

# HOW TO ACCESS AND NAVIGATE AN ASSIGNED COURSE PLAN

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## 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

Version	Date	Name	Description
1	08.02.16	Cindy	First Draft
2	09.22.16	Cindy	Second Draft

## 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

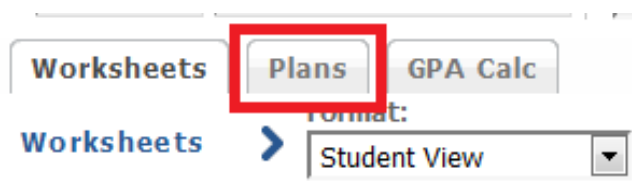
1. Academic Departments
2. Students

## 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.

Worksheets Plans GPA Calc

Student Planner for: **Microbiology - Math Placement 008A** View: Calendar View Plan List New Plan

**Microbiology - Math Placement 008A** Active: Yes  
Degree: Bachelor of Science Status: LOCKED  
Level: Undergraduate

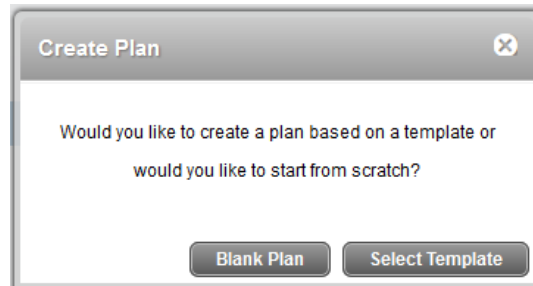
**2014-2015**

Fall 2014, Total Units: 9.0	Winter 2015, Total Units: 14.0	Spring 2015, Total Units: 14.0
ENGL 001A 4.0	ENGL 001B 4.0	MATH 009B 4.0
MATH 008A 5.0	CHEM 001A 4.0	CHEM 001B 4.0
Breadth	CHEM 01LA 1.0	CHEM 01LB 1.0
	MATH 008B 5.0	BIOL 005A 4.0
	Breadth	BIOL 05LA or BIOL 020 1.0
		Breadth

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.

Description:	Active	Modified	Who	Degree:	Level:	Status:
Biology - change in major	N	07/25/2016	Chavez, Cindy	BS	U	NOT LOCKED
Microbiology - Math Placement 008A	N	08/09/2016	Chavez, Cindy	BS	U	LOCKED
Microbiology from Scratch 16F_2yr	N	07/25/2016	Chavez, Cindy	BS	U	NOT LOCKED

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.



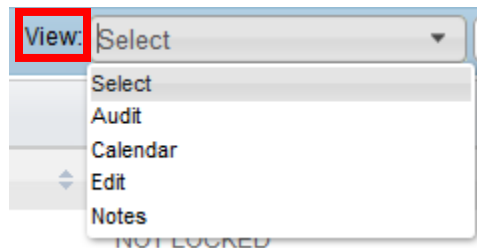

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## VIEWING OPTIONS

### STEPS

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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.

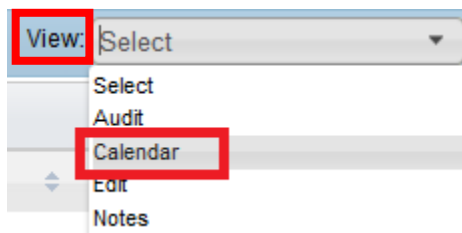
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## HOW TO NAVIGATE THE CALENDAR VIEW

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

Description:	Active	Modified	Who	Degree:	Level:	Status:
Biology - change in major	N	07/25/2016	Chavez, Cindy	BS	U	NOT LOCKED
<b>Microbiology - Math Placement 008A</b>	N	07/25/2016	Chavez, Cindy	BS	U	NOT LOCKED
Microbiology from Scratch 16F_2yr	N	07/25/2016	Chavez, Cindy	BS	U	NOT LOCKED

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.

**Microbiology - Math Placement 008A**

Degree: Bachelor of Science      Active: Yes

Level: Undergraduate                      Status: LOCKED









**2014-2015**

Fall 2014, Total Units: 9.0	Winter 2015, Total Units: 14.0	Spring 2015, Total Units: 14.0
ENGL 001A      4.0	ENGL 001B      4.0	MATH 009B      4.0
MATH 008A      5.0	CHEM 001A      4.0	CHEM 001B      4.0
Breadth	CHEM 01LA      1.0	CHEM 01LB      1.0
	MATH 008B      5.0	BIOL 005A      4.0
	Breadth	BIOL 05LA or BIOL 020      1.0
		Breadth





4. The footer displays when the plan was last updated.

Last updated by: on 09-Aug-2016

5. Planned courses and terms are displayed in the order of academic year (Fall, Spring, Summer, and Winter).

2015-2016		
<b>Fall 2015, Total Units: 14.0</b>	<b>Winter 2016, Total Units: 13.0</b>	<b>Spring 2016, Total Units: 9.0</b>
<a href="#">BIOL 005B</a> 4.0	<a href="#">CHEM 112A</a> 4.0	<a href="#">CHEM 112B</a> 4.0
<a href="#">CHEM 001C</a> 4.0 	<a href="#">BIOL 005C</a> 4.0	<a href="#">PHYS 002C</a> 4.0 
<a href="#">CHEM 01LC</a> 1.0 	<a href="#">PHYS 002B</a> 4.0 	<a href="#">PHYS 02LC</a> 1.0 
<a href="#">PHYS 002A</a> 4.0 	<a href="#">PHYS 02LB</a> 1.0 	Breadth
<a href="#">PHYS 02LA</a> 1.0 		

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.

Fall 2015, Total Units: 14.0		
<a href="#">BIOL 005B</a> 4.0		
INTRO: ORGANISMAL BIOLOGY, Minimum Grade=C-	4.0	
<a href="#">CHEM 01LC</a>	1.0	
<a href="#">PHYS 002A</a>	4.0	
<a href="#">PHYS 02LA</a>	1.0	

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.

ellucian.
Print

**Student Planner for:** XXXXXXXXXX

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**Microbiology - Math Placement 008A**

Degree: Bachelor of Science

Level: Undergraduate

Active: Yes

Status: LOCKED

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**2014-2015**

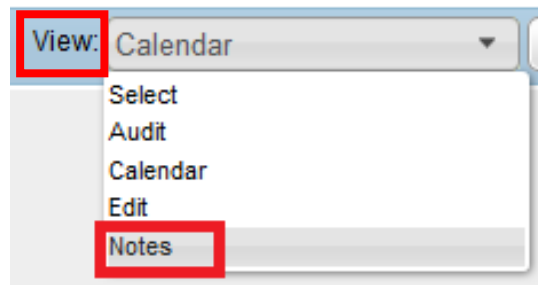
Fall 2014, Total Units: 9.0	Winter 2015, Total Units: 14.0	Spring 2015, Total Units: 14.0
ENGL 001A 4.0	ENGL 001B 4.0	MATH 009B 4.0
MATH 008A 5.0	CHEM 001A 4.0	CHEM 001B 4.0
Breadth	CHEM 01LA 1.0	CHEM 01LB 1.0
	MATH 008B 5.0	BIOL 005A 4.0
	Breadth	BIOL 05LA or BIOL 020 1.0
		Breadth

## 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.

List of plans							
Description:	Active	Modified	Who	Degree:	Level:	Status:	
Biology - change in major	N	07/25/2016	Chavez, Cindy	BS	U	NOT LOCKED	
<b>Microbiology - Math Placement 008A</b>	N	07/25/2016	Chavez, Cindy	BS	U	NOT LOCKED	
Microbiology from Scratch 16F_2yr	N	07/25/2016	Chavez, Cindy	BS	U	NOT LOCKED	

- Next select **Notes** from the **View** drop-down list.



- 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.

Microbiology - Math Placement 008A Active: Yes  
 Degree: Bachelor of Science Status: LOCKED  
 Level: Undergraduate

Hide all notes

Student must have at least 180 units at graduation.  
Chavez, Cindy | 2016-08-09 14:40:09



Course availability is based on historical data and subject to change.  
Chavez, Cindy | 2016-08-09 14:40:09

**Fall 2014, Total Units: 9.0**


Critical	Course Requirement	Minimum Grade	Credits	Notes
	<a href="#">ENGL 001A</a>	C	4.0	
	<a href="#">MATH 008A</a>	C-	5.0	
Critical	Placeholder Requirement	Value		Notes
	Breadth	BREADTH		

- When “Show all notes” is selected, the requirement notes display underneath the corresponding item, and will be included when printing.



Winter 2015, Total Units: 14.0				
Critical	Course Requirement	Minimum Grade	Credits	Notes
	<a href="#">ENGL 001B</a>	C	4.0	
	<a href="#">CHEM 001A</a>	C-	4.0	
	Concurrent enrollment is required in lecture and lab.			
	Chavez, Cindy   2016-08-09 14:40:09			
	<a href="#">CHEM 01LA</a>	C-	1.0	
	Concurrent enrollment is required in lecture and lab.			
	Chavez, Cindy   2016-08-09 14:40:09			

- 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.

Winter 2015, Total Units: 14.0				
Critical	Course Requirement	Minimum Grade	Credits	Notes
	<a href="#">ENGL 001B</a>	C	4.0	
	<a href="#">CHEM 001A</a>	C-	4.0	
	<a href="#">CHEM 01LA</a>	C-		
	<a href="#">MATH 008B</a>	C-		
Critical	Placeholder Requirement	Value		
	Breadth	BREADTH		

**Requirement notes attached: 1**

Concurrent enrollment is required ...

Notes attached to: CHEM001A		
Note	Author	Modified
Concurrent enrollment is required in lecture and lab.	Chavez, Cindy	2016-08-09 14:40:09

[Done](#)

4. The footer displays when the plan was last updated.

Last updated by: on 09-Aug-2016

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.

The screenshot shows a window titled "Plan Audit" for "UCR Degree Works Test". It displays a "New Planner Worksheet" for student W00000eE as of 07/28/2016 at 14:13. A "Print" button is highlighted in the top right corner. The student information is as follows:

Student	[REDACTED]	Level	Undergraduate
ID	[REDACTED]	Degree	Bachelor of Science
Classification	Junior	College	Natural and Agricultural Sci
Advisor		Major	Microbiology
Overall GPA	2.963	Minor	

Below this is a "Degree Progress" section with two progress bars:

Requirements	82%
Units	76%

At the bottom, it shows "Degree in Bachelor of Science" with "Catalog Year: 2014-2015", "Units Required: 180", "GPA: 2.963", and "Units Applied: 136.5". It also lists "Unmet conditions for this set of requirements: 180 units are required. You currently have 136.5, you still need 44.0 more units." and a list of met requirements with green checkmarks:

- ✓ You meet the minimum 2.0 GPA requirement.
- ✓ Systemwide ELWR Requirement
- ✓ American History Requirement -

- b. Clicking on the **Print** button will pull up another window with the **Notes** view in print mode.



Student Planner for: ██████████

**Microbiology - Math Placement 008A** 📄

Active: Yes  
 Degree: Bachelor of Science  
 Status: LOCKED  
 Level: Undergraduate

Student must have at least 180 units at graduation.

Chavez, Cindy | 2016-07-25 11:37:51

Course availability is based on historical data and subject to change.

Chavez, Cindy | 2016-07-25 11:37:51

**Fall 2014, Total Units: 9.0**

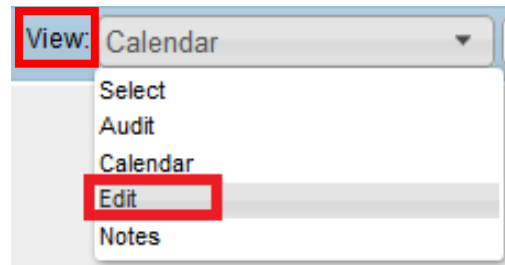
Critical	Course Requirement	Minimum Grade	Credits	Notes
	<a href="#">ENGL 001A</a>	C	4.0	
	<a href="#">MATH 008A</a>	C-	5.0	
Placeholder Requirement	Value			Notes
Breadth	BREADTH			

## 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.

Description:	Active	Modified	Who	Degree:	Level:	Status:
Biology - change in major	N	07/25/2016	Chavez, Cindy	BS	U	NOT LOCKED
<b>Microbiology - Math Placement 008A</b>	N	07/25/2016	Chavez, Cindy	BS	U	NOT LOCKED
Microbiology from Scratch 16F_2yr	N	07/25/2016	Chavez, Cindy	BS	U	NOT LOCKED

2. Next select **Edit** from the **View** drop-down list.



- 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.

Student Planner for: [REDACTED] View: Edit View Plan List New Plan

Description: Microbiology - Math Placement 008A  Active  Locked

Degree: Bachelor of Science Level: Undergraduate

**Fall 2014** Total Units: 9.0 Reassign Delete this term

Critical	Course Requirement	Units	Minimum Grade	Notes
<input type="checkbox"/>	ENGL 001A	4.0	C	
<input type="checkbox"/>	MATH 008A	5.0	C-	

**Placeholder Requirement** Value Notes

Breadth BREADTH

**Winter 2015** Total Units: 14.0 Reassign Delete this term

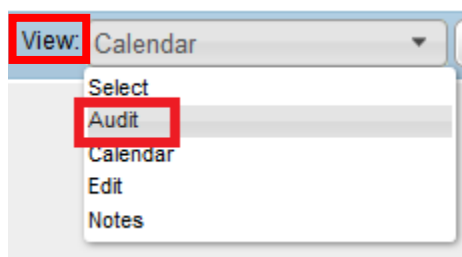
Critical	Course Requirement	Units	Minimum Grade	Notes
<input type="checkbox"/>	ENGL 001B	4.0	C	
<input type="checkbox"/>	CHEM 001A	4.0	C-	
<input type="checkbox"/>	CHEM 01LA	1.0	C-	
<input type="checkbox"/>	MATH 008B	5.0	C-	

## HOW TO NAVIGATE THE AUDIT VIEW

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

Description:	Active	Modified	Who	Degree:	Level:	Status:
Biology - change in major	N	07/25/2016	Chavez, Cindy	BS	U	NOT LOCKED
Microbiology - Math Placement 008A	N	07/25/2016	Chavez, Cindy	BS	U	NOT LOCKED
Microbiology from Scratch 16F_2yr	N	07/25/2016	Chavez, Cindy	BS	U	NOT LOCKED





2. Next select **Audit** from the **View** drop-down list.



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

The screenshot displays a course plan interface for 'Microbiology - Math Placement 008A'. On the left, a 'New Planner Worksheet' sidebar shows student details: Student ID, Level (Undergraduate), Degree (Bachelor of Science), Classification (Junior), College (Natural and Agricultural Sci), Advisor, Major (Microbiology), Overall GPA (2.963), and Minor. Below this is a 'Degree Progress' section with a bar chart showing 'Requirements' at 84% and another bar at 100%. A note states: '180 units are required for the degree, not to exceed 216 units. Still Needed: 180 units are required. You currently have 140.5, you still need 40.0 more units. A Minimum of 36 units must be completed at UCR'. The main area shows course requirements for '2014-2015' across three terms: Fall 2014 (Total Units: 9.0), Winter 2015 (Total Units: 14.0), and Spring 2015 (Total Units: 14.0). The courses listed are ENGL 001A (4.0), MATH 008A (5.0), ENGL 001B (4.0), CHEM 001A (4.0), CHEM 011A (1.0), MATH 008B (5.0), MATH 009B (4.0), CHEM 001B (4.0), CHEM 011B (1.0), BIOL 005A (4.0), and BIOL 05LA or BIOL 020 (1.0). The status is 'Active: Yes' and 'Status: LOCKED'.

- 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.
  - 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.
- 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.
- 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.

Fall 2015, Total Units: 14.0		
<a href="#">BIOL 0027</a>	4.0	
<a href="#">INTRO: ORGANISMAL BIOLOGY, Minimum Grade=C-</a>	4.0	
<a href="#">CHEM 01LC</a>	1.0	
<a href="#">PHYS 002A</a>	4.0	
<a href="#">PHYS 02LA</a>	1.0	

[Refresh Audit](#) [Print](#) [Save](#)