How to Create a Student Planner

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WHAT IS A PLANNER

• A planner can be used to create a long-term plan for a student’s degree completion.
• A planner can be used to verify that the courses included on the student plan will fulfill the student’s degree requirements.
• It can help student’s stay on track to graduate within their desired time range.
• It will help students plan for registration in upcoming semesters.
• It will help to avoid last minute issues when students are applying for graduation.
• It will help the student to better understand his/her remaining degree requirements.
• It will help the student to prepare for advising appointments.
• It will help ECU track what courses our students need to take, and when they plan to take them.
• Department chairs and other administrators will be able to use this information for course planning and scheduling.
• Pre-defined Planner Templates can be created by departments and used when advising students.
• Planners can only be created and edited by the advisor.
• They are intended to be used during advising sessions.
• Students can only view these planned schedules.
• Students can have multiple plans, however only one plan at a time can be marked as active. Please designate the plan that most closely matches the students intended degree completion plan as active.

GETTING STARTED

1. Log in to DegreeWorks through your OneStop Account from the ECU main webpage.
2. **Click** the **Find** button or **enter the Banner ID** of an advisee to begin using DegreeWorks.

Navigating the Planner

1. **Click** on the Planner Tab at the top of the screen.

   The Planner is divided into two parts. The student’s current worksheet appears on the left side of the screen. The Planner appears on the right. You can increase or decrease each side by dragging the gray bar.

   2. If you do not have an existing plan, this drop-down menu will automatically set to **Add new plan**.
3. If you have one or more saved plans, your plans will be listed here along with an **Add new plan** option. The Active plan is the one that will default to when you click on the Planner tab.

![Planner interface with save options](image)

4. The drop-down menu to the right of the plans drop down menu controls the way you view the planner. Planner can be viewed in Notes Mode, Calendar Mode or Planned vs. Taken.

- In Notes mode, the planner will include a place to add notes for each semester.

![Notes mode example](image)

- In Calendar mode, you will not be able to add notes for each semester, but you can view more semesters at one time.

![Calendar mode example](image)
• In Planned vs. Taken, advisor and students can see planned versus actual. This mode can only be viewed in **View Mode**.

![View Mode Only](image)

**CHANGING THE PLANNER VIEW**

1. Select the view from the pull down menu.

   ![Planner Menu](image)

2. Select whether you wish to view or edit the Planner by clicking the Radio button next to the load button.

   ![Load Button](image)

3. Click the **Load** button to load that planner view.

   ![Load Button](image)

**PLANNER MODES: EDIT VS. VIEW**

- **Edit** allows users to modify the plan.
- **View** gives users a report that is good for printing.

**ADD A NEW PLAN**

1. Select **Add new plan** from the pull down menu. By default this is selected if there are no active plans. If you already have an active plan, this will be the default plan.

   ![Add New Plan](image)
2. Select your preferred viewing mode.

3. Make sure the Edit Radio button is selected and click the Load button.

4. Enter a Description for the plan.

5. Use this drop down box to enter the catalog the student is using. The current catalog is the default catalog listed.

6. By default, any new plan is marked as the Active Plan.

   Note: If you already have an active you will need to uncheck the Active Plan box. To set this plan as the active plan you will need to load the current active plan and make it inactive. See directions for inactivating a plan.

7. If your Department has a pre-defined plan click on Load in a pre-defined plan.
8. Select a term from the Term pull down menu.

9. Scan the worksheet on the left using the scroll bar for courses that are marked Needed.

10. These courses are hyperlinked to a box that will display course information, any prerequisites, and real-time data on offerings in the current schedule of classes.

11. Drag and Drop courses that are still needed from the left side of the screen to the appropriate planned term on the right side.

12. Notes regarding the new plan may be added to the Notes text box on the plan. This may include student specific instructions. This is viewable to students.
13. **CHECK THE ACADEMIC PLAN** – are all courses listed? – are any wrong courses entered on the plan? Be sure the plan is a good plan.

14. Once you have completed entering all the courses and checking the plan, click the **Save Plan** button to save the proposed plan in DegreeWorks for that student.

15. If your plan was saved successfully, a **pop up box will appear with a message**. If there were any errors, a pop-up box will appear with instructions for correcting those errors.

16. At bottom of page click on **Check All Terms**. You can also select only a few terms to be placed into planner worksheet by checking the box next to the semester you wish to see.

17. Click **Process New** to view the new plan of study for the student. All courses in checked terms will be placed on to the planner worksheet for your review.
18. The new Planner is **displayed on the left side** of the screen. Course in the plan are placed under the requirement they fulfill and are marked in **blue PL Planned Term**.

![Planner example](image)

19. **CAREFULLY review the audit** – are all areas met? Are there unnecessary or unwanted Free Electives or courses not used? If you find mistakes correct the academic plan then SAVE the corrected plan.

**LOAD PLAN**

1. Click on the **Planner tab**.

2. **Select Plan** from the Planner pull-down menu.

3. Select the **Viewing mode**.

4. **Select whether you will edit or view** the plan. By default the **Edit** radio button is selected. Click the **View** radio button to view a plan in a report format which is good for printing for students.
5. Click **Load**.

6. The Plan is loaded into a worksheet on the left side of the screen.

**LOAD PREDEFINED PLAN**

**Currently no pre-define plans have been developed. Departments need to contact Amy Bissette in the registrar’s office if they are interested in using this feature.**

1. **Click** the Planner Tab.

2. **Select Add new plan.** **By default the active plan is loaded in the planner window. If not plan has been created a new plan/unsaved planner is loaded in the planner window.**

3. **Select** your preferred viewing mode.

4. **Click** the **Load** button.

5. **Enter** a **description** for the plan.
6. Select the catalog year used by the student.

7. **Click** the link **Load in a pre-defined plan**.

8. **Enter** the Degree Criteria in the Pre-defined Plan Search window.

9. Click the **Search** button.

10. **Select** the appropriate plan from the list.

11. Click **Load in my plan**.
SHARING A PLAN WITH A STUDENT

1. Click on the Planner tab.

2. Select the Plan from the pull down menu. **By default the Active plan is loaded in the Planner window.**

3. Select Calendar Mode (best for viewing multiple terms).

4.

5. Click the View radio button.

6. Click Load.

7. The planner is displayed in an easy to read format.
8. **Click Print** to print or save file as a PDF.

   ![Student Educational Planner screenshot]

9. Print or email the plan to the student.

   ![Student Educational Planner screenshot]

**MAKE PLAN ACTIVE/INACTIVE**

By default the active plan is loaded into the planner window.

**To make the Active plan inactive**

1. **Select the plan** from the pull down menu.

   ![Plan selection screenshot]

2. **Uncheck the Active Plan** Check box.

   ![Plan selection screenshot]

3. **Click the Save** button.
To make a plan active

4. Select the plan from the pull down menu or create a new plan by selecting Add new plan.

5. Check the Active plan box

6. Click the Save button.