Appalachian State University
DegreeWorks
Training User Guide

For students, DegreeWorks:
- Provides real-time advice and counsel
- Speeds time to graduation
- Provides intuitive web access to self-service capabilities
- Streamlines the graduation process
- Allows direct access to multiple related services and advice through hyperlinks to catalogs, class schedules, transcripts, help desk services, and FAQs

For advisors, DegreeWorks:
- Supports real-time delivery of academic advising through intuitive web interfaces
- Minimizes errors through consistent degree plans
- Supports more timely degree certification
- Reduces paperwork and manual program check sheets
- Supports and monitors unique program changes
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Introduction

What is DegreeWorks

DegreeWorks is a web based tool to help students and advisors monitor student's progress toward degree completion. DegreeWorks combines Appalachian State University’s degree requirements and the coursework the student has completed with easy-to-read worksheet that helps you see how courses that they have completed count toward degree requirements, and that helps you see what courses and requirements they still need to complete. The requirements are displayed in blocks and have a different look then the original checksheets.

When using DegreeWorks, advisors and students will be able to:

- Learn the academic requirements for their degree program(s)
- See how all completed courses apply to degree requirements
- Identify courses needed to complete their degree(s)
- View their grades and academic standing
- View their cumulative grade-point-average (GPA)
- View transfer credit hours earned
- Calculate a GPA based on their performance for the term
- Calculate the grade combination(s) needed to achieve a goal GPA
- Plan for registration in future semesters
- Create What-If audits to process speculative degree audits based on current class history
- Estimate how many semesters it will take to graduate
- And more...!

Important Note: DegreeWorks is designed to aid and facilitate academic advising, but is not intended to replace face-to-face advising sessions. DegreeWorks is neither an official academic transcript nor an official notification of completion of degree requirements.
## DegreeWorks Functionality Summary

<table>
<thead>
<tr>
<th>Degree Checklists Formats</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Student View</strong>&lt;br&gt;(default)</td>
<td>Provides general information about the student's complete and incomplete requirements, in progress and pre-registered courses, grouped into logical sections/blocks.</td>
</tr>
<tr>
<td><strong>Registrar Report</strong></td>
<td>Displays the same information as the Student View, is used primarily by the Registrar's Office.</td>
</tr>
<tr>
<td><strong>Registration Checklist</strong></td>
<td>Shows only the unfulfilled requirements that are &quot;Still Needed&quot; on the checklist.</td>
</tr>
<tr>
<td><strong>What-If</strong></td>
<td>Allows you to process speculative degree audits for a student using their current class history if a student wants to change their major.</td>
</tr>
<tr>
<td><strong>Look Ahead</strong></td>
<td>Allows the display of an audit which includes courses which are still to be taken.</td>
</tr>
<tr>
<td><strong>Class History Link</strong></td>
<td>Provides a listing of all of the courses taken by the student, with grades and credits, grouped by the term taken.</td>
</tr>
</tbody>
</table>

### Planner

| **Student Educational Planner** | Students and advisors use the planner to create an academic plan. |
| **Templates** | Templates are pre-defined plans, or templates for particular programs of study, that can be created ahead of time and loaded for student advising. |

### Notes

<p>| <strong>Add/View Notes</strong> | Use the add function to enter any notes about the student’s audit. Use optional Pre-Defined Notes dropdown to begin note, then Save. This will be utilized during advising sessions. |</p>
<table>
<thead>
<tr>
<th>GPA Calculator</th>
<th>Use the graduation calculator to determine the average grade required to reach a desired GPA.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Term Calculator</td>
<td>Use the term calculator to determine the term GPA based on courses and anticipated grades.</td>
</tr>
<tr>
<td>Advise Calculator</td>
<td>Use the advise calculator to determine the grade and number of credits still required to reach the desired GPA.</td>
</tr>
</tbody>
</table>
Access to DegreeWorks

Single Sign-On

Appalachian State University's AppalNet is your one-stop source for information and resources from the Appalachian State community. Inside, you will find faculty, staff and student resources, including academic information, as well as updated calendars, email, and groups.
# Toolbars

## Navigation Toolbar

<table>
<thead>
<tr>
<th>Tool</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Back to Self Service</td>
<td>Links to Self Service</td>
</tr>
<tr>
<td>FAQ</td>
<td>Links to frequently asked questions pertaining to DegreeWorks</td>
</tr>
<tr>
<td>Help</td>
<td>Links to the DegreeWorks home page</td>
</tr>
<tr>
<td>Print</td>
<td>Allows the user to print current page</td>
</tr>
<tr>
<td>Log Out</td>
<td>Logs user out of DegreeWorks</td>
</tr>
</tbody>
</table>
### Audit Toolbar

<table>
<thead>
<tr>
<th>Find</th>
<th>Unless student Banner ID is known, the find button will be used to search for students</th>
</tr>
</thead>
<tbody>
<tr>
<td>Student ID</td>
<td>Here the user can enter a student’s Banner ID and bring up their audit</td>
</tr>
<tr>
<td>Name</td>
<td>Student name will display here</td>
</tr>
<tr>
<td>Degree</td>
<td>Current student’s degree will be displayed here. The drop down can be used to switch between primary and secondary degree’s</td>
</tr>
<tr>
<td>Major</td>
<td>Current student’s major will be displayed here</td>
</tr>
<tr>
<td>Level</td>
<td>Level of student will be displayed here (Undergraduate or Graduate)</td>
</tr>
<tr>
<td>Campus</td>
<td>Displays the campus location of the student</td>
</tr>
<tr>
<td>Last Audit</td>
<td>Displays the last date an audit was performed for the current student within DegreeWorks</td>
</tr>
<tr>
<td>Last Refresh</td>
<td>Displays the last date and time the audit was refreshed from Banner system</td>
</tr>
</tbody>
</table>
Selecting Students

Known Student ID

If you know the student Banner ID, type the Banner ID in the Student ID field.

Find Student(s)

If you do not know the student’s Banner ID, click Find, which will take you to the Find Students search page.

Find Students search page
Single Student Search

To select a single student, enter the student's Banner ID number in the Student Banner ID field or enter the student's first or last name in the Name fields.

- The First and Last Name fields are not case sensitive. Typing in the first letters of a first or last name will produce a list of all names starting with those letters.
- Wild cards (@) can be used in any of these fields. Entering “@west@” in the Last Name field will produce a list of all students whose last names contain the letters "WEST".

Group Student Search

To search for a group of students, use one or multiple fields to build your search criteria:

- Degree
- Level
- Catalog Year
- Campus
- Major
- Minor
- College
- Concentration
- Academic Standing
- Student Attribute
- Admitted to College
- Student Type

Click Search to execute the search.

- Only valid combinations of search criteria will produce search results.
- Find results are limited to 200 students and, based on your criteria, you may receive a warning message if the results produce a list of more than 200 students.
Once you have created a list of students who meet your selection criteria, you can sort the list by clicking on any of the field headers in the Students Found window.

You can remove or alter the list of students from the selection list by un-checking the checkboxes to the left of the students.

Click **OK** to close the search window and load the list of students into DegreeWorks.

Once loaded, the audit for the first student in your list will automatically display. The drop down option will give the option to select a different student. Only the data for one student at a time can be viewed.
Worksheets
### Information Options

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Format</td>
<td>This format drop-down box lists the different types of audits that are available to view. Format section describes different types.</td>
</tr>
<tr>
<td>View</td>
<td>If you want to view a different type of audit select the option from the drop-down and then click the <strong>View</strong> button.</td>
</tr>
<tr>
<td>Save as PDF</td>
<td>This button will allow you to either save or print the audit while retaining the formatting.</td>
</tr>
<tr>
<td>Process New</td>
<td>This button will run a new audit and apply the information that was recently refreshed.</td>
</tr>
<tr>
<td>In-progress / Preregistered Classes</td>
<td>These options are checked by default. DegreeWorks will include any courses in which the student is currently enrolled in as well as those for which they are pre-registered.</td>
</tr>
<tr>
<td>Class History</td>
<td>Provides a listing of all of the courses taken by the student, with grades and credits, grouped by the term taken.</td>
</tr>
</tbody>
</table>
Format Types

Student View

The **Student View** is the default worksheet format type. It provides general information about the student's complete and incomplete requirements, grouped into logical sections or blocks.
The **Registrar Report** format will be used primarily by the Registrar's Office. This format contains the same information as the Student View with additional detail from Scribe, DegreeWorks' coding tool. However, this report may be helpful to advisors because it presents some scribe detail for each block, and may present hidden block attributes such as hidden course rules and minimum or maximum course or GPA requirements.
The **Graduation Checklist** format displays the same filled and unfilled requirements as the student view without displaying the grades, credits, or terms.
The Registration Checklist format shows only the unfulfilled requirements from the student’s audit. It does not provide any of the detailed explanations of requirements that may be found in the Student View.
The **Student Data Report** displays all the data that has been imported from Banner into DegreeWorks.
The Student Header Information displays a customized view of a student’s program of study.

<table>
<thead>
<tr>
<th></th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Student</td>
<td>Displays student’s Last and First name. Provides the ability to email student directly. See Direct Email section below.</td>
</tr>
<tr>
<td>ID</td>
<td>Displays student’s Banner ID</td>
</tr>
<tr>
<td>Class</td>
<td>Displays student’s class level</td>
</tr>
<tr>
<td>Advisor</td>
<td>Displays all students’ advisor(s) with the primary being listed first. Provides the ability to email student directly. See Direct Email section below.</td>
</tr>
<tr>
<td>Academic Standing</td>
<td>Displays student’s academic standing</td>
</tr>
<tr>
<td>Cumulative GPA</td>
<td>Displays student’s cumulative GPA extracted from Banner</td>
</tr>
<tr>
<td>Hold Status</td>
<td>Displays if a student has a registration hold (Y)</td>
</tr>
<tr>
<td>Level</td>
<td>Displays student’s level of study</td>
</tr>
<tr>
<td>Major</td>
<td>Displays student’s major(s) with the primary being listed first</td>
</tr>
<tr>
<td>Minor</td>
<td>Displays student’s minor(s) with the primary being listed first</td>
</tr>
</tbody>
</table>
### Concentration
Displays student’s concentration(s) with the primary being listed first

### Admit to College
Displays college student is admitted to

### Cumulative Earned Hours
Total number of hours a student has received a passing grade for

### Requirements
Each section in a DegreeWorks audit is called a “Block”. Each block header will contain a title for the block and will also display specific course information for that block such as credits applied and classes applied. Like individual requirements, the block header will also contain a symbol stating the status of all requirements within the block.

### Program

![Business Education (BG)](image1)

![HANDS (Historical and Social)](image2)
## LTOG (Local to Global)

### General Education Requirements

<table>
<thead>
<tr>
<th>Course Code</th>
<th>Course Title</th>
<th>Catalog Year</th>
<th>Grade Required</th>
<th>Semester</th>
</tr>
</thead>
<tbody>
<tr>
<td>RCO 1200</td>
<td>PUBLIC SPACES IN AMERICA</td>
<td>B-</td>
<td>3</td>
<td>Fall 2009</td>
</tr>
<tr>
<td>ENG 1000</td>
<td>EXPOSITORY WRITING</td>
<td>TRB</td>
<td>3</td>
<td>Fall 2009</td>
</tr>
<tr>
<td>ENG 2090</td>
<td>INTRO TO LITERATURE</td>
<td>TRB</td>
<td>3</td>
<td>Fall 2009</td>
</tr>
<tr>
<td>GEP Mat</td>
<td>QUANTITATIVE LITERACY CREDIT</td>
<td>TRC</td>
<td>3</td>
<td>Fall 2009</td>
</tr>
<tr>
<td>MISS 2111</td>
<td>ANALYZING STYLE AND FORM</td>
<td>TRC</td>
<td>3</td>
<td>Fall 2009</td>
</tr>
<tr>
<td>HIS 1100</td>
<td>INTRO TO LITERATURE</td>
<td>TRB</td>
<td>3</td>
<td>Fall 2009</td>
</tr>
<tr>
<td>REL 2151</td>
<td>WORLD RELIGIONS</td>
<td>TRC</td>
<td>3</td>
<td>Fall 2009</td>
</tr>
<tr>
<td>REL 2161</td>
<td>INTRO TO WORLD RELIGIONS</td>
<td>TRC</td>
<td>3</td>
<td>Fall 2009</td>
</tr>
<tr>
<td>SHAPE</td>
<td>AESTHETIC</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Hist 1110</td>
<td>HISTORY AND CULTURE</td>
<td>A</td>
<td>3</td>
<td>Spring 2011</td>
</tr>
<tr>
<td>Hist 1120</td>
<td>HISTORY AND CULTURE</td>
<td>A</td>
<td>3</td>
<td>Spring 2011</td>
</tr>
<tr>
<td>Chem 101</td>
<td>INTRO TO CHEMISTRY I</td>
<td>A</td>
<td>3</td>
<td>Fall 2010</td>
</tr>
<tr>
<td>Chem 102</td>
<td>INTRO TO CHEMISTRY II</td>
<td>B</td>
<td>3</td>
<td>Spring 2011</td>
</tr>
<tr>
<td>Chem 1110</td>
<td>INTRO TO CHEMISTRY LAB I</td>
<td>A</td>
<td>1</td>
<td>Fall 2010</td>
</tr>
<tr>
<td>Chem 1120</td>
<td>INTRO TO CHEMISTRY LAB II</td>
<td>B</td>
<td>1</td>
<td>Spring 2011</td>
</tr>
</tbody>
</table>

**Still Needed:**
- 2 Credits in Wellness Literacy courses required. You have taken 0 credit(s) and need 2 more.
- 4 Credits in Quantitative Literacy courses required. You have taken 3 credit(s) and need 1 more.
- 2 Credits in Wellness Literacy courses required. You have taken 0 credit(s) and need 2 more. To receive Wellness Literacy credit for a PE Activity transferred from another institution, students must complete 2 online wellness modules and submit the certificates of completion to the Department of Health, Leisure, and Exercise Science. 3 modules are required for each credit hour of PE activity credit. For access to the modules (fee applies for access) please visit: https://www.bsa.purstate.edu/ (wellness-literacy-modules for access to the modules (fee applies for access).
NOSEL (Non-Selected)

Major

Minor
Concentration

<table>
<thead>
<tr>
<th>Concentration in Computer Information Systems (SAC)</th>
<th>Catalog Year: 2010-2011</th>
<th>Credits Required: 16</th>
</tr>
</thead>
<tbody>
<tr>
<td>Unmet conditions for this set of requirements:</td>
<td>10 semester hours are required. You currently have 1, you still need 10 more semester hours.</td>
<td></td>
</tr>
<tr>
<td>- Info Systems for Business &amp; Ed Professionals</td>
<td>Still Needed: 1 Class in B_E 3380</td>
<td></td>
</tr>
<tr>
<td>- Computer Apps for Business &amp; Ed Professionals</td>
<td>Still Needed: 1 Class in B_E 4650</td>
<td></td>
</tr>
<tr>
<td>- Fundamentals of Management Information Systems</td>
<td>CIS 2050</td>
<td>IT INF OF INFORMATION SYSTEMS -- (2) Fall 2011</td>
</tr>
<tr>
<td>- Building Information Systems</td>
<td>Still Needed: 1 Class in CIS 3250</td>
<td></td>
</tr>
</tbody>
</table>

Other Blocks

Additional blocks maybe displayed depending on the student’s program.
Legend

The legend contains all of the unique symbols that are important for interpreting the DegreeWorks audit.

Complete – This symbol will appear beside all requirements that have been completed within the audit. The row will be highlighted light yellow and will display the course(s) that fulfilled the requirement along with the grade and term in which the course was taken.

Not Complete - This symbol will appear beside all requirements that have not yet been completed. The row will be highlighted in pink and will also indicate the course(s) that will be required to complete the requirement.

Pre-requisite: Course numbers that are followed by an * indicate that the course contains prerequisites. Not all courses that have pre-requisite have an *. Please check the schedule of classes to see if pre-requisite exists.

Course Links – When a requirement has not yet been completed, the audit will display courses that are required to complete the requirement. These courses are also hyperlinks, that when clicked, will display catalog information about the course.
In-Progress – This symbol will appear for requirements where the classes needed to fulfill the requirement are currently being taken or are registered to be taken for a future term. The row will be highlighted light blue and the grade section for the course will display (IP).

Nearly Complete – This symbol will appear when all the course requirements have been met but there are additional requirements that have not. Example minimum grade, minimum GPA, etc...

DegreeWorks Wildcard (@) - The “@” symbol in DegreeWorks works as a wildcard. This means that it represents all classes when used as a prefix, and can also be used to represent all course numbers. When a course prefix is followed by the @ symbol (CHE @) this means any course number for that prefix can be used to fulfill the requirement.

Optional Blocks

Optional Blocks: These blocks may or may not display depending on if the student has courses that fall into these areas.

Fall-Through: Any course that does not fulfill a specific requirement will show up here. These hours count toward graduation, but are not used elsewhere. The only exception is pre-requisites. For pre-requisites the requirement in the major/minor block will display as complete, but the course itself will slot here. This is a great place to look for areas the student could pick-up an additional minor, program, emphasis or concentration.

Insufficient: Courses in which a student does not earn the minimum required grade, WP, WF, or audited (AU) the course (rather than taking it for credit) display here.

In Progress: The courses the student is currently enrolled in are listed here, in one place, in addition to displaying where they fit throughout the audit.
Exceptions: Any exceptions granted to the student are referenced both where the exception is applied and here.

Notes: Anyone that has access to DegreeWorks can see the notes, including the student. Notes are helpful when the student is referred to another office, approved for transfer or study abroad coursework, or working with multiple advisors.

Disclaimer

This language will show at the bottom of most screens and is intended to counsel users of the limits of the information presented here and the sources that can provide official confirmation.
What-If Audit

Students, who plan on changing their major, adding a minor or a concentration, or looking to enroll in a specific college, can access the What-If Audit. The What-If Audit can be found under the worksheets tab, on the left menu; it is designed to offer students an opportunity to view how proposed changes can affect their path towards graduation.

Select a combination of Level, Degree, Catalog Year, Majors, Minors, College, or Concentration.

- Proper combinations of above items will only produce an What-If Audit
• Note about catalog year: Banner and thus DegreeWorks will automatically select the catalog year the student first enrolled. If a student would prefer to complete his/her requirements under a more recent catalog, that is possible, but the declaration would need to be updated with the Dean’s Office.

Click **Process What-If** button to see the results

Click **Save as PDF** button to save/print What-If Audit

• What-If Audits are not stored in the database. After they are run, the results can be saved or printed using the Save as PDF button. Navigating away from What-If screen the audit cannot be accessed again. It is possible to run another What-If Audit with the same parameters.
**What-If Audit Options**

The What-If Audit can include any courses in which the student is currently enrolled as well as those for which they are in-progress and/or pre-registered. To not have these classes displayed on the What-If Audit uncheck one or both of the boxes.

The What-If Audit can include unregistered classes the student plans to take in the future.

Type in future **Subject** and **Number** and click **Add Course** button

- Multiple courses can be added

- Use **Find** button to search catalog for courses

Click **Process What-If** button to see the results

Click Remove Course button to remove unwanted courses from list
Look Ahead

The Look Ahead allows the audit to reflect unregistered classes the student plans to take in the future. As with the What-If, it is important to remember that these audits are not saved, but can be printed and run again. The Look Ahead function is available on both the What-If and on the Checklist tab.

Type in future Subject and Number and click Add Course button

- Multiple courses can be added
- Use Find button to search catalog for courses

Click Process What-If button to see the results
The What-If Audit can include any courses in which the student is currently enrolled as well as those for which they are in-progress and/or pre-registered. To not have these classes displayed on the What-If Audit uncheck the boxes.

Click Remove Course button to remove unwanted courses from list
Freezing An Audit

To freeze an audit and to recognize why it was frozen, enter a Description and choose the appropriate Category of audit from the pull down.

Click Save button to save audit.

<table>
<thead>
<tr>
<th>Degree Awarded</th>
<th>Audit is frozen when degree is awarded for historical purpose</th>
</tr>
</thead>
<tbody>
<tr>
<td>Frozen by Advisor</td>
<td>Audit is frozen by advisor to save or print</td>
</tr>
<tr>
<td>Graduation Check</td>
<td>Audit is frozen by Registrar Office when reviewing for graduation satisfaction of requirements</td>
</tr>
</tbody>
</table>

- Please do this sparingly and only as needed—not every single time you access or process a new audit for an individual student. Otherwise, we could build up a lot of frozen audits on the server. The Save as PDF button mentioned above should be the primary way of saving an audit.
Reviewing A Frozen Audit

Choose History from the left side menu to view frozen audit

Choose from the drop down list the preferred audit

<table>
<thead>
<tr>
<th>View</th>
<th>Choose from the drop down list the audit to be viewed and click View button</th>
</tr>
</thead>
<tbody>
<tr>
<td>Delete</td>
<td>Choose from the drop down list the audit to be deleted and click Delete button</td>
</tr>
<tr>
<td>Save as PDF</td>
<td>Choose from the drop down list the audit to be saved/printed and click Save as PDF button</td>
</tr>
</tbody>
</table>
Direct Email

DegreeWorks provides the capability to email a student and/or advisor directly from within the audit.

Advisor emailing the student

Click on the student’s name and an outlook email pop up window will appear.

Student emailing the advisor(s)

The student will click on the advisor’s name and an outlook email pop up window will appear.
The Student Educational Planner (SEP) is a tool in DegreeWorks that students and advisors use to create academic plans. Pre-defined plans, or templates for particular programs of study, can be created ahead of time and loaded for student advising. Once a plan is populated it may be modified as needed. The SEP format allows courses from the degree audit to be pulled into the plan with a simple drag-n-drop action.
Planner Header

The Header controls how the page displays and operates.

Plan List: If no plan exists the drop down box will display ‘-----Add new plan------’. If plans exist the active plan name will display. To see all available plans for a student use the pull down arrow.

Mode Section: The plan can be displayed in two different formats.

Notes mode: Notes mode is the default mode. Notes can be created for each term included in the plan.
Calendar mode: Notes can be created for the entire plan.

- These notes are for comments about the term being planned, and not for general advising.
- Use Audit notes for advising notes.
- These notes are not a historical record as it does not record who made the note or when. The note can be modified until the term has passed.

Planned vs taken: This is a grid display allowing the comparison of planned course to those actually taken by the student. (This display is only available in View mode, not Edit mode)
**Show Completed courses checkbox:** This is checked by default. If checked, the plan will show classes taken for past terms and the current term instead of planned courses. It also will not allow modification of past terms to guard against saving completed courses into Planner terms.

- Once a plan is saved work completed before the first term in the plan is displayed at the bottom of the plan as “Classes Completed in Unplanned Terms” if completed in residency and “Transfer classes” if the work was completed at another institution.

**Load Button:** Once the mode that you wish to view the planner in is selected, click **Load**. (The Load Button must be clicked before the changes will take effect.)

- Use the Load button to refresh the plan once it has been saved. This works in conjunction with the “Show Completed Courses” once the plan has been saved, it needs to be refreshed to see any course work taken before the plan started.

**Edit checkbox:** Edit allows users to modify the plan. Select Edit to create, change or delete plan.

**View checkbox:** View provides a printable report. (Planned vs. Taken assumes View mode even if the View checkbox is not checked.)
Student Information Block

This includes detailed information about the student’s academic plan.

<table>
<thead>
<tr>
<th><strong>Student Educational Planner</strong></th>
<th><strong>Print</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Student</strong></td>
<td>Mountaineer, Yosef</td>
</tr>
<tr>
<td><strong>Current Term</strong></td>
<td>2011 Summer1</td>
</tr>
<tr>
<td><strong>Description</strong></td>
<td></td>
</tr>
<tr>
<td><strong>Catalog Year</strong></td>
<td>2009-2010</td>
</tr>
<tr>
<td><strong>Last Modified</strong></td>
<td></td>
</tr>
</tbody>
</table>

- **Active Plan**
- **Locked**

Load in a pre-defined plan

<table>
<thead>
<tr>
<th><strong>Student</strong></th>
<th>Displays student’s name</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Current Term</strong></td>
<td>Represents the last term that the student had registered or completed coursework. Planning starts at the last term that the student had academic work. The intent is to plan from the last term forward.</td>
</tr>
<tr>
<td><strong>Description</strong></td>
<td>Name for this student’s plan. The template plan name will default if templates are used. This is a required field.</td>
</tr>
<tr>
<td><strong>Catalog Year</strong></td>
<td>The academic year is the year the plan starts.</td>
</tr>
<tr>
<td><strong>Last Modified</strong></td>
<td>Displays the last date the plan was modified.</td>
</tr>
<tr>
<td><strong>Active Plan</strong></td>
<td>The student can have multiple plans but only one plan can be active at one time. Students currently do not have access to build their own plans. Advisors will build one plan and modify it as the student advances in his/her academic career.</td>
</tr>
<tr>
<td>Locked</td>
<td>This will be used if the student needs to have more than one plan, or if the students eventually have access to create plans. The locked plan is locked by the advisor and once locked is not modifiable until unlocked by the advisor.</td>
</tr>
<tr>
<td>--------------</td>
<td>--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Load in a pre-defined plan</td>
<td>Pre-defined plans (templates) can be created and loaded student by student.</td>
</tr>
</tbody>
</table>
Planner Worksheet

- Two windows display, one with the student’s audit (left) and one with the planner blocks (right)

- Bar separating the two windows can be moved right or left to increase one side

- Entering course into the plan can be done two ways.
  - Dragging and dropping the courses from the audit will automatically add the credit hours
  - Manually typing them in the credits will have to be manually typed in

- Hours will total at the end of each block

- Click check all terms or click the box next to the terms you would like to see in the audit
# Planner Toolbar

<table>
<thead>
<tr>
<th>Action</th>
<th>Description</th>
</tr>
</thead>
</table>
| Save Plan            | Saves contents of plan, when the plan is saved, several checks are made on the data. The errors must be fixed before the plan can be saved.  
  - Courses are validated  
  - Duplicate courses are identified  
  - A red arrow appears next to courses that are invalid |
| Process New          | Runs a new audit with planned courses from saved plan applied to audit rules |
| Reload Form          | Start over. Deletes any editing since the plan was last loaded. If the plan has never been saved, then it clears the plan entirely, similar to ‘-----Add new plan------’. |
| Check All Terms      | Check the boxes for all future terms to be included in a new audit           |
| Save As              | Save the data as a new plan                                                 |
| Uncheck All          | Uncheck all boxes for all future terms                                      |
| Delete Plan          | Delete this current plan – confirmation message appears                     |
Planner Templates

Pre-defined plans, or templates for particular programs of study, can be created ahead of time and loaded for student advising. The use of a template does allow a plan to be modified after the template has been loaded onto the student.

To create a new template:

- Click on **Templates** under the **Planner** tab
- Click on **Search**
- Click on **Add new template** (As more and more templates are created, more options will appear in this drop down box.)
Choose **Notes Mode** or **Calendar Mode**.

Click **Load**

Choose the parameters for the template you want to create (be as specific or as general as you need or want), provide a description, and begin filling in the blanks. Use the buttons at the bottom to undo changes, delete, clear, or save the template.

- DegreeWorks will automatically assign it a number (i.e., T0012345). However, if you provide a good description for the template that will make it easier to locate when later searching for a template.

Use the buttons at the bottom to undo changes, delete, clear, or save the template.
Developing a Plan - Freestyle

Select Add new plan

Choose mode (Notes or Calendar). Notes mode is the default and should be the standard for creating plans.

Choose to show completed classes or not to show completed classes

Choose Edit

Click Load button

Type in description of plan (required field)

Choose Catalog Year
Select term and Enter courses into plan

Click **Save** button once all terms are completed
Developing a Plan – Using Templates

Select Add new plan

Choose mode (Notes or Calendar) Notes mode is the default and should be the standard for creating plans.

Choose to show completed classes or not to show completed classes

Choose Edit

Click Load button

Click Load a pre-defined plan
The search fields are populated as a result of the student’s current curriculum.

Click Search. If no plans are returned as a result of the search parameters that indicates that no plan template is available for that student’s current academic curriculum. Either clear the search fields to find one similar or build the SEP freestyle.

Select the plan

Click the ‘Load into my plan’ button.
Modify as needed

Click **Save** button once all terms are completed
Notes

The Notes utility allows DegreeWorks users to document academic advising on student records. These Notes are viewable by the student on their audit in the Notes section at the bottom of the Worksheet.

Please be aware that notes entered in DegreeWorks are part of the students educational record and will be disclosed as part of that record when complying with any legal requests for the release of information in that educational record. Notes should be factual and of a nature under public scrutiny.
Add Notes

Click on Add Notes on the Notes Tab

You can use the optional Pre-Defined and/or free type the note

Click Save Note

Click Run New Audit button to display notes in View section and on the student’s worksheet
**View Notes**

Click on **View Notes** on the Notes Tab

**Modify Note**

Click on **Modify Notes** on the Notes Tab

**Student and advisor discussed student's career plans.**

Make changes to note

Click button to save changes
GPA Calculator

There are three different GPA calculators available in DegreeWorks: Graduation, Term, and Advice Calculators. The calculators, in conjunction with current DegreeWorks functions, can help students in many ways, providing:

- Realistic goal-setting at the beginning of the term or academic career
- Precise calculation of their end-of-term GPA using students' actual academic information
- Accurate mapping of students' paths for achieving honors, avoiding probation, or satisfying personal academic aspirations
Graduation Calculator

This calculator takes the most "unknown" inputs. Many students may not know how many credits are required for their degree, nor the number of credits remaining. In some cases, this calculator will be useful to inform the student that their desired GPA is not possible to achieve (considering their number of credits remaining). In short, this calculator helps students to set long-term general goals.

Select **Graduation Calculator** from the GPA Calc tab

Enter the number of semester hours the student still needs to complete

Enter the number of credits required for graduation

Enter the GPA the student would like to earn upon graduation

Click calculate

The system will advise you whether or not the desired GPA is achievable and what is necessary in order to make that happen.
Term Calculator

This is the most specific calculator. It can be used for goal-setting as well as mapping paths to avoid probation, achieve honors, etc.

The student's current classes and credits (if applicable) are preloaded into the form. You can also add classes and credits to the class list. When done entering class information with expected credits and grades, click Calculate. The following screen will produce the new calculated GPA.

Select Term Calculator from the GPA Calc tab

Select Grade for each of the current courses listed

Click calculate
Advise Calculator

This calculator is perhaps the easiest to use. The student need only provide their desired GPA. It is used to figure out how a student can raise/lower their GPA using actual grades as advice. While it is fairly general, it is more specific than the graduation calculator.

Select Advise Calculator from the GPA Calc tab

Enter the GPA the student would like to earn upon graduation

Click calculate

The system will advise you whether or not the desired GPA is achievable and what is necessary in order to make that happen.