

HOW TO CREATE A TERM PLAN IN R'WEB

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REVISION HISTORY

Version	Date	Name	Description

INTRODUCTION AND PURPOSE

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, co requisites, 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.

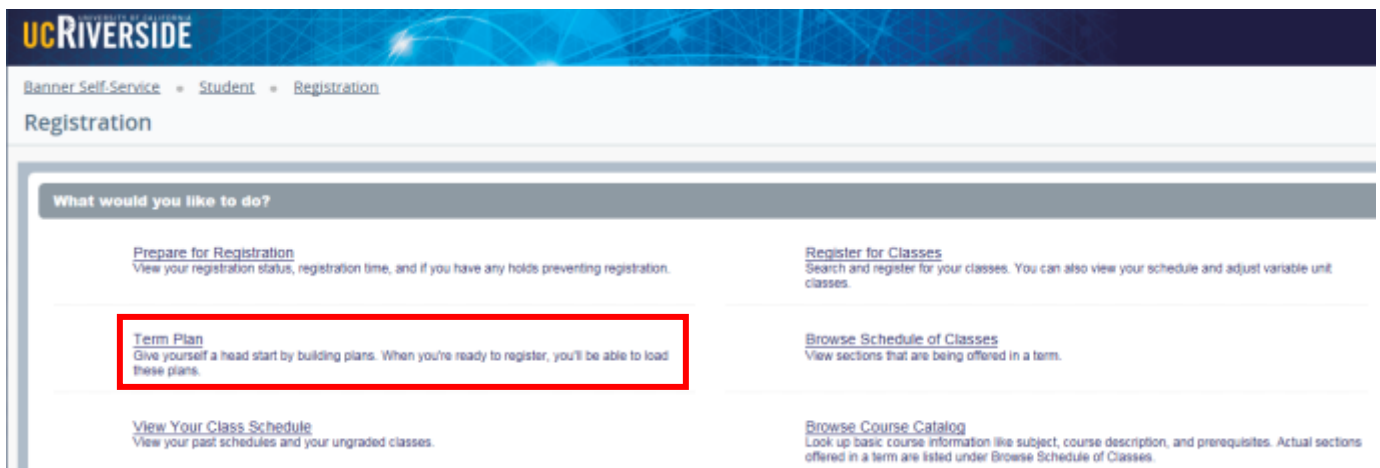
PROCEDURES

1. Go to Rweb.ucr.edu.
2. Enter your UCR NetID and password.
3. Select **Registration** in the Applications window.



Registration

4. Select **Term Plan**.



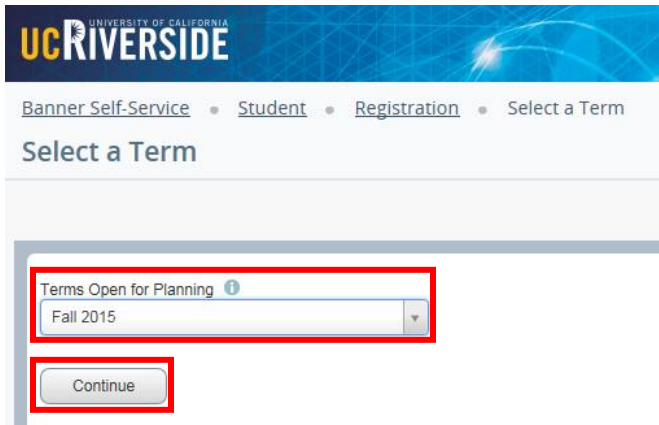
UCRIVERSIDE
Banner Self-Service > Student > Registration

Registration

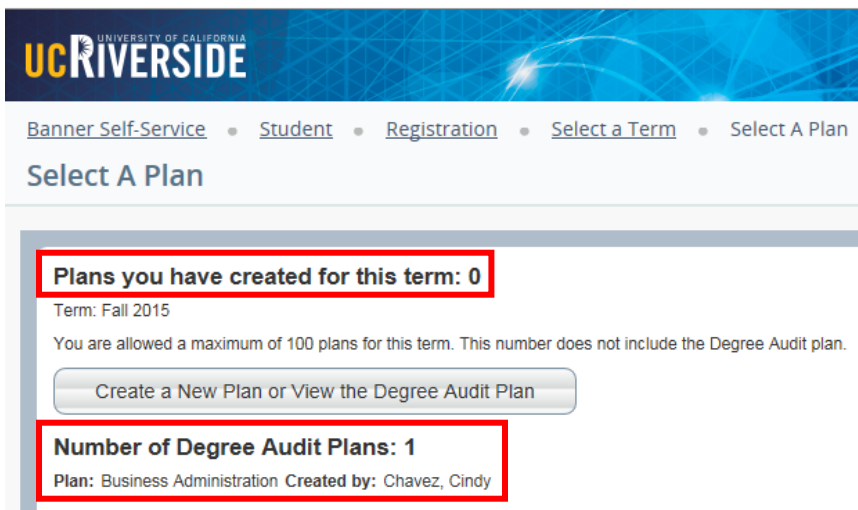
What would you like to do?

- Prepare for Registration**
View your registration status, registration time, and if you have any holds preventing registration.
- Register for Classes**
Search and register for your classes. You can also view your schedule and adjust variable unit classes.
- Term Plan**
Give yourself a head start by building plans. When you're ready to register, you'll be able to load these plans.
- Browse Schedule of Classes**
View sections that are being offered in a term.
- View Your Class Schedule**
View your past schedules and your ungraded classes.
- Browse Course Catalog**
Look up basic course information like subject, course description, and prerequisites. Actual sections offered in a term are listed under Browse Schedule of Classes.

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**.

UNIVERSITY OF CALIFORNIA
UCRIVERSIDE

[Banner Self-Service](#) • [Student](#) • [Registration](#) • [Select a Term](#) • [Select A Plan](#)

Select A Plan

Plans you have created for this term: 0
Term: Fall 2015

You are allowed a maximum of 100 plans for this term. This number does not include the Degree Audit plan.

[Create a New Plan or View the Degree Audit Plan](#)

Number of Degree Audit Plans: 1
Plan: Business Administration Created by: Chavez, Cindy

8. Term Plan opens up where he/she can either Find Classes to create a plan or view their Degree Audit Plan.

[Banner Self-Service](#) • [Student](#) • [Registration](#) • [Select a Term](#) • [Select A Plan](#) • [Term Plan](#)

Term Plan

[Find Classes](#) [Degree Audit Plans](#)

Enter Your Search Criteria
Term: Fall 2015

Subject and Course Number

Subject

Course Number

Keyword (With Any Words)

Level

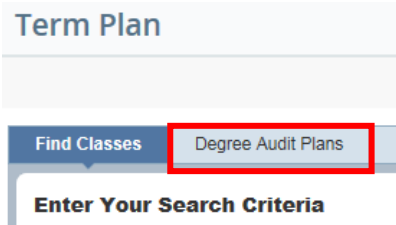
Title

General Education Requirements and Fees

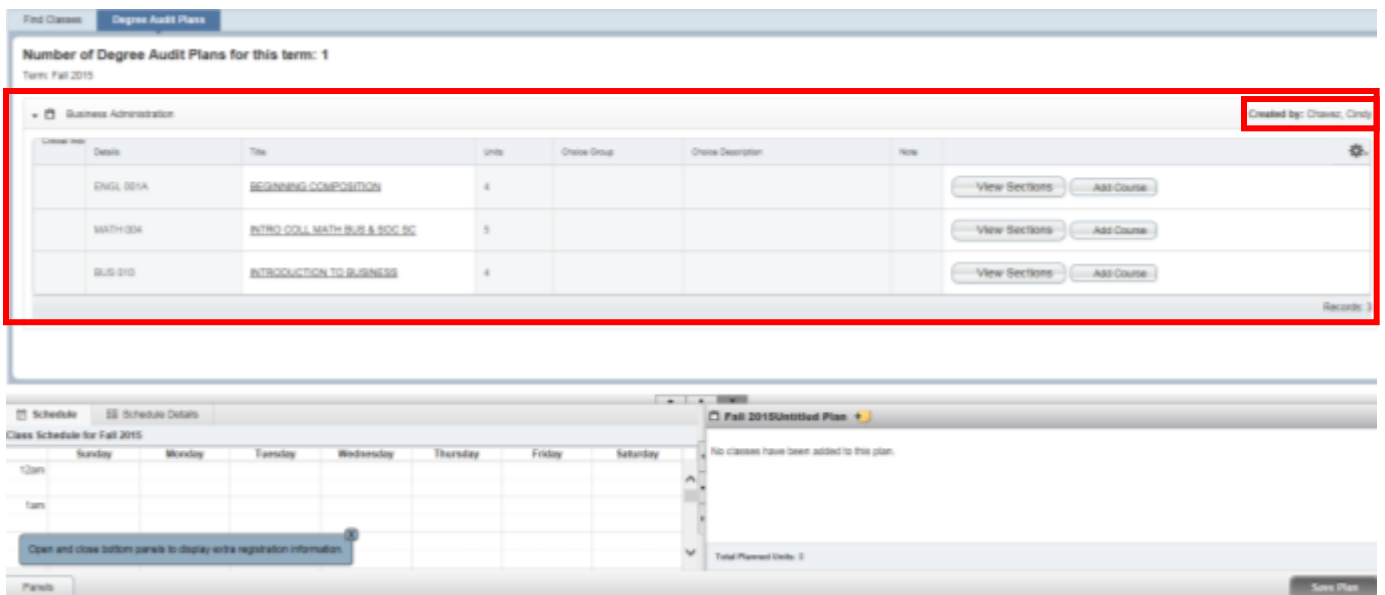
Departments

[Clear](#) [Advanced Search](#)

- 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.

Banner Self-Service » Student » Registration » Select a Term » Select A Plan » Term Plan

Term Plan

Find Classes | Degree Audit Plans

Enter Your Search Criteria

Term: Fall 2015

Subject and Course Number

Subject

Course Number

Keyword (With Any Words)

Level

Title

General Education Requirements and Fees

Departments

Search Clear [Advanced Search](#)

Open and close bottom panels to display extra registration information.

Panels Save Plan

10. As you begin your search, possible matches will list as the information is entered in the fields.

Find Classes | Degree Audit Plans

Enter Your Search Criteria

Term: Fall 2015

Subject and Course Number BUSI

Subject BUS020 Business

Course Number BUS010 Business

Keyword (With Any Words)

Level

Title

General Education Requirements and Fees

Departments

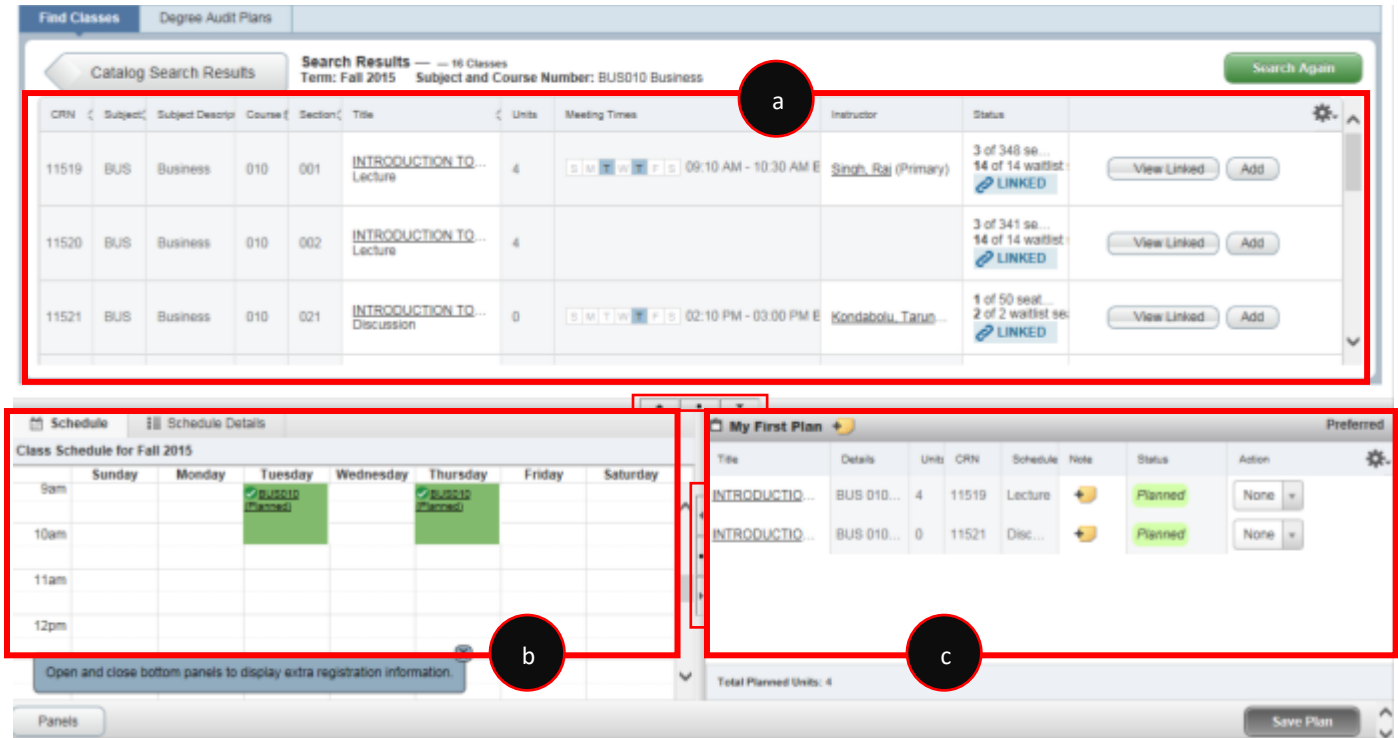
Search Clear [Advanced Search](#)

11. More than one entry can be entered in each field.
- Enter your search criteria in any of the fields and press **Search**.

The screenshot shows the 'Enter Your Search Criteria' form. At the top, there are tabs for 'Find Classes' and 'Degree Audit Plans'. Below the tabs, the form is titled 'Enter Your Search Criteria' and shows 'Term: Fall 2015'. The form contains several input fields: 'Subject and Course Number' (with two tags: 'x BUS010 Business' and 'x BUS020 Business'), 'Subject', 'Course Number', 'Keyword (With Any Words)', 'Level', 'Title', 'General Education Requirements and Fees', and 'Departments'. At the bottom of the form, there are three buttons: 'Search' (highlighted with a red box), 'Clear', and 'Advanced Search'.

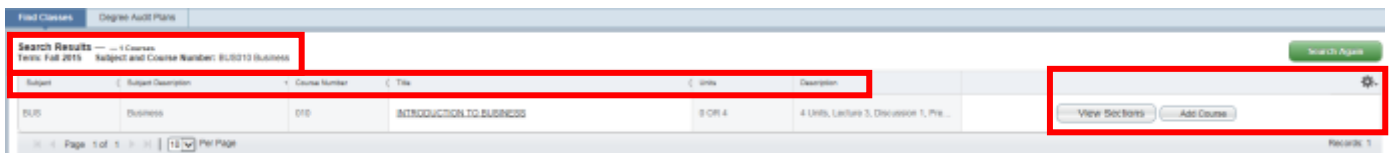
12. The **Search Results** page has three panels. The panels can be minimized or maximized by selecting the toggle arrows or reset back to default by selecting the reset button (the dot).

- Search Results:** Top panel allows you to view search results in a list format.
- 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.
- 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.

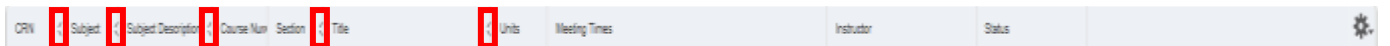


13. The Search Results will show courses that match the search criteria and will organize them by **Subject, Subject Description, Course Number, Title, Units, Description, and by Action**. The order by which the results are organized can be rearranged.

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.

The screenshot shows a search results table with columns: CRN, Subject, Subject Description, Course Number, Section, Title, Units, Meeting Times, Instructor, and Status. A settings menu is open on the right side, listing various columns that can be selected or deselected. The menu items are: CRN, Subject, Subject Description, Course Number, Section, Title, Units, Meeting Times, Instructor, and Status. A red box highlights the settings menu.

CRN	Subject	Subject Description	Course Number	Section	Title	Units	Meeting Times	Instructor	Status
11519	BUS	Business	010	001	INTRODUCTION TO B... Lecture	4	S M T W T F S 09:10 AM - 10:30 AM Buildi	Singh, Raj (Primary)	3 of 348 seats... LINKED
11520	BUS	Business	010	002	INTRODUCTION TO B... Lecture	4	S M T W T F S 08:40 AM - 09:30 AM Buildi	Jasso, Sean (Primary)	3 of 341 seats... LINKED
11521	BUS	Business	010	021	INTRODUCTION TO B... Discussion	0	S M T W T F S 02:10 PM - 03:00 PM Buildi	Kondabolu, Tanuj (P...	1 of 50 seats r... 2 of 2 waitlist seats LINKED
11522	BUS	Business	010	022	INTRODUCTION TO B... Discussion	0	S M T W T F S 03:10 PM - 04:00 PM Buildi	Kaur, Tejinder (Prim...	FULL: 0 of... 2 of 2 waitlist seats LINKED
11523	BUS	Business	010	023	INTRODUCTION TO B... Discussion	0	S M T W T F S 11:10 AM - 12:00 PM Buildi	Lee, Jennifer (Primary)	1 of 50 seats r... 2 of 2 waitlist seats LINKED
11524	BUS	Business	010	024	INTRODUCTION TO B... Discussion	0	S M T W T F S 02:10 PM - 03:00 PM Buildi	Hsieh, Pei-Ju (Primary)	1 of 50 seats r... 2 of 2 waitlist seats LINKED
11525	BUS	Business	010	025	INTRODUCTION TO B... Discussion	0	S M T W T F S 12:10 PM - 01:00 PM Buildi	Li, Jinyi (Primary)	1 of 50 seats r... 2 of 2 waitlist seats LINKED

- d. 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.

A close-up of a column header in the search results table. The header is 'Instructor' and it has a double arrow icon (↔) next to it, indicating that the column width can be adjusted. A red box highlights the double arrow icon.

- 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.

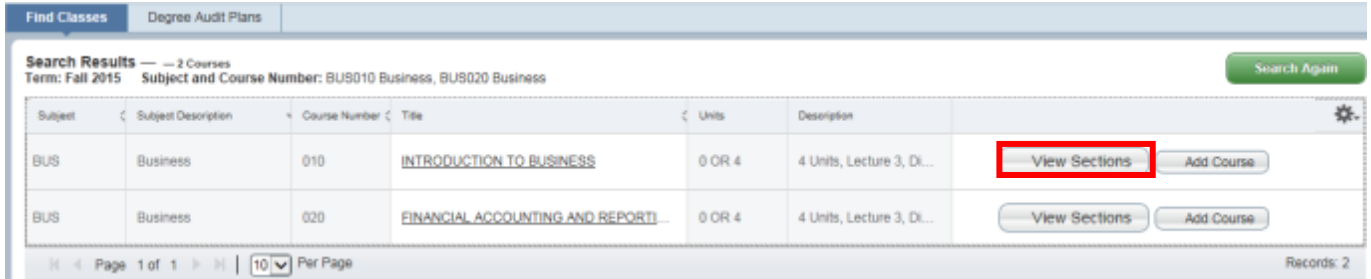
The screenshot shows search results for 'BUS' courses. The table has columns: Subject, Subject Description, Course Number, Title, Units, and Description. For each course, there are two buttons: 'View Sections' and 'Add Course'. A 'Search Again' button is also visible in the top right corner.

Subject	Subject Description	Course Number	Title	Units	Description
BUS	Business	010	INTRODUCTION TO BUSINESS	0 OR 4	4 Units, Lecture 3, Di...
BUS	Business	020	FINANCIAL ACCOUNTING AND REPORTI...	0 OR 4	4 Units, Lecture 3, Di...



- 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. In

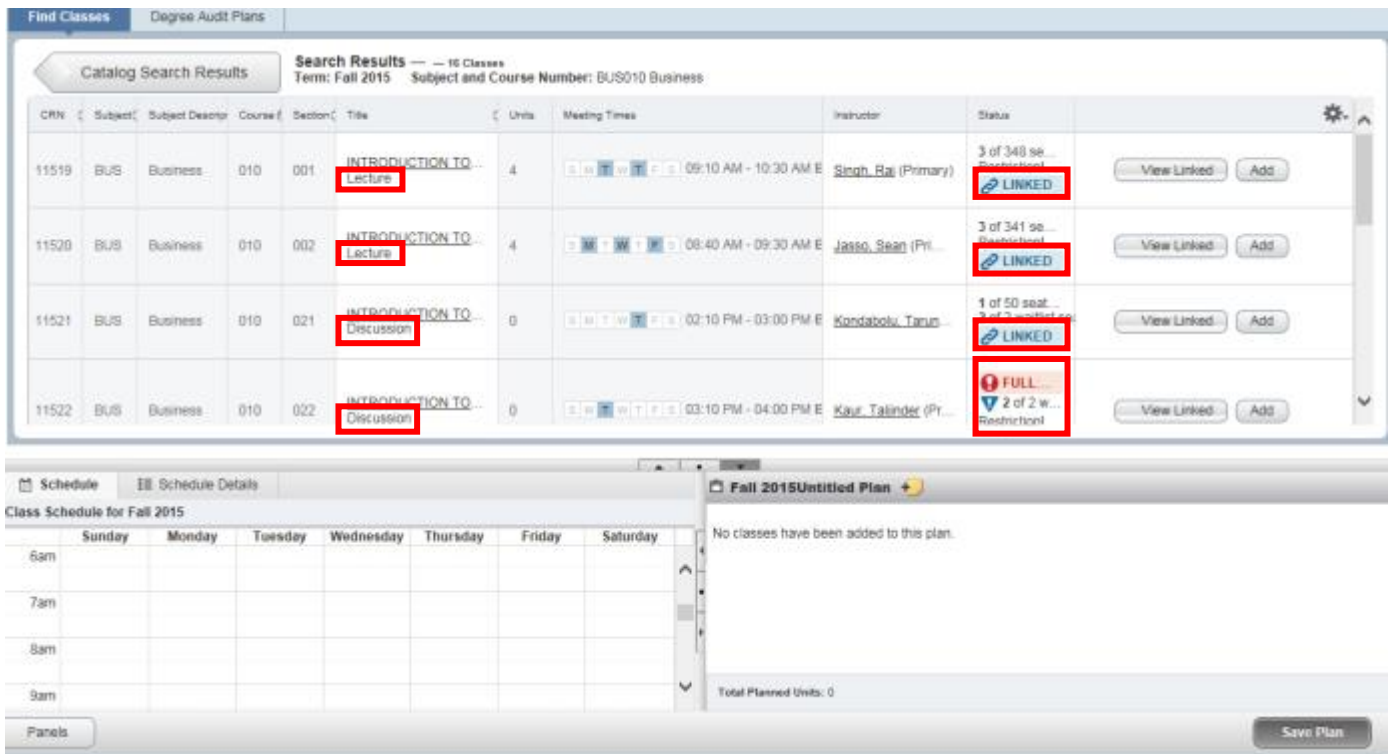
addition, added courses that require enrollment in linked activities will list "0" units but when a section is selected the actual number of units will be added.

15. Select **View Sections**.

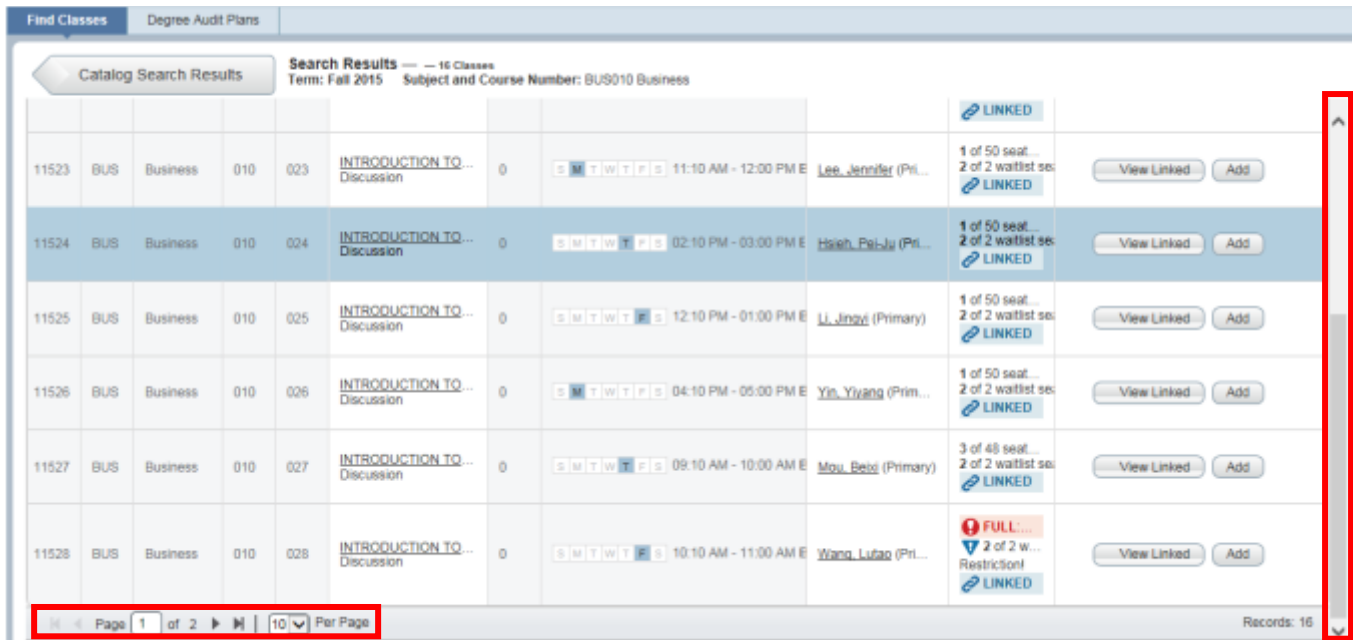


16. The **Search Results** will list sections in sequential order.

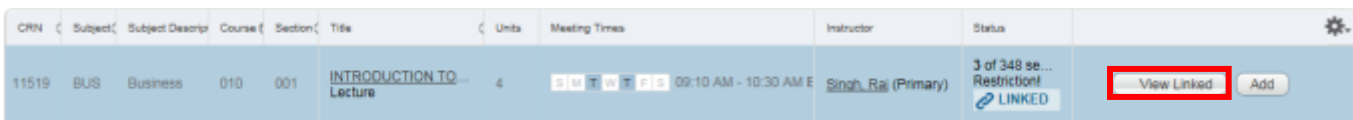
- If sections require enrollment in secondary activities there will be a  icon visible.
- When the section is full and no additional seats are available a  will be visible.
- The example below lists lectures that can be paired with secondary activities. One of the discussions being offered is already 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.

Back To Search Results **Linked Sections** — 7 Options
 Term: Fall 2015 Subject and Course Number: BUS010 Business

Title : INTRODUCTION TO BUSINESS **Schedule Type :** Lecture **CRN:** 11519 Add All

CRN	Subject	Subject Description	Course Num	Section	Title	Units	Meeting Times	Instructor	Status
11521	BUS	Business	010	021	INTRODUCTION TO BUSI... Discussion	0	S M T W T F S 02:10 PM - 03:00 PM Building: N	Kondabolu, Tarun (Prim...	1 of 50 seats re... 2 of 2 waitlist seats n LINKED

Total Units : 0

Title : INTRODUCTION TO BUSINESS **Schedule Type :** Lecture **CRN:** 11519 Add All

CRN	Subject	Subject Description	Course Num	Section	Title	Units	Meeting Times	Instructor	Status
11526	BUS	Business	010	026	INTRODUCTION TO BUSI... Discussion	0	S M T W T F S 04:10 PM - 05:00 PM Building: N	Yin, Yiyang (Primary)	1 of 50 seats re... 2 of 2 waitlist seats n LINKED

Total Units : 0

- a. If **View Linked** is selected on a discussion or lab, then the primary linked section will appear like the example below. This route only shows one schedule option.

Find Classes Degree Audit Plans **Linked Sections** — 1 Options
 Term: Fall 2015 Subject and Course Number: BUS010 Business

Title : INTRODUCTION TO BUSINESS **Schedule Type :** Discussion **CRN:** 11521 Add All

CRN	Subject	Subject Description	Course Num	Section	Title	Units	Meeting Times	Instructor	Status
11519	BUS	Business	010	001	INTRODUCTION TO BUSINESS Lecture	4	S M T W T F S 09:10 AM - 10:30 AM Building: None R	Sesh, Raj (Primary)	3 of 348 seats rem... LINKED

Total Units : 0

- 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.

Title : INTRODUCTION TO BUSINESS **Schedule Type :** Lecture **CRN:** 11519 Add All

CRN	Subject	Subject Description	Course Num	Section	Title	Units	Meeting Times	Instructor	Status
11521	BUS	Business	010	021	INTRODUCTION TO BUSI... Discussion	0	S M T W T F S 02:10 PM - 03:00 PM Building: N	Kondabolu, Tarun (Prim...	1 of 50 seats re... 2 of 2 waitlist seats n LINKED

Total Units : 0

- 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**.

Find Classes Degree Audit Plans

Back To Search Results **Linked Sections** — 7 Options
Term: Fall 2015 Subject and Course Number: BUS010 Business

Title : INTRODUCTION TO BUSINESS Schedule Type : Lecture CRN : 11519 Add All

CRN	Subject	Subject Description	Course Num	Section	Title	Units	Meeting Times	Instructor	Status
11521	BUS	Business	010	021	INTRODUCTION TO BUSI... Discussion	0	S M T W T F S 02:10 PM - 03:00 PM Building: N	Kondsboke, Tarun (Prim...	1 of 50 seats re... 2 of 2 waitlist seats n LINKED

Total Units : 0

Title : INTRODUCTION TO BUSINESS Schedule Type : Lecture CRN : 11519 Add All

Schedule Schedule Details

Fall 2015Untitled Plan +

Class Schedule for Fall 2015

	Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
9am			BUS010 021		BUS010 021		
10am							
11am							
12pm							
1pm							

Title	Details	Units	CRN	Schedule	Note	Status	Action
INTRODUCTIO...	BUS 010...	4	11519	Lecture	+	Pending	Add
INTRODUCTIO...	BUS 010...	0	11521	Disc...	+	Pending	Add

Total Planned Units: 0

Save 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.

Find Classes Degree Audit Plans

Catalog Search Results **Search Results** — 54 Classes
Term: Fall 2015 Subject and Course Number: ENGL001A English

CRN	Subject	Subject Description	Course #	Section	Title	Units	Meeting Times	Instructor	Status
14044	EN...	English	001A	001	BEGINNING COMPO... Lecture	4	M T W T F 10:10 AM - 11:00 AM Bui	Spaite, Terry (Prim...	1 of 22 seats... 2 of 2 waitlist seat
14027	EN...	English	001A	002	BEGINNING COMPO... Lecture	4	S M T W T F 09:10 AM - 10:30 AM Bui	Seil, Jeremy (Prim...	3 of 22 seats... 2 of 2 waitlist seat

Schedule Schedule Details

My Priority Plan +

Class Schedule for Fall 2015

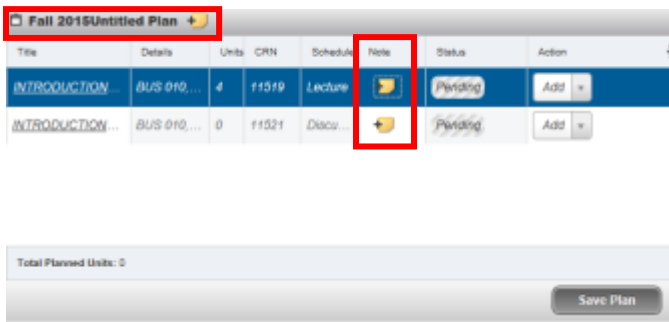
	Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
9am			ENGL001A 002		ENGL001A 002		
10am							
11am							
12pm							
1pm							
2pm					ENGL001A 001		
3pm							


Title	Details	Units	CRN	Schedule	Note	Status	Action
BEGINNING CO...	ENGL 0...	4	14027	Lecture	+	Pending	Add
INTRODUCTIO...	BUS 010...	4	11519	Lecture	+	Pending	Add
INTRODUCTIO...	BUS 010...	0	11521	Disc...	+	Pending	Add

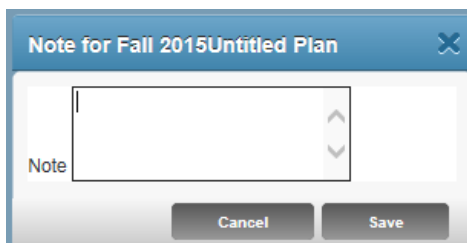
Total Planned Units: 0

Save Plan

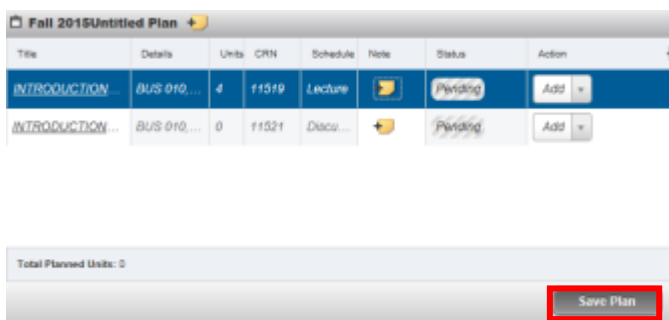
21. As mentioned earlier, notes can be added to the plan title and to sections in the plan.



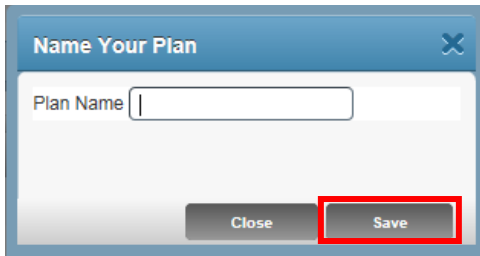
- a. Select  and add notes to the plan title.





22. Press **Save Plan**.



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 .

Banner Self-Service » Students » Registration » Select a Term » Select A Plan » Term Plan

✔ Save Successful

Term Plan

Find Classes Degree Audit Plans

Back To Search Results **Linked Sections** — 7 Options
Term: Fall 2015 Subject and Course Number: BUS010 Business

Title : INTRODUCTION TO BUSINESS **Schedule Type :** Lecture **CRN:** 11519 Add All

CRN	Subject	Subject Description	Course Num	Section	Title	Units	Meeting Times	Instructor	Status
11521	BUS	Business	010	021	INTRODUCTION TO BUSI Discussion	0	TUWTF 02:10 PM - 03:00 PM Building: N	Kosdahlou, Tamir (Prim...	1 of 50 seats re... 2 of 2 waitlist seats r LINKED

Total Units : 0

Title : INTRODUCTION TO BUSINESS **Schedule Type :** Lecture **CRN:** 11519 Add All



Schedule Schedule Details Creating Priority Plan

Class Schedule for Fall 2015

	Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
9am			BUS010 (Lecture)		BUS010 (Lecture)		
10am							
11am							
12pm							
1pm							

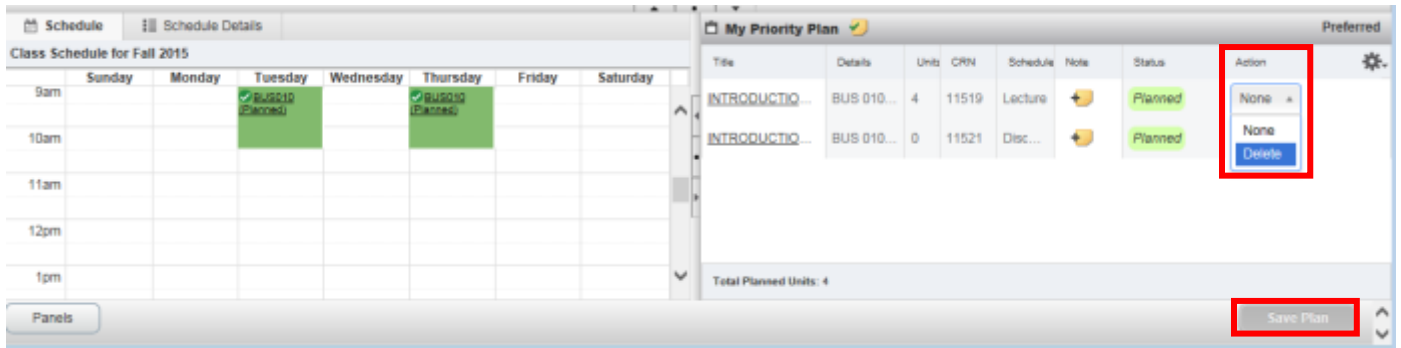
Total Planned Units: 4

Save Plan

Title	Details	Units	CRN	Schedule	Note	Status	Action
INTRODUCTIO...	BUS 010...	4	11519	Lecture		Planned	None
INTRODUCTIO...	BUS 010...	0	11521	Disc...		Planned	None

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.

Plans you have created for this term: 2

Term: Fall 2015

You are allowed a maximum of 3 plans for this term. This number does not include the Degree Audit plan.

Create a New Plan or View the Degree Audit Plan



Plan: My Priority Plan **Created by:** You **Preferred** Delete Edit

Title	Details	Units	CRN	Schedule Type	Instructor	Grade Mode	Note
<u>BEGINNING COMPOSITION</u>	ENGL 001A, 001	4	14044	Lecture	<u>Spiese, Terry</u> (Primary)	Letter	
<u>INTRODUCTION TO COLLEGE MATHEM...</u>	MATH 004, 010	5	16140	Lecture	<u>Villa, Jose</u> (Primary)	Letter	
<u>INTRODUCTION TO COLLEGE MATHEM...</u>	MATH 004, 012	0	16142	Additional Lecture	<u>Britton, Jolene</u> (Primary)	Letter	
<u>INTRODUCTION TO MACROECONOMICS</u>	ECON 002, 001	5	13270	Lecture	<u>McLaren, Craig</u> (Primary)	Letter	
<u>INTRODUCTION TO MACROECONOMICS</u>	ECON 002, 031	0	13281	Discussion	<u>Ro, Yoon</u> (Primary)	Letter	

Total Planned Units: 14 Records: 5

Plan: Secondary Plan-Plan B **Created by:** You (Approved - [Kari E. Geske - Advisor](#)) [Make Preferred](#)

[Delete](#) [Edit](#)

Title	Details	Units	CRN	Schedule Type	Instructor	Grade Mode	Note
INTRODUCTION TO BUSINESS	BUS 010, 001	4	11519	Lecture	Singh, Raj (Primary)	Letter	 ...
INTRODUCTION TO BUSINESS	BUS 010, 021	0	11521	Discussion	Kondabolu, Tarun (Primary)	Letter	
INTRODUCTION TO COLLEGE MATHEM...	MATH 004, 001	5	16131	Lecture	Curtis, Michael (Primary)	Letter	 ...
INTRODUCTION TO COLLEGE MATHEM...	MATH 004, 004	0	16134	Additional Lecture	Arauzo, Andrea (Primary)	Letter	
INTRODUCTION TO MACROECONOMICS	ECON 002, 001	5	13270	Lecture	McLaren, Craig (Primary)	Letter	 ...
INTRODUCTION TO MACROECONOMICS	ECON 002, 031	0	13281	Discussion	Bo, Yoon (Primary)	Letter	

Total Planned Units: 14

Records: 6

Number of Degree Audit Plans: 1

Plan: Business Administration **Created by:** Chavez, Cindy