

# COURSE PLAN VIEWS

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## REVISION HISTORY

Version	Date	Name	Description
1	2.15.16	Bracken	final

## 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 illustrate the different view options available in Degree Works Course Plans and their uses.

## RELATED POLICIES, REGULATIONS, GUIDING PRINCIPLES, AND COMMON PRACTICES

1. All degree-seeking undergraduate students must have a four year course plan.

## IMPACTED DEPARTMENTS, UNITS, PROGRAMS, AND CENTERS

1. Registrar's Office
2. Academic Departments

## BEFORE YOU BEGIN

If this is the first time you are reviewing this procedure, open Degree Works (<https://degreeworkstest.ucr.edu/>) to follow along.

## FORMS

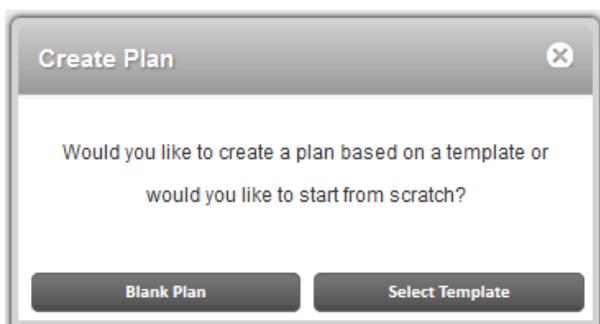
The degree audit is located within Degree Works. There are no forms in Degree Works.

## PROCEDURES

### COURSE PLAN VIEWS

#### INTRODUCTION

1. A student must have a plan assigned to them before accessing the viewing options.
2. If a student has an active plan, the active plan will show by default on the Plans tab. Typically, the plan's default view is the Compact view which will be explained in more detail below.
3. If a student does not have an active plan but does have at least one plan, the List of Plans will be the default view on the Plans tab.
4. If the student does not have any plans, a "Create Plan" prompt will appear. Please refer to the document on *How to Create a New Plan* for further instructions on creating a new plan.



5. A student's course plan has two viewing options: Compact and Edit.
  - a. The **Compact view** displays course data in a view-only calendar presentation that is suitable for printing. You cannot make modifications to the plan in this view.
  - b. The **Edit view** provides more specific details and is used when modifying plans. Printing is not available for this view.
  - c. The footer displays when the plan was last updated for both views.
6. **To select a plan** from the Plan List, highlight the plan you would like to load, then choose the preferred view from the drop-down menu.
  - a. **You may also double click** on the selected plan and it will open it in the default view which is the Compact.

Description:	Active	Modified	Who	Degree:	Level:	Status:
Economics	N	01/13/2016	chavez, cindy	BA	U	NOT LOCKED
Economics	Y	01/29/2016	Wotherspoon, Barbara A	BA	U	LOCKED
Economics/Admin	N	01/29/2016	Wotherspoon, Barbara A	BA	U	LOCKED

7. **An Active flag** indicates the plan is current and in use.
  - a. A student may modify and save a plan that is "active".
8. Once a plan is approved by an advisor, it can be placed into **Locked status**.
  - a. A Locked flag prevents the student from making changes to the plan and ensures the plan shows in the student's Term Plan and Registration areas of self-service. Only active and locked plans from Degree Works show in Banner self-service.

<b>Economics</b> Degree: Bachelor of Arts Level: Undergraduate	Active: Yes Status: LOCKED
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## CHECK YOUR UNDERSTANDING

1. The Active Plan defaults when the Plans tab is accessed.
  - a. TRUE
2. A student can make changes to a locked plan.
  - a. FALSE, a student may not make changes to a locked plan.
3. If a plan is locked, it will show in the student's self-service Term Plan and Registration.

- a. FALSE, a plan must be Active AND Locked to show in self-service.

**STEPS – ACCESSING THE COMPACT VIEW**

1. Under the Plans tab, select **Compact** from the **View** drop-down list.
2. Compact view shows the Course Plan in an Academic Calendar format. The planned terms are grouped together by academic year.
3. The courses and other requirements for each term are displayed, along with some associated details such as the credits and critical indicator.

Worksheets Plans Notes Exceptions GPA Calc

Student Planner for: [Redacted] View: Compact

**Economics/Admin** Active: Yes  
 Degree: Bachelor of Arts Status: LOCKED  
 Level: Undergraduate

**2014-2015**

Fall 2014, Total Units: 11.0	Winter 2015, Total Units: 13.0	Spring 2015, Total Units: 12.0
* ECON 003 5.0	* ENGL 001B 4.0	BUS 010 4.0
CHFY 007 2.0	* ECON 002 5.0	ENGL 001C or @ @W with BHEW 4.0
* ENGL 001A 4.0	MATH 005 or MATH 008A 4.0	MATH 008B or MATH 009A 4.0
Breadth	Breadth	Breadth

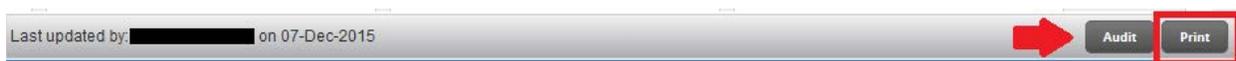
**2015-2016**

Fall 2015, Total Units: 8.0	Winter 2016, Total Units: 5.0	Spring 2016, Total Units: 9.0
CS 008 4.0	STAT 048 5.0	ECON 104A 5.0
BUS 020 4.0	Breadth	HIST 010 or HIST 015 or HIST 020 4.0
Breadth	Breadth	Breadth
Breadth	Breadth	Breadth

4. If a requirement has been marked as “critical” an \* icon will appear next to the requirement on the Compact view. The critical indicator is used to identify requirements that are critical for the completion of the major in a particular term.

Fall 2014, Total Units: 11.0	
* ECON 003	5.0
CHFY 007	2.0
* ENGL 001A	4.0
Breadth	

5. To print from the Compact view, follow these steps:
  - a. Click on the **Print** button located at the bottom of the page



- b. A new window will open. Click on the **“Print”** option on the top right corner.

**ellucian.** Print

**Student Planner for: Arnold, John Martin**

Economics                      Active: Yes  
 Degree: Bachelor of Arts                      Status: LOCKED  
 Level: Undergraduate

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2014-2015

Fall 2014, Total Units: 11.0	Winter 2015, Total Units: 13.0	Spring 2015, Total Units: 8.0
ECON 003                      5.0	ENGL 001B                      4.0	ENGL 001C or @ @W with BHEW                      4.0
CHFY 007                      2.0	ECON 002                      5.0	MATH 008B or MATH 009A                      4.0
ENGL 001A                      4.0	MATH 005 or MATH 006A                      4.0	Breadth
Breadth	Breadth	Elective

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2015-2016

Fall 2015, Total Units: 8.0	Winter 2016, Total Units: 5.0	Spring 2016, Total Units: 5.0
MATH 009B                      4.0	ECON 104A                      5.0	ECON 104B                      5.0
HIST 010 or HIST 015 or HIST 020                      4.0	Breadth	Breadth
Breadth	Breadth	Breadth
Breadth	Breadth	Breadth

## STEPS – ACCESSING THE EDIT VIEW

1. Select **Edit** from the **View** drop-down list
2. The Edit view allows the user to make modifications to a Student’s Course Plan, such as adding or deleting course requirements, marking a requirement as critical, or inserting a minimum grade requirement. You can edit the Plan and then Save.
3. Please refer to the *How to Modify an Assigned Course Plan* document for more information.
4. **There is no print option for this view.**

Worksheets Plans Notes Exceptions GPA Calc

Student Planner for: [redacted] View: Edit

Description: Economics  Active  Locked

Degree: Bachelor of Arts Level: Undergraduate

Fall 2014 Total Units: 11.0

Critical	Course Requirement	Units	Minimum Grade	Notes
<input type="checkbox"/>	ECON 003	5.0	None	
<input type="checkbox"/>	CHFV 007	2.0	None	
<input type="checkbox"/>	ENGL 001A	4.0	None	

Placeholder Requirement: Breadth Value: ANTH/PSYC/SOC

Winter 2015 Total Units: 13.0

Critical	Course Requirement	Units	Minimum Grade	Notes
<input type="checkbox"/>	ENGL 001B	4.0	None	
<input type="checkbox"/>	ECON 002	5.0	None	

Critical	Choice Requirement	Minimum Units	Pointer	Minimum Grade	Notes
<input type="checkbox"/>	MATH 005 or MATH 008A	4.0	None	None	

Placeholder Requirement: Breadth Value: SOCIAL SCIENCE

5. Displayed on the header are the Description, Degree, Active/Locked status, and Level.

Description: Economics  Active  Locked

Degree: Bachelor of Arts Level: Undergraduate

6. You can make the Plan Active and/or Locked by checking the boxes indicated below.

Description: Economics  Active  Locked

Degree: Bachelor of Arts Level: Undergraduate

7. Each term will appear in order by academic year, beginning with the first term.

8. Use the scroll bar on the right hand side of the screen to maneuver the page.

Fall 2014 Total Units: 11.0

Critical	Course Requirement	Units	Minimum Grade	Notes
<input type="checkbox"/>	ECON 003	5.0	None	
<input type="checkbox"/>	CHFV 007	2.0	None	
<input type="checkbox"/>	ENGL 001A	4.0	None	

Placeholder Requirement: Breadth Value: ANTH/PSYC/SOC

Winter 2015 Total Units: 13.0

Critical	Course Requirement	Units	Minimum Grade	Notes
<input type="checkbox"/>	ENGL 001B	4.0	None	
<input type="checkbox"/>	ECON 002	5.0	None	

Critical	Choice Requirement	Minimum Units	Pointer	Minimum Grade	Notes
<input type="checkbox"/>	MATH 005 or MATH 008A	4.0	None	None	

Placeholder Requirement: Breadth Value: SOCIAL SCIENCE

Spring 2015 Total Units: 8.0

Critical	Choice Requirement	Minimum Units	Pointer	Minimum Grade	Notes

9. A course requirement may be marked as “critical” using the **critical indicator box** located in the Edit view. The critical indicator box will show on all requirements, except Placeholders. All users, except student users, have access to check and uncheck this critical indicator box.

Fall 2014 Total Units: 11.0

Critical	Course Requirement
<input checked="" type="checkbox"/>	ECON 003
<input type="checkbox"/>	CHFY 007
<input checked="" type="checkbox"/>	ENGL 001A

Placeholder Requirement

Breadth

10. Further, only a student user will see a  (round gray exclamation) icon appear on their Edit view indicating the course requirement is critical for an on-time graduation.

Fall 2014 Total Units: 11.0

Critical	Course Requirement
	ECON 003
	CHFY 007
	ENGL 001A

Placeholder Requirement

Breadth

11. The Still Needed list of courses is displayed in a separate box on the right hand side of the screen. Use the scroll bar to view the requirements still needed for this plan. For information on using the Still Needed list, see procedures on *How to Modify an Assigned Course Plan*.

The screenshot displays a course plan for an Undergraduate Bachelor of Arts degree in the Economical/Admin track. The plan is active and shows requirements for three terms: Fall 2014 (11.0 units), Winter 2015 (13.0 units), and Spring 2015 (12.0 units). A sidebar on the right, titled 'Still Needed', lists the remaining requirements, including a Degree in Bachelor of Arts, College of Humanities, Arts, & Soc Sci G, English Comp for Col of Hum, Arts, & So, Breadth for College of Humanities, Arts, & Soc Sci, Upper-division Economics, and Upper-division Economics Major GPA. Below these are listed 11.74 units of courses such as BUS 106 or BUS 153 or BUS 160 or BUS 162 or BUS 178 or ECON 100 199 or ENSC 143A or ENSC 143B or ENSC 143C or HISA 123 or LNST 185 or LNST 187 or PHIL 119 or URST 146 or ECON 155.

## FINAL QUIZ

1. A plan can be made active in the Compact View.
  - a. FALSE. A plan can only be changed while in Edit View.
2. Students' Self-service will display the plan from Degree Works that is:
  - a. Active
  - b. Locked
  - c. Active and Locked
  - d. None of the above

Answer: C
3. A user can print the plan from the Edit view.
  - a. FALSE. A user can only print from the Compact view.
4. A student can remove the critical indicator from a course plan.
  - a. FALSE. Only an advisor can remove a critical indicator from a course plan.
5. The Critical Indicator is used to identify courses that are required to be taken in a particular term for an on-time graduation.
  - a. TRUE
6. The Compact view displays course data in a view-only calendar presentation that is suitable for printing. You cannot make modifications to the plan in this view.
  - a. TRUE