

## DegreeWorks Planner for Students

**Planner Tab** Use this tab to lay out an education plan the next one or more quarters. You can make more than one plan, but only one can be the "Active Plan" against which DegreeWorks will be displaying/applying data.

- Click on the **Planner** tab

This screen is divided into two sections:

**Planner Worksheet:** is located on the left side of the screen

This section shows your courses, both complete and planned – the same as appears on the Audit tab. Use the scrollbar to view the entire audit. This divider can also be moved to the left or right to make the panel larger or smaller.

At the bottom of this section is the Show What If Options that lets you work with any What If Majors you created under the Audits tab. (see page 4 for instructions)

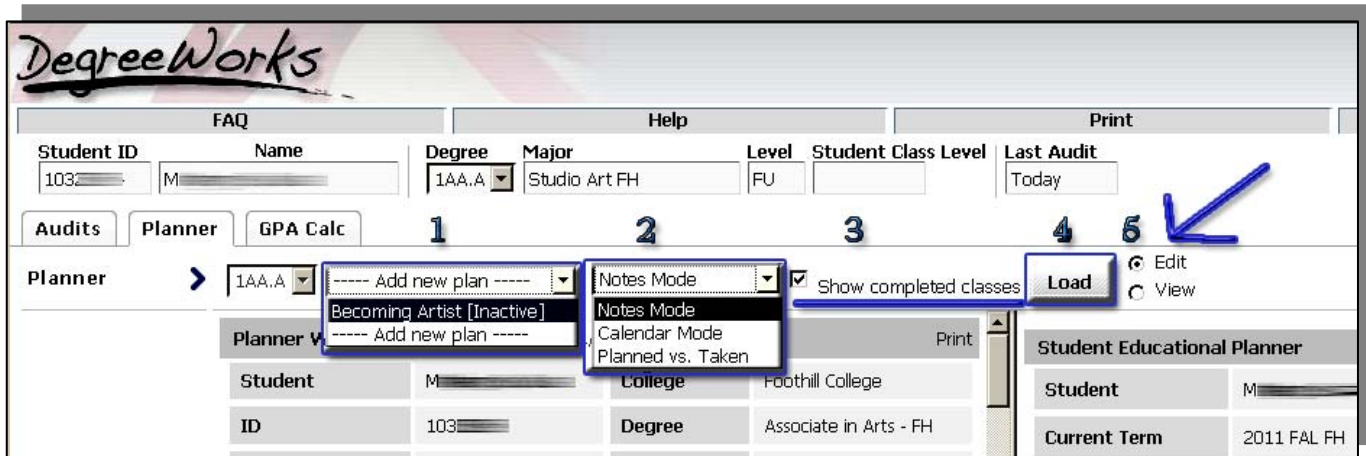
**Student Educational Planner:** is located on the right side of the screen

This is the area where you can work out your future courses.

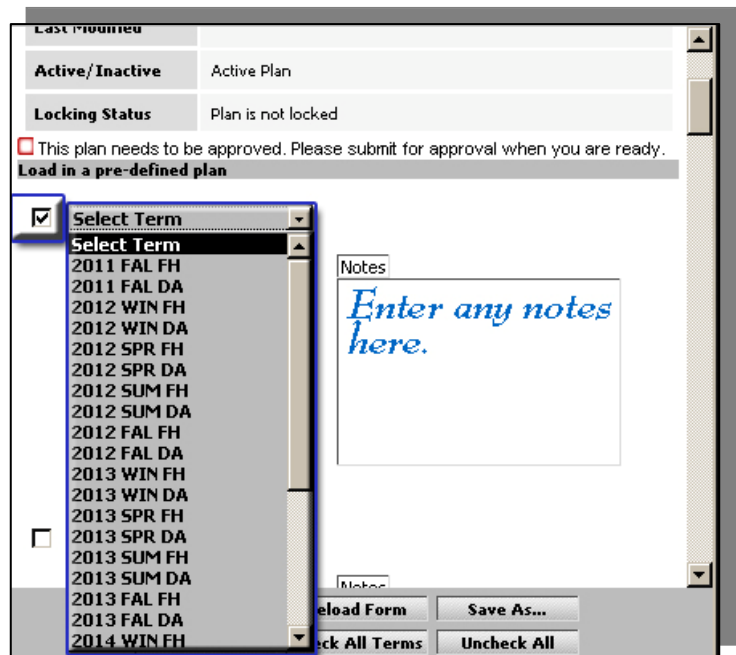
It is made up of three sections:

- Student Header where you can
  1. Name the plan
  2. Select the catalog year
- Course listing per term
- Controls at the bottom which are used to process and save a plan.

## To create a new plan

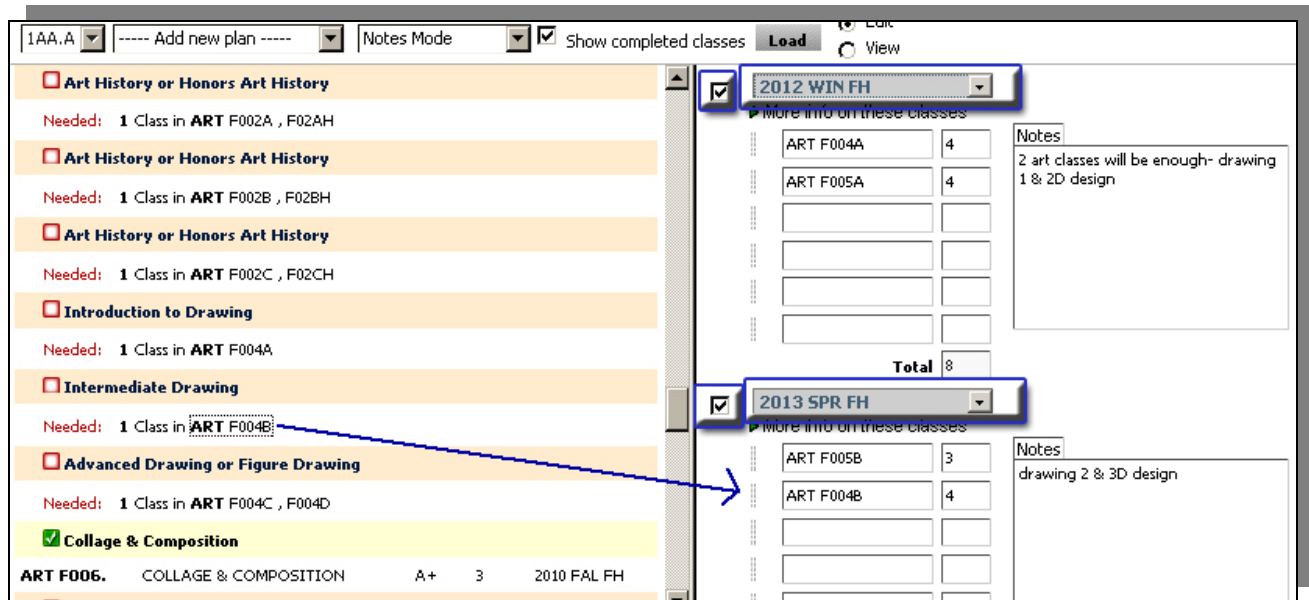


1. Make sure that "Add new plan" is in the drop down list. Any plans previously saved will also be listed in the drop-down list.
2. There are three different modes in which to work and save a plan.
  - o The "Note Mode" view gives you the ability to add notes to each term you are working on (this is what's showing in the screen shot above) and show each term, one below the other.
  - o The other option is the "Calendar Mode" which has lines with four terms across (representing an academic year), but which only provides one note box at the end of the whole planning area.
  - o "Planned vs. Taken" compares the courses on a saved plan to those already taken.
3. "Show completed classes" is checked by default and prevents you from saving completed classes into Planned terms.
4. The "Load" button is clicked to display a blank plan if a saved plan is displayed or to display a selected saved plan.
5. "Edit" allows users to modify the plan. "View" can only be used with a saved plan.
6. Complete the Plan header
  - o Enter the plan description (name)
  - o Select the catalog year
7. Select a Term:
  - o Check the box for every term that you wish to Process (see below)
  - o Select the term from drop-down menu.
  - o Enter any notes



### Add Courses to Plan:

- On the left side of the planner scroll down to display the courses you are planning to take. Note, as you move your mouse over the class number the title displays. Now you can simply drag the class over to the term when you want to take it. The course ID and units will be saved and total units for the term calculated. You can also type in a course following the same format.



### Saving Your Plan:

Once you entered all you classes, use the button at the bottom of the planner panel.



1. **Save Plan:** Saves the currently loaded plan. Be aware, there is a problem saving plans if you are using an older Safari browser. Using Safari 5 or a newer release will allow you to successfully save your plan.
2. **Reload Form:** Clears the currently loaded plan, removing any courses, terms, and notes.
3. **Save As:** Allows you to start with one plan, make changes, and then save the modified plan under a different name.
4. **Process New:** Will run the currently loaded plan against the student's Banner data and show what the plan will do with the additional data. It will only processes terms that have been checked.
5. **Check All Terms:** Will place a check mark in the boxes for all the terms included in the plan, even if they don't show any data.
6. **Uncheck All:** Un-checks all the boxes next to the terms.

To save an unofficial plan for yourself only, press [No].  
 To submit an official plan for approval, press [Yes] and make an appointment with a counselor.  
 To cancel your plan, press [Cancel]. This action will not save your plan or submit it for approval.

## Printing Your Plan

There is also a **Print** button at the top right of the **Student Education Planner** half of the screen. However, it will likely print out blank terms in addition to planned terms, so use this button with caution as it may result in wasted paper. Or select **Calendar Mode** and it will print two years on one page. To switch between the modes do the following.

- Click in the **"Mode"** drop down list window
- Select which mode you want
- Click the **Load** button

## Using the Planner with a What If Scenario

The screenshot shows the DegreeWorks Planner interface. At the top, there are tabs for 'Planner' and 'GPA Calc'. Below the tabs, there are several dropdown menus: '1AA.A', 'Becoming Artist [Inactive]', and 'Notes Mode'. There is a checkbox for 'Show completed classes' and a 'Load' button. On the right side, there are 'Edit' and 'View' buttons. The main area is divided into two panes. The left pane is titled 'Planner Worksheet' and shows 'AA553755 as of 01/04/2012 at 15:07'. It has a 'Print' button and a 'Hide What If Options' button. Below this is a 'What-If' section with dropdown menus for 'Level' (Foothill Undergraduate), 'Degree' (Associate in Arts - FH), and 'Catalog Year' (2011-2012). There is a 'Choose Your Different Areas of Study' section with a 'Major' dropdown menu set to 'Pick a Major'. Below that, it says 'Chosen Areas of study' and lists 'MAJOR : General Art-AA FH'. The right pane is titled 'Student Educational Planner' and shows details for 'Student: Malmgren, Susan L', 'Current Term: 2011 FAL FH', 'Description: Becoming Artist', 'Catalog Year: 2010-2011', 'Last Modified: 12/14/2011 by Malmgren, Susan L', 'Active/Inactive: Inactive Plan', and 'Locking Status: Plan is not locked'. There is a checkbox for 'This plan needs to be approved. Please submit for approval when are ready.' At the bottom of the right pane, there are buttons for 'Save Plan', 'Reload Form', 'Save As...', 'Process New', 'Check All Terms', and 'Uncheck All'. A blue arrow points from the 'Process New' button in the bottom right to the 'Use What If Scenario' checkbox in the 'What-If' section.

**What If** options can also be used while working with the **Planner Worksheet** and **Student Educational Planner**. If used, click **Show What If Options**, choose the desired options, hit **Process New** (bottom of screen), then **Hide What If Options** (not seen here) to see the Planner Worksheet updated with the What If Scenario in place.

To return to your original program, uncheck the **Use What If Scenario** box and hit **Process New** again.