# Degree Works

SEP User Guide

Office of the Registrar
September 2025

# Table of Contents

# Introduction

The Faculty & Staff Overview should be reviewed in full before proceeding with this document.

The Student Educational Planner (commonly referred to as SEP) is a module within Degree Works which allows for the creation of individualized degree plans. Templates for the full course sequence for every associate's and bachelor's program at the University are available within SEP, and users may also build custom plans from scratch. Plans built in SEP can be run against the student's degree audit to ensure that the plan will successfully lead them to graduation.

Once a plan has been tailored to the individual student's academic goals, the plan can be "locked" to prevent any changes by the student and made "active" so the student's completed and in-progress coursework can be evaluated against the contents of the plan. A student's status as "On Track" or "Off Track" based on their planned requirements can then be monitored on institutional reports.

This document is intended to serve as a comprehensive overview of the functionality of SEP. Any questions about determining suitable coursework for a particular student or about the requirements for a specific program should be directed to the academic advisor for the student's major.
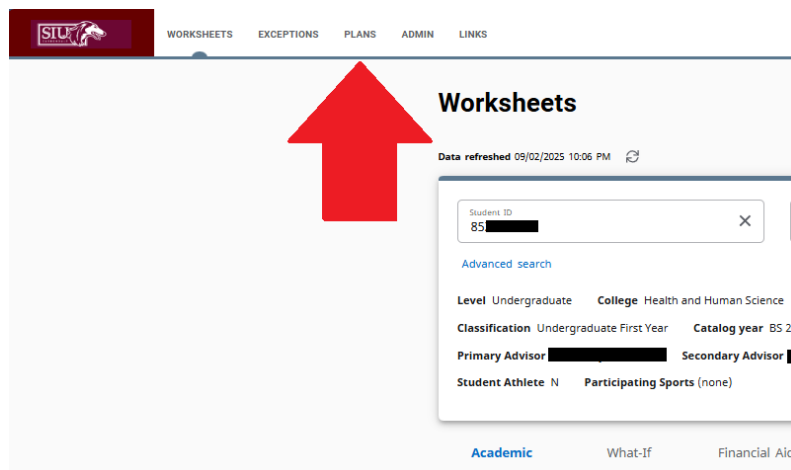
The Student Educational Planner is not a substitute for academic advising sessions and may require ongoing maintenance to individual student plans to function as intended.

All the functions described in this document take place under the "Plans" tab at the top of the Degree Works landing page. If this option is not available, an access request should be submitted.

Any questions about this document or the functionality of SEP should be directed to degreeworks@siu.edu.

# Getting Started

Search the Dawg Tag for the student you will be building a plan for, and press "Enter" to be taken to their degree audit. Click the "Plans" tab.



If the student already has a plan, it will be listed in the "Plan List" box. Students can have multiple plans here.



- Description – The name of the plan.
- Active – Indicates whether the plan is being tracked or not (requires that the plan also be locked). More information about tracking status can be found on pages 21-23.
- Modified – The date the plan was last modified.
- Who – The individual or process that last modified the plan.
- Degree – The degree that the plan is assigned to. Much like the "Worksheets" tab, plans are also driven by degree.
- Level – The level that the plan is assigned to.
- Status – Indicates whether the plan is locked or not. Plans that have been locked cannot have any changes made by the student. Other SIU staff members can still edit these plans.

Click the description for a plan (in blue text) to be taken to that plan. The trash can icon on the right side can be used to delete a plan (this cannot be undone).

# Creating a New Plan

If the student is pursuing multiple degrees concurrently, the degree that the plan will be associated with must be selected in the "Degree" drop-down in the header.



Click the "New Plan" button to create a new plan.



In the box that appears, there are two options. To use a predefined template for the student's program, click "Select Template." To build a plan from scratch, click "Blank Plan."

## About Templates

In SEP a "template" refers to a predefined 2- or 4-year course sequence that has been built for a specific academic program. The steps in the following pages can be used to find the template that matches the student's declared program, which can then be assigned to the student as a plan. Templates are approximations of the course sequence for a given program, which once assigned can be modified to best suit the student.

As part of the annual catalog process, the Registrar's Office creates an updated fall-start template for any program that submitted a form 90A specifying changes to that program's curriculum requirements. The chief academic advisor for each college is then notified that new templates are available for the specified programs and ready for review. For any program that had a new fall-start template created during the catalog process, a corresponding spring-start template is typically created around September.

Due to the decentralized nature of the review process, the Registrar's Office cannot independently verify the accuracy of any SEP template or plan. Updates to templates can be made at any time at the request of the academic advisor. Changes that are made to a template do not affect student plans that have already been created using that template; any updates made are restricted to that template and will appear on student plans created using that template going forward.

## Template Naming Convention

SEP templates follow a naming convention (examples below). Slight deviations exist depending on the needs of the program and cohort that the template is for:

1. The program code for the major, comprised of the two-character college code, the two- or three-character degree code, and two- to four-character major code (ex. "AL BS FERM," "BY BA ECON," etc.). These codes can be looked up here.
2. If the template is tailored to a specialization, the full name of the specialization will be next.
3. Next is a description of the cohort that the template is for. This is usually "FRESHMAN" or "TRANSFER." Some programs may have templates indicating "ONLINE" status or a specific extended campus site.
4. Spring-start templates will have "Spring" in the title. Fall-start templates do not. No summer-start templates exist.
5. If a catalog year range is appended at the end, this is the **last** catalog year that the template is effective for. The set of templates for the current academic year can be identified by the absence of a catalog year from the end of the title. See the next page for further explanation on how templates are organized regarding catalog year.

AL BA CHEM BUSINESS FRESHMAN

ER BS IMAE QUALITY MANAGEMENT - UNIV CENTER LAKE COUNTY

BY BA ECON FINANCIAL ECONOMICS FRESHMAN SPRING

HH BA PSYC FRESHMAN SPRING

AM BFA ART METALSMITHING FRESHMAN

ER BS CEGR FRESHMAN 22-23

## Assigning a Plan from a Template

On the "Create Plan" window, click "Select Template" to be taken to the "Create Plan From Template" window.



- Description – The name of the template.
- Level – The level of the degree that the template is for. At this time, only undergraduate (UG) programs are supported in Degree Works.
- Catalog Year – The **end year** of the **first** catalog year that the template is effective for.
  - On the server end, Degree Works uses the end year for a given catalog to refer to that year (i.e. "2025" = 2024-25).
  - When a template is created by the Registrar's Office, the "Catalog Year" field is populated with the effective year for that template (i.e. "2025" = a template that is valid starting with the 2024-25 catalog year).
  - When the academic unit requests curriculum changes and a new template is created, the catalog year range for the **last** effective catalog for that template is appended to the end of the title of the old template (i.e. "25-26" at the end of the title means that the last valid year for that template will be the 2025-26 catalog, and after that an updated version should be available). In cases where the template is only valid for one catalog year, the year range in the title will refer to the same year as the "Catalog Year" column.
- College – The college code for the template's program.
- Degree – The degree code for the template's program.
- Major – The major code for the template's program.
- Program – The program code for the template (should be a combination of the last 3 fields).
- Term Scheme – A description of the length of the plan (generally 2YR or 4YR), its status as a fall or spring start, and whether summer terms are included.
- Who – The staff member who last edited the template.
- Modified – The date that the template was last modified.

1. Select the starting term for the plan from the drop-down menu to the left. Use fall or spring terms only; summer-start templates do not exist. The term's status as "Fall" or "Spring" must match the "Fall Start" or "Spring Start" in the "Term Scheme" column for that template. The year in this field does not have to align with the "Catalog Year" for the template.
   - Two approaches can be taken for summer-start students depending on previously completed coursework:
     1. Assign a spring-start template and delete the first spring from the plan.
     2. Assign a fall-start template and add the preceding summer to the plan.
2. Scroll through the available templates or use the "Search Templates" field to find a specific one. When you have found the template you want to assign, click the description for that template (blue text) and it will assign itself to the student as a plan. You can now make changes to the student's plan as detailed on pages 14-20.

## AL BS BCH FRESHMAN ✏ ▭

PLAN LIST    NEW PLAN

**Degree** Bachelor of Science
**Level** Undergraduate

**Total planned credits** 123.0

**Active** No | **Status** Not Locked | **Tracking Status** ▭ NOT DISPLAYED, PLAN IS NOT ACTIVE

**Last updated:** ▮▮▮▮▮▮▮▮
Audit    Delete plan    Save as copy

| ≡ | ‹ › | ADD TERM ⤢ |
|---|---|---|

‹ **Still Needed** ›

Major in Biochemistry

| SUPPORTIVE SKILLS | › |
| CHEMISTRY INTRODUCTOR... | › |
| MATHEMATICS | › |

**Fall 2025** ▭  ⋮
Credits: 17

+

ENGL 101    ⋮
Credits: 3.0
Minimum grade: C
▭

**Spring 2026** ▭  ⋮
--- Credits: 16

+

ENGL 102    ⋮
Credits: 3.0
Minimum grade: C
---    ▭

**Fall 2026** ▭  ⋮
--- Credits: 17

+

CHEM 330    ⋮
Credits: 5.0
---    ▭

## Assigning a Blank Plan

1. Click "Blank Plan" on the "Create Plan" window. Select the first term that the student will be attending classes at SIU and click "Submit."

**Select a Starting Term** ✕

Please select a term to serve as your starting term for this plan

Select term *
Fall 2026                                                              ⌄

CANCEL    **SUBMIT**

2. Enter a name for the plan and check the "Locked" box. This will prevent the student from being able to make changes to the plan. These can be changed at any time.

**Edit Plan** ✕

Description *
Grey Dawg's Graduation Gambit: Grit, Guts & Glory

☐ Active    ☑ Locked

CANCEL    **SAVE**

3. Click "Save" to be taken to the planner. Only the starting term specified in step 1 will have populated; additional terms need to be added manually. You can now make changes to the plan as described on pages 14-20.

**Grey Dawg's Graduation Gambit: Grit, Guts & Glory** ✏ ▢          **PLAN LIST**    **NEW PLAN**

**Degree**  Bachelor of Science
**Level**  Undergraduate

**Total planned credits**  0.0

**Active**  No  |  **Status**  Locked  |  **Tracking Status**  NOT DISPLAYED, PLAN IS NOT ACTIVE

Last updated:▮▮▮▮▮▮▮▮▮▮▮▮
Audit    Delete plan    Save as copy

☰          〈 〉                                                    **ADD TERM**    ⛶

〈    **Still Needed**    〉          **Fall 2026** ▢          ⋮
                                          - - -   Credits:  0
University Core Curriculum Re...
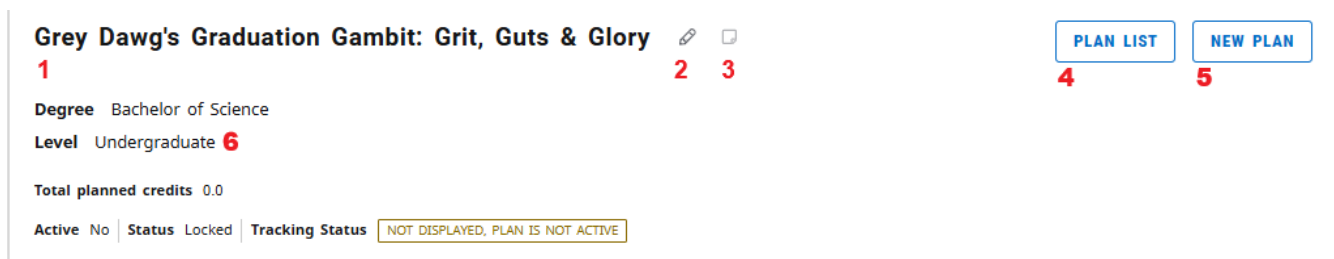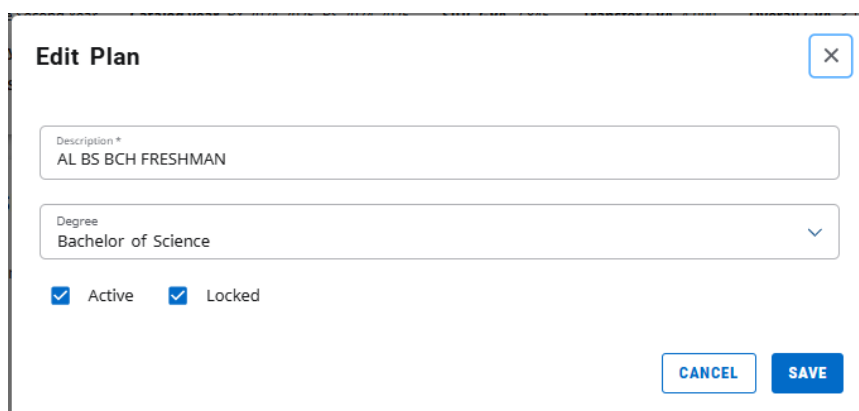
# Planner Layout

## Plan Header

The plan header contains information about the plan as well as some master functions:

**Grey Dawg's Graduation Gambit: Grit, Guts & Glory** ✏ ☐     PLAN LIST    NEW PLAN
**1**                             **2**    **3**          **4**      **5**

**Degree** Bachelor of Science
**Level** Undergraduate **6**

**Total planned credits** 0.0

**Active** No | **Status** Locked | **Tracking Status** `NOT DISPLAYED, PLAN IS NOT ACTIVE`

1. The name of the plan.
2. Returns to the "Edit Plan" window.

**Edit Plan**       [×]

Description *
AL BS BCH FRESHMAN

Degree
Bachelor of Science    ⌄
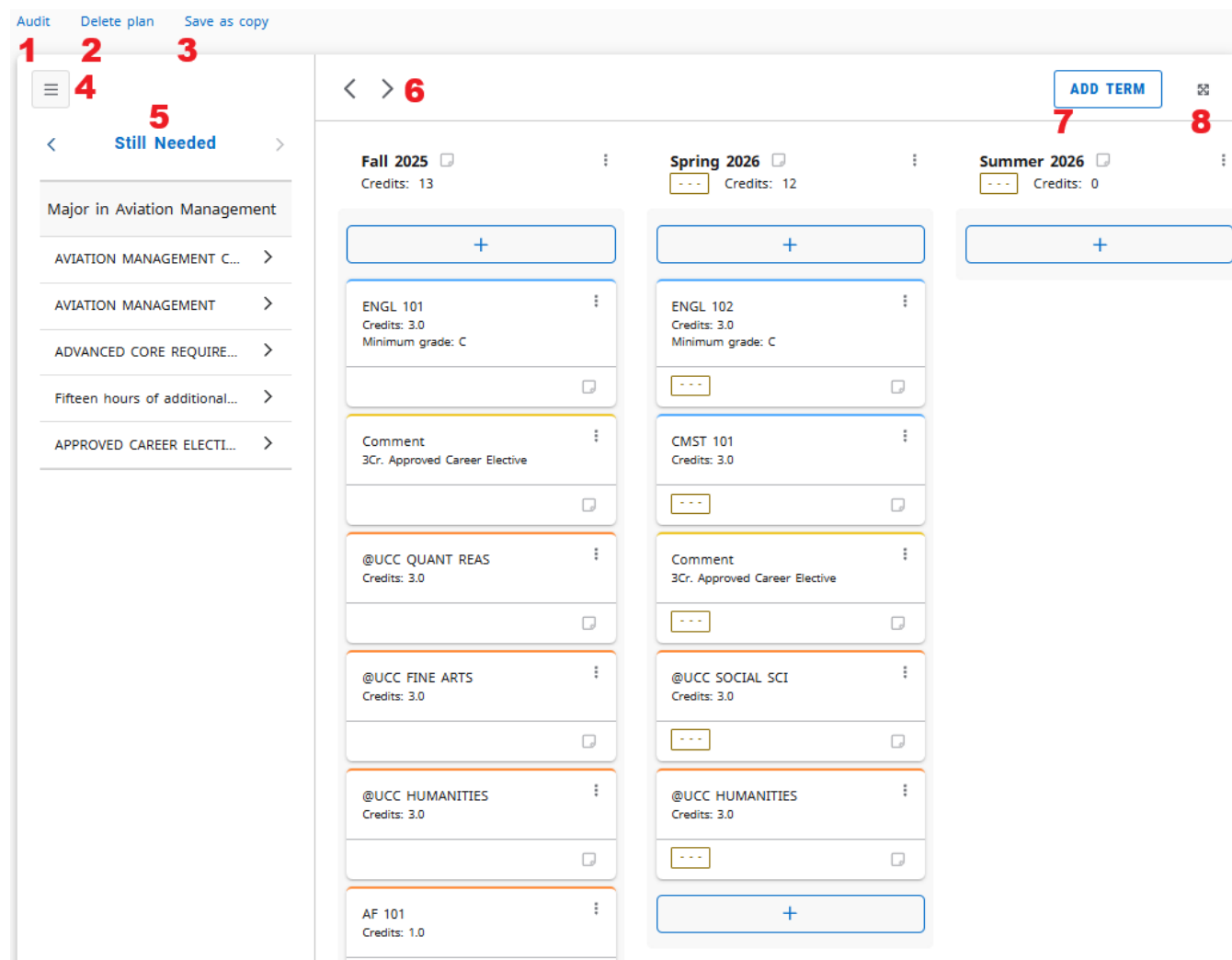
☑ Active    ☑ Locked

CANCEL   SAVE

- Description – Change the name of the plan here.
- Degree – If the student is pursuing multiple degrees concurrently, the degree that the plan is assigned to can be changed here. Does not display for single-degree students.
- Active – Enables tracking for the plan, allowing the student's completion of their planned requirements to be monitored on institutional reports. Tracking is only enabled if the plan is also locked; the "Active" box serves no purpose on unlocked plans.
- Locked – Locks the plan from edits by students. Other SIU staff can still edit these plans.

**NOTE:** Students can have multiple active plans, and multiple locked plans, but only one plan *per degree* that is both active *and* locked. This plan will have tracking status assessed.

3. Notes – Comments related to the plan can be added and viewed here.
4. Plan List – Shows all plans that have been assigned to the student.
5. New Plan – Shows the "Create Plan" window.
6. Various Plan Information:
   - The Degree and Level that the plan is assigned to.
   - The total number of credits on the plan.
   - Active and locked statuses.
   - Tracking status.

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## Planner

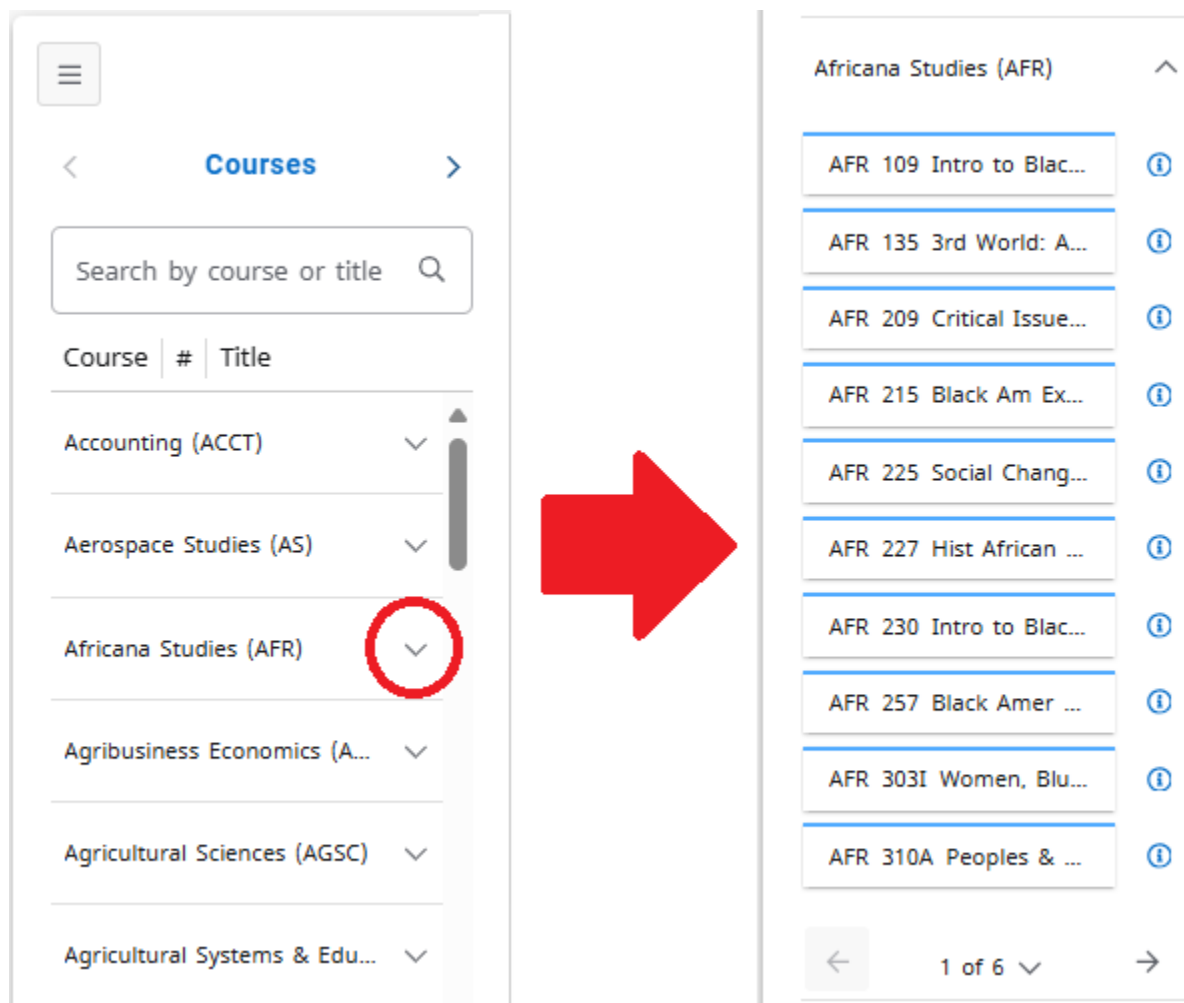The student's planned course sequence can be viewed or modified here:



1. **Audit** – This will check the student's completed, in-progress, and planned coursework against their degree audit to verify that the plan will successfully lead the student to graduation. The "Degree" in the plan header must match the degree audit that the plan will be checked against.
2. **Delete Plan** – Deletes the plan from the plan list. <u>This cannot be undone.</u>
3. **Save as Copy** – Duplicates the plan and saves an additional copy.
4. Expands or collapses the sidebar. The sidebar is expanded by default.
5. Current sidebar view. Use the arrows to scroll between options (see the next page).
6. Use these arrows to scroll left and right through terms.
7. **Add Term** – Add a term to the plan that is not already on it.
   - Terms may occasionally insert themselves out of order. If this happens, exit the plan by clicking "Plan List," and navigate back to the plan. The term should have re-assigned itself to the correct position.
8. Toggle fullscreen view.

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## Sidebar

Requirements can be added to the plan by dragging them from the sidebar and dropping them into the planner under the term that the requirement should be completed during. Three panels exist here – "Courses," "Requirements," and "Still Needed."

## Courses

This panel shows an alphabetic list of all subject codes for currently active courses at SIU. Click the arrow to the right of a subject to see a numeric list of all courses under that prefix. If more than 10 courses exist, use the arrows at the bottom to scroll through the available courses. Clicking the icon to the right of the course will bring up the "Course Information" screen. Using the "Search" box will filter the courses under each subject to only those that match the search criteria. When you have found the course that you are looking for, drag it from the sidebar and onto the term on the plan during which the student will be taking it.

**Requirements**

Here, requirement tiles can be added based on the type of requirement. These can be dragged from the sidebar and dropped onto the plan, or the blue "+" sign to the right of the requirement description can be clicked to brin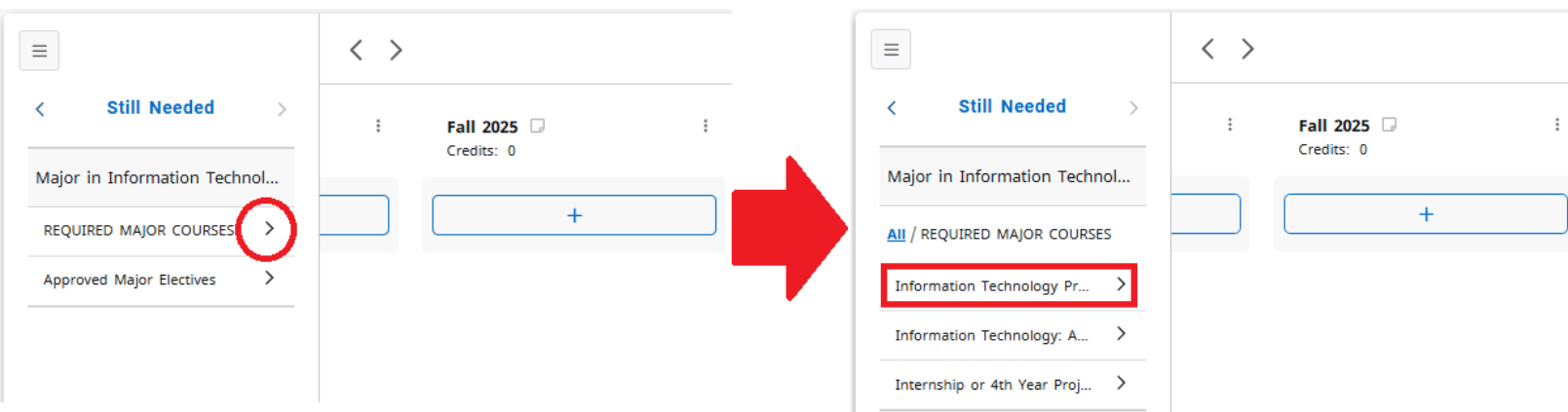g up the edit window for that requirement type. The only difference is that when dragging and dropping the "Term" field for that requirement will automatically populate, whereas the term needs to be entered manually if the requirement is added by clicking the "+" sign. More information about each requirement type can be found on pages 16-20.
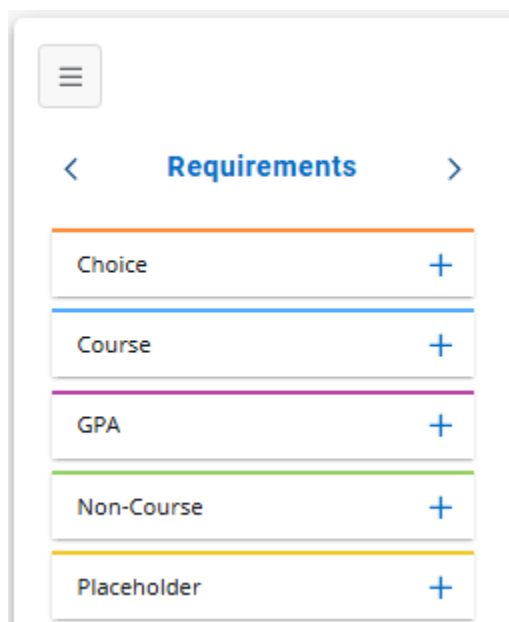


- Choice – For use when one of multiple courses can be used to fulfill a requirement and the student has not yet chosen a specific one.
- Course – Indicates that a particular course must be taken
- GPA – Tracks the student's overall GPA or sets a goal GPA based on a specific course list.
- Non-Course – For programs with non-course requirements, these can be added to the term during which the non-course will be added to the student's record.
- Placeholder – These can be used to add comments or notes about requirements in a manner that is more readily visible than the "notes" function, or to indicate large elective pools where adding every option to one choice tile would be overly tedious. Placeholders do **not** carry credit values and will not factor into the total planned credits.
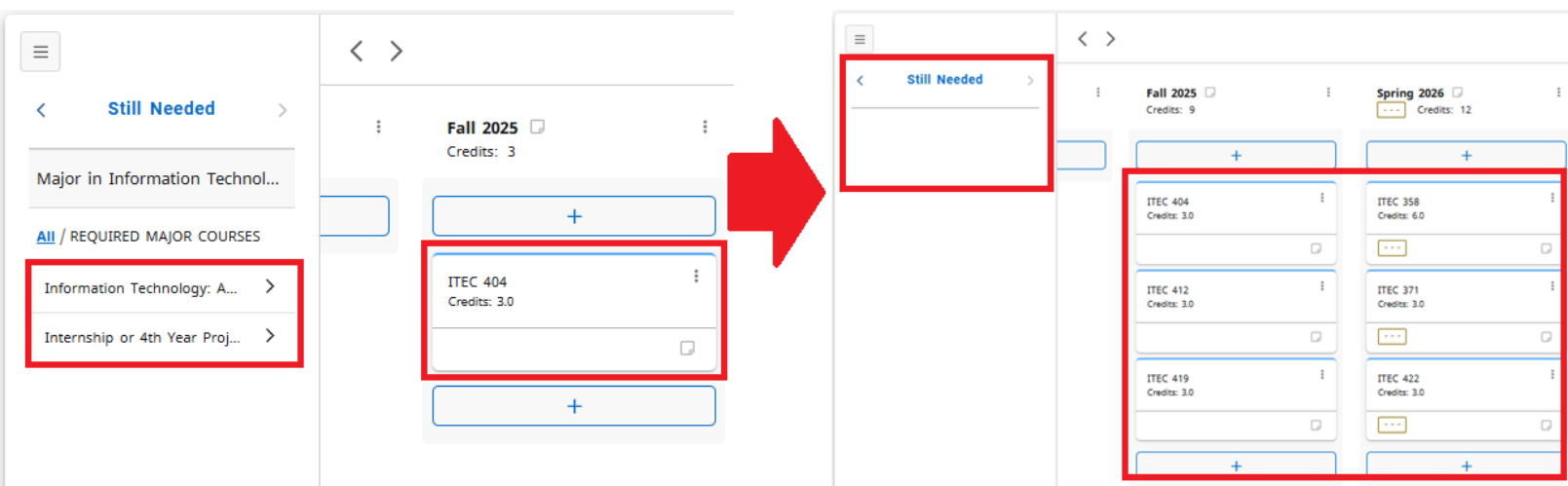
**Still Needed**

The "Still Needed" panel checks all planned requirements against the student's audit and shows only courses that still need to be completed using the same block, heading, and rule names from the audit. As more courses are added to the plan, the "Still Needed" panel detects that another requirement on the student's audit has been accounted for on the plan and removes that course from the "Still Needed" list.



Eventually this panel will be empty, indicating that all courses on the student's audit have either been completed or are accounted for on the plan.



This functionality makes the "Still Needed" panel especially useful for creating blank plans from scratch for students who are entering SIU with a large amount of transferrable credits.
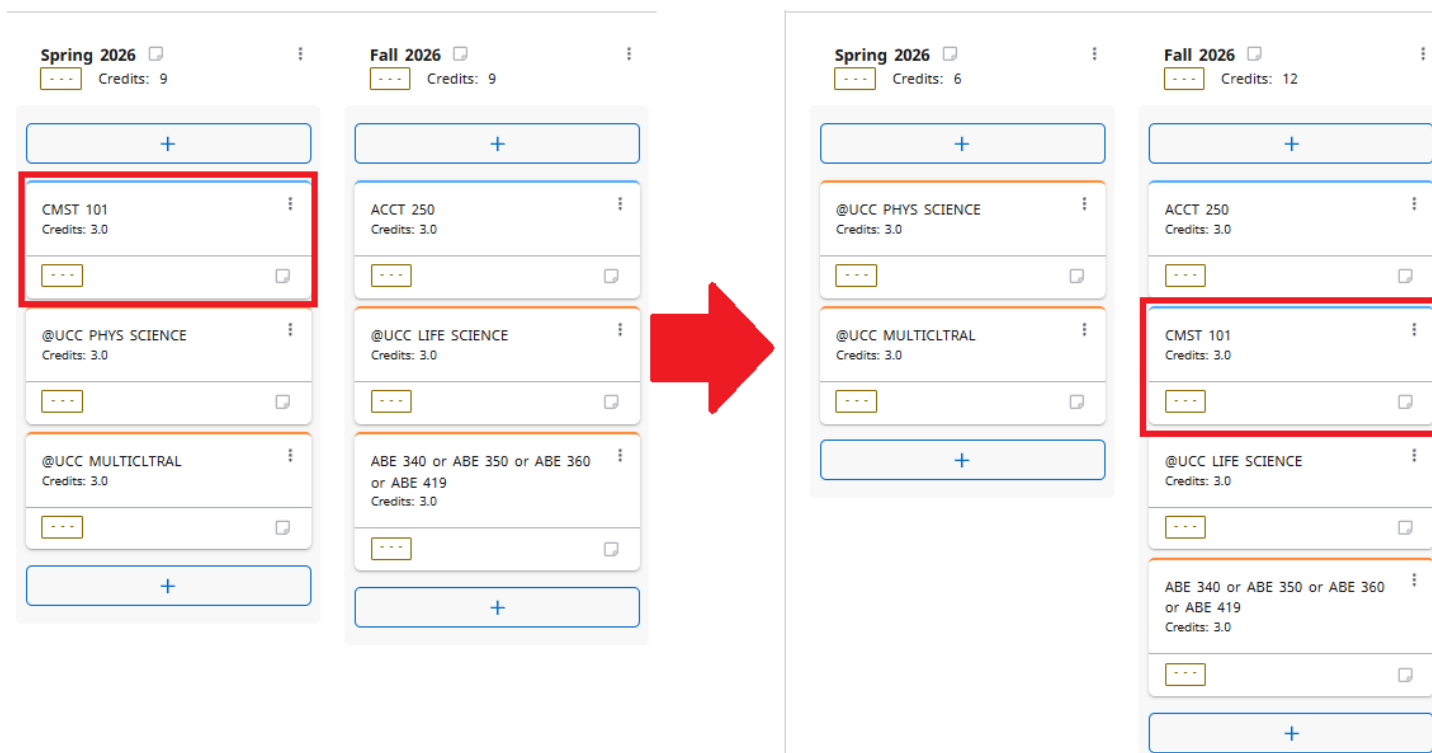
# Editing a Plan

Once a plan has been created for the student, additional changes may be needed. If the plan was assigned from a template, it may be necessary to move a few courses around to different terms or assign alternate options, and blank plans will initially have no requirements at all. All changes to SEP plans save to the database automatically – there is no "Save" button (except for when adding/editing individual requirements), and there is no "Undo" button. The "Save as Copy" button can be used to clone a plan before making extensive edits that may need to be reverted.

SEP does not allow for terms to be split into smaller units. If it is necessary to indicate that a course is only offered during a certain part-of-term (ex. first 8-week, second 8-week), a note can be added to the requirement tile for the corresponding course.

To add a requirement to a plan, drag and drop one from the sidebar or use the "Add Requirement" button as described on the next page. Requirements will sort themselves within a term by type from the top-down in this order: Course, GPA, Placeholder, Non-Course, Choice. When a requirement is moved from one term to another, it will insert itself below other requirements of the same type. Individual requirements of the same type can be re-ordered within a term by removing them from the term, then dragging them back in the order that they should be displayed from top to bottom.

To move a requirement from one term to another, simply drag and drop. A loading icon will appear briefly, then the requirement will have moved to the destination term.

Additional options exist for individual terms and requirement tiles:
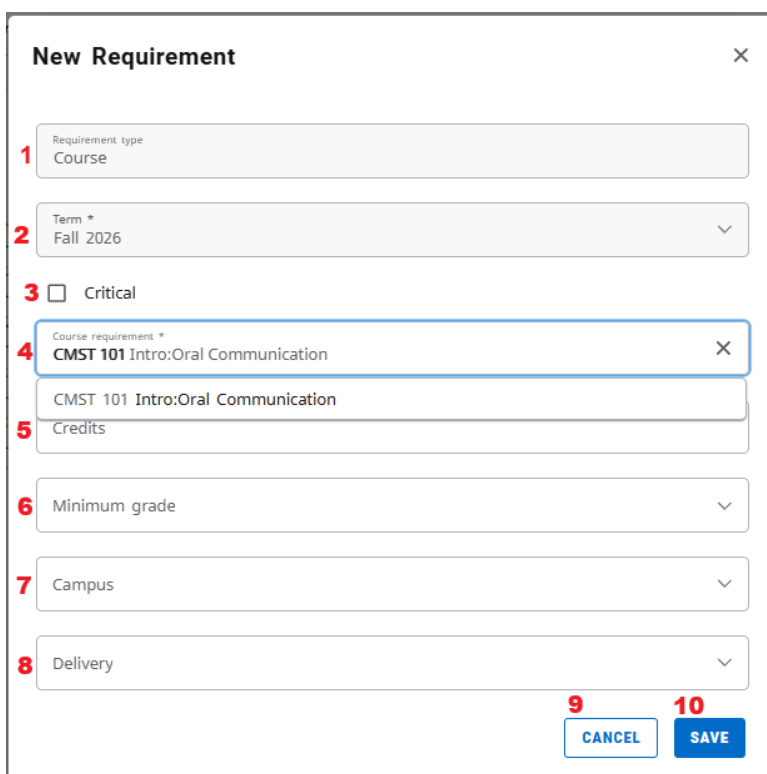


1. Add or view any notes that have been assigned at the term level.
2. Term information:
   - More Information – Shows the "Course Information" screen for all courses under that term. If a choice tile using a wildcard exists under the term, then all courses that fall under that wildcard will show here.
   - Delete this Term – Deletes the term and all courses under it.
   - Reassign this Term – Moves all coursework under the term to a different one.
3. Add Requirement – This will take you to an expanded view of the "Courses" sidebar, where courses can be searched alphabetically or by their "Still Needed" status. The checkboxes on the left side of this screen can be used to select multiple courses, which can be assigned en masse to the term using the "Add to Plan" button in the bottom right corner.
4. Requirement Options:
   - More Information – Shows the "Course Information" screen.
   - Edit this Requirement – Allows for changes to the requirement. Each requirement type has its own edit window, which are described on the following pages.
   - Reassign this requirement – Moves the requirement tile from one term to another as an alternative to the drag-and-drop method.
   - Delete this requirement – Deletes the requirement tile.
5. Add or view any notes that have been assigned to this requirement.

**Course**
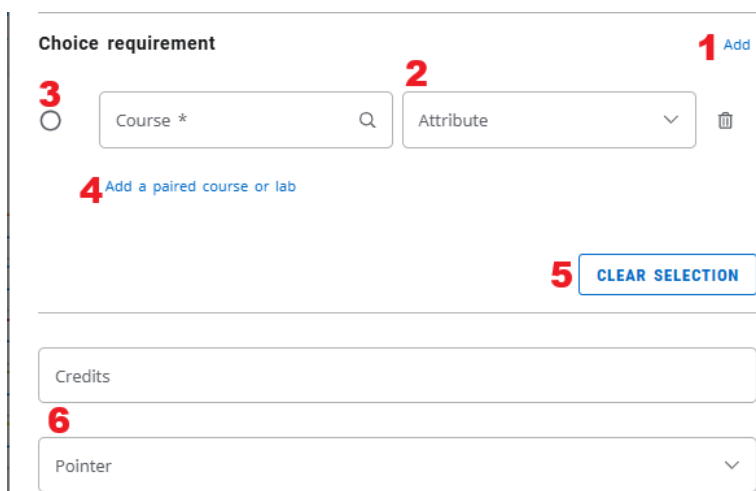


1. Requirement type. This field is locked.
2. Term – If you have dragged the Course tile onto a term, this should populate automatically. If you are adding it after clicking the blue "+" you will need to specify a term.
3. Critical indicator – This will cause the requirement to show "Off Track" if the student has not registered for the course in the specified term. This is useful for important prerequisites.
4. Course field – Enter the course number here. You must click on the course when it appears in the box below this field or the requirement will not save.
5. Credits – This will automatically populate based on the credits for the course as assigned in Banner. Courses that are variable-hour will default to the *high* value. This includes UNIV 101, which must always be changed to 1 credit when added to a plan.

   **The last three fields are optional:**

6. Minimum grade – If the course requires a minimum grade, enter it here.
7. Campus – If the student is taking classes at an alternate campus, this can be specified here.
8. Delivery – Enter the delivery modality here.

9. Cancel – Exit the window and discard any changes.
10. Save – Keep all changes and save this requirement to the specified term.

## Choice

Most of the fields are identical to course tiles, with a few additions:



1. Add – Will add an additional field for another course to be entered as an option on the choice.
2. Attribute – If the choice requirement is being used to indicate a UCC requirement in which the student has not yet selected a course, the attribute for the UCC area can be selected here. This field is optional.
3. Selection Bubble – Once the student has selected which course out of the available options they want to take, this bubble should be checked. The selected course will populate on the planner audit.
4. Add a Paired Course or Lab – If a course on a choice tile has a corequisite (such as separate lecture/lab science courses), click here. Enter the corequisite course in the new field that appears.
5. Clear Selection – Use this to un-check the selection bubble.
6. Pointer – Allows a UCC pointer to be assigned to the tile. The pointer will populate on the respective UCC requirement on the planner audit if a selection has not been made.
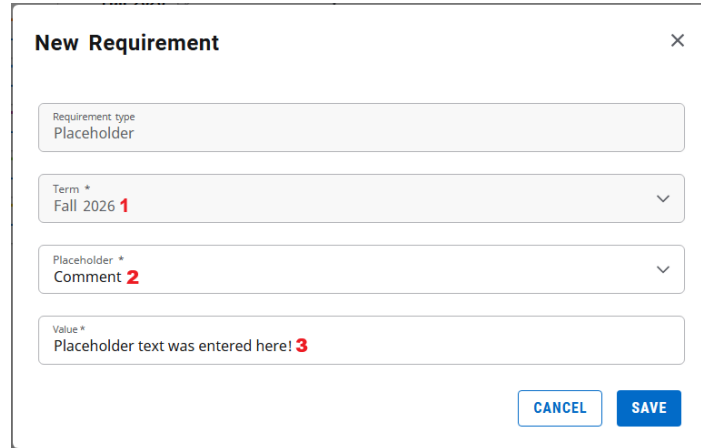
The "Credits" field will not automatically populate since course options on a choice tile may have varying amounts of credits.

Choice requirements also support the use of the @ sign as a "wildcard." Examples below:
- GEOL @ - Any course with the GEOL prefix.
- FOR 3@ - Any course with the FOR prefix at the 300 level.
- @ 4@ - Any 400 level course.
- @ @ - Any course.

The wildcard can also be used to add custom text to a choice requirement by placing it at the front, as seen with the "@UCC" choice tiles on most 4-year templates. While these requirements will not be considered "On Track" in this configuration, this serves as an alternative to Placeholder tiles in that credit hours can be assigned and up to 13 additional characters can be used to indicate an elective pool or certain category of courses.

**Placeholder**
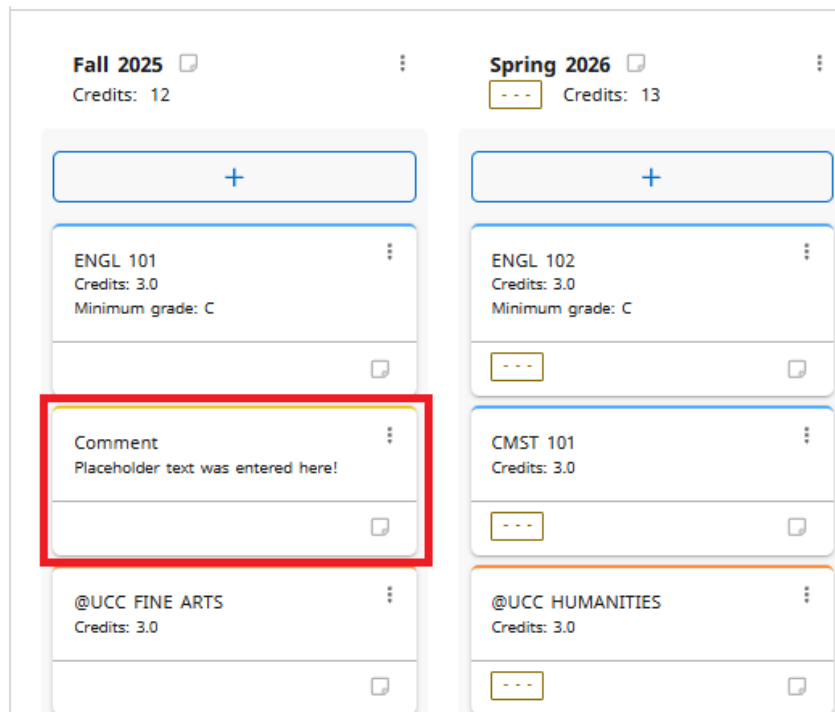


1. Term – The term that the placeholder has been assigned to.
2. Placeholder type – At this time the only option is "Comment."
3. Value – Enter your custom text here before clicking "Save."



Placeholder tiles do not count toward the term or plan credit totals, do not satisfy requirements on the planner audit, nor are they considered in tracking status. If a placeholder has been used to indicate a credit-bearing requirement, the placeholder tile should be replaced with a course tile once the student has registered for an applicable course.

**GPA**



1. GPA Type – Select from two options:
    i. Class List GPA – Specify a GPA to be earned across a specific list of courses during that term. In the "Class List" field that displays, courses must be entered as the subject code, followed by a space, followed by the number. Use the "+" sign between subsequent courses. Spaces around the "+" are optional. Example below:



    ii. Overall GPA - DegreeWorks – Specify an overall GPA to be earned by the end of the term.
2. Minimum GPA – Enter the goal GPA here. Up to three decimal places may be used.

**Non-Course**



1. Noncourse – Select the non-course to be posted to the student's record during the term.
2. Status – Enter the status of the non-course.

# Tracking Status

Students may have one plan per degree that is both active *and* locked. The contents of plans in this configuration are checked against the student's completed and in-progress coursework to verify whether the student is completing the planned requirements. The status of the plan is then assessed as "On Track" or "Off Track."

Tracking status for a given term is assessed starting on the first day of classes for that term. Requirements in future terms will not have a tracking status. If a student makes a change to their registration during the day, a superficial change must be made to the plan (ex. dragging a requirement tile from one term to another, and then back) to force the tracking status to refresh. A nightly script also reassesses tracking status and updates it as needed.

### Requirement-Level Tracking
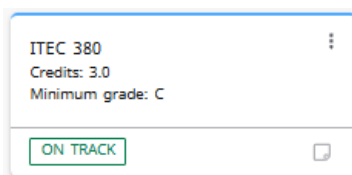


Individual requirement tiles have three different tracking statuses:

**On Track** – The student has enrolled in or completed the course. With our current configurations, the course may be taken in a different term than the term it has been assigned to and will still show "On Track." Credit values are not considered; only the student's status as having registered for the course.
**Warning** – The student has not yet enrolled in or completed the course.
**Off Track** – The student has not enrolled in or completed the course, and the requirement tile has been marked "Critical."

Tracking of **course** requirements is straightforward – the status displayed is indicative of whether the student has or has not registered for the course.
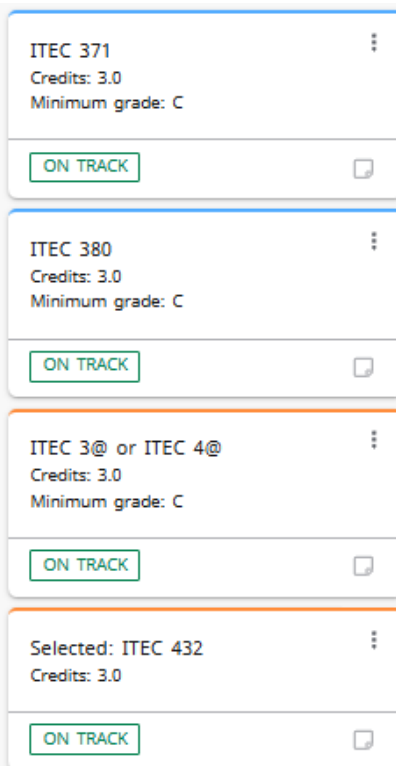
**Choice** requirements use the same three statuses, but have additional considerations due to their elective-based nature:
- A student needs only to have registered for one of the requirements on the choice tile for the tile to show "On Track." If a selection has been made on the choice tile and the student has registered for a different course on the choice tile than the selected course, the requirement will still show "On Track" because the registered course is still an option on the choice tile. The below choice tile has "ITEC 371 or ITEC 432" as options, but the student has only registered for 371:
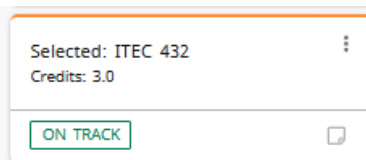


- Requirements written using the @ wildcard will show "On Track" as long as the student has registered for one course that falls under that range.

- Requirement tiles do not validate against one another to ensure that a registered course is only counted once. The below student has only registered for ITEC 371 and 380, totaling 6 credits. Since both courses fall under the "ITEC 3@" range, the third choice tile is "On Track," and because ITEC 371 is an unselected option on the fourth choice tile, it is also "On Track":



- The "@UCC" choice tiles pre-populated on most 4-year templates will never be "On Track" in their current configuration because no such numbered course exists; the intent is for these requirements to be updated or replaced with a course tile indicating the course from that UCC area that the student has ultimately decided to take.



**GPA** requirement tiles will show "On Track" in the current term because courses during that term are not yet counted in the GPA. Once the term containing the GPA tile has had final grades posted, the tracking status of the GPA tile will update accordingly.

In our current configuration, **Non-Course** tiles will always show "On Track."

**Placeholder** requirements are not assessed for tracking.

## Term-Level Tracking

Tracking status is also assessed for each term. If all requirement tiles under a specific term are "On Track," the term itself will also be "On Track." If one or more tiles have a status of "Warning" or "Off Track," the term will be "Off Track." A "Warning" status does not exist at the term and plan levels.
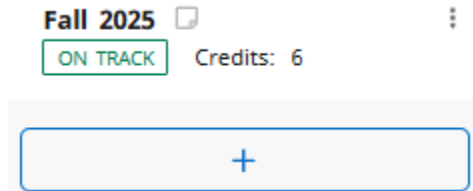


## Plan-Level Tracking

A plan's status as "On Track" or "Off Track" can be monitored on certain Argos reports. Similar to term-level tracking, if only one term on the plan is "Off Track" the effect will cascade upwards and result in the plan itself being considered "Off Track."
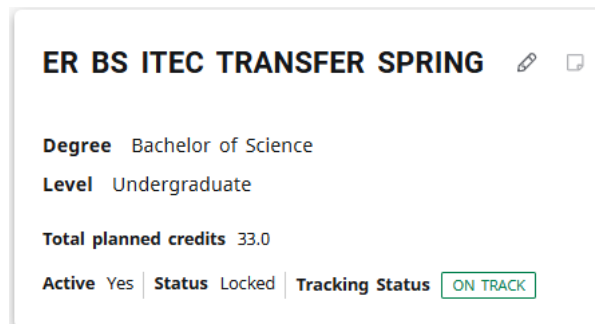
# Planner Audit

A student's planned requirements can be checked against their degree audit to verify that the plan will lead the student to graduation. All the student's completed, in-progress, and registered coursework is combined with future course and choice requirements from the plan, and a standalone audit is generated which shows how the combined coursework will satisfy the student's audit requirements. A planner audit showing 100% of the requirements complete indicates that the student will complete their degree if they adhere to the contents of the plan.

Elective wildcards (i.e. any choice tile using the "@" sign), pseudo-courses (GENL 1XX), and choice requirements which have not yet had a selection made will not populate on the planner audit. If any of these exist on the plan, be sure to verify that they match any incomplete requirements on the planner audit.

Completed, in-progress and registered coursework on the planner audit will show either (REG) or the final grade for the course, while requirements which have been applied from the plan will show a grade of (PLAN), as well as the planned term for that requirement:

| | | | | |
|---|---|---|---|---|
| ITEC 314 | Ethical & Legal Issues in IT | A | 3 | Spring 2025 |
| ITEC 370 | Database Design & Prog | A | 3 | Spring 2025 |
| ITEC 380 | User Experience Design | REG | (3) | Fall 2025 |
| ITEC 390 | Career Dev for IT Professional | A | 3 | Spring 2025 |
| ITEC 404 | IT Project Management | PLAN | (3) | Spring 2026 |
| ITEC 412 | IT: Analysis, Design, Impl | PLAN | (3) | Spring 2026 |

UCC choice requirements on templates have been pre-populated with a "pointer." The pointer allows these choice requirements to populate on the planner audit under their respective UCC requirement without a selection having been made:

| | | | | |
|---|---|---|---|---|
| ELED 220 | Math Cont & Mth Elem School II | PLAN | (3) | Spring 2026 |
| SEPPOINTER UCC-FINEARTS | Requirement planned but choice not selected | PLAN | (3) | Fall 2026 |
| BIOL 202 | Human Genetics & Health | REG | (2) | Fall 2025 |
| SEPPOINTER UCC-HUM | Requirement planned but choice not selected | PLAN | (3) | Fall 2026 |
| SEPPOINTER UCC-HUM | Requirement planned but choice not selected | PLAN | (3) | Spring 2027 |
| SEPPOINTER UCC-SCIGRP1 | Requirement planned but choice not selected | PLAN | (3) | Fall 2026 |

# Additional Comments

- Actions taken in SEP do not affect the student's Banner record or degree audit. The planner's interaction with other systems is minimal:
  - o The "Courses" panel lists valid courses from Banner.
  - o The "Still Needed" panel reads incomplete courses from the audit.
  - o Individual requirement tiles are checked against the student's completed and in-progress coursework to assess tracking status.
  - o The planner audit is generated independent of the worksheet audit and is not saved to the database.
- The "Print" function from the Worksheets tab remains available at the top of the Plans tab, allowing for student plans to be printed or saved as a PDF, however the formatting is not conducive to the standard 8.5x11 page size. As an alternative, fullscreen view can be enabled, and screenshots of the plan can be taken for pasting into other documents.
- When in fullscreen view, the standard Windows zoom in/out commands can be used to better fit the plan to your screen size. Press and hold the "Ctrl" key and scroll up on your mouse to zoom in, or down to zoom out.