HOW TO CREATE A TERM PLAN IN R’WEB

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Students can create or edit registration plans by selecting Term Plan in Self-Service. Term Plan allows a student to organize their proposed class schedule. Term planning will be available when the Schedule of Classes (SOC) is available. Students have the flexibility to create 3 educational plans for any given term. Advisors or Faculty Advisors may create 3 additional plans beyond the 3 student created plans. Once the student reaches the maximum number of student created plans no additional student created plans can be created; the same applies to an Advisor or Faculty Advisor. Existing plans can be deleted and/or edited by their author. Plans created by another user can be viewed but not modified; i.e. only a student can edit a student created plan.

Term Plan does not check for course restrictions when plans are being created. Course restrictions include but are not limited to meeting the prerequisite, corequisites, major restrictions, etc. Restrictions will be verified in the Register for Classes path when students attempt to enroll in the courses of their plan.

Notes can be applied to a plan, a course, or section level in the plan summary. Notes can only be edited by the plan creator but they can be seen by any user who can view the plans (i.e. only the student can edit a note he/she created.)

Students designate one plan as the preferred plan. When a student creates one plan for a term, that plan is automatically identified as the preferred plan by default. The preferred plan is displayed at the top of the list of Term plans. Students cannot make a plan preferred when that plan was created for them by an Advisor. Advisors cannot make a student created plan a preferred plan. A degree audit plan cannot be designated as preferred. When three plans exist, and the preferred plan is deleted the user receives a message that another plan should be selected to be the preferred plan. The Advisor or Faculty Advisor can approve student created plans and the student can view which Advisor/Faculty Advisor approved it.

When 3 plans exist, and the preferred plan is deleted the user receives a message that another plan should be selected to be the preferred plan. If the student creates 2 plans and deletes the preferred plan, the remaining plan automatically becomes the preferred plan.

In R’Web there are courses that require enrollment in multiple activities (i.e. lecture and discussion) which are called Linked Activities. Linked activities are sections that have the same subject and course number; an example, HIST 010-001 (lecture) and HIST 010-022 (discussion). During registration, all sections must be added or dropped simultaneously for successful changes. Therefore, in Term Plan we recommend students add sections to their plans instead of courses because the course may not be offered for that specific term. Students can, however, add courses if they don’t want to decide on a day and time yet, but should be aware that if the course is linked to additional activities (i.e. discussion, lab, etc.) it will read 0 units until a section is selected.

In R’Web Corequisites are courses that have two different subjects and course numbers; for example, CHEM 001A-001 (lecture) and CHEM 01LA-002 (lab). During registration, both corequisite sections must be added or dropped simultaneously for successful changes.
Registration dates and times in R’Web are referred to as Time Tickets. At time of registration, students can conveniently reference and add sections to their enrollment from their plans when their time ticket arrives.

This document will demonstrate how to create a plan in R’Web.

**PROCEDURES**

2. Enter your UCR NetID and password.
3. Select Registration in the Applications window.

4. Select Term Plan.

5. Select the Term and press Continue.
6. You will arrive to the Plans you have created for this term page.
   a. Students will be able to create 3 plans.
   b. A message will appear if a Degree Audit Plan is available.

7. Select Create a New Plan or View the Degree Audit Plan.
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8. Term Plan opens up where he/she can either Find Classes to create a plan or view their Degree Audit Plan.
a. To Find Classes to create a plan please move forward to **Step 9**.

b. To view the Degree Audit Plan select the **Degree Audit Plans** tab.

**Note:** The Degree Audit Plan will display courses that have been planned for the term and specify the Advisor who assigned it. Degree Audit plans cannot be edited here but classes may be added to create a Term Plan from it. Please continue to step #12.

9. **To Find Classes to Create a Plan**
   
a. You will arrive to **Enter Your Search Criteria** to search for sections to add to your plan. This page allows you to search for sections by subject and course number, subject, course number, keyword, level, title, General Education Requirements, and by department.

b. The **Advanced Search** selection allows students to search for classes with additional information such as course number range, college, schedule type, unit range, and additional keywords.
10. As you begin your search, possible matches will list as the information is entered in the fields.
11. More than one entry can be entered in each field.
   a. Enter your search criteria in any of the fields and press **Search**.

![Image of search interface](image.png)

12. The **Search Results** page has three panels. The panels can be minimized or maximized by selecting the toggle arrows or reset back to default by selecting the reset button (the dot).

   a. **Search Results**: Top panel allows you to view search results in a list format.
   b. **Schedule (Calendar)**: Provides a visual of how planned sections apply to a student’s hourly, daily, and weekly schedule. Sections will be differentiated with color blocks allowing the student to view the number of times the section meets throughout the week and it allows the student to easily identify if a section conflicts with another planned course. **Please note**: if a course is selected instead of a section this feature will not be available since the course will not have the meeting times listed.
   c. **Term Plan panel**: Will list planned sections; this is very similar to a shopping cart meaning they are not yet part of the plan until the Status changes to Planned. Notes can be added near the plan title and also to sections in the plan. The user will add a title when **Save Plan** is selected.
13. The Search Results will show courses that match the search criteria and will organize them by **Subject, Subject Description, Course Number, Title, Units, Description, and by Action**. The order by which the results are organized can be rearranged.
   a. The user can drag and drop the columns.
   b. Or select the carrot at the top of any column which can sort the search results by each column.
   c. The **gear** icon gives the option to remove columns.
To expand or shrink a column the user can hover over the column until the double arrow is visible and drag the column to change its width.

14. When the schedule of classes is available for the upcoming quarter the user will be see both View Sections and Add Courses. Please visit our Academic Calendar online to view the date the schedule of classes is published at registrar.ucr.edu.

a. We recommend users select View Sections to view sections being offered for the upcoming quarter as not all courses are offered every quarter.

b. An advantage of adding specific sections to a plan is students can conveniently reference their plan when their registration period arrives and enroll into their sections (if space is available and no enrollment errors are encountered.)

c. If Add Course is selected the user will have to select a section that may have a linked activity at the time of registration or the user may discover the course is not being offered for the term at the time of registration.
addition, added courses that require enrollment in linked activities will list “0” units but when a section is selected the actual number of units will be added.

15. Select **View Sections**.

16. The **Search Results** will list sections in sequential order.
   a. If sections require enrollment in secondary activities there will be a **linked** icon visible.
   b. When the section is full and no additional seats are available a **FULL: 0 of 50 seats remain** will be visible.
   c. The example below lists lectures that can be paired with secondary activities. One of the discussions being offered is already full.
**Note:** When the scroll bar is active there are additional results that are not immediately visible. Scroll down to view additional results on additional pages or change the amount per page.

17. To view linked sections for a particular section, select **View Linked**. It is recommended to choose **View Linked** next to a lecture because it presents all viable combinations for the section.

18. In the example below, all the activities linked to the lecture section selected appear in groups because **View Linked** was selected on the lecture.
19. Navigate to the desired group of sections and select Add All. When Add All is selected it will automatically add all linked activities to the plan in the Summary panel.

20. The sections will be added to the Term Plan panel with a Pending status. The example below is temporarily titled Fall 2015 Untitled Plan.
**Note:** The calendar is an extremely helpful tool in that it will demonstrate when a section creates a time conflict with another planned section. Sections that have time conflicts can be added to a plan. The time conflict, however, will have to be resolved at time of registration by adjusting the classes in the schedule.
21. As mentioned earlier, notes can be added to the plan title and to sections in the plan.

![Image of a plan title with notes added]

22. Press **Save Plan**.

![Image of a plan with Save Plan button highlighted]

23. Name your plan and press **Save**.
24. Congratulations, you have successfully created a Term Plan if the status now says Planned.
   a. If notes were added the note icons will change from 📝 to ✅.

25. Repeat steps to add additional sections to the plan.
26. To remove a course from your plan select the drop down arrow and select Delete followed by Save Plan.
27. Return to Term Plan to view each plan you have created.
   a. In the example below, there are a total of three plans.
      i. Two plans created by the student. One is a student Preferred plan and another has been Approved by an Advisor.
      ii. One Degree Audit plan.
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Number of Degree Audit Plans: 1
Plan: Business Administration Created by: Chayut, Cindy