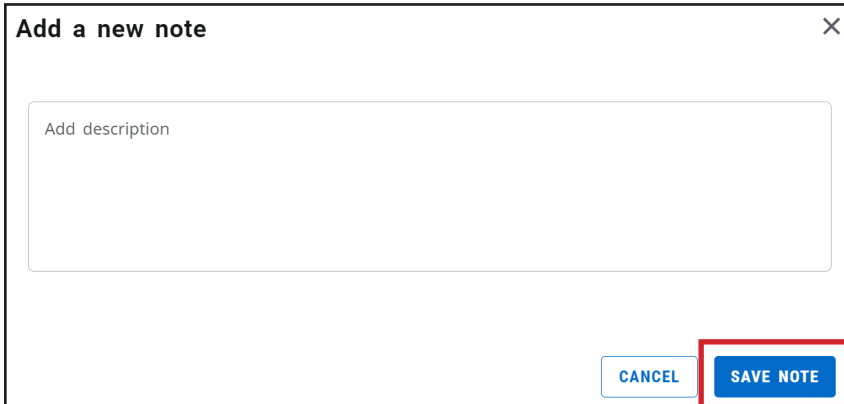
1. Select **note icon**.





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 you plan to take, not just the current or past courses you 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**.

**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 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.

<input checked="" type="checkbox"/>	Legal Environment of Business	MGT 98242	LEGAL ENVIRONMENT	D	3	Spring 2022
<input type="checkbox"/>	Organizational Behavior	MGT 06300	ORGANIZATIONAL BEHAVIOR	PLAN	(3)	Fall 2023
<input type="checkbox"/>	Principles of Finance	FIN 04300	PRINCIPLES OF FINANCE	PLAN	(3)	Spring 2024
<input type="checkbox"/>	Operations Management	MGT 06305	OPERATIONS MGMT	PLAN	(3)	Fall 2023
<input type="checkbox"/>	Business Policy	<b>Still needed:</b>	<b>1 Class in MGT 06402</b>			

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 

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

The screenshot displays a course plan interface. On the left, a student's plan is shown with details like 'Student name', 'Plan Description', and 'Tracking Status'. The main area is a grid of course cards for semesters from Fall 2022 to Spring 2026. Each card lists a course ID, title, credits, and a 'ON-TRACK' status. On the right, a print menu is visible with options for 'Print', 'Destination' (set to 'Save as PDF'), 'Pages', 'Layout', and 'More settings'. 'Save' and 'Cancel' buttons are at the bottom right.

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