Degree Works Tutorial
Information for Students & Advisors on How to Create & View Plans
Spring 2013
What is the Planner?

• A new feature in Degree Works that will allow you to make short and long-term plans for degree completion and verify that the courses included on your plan will fulfill your degree requirements.
Why should you use the Planner?

• To help you stay on track to graduate during a desired time frame.
• To help you plan for registration in upcoming semesters
• To help you avoid last minute issues when applying for graduation.
• To help you better understand your remaining degree requirements.
• To help you prepare for advising appointments.
To Begin Using the Planner...

- Log into your MyRU portal, then access the Degree Works.
- Click the Planner Tab (beside the Audit tab) at the top of your Degree Works screen.
The Planner is divided into two parts. Your current Worksheet appears on the left side of the screen. The Planner appears on the right. You can increase or decrease each side by dragging the gray bar in the middle of the screen to the left or right.
You will see several functions on the Planner (right). Let's review...

Save – which saves your planner for keeping or submission. Process New – which pulls all your courses over to your Worksheet (left). Reload Form – resets your planner to start over. Save As – which allows you to save new plan off an existing one. Check All Terms/Uncheck All Terms – which allows you to choose which terms you want to process new into your worksheet for viewing.
If you do not have an existing plan, this drop-down menu will automatically set to "add new plan". If you have one or more saved plans, your plans will be listed here along with an "add new plan" option. Use the "load" button to load the one you want to view.
This drop-down menu controls the way you view the planner. In Notes mode, the plan will be formatted as seen below and will include a place to add notes for each semester to the right of each term.
You may also view the plan in Planned vs. Taken Mode, by selecting it from the same drop down menu previously shown. This function will not work unless you have an existing plan in place.
What is your major?

- If you are a declared major, you may begin creating your plan starting with the next slide.
- If you are a “pre-major” (ie: Undeclared, Pre-Nursing, Pre-Business, etc.) you will need to secure a printed “What If” audit from your Academic Advising Center or Registrars Office for the full or intended (if undeclared) major before attempting to create your plan. You will have to use the “What If” hard copy as a guide to create your plan as it will only show Core Curriculum at this time. Most of your planned courses, aside from Core curriculum, will end up at the bottom of your worksheet as Electives until you declare a major and re-process your plan.
To begin your plan, type a description for the plan in the “Description” field on the planner side (right). Select your catalog year using the “Sel Cat Yr” drop down box. If you are pre-major (undeclared, Pre-Nursing, Pre-Business) please review the previous slide before continuing with this step.
Use the Term Selection drop down to label each future term in which you plan to enroll. You can plan as many terms in the future as you would like as this is just an intended plan and you can change it each term as needed.
Next, scan your worksheet (on the left) using the scroll bar in the middle of the page. You will be looking for any requirements marked at “Needed.”
Drag and drop the “needed” courses from your worksheet to the term that you plan to take that course. You can also type courses directly into the Planner fields. To do so, use the course prefix (e.g., MATH), a space, and the three digit course number followed by the number of credits.
Add any pertinent notes can be added to the Notes field beside each term in which they apply. These notes can be for your benefit or discussed with your advisor before approvals. Note that these notes can be viewed by various advisors and faculty so be mindful of what note you add.
When you have completed entering courses, click the “save” button. You can also save periodically while you are working if you have multiple semesters to enter. To save without submitting, click “No” to the pop up below. This will allow you to view your courses and how they will apply before submitting to your advisor for approval. You will receive another pop up that states “plan saved successfully”.

Pop up selection window
Save Plan Button
To view your courses in the worksheet after you saved without submitting, click the “Check All Terms” button in the planner (left bottom), this will place checks in each term box for use in your worksheet view.
Now select the “Process New” button. This will refresh the Worksheet (right) with the courses you have planned. Each time the worksheet will revert to the previous state so that you can process new each term to see your progress.
After you view and are satisfied with your plan, click “Save Plan” and then “yes” in the pop selection window. This will lock your plan so that you and your advisor can review. It should be approved/rejected at your next advising appointment.

Save Plan & Yes for approval
You will notice after you submit “yes” for approval, your plan will now “This Plan is pending approval and has been locked”. You cannot edit your plan at this point, if you wish to make changes you must consult your advisor.

Status after submission
Once your plan has been approved by your advisor or advising center, it will currently show locked and approved below. Also, any previous plans will become marked as Inactive and cannot be used.
What should I do now that my plan has been saved/submitted to my advisor for approvals?

• You should discuss your plan with your faculty advisor, then contact your Academic Advising Center to schedule an appointment for review of your submitted plan and have it approved or rejected.

• If your plan is approved, then it marked “Active” and should be reviewed each subsequent term during advising. If you need to make changes to coursework, you must create a new plan, submit and have it approved. This will make the previous plan “Inactive” and unusable.

• If you plan is rejected, you can make the necessary changes to the rejected plan and resubmit for approvals.