Planner FAQ for Students

What is the Planner?

The Planner is a tool designed to help students and counselors create specific plans of study, which can then be run against a student's degree audit to check for accuracy. It allows you to arrange course requirements into future quarter blocks. You and your counselor will find this helpful as you forecast your academic career. It is recommended that you create an active plan and keep it up-to-date, as this information may be used by college administrators to determine the demand for various courses in future terms.

Where is the Planner located?

To access the Planner, click on the Planner tab, located next to the Audits tab.

How do I create a Plan?

- First, give your plan a name in the "Description" field. Since you can save more than one plan, be sure to give your plan a unique description.
- After "Description," it should automatically display your catalog year in the field next to "Academic Year." If the catalog year is not accurately displayed, change the term to the catalog year that houses the requirements you would like to see displayed in your audit on the left side of the screen. If you have questions about which catalog you are under, please see your counselor/advisor.
- Next, select the term that you will be planning for from the drop down menus above each term.
- Then click the boxes to the left of each term you've selected or click the "Check All Terms" button at the bottom of the right half of the screen.
- Next, you can customize your plan by adding courses to the terms you've selected by dragging and dropping them from your audit on the left side of the screen or by typing directly into the term boxes.
- Once your plan is customized and made active, click Save Plan.

[Return to top](#)

How do I view planned courses in my audit?

- Once you've created, and saved your plan, you can view the planned courses against your degree requirements by clicking the "Process New" button located at the bottom of your plan. This will apply your planned courses to the degree audit displayed on the left. Planned courses are listed in blue.
- Be sure you've check marked each term you want to see run against your audit. You can do this by clicking the check boxes next to each term or by clicking the "Check All Terms" button at the bottom of your plan.
- Planned courses can only be viewed under the Planner Tab, not under the regular Audit view.

Will putting courses in my planner change the way my audit looks?

No. Nothing entered on the Planner will affect your actual audit. You can, however, see how the courses you have entered in your planner will apply in your audit by checking the boxes next to the quarter blocks that you wish to include (check all of the boxes to see how your audit will look if you complete your entire plan) and then clicking on "Process New" button. In the audit on the left-hand side of the screen, you will see how the planned courses applied to the various major requirements.

How do I view my planned courses against a "What If" Scenario?

- To view your planned courses against a "What If" scenario, first click on the Planner tab.
- Then use the "What-If" area at the bottom of your audit, on the left side of the screen, to select your What If criteria. Be sure to select a degree and catalog year, you would like to see your plan run against.
- Then, click the box next to "Use What If Scenario"
- Finally, click the "Process New" button at the bottom of the right half of the screen. This will apply your planned courses to a What If scenario.

How do I create and save additional plans?

- To create and save additional plans, first use the drop down menu located at the upper left hand side of the screen to select "Add new plan."
- Next, select the terms that you will be planning for from the drop down menus above each term.
- Then click the boxes to the left of each term you've selected or click the "Check All Terms" button at the bottom of the right half of the screen.
- Next, you can customize your plan by adding courses to the terms you've selected by dragging and dropping them from your audit on the left side of the screen or by typing directly into the term boxes.
- Once your plan is customized, click Save Plan.
- The Save Plan pop-up window allows you to save your plan for personal use or to make it available for approval when you meet with a counselor. This is considered your Active Plan. However there is no limit on the number of "inactive" plans you can save.

How do I get my Plan approved?

Save the plan and answer **"Yes"** in the Save Plan pop-up window. You will also need to make an appointment with a counselor to discuss the plan, before it can be approved.

What is Notes Mode?

Notes Mode is one way of viewing your plan. In Notes Mode, the planner runs vertically on the right hand side of the screen, one term following the next; and each term has its own space for notes.

Return to top

What is Calendar Mode?

Calendar Mode is one way of viewing your plan. In Calendar Mode, the planner runs horizontally on the right hand side of the screen, with one large space for notes at the bottom.

What is Planned vs Taken Mode?

Planned vs Taken Mode is one way of viewing your plan. In Planned vs Taken Mode, each term is displayed with two columns, one for planned courses and one for taken courses. This view provides a concise, at-a- glance view, of course work that a student will need to complete in order to follow their plan.

How do I switch between views?

To switch between the Notes, Calendar and Planned vs Taken views, use the drop down menu at the top of the Planner screen to select the view you would like to have applied to your plan. Once you've selected your view, click the "Load" button to the right of the drop down menu.

Can I create multiple plans?

Yes; however, only one plan at a time may be kept as an active plan. Your counselor will mark the plan that you expect to follow as your active plan. This information may be used by university administrators to determine the demand for various courses each term.

Will my plans be saved?

Yes. DegreeWorks will allow you to save all plans you create; however, only one plan may be marked as active.

Will my counselor be able to see my plan(s)?

Your counselor can only see your active plan and participate with you in the planning process. You are the only person who can see the other inactive plans you may have saved. There is a notes feature for you and your counselor/advisor to keep additional information. Only one plan at a time may be kept as an active plan. When you meet with a counselor, your counselor will approve the plan that you expect to follow as your active plan. Subsequent changes will only be possible by the counselor. If you need to make changes to an approved plan, you must meet with a counselor.

If I put a course in my planner, am I automatically registered for that course in that future quarter?

No. Your planner is for planning purposes only. You will register online through MyPortal.

Is the course I planned guaranteed for that future quarter?

No. Your planner is for planning purposes only. Please see the appropriate schedule of classes for availability of courses. If you discover that a course you had planned is not being offered, please adjust your plan.

Can I print my plan?

Yes. There is a print button at the top of the planner.

I went through the steps to save my plan, but it is not there. How come?

There is a problem with saving plans if you are using a Safari browser that is older than Safari 5. You can either upgrade your browser or use another browser such as Firefox or Chrome.

Return to top