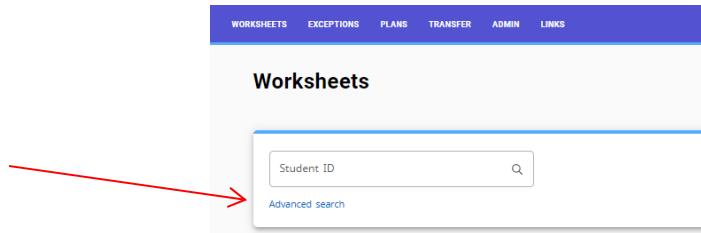


# DEGREEWORKS FOR ADVISORS: THE PLANS TAB

1. Get to DegreeWorks from your **Advisee Listing** on UCanWeb. If you are going to be looking at all of your students, use the right mouse button to open DegreeWorks in a new tab and preserve access to your advisee listing.
  - a. You can also use the Students drop-down menu on the SUNY Canton homepage to find a direct link to DegreeWorks or type in: [can.degreworks.suny.edu](http://can.degreworks.suny.edu)
2. Once in DegreeWorks, you can type in a Student ID number OR use the Advanced Search to look up a student by name.



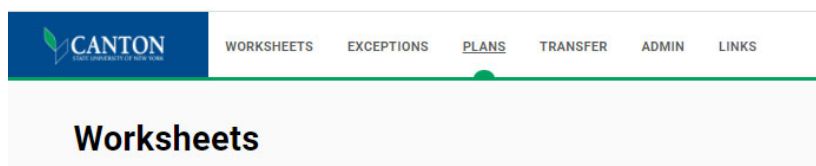
You can search for students by name, ID, Major, class standing, etc. or a combination of those:

A screenshot of the 'Find Students' search form. It has a title 'Find Students' and a close button 'X'. The form contains several input fields and dropdown menus. The first row has 'Student ID', 'First/middle name', and 'Last name'. Below that is a 'Curriculum' section with a dropdown arrow. The next row has 'Degree', 'Level', and 'Classification' dropdowns. The next row has 'Catalog year', 'Degree source', and 'Major (0/88)' dropdowns. The next row has 'Minor (0/32)', 'College (0/10)', and 'Specialization (0/0)' dropdowns. The next row has 'Concentration (0/54)', 'Liberal learning (0/0)', and 'Program (0/74)' dropdowns. The final row has 'Student type (0/11)' dropdown. At the bottom right, there are three buttons: 'Clear', 'CANCEL', and 'SEARCH'.

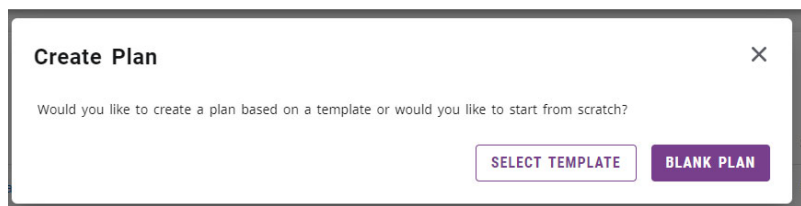
Press the **SEARCH** button. You can choose the whole list or just certain individuals

## PLANS:

Once you find a student, click on PLANS at the top of the page.



**Click on New Plan.** You can start with a blank plan or can select a template. Templates are best for new students. A graduation plan for someone who is almost done is best done with a blank plan.



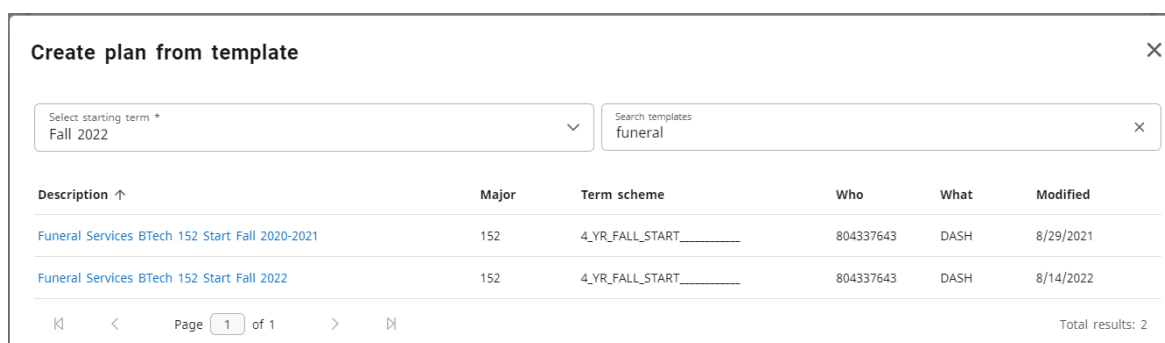
**Create Plan** [X]

Would you like to create a plan based on a template or would you like to start from scratch?

[SELECT TEMPLATE] [BLANK PLAN]

## Using a Template:

Click on the New Plan button on the Plans page. Click on Select Template. Choose the term that you want the Template to start from (generally the student's first semester). Use the search templates box to search on a keyword:



**Create plan from template** [X]

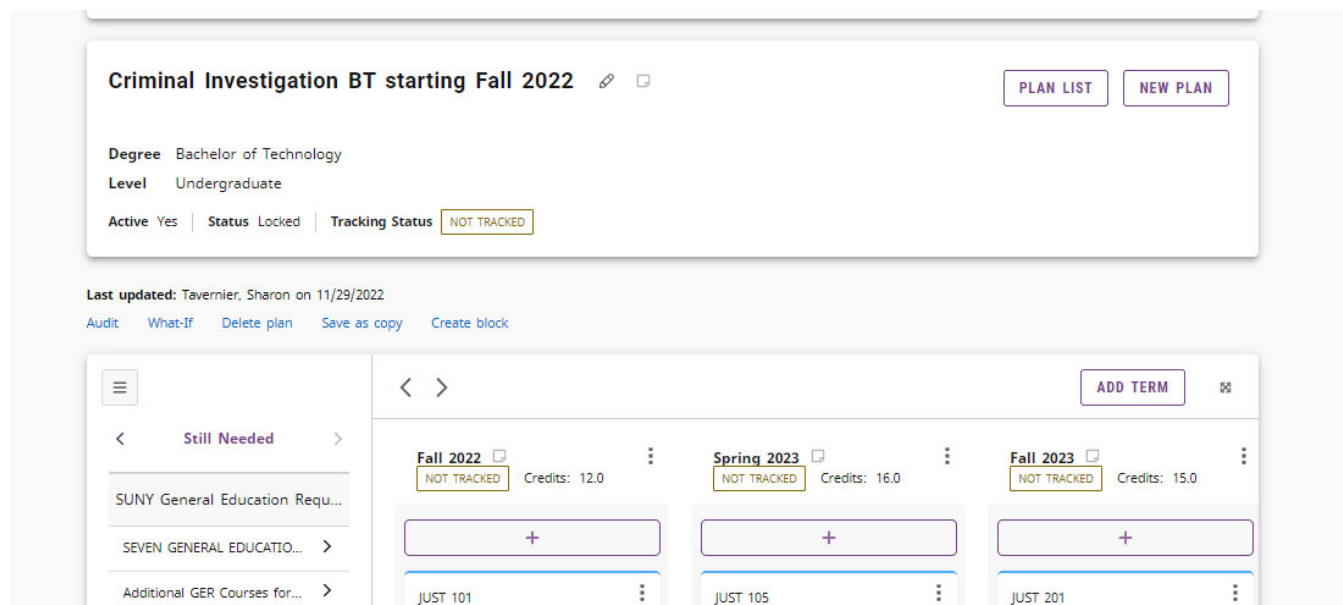
Select starting term \*  
Fall 2022

Search templates  
funeral

Description ↑	Major	Term scheme	Who	What	Modified
Funeral Services BTech 152 Start Fall 2020-2021	152	4_YR_FALL_START_.....	804337643	DASH	8/29/2021
Funeral Services BTech 152 Start Fall 2022	152	4_YR_FALL_START_.....	804337643	DASH	8/14/2022

Page 1 of 1 Total results: 2

There may be multiple templates per major if the major requirements have changed in the last few years. Students generally stick with the catalog year they came in under.



**Criminal Investigation BT starting Fall 2022** [EDIT] [DELETE]

[PLAN LIST] [NEW PLAN]

**Degree** Bachelor of Technology  
**Level** Undergraduate  
**Active** Yes | **Status** Locked | **Tracking Status** NOT TRACKED

Last updated: Tavernier, Sharon on 11/29/2022  
[Audit](#) [What-If](#) [Delete plan](#) [Save as copy](#) [Create block](#)

[MENU] [ADD TERM] [X]

Term	Credits	Tracking Status
Fall 2022	12.0	NOT TRACKED
Spring 2023	16.0	NOT TRACKED
Fall 2023	15.0	NOT TRACKED

[+]

JUST 101 | JUST 105 | JUST 201

Click on a template to have it populate for the student. You can edit the name of the plan by clicking on the pencil to the right of the Template name.

- Making the plan **Active** will enable tracking status and could be used in the future to predict enrollments.
- **Locking the plan** means that the student cannot change it (you still can).
  - o **An Active and Locked plan can be pulled into UCanWeb for the student to use to sign up for a semester's courses.**

### Edit Plan ✕

Description \*

Roody's four year plan

Active  Locked

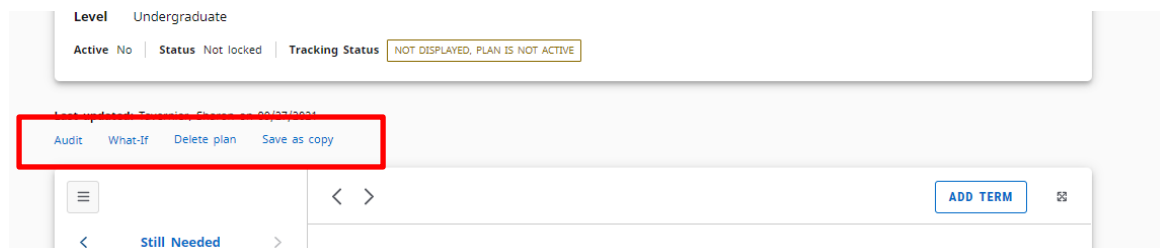
CANCEL SAVE

The plan will be filled in according to the degree checklist for that major/catalog year:

Fall 2021 <span>☐</span> Credits: 15.0	Spring 2022 <span>☐</span> Credits: 16.0	Fall 2022 <span>☐</span> Credits: 15.0
<input data-bbox="293 898 591 953" type="button" value="+"/>	<input data-bbox="638 898 935 953" type="button" value="+"/>	<input data-bbox="982 898 1279 953" type="button" value="+"/>
JUST 101 Credits: 3.0	JUST 105 Credits: 3.0	JUST 111 Credits: 3.0
ENGL 101 Credits: 3.0	JUST 110 Credits: 3.0	JUST 201 Credits: 3.0
PSYC 101 Credits: 3.0	SOCI 101 Credits: 3.0	JUST 209 Credits: 3.0
MATH 111 Credits: 3.0	@ with GEHU Credits: 3.0	JUST 210 Credits: 3.0
CITA 110 Credits: 3.0	@ with GENS Credits: 4.0	@ with GEAH Credits: 3.0
<input data-bbox="293 1625 591 1675" type="button" value="+"/>	<input data-bbox="638 1625 935 1675" type="button" value="+"/>	<input data-bbox="982 1625 1279 1675" type="button" value="+"/>

You can edit the plan as needed. Delete courses already completed. Drag and drop courses between semesters. Add Summer/Winter Terms using the **Add Term** button.

Click on Audit to see the planned classes show in the degree audit, Save as copy to duplicate the audit and show multiple scenarios.



### Notes:

- 1) When students get a choice, those are implemented with Pointers. You will see the term SEPPINTER in the audit and course tiles with an orange header when a choice is allowed. This indicates that a course is needed in the spot, but that the student can choose the exact course at a later time.
- 2) Click on courses on either side to bring up CourseLink and find out when the class is expected to be offered next.

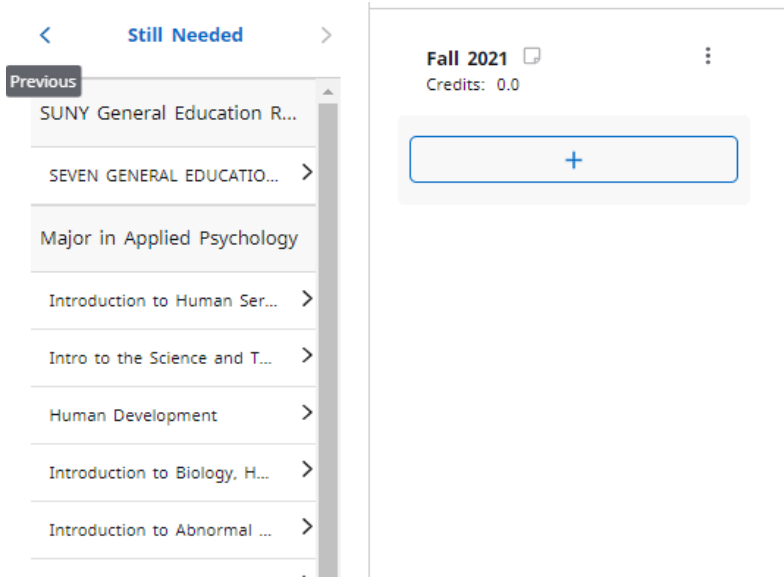
**When things don't go as planned.** You can adjust the plan as needed for transfer students, failed/withdrawn classes, getting ahead via summer/Winterterm. Return to the EDIT view.

### Starting with a blank plan.

First, you need to give the plan a name and save it to get a workspace started.

A screenshot of a dialog box titled 'Edit Plan' with a close button (X) in the top right corner. The dialog contains a text input field for 'Description \*' with the value 'Roody's graduation plan'. Below it is a dropdown menu for 'Degree' with 'Bachelor of Science' selected. At the bottom left, there are two checkboxes: 'Active' (unchecked) and 'Locked' (unchecked). At the bottom right, there are two buttons: 'CANCEL' and 'SAVE'.

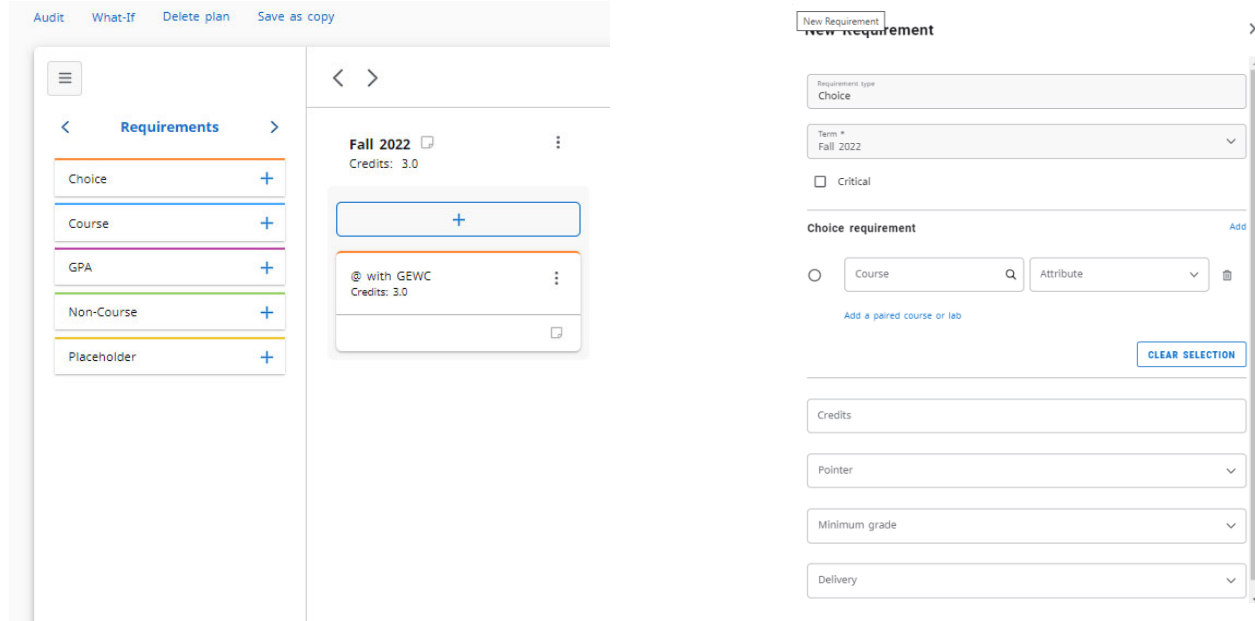
This will just give you one semester to start. Add Terms as needed using the Add Term button. Once you have an approximate number of semesters, you can start to add courses.



Use the **Still Needed** list on the left side for a list of courses that the student still needs to take. Drag and drop courses to fill in the plan. Shift this to the Requirements list to add a specific course that is not listed in Still Needed.

Fill out the blank plan by semester or for the whole degree as needed. Students can use this tool to personalize their completion plan and have it ready to run it by you.

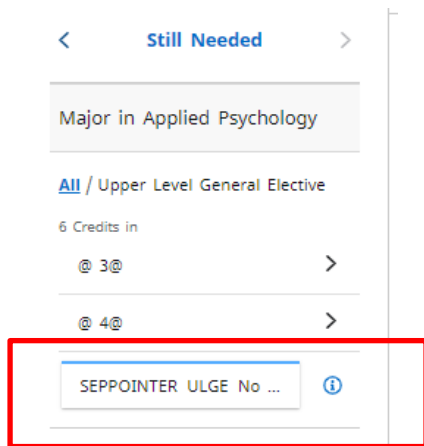
**To add a Placeholder** (student will need a Program Elective in the final semester, but we don't know exactly which one right now). Find the "Requirements" menu on the left side of the plan. Drag the Orange "Choice" tile to the semester you want to add a course to. Fill out as much as you can, utilizing the attributes if possible and the Pointer if it set up on courses in your major.



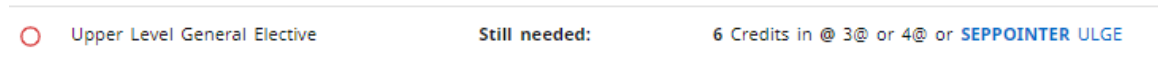
Also, you will begin to see **SEPPONTER** in the audit. This allows us to "point" to the requirement we are trying to fill in the Planner and get picked up by the audit:

You can see pointers in a couple of different places. Associated with the choice in the planner or directly in your audit:

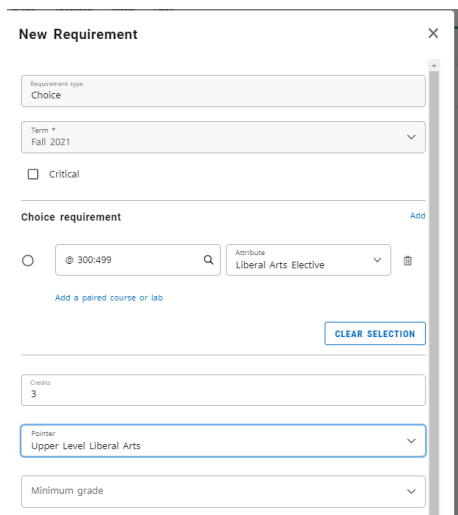
In the planner under still Needed:



In the audit under the list of possible courses:



As one example, here is how to list Upper Level Liberal Arts worked into your plan. Pointer is for ULLA or Upper Level Liberal Arts. This tells the auditor that a course that will meet this requirement is planned a particular semester.



List of Pointers:

Key/SEPPONTER	Description
ACCT	Accounting Elective
ENGL	English Elective
GEAH	GER 4 – American History
GEBC	GER 10 – Basic Communication
GEFA	GER 8 – Fine Arts
GEHU	GER 7 – Humanities
GEMATH	GER1 – Math
GENS	GER 2 – Natural science
GEOW	GER 6 – Other World Cultures

GER3456	Choose a GER 3,4,5 or 6
GER3456789	Choose a GER 3,4,5,6,7,8, or 9
GER456	Choose a GER 4,5 or 6
GER5689	Choose a GER 5, 6, 8 or 9
GER789	Choose a GER 7,8 or 9
GERANY	Choose any GER
GESS	GER 3 – Social Science
GEWC	GER 5 – Western Civilization
GENELEC	General Elective
INTALT	Internship or Internship Alternative
INTERN	Internship
LAE	Liberal Arts Elective
MAJELEC	Major Elective
MATHSCI	Choose a math or science course
MinElec	Minor Elective
PREL	Program Elective
PREL2	Program Elective – take 2
PROORGERELEC	Program or General Elective
ULGE	Upper Level General Elective
ULGER	Upper Level General Education Requirement (GER)
ULLA	Upper Level Liberal Arts
ULME	Upper Level Major Elective
ULPE	Upper Level Program Elective

Use the Audit link to see planned courses in the audit:

Level Undergraduate  
 Active No | Status Not locked | Tracking Status NOT DISPLAYED, PLAN IS NOT ACTIVE

Last updated: Tavernier, Sharon on 09/27/2021  
[Audit](#) [What-if](#) [Delete plan](#) [Save as copy](#)

Still Needed

**Major in Applied Psychology** INCOMPLETE

Credits required: 91 Credits applied: 68 Catalog year: Fall 2021 GPA: 4.00

Unmet conditions for this set of requirements: 92 credits are required. You currently have 68, you still need 23 more credits.

Course	Title	Grade	Credits	Term	Repeated
HUSV 100	HUMAN SERVICES FORUM	PLAN	(1)	Fall 2021	
PSYC 101	Introduction to Psychology	A	3	Spring 2021	
HUSV 201	INTRO TO HUMAN SERVICES	PLAN	(3)	Fall 2021	
ABAP 245	INTRO TO APPL BEHAVIOR ANALYSIS	PLAN	(3)	Fall 2021	
SOCI 101	INTRO TO SOCIOLOGY	PLAN	(3)	Spring 2022	
PSYC 225	HUMAN DEVELOPMENT	PLAN	(3)	Spring 2022	

Plans are visible to the student and to anyone in their success network. This can be a way to collaborate in our student's success!