

DEGREEWORKS
STUDENT EDUCATIONAL
PLANNER
TRAINING MANUAL

OCTOBER 2022

CONTACT

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INTRODUCTION

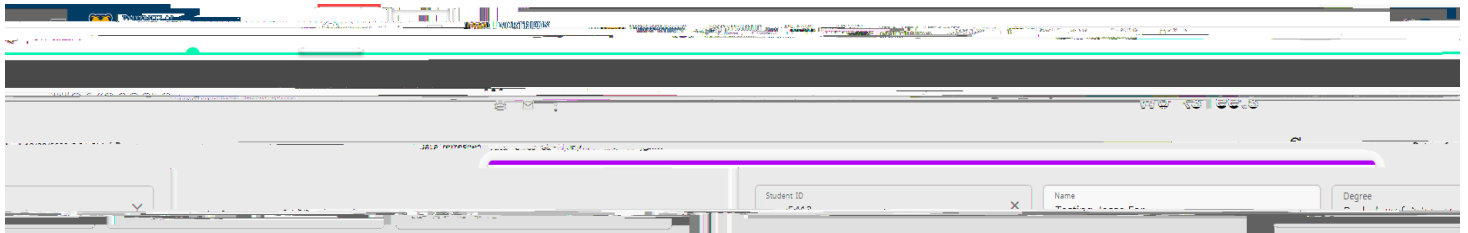
Introduction to DegreeWorks Student Educational Planner

The Degree Works Student Educational Planner (SEP) is an

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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 for create a new plan, Blank Plans and Templates.

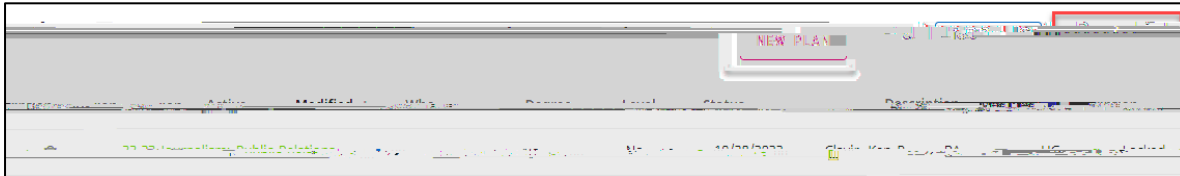
Blank Plans allow you to build a customized plan from scratch.

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.

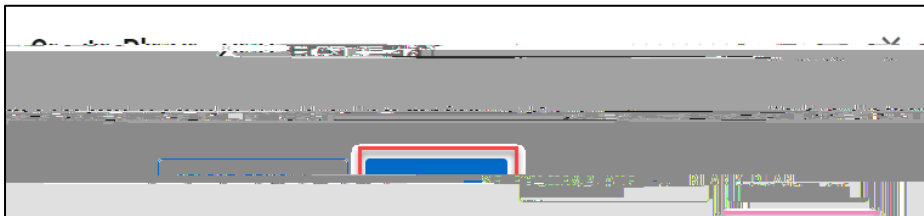
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CREATE A BLANK PLAN

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



2. Select **Blank Plan**

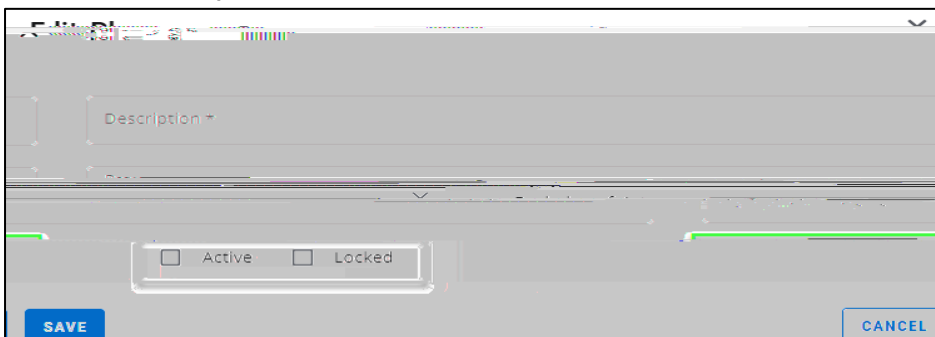


3. Use the drop down to select the **starting term** for the plan. Select **Submit**



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.



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.

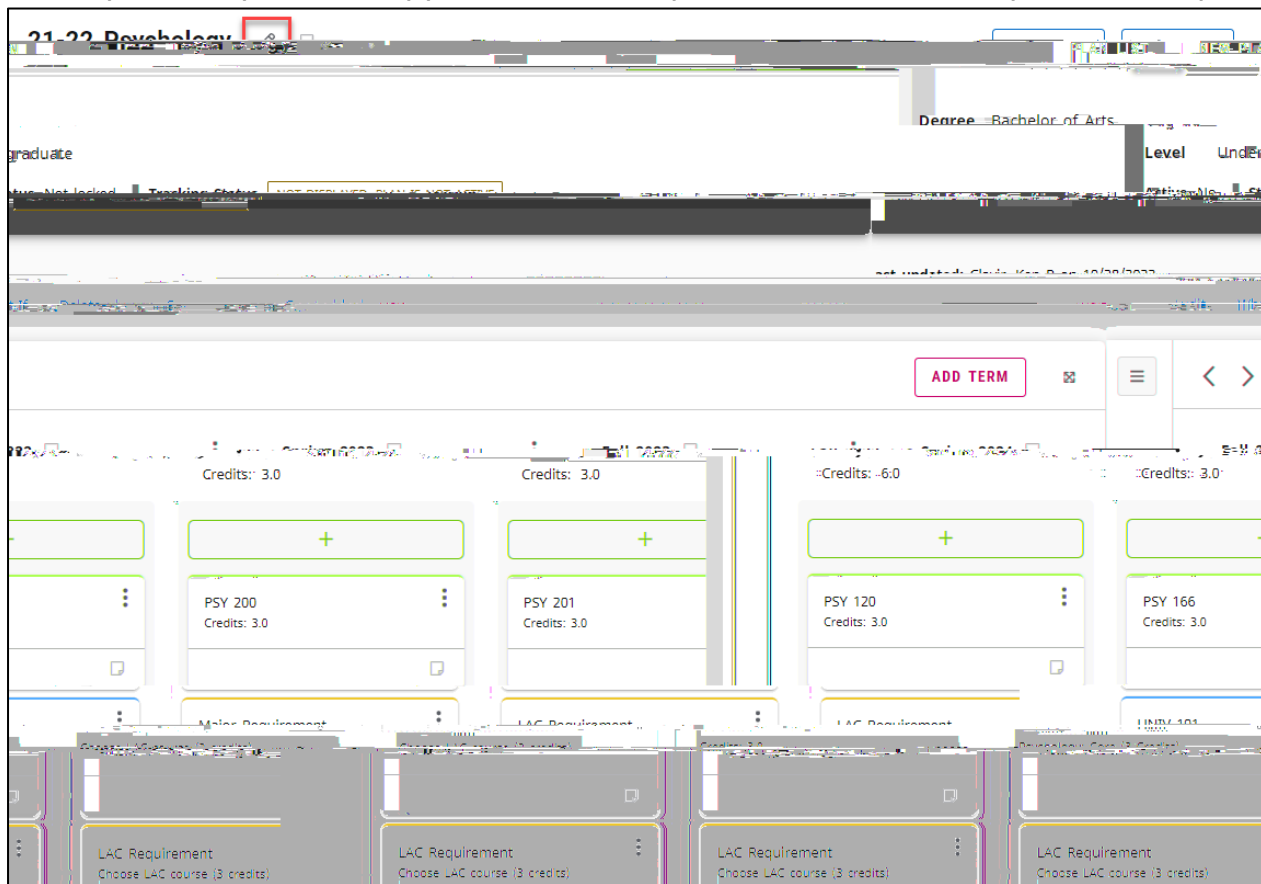
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CREATE A PLAN FROM A TEMPLATE

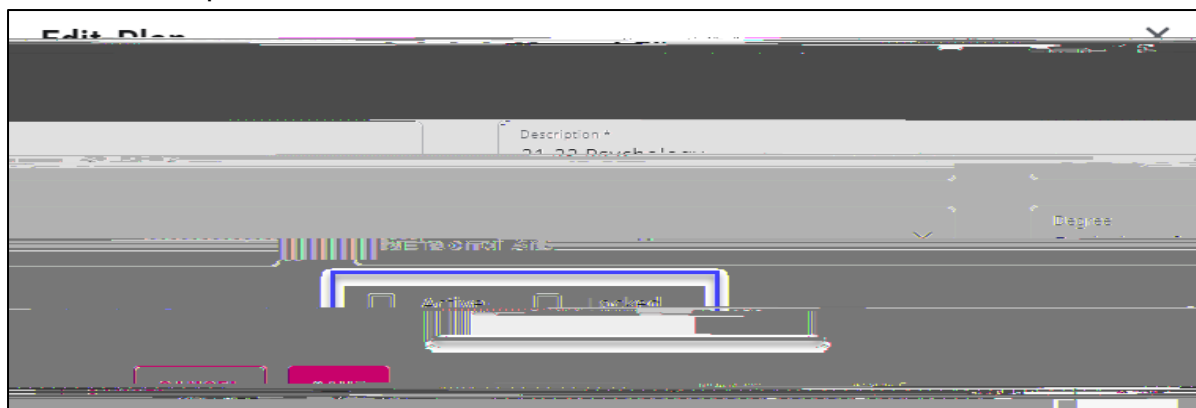
1. Select **New Plan** from the Plan List Block.
2. Choose **Select Template**
3. The list of plans will appear. Use the drop down to

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



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.



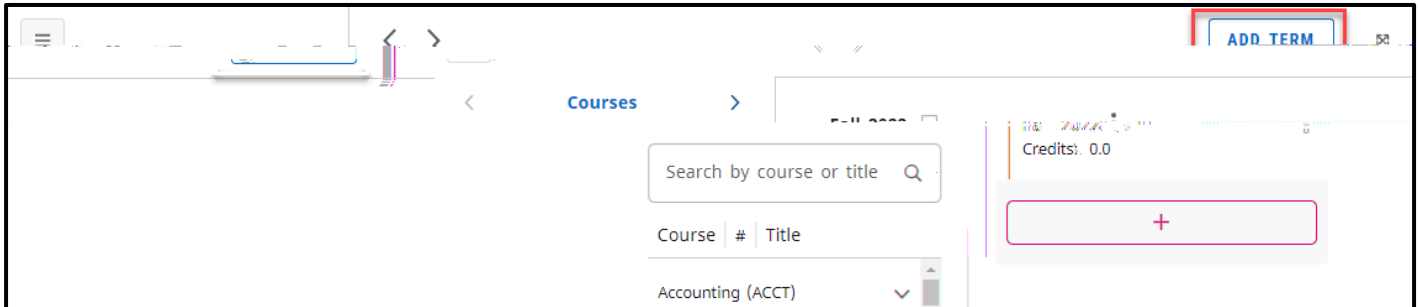
7. Select **Save**

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ADDA TERM

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

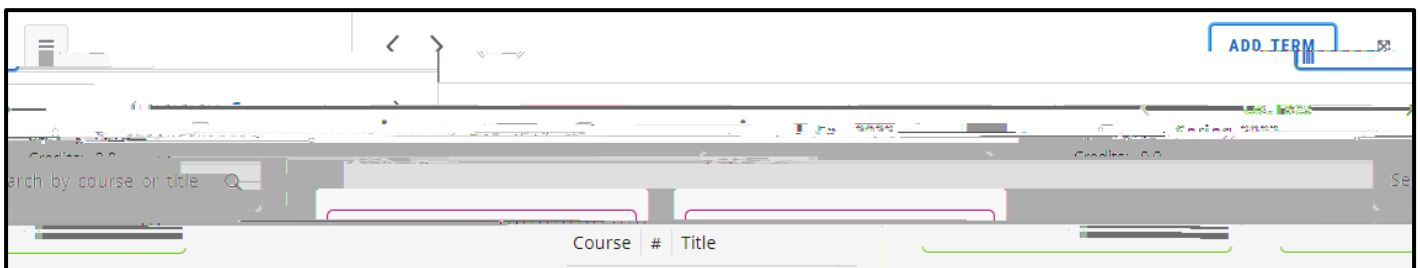
1. Select **Add Term** on the right side of the screen.



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



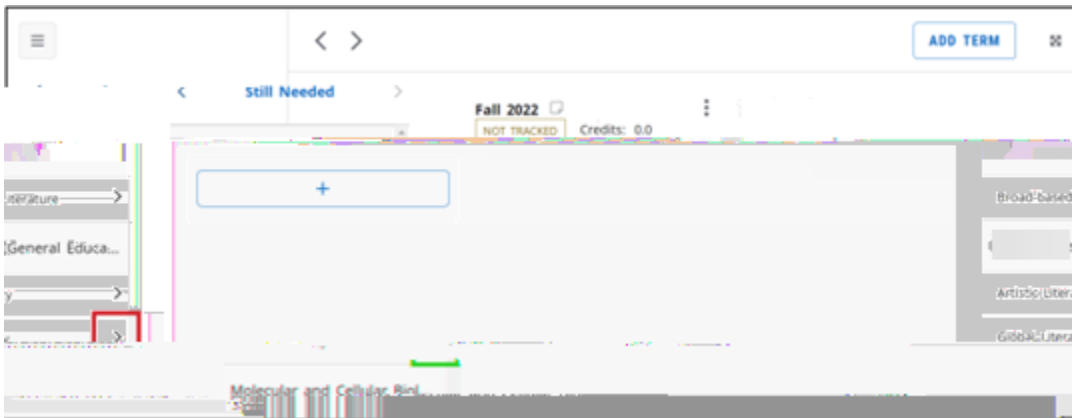
3. The term will appear on the plan. Repeat the process to add more terms.



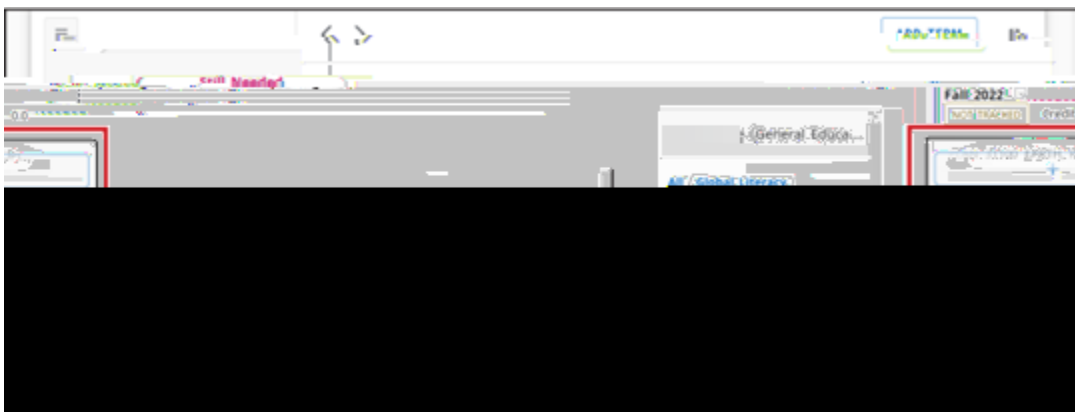
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ADD A COURSE THAT IS STILL NEEDED

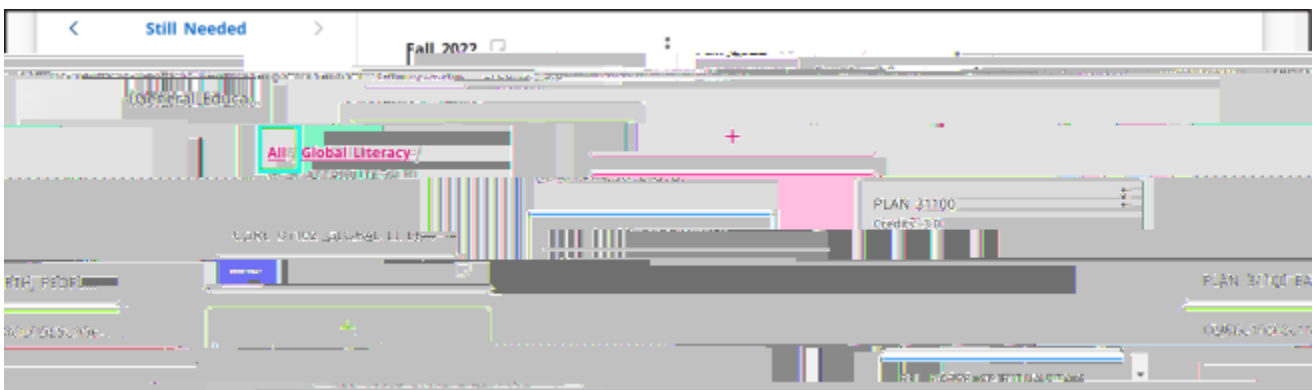
1. On the left side of the screen you will see the categories for the degree requirements that are still needed. Select the arrow next to the category to view the courses.



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.

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

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ADDA 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

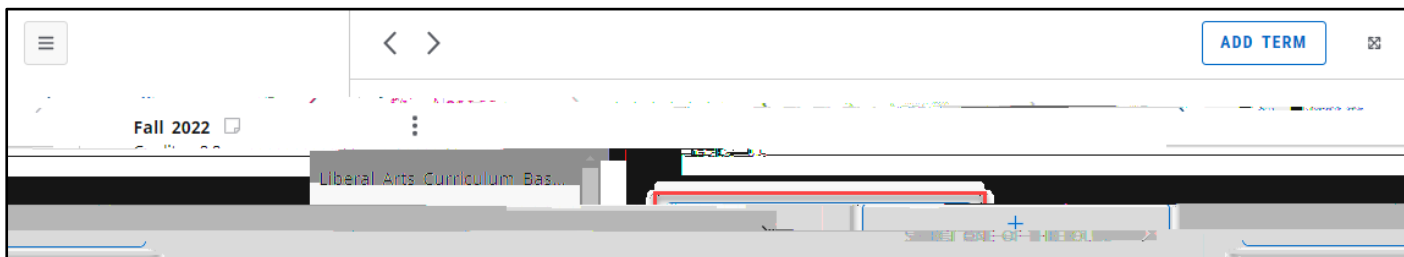
A screenshot of the 'New Requirement' dialog box. The title bar says 'New Requirement'. Below the title bar, there's a 'Requirement type' dropdown menu with 'Placeholder' selected. Below that, there are three input fields: 'Term *', 'Placeholder *', and 'Value *'. Each of the first two fields has a dropdown arrow icon. At the bottom of the dialog, there are two buttons: 'CANCEL' and 'SAVE'.

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**

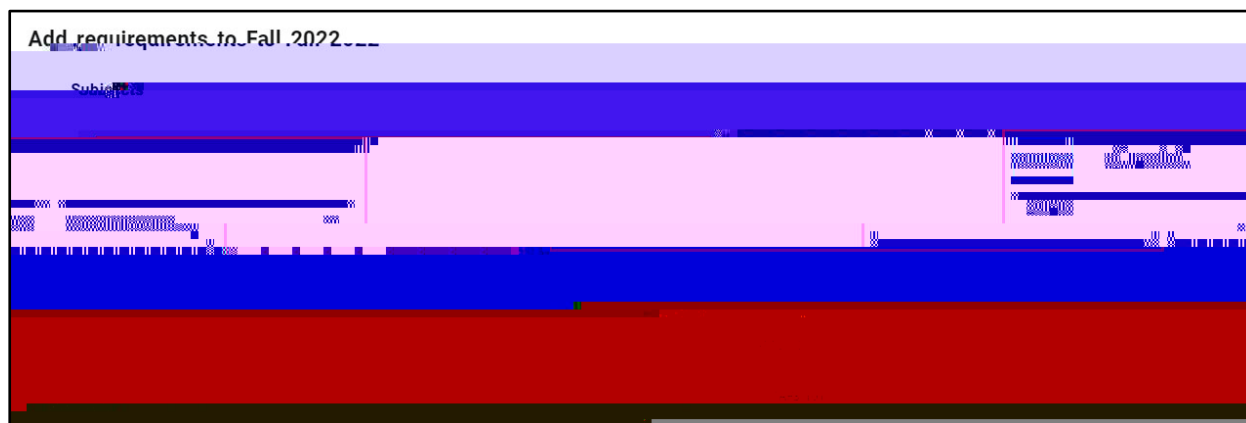
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ADDA MULTIPLE COURSES

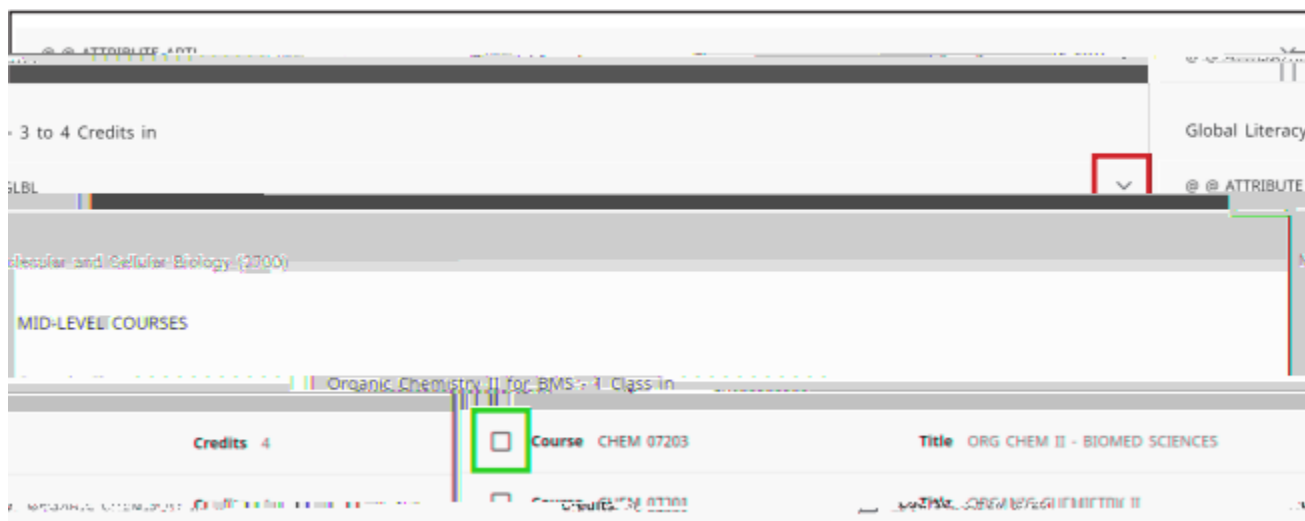
1. Select the + icon under the name of the appropriate term.



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.

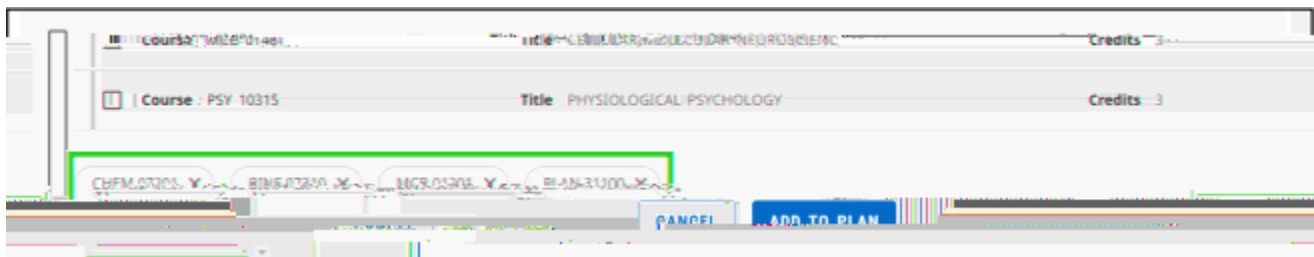


3. You may need to select the down arrow to expand a section. Select the checkboxes for all of the courses you would like to add to the plan.



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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**



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.)



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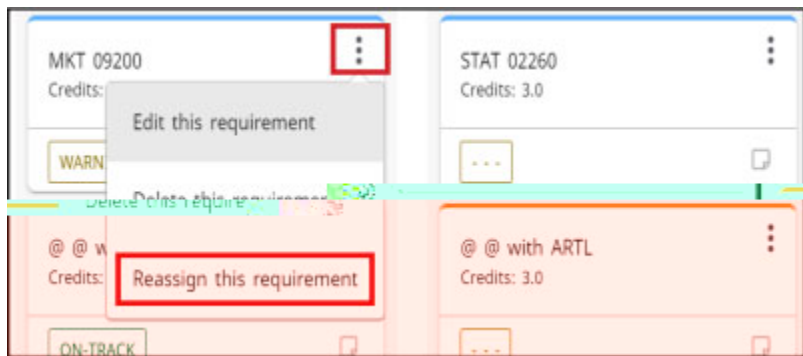
MODIFY THE PLAN

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

Reassign Requirements

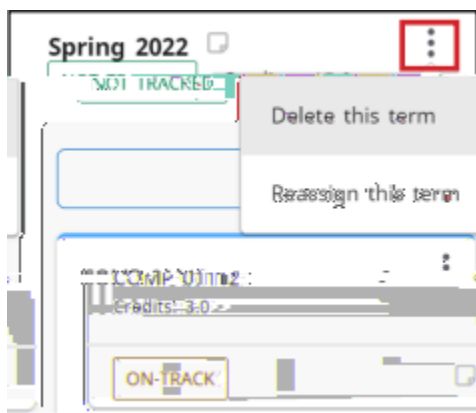
You can move requirements between terms by selecting the requirement, then dragging and dropping it into the appropriate term.

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



Reassign or Delete a Term

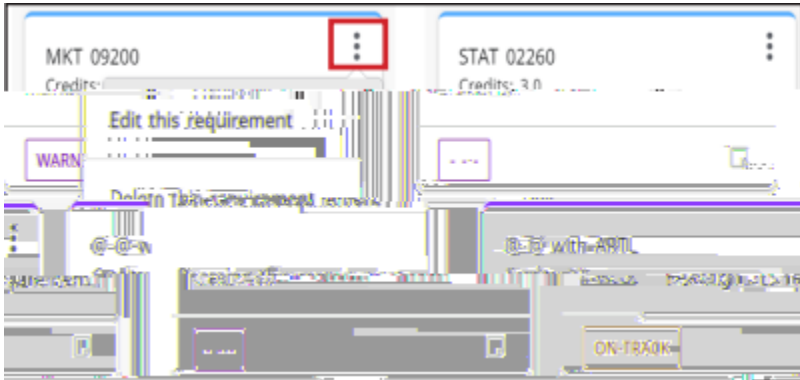
You can reassign or delete an entire term at once. Select the ellipsis for the term then select **Delete this Term** or **Reassign this term**.



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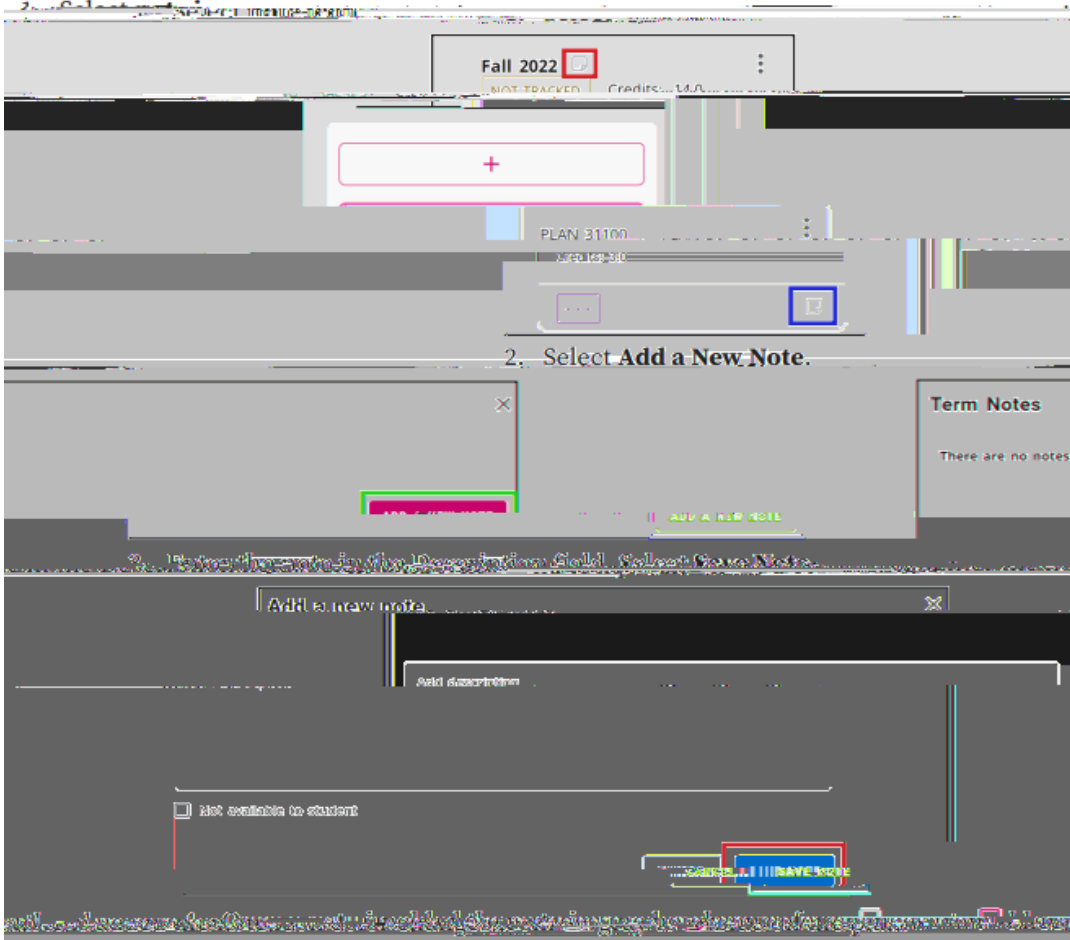
Edit or Delete Requirements

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.



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PLANNER AUDIT

The Audit allows you to view the requirements that are satisfied by the plan you created. This differs from the

