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INFORMATION RESOURCES & TECHNOLOGY

DEGREE WORKS STUDENT EDUCATIONAL PLANNER
TRAINING MANUAL

OCTOBER 2022

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TABLE OF CONTENTS

RowanUniversity

INFORMATION RESOURCES & TECHNOLOGY

Introduction to Degree Works Student Educational Planner

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

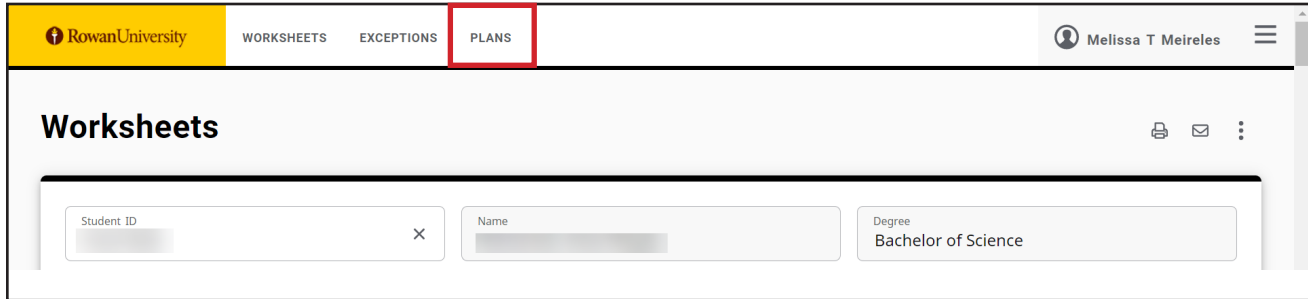By the end of this manual the user will be able to:

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

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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.

Plan List							NEW PLAN
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. 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 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.

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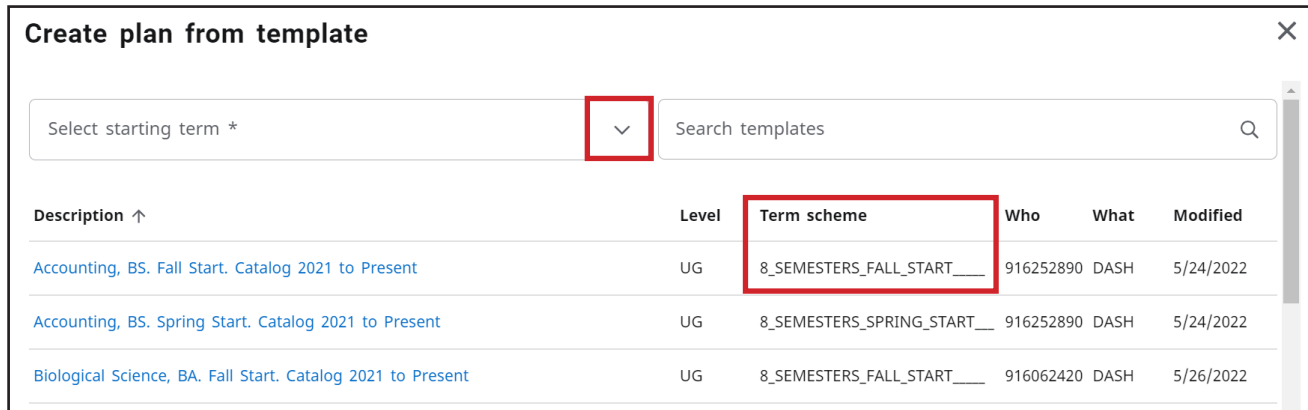
1. Select **New Plan** from the Plan List Block.

2. Choose **Select Template**.

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.
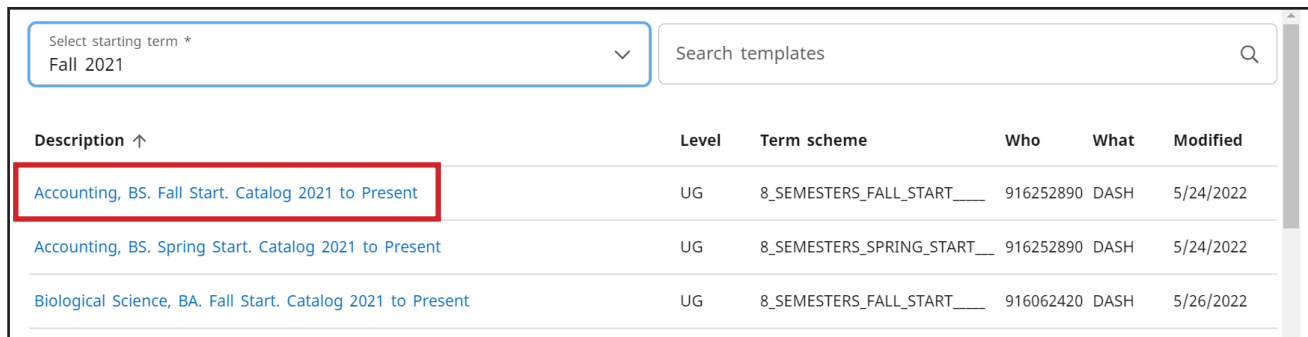

4. Use the Search Templates field to narrow down the list or select the **name of the template** from the list. Note: The starting term must match the term start in the "Term Scheme" column. If they do not match you will receive an error.

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 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.
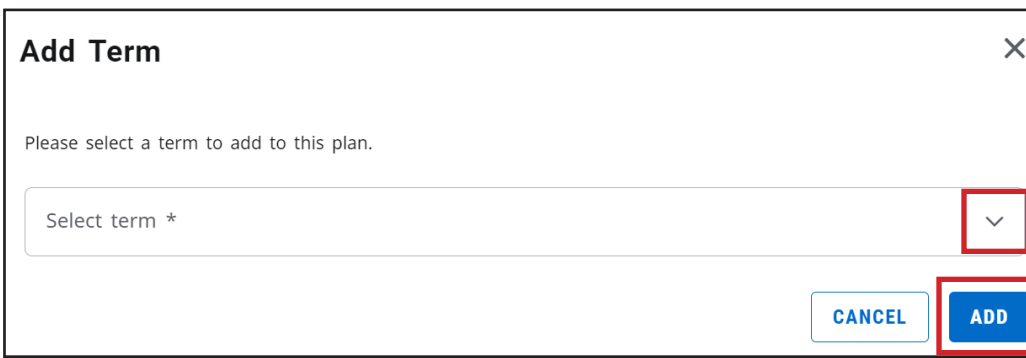9. Select **Save**.

ADD A TERM

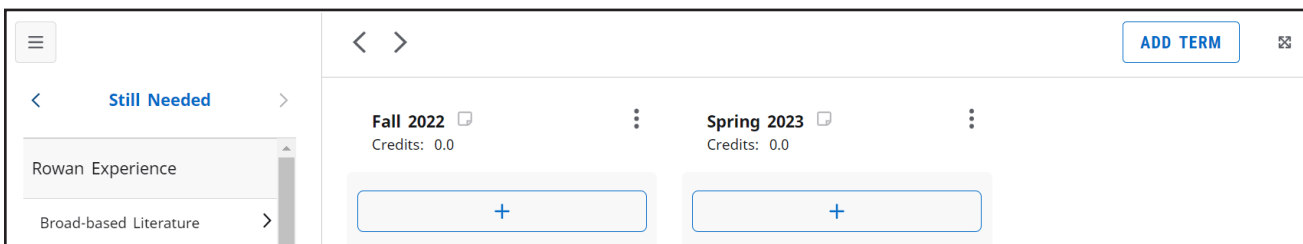You can add other terms to the plan to continue mapping out your coursework.

1. Select **Add Term** on the right side of the screen.
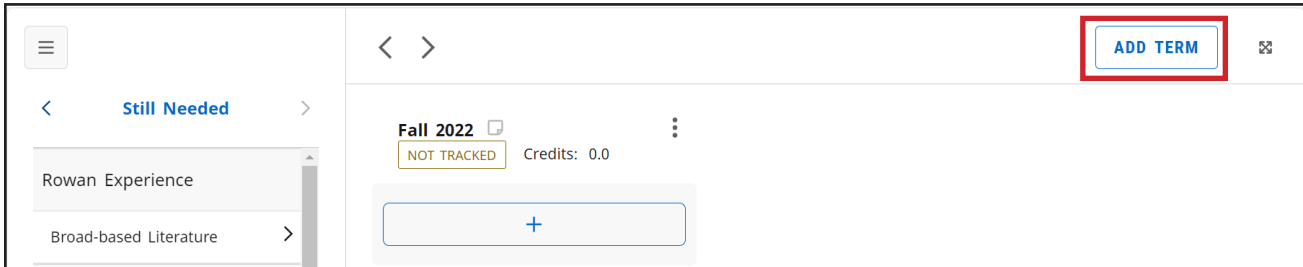
2. Use the drop-down to select the **term** for the plan. Select **Add**.

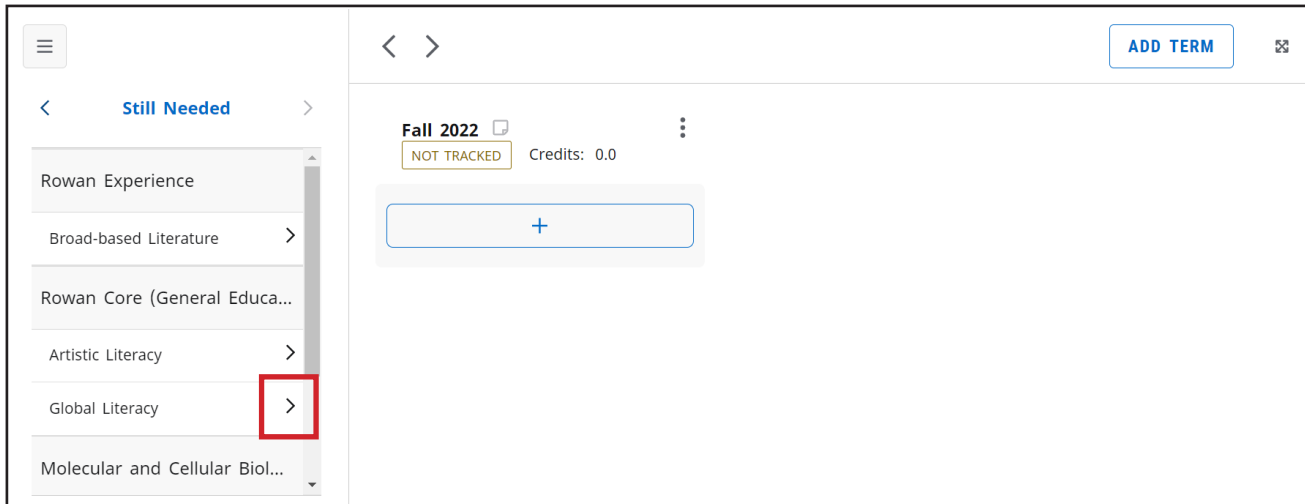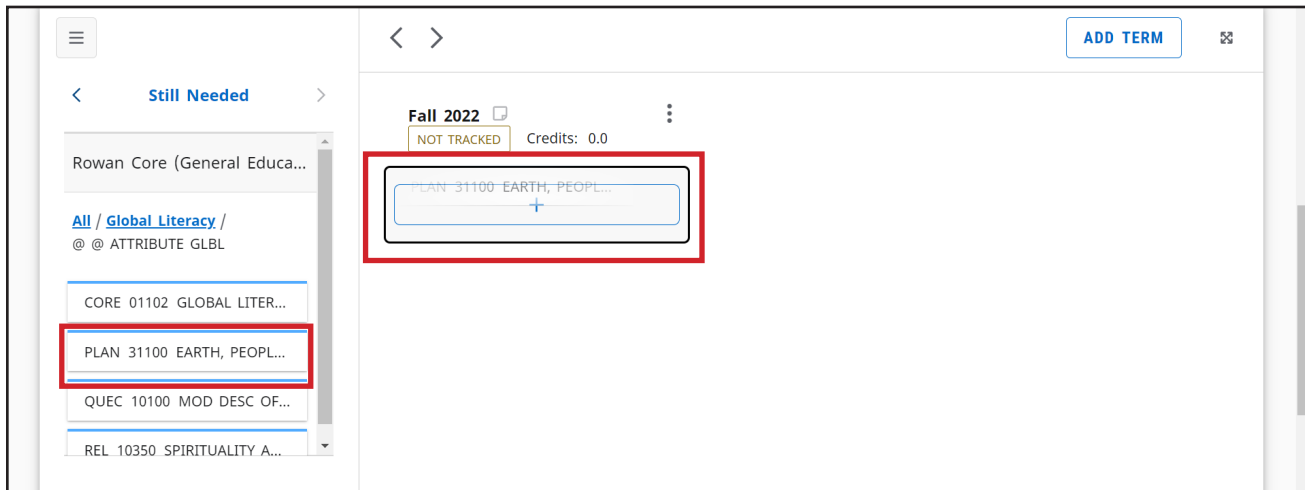3. The term will appear on the plan. Repeat the process to add more terms.

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.

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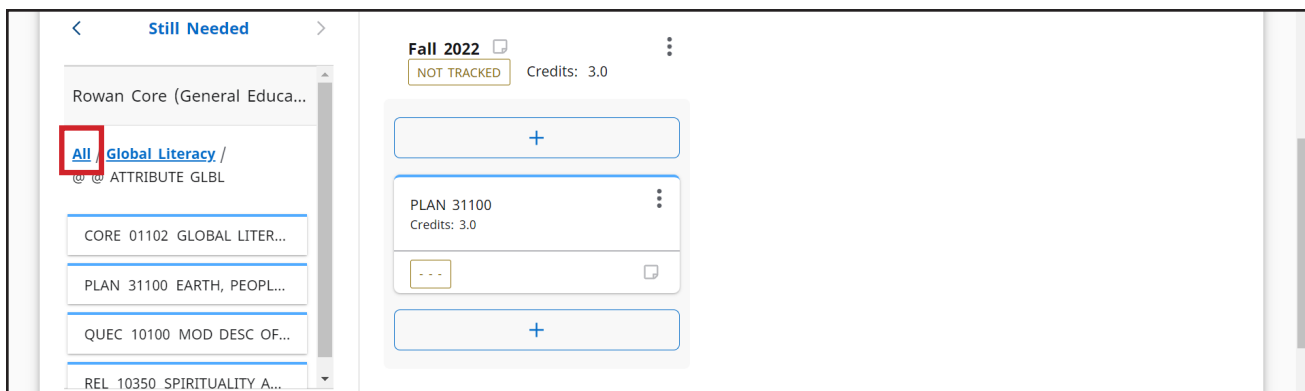
ADD A CHOICE REQUIREMENT

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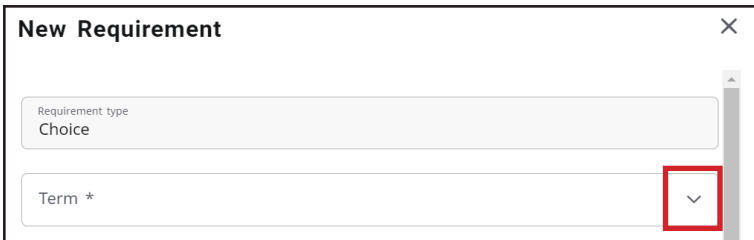
1. On the left side of the screen you will see the Still Needed section. Select the **left arrow**.
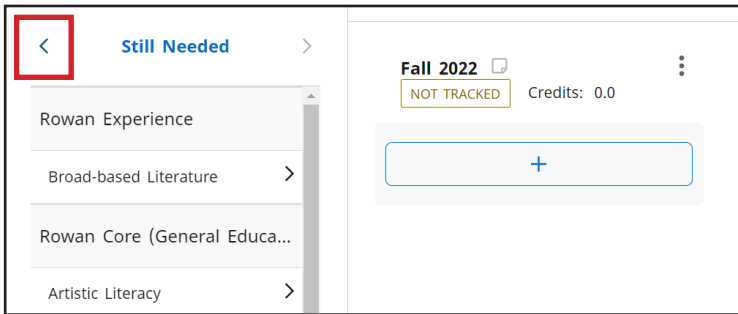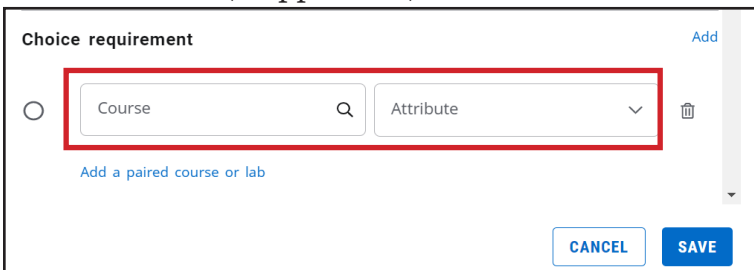

2. Select the **+ icon** next to Choice.
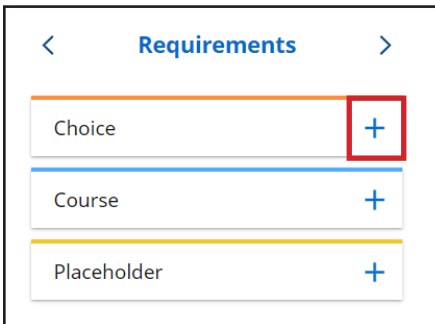
3. Use the term drop-down to select the appropriate **term**.

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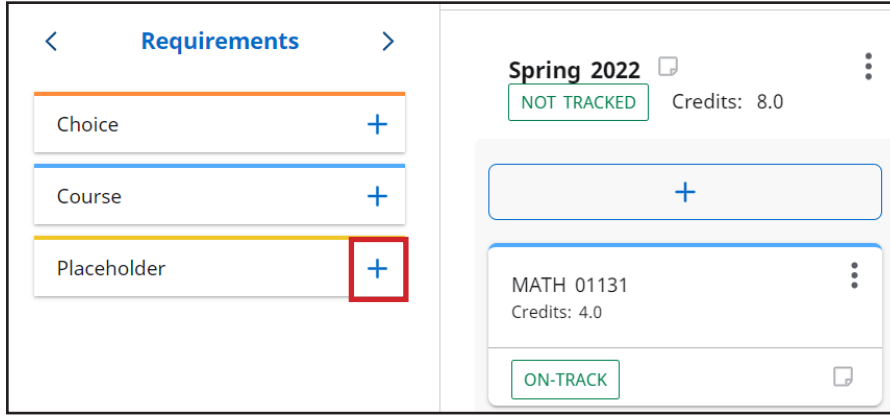

5. Select **Add** if you need to add another course.
6. Optional: Enter the number of credits, minimum grade, select the campus and delivery.
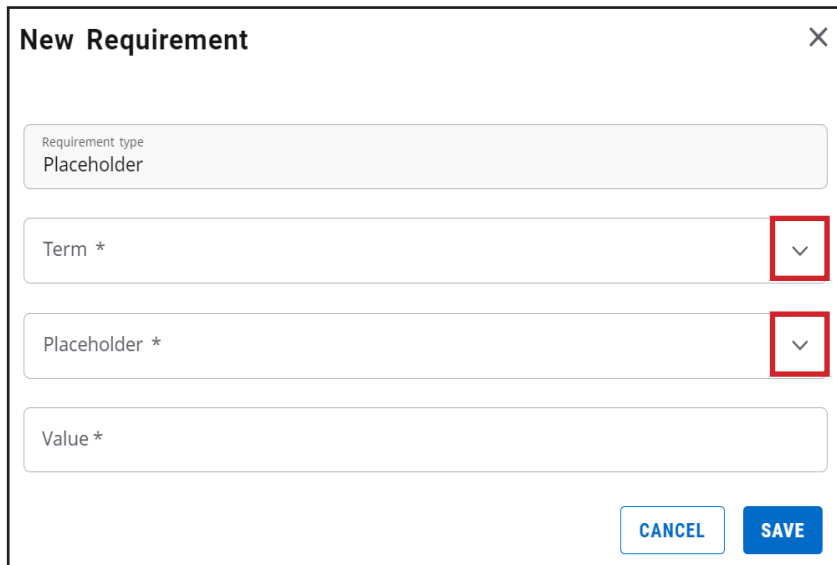7. Select **Save**.

ADD A PLACEHOLDER

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

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

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

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**.

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ADD MULTIPLE COURSES

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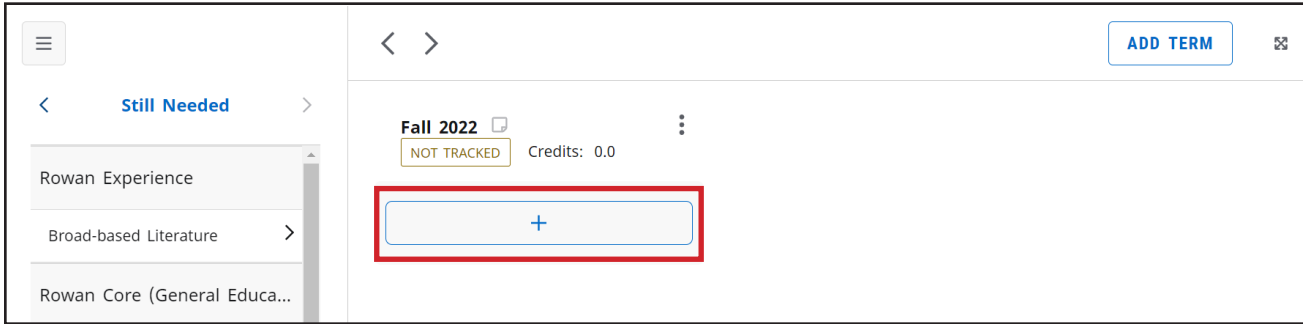
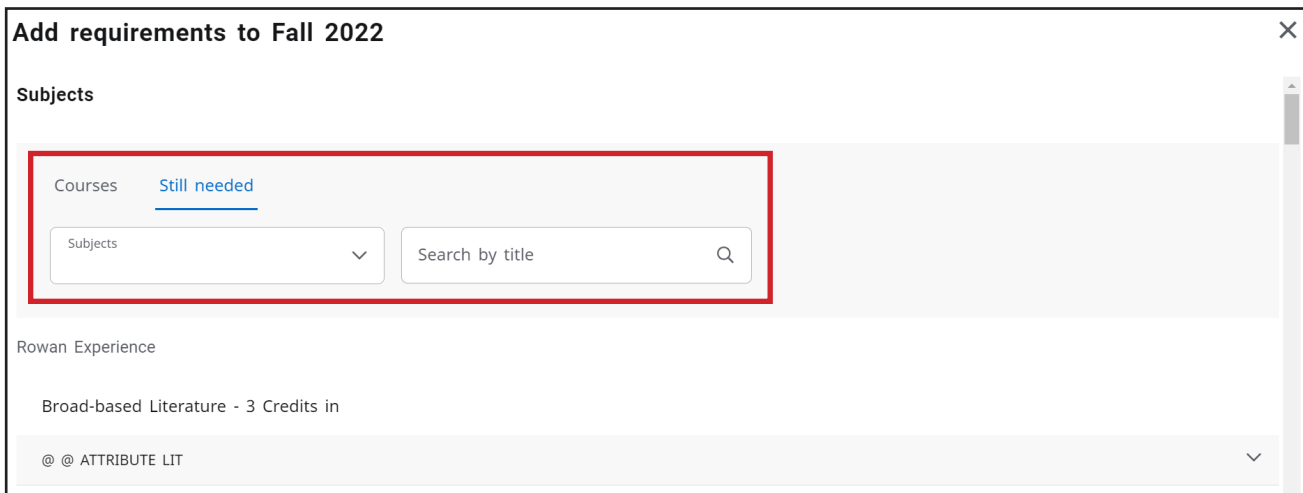2. The degree requirements that are still needed are listed. Browse through the list or use the Subjects drop-down and Search by title field to search for a specific course. You can also select **Courses** if you would like to search from all courses.

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.

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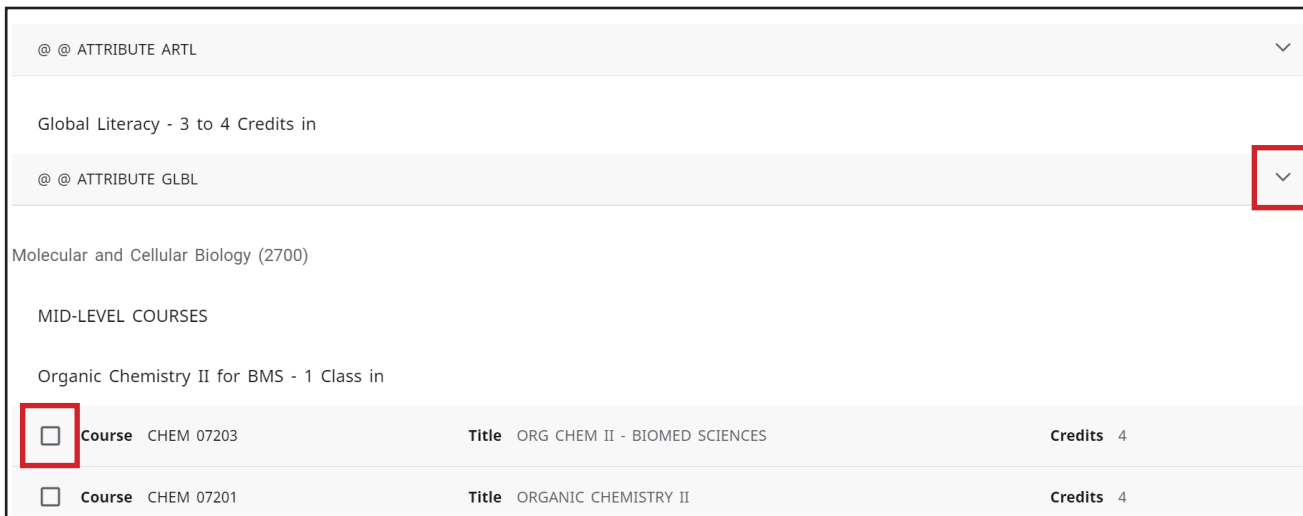
4. Scroll to the bottom of the window. You will see the courses you have selected. Select the **X** next to the course if you no longer want to add it to the plan. Select **Add to Plan**.

☐ **Course** MCB 01481	**Title** CELLULAR/MOLECULAR NEUROSCIENC		**Credits** 3	
☐ **Course** PSY 10315	**Title** PHYSIOLOGICAL PSYCHOLOGY		**Credits** 3	

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

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.)

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

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**.
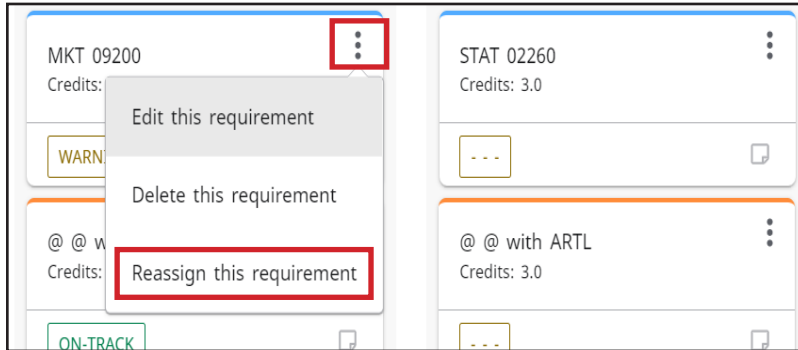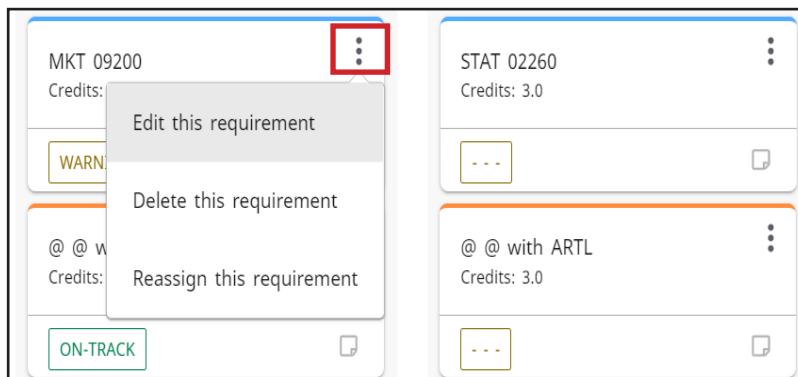

Reassign or Delete a Term
You can reassign or delete an entire term at once. Select the **ellipsis** for the term then select **Delete this Term or Reassign this term**.
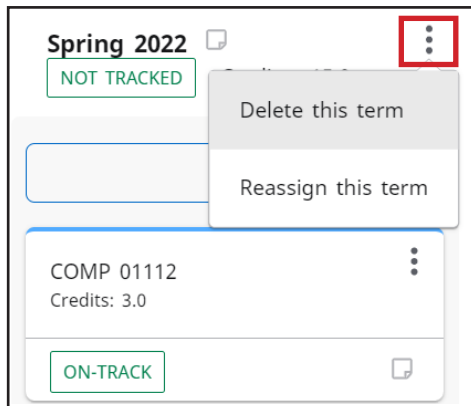
Edit or Delete Requirements
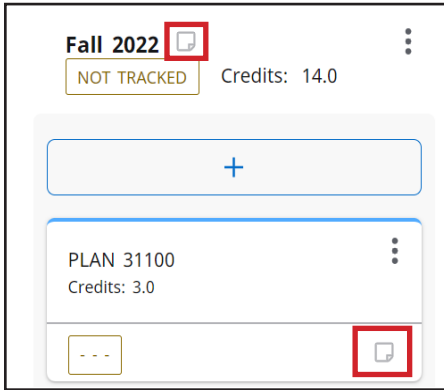Select the **ellipsis** for the requirement then select **Edit this requirement or Delete this requirement**.

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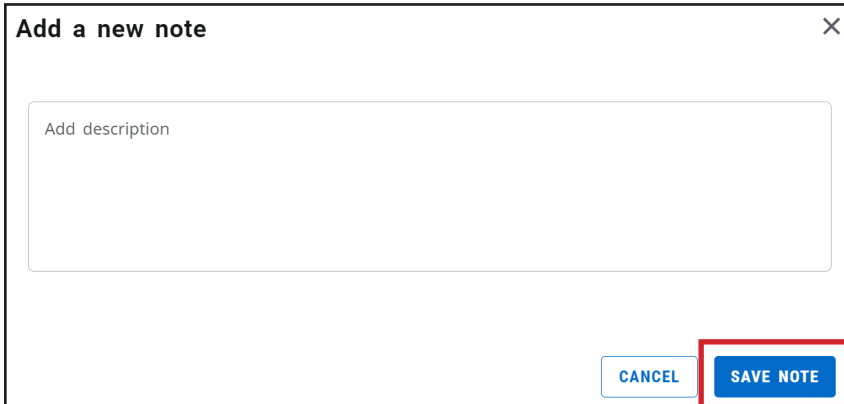You can add a note to a plan, a term, or a course.

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**.

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 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	

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	

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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**.

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.

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

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

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