HOW TO ACCESS AND NAVIGATE AN ASSIGNED COURSE PLAN

TABLE OF CONTENTS

Revision History ......................................................................................................................................................................................... 1
Introduction and Purpose .......................................................................................................................................................................... 2
Related Policies, Regulations, Guiding Principles, and Common Practices ............................................................................................... 2
Impacted Departments, Units, Programs, and Centers ............................................................................................................................. 2
Procedures ................................................................................................................................................................................................. 2
Accessing Student Course Plans ......................................................................................................................................................... 2
Steps ............................................................................................................................................................................................ 2
Viewing Options .................................................................................................................................................................................. 4
Steps ............................................................................................................................................................................................ 4
How to Navigate the Calendar View ................................................................................................................................................... 4
How to Navigate the Notes View ........................................................................................................................................................ 7
How to Navigate the Edit View ......................................................................................................................................................... 11
How to Navigate the Audit View ...................................................................................................................................................... 12

REVISION HISTORY
INTRODUCTION AND PURPOSE

Course plans are available to provide students’ guidance towards completion of their degree requirements in a term based structure. This procedure document is intended to introduce students to Course Plans. This training will show students how to access and navigate through an already assigned Course Plan in the degree audit. They will be introduced to the different views available on the plan.

RELATED POLICIES, REGULATIONS, GUIDING PRINCIPLES, AND COMMON PRACTICES

1. Templates will be assigned to freshmen students prior to Orientation.
2. A student may modify and save an “active” plan.
3. A student may not modify and save a plan that has been “locked”. They may modify and save a copy of a plan that has been “locked”.

IMPACTED DEPARTMENTS, UNITS, PROGRAMS, AND CENTERS

1. Academic Departments
2. Students

PROCEDURES

ACCESSING STUDENT COURSE PLANS

STEPS

1. Once you have logged in to your degree audit, go to the Plans tab.

2. Your active plan will initially load with the default view. The default view is Calendar.
a. **Note:** All incoming freshmen should have a plan already assigned to them upon starting in the fall quarter. If you don’t see a plan assigned, please see your advisor.

3. If you do not have an active plan but do have at least one plan assigned, the **List of plans** will initially load when you click on the **Plans** tab.

4. If you do not have any plans assigned, a prompt will initially load when you click on the **Plans** tab. This prompt will ask if you would like to create a plan based on a template or start from scratch. Please see *How to Create a New Plan* for steps on both choices here.
VIEWING OPTIONS

STEPS

1. To access the different views, go to the View dropdown list located at the top right hand side of the Plans page.
   a. **Note**: A plan must be open or selected in order for you to access the View dropdown options.

2. A course plan has four viewing options: Calendar, Notes, Edit, and Audit.

3. **Calendar** view is the default view for an active plan. This view shows the course plan in a term-by-term calendar format that is suitable for printing. Edits cannot be performed in this view.

4. **Notes** view shows the course plan in a comprehensive format that is suitable for printing, with or without notes displaying. Edits cannot be performed in this format.

5. **Edit** view allows the user to make modifications to a course plan. There is no print option in this format.

6. **Audit** view shows the course plan and the planner audit side by side. **Note**: The planner audit is different from the audit in the Worksheets tab; the planner audit generates an audit against the selected course plan and planned requirements will appear on this audit. Minor edits can be performed in this format.

HOW TO NAVIGATE THE CALENDAR VIEW

1. First select the plan that you want to view by clicking on it once, it should be highlighted in blue.
2. Next select **Calendar** from the **View** drop-down list.

3. The plan will appear in calendar format. The header displays the title of the plan, degree, level, active status, and locked status. An active plan means this plan is current and in use. Note: there can only be one active plan. A locked plan means this has been reviewed and approved by an advisor and you cannot make changes. Only an advisor can lock a plan. Further, an active and locked plan will display in your Term Plan and Registration areas of R’Web.

4. The footer displays when the plan was last updated.
5. Planned courses and terms are displayed in the order of academic year (Fall, Spring, Summer, and Winter).

<table>
<thead>
<tr>
<th>2015-2016</th>
<th>Fall 2016, Total Units: 14.0</th>
<th>Winter 2016, Total Units: 13.0</th>
<th>Spring 2016, Total Units: 9.0</th>
</tr>
</thead>
<tbody>
<tr>
<td>BIOL 005B</td>
<td>4.0</td>
<td>CHEM 112A</td>
<td>CHEM 112B</td>
</tr>
<tr>
<td>CHEM 001C</td>
<td>4.0</td>
<td>BIOL 005C</td>
<td>PHYS 002C</td>
</tr>
<tr>
<td>CHEM 01LC</td>
<td>1.0</td>
<td>PHYS 002B</td>
<td>PHYS 02LC</td>
</tr>
<tr>
<td>PHYS 002A</td>
<td>4.0</td>
<td></td>
<td>Breadth</td>
</tr>
<tr>
<td>PHYS 02LA</td>
<td>1.0</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

6. Hovering over a course will reveal additional information about the course such as the course title and if there is a minimum grade requirement.

7. A print option is available in this view. To print, click on the print button located at the bottom right hand side of the page.
8. A new window will open showing the calendar view in print mode. Click on Print located at the top right hand side of the page.

**HOW TO NAVIGATE THE NOTES VIEW**

1. First select the **plan** that you want to view by clicking on it once, it should be highlighted in blue.
2. Next select **Notes** from the **View** drop-down list.

3. The Plan will appear in a comprehensive view-only format. The header displays the title of the plan, degree, level, active status, and locked status. The user will have the option of selecting to “Hide all notes” or “Show all notes”. The default mode is to “Show all notes”, but you will be able to toggle between the two modes.

a. When “Show all notes” is selected, the requirement notes display underneath the corresponding item, and will be included when printing.
b. When “Hide all notes” is selected, a note icon will display to the right of that item, but note text will not be included when printing. You may hover over the notes icon to see a preview of the note, or click on the note icon and open the Notes window.

4. The footer displays when the plan was last updated.
5. The footer also has buttons to generate a planner Audit or Print the view.

a. Clicking on the planner Audit button will pull up another window with the planner Audit. You may print this planner Audit by clicking on the Print option located on the top right hand side of the page.

b. Clicking on the Print button will pull up another window with the Notes view in print mode.
HOW TO NAVIGATE THE EDIT VIEW

1. First select the plan that you want to view by clicking on it once, it should be highlighted in blue.

2. Next select Edit from the View drop-down list.
3. The plan will display in edit mode and it contains the most data. The plan is broken down into rows, where each row represents a term and/or requirement. Please see How to Modify an Assigned Course Plan to learn how to make changes to a plan.

HOW TO NAVIGATE THE AUDIT VIEW

1. First select the plan that you want to view by clicking on it once, it should be highlighted in blue.
2. Next select Audit from the View drop-down list.

3. The Plan will display the Calendar view and Planner Audit side by side.

4. The Audit view allows you to do some editing of the plan. Courses can be dragged and dropped from the planner audit into the calendar view plan, as well as moved from one term to another on the calendar view plan.
   a. Note: The Audit view should only be used for light editing of the plan, and the Edit view should be used for advanced editing of the plan.

5. Only actual courses and Course requirements can be moved, course rules with wildcards (such as Math @@), ranges (such as Math 100:199) or attributes (such as BEET) cannot be moved from the audit to the plan, and Choice, Non-Course, Placeholder requirements cannot be moved from term to term on the plan.

6. To move a course in the Audit view, hover over the course, your cursor will change to a hand. Click on the course and drag it to the desired term and release. Click Refresh Audit to rerun the planner audit after making changes. Click Save when done to keep your changes.
<table>
<thead>
<tr>
<th>Course</th>
<th>Units</th>
</tr>
</thead>
<tbody>
<tr>
<td>BIOL</td>
<td>4.0</td>
</tr>
<tr>
<td>INTRO: ORGANISMAL BIOLOGY, Minimum Grade=C-</td>
<td>4.0</td>
</tr>
<tr>
<td>CHEM 01LC</td>
<td>1.0</td>
</tr>
<tr>
<td>PHYS 002A</td>
<td>4.0</td>
</tr>
<tr>
<td>PHYS 02LA</td>
<td>1.0</td>
</tr>
</tbody>
</table>

Navigate a Course Plan