DEGREE WORKS USER'S GUIDE

University of Detroit Mercy

Office of the Registrar

degreeworks@udmercy.edu

DEGREE WORKS USER'S GUIDE – REGISTRAR EDITION

Degree Works is the University's degree audit (what classes to take) and course planning (when to take these classes) software. This guide will assist users in performing the basic functions associated with their role in the system. For additional resources related to Degree Works, including user documentation, updates, and frequently asked questions, please visit the University's Degree Works homepage at

DegreeWorks & Student Educational Planner: Advisor Resources

If you have questions about this guide or about Degree Works access, contact the Office of the Registrar at degreeworks@udmercy.edu.

SECTION 1: HOW TO USE THE DEGREE AUDIT

DEGREE AUDIT ACCESS LOCATIONS

STUDENTS

Location: my.udmercy.edu > Degree Progress Card > View Audit

Audits accessed from this location default to the audit of the logged-in student.

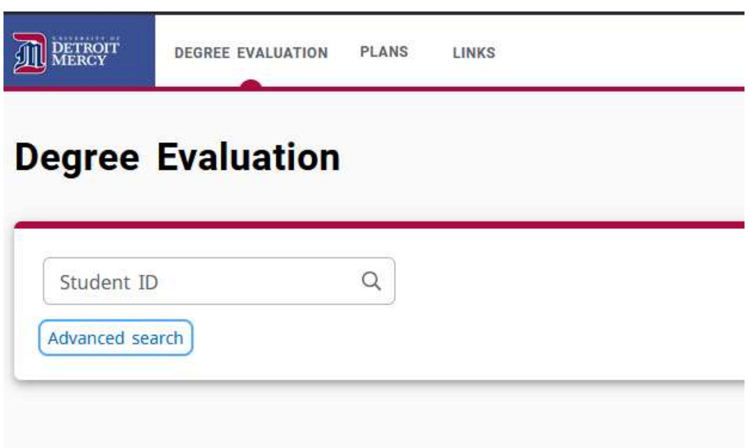
ADVISORS

Location: my.udmercy.edu > Self-Service - Faculty card > Advisor Access to Degree Works

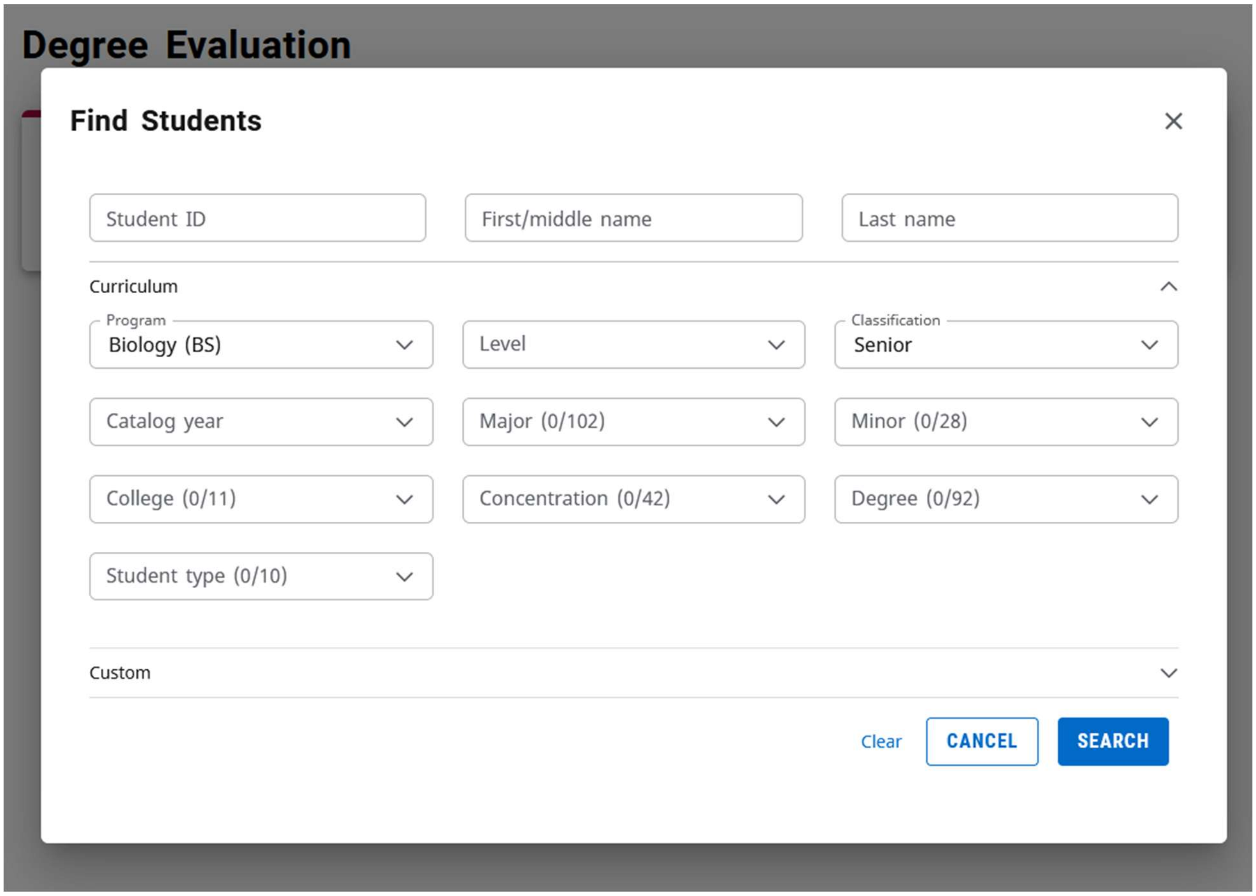
Audits accessed from this location open blank, so the advisor can search for a student.

DEGREE AUDIT OPENING NAVIGATION

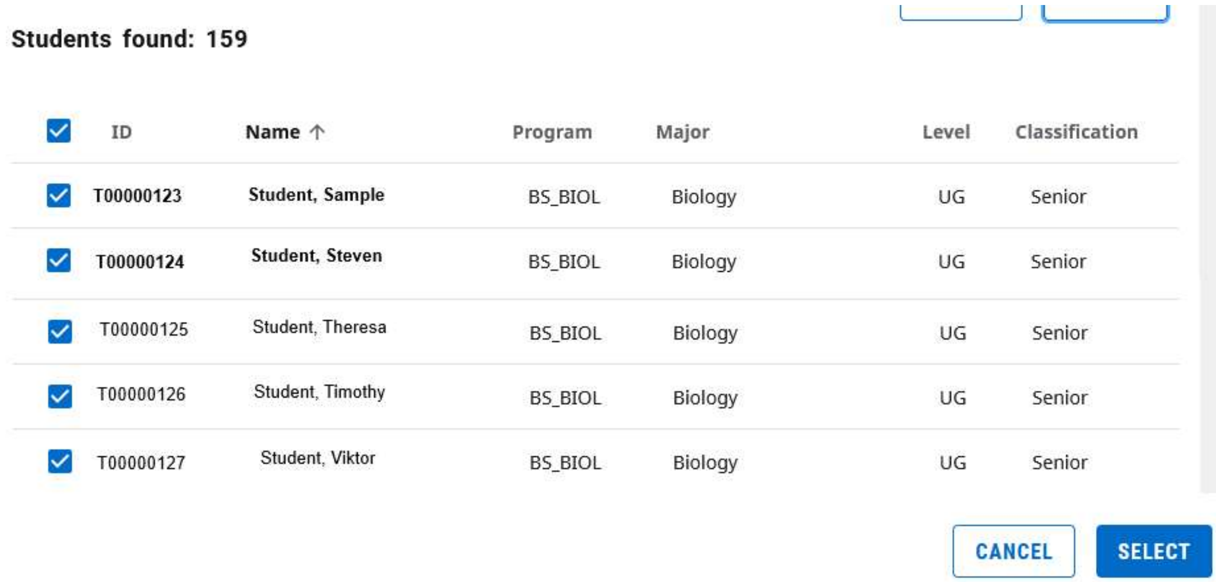
Students go directly to their own degree audit. Advisors will land on a Degree Audit screen where they can either enter the student's Student ID number directly into the Student ID box, or click the Advanced Search link below the Student ID box to search by criteria such as name, program, major, minor, college, degree, level, or classification.



In Advanced Search, click into a filter box, select the desired value(s), and scroll to the bottom of the Find Students box to click Search.

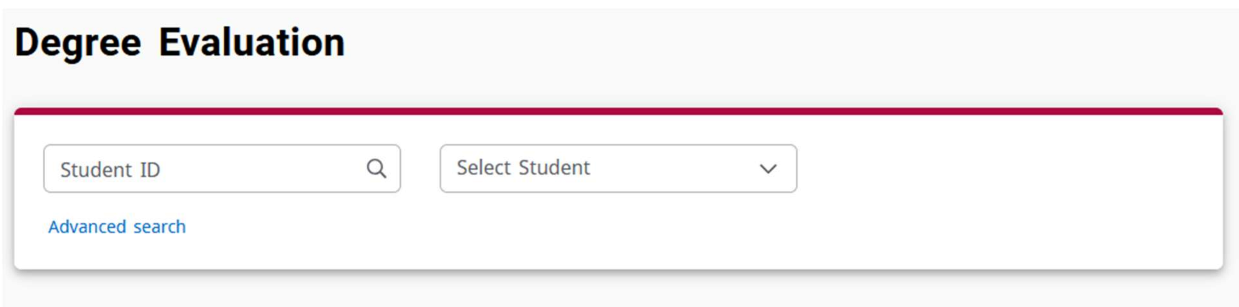


After clicking search, the list of students meeting the search parameters will appear. By default, all records are selected. You can choose to un-check options or click "Select" for all students to remain in drop down list.

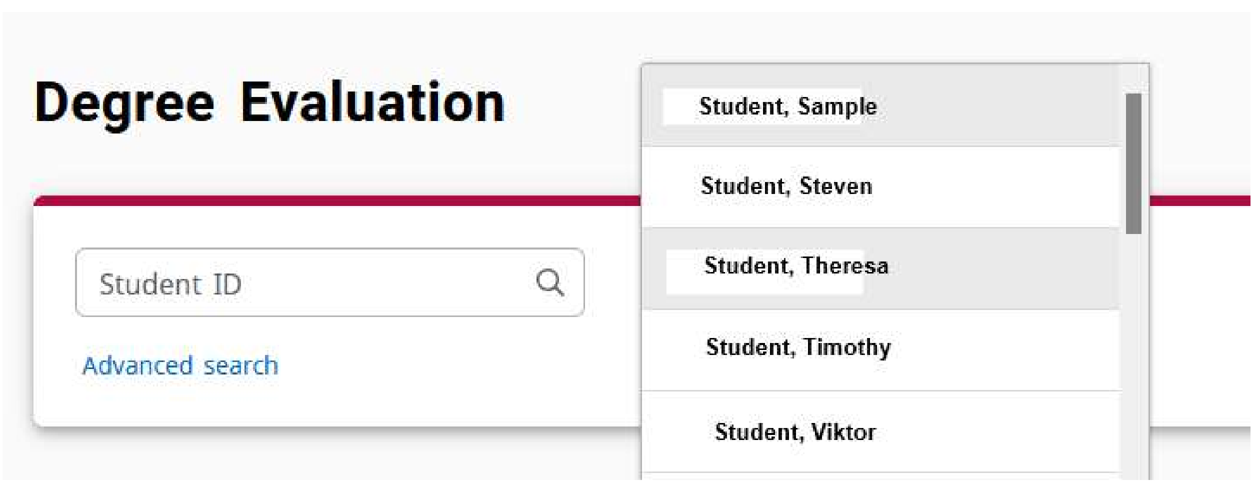


	ID	Name	Program	Major	Level	Classification
☑	T00000123	Student, Sample	BS_BIOL	Biology	UG	Senior
☑	T00000124	Student, Steven	BS_BIOL	Biology	UG	Senior
☑	T00000125	Student, Theresa	BS_BIOL	Biology	UG	Senior
☑	T00000126	Student, Timothy	BS_BIOL	Biology	UG	Senior
☑	T00000127	Student, Viktor	BS_BIOL	Biology	UG	Senior

Click in the “Select Student” box to bring up the list of names you selected:



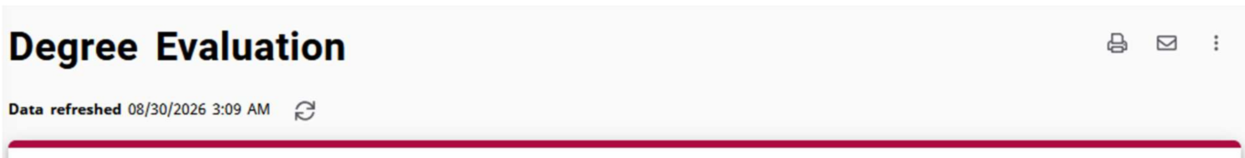
Click on the student’s name that you would like to review:



DEGREE AUDIT TOP AUDIT FUNCTIONALITY

The date and time the audit was last refreshed appears in the upper-left corner above the first block.

On the right side of the same row, you will find a printer icon, a contact (or email) icon, and an ellipsis icon.



PRINT ICON (PRINTING AN AUDIT / SAVING AN AUDIT AS PDF)

The printer icon lets you print or save the audit as a PDF. The most reliable way to print a degree audit is from PDF view. Click the printer icon to open the Choose Dimensions box. The default is Letter-Portrait (8.5 x 11 in.), though other sizes are available. Select the preferred dimensions and click Open PDF.

The PDF version of the audit has a slightly different layout than the on-screen version but shows the same requirements. To print, use your browser's print function from the PDF view and select a physical printer. To save the file, choose “Save as PDF” (or your browser's equivalent) instead of a physical printer, and save it to your desired location.

CONTACT (OR EMAIL) ICON

The contact icon lets a student email their academic advisor(s).

Registrar staff and advisor-level users can use it to email the student or the student's advisor(s). Clicking the icon opens a box showing the relevant contact information.

Note: The advisor information shown reflects the most current or future advisor record on file, which may not match the advisor assigned for the currently selected term if a later advisor change already exists in the system.

ELLIPSIS ICON

The ellipsis icon opens the student's class history — a chronological list of completed coursework, including term and cumulative GPA information. Unlike an official or unofficial transcript, it does not display repeat codes or full transcript-level GPA detail. It only shows coursework at the same level as the audit currently open (for example, only undergraduate coursework will display on an undergraduate audit).

INFORMATION BLOCK DISPLAY

The first block displays the student's Student ID number and name. The Degree drop-down lets you toggle between degrees or certificates if the student is pursuing more than one.

The block also shows the student's classification, degree, college, level, major, total overall credits and

Above the next block, you select the audit type you want to run. **Academic** is the primary audit. **What-If** is a prospective audit for a different program, covered in Section 2 of this guide. The Format drop-down lets you select the audit view: **Student View** is the default used by students and advisors, while Registrar Report additionally shows the Scribe programming behind the audit. Other views are rarely used.

To the right, a degree-progress wheel shows the percentage of requirement blocks the student has satisfied. The second wheel shows the percentage of credits towards the minimum required for the program.

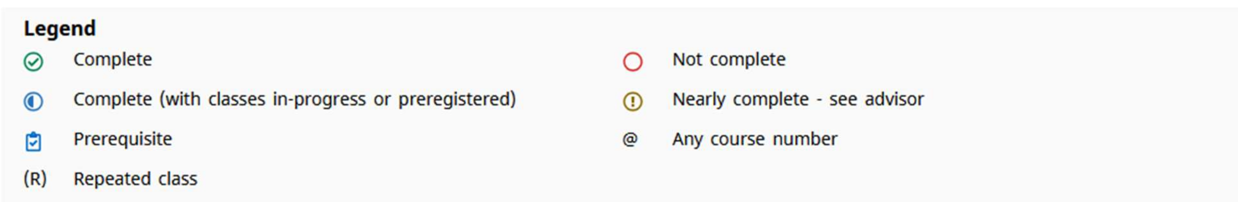
Further right are the in-progress (current term) and pre-registered (future term) checkboxes. These are checked by default but can be unchecked to run an audit that excludes those courses. The Process button runs a new audit using the current settings.

Just below the second block is the date and time of the current audit. The audit automatically runs when the audit is initially accessed, but if there are grade, registration, or test score changes in progress you can manually refresh using the Process button described above.

An additional menu appears below the audit date line: Diagnostics (shows Registrar staff the logic the auditor used to assign courses), Student Data (shows course characteristic data used by the audit), Save Audit (lets Registrar staff save a specific audit), and Delete Audit (lets Registrar staff delete a specific audit). These links are used infrequently.

DEGREE AUDIT LEGEND

The Degree Works symbol legend appears at the end of the degree audit. Because it applies throughout the audit, it is useful to review before working through the requirements:

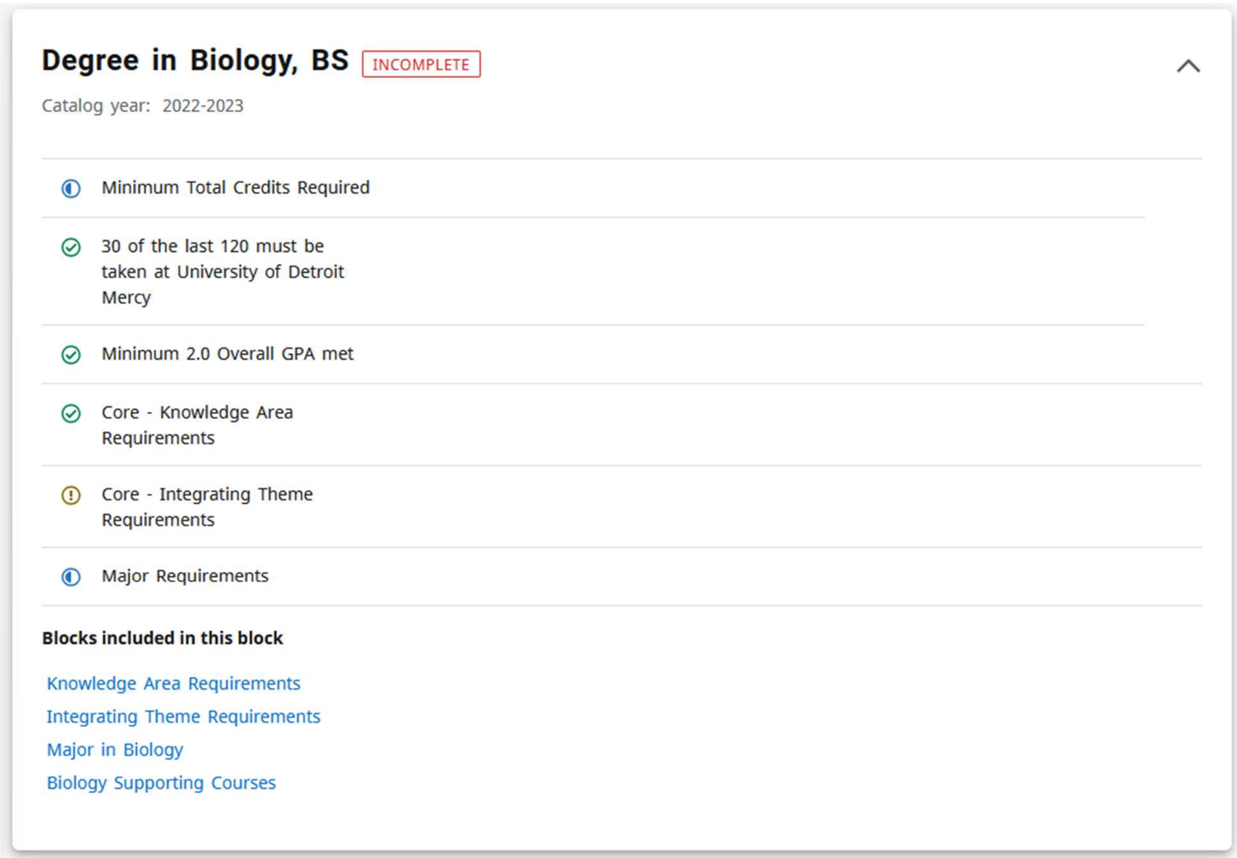


- Complete (green circle with a checkmark) – the requirement is met.
- Not complete (open red circle) – the requirement is not met.
- Complete except for classes in progress (half-filled blue circle) – the requirement is being met by current, future, or incomplete coursework.
- Unmet block or requirement rule (yellow circle with an exclamation mark) – the requirement is not satisfied and no specific course can resolve it (for example, a GPA rule or a minimum-credit threshold). This is most commonly seen in the core due to course re-use. Contact the Registrar's Office for assistance if you come across this.
- Any course number (@) – a wildcard representing any applicable course number. For example, “HIS @” means any HIS course.
- Repeated class (R) – appears in the Audited, Failed, Dropped, or Repeated sections for coursework excluded because it was repeated.
- Transfer grades are marked with a “T” in front of them. Transfer course listings also include the originating institution, course number, and course title.
- At the overall block level, the same four statuses appear as labeled boxes instead of circles: “Complete” (green), “In-Progress” (blue), “Incomplete” (red), and “Unmet block or requirement rule” (yellow).

DEGREE AUDIT BLOCK STRUCTURE AND TYPE

Each block displays the catalog year it is operating from just below the block title, and its completion status appears to the right of the block title as incomplete (red text), in-progress (blue text), complete (green text), or unmet rule (yellow text). The main block types are:

- Degree block – monitors everything needed to complete the degree, including general institutional requirements (minimum credit hours, residency, and any other University-wide graduation requirements) along with core curriculum, major, and minor requirements.
- Core curriculum blocks – found on undergraduate audits, the Knowledge Areas and Integrating Theme Requirements have their own blocks.
- Major, minor, or concentration blocks – monitor the respective program's specific requirements.
- Honors block (if applicable) – contains requirements for students participating in an honors program.
- General Elective Credits – two blocks could appear, one that states these credits are applied toward degree or one that shows it does not apply as it exceeds degree requirements.
- Classes Not Used – contains coursework that cannot count toward graduation, such withdrawn courses.



Each block also lists its specific requirements. For example, within a general education block, a requirement area might contain several sub-requirements, each shown with its own completion symbol. Once a student registers for a course that satisfies an in-progress sub-requirement, both that sub-requirement and its parent requirement update to “Complete except for classes in progress,” and then to “Complete” once the course is finished and passed.

DEGREE AUDIT COURSELINK

Clicking a hyperlinked course anywhere in the audit opens a panel showing the catalog description, and class schedule information, including the days/times sections are offered, the number of seats available, and campus/location information.

Course Information

PHY 1600 - 3 Credits - General Physics I

A rigorous course in mechanics, heat and thermodynamics, vibrations. This course is required for engineers and some science majors. This course is normally offered every fall and winter semester.

Attributes:

KAC1 IT2

Sections:

Term	CRN	Section	Seats open	Meeting times
Fall 2026	10530	01	5 (out of 20)	M W F 09:00am - 09:50am

DEGREE AUDIT TRANSFER EQUIVALENCY INFORMATION

If a student has transfer coursework, the audit shows how those courses were applied. Each transfer course displays the originating institution, course title, and course number below its UDM equivalency.

HIM 2050	Medical Terminology	TA	3	Fall 2024
	Satisfied by: AH100 - Medical Terminology - Henry Ford College			

DEGREE AUDIT EXCEPTIONS

Periodically, exceptions to program requirements are approved. These exceptions are submitted to the Office of the Registrar for processing.

Exceptions appear in two places on the audit: immediately below the requirement to which they were applied (showing who entered the exception, the date, and a description of the action), and in an Exceptions section at the end of the audit, which also shows whether the exception is currently “enforced” (working) or has been broken, most often because the student changed catalogs or programs.

Cybersecurity Risk Management	CIS 4850	IA Risk Management	TA	3	Fall 2024

Satisfied by: CIS2838 - System Security - Oakland Community College

Exception by: Office of the Registrar **On:** 08/28/2026 **Apply Here:** Apply CIS 4850 here

Exceptions

Type	Description	Created on	Created by	Block	Enforced
Apply Here	Apply CIS 4850 here	08/28/2026	Office of the Registrar	Major in Cybersecurity, BS	Yes

DEGREE AUDITS – LIMITATIONS DUE TO ADMINISTRATIVE PROCESS DEPENDENCE

The audit's ability to recognize that a student is repeating a course depends on the corresponding repeat code being applied in Banner. Repeat codes are not applied until the end of the semester during end of term processing. As a result, if a student passes a course while in the process of repeating it (for example, earning a "D" in a course and retaking it the following semester to improve the grade), both attempts could be used toward requirements until the repeat code is assigned and the earlier attempt is excluded. It is important to watch for this situation when advising a student.

DEGREE AUDIT LINKS

A Links section, typically located at the end of the header row, provides quick access to University resources relevant to students and advisors. Recommended links to include (with UDM-specific URLs):

- My Portal
- Advisor Management

SECTION 2: HOW TO USE THE WHAT-IF DEGREE AUDIT

A "what-if" degree audit shows what a student's audit would look like under a different program and/or catalog year, without formally changing their program.

Between the first and second block of the audit (below the ID block and above the format/degree-progress block), there is a control for selecting the audit type. Click What-If to open the What-If Analysis selection screen.

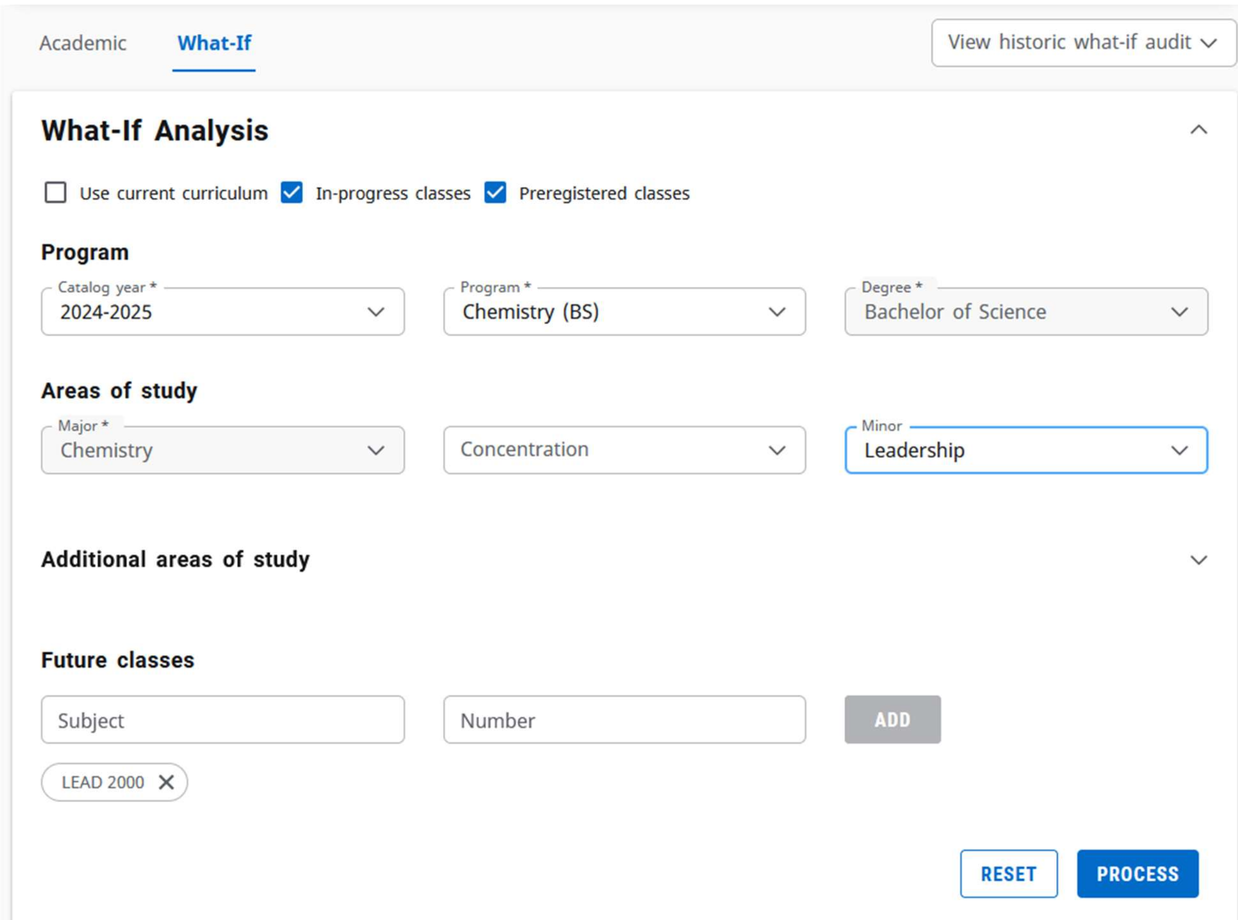
Select the catalog year, degree, and level to use for the what-if audit. The catalog year defaults to the student's catalog on record. Select the program (degree/certificate), the degree section will be filled in based on program chosen. In the Areas of Study section, select additional items such as concentration or minor.

Additional majors and/or minors can be added in the Additional Areas of Study section. Click the down arrow at the end of that row to reveal a plus-sign button; clicking it adds another major and minor field, filtered the same way as above. Click Add to save each additional selection, and repeat as needed.

The Future Classes section lets you add courses the student is considering taking, to see where they would apply. Enter the subject and course number, then click Add; the course will display as “Planned” in the what-if audit so its impact on requirements can be reviewed.

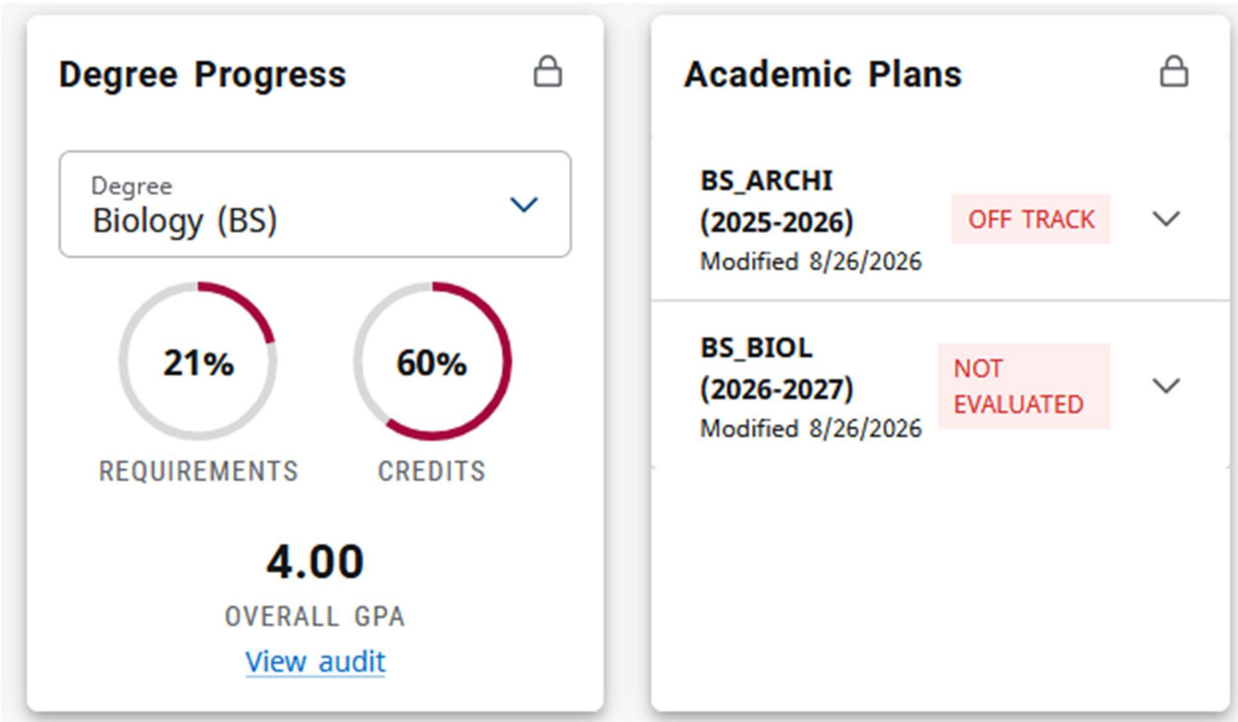
Future Classes can also be used with a student's regular (non-what-if) audit by checking “Use Current Curriculum” at the top of the What-If Analysis box (unchecked by default). This applies the student's currently declared majors/minors while still allowing use of the Future Classes feature.

The in-progress and pre-registered checkboxes, checked by default, control whether current-term and future-term registered coursework are included. Leave them checked in most cases. When finished, click Process to generate the what-if audit.



SECTION 3: HOW TO USE THE STUDENT EDUCATIONAL PLANNER (SEP)

The Student Educational Planner (SEP) is an online planning tool that lets a student (or an advisor on the student's behalf) build a term-by-term plan for completing degree requirements. Used alongside the degree audit, the SEP helps a student anticipate a realistic path to graduation. Access to the SEP is through the same link used to access the degree audit. Students have additional access to their plan(s) in their portal on the **Academic Plans** card.



SEP INITIAL PLAN CREATION FROM A TEMPLATE (PREFERRED METHOD)

Click the Plans link at the top of the degree audit. If the student has no existing plan, the plan area will be blank; click New Plan in the lower-right corner.

Choose whether to base the new plan on a template or start from scratch by clicking Select Template.

Select the first fall term to include. (If the student is starting in a spring or summer term, that can be addressed after the initial template is applied — selecting spring or summer as the starting term directly will produce an error message.) Search for and select the desired template; this will automatically build the plan framework.

Currently built plans were provided by the Colleges/Schools during our implementation. If you see an issue or would like to request a new template, please send an email to degreeworks@udmercy.edu including the courses by semester that a student should complete your program.

For students pursuing more than one degree, a Degree field will appear so the correct plan can be associated with the right degree; if the student has only one degree, this field will not appear. The initial plan is now ready for editing.

SEP INITIAL PLAN CREATION FROM SCRATCH

Click the Plans link at the top of the degree audit, then click New Plan. When prompted, click Blank Plan instead of selecting a template.

Select the first fall term to include and click Submit. In the Edit Plan box, rename the plan and click Save. The initial plan is now ready for editing.

SEP TERM EDITING

ADDING A TERM

Click Add Term in the upper-right portion of the SEP plan. In the Add Term box, select the next term to add and click Add. Repeat for each additional term needed.

DELETING A TERM

Click the ellipsis button to the right of the term to delete, then click “Delete this term.” Before confirming, make sure there is no planned coursework on that term that should be kept, since it will be deleted along with the term. Click Delete Term to confirm.

REASSIGNING A TERM

Click the ellipsis button to the right of the term to change, then click “Reassign this term.” Confirm that the new term does not already exist elsewhere in the plan (a plan cannot contain two of the same term), then click Reassign.

SEP REQUIREMENT TYPES

There are multiple ways to plan courses/requirements in SEP. Using the <   > buttons cycles you through options available. First is a list of subjects which allows you to find a specific course to drag and drop into to plan. Second is a requirements menu that allows additional options to add to the plan. Lastly, there is a Still Needed section which is incredibly helpful for current students.

COURSE

Used to add one specific course to the plan. The Course menu on the left has course subjects in alphabetical order. Click on a subject and then active courses in that subject appear. Drag and drop a specific course to a specific semester to plan it for that semester.

You can also add a course from the Requirements menu. By dragging and dropping the Course + to a semester in a plan, a menu will open which allows you to choose the course, credits, minimum grade, or delivery option of the course.

CHOICE

Used to add a requirement where the student will choose one option from several. Click the plus sign next to Choice to open a New Requirement box. Select the term and check Critical if applicable. In the Choice requirement box, begin typing to find and select the first option; click Add on the right side of the Choice requirement row to add each additional option. To require a pairing of two courses as a single choice (for example, “Course A, or both Course B and Course C”), use the “Add a paired course or lab” link below the relevant option.

For credits, enter the lowest credit value among the listed options. For minimum grade, follow the same guidance as the Course requirement type above. Click Save when finished. Once created, the student or advisor can check the specific option they plan to take so it displays in the plan and is used in the planner's audit.

PLACEHOLDER

Used when the general type of course or item is known, but the specific course is not yet decided — or to add a general reminder, advising note, or reference item. Placeholder types typically include:

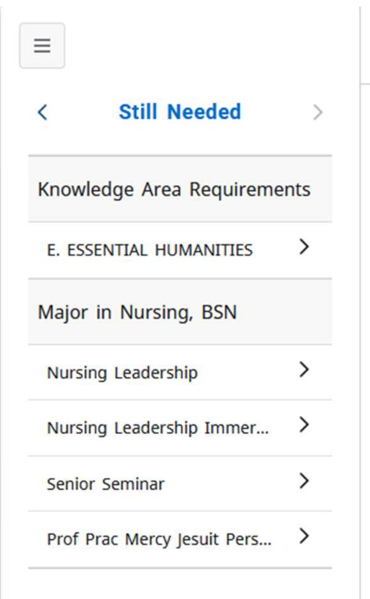
- Advisement – a reminder to discuss something specific with an advisor in a given term.
- Comment – a reminder about an activity to participate in during a given term (for example, a career fair).
- Elective – a placeholder for a general or free elective.
- Requirement Choice – a placeholder for a specific degree-audit requirement where the exact course is not yet chosen.
- Transfer – a placeholder to note that the student plans to take a course at another institution, useful for advisor awareness of the student's course load.
- Videos and Resources – a placeholder to save reference information (such as a link, pasted as plain text) for later use.

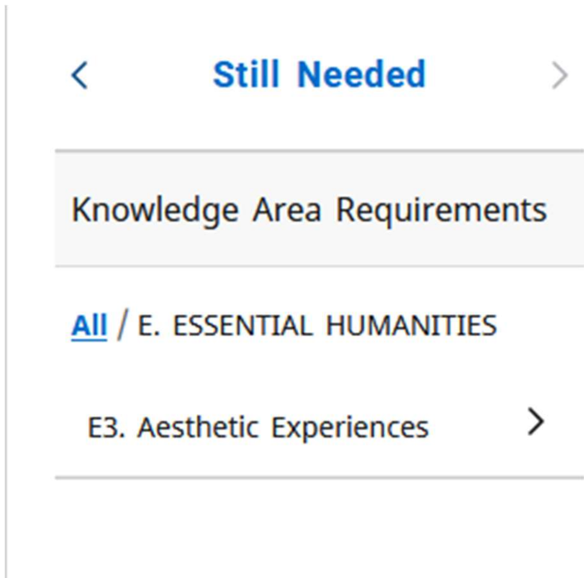
Click the plus sign next to Placeholder to open a New Requirement box with Requirement Type set to Placeholder. Select the term, then select the placeholder type. In the Value box, enter a short text description of the item (for example, “General elective (3 credits)”). It is recommended to always include the credit count in parentheses, since this requirement type does not have a separate credits field. Click Save when finished.

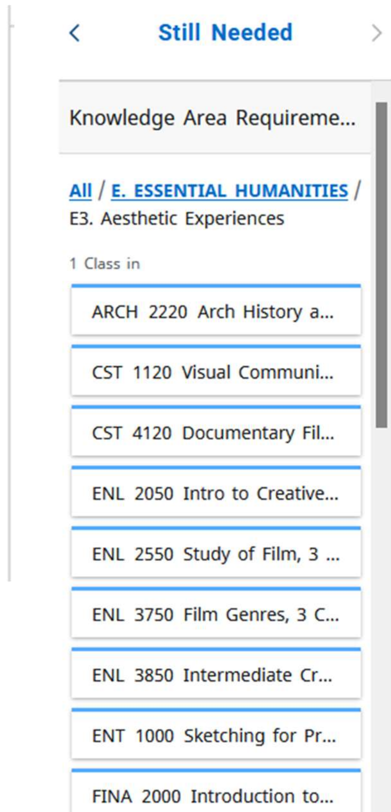
STILL NEEDED

For students who are currently enrolled and have academic history or transfer credits, this area lists blocks in the student’s degree audit that are still missing requirements. For example, for a nursing student going into their fourth year:

If you click on any of these options, the remaining requirements the student has not completed will show and allow you to drag and drop to the student’s plan.







SEP NAVIGATION AND EDITING

SEMESTER TRANSITION

Move between terms using the “<” and “>” arrows above the semester grid in the SEP plan.

COURSE EDITING OPTIONS

Click the ellipsis button next to any requirement to access the following options:

- Edit This Requirement – returns to the original entry screen so the requirement can be edited.
- Delete This Requirement – removes the requirement from the plan (with a confirmation step).
- Reassign This Requirement – moves the requirement to a different term; alternatively, a requirement can be dragged and dropped onto a different term.

Users can also add a note to any requirement by clicking the notepad icon in the lower-right corner of that requirement, typing the note text, and clicking Save Note.

SEP DEGREE AUDIT

Clicking the Planner Audit link above the SEP plan opens a degree audit reflecting the student's currently planned courses, in a separate window.

SEP PLAN ACTIVATION AND LOCKING

Once an initial plan is complete and ready for use, it should be activated. Click the pencil icon next to the plan title to open the Edit Plan box and check the Active checkbox. Students will see only the Active checkbox; advisors and Registrar staff will also see a Locked checkbox. Checking Locked indicates that an advisor has reviewed and approved the plan, after which the student cannot make further changes without contacting their advisor. Locking a plan also turns on plan tracking, which shows whether the student is on-track or off-track relative to their plan.

SEP PLAN DELETION

A plan can be deleted in either of two ways: clicking Delete Plan in the menu above the SEP plan, or clicking Plan List next to the plan title and then the trash-can icon next to the plan's entry. Either method opens a Delete Plan confirmation box; click Delete Plan to confirm. Once deleted, a plan cannot be recovered.