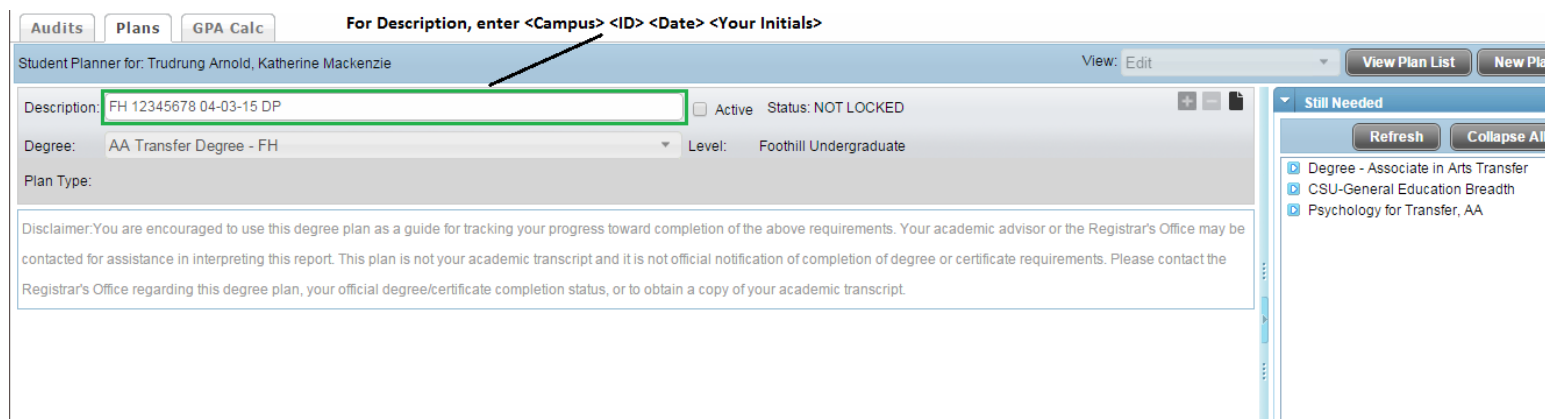# Plans

The Plans feature of Degree Works allows students to create a plan that includes courses the student should take for either a single term or a series of terms. Plans can be created from a blank slate with the student selecting all desired courses.

Creating a Blank Plan

To create a plan, begin by clicking on the Plans tab located near the top of the screen. This will open a pop-up box from which the user must select either "Blank Plan" or "Select Template" to proceed.
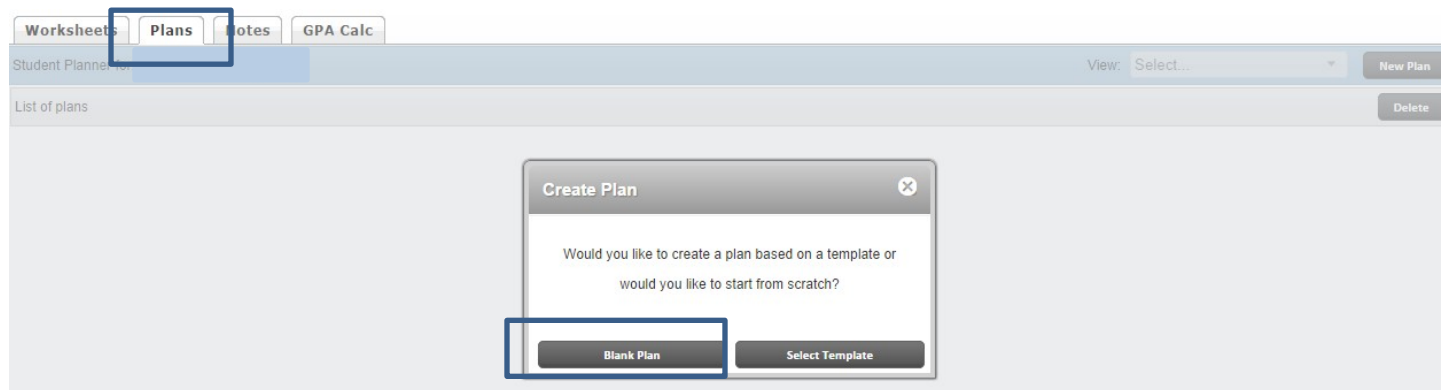
Once "Blank Plan" has been selected, the following screen will appear. Begin creating the plan by adding a description in the available text box. This is a required field and must be filled in before the plan can be saved. The naming convention for the Description is <Campus: DA for De Anza or FH for Foothill> <Your student ID> <Today's Date> <Your Initials>. An error message stating, "This field may not be empty or contain only spaces" will appear if the field is left blank. The Degree field and Level will be auto-populated based on student information extracted from your MyPortal account.
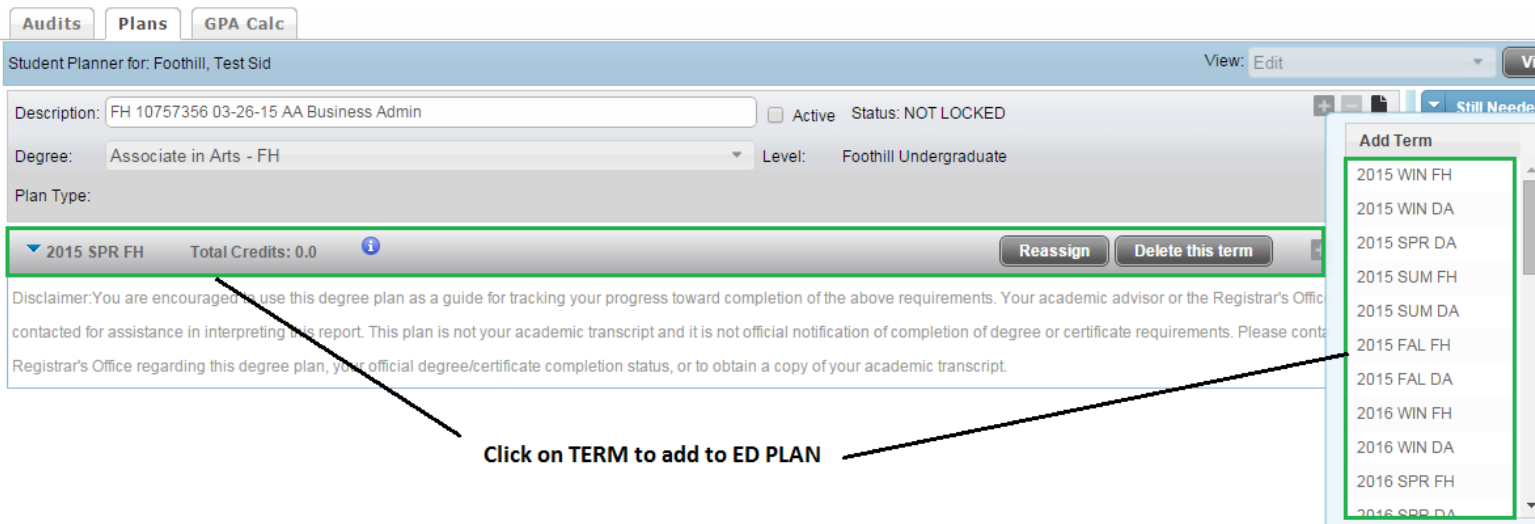
Active and Locked Plans

Multiple plans can be saved; however, only one plan can be active at a time. To mark a plan as active, check the "Active" indicator located at the top of the screen to the right of the plan description before saving. **Note: Counselors have the ability to inactivate a plan created by a student and activate his/her own plan created for the student.**

Plans can only be locked by your Counselor. This prevents anyone from making changes to the plan. To determine whether or not a plan has been locked, look at the "Status" indicator located to the right of the plan description.

Adding Terms to the Plan

To add a term to the plan, click on the + (located to the right of the description header) and choose a term from the drop-down menu. Repeat this process until all desired terms have been added to the plan.
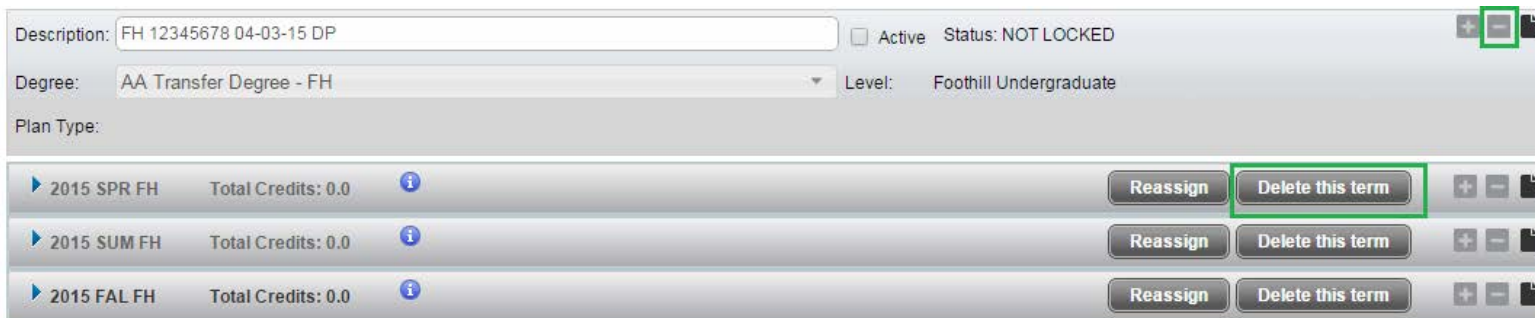
As terms are selected, they will appear on the plan as seen above.

Deleting Terms from the Plan

To delete a term from the plan, click on the desired term (it will now appear in bold font) and then click on the – (located to the right of the description header). You can also delete a term by clicking the Delete This Term button located within the term's header bar.

You will receive a confirmation box before the term is deleted. If you wish to proceed, click yes. If you received this box by mistake and do not wish to delete the term, click Cancel. **Note: If you select yes, the term will be deleted from the plan including any requirements assigned to the term.**
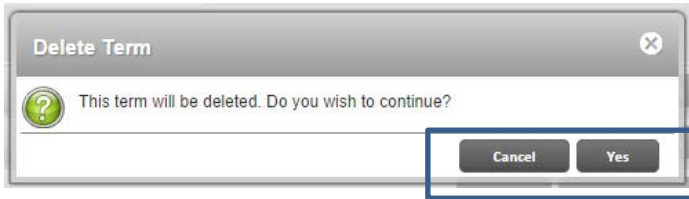

Reassigning a Term

If the term being deleted contains courses or requirements that need to be saved, the term can be reassigned rather than deleted. Click on the "Reassign" button located in the term's header bar.

This will open a drop-down box. Select the desired term and click OK. If reassignment was accessed by accident, click Cancel to exit without making a change to the term.
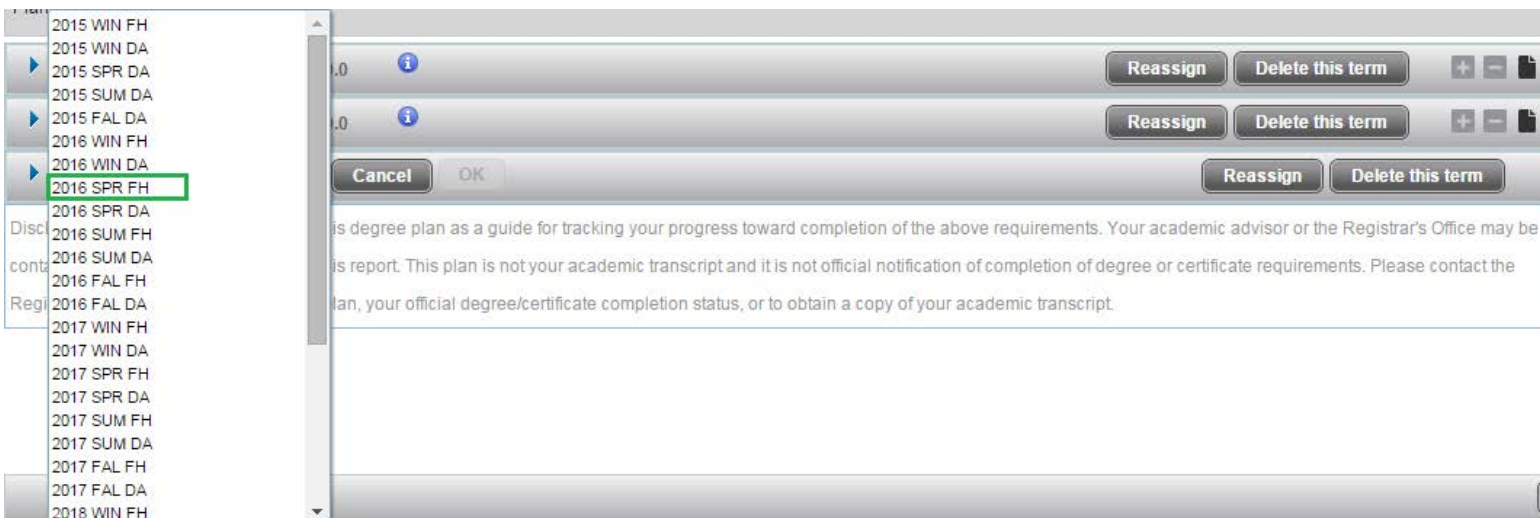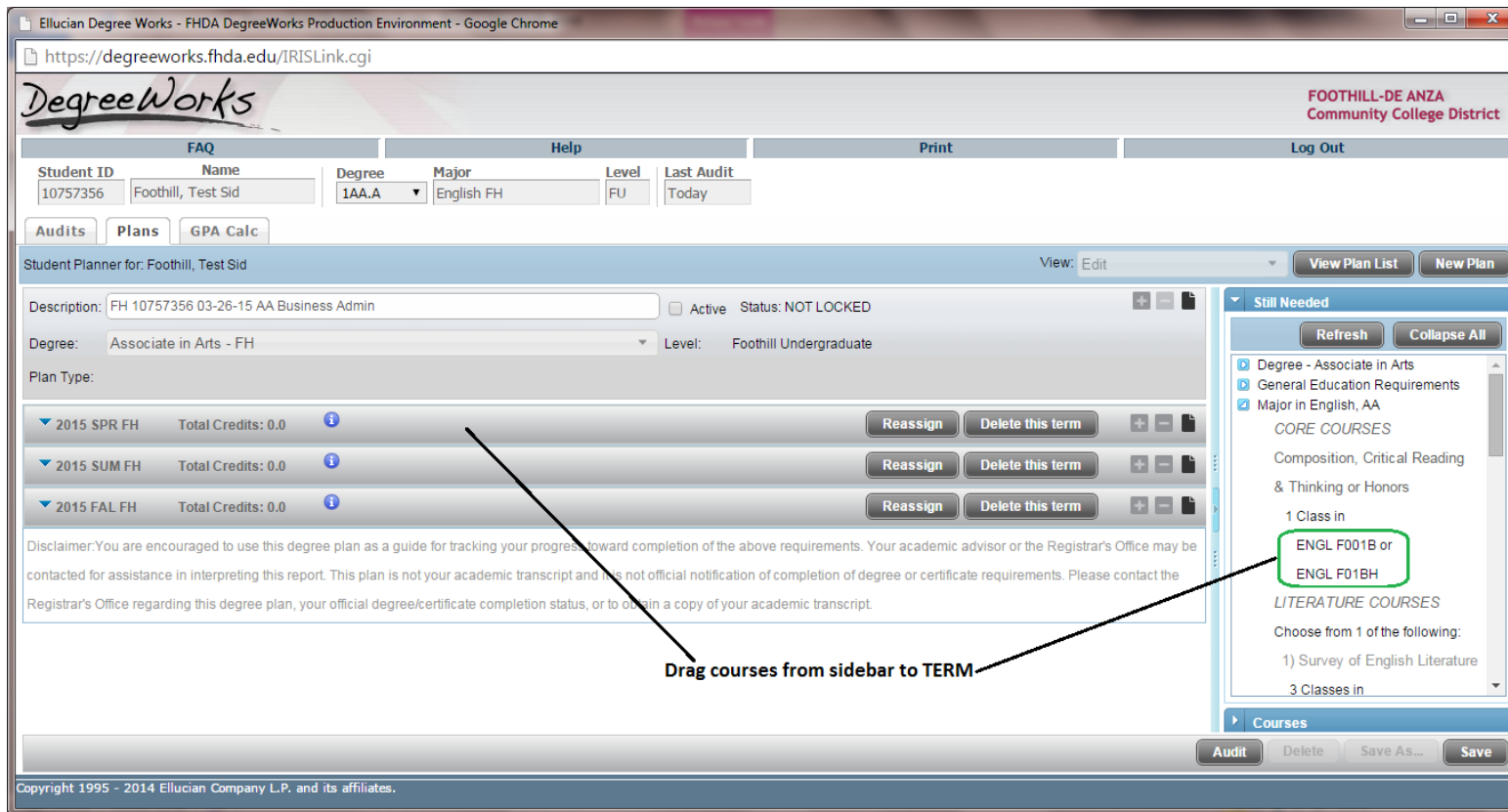
Adding Courses to the Plan

There are multiple ways to add courses to a term—you can drag and drop courses or you can use the navigation tools found in the term's header bar.

Using the Drag and Drop Feature to Add Courses

There are two selection boxes, found at the right of the screen, from which you can select desired courses—a "Still Needed" box (which opens by default) and a "Courses" box (which is collapsed and found at the bottom of the screen).

The Still Needed box is pulled from the degree plan and includes all courses that have not yet been completed. These courses are sorted by block and can be expanded by clicking on the arrow found to the left of each category.

Drag course from sidebar to TERM

Adding a Course Requirement

The Course requirement adds a single course to the plan; very similar to the drag and drop feature. To add a Course requirement, click on the + icon found in the header bar of the desired term and choose "Course". A requirement bar will be added.

To add a blank course field click here

Click on the magnifying glass icon to open the course search function.

If the course search function is opened, type any portion of the course subject and/or number into the course box to return all results. Once the desired course has been located, click on the course and it will be added to the course box. See the example below.

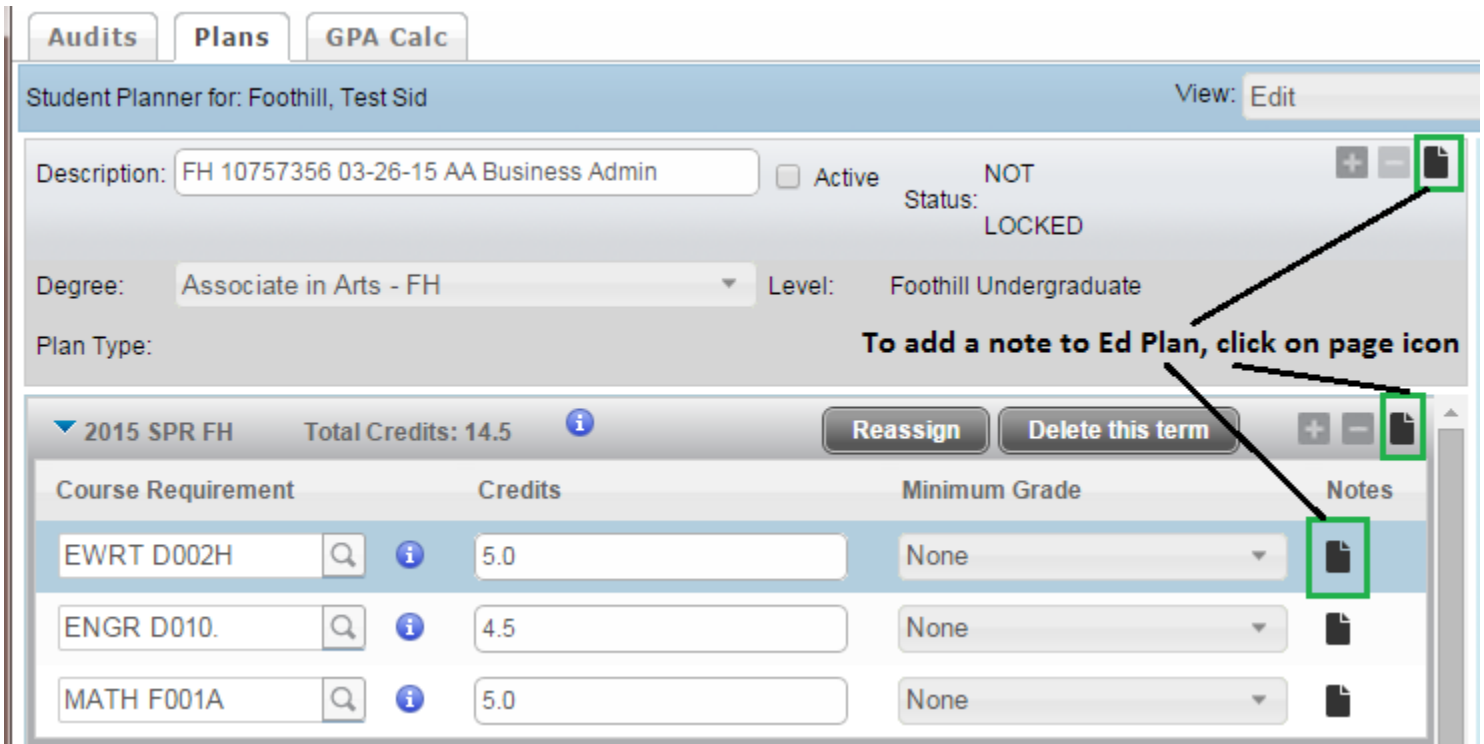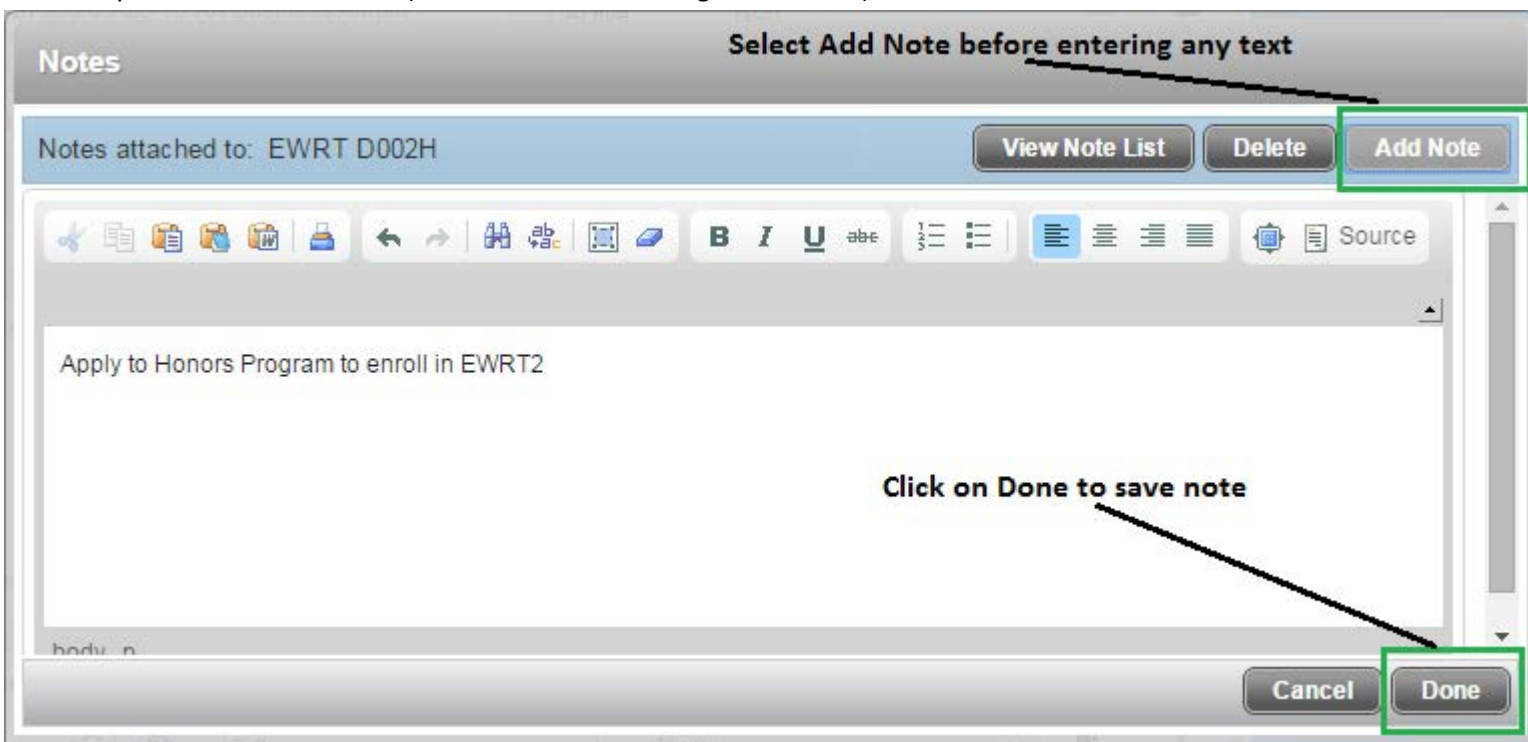## Adding a Note to a Plan Requirement

Notes can be added at the Plan, Term or Course level. To add a note, click on the note icon as follows.

Clicking this icon will open the Notes box for the specified requirement. If a note already exists, it will appear in this box   and can be selected for either editing or deletion. To add a note, click on "Add Note" found in the upper right corner. Add the desired text in the box provided and click Done (located at the bottom right of the box) to save the note.

Once the note has been saved, the note icon next to the requirement will be green.

Deleting a Note from a Plan

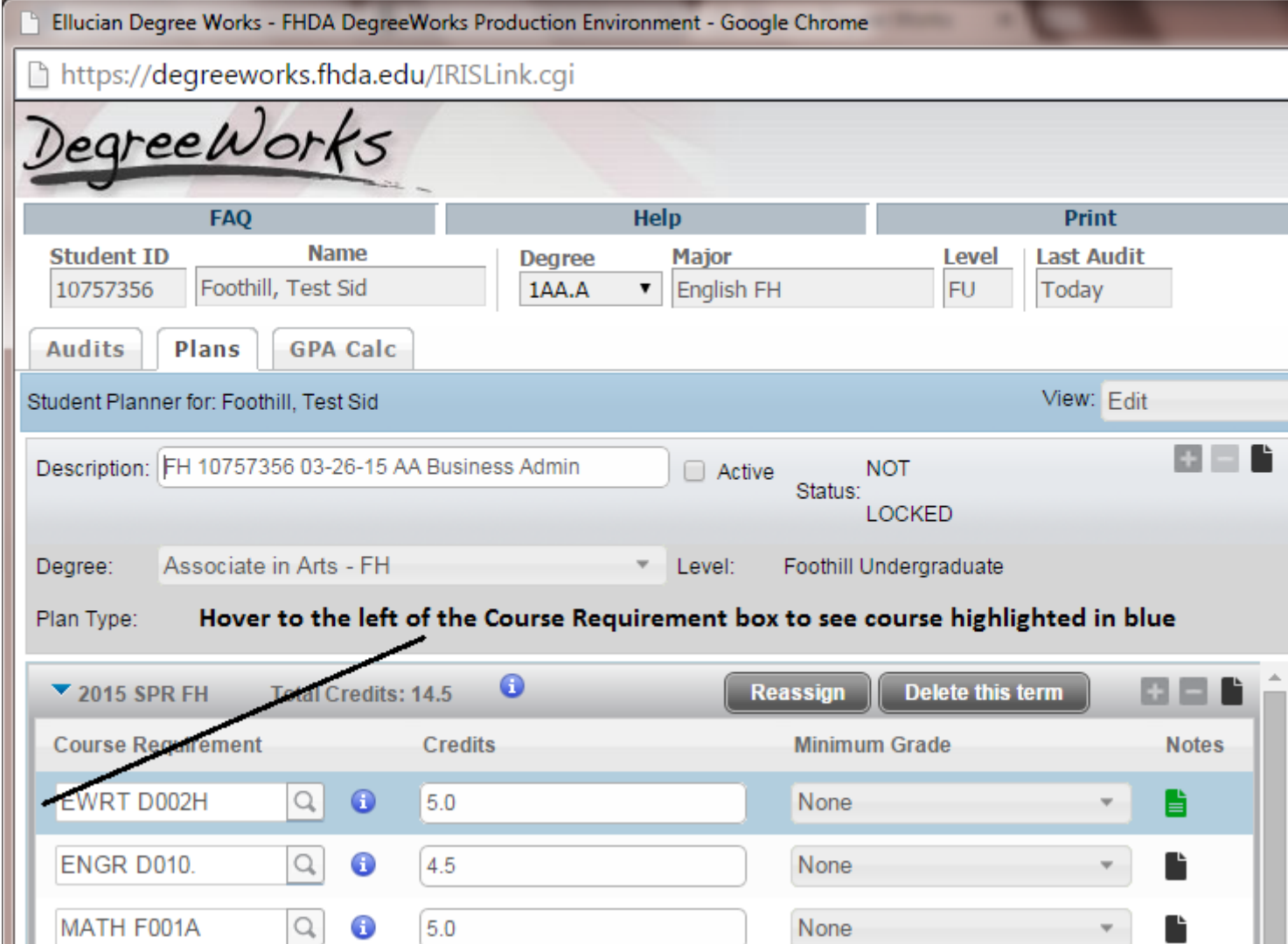To delete an existing note, click on the green note icon to open the Notes box. Highlight the desired note and click on Delete, found at the top right of the Notes box. Click Done to finalize the deletion.

Deleting Courses from a Term

To delete a course from a term, click on the course to be removed and click on the – icon located on the far right of the Term Header bar.

Note: As soon as the – icon has been submitted the requirement will be removed from the term—a warning will not be given. If you accidentally remove a requirement, you will have to manually add it back to the term.
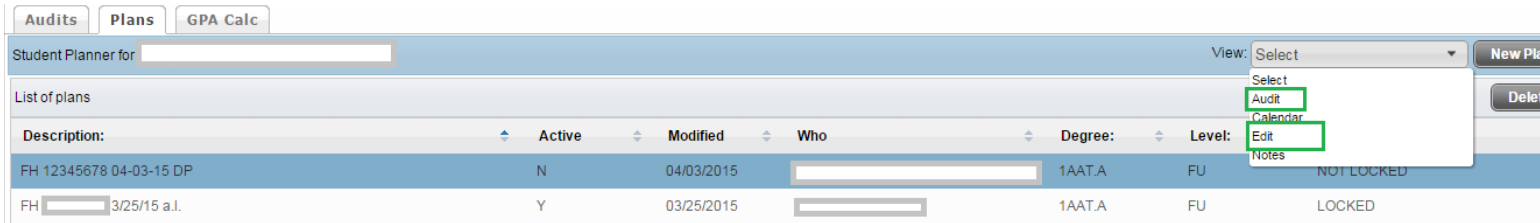
Saving a Plan

Once a plan has been created, it must be saved or the data will be lost upon exiting either the Plans tab or Degree Works. To save the plan, click the Save button located at the bottom right of the screen.

Editing a Saved Plan

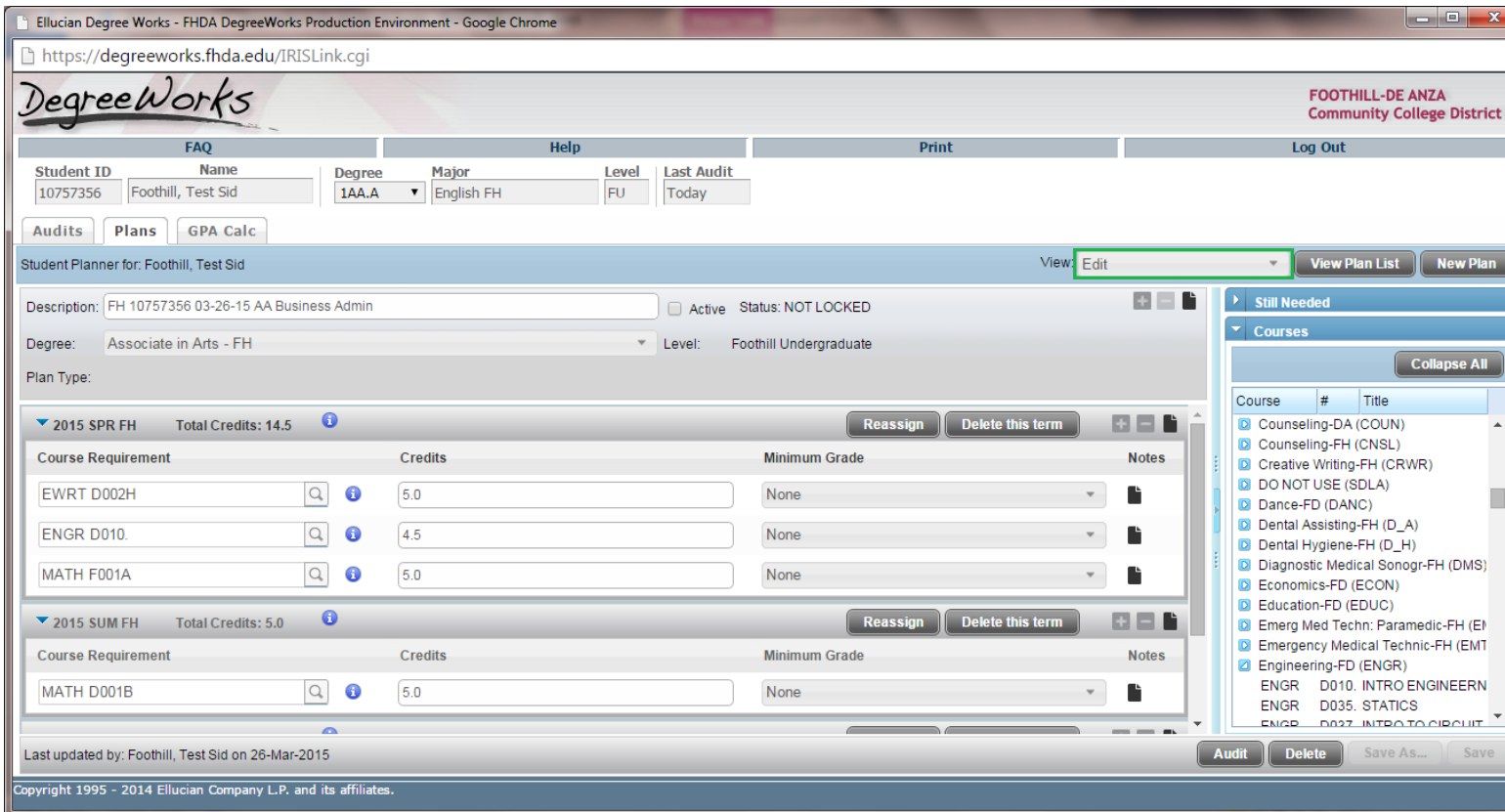To edit a plan that has been saved, open the Plans tab. All existing plans will be listed under "List of Plans."

Click on the desired plan to highlight it, then click on the "Select" View box to open the plan in either the audit view or the edit view. **Note: Double-clicking on the plan will automatically open the plan in the compact view. To open the plan in a different view, click on the "Select" View box to select an alternate view.**

Edit View of a Plan

The Edit view returns the user to the original plan where all navigational tools are available to make alterations

Running an Audit with a Plan

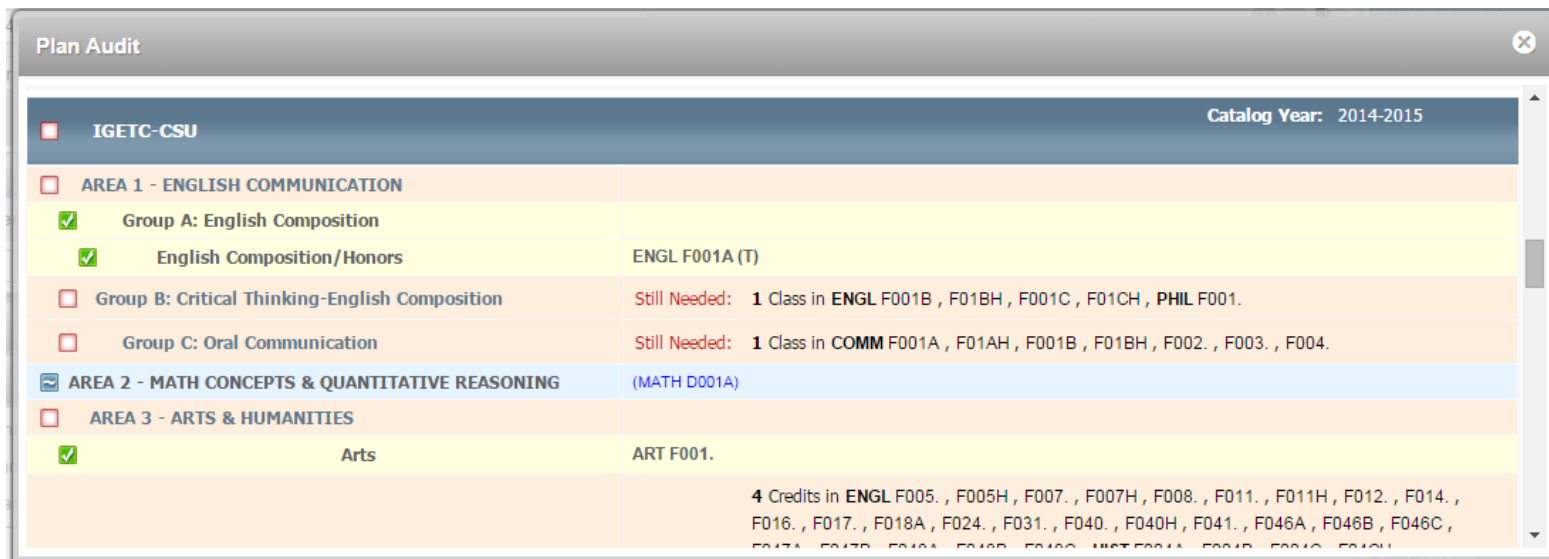An Audit can be run using a plan to see how courses on the plan will be applied to the student's degree requirements. To run an audit using a plan, enter the edit view of the plan and select the "Audit" button found at the bottom right of the screen.
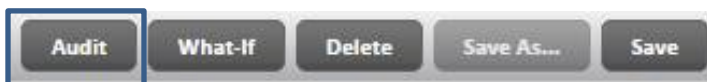
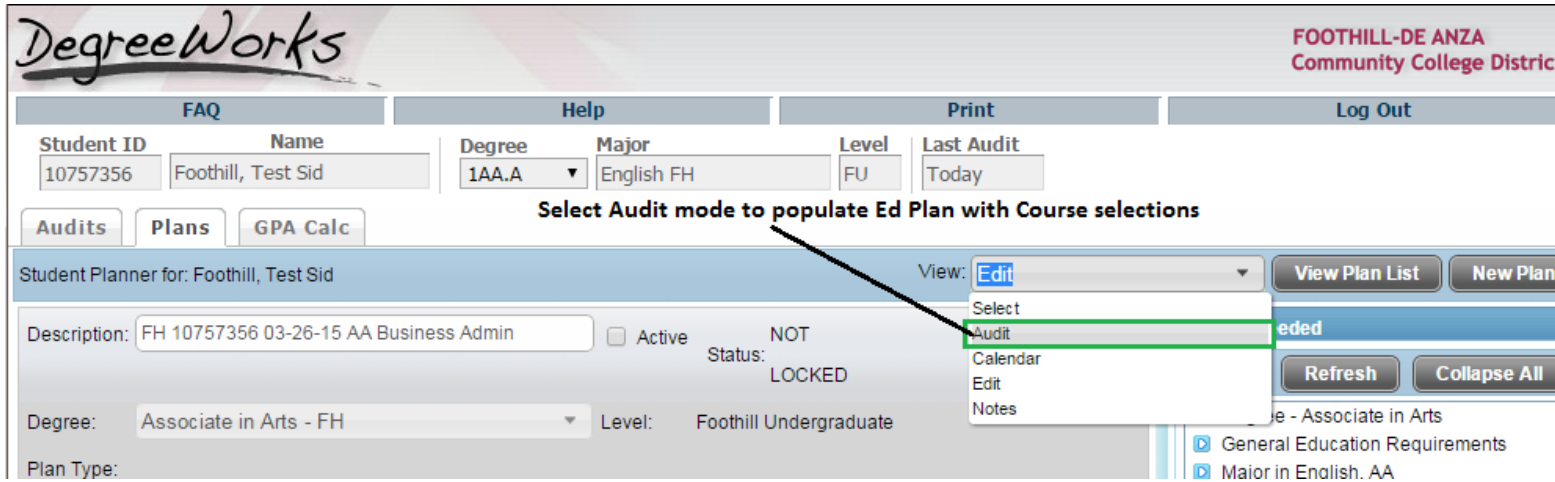An pop-up box labeled "Plan Audit" will now appear.
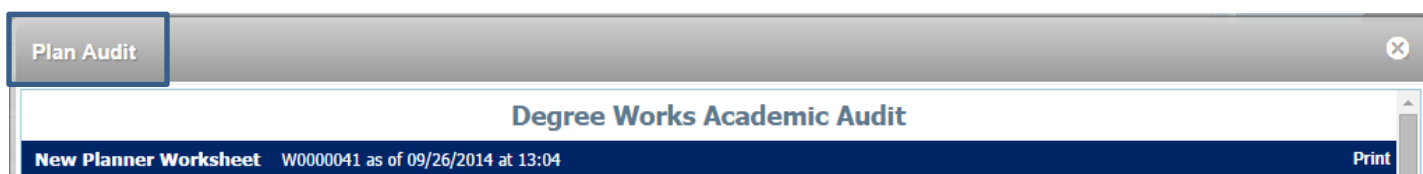
Scroll through the audit to view how previously completed, in-progress and planned courses are applied to the degree requirements. Remember to exit the plan audit when done. See example below.

Viewing Plan in Audit mode

Select Audit mode to populate Ed Plan with Course selections

Drag courses and drop on to the Plan

Select course to drag & drop on to Ed Plan

Printing a Plan

Select Notes to print Ed Plan with notes; Select Calendar to print without notes

| Audits | Plans | GPA Calc |

Student Planner for: Foothill, Test Sid   View: Edit ▾
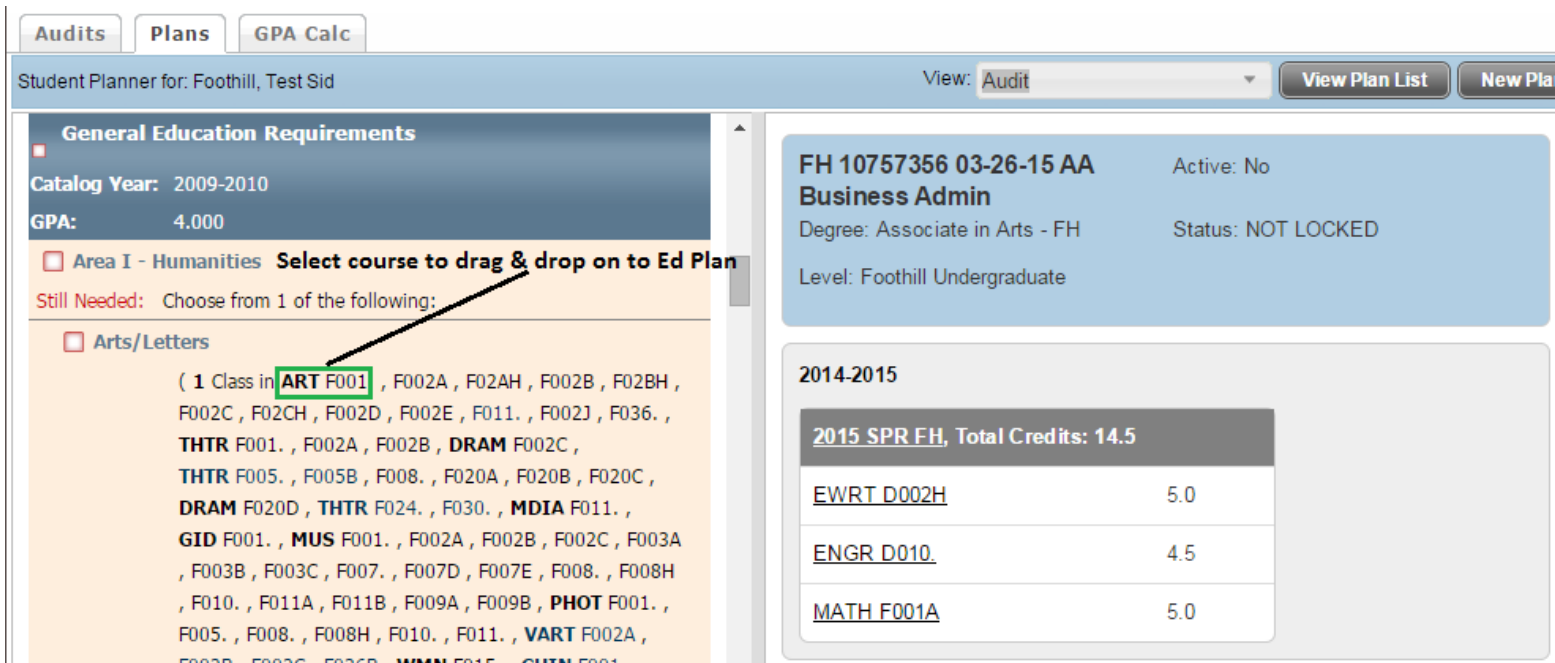
Select
Audit
Calendar
Edit
Notes

Description: FH 10757356 03-26-15 AA Business Admin   ☐ Active   Status: NOT LOCKED

Degree: Associate in Arts - FH ▾   Level: Foothill Undergraduate

Calendar mode Printing:

| Audits | Plans | GPA Calc |

Student Planner for: Foothill, Test Sid   View: Calendar ▾   View Plan List   New Plan

| ENGR D010. | 4.5 |
| MATH F001A | 5.0 |

2015-2016

| 2015 SUM FH, Total Credits: 5.0 | 2015 FAL FH, Total Credits: 0.0 |
| MATH D001B   5.0 | |

Selecting print will bring up pop-up window
(Pop-up blocker should be turned off)

Disclaimer: You are encouraged to use this degree plan as a guide for tracking your progress toward completion of the above requirements. Your academic advisor or the Registrar's Office may be contacted for assistance in interpreting this report. This plan is not your academic transcript and it is not official notification of completion of degree or certificate requirements. Please contact the Registrar's Office regarding this degree plan, your official degree/certificate completion status, or to obtain a copy of your academic transcript.

Last updated by: Foothill, Test Sid on 01-Apr-2015   Audit   Print

Notes mode printing: