COURSE PLAN VIEWS

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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.
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.

**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.

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.
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.

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

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

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.
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.

![Critical Indicator Box](image1)

10. Further, only a student user will see a ![exclamation icon](image2) (round gray exclamation) icon appear on their Edit view indicating the course requirement is critical for an on-time graduation.

![Critical Indicator with Exclamation Icon](image3)

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*. 

![Still Needed List](image4)
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