Using DegreeWorks Plans (for Advisors & Students) - Templates

Note: Optimum web browser for use with DegreeWorks Plans is Google Chrome or Firefox

To begin using Plans, from a DegreeWorks worksheet, click on “Plans”.

If there is an existing Plan(s), it will be listed under “List of plans”. You may edit an existing Plan by highlighting it and double-clicking to open it.

If you wish to create a new plan either from scratch or from a template, select “New Plan”.

If a Plan already exists for the student, or upon saving a Plan and/or exiting Plans, clicking on the Plans tab again will give the Advisor and the Student a Calendar view of the plan. The Plan displaying in Calendar view can be edited by selecting Edit from the View pull-down menu. Select View Plan List to see the list of all of the student’s Plans.
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If no Plans exist or you wish to create a New Plan, you will be prompted to Create a New Plan. Select from either a “Blank Plan” or “Select Template”. A blank plan is a plan built from scratch for one or more terms, whereas a template is from one of MSU's degree programs. Proceed to the next steps for creating a Plan from a Template. See separate instructions for using Blank Plans.

To select a template from the list of MSU’s degree programs, you can scroll through the list of templates to find the appropriate one, or enter a keyword or phrase in the ‘Search by Template Description’ box, then click “Go”. Notice many Templates have multiple Math starts. Upon finding the appropriate template, double click on it to open.

Next, you will be prompted to select a starting term. Choose the term for which you would like the degree program to begin, then click “OK”. Note: most templates are intended to be a Fall term start.
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**Note:** Templates are the department’s recommended order of courses to take each term. However, once a template has been selected in DegreeWorks Plans, as it appears below, it can now easily be edited and personalized for the student.

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**Editing/Personalizing a Template**

To move existing courses into another term, simply move your cursor to the blank area directly surrounding a requirement (shown in blue), then click and drag the entire line to the desired term.

To add new requirements to the term, you can select a requirement from the term’s + icon, or you can click and drag specific courses from the Still Needed or Master course lists on the right side of the screen into the term.

To delete a requirement from a term, click on the appropriate requirement until it is highlighted in blue, then click the icon.
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Advisors can add notes to an individual requirement within a term, to the term as a whole, or to the entire Plan. Note: students can view notes but cannot enter notes themselves. Hint: Advisors may use Notes to include student’s registration PIN.

Advisors: to add a note, click on the icon to open it, then click “Add Note”. Upon completing the note, click “Done”. When a note is entered, the solid icon turns to one with lines and can be opened by an advisor or student to read fully, or hovering over it will display the first few words of the note.

A summary of all notes can also be viewed by selecting “Notes” from the View pull down menu.
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Be sure to Save the Plan periodically.

If a course in the plan is missing some pre- or co-requisites for one or more courses, this Validation Error will appear upon clicking Save:

As the error message states, you can click ‘Cancel’ to see which courses within the Plan have missing pre- or co-reqs and resolve the error by editing the Plan. Or, you can continue without resolving the error by clicking OK.

Note: students may still be prevented from registering for a course without the appropriate pre- and/or co-requisite despite being able to save it in their Plan.

Upon clicking ‘Cancel’ to view and resolve the error, you will see a highlighted warning symbol, whereby you can hover over it to view the specifics of the pre- or co-req error and edit the plan accordingly to include the pre- or co-req; or edit by changing the course entirely.

Note: Upon saving the Plan with the error, the highlighted warning symbol of which course(s) in the Plan have the missing pre- and/or co-reqs will disappear until the Plan is edited again.

DegreeWorks does not recognize courses on a Choice Requirement as courses that are planned to be taken, so the Validation Error will also appear if a pre- and/or co-req is listed as a Choice. To resolve this, doubleclick to open the Choice Requirement and select one of the choices by clicking on the appropriate radial button. The Plan will now indicate the selected choice, but the choices still appear if you change your mind later.
Audit from the Plan is a way to ensure the requirements entered into the Plan match what is required for the degree program.

Planned courses will display in blue on the Plan Audit.

Note: the Plan Audit cannot be saved; the student’s worksheet remains the most accurate checklist of requirements.
Upon completion of building or editing a Plan, an Advisor can ‘Lock’ a Plan. A locked Plan will allow the Plan to be sent to CatCourse where the student will register for courses. A student can still open and view a Locked Plan, and even edit it by saving it with a new title, but the Locked Plan will remain as an advising record.

The ‘Active’ box allows for a plan to be tracked with the student’s worksheet and/or audit.