



Student Educational Planner

Step by Step Instructions for Advisors

The DegreeWorks 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.

Advisor Instructions

1. Go to <http://dw.appstate.edu>
2. Login with your Appalachian username and password.
3. Enter the student's banner id in the Banner Id box or click the Find icon.
4. Once you have selected a student, click on the Plans tab

The screenshot shows the top navigation bar with tabs: FAQ, Help, Print, Exception Management, Template Management, and Log Out. Below this is a search area with fields for Student ID (900402466), Name (Testapp, Testy Quinton), Degree (BSC_220), Major (Criminal Justice (BSC)), Level (U), Campus (MC), Last Audit (08/26/2016), and Last Refresh (Today at 1:17 am). Below the search area are buttons for Plans, Notes, Petitions, Exceptions, and GPA Calc. A blue arrow points to the 'Plans' button. Below the buttons is a 'Format' dropdown set to 'Student View' and buttons for View, Save as PDF, and Process New. There are also checkboxes for 'Include in-progress classes' and 'Include preregistered classes', and a 'Class History' link.

5. You will be prompted to create a blank plan or select a template. Click on select a template.

The 'Create Plan' dialog box asks: 'Would you like to create a plan based on a template or would you like to start from scratch?'. There are two buttons: 'Blank Plan' and 'Select Template'. A blue arrow points to the 'Select Template' button.

6. Select the appropriate plan for the student and click open. You can also search for a degree type, major, etc in the search box instead of scrolling until you find the template you need.

The screenshot shows the 'Browse Templates' search results. The search box contains 'BSC'. Below the search box is a table with columns: Description, Level, Major, Degree, Catalog Year, Term Scheme, ID, Who, What, and Modific. Two rows are visible:

Description	Level	Major	Degree	Catalog Year	Term Scheme	ID	Who	What	Modific
BSCJ_Crim Justice, Intern Studies_BSCJ_2	U	220*	220B	2016	COMPLETE_SCHED	T0000322	Greer, Chi	NOT SET	8/23/16
BSCJ_Criminal Justice_BSCJ_220A	U	220A	220A	2016	COMPLETE_SCHED	T0000324	Greer, Chi	NOT SET	8/23/16

A blue arrow points to the 'Open' button next to the first row.

7. Select a Start Term (based on the student's catalog) and click OK.

Select a starting Term

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

Start Term* Fall 2016

Cancel OK

8. This brings you into the Edit View. Check the Active box and Save.

Student Planner for: Testapp, Testy Quinton View: Edit View Plan List New Plan

Description: BSCJ_Criminal Justice_BSCJ_220A Active

Degree: Criminal Justice (BSC) Level: Undergraduate

Tracking Status: Not displayed, plan is not active

Fall 2016 Total Credits: 9.0 Reassign Delete this term

Course Requirement	Credits	Minimum Grade	Notes
R_C 1000	3.0	None	
UCO 1200	3.0	None	
C_J 1100	3.0	None	

Placeholder Requirement Value Notes

Gen Ed Quantitative Literacy Course	4.0 Credits	
Gen Ed Integrative Learning Experience Course	3.0 Credits	

Still Needed Courses Collapse All

Course #	Title
Accounting (ACC)	
Anthropology (ANT)	
Appalachian Studies (A_S)	
Apparel Design & Merchandising (AD)	
Applied Music (AMU)	
Arabic (ARB)	
Art (ART)	
Astronomy (AST)	
Athletic Training (A_T)	
Biology (BIO)	
Business (BUS)	
Business Education (B_E)	
Career and Technical Education (CTE)	
Chemistry (CHE)	
Chinese (CHN)	
Commercial Photography (PHO)	

Create Block Audit What-If Del Save

Once the plan is applied to the student and active, you can manipulate the courses appropriately for the student. For example: The student is going to take UCO 1200 in the Spring 2017 instead of Fall 2016.

9. To move courses from one term to the next, you click on the course and once it's highlighted in blue, drag and drop in the appropriate term. You are also able to type in the subject and course number.

Fall 2016 Total Credits: 9.0 Reassign Delete this term

Course Requirement	Credits	Minimum Grade	Notes
R_C 1000	3.0	None	
UCO 1200	3.0	None	
C_J 1100	3.0	None	

Spring 2017 Total Credits: 12.0 Reassign Delete this term

Course Requirement	Credits	Minimum Grade	Notes
STT 1810	3.0	None	
PSY 1200	3.0	None	

10. To remove a course or placeholder, highlight the course and use the minus sign in the appropriate term. To add a course, you use the plus sign in the term. You can also use the subjects on the right hand side to drill down and drag and drop the course into the term.

The screenshot shows a course planning interface. On the left, there are sections for 'Fall 2016' and 'Spring 2017'. The 'Fall 2016' section shows 'Total Credits: 6.0' and a table of course requirements. The table has columns for 'Course Requirement', 'Credits', 'Minimum Grade', and 'Notes'. The first row is 'R_C 1000' with 3.0 credits and a minimum grade of 'None'. The second row is 'C_J 1100' with 3.0 credits and a minimum grade of 'None'. Below this is a 'Placeholder Requirement' section with two rows: 'Gen Ed Quantitative Literacy Course' (4.0 Credits) and 'Gen Ed Integrative Learning Experience Cou' (3.0 Credits). The 'Spring 2017' section shows 'Total Credits: 15.0' and a table of course requirements. On the right, there is a list of courses with columns for 'Course #', 'Title', and 'Status'. The list includes 'Communication Disorders (C_D)', 'Communication Sci & Disorders (CSD)', 'Computer Information Systems (CIS)', 'Computer Science (C_S)', 'Criminal Justice (C_J)', 'C_J 1100 INTRO CRIMINAL JU', 'C_J 1999 EXPERIENTIAL LEA', 'C_J 2120 POLICE PRO', 'C_J 2150 THE JUDICIAL PRO', 'C_J 2430 CORRECTIONS', 'C_J 2500 INDEPENDENT STL', 'C_J 2999 EXPERIENTIAL LEA', 'C_J 3001 WRITING IN CRIMIN', 'C_J 3050 AMERICAN LEGAL !', 'C_J 3110 CRIME AND CULTU', 'C_J 3115 RESEARCH METHC', and 'C_J 3121 INTERNATIONAL TE'. A blue arrow points to the minus sign in the 'Fall 2016' term, and another blue arrow points to the 'C_J 1100' course in the list.

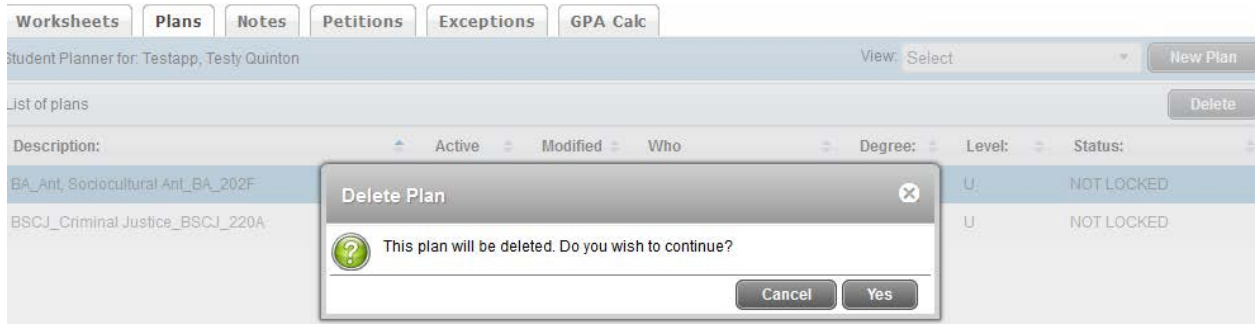
11. Some advisor types are able to delete plans. To delete a plan altogether from a student, click on View Plan List.

The screenshot shows a student planner interface. At the top, there are tabs for 'Worksheets', 'Plans', 'Notes', 'Petitions', 'Exceptions', and 'GPA Calc'. Below the tabs, it says 'Student Planner for: Testapp, Testy Quinton'. There is a 'View: Calendar' dropdown menu and a 'View Plan List' button. A blue arrow points to the 'View Plan List' button. Below this, there is a plan card for 'BSCJ_Criminal Justice_BSCJ_220A'. The card shows 'Active: Yes', 'Degree: Criminal Justice (BSC)', 'Level: Undergraduate', and 'Status: NOT LOCKED'. There is also a 'Tracking Status:' field.

12. Highlight the plan you want to delete and click on delete.

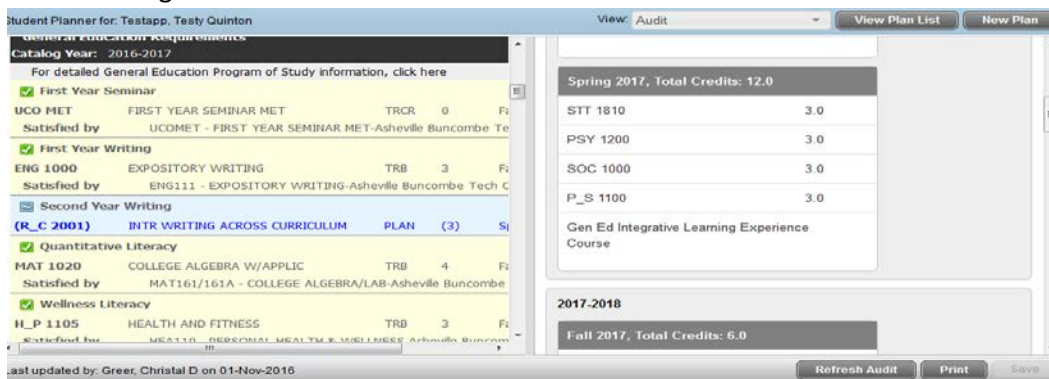
The screenshot shows a student planner interface. At the top, there are tabs for 'Worksheets', 'Plans', 'Notes', 'Petitions', 'Exceptions', and 'GPA Calc'. Below the tabs, it says 'Student Planner for: Testapp, Testy Quinton'. There is a 'View: Select' dropdown menu and a 'New Plan' button. Below this, there is a 'List of plans' section. A blue arrow points to the 'Delete' button. Below the 'Delete' button, there is a table of plans with columns for 'Description:', 'Active', 'Modified', 'Who', 'Degree:', 'Level:', and 'Status:'. The table has two rows: 'BA_Ant, Sociocultural Ant_BA_202F' (Active: N, Modified: 11/01/2016, Who: Greer, Christal D, Degree: BSC_220A, Level: U, Status: NOT LOCKED) and 'BSCJ_Criminal Justice_BSCJ_220A' (Active: Y, Modified: 11/01/2016, Who: Greer, Christal D, Degree: BSC_220A, Level: U, Status: NOT LOCKED).

13. You will get a pop up window asking if you wish to delete the plan, click yes.

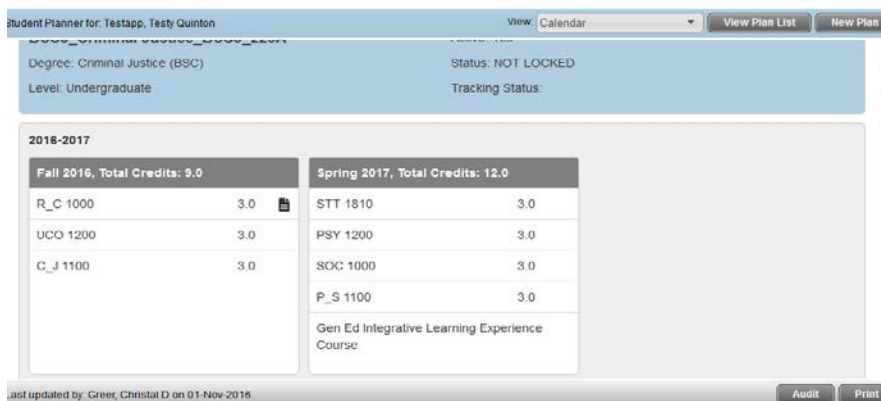


There are several other SEP views in additions to the Edit View.

Audit View Shows the degreeworks audit on the left with planned courses in the appropriate terms. The right side shows a calendar view.



Calendar View Shows a calendar view.



Notes View Shows any notes associated on the templates.

BSCJ_Criminal Justice_BSCJ_220A Active: Yes
Degree: Criminal Justice (BSC) Status: NOT LOCKED
Level: Undergraduate Tracking Status:

Hide all notes

Fall 2016, Total Credits: 9.0

Course Requirement	Minimum Grade	Credits	Notes
R_C 1000		3.0	<p>May take in fall or spring semester first year.</p> <p>Greer, Christal D 2016-11-01 10:16:32</p>
UCO 1200		3.0	

Last updated by: Greer, Christal D on 01-Nov-2016

Audit Print

Important things to remember when using the SEP:

- Placeholders should be replaced by actual courses. For example: Gen Ed Liberal Studies Experience is listed as a placeholder. Since there is no way to tell which course a student is going to take to fulfill that requirement, a student or advisor should add the appropriate course in for that term. You would then delete the Gen Ed Liberal Studies Exp placeholder. Complete the process by clicking Save. You will see placeholders for Gen Edu, Minors, SACs, Major Electives, etc.
- Non-course Requirements are used for test requirements such as Praxis or Computer Skills test.
- Choice Requirement should be replaced by actual courses. For example: Choice of ENG 2010 or ENG 2020. The student or advisor would add the course the student is planning to take in the course requirement section. You would then delete the choice requirement of ENG 2010 or ENG 2020. Complete the process by clicking Save.