# Degree Works Plans User Guide

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The Plans tab is available to students and advisors on the student’s Degree Works page.

The Plans tab can be accessed by student or advisors from the Worksheet page of Degree Works.

Plans can be created or changed by students or advisors, and can be used with or without being Locked. If a Plan is Locked and Active, DW can track a student’s progress and show if they are on track.

Please see the instructions in the rest of the guide to learn more about making and changing Plans.
If the Plan is Active, it will be available to be tracked through Plans for progress, as well as by the Registrar’s Office for course planning purposes. Only one Plan may be Active at a time.

If the Plan is Not Locked, the student’s progress will not be tracked in the system.

On the Plans tab is where you will see any existing Plans on a student’s record.

If a Plan is marked “Active” it can be used for tracking, both for the department, and for the student. DW can track how many students are planning to take a course in a particular semester. Each student may have only one Active Plan at a time, but they can have other Inactive Plans to look at alternative options or to help plan for a second major program.

In order for DW to track a student’s progress, their plan must be Locked, this indicates that the Plan has been finalized and that the student should proceed with courses exactly as listed.
Select a View option to open the Template. The various view options will be discussed throughout this guide.

Unnecessary Plans can be deleted on this screen. Take caution, even Locked and Active Plans can be deleted.

Before a Plan can be opened, you will need to choose which View you would like to use. The rest of this guide will walk you through each View how they can be used.

Students may have multiple Plans, but those that are not being used or considered can be deleted. If a student has multiple majors, their primary major plan should be marked as Active.
To add a Plan, click New Plan.

Click Select Template to choose a major-based template.

To create a new Plan, click on the New Plan button. This will allow you to select a template or make a blank Plan. Most programs should have templates for every catalog year starting with 2014-2015, which have been approved by the departments for accuracy.

If you discover a major that does not have a template, please contact the College advising office for more information.

If you are a department advisor and need to make changes or updates to an existing template or create a template for a new program, please use the Template guide for further direction.

If you would like to start with a Blank Plan, see page 23 for more information.
Each major may have options for multiple catalog years. Be sure to choose the template with the catalog year that is appropriate for the student.

The template list will show each available major/program template, first listed alphabetically, then by catalog year. It is important to choose the correct catalog year for the student, as requirements for the program may change from year to year.

If you are unsure how to determine a student’s catalog year, please contact the College advising office or the Registrar’s Office for more information.
In addition to Catalog Year, you can also choose a starting Term for the Plan. Typically this will be the same as their Catalog Year.

Once you have chosen a Plan, you can choose the starting Term, typically the year the student began at WMU or their catalog year.

If a student is starting in the Spring or Summer, choose the Fall of the same academic year. For example, if a student is starting in Spring 2017, the Start Term would be Fall 2016, but the courses would be left blank for the Fall 2016 semester.
The Edit View is where you can choose if the Plan is Locked or Active. Save to confirm these settings.

You will need to Save the Plan before changing Views.

This is Edit View. Edit view allows you to make changes to the plan, choose courses for each semester, or insert placeholders for courses yet to be determined. Edit View is also where a Plan can be marked as Active or Locked.

If a Plan is Active, it will be able to be tracked by the Registrar’s Office. If it is Locked, it can be tracked for progress. A Plan should be Locked only once it’s in its final version.

If a student has multiple majors, it will typically be best to use the template for the primary major, and the courses for the secondary major (or minors) should be added into that plan.
To Add a Requirement, click the + option for the semester/term you need it to apply. You can choose to a specific Course, a Choice between multiple courses, a GPA requirement, a Non-Course Requirement, a Placeholder, or a Test Score.

Plans will only allow you to Save once a change has been made.
Clicking “Expand All Terms” will show every term and any content currently listed. Click again to “Collapse All Terms” and only the list of terms/semesters will be shown.

There is a button at the top right that can be used to Expand or Collapse All Terms. This will allow you to view each term and all the content contained in it, or collapse each term and open only the ones you currently wish to view.
When you add a new Course, a blank space will be added.

If you add a course/option that you don’t need, you can click on it and hit “-” to remove it.

You can choose to make any course or requirement “Critical” by checking this box.

You can also enter a Minimum Grade requirement for each class in this column.

Courses, semesters, and requirements can be added, changed, or removed in Edit View.

Courses can be marked as “Critical” by checking the box on the left, meaning that the course is designated as something that the student MUST complete during that semester. Critical courses may be those that are required in a course sequence, or those that are only offered during a certain semester.

Plans does not recognize pre-requisite requirements, so Critical courses must be added in the proper order with all pre-requisites accounted for as necessary.
When adding a new Course, you can type in the subject and number (ENGL 1050) and it will automatically fill in the number of credits. The system will only accept courses recognized as part of the catalog.

You can also use the search icon to look for course options, or you can drag and drop from the Courses pane on the right.

There are also several DW Placeholder options, like DWELECT that can be filled in to represent elective courses. Each general education requirement has a placeholder as well.

You can add specific courses by typing in the subject and number (ENGL 1050, MATH 1100), you can search for a course using the magnifying glass icon, or you can drag and drop courses by subject from the list on the right.

DW Plans has placeholders for each general education requirement, since students have many options to choose from, as well as placeholders for electives. DW ELECT may be a major, minor, or general elective, and the advisor can specify which in a Note. DW MAJOR and DW MINOR are also options to show elective credit for a particular purpose.

They system does not track placeholder courses, so until the placeholders are replaced with specific courses, they will not be tracked or show as Planned to be completed.

Degree Works does not recognize pre-requisites and will not show an error if a pre-requisite is not planned correctly. Please be aware of the order of required courses and placement to help students stay on track.
The Still Needed pane has a drop-down menu for every block listed in Degree Works. In the pane, each block will show options for any requirements that have not been met or included in the Plan.

See the next page for more information about the Still Needed pane.
For example, if a student still needs Proficiency 3: College-Level Math, it will show under the General Education Proficiencies section of Still Needed and list the options to fill this requirement. Courses from the Still Needed pane can be dragged and dropped into the Plan.

Still Needed does not take into consideration any of the DW Placeholder courses, such as those used to hold the place of a general education requirement or elective. So even if a student has “DW PROF3” included in their Plan, it will show as Still Needed because the system does not read that as a valid course used to fill the requirement.

If a placeholder is replaced with a course, you will need to delete the placeholder from the plan in Edit View.
When adding a Choice, you can include a list of specific options for the student to choose from. Click the … icon to show the menu for adding choices. You can enter as many options as necessary by clicking “Add another option” and entering the course information.

Instead of a specific course, it is possible to add a Choice. Choices show a list of courses that a student can choose from.

Advisors can choose if they would like to use Choice to list elective options, or to use DW ELECT and add a Note indicating what kind of elective the student needs to choose, or use DW MAJOR or DW MINOR as a placeholder.

Choice also allows advisors to show students that they need an elective course from the department, and can specify what level the course is required to be, by entering the department and the number span.

For example, if a student could choose a Sociology elective at any level, the advisor could enter SOC 1000:5999 as a Choice. If a student needed an upper-level Spanish elective, the advisor could enter SPAN 3000:5999 as a Choice.
You can add a GPA requirement by major, overall, or for a semester.

Advisors may add a GPA requirement for each semester. This can be specified to require a certain GPA for a student’s major, the current semester (Class List), or overall GPA.

This requirement could be added in addition to the University requirement that a student maintain at least a 2.0 GPA to remain in Good Standing and to graduate and could be a part of a program requirement, or a graduate or professional school application requirement.
You can include a Placeholder instead of a Course or Option, Placeholder options include Comments and Non-courses (the two most likely to be included).

Placeholders can take the place of a Course or Choice.

Non-Course Placeholders may be used to explain extracurricular requirements to students, such as an entrance exam or other requirement that would not be met by a class.

Comments can be entered to give students further information or suggestions.
To add a Note to a semester or to a specific requirement, click on the Notepad icon.

If there is already a note for a semester or requirement, the Notepad icon will show three lines on it to indicate text. You can hover over the Notepad to get a preview, or click on it to open the Notepad dialog.

Notes can be added to several parts of the Plan.

#1 is a Note about the entire Plan

#2 is a Note about the specific semester/term

#3 is a Note about a particular course or requirement

If the Note icon is solid black, no text has been added. If a Note icon shows three white lines, then text has been added that can be viewed by the student or advisor. Hovering your mouse over a Note will give a preview of the text, clicking it will show the full text.
From the Notepad dialog box, you can view existing Notes or add a new Note. You have the ability to make the Note Internal, or only viewable to advisors, not the student.

The Note dialog box gives the option to add, change, or delete Notes, as well as the ability to make a Note available to or hidden from the student (Internal). Students have the right to request any documentation within their records, so even an Internal Note may be accessed by a student at their request.
While in the Edit view, you can click on the “information” icon to bring up a text box with the catalog information and current offerings of any course in the Plan, similar to clicking on any course on the Degree Works worksheet. If you click in the “information” icon for the semester, it will bring up a text box with the catalog information and offerings for all classes listed in the term.

The blue “information” icon will bring up a box showing the catalog description and registration information for a specific course (if you click the icon next to the class) or for every class listed in a term (if you click the icon next to the semester listing).
Plans will populate a text box if the same course is used more than once. For Elective credits or courses that are repeatable for credit, click “OK” and it will allow the duplicate.

DW ELECT can be used for major, minor, or general elective credit. A Note can be added to specify, if necessary.

DW ELECT will auto-populate 4 credits, but the number can be changed to whatever is most relevant or likely.

DW MAJOR or DW MINOR may be a better choice for program-specific electives than DW ELECT.

If you enter a course more than once, Plans will tell you that the course is being repeated and ask you to confirm. You can approve the duplication of courses as necessary, especially DW ELECT, DW MAJOR, or DW MINOR, special topics courses, or those repeatable for credit.
In certain circumstances, you may want to start from a blank Plan and not a Template. This may be most useful for transfer students who only have a few semesters remaining, or Exploratory students who are unsure of their major. After clicking “New Plan” choose “Blank Plan” to start an empty Plan from scratch.
The new Plan won’t Save without a name, so you can give the Plan a descriptive title, and choose if you’d like to be Active or Locked. Remember, only one Plan can be marked Active for tracking.

To add a new term to the Plan, click on the “+” button at the top of the screen and choose which term you would like the Plan to start.
Once you’ve added a term, you can add Courses, Choices, or any other option to the plan by using the “+” button at the top right of the semester/term heading.

It may be easiest to simply add the remaining terms until the student’s planned graduation and then move to Audit View and drag and drop courses from the Worksheet/Audit into the remaining semesters.
“Reassign” allows you to change the entire term, for example, if a student decided to start in the Fall 2016 semester instead of Spring 2016, you could choose “Reassign” and change the term without having to change the whole Plan. The Reassign option will only allow you to change the term to a semester that isn’t already in the Plan, but if you have multiple terms and Reassign them, they will move into chronological order in the Plan.

You can also use this feature to delete entire terms, if necessary.
A Blank Plan can have as few or as many terms as are needed. Students who are exploring majors may wish to have an individualized blank Plan for their first few semesters as well as an Inactive Template Plan to show them how a particular major would progress. The What If tool Degree Works can also be useful in helping students to see what would be required for a particular program.

Don’t forget to save often!
Calendar view shows a snapshot of each semester and what the student should plan to take.

The Notepad icon shows on any term where an advisor has entered a Note.

Clicking on the Semester (Fall 2015) will bring up the catalog information and registration availability for each specific course listed that semester.

You can go the Audit screen, or Print the Calendar view.

Calendar View removes some of the detail and simply shows which courses are planned for each term. The Notepad icon will show anywhere that a Note has been entered for that semester. You can click on the semester title to show catalog and registration information for each courses listed during that term.
The Audit button in Calendar will bring up a copy of the student’s DW worksheet. You can scroll through and pull up course information, but the Audit cannot be moved out of the window the Calendar is in.

Use Audit view to see both the Calendar and the Worksheet/Audit at the same time.

From the Calendar View, you can click on the Audit button at the bottom right of the page to view the student’s audit (their DW worksheet). This will allow you to see how the courses in the Plan apply to their audit and if anything has been left out. Any requirements not included in the Plan will show as Still Needed on the Audit.

To view the Calendar and Audit views side-by-side, use the Audit View of Plans.
Audit View shows both the student’s audit (DW Worksheet) and the calendar view of their plan side-by-side. This allows you to see how all of the courses fit into their worksheet, as well as what order they are scheduled to take them in the Plan, and if anything has been left out and is Still Needed.
You can click on a course in either the Audit or Calendar pane to see the catalog and registration information.

For more information about a course, you can click on the course in either the Audit/Worksheet or in the Calendar to see the pop-up window of catalog and registration information.

This may be a good way to compare Placeholder courses to the available options, allowing students to make a more detailed plan by replacing the Placeholders with specific courses, which will also allow them to Track their progress.
You can drag and drop courses from the Audit to the semester in the Calendar you would suggest that a student take each course. To remove courses or make bigger changes or add Notes, use the Edit View. Save and Refresh Audit to see the changes made reflected in the Audit.

You can drag and drop courses from the Audit/Worksheet and into the Calendar while in Audit View of Plans. You cannot remove courses from the Calendar in this view, that will need to be done in Edit.

You can Save and Refresh to update any changes made to the Calendar and see how those changes impact the Audit/Worksheet.
The Calendar will show courses as “On Track” if the student finishes them in the assigned semester. You may need to adjust the Plan to match variations in the student’s schedule. It will say “Warning” if the student did not take a course during the planned semester. Plans must be Active and Locked to track.

Courses will show in the Audit as Still Needed if they are not on a student’s schedule or included in their Plan.

If a student’s plan is Locked and Active, Audit View is where it can be Tracked. A course will show as “On Track” with a green ribbon if the course is being taken during the Planned semester. If a student has Planned to take a course, but they don’t register for it, a red Warning will show, letting them know that they are not “On Track” with that class.

If a student’s plan does not include a particular requirement, it will show as “Still Needed” in red on the Audit/Worksheet.
A semester will be labeled “Off Track” if a student did not register for a planned course. It will show in the Audit as “Still Needed.” The class will need to be added to the Plan in a later semester.

If a student’s schedule is “Off Track”, meaning they have deviated from the set Plan, their Plan will need to be updated to show the appropriate changes.