DEGREE WORKS STUDENT EDUCATIONAL PLANNER (SEP) BEST PRACTICES

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TOPICS FOR DISCUSSION

▶ Ellucian Documentation
▶ Student Educational Planner (SEP) Overview
▶ Best Practices
▶ User Decision Tree
▶ Hands on Experience
▶ Feedback
TOPICS FOR DISCUSSION

• User Access

• Creating and Maintaining Templates

• Creating and Maintaining Plans

• Requirements on Plans/Templates
What is SEP?

- Student educational planner integrated into DGW
- Tool to help students stay on track for graduation
- Tool for advisors to help students plan and stay on track
- Highly Customizable Degree Plan
SEP OVERVIEW

- Why use SEP? Just another Tool (But same password)
  - Enhance student advising experience
  - Managing Case Loads
  - Tracking critical requirements; notes, etc.
Requirements can be flagged as critical for tracking
Minimum grade, campus, and delivery method added for course requirements
Multiple View options
Customize requirements
Who will use SEP? (identified populations, all students, etc.)

How many plans will be active?

Who will create/edit/maintain Plans?

Who will create/edit/maintain Templates?
Creating and Maintaining Templates

- Building Templates from Programs of Study/Catalog

- Keep in Mind
  - Decisions made related to tracking
  - Critical requirements
  - Non-course requirements
  - GPA requirements
CREATING AND MAINTAINING TEMPLATES

✦ Creating Templates

✦ Loading Templates into Individual Student Plans

✦ Loading Templates by Batch
  
  ✦ Who will manage this?

  ✦ When would processes be run?
BUILDING PLANS

▶ Building PLANS

▶ Building a Simple Plan

▶ Building Plans to track critical requirements, on-track/off-track

▶ Retrieving and Modifying Plans

▶ Plan Views
### PLAN VIEW - CALENDAR

#### Back to Self Service
- Degree: Bachelor of Business Admin
- Level: Undergraduate

#### Academic Year 2014-2015
- **Fall 2014**, Total Credits: 9.0
  - **ENGL 1101**: 3.0
  - **MATH 1111**: 3.0

#### Academic Year 2015-2016
- **Fall 2015**, Total Credits: 12.0
  - **ARTS 1501**: 3.0
  - **ACCT 2001**: 3.0
  - **ECON 2101**: 3.0
  - **BUS 1101**: 1.0
  - **POLS 2451**: 3.0
  - **MATH 1111**: 3.0

- **Spring 2016**, Total Credits: 15.0
  - **ACCT 4115**: 3.0

### On-Track
- **Spring 2016**, Total Credits: 9.0
  - **ENGL 2110 or ENGL 2121 or ENGL 2122 or ENGL 2141**: 3.0

### Tracking Status
- On-Track

### Active Status
- Yes

### Status
- LOCKED
**PLAN VIEW - AUDIT**

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### BBA in Accounting

<table>
<thead>
<tr>
<th>Degree:</th>
<th>Bachelor of Business Admin</th>
</tr>
</thead>
<tbody>
<tr>
<td>Level:</td>
<td>Undergraduate</td>
</tr>
<tr>
<td>Status:</td>
<td>LOCKED</td>
</tr>
<tr>
<td>Tracking Status:</td>
<td>On-Track</td>
</tr>
</tbody>
</table>

#### Academic Year 2014-2015

<table>
<thead>
<tr>
<th>Off Track</th>
<th>On Track</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fall 2015</td>
<td>Spring 2015</td>
</tr>
<tr>
<td>ENGL 1101</td>
<td>ENGL 1101</td>
</tr>
<tr>
<td>ENGL 1101</td>
<td>ENGL 1101</td>
</tr>
<tr>
<td>MATH 1111</td>
<td>MATH 1111</td>
</tr>
</tbody>
</table>

#### Academic Year 2015-2016

<table>
<thead>
<tr>
<th>Off Track</th>
<th>On Track</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fall 2015</td>
<td>Spring 2015</td>
</tr>
<tr>
<td>ARTS 1101</td>
<td>ARTS 1101</td>
</tr>
<tr>
<td>ACCT 2101</td>
<td>ACCT 2101</td>
</tr>
<tr>
<td>ECON 2101</td>
<td>ECON 2101</td>
</tr>
<tr>
<td>BUSA 1101</td>
<td>BUSA 1101</td>
</tr>
<tr>
<td>POLS 2401</td>
<td>POLS 2401</td>
</tr>
<tr>
<td>MATH 1111</td>
<td>MATH 1111</td>
</tr>
</tbody>
</table>

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**Plan View Details**

- **Degree Status**: Active - Yes
- **Degree**: Bachelor of Business Admin
- **Level**: Undergraduate
- **Tracking Status**: On-Track

**Courses Overview**

- **ENGL 1101**: English Composition II (Satisfactory by ENGL1102 - English Composition II-Dartmouth College)
- **Math 1111**: College Algebra
- **Tourism 1101**: Survey of African-American Experience (Satisfactory by COMM1110 - Public Speaking-Dartmouth College)
- **ENGL 2222**: African American Literature
- **Art 1101**: Fine Arts - Select One Course

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**Note**: The table above outlines the courses for the BBA in Accounting degree, highlighting the academic years 2014-2015 and 2015-2016. The plan is monitored for tracking status and On-Track status as indicated.
PLAN VIEW - EDIT
Student should take physical education before graduation.

Manager, Degree Works | 2015-08-27 14:28:07

Student needs counseling

Manager, Degree Works | 2015-08-27 14:28:07
- List of all plans
- Can sort by columns
- Select any plan and/or desired view
- User must have access to create/delete plans from list
• Description must be unique and is required
• Degree loads from values in student header
• Active and locked status can be modified if access permits
• Tracking status will display if tracking enabled
Select template from list

Only active templates will display, depending on access

Can use search functionality to filter active templates

Template description loads as plan description by default, but can be modified
• Select starting term
## Creating Plans From Templates

**Student Planner for: Carell, Steve Gru**

**Description:** BBA in Accounting

**Degree:** Bachelor of Business Admin

**Tracking Status:** Not displayed, plan is not active

### Fall 2015
- **Total Credits:** 9.0
- **Critical Hours:** 3.0
- **Course Requirement:** ACCT 4116
- **Credits:** 3.0
- **Minimum Grade:** None
- **Campus:** None
- **Delivery:** None
- **Notes:**

### Spring 2016
- **Total Credits:** 3.0
- **Critical Hours:** 3.0
- **Course Requirement:** ACCT 4116
- **Credits:** 3.0
- **Minimum Grade:** None
- **Campus:** None
- **Delivery:** None
- **Notes:**

### Fall 2016
- **Total Credits:** 3.0
- **Critical Hours:** 3.0
- **Course Requirement:** ACCT 4116
- **Credits:** 3.0
- **Minimum Grade:** None
- **Campus:** None
- **Delivery:** None
- **Notes:**

### Spring 2017
- **Total Credits:** 0.0
- **Critical Hours:** 0.0
- **Course Requirement:**
- **Credits:** 0.0
- **Minimum Grade:** None
- **Campus:** None
- **Delivery:** None
- **Notes:**

### Fall 2017
- **Total Credits:** 0.0
- **Critical Hours:** 0.0
- **Course Requirement:**
- **Credits:** 0.0
- **Minimum Grade:** None
- **Campus:** None
- **Delivery:** None
- **Notes:**

### Spring 2018
- **Total Credits:** 0.0
- **Critical Hours:** 0.0
- **Course Requirement:**
- **Credits:** 0.0
- **Minimum Grade:** None
- **Campus:** None
- **Delivery:** None
- **Notes:**

**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.
- Unlimited number of requirements can be added to terms
- Requirements can be moved with drag/drop
- Definitions of requirements for plan/template creators
SUMMARY

User Access

Creating and Maintaining Plans

Creating and Maintaining Templates

Requirements on Plans/Templates
QUESTIONS?