Degree Works Plans

The SEP (Student Education Planner) area of Degree Works is available on the “Plans” tab:

If no plan yet exists for a student, you will be prompted with options for creating one from “blank” or from an existing template:

Templates

Templates are pre-defined eight-semester plans based on degree and major requirements.

You can select a Template from a list of those currently available. The list can be sorted using the column headers (e.g. description, major). There is also a Search function. Select the appropriate Template and click “Open” (or simply double-click a Template).

If more than one Template is active for a particular major (reflecting a recent program update), be sure to select the appropriate Catalog Year – the one in effect for the student’s Catalog Term.
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To apply the Template to the student as a Plan, you will need to select a start term:

EDIT VIEW

Whether starting from a Blank Plan or a Template, new Plans will open in the Edit view:

The current Plan must be marked “Active” for the student to see. Old / outdated plans should not be marked Active.

Plans must also be Locked to measure on-track / off-track status, and also to be available to Registration tools in myOswego.

Only one plan per student should be Active and Locked.

Advisors can still edit a Locked Plan.
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There are several icons and buttons available for editing a plan:

- **Notes** – add a note or edit/delete notes you have created.

- **Notes** – when notes exist, the icon displays differently to indicate there is content.

- **Remove** – for removing terms from a plan (a “Delete this term button” is also available) or individual requirements in a term.

- **Add** – for adding terms to a plan or requirements in a term.

The Reassign button allows you to reassign all term requirements to a different term.

Individual requirements can be “dragged and dropped” from term to term if needed.
Several options are available when adding a term requirement.

- “Course” should be selected for an individual course requirement (e.g. ENG 102).
- “Choice” is available when the student has options (e.g. ACC 315 or @ with World Awareness attribute).
- “GPA” options include the Overall GPA and Major GPA (you need to specify the major).

Credits and Minimum Grade can be specified for requirements. There is no need to specify Minimum Grade for all requirements, just those where a minimum grade is specified in the Catalog.

The “Critical” checkbox should be checked for major requirements and prerequisite coursework which, if not passed in the term specified, would delay academic progress. Items marked as Critical are subject to Tracking.

To delete a requirement, click on it so it highlights and then click the Remove icon ( ).

Choices work best when they are well-specified. Clicking on a Choice requirement will bring up an edit dialog box:

This wildcard (“@ @”) could be changed to a specific course (e.g. CSC 102) when the advisor and student clarify student intention / need.
The right-hand panel of the Edit view provides options for “dragging and dropping” coursework to the plan. The “Courses” view provides a Catalog inventory listing, the “Still Needed” view provides course information from the student audit. These can be especially helpful when starting from a blank plan.

Hovering over courses listed will provide some information; clicking on a listed course displays Course Link information, just as on a student audit:
When editing is complete, Click “Save” in the lower-right hand corner of the screen. Saving can take time, as Degree Works is validating planned courses against prerequisite structure and “when offered” data.

A warning will pop up if there is a problem validating the proper pre/co-requisite sequence:

![Validation Errors](image)

After clicking “Cancel” or “OK”, scrolling through the plan will highlight the source of the warning:

![Plan with errors](image)

Advisors can click “OK” to move past the warning (the planner sometimes has difficulty finding the requisite courses if they are listed in a Choice requirement).
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**Tracking**

**Active, Locked** plans assess and display on-track / off-track status when they are saved. Tracking status will display on requirements marked as **Critical**, on the term, and on the overall plan.

- Current (based on date saved) and prior terms are tracked.
- Only items marked “Critical” track.
- One off-track item in a term makes the term off-track.
- One off-track term makes the plan off-track.
- If the student takes an off-track course in a later term, it will be recognized and show as on-track the next time the plan is saved.
  - Example: Plan indicates to take CSC 102 in Fall. Student does not. Shows as off-track.
    Student registers for CSC 102 in Spring. Advisor saves plan, CSC 102 is now on-track.
- Past terms cannot be updated – except that you can drag off-track items to another term.
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To make tracking work on an attribute-driven choice requirement, use the “@ @” wildcard for the course and number, along with selecting the attribute (and checking “Critical”):

<table>
<thead>
<tr>
<th>Tracking</th>
<th>Critical</th>
<th>Choice Requirement</th>
</tr>
</thead>
<tbody>
<tr>
<td>On-Track</td>
<td>✓</td>
<td>@ @ with VIAHU</td>
</tr>
</tbody>
</table>

In general, tracking does not work well on generic placeholders. Tracking is not like the degree audit. It simply assesses if the specified course exists in registration or academic history. For example:

Nine credits in a specific subject might be split up as three credits of “SUBJ 3@” in one term, three credits in another term and three credits in a third term.
If all three terms were tracked, a single course of “SUBJ 310” would make them all on-track.

If you want to track a particular requirement like this, update generic placeholders with some specificity (e.g. SUBJ 310 or SUBJ 320 in one term, SUBJ 340 or SUBJ 350 in another, etc.).

That said, “SUBJ 3@” can be informative enough for students to make an appropriate selection when the Plan displays in Registration. It’s just a question of if there’s a need to track the particular requirement. Many Templates have generic placeholders like this, though few are marked as critical. Update as deemed appropriate.

Tracking Batch Updates

The Registrar’s Office has the ability to run tracking for all active, locked plans in batch (as if each plan was individually re-saved), and will do so at certain key times in the year, such as at the end of add/drop and after end-of-term grade processing.

Batch tracking can also be done in an “Unofficial” mode, with the ability to track beyond the current term. This mode will update the icons and tracking status that shows on requirement-level indicators, but not the term and plan-level indicators.

This update may be done at useful points in the year, such as at the end of Advance Registration to show if the student registered for appropriate classes in the upcoming semester.

To make sure tracking is up-to-date when reviewing a plan, make a small change (like unLock / re-Lock) and Save.
CALENDAR VIEW

When a plan already exists, the Calendar view is the first view presented when clicking on the Plans tab.
- This view displays the plan by academic year.
- Holding your mouse pointer over notes icons and courses will display text.
- Clicking on a course will display Course Link information, just as on a student audit.
- No editing of the plan is available in this view.

NOTES VIEW

The notes view displays the plan with notes displayed (they can be hidden with the “Hide all notes” button).
- Holding your mouse pointer over notes icons and courses will display text.
- Clicking on a course will display Course Link information, just as on a student audit.
- No editing of the plan is available in this view.
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AUDIT VIEW

This view displays the student audit side-by-side with the Calendar view. This is especially helpful in verifying completeness of the plan.

- Holding your mouse pointer over notes icons and courses will display text.
- Clicking on a course will display Course Link information, just as on a student audit.
- “Light editing” of the plan is available in this view – Specific Course (not Choice) requirements can be “dragged and dropped” between terms.