

DEGREE WORKS STUDENT EDUCATIONAL PLANNER TRAINING MANUAL

OCTOBER 2022

CONTACT

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INTRODUCTION



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

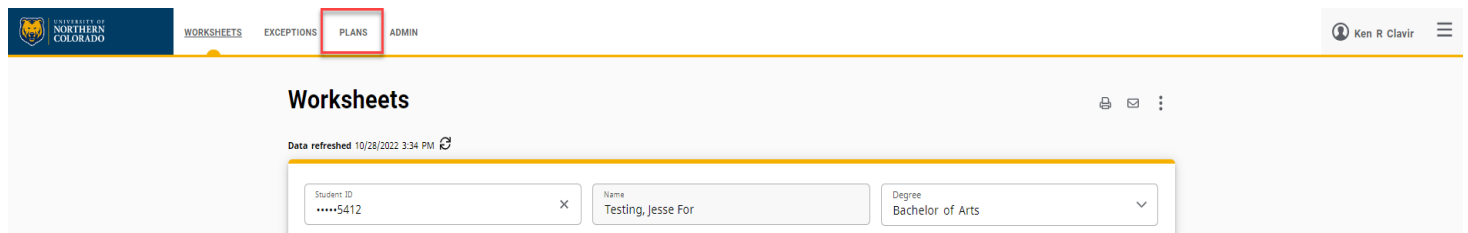
By the end of this manual the user will be able to:

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

PLANS

ACCESS PLANS

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



UNIVERSITY OF NORTHERN COLORADO

WORKSHEETS EXCEPTIONS **PLANS** ADMIN

Ken R Clavir

Worksheets

Data refreshed 10/28/2022 3:34 PM

Student ID *****5412

Name Testing, Jesse For

Degree Bachelor of Arts

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

Plan List

[NEW PLAN](#)

Description	Active	Modified ↓	Who	Degree	Level	Status
22-23 Journalism: Public Relations	No	10/28/2022	Clavir, Ken R	BA	UG	Locked

PLAN TYPES

There are two different options for create a new plan, Blank Plans and Templates.

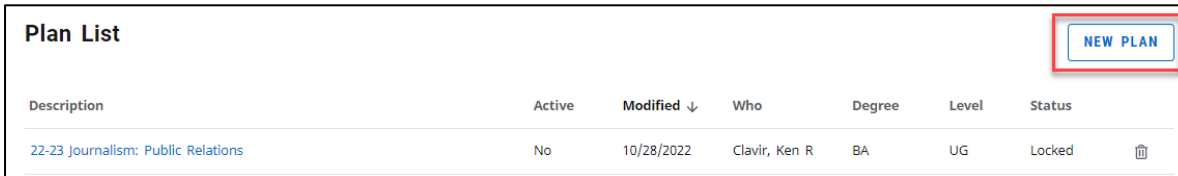
Blank Plans allow you to build a customized plan from scratch.

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

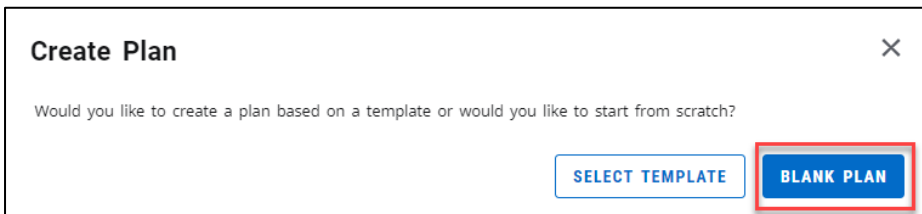
1. Select **New Plan** for the Plan List Block



The screenshot shows a 'Plan List' table with columns: Description, Active, Modified, Who, Degree, Level, Status, and an icon column. A 'NEW PLAN' button is in the top right corner, highlighted with a red box.

Description	Active	Modified ↓	Who	Degree	Level	Status	
22-23 Journalism: Public Relations	No	10/28/2022	Clavir, Ken R	BA	UG	Locked	🗑️

2. Select **Blank Plan**.



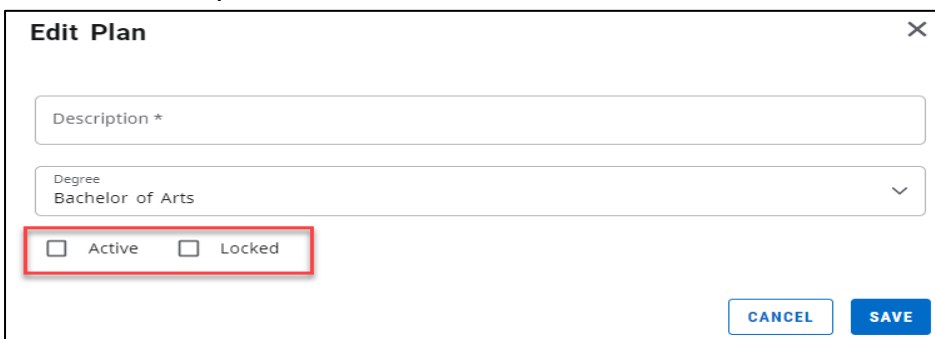
The 'Create Plan' dialog asks: 'Would you like to create a plan based on a template or would you like to start from scratch?'. It has two buttons: 'SELECT TEMPLATE' and 'BLANK PLAN'. The 'BLANK PLAN' button is highlighted with a red box.

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



The 'Select a Starting Term' dialog asks: 'Please select a term to serve as your starting term for this plan'. It has a dropdown menu labeled 'Select term *' with a downward arrow, highlighted with a red box. Below the dropdown are 'CANCEL' and 'SUBMIT' buttons. The 'SUBMIT' button is highlighted with a red box.

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.



The 'Edit Plan' dialog has a 'Description *' text field, a 'Degree' dropdown menu (currently showing 'Bachelor of Arts'), and two checkboxes: 'Active' and 'Locked'. Both checkboxes are highlighted with a red box. At the bottom are 'CANCEL' and 'SAVE' buttons.

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	
22-23 Journalism: Public Relations	No	10/28/2022	Clavir, Ken R	BA	UG	Locked	

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

Create plan from template

Select starting term *

▼

Search templates

Description ↑	Level	College	Major	Degree	Catalog year
20-21 Africana Studies	UG	HS	AFST	BA	2021
20-21 Africana Studies - Spring-Fall	UG	HS	AFST	BA	2021
20-21 Anthropology	UG	HS	ANTH	BA	2021

4. Use the Search Templates field to narrow down the list or select the **name of the template** from the list.

Create plan from template

Select starting term *

Fall 2022

▼


Search templates
Psychology

Description ↑	Level	College	Major	Degree	Catalog year
21-22 Psychology	UG	EB	PSYC	BA	2022
22-23 Psychology	UG	EB	PSYC	BA	2023
23-24 Psychology	UG	EB	PSYC	BA	2024

Page 1 of 1

PLANS

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

21-22 Psychology 

PLAN LIST **NEW PLAN**

Degree Bachelor of Arts
Level Undergraduate
Active No | **Status** Not locked | **Tracking Status** NOT DISPLAYED, PLAN IS NOT ACTIVE

Last updated: Clavir, Ken R on 10/28/2022
[Audit](#) [What-If](#) [Delete plan](#) [Save as copy](#) [Create block](#)

ADD TERM

Fall 2022 Credits: 6.0	Spring 2023 Credits: 3.0	Fall 2023 Credits: 3.0	Spring 2024 Credits: 3.0
+	+	+	+
PSY 120 Credits: 3.0	PSY 166 Credits: 3.0	PSY 200 Credits: 3.0	PSY 201 Credits: 3.0
UNIV 101 Credits: 3.0	Major Requirement Psychology: Core (3 Credits)	LAC Requirement Choose LAC course (3 credits)	LAC Requirement Choose LAC course (3 credits)
LAC Requirement Choose LAC course (3 credits)	LAC Requirement Choose LAC course (3 credits)	LAC Requirement Choose LAC course (3 credits)	LAC Requirement Choose LAC course (3 credits)

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

Edit Plan 

Description *
21-22 Psychology

Degree
Bachelor of Arts

☐ Active ☐ Locked

CANCEL **SAVE**

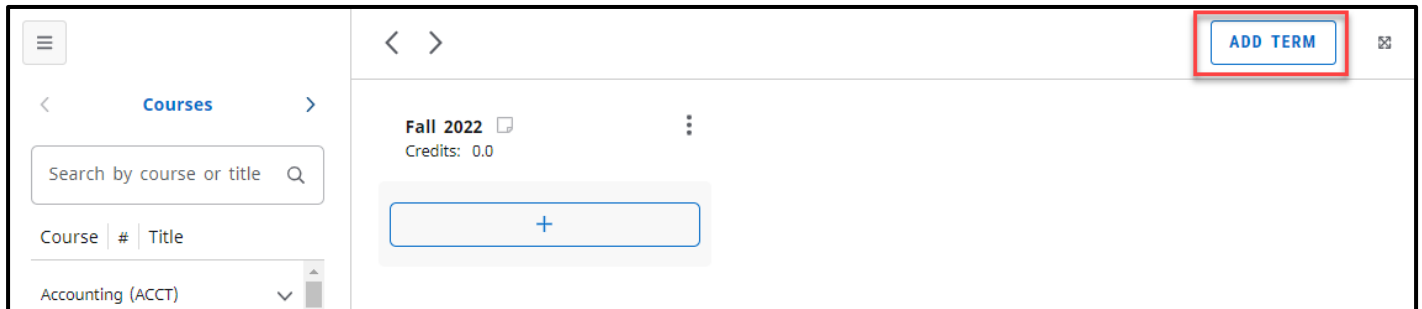
7. Select **Save**.

PLANS

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.



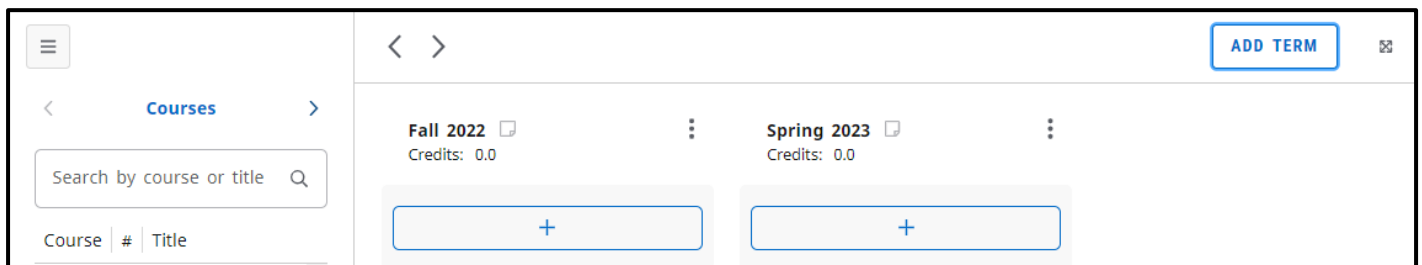
The screenshot shows the 'Courses' screen. On the left is a sidebar with a search bar and a list of courses, including 'Accounting (ACCT)'. The main area displays 'Fall 2022' with 'Credits: 0.0' and a plus button. In the top right corner, the 'ADD TERM' button is highlighted with a red box.

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



The screenshot shows the 'Add Term' modal. It contains the text 'Please select a term to add to this plan.' and a dropdown menu labeled 'Select term *'. The dropdown arrow is highlighted with a red box. At the bottom right, the 'ADD' button is highlighted with a red box, next to a 'CANCEL' button.

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

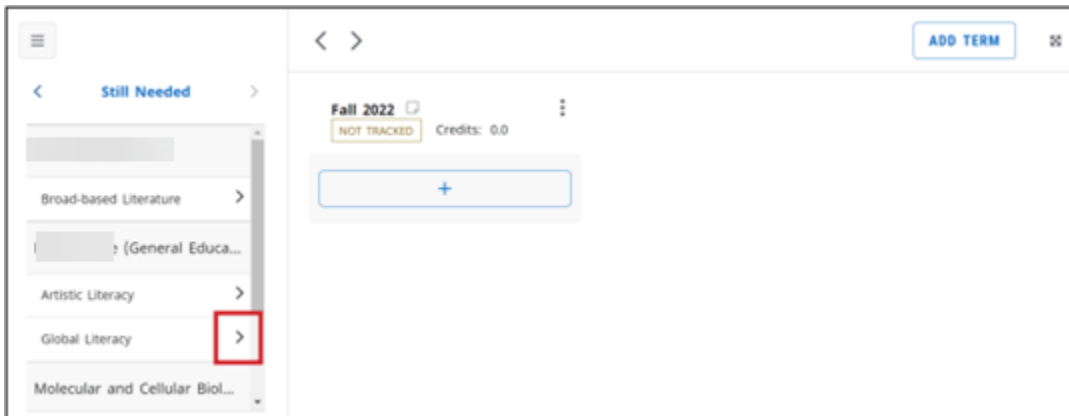


The screenshot shows the 'Courses' screen after adding a second term. The main area now displays two terms: 'Fall 2022' and 'Spring 2023', both with 'Credits: 0.0'. Each term has a plus button below it. The 'ADD TERM' button in the top right corner is still visible and highlighted with a red box.

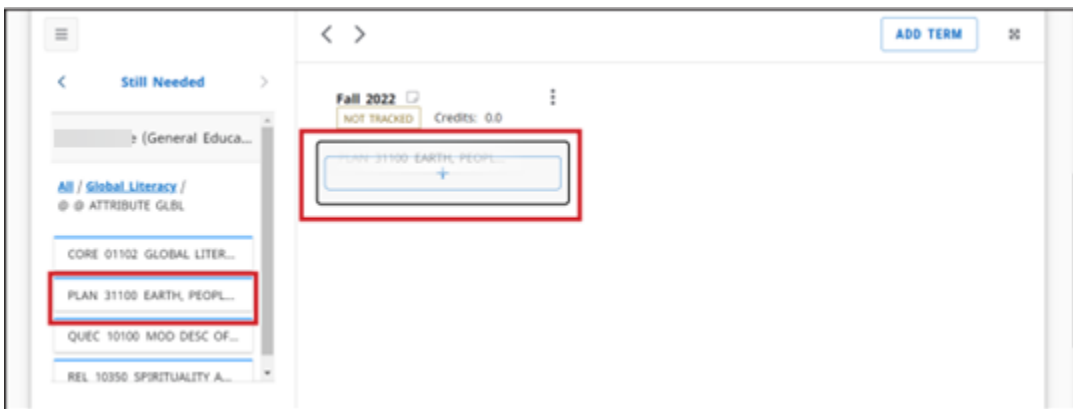
PLANS

ADD A COURSE THAT IS STILL NEEDED

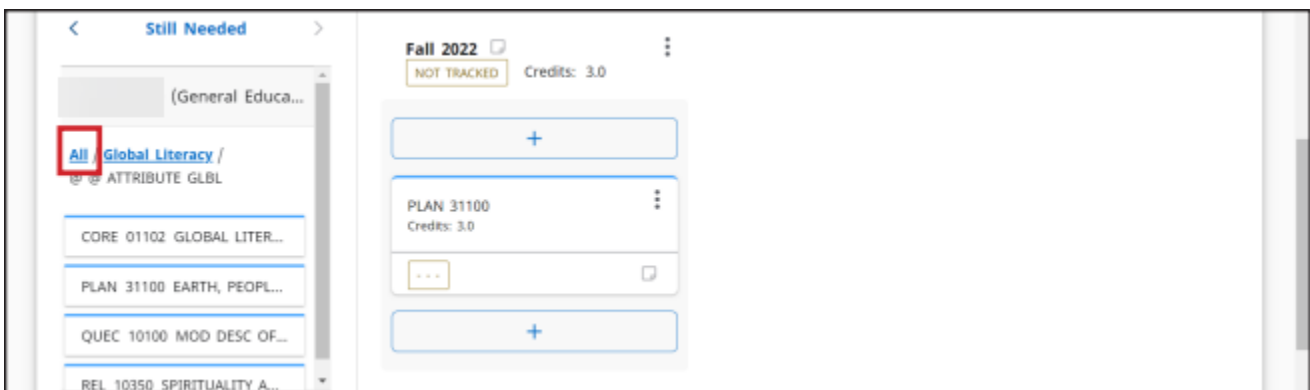
1. On the left side of the screen you will see the categories for the degree requirements that are still needed. Select the arrow next to the category to view the courses.



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.

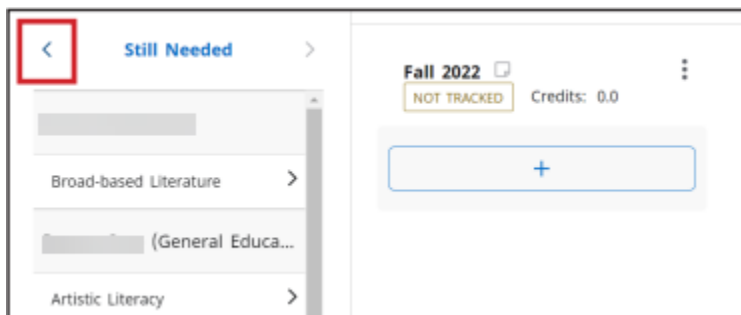


PLANS

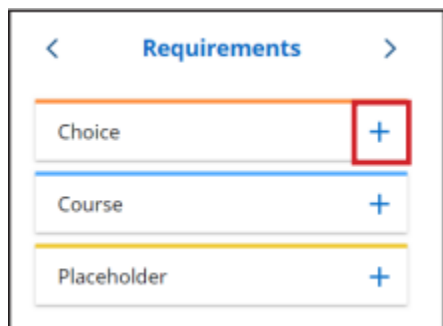
ADD A CHOICE REQUIREMENT

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 (@).

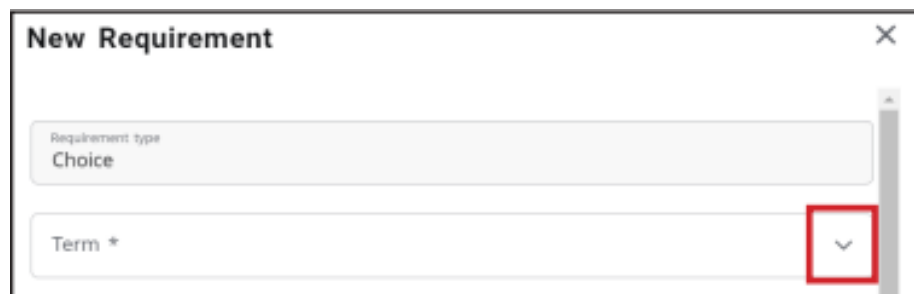
1. On the left side of the screen you will see the Still Needed section. Select the **left arrow**.



2. Select the **+ icon** not to Choice.

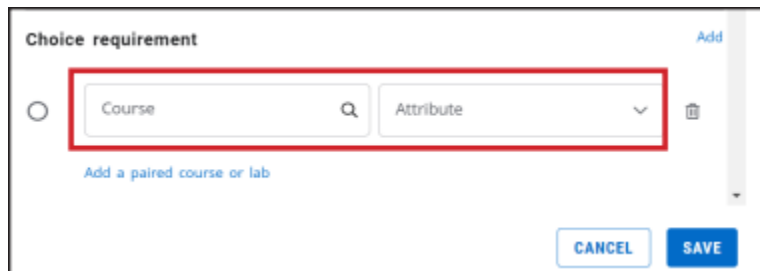


3. Use the term drop-down to select the appropriate **term**.



PLANS

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



Choice requirement Add

☐

[Add a paired course or lab](#)

CANCEL SAVE

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

PLANS

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 graduation@unco.edu.

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

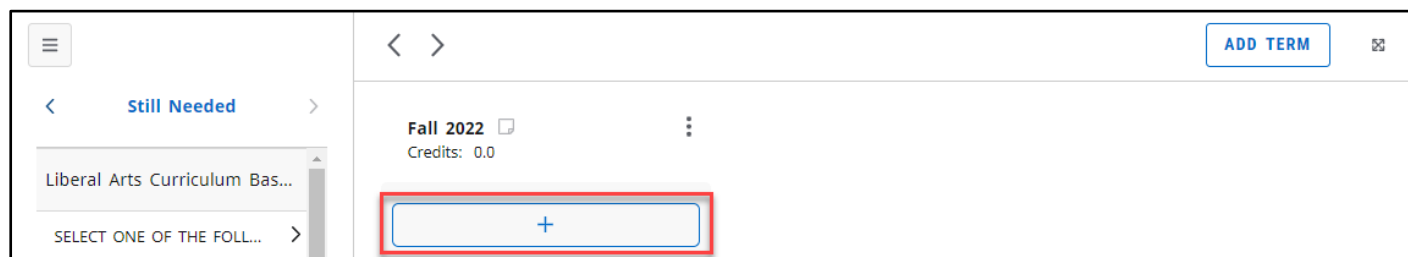
2. Use the drop-down to select the **term** and **placeholder**.

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**.

PLANS

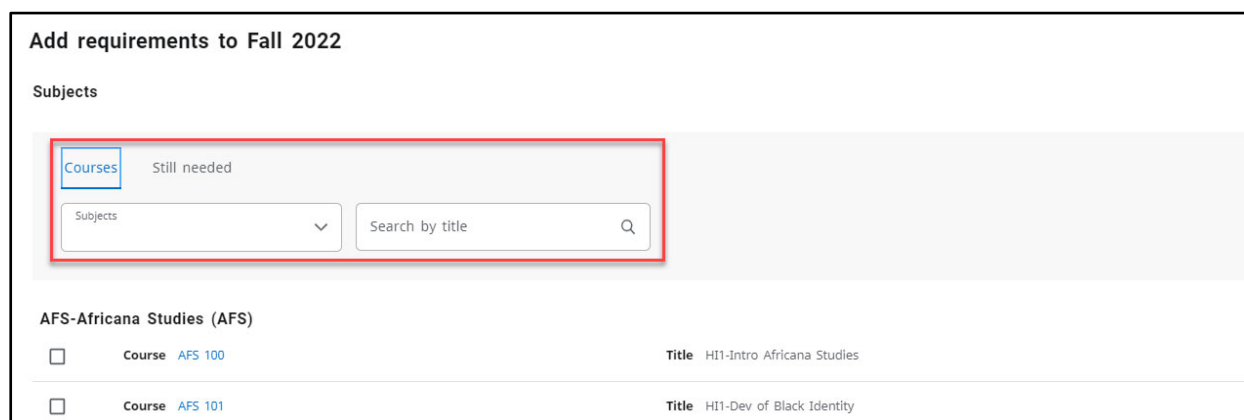
ADD A MULTIPLE COURSES

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



The screenshot shows the 'Still Needed' section of the Plans interface. On the left, there is a list of degree requirements, including 'Liberal Arts Curriculum Bas...'. On the right, the 'Fall 2022' term is selected, showing 'Credits: 0.0'. A red box highlights a button with a plus sign (+) located below the term name, which is used to add courses to the plan.

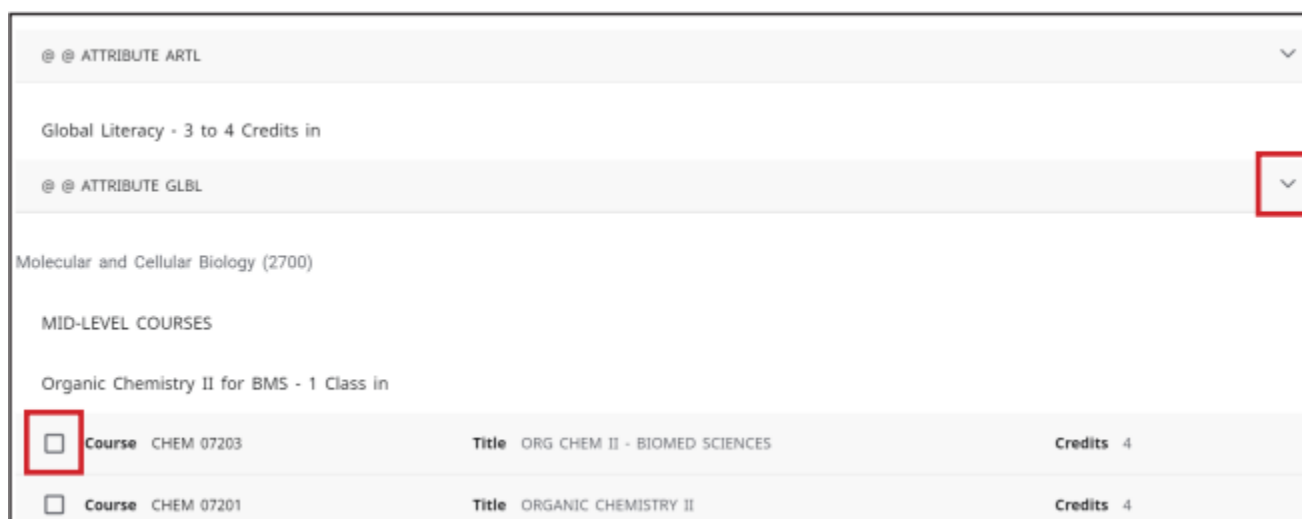
2. The degree requirements that are still needed are listed. Browse through the list or use the Subjects drop-down and Search by title field to search for a specific course. You can also select **Courses** if you would like to search from all courses.



The screenshot shows the 'Add requirements to Fall 2022' dialog. The 'Subjects' section is active, and a red box highlights the 'Courses' tab and the search fields. Below the search fields, a list of courses is displayed, including 'AFS-Africana Studies (AFS)' and 'AFS 100'.

	Course	Title
<input type="checkbox"/>	AFS 100	HI1-Intro Africana Studies
<input type="checkbox"/>	AFS 101	HI1-Dev of Black Identity

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 courses in the Plans interface. A red box highlights a down arrow icon next to the 'Molecular and Cellular Biology (2700)' section, indicating that the section can be expanded. Below the section, a list of courses is displayed, including 'CHEM 07203' and 'CHEM 07201'.

	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**.

The screenshot shows a window titled 'Add to Plan'. It contains a list of selected courses with checkboxes and an 'X' icon to remove them. The courses listed are:

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

Below the list, there is a row of buttons: 'CHEM 07201 X', 'BINF 07310 X', 'MCB 01201 X', and 'PLAN 31100 X'. At the bottom right, there are two buttons: 'CANCEL' and 'ADD TO PLAN'.

5. All the courses will be added to 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.)

The screenshot shows a 'Review Plan' window with three columns representing different terms: Fall 2021, Spring 2022, and Fall 2022. Each column has a header with the term name, a status indicator (NOT TRACKED), and a total credit count. Below the header, there is a list of courses with their status indicators.

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

PLANS

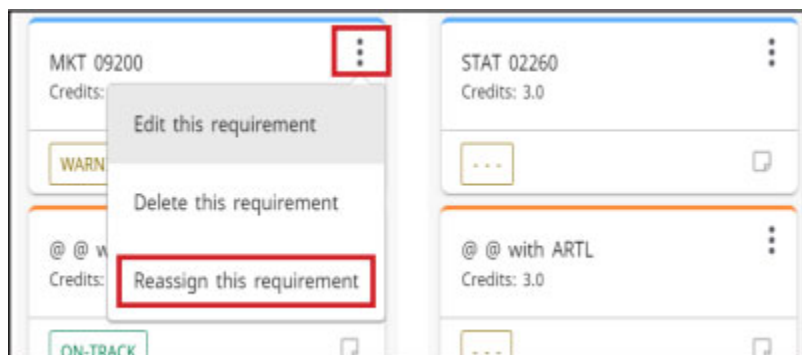
MODIFY THE PLAN

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

Reassign Requirements

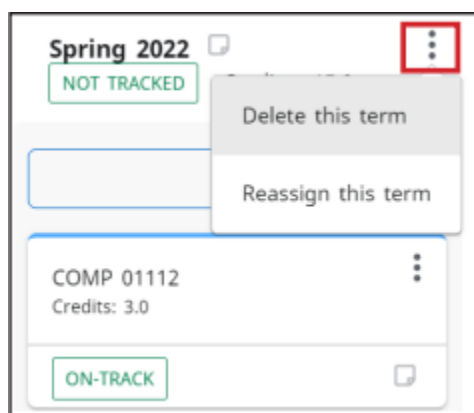
You can move requirements between terms by selecting the requirement, then dragging and dropping it into the appropriate term.

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



Reassign or Delete a Term

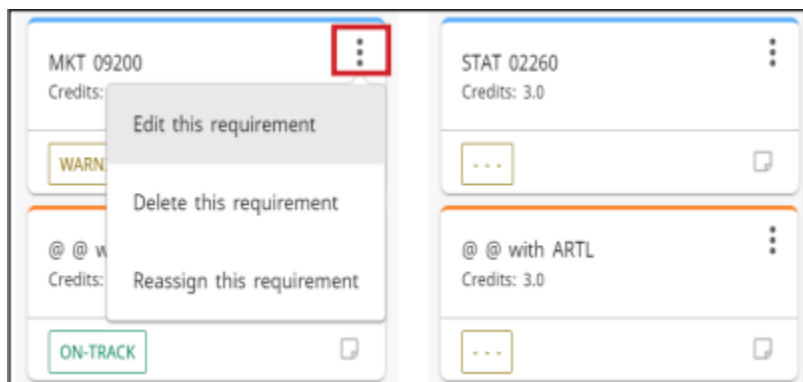
You can reassign or delete an entire term at once. Select the **ellipsis** for the term then select **Delete this Term** or **Reassign this term**.



PLANS

Edit or Delete Requirements

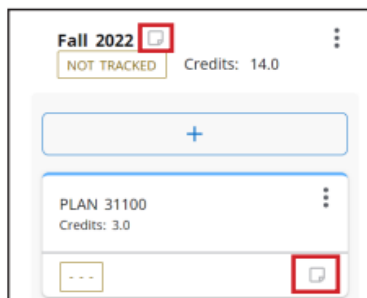
Select the **ellipsis** for the requirement then select **Edit this requirement** or **Delete this requirement**.



Add a Note

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

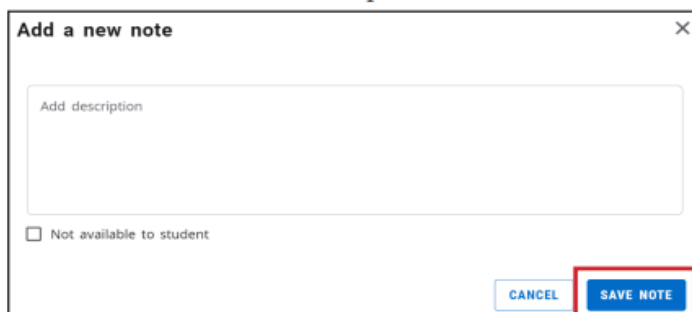
1. Select **note icon**.





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



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



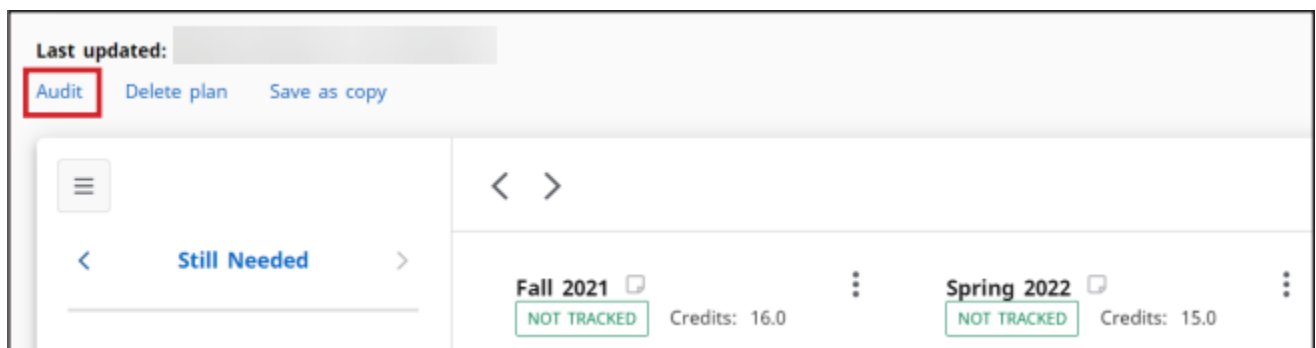
4. Once a note is added the note icon color changes from  gray to  blue on the plan.

PLANS

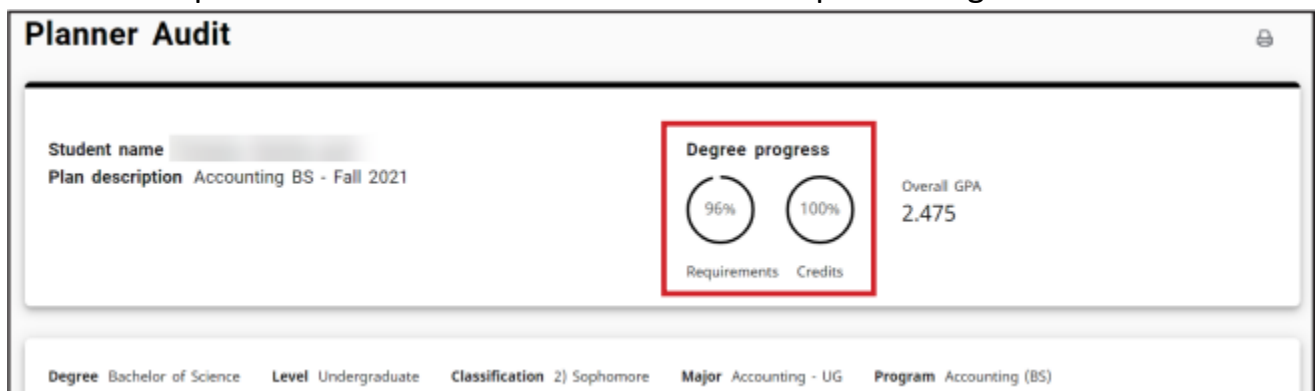
PLANNER AUDIT

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**.



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.

PLANS

	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 University-wide Credits 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.

University-wide Credits					
Credits applied: 3 Classes applied: 1					
Course	Title	Grade	Credits	Term	Repeated
JMS 100	Intro to Journalism	S	3	Spring 2022	