

HOW TO MODIFY AN ASSIGNED COURSE PLAN

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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 users to Student Course Plans. This training will show users how to navigate and modify a student's already assigned Course Plan in the degree audit.

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

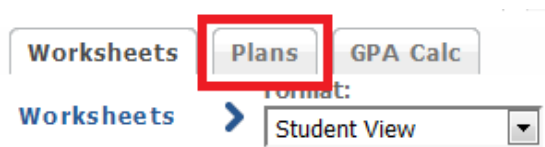
1. College Offices
2. Academic Departments
3. Students

PROCEDURES

CHOOSING A PLAN TO MODIFY

STEPS

1. Once you have your degree audit open, 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: [Redacted] View: **Calendar** View Plan List New Plan

Liberal Studies Active: Yes
Degree: Bachelor of Arts Status: LOCKED
Level: Undergraduate

2013-2014

Fall 2013, Total Units: 9.0	Winter 2014, Total Units: 16.0	Spring 2014, Total Units: 12.0
ENGL 001A 4.0	ENGL 001B 4.0	HIST 010 4.0
POSC 010 5.0	ANTH 001 4.0	WMST 001 4.0
Breadth	CS 008 4.0	ART 001 or ART 002 or ART 005 4.0
	ETST 012 or RLST 012 4.0	Comment

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. **Tip:** When you're on the List of Plans and double-click on a plan, it will automatically load in the default view which is Calendar.
 - a. Choose the plan you would like to modify by highlighting it, and select **Edit** from the **View** drop-down list. In order to make modifications the **View** field must be on **Edit**.

Student Planner for: [Redacted] View: Select New Plan

List of plans

Description:	Active	Modified	Who	Degree:	U	NOT LOCKED
Liberal Studies	N	01/30/2016	Wotherspoon, Barbara A	BA	U	NOT LOCKED
Liberal Studies	N	08/10/2016	Chavez, Cindy	BA	U	NOT LOCKED
Sociology B.A.	N	10/29/2015	Manager, Degree Works	BA	U	NOT LOCKED

View: Select
Audit
Calendar
Edit
Notes

4. Your primary plan should be "active" and "locked".
 - a. A primary plan should be one that is currently being used by both advisor and student to meet the student's academic goal. If the incorrect plan is marked as active/locked, the student may be following the wrong course plan.
 - b. An active and locked plan displays in the **Term Plan** and **Registration** screens in R'Web.

5. The **Active flag** indicates the Plan is current and in use.
 - a. There can only be ONE active plan.
 - b. A student may modify and save a plan that is “active”.
6. **Locked flag** prevents the student from making changes to the Plan which advisors may do provide a guide plan for students.
 - a. A student may not modify and save a plan that has been “locked”, but they can modify it and then save a copy by clicking **Save As**. The Save As button is only activated after a change has been made to the plan.
 - b. Locked status can only be changed by your advisor. It is likely that the initial 4 year course plan assigned to freshmen will remain locked by your advisor so it can serve as a guide for you to build additional plans.

HOW TO MODIFY A REQUIREMENT

A **Course Plan** can be edited term by term. Past, current, and future terms can be edited. You have the option to edit a requirement that is already on your plan, or you can delete that planned requirement and add a new one. An unlimited number of requirements can be added to any term.

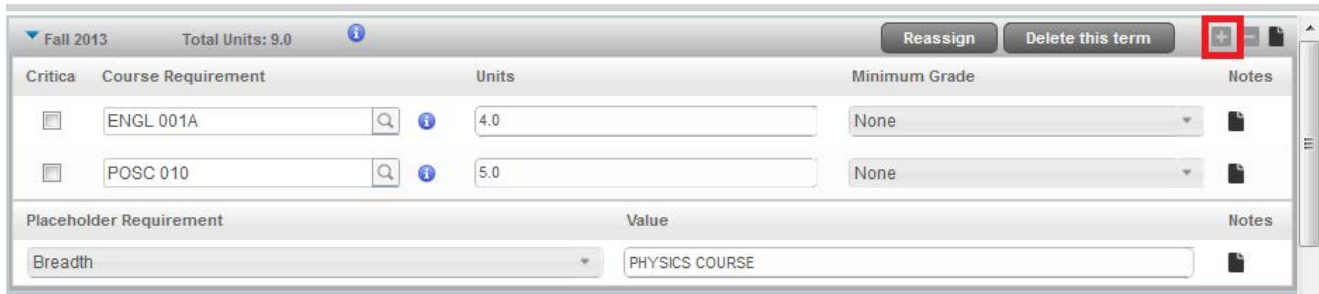
STEPS


1. To **edit** a planned requirement click on the field you want to modify.

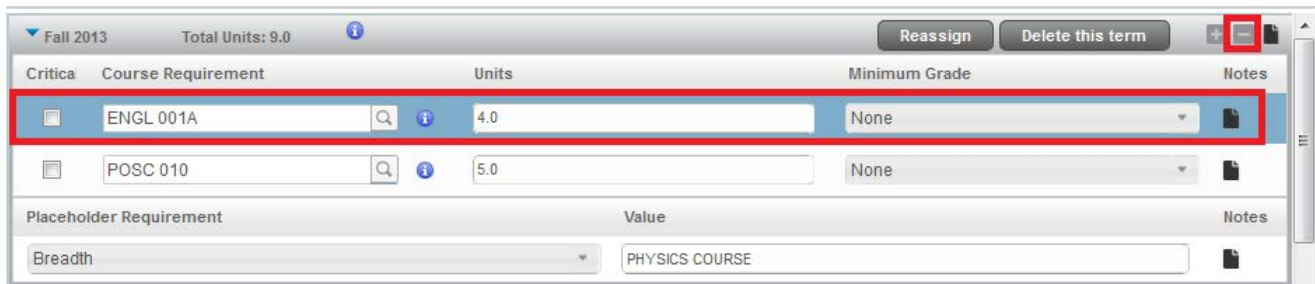
Critical	Course Requirement	Units	Minimum Grade	Notes
<input type="checkbox"/>	ENGL 001A	4.0	None	
<input type="checkbox"/>	POSC 010	5.0	None	

Placeholder Requirement	Value	Notes
Breadth	PHYSICS COURSE	

2. To **add a new requirement** use the **+** icon located on the term header. A drop down list of requirement types will display. There are four requirement types: Course, Choice, Non-course, and Placeholder. The four requirement types will be defined later in this document.



3. To **delete** a Requirement highlight the requirement and click the  icon located on the term header.



4. Requirements can also be moved from one term to another term by **dragging** and **dropping** them.

EDITING A COURSE REQUIREMENT


Course Requirement is used for a single course. There are three ways to edit a course in a course requirement. Enter the subject and course number in the text box, search for it, or choose the course from the Still Needed list.

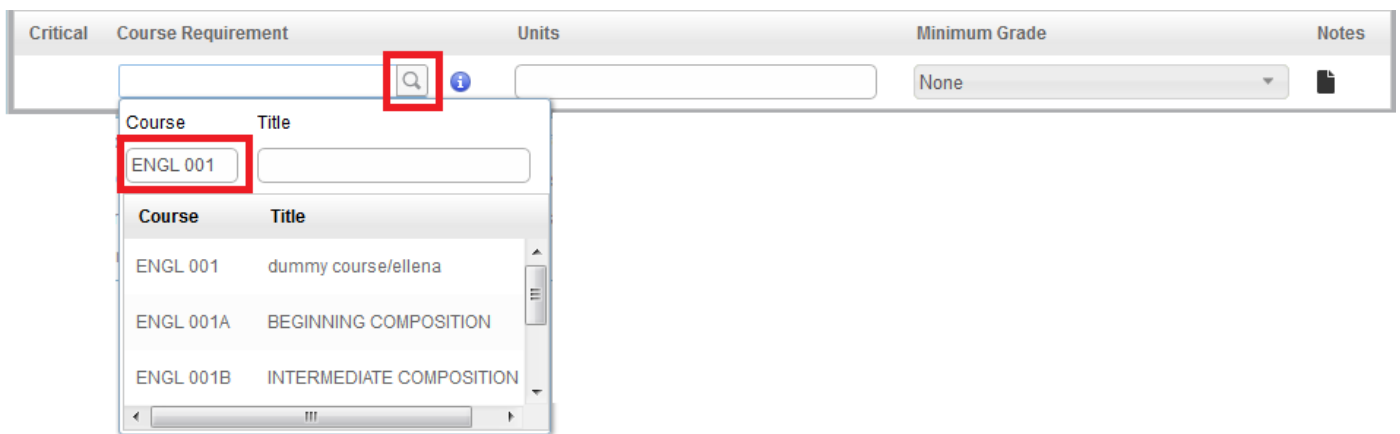
STEPS

1. The first way to add a course is by **typing directly into the text box**. Enter the subject and course number.

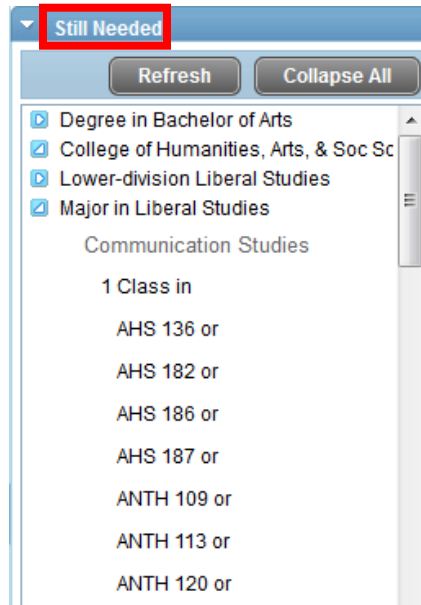
- a. If the course is not valid, a red error box will pop up indicating the error. In the example below the error is appearing because the leading zeroes on the course number are missing.



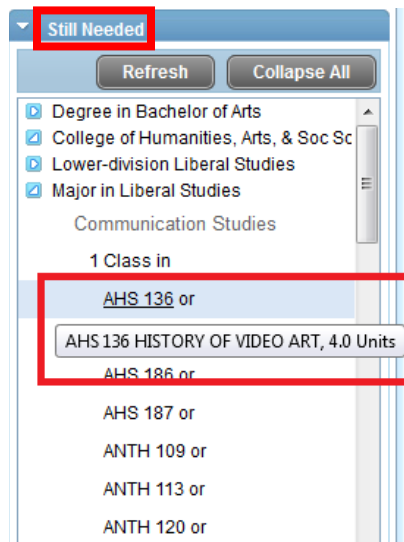
- 2. You also have the option to **search for a course** by clicking on the magnifying glass icon .
 - a. **Searching Tips:** for better results, enter as much information as possible. You may search using the subject, subject and course number, or title of the course.



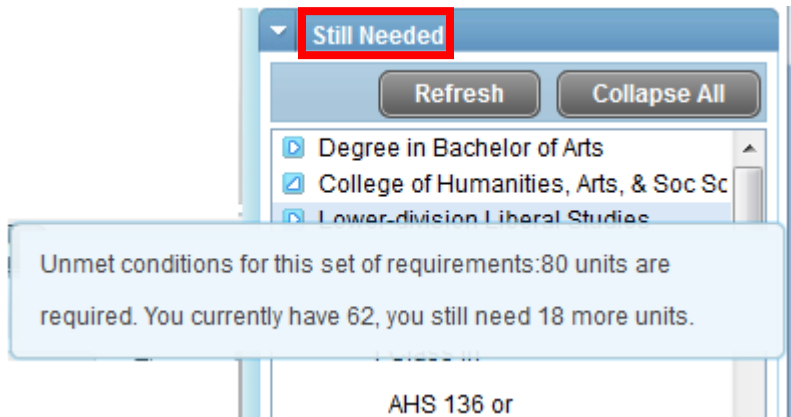
- 3. The last option for adding a course is by using the **Still Needed** list located on the right hand side of the Plan's page. The Still Needed List is a mini planner audit that shows only the requirements that are still needed to complete the plan's associated program.
 - a. **Note:** You can create/assign any plan with any major/degree to your course plan. However, the **Still Needed** list always displays requirements left based on what your **current** declared degree/major goal is, not based on the Plan's chosen degree/major.



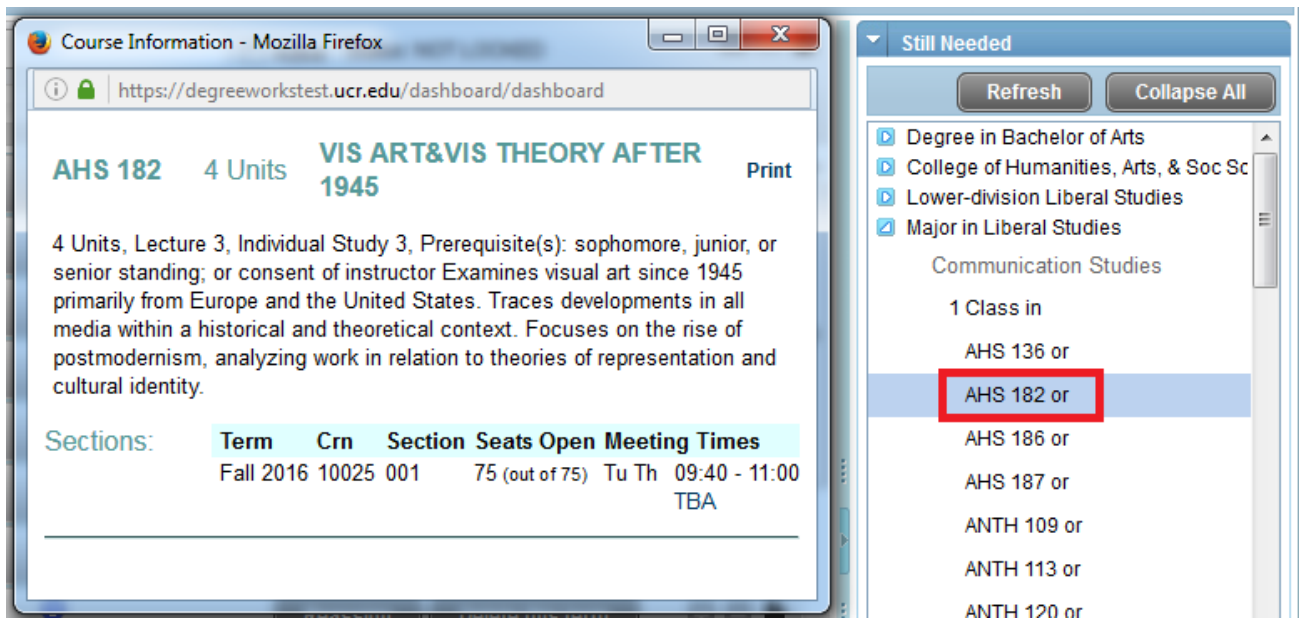
b. If you hover over the courses in the **Still Needed** list, it tells you the title of the course and units.



c. Additional information will show when you hover over the degree requirements in the **Still Needed** box.



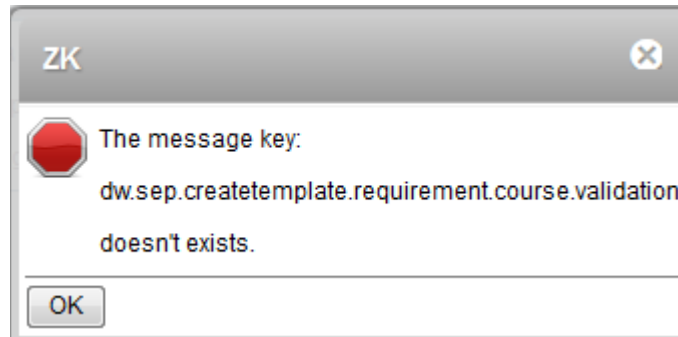
- d. When you click a course, additional information such as the course description, meeting times, and prerequisites will display.



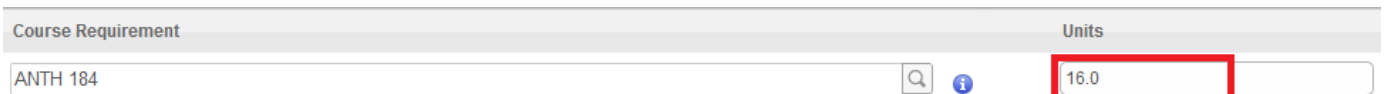
- 4. Once you have successfully chosen and entered a course in a Course Requirement, the **Units** automatically load.



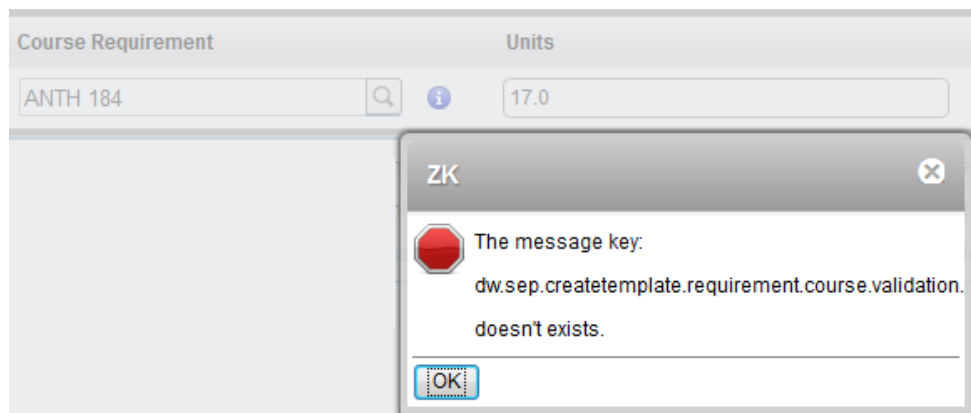
5. The units for the majority of the courses are fixed and cannot be changed. For multi-activity credit courses such as a lecture and discussion pair, you must add the unit value of the primary activity (the lecture). If you try to add a unit amount different than the approved units, you will get an error message. In the example below, a 2-unit value was entered, and the error displayed indicates that the value doesn't exist.
 - a. **Note:** You will not be able to save your plan if this type of error is ignored and not corrected.



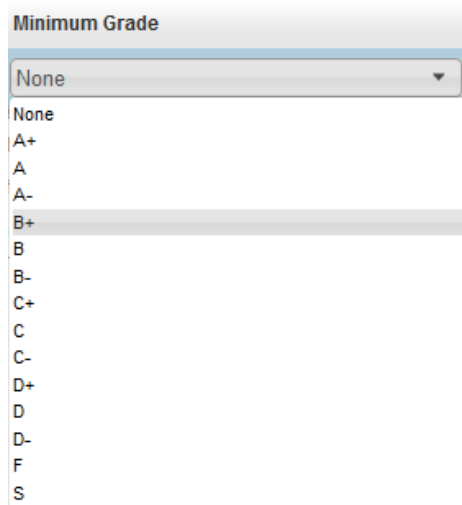
6. If the course is a variable credit course, then the maximum units for that course are displayed, and you can change the number of units to a value within the range for that course. In the example below, ANTH 184 varies in credits (4-16 units), the maximum number displays (16.0 units).
 - a. If anything outside of that range is entered you will get an error message stating that the value doesn't exist.



- a. If anything outside of that range is entered you will get an error message stating that the value doesn't exist.




7. A **Minimum Grade** can be assigned by choosing one of the drop-down options. Consult the catalog or your advisor for minimum grade requirements of a course as these vary by program.



ADDING/EDITING A CHOICE REQUIREMENT

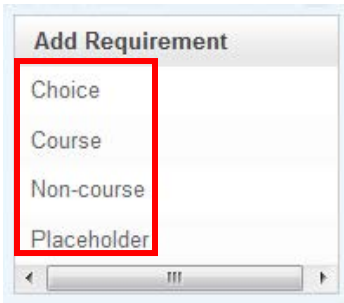
Choice Requirement is used when there are several course options that can fulfill a planned requirement.

STEPS

1. To **add** a choice requirement click on the  icon located on the term header.



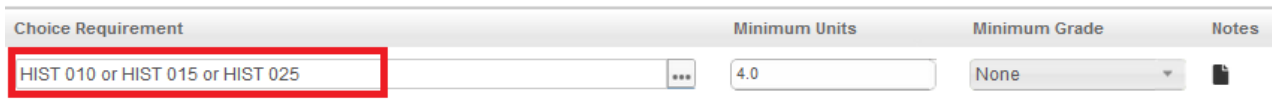
2. You will be given a list of requirement options: **Choice**, **Course**, **Non-course**, and **Placeholder**.



3. Select the **Choice Requirement** and a blank requirement will appear.



4. To edit or begin adding courses to a **Choice Requirement** click in the text box or the  icon.



5. A new window will pop up right below it.




6. You can add a course by typing the subject and course number directly into the text box, or you can search for it using the magnifying glass. Use the **Add another option** button to add an **“OR”** course to your choice requirement. For example, HIST 010 or HIST 015 or HIST 020.

The screenshot shows a 'Choice Requirement' window with a title bar containing 'HIST 010 or HIST 015 or HIST 020'. Below the title bar is a table with four columns: 'Course', 'Attribute', 'Course/Lab', and 'Attribute'. The table contains four rows. The first three rows are populated with 'HIST 010', 'HIST 015', and 'HIST 020' respectively, each with a search icon, an information icon, a 'None' dropdown, and '+' '-' buttons. The fourth row is empty, with a search icon, an information icon, a 'None' dropdown, and '+' '-' buttons. This fourth row is highlighted with a red box. Above the table, there are three buttons: 'Add another option', 'Select none', and 'Done'. The 'Add another option' button is also highlighted with a red box. Below the table, there are three buttons: 'Add another option', 'Select none', and 'Done'.


7. An unlimited number of options can be defined.
- Tip:** Don't click **Add another option** unless you have a course to add. If you keep adding a long list of options all at once this may slow down the system, you may get a message saying "Please be patient while we complete your request." Further, you may have blank options that will need to be deleted one at a time if there is no course to input.
 - An option can be any combination of actual courses such as MATH 101, wildcards such as @ @ (any course), Math @ (any math course), MATH 3@ (any MATH 300 level course), or ranges such as MATH 100:199.
 - Tip:** @ = wild card can be any subject, or any number.
 - Please see below for an example of how this wild card looks when used.

Course	Attribute	Course/Lab	Attribute
MATH @	None		
MATH @@	None		

8. If you need to delete a row, use the  icon to delete a course from your list of choices. This will immediately delete the entire row. In the example below, notice how the one row with HIST 020 is now gone.

HIST 010 or HIST 015 or HIST 025 4.0

Course	Attribute	Course/Lab	Attribute
HIST 010	None		
HIST 015	None		

9. Each option can have up to two courses. Use the  icon to add an “AND” option to your choice requirement. This option is used to enter courses with labs where the course number is different, such as for co-requisites, or requirements where 2 classes must be taken to complete the option. For example, CHEM 001A and CHEM 01LA.

Course	Attribute	Course/Lab	Attribute
CHEM 001	None	CHEM 01L	None

10. Attributes can be selected if known but are not required. The recommendation is to not use Attributes as this is for office use only.
11. Click **Done** to save your changes. You will be directed back to the Choice Requirement.
12. Once you have successfully entered the courses in the Choice Requirement, the **Minimum Units** must be entered/adjusted manually.

13. A **Minimum Grade** can be assigned by choosing one of the drop down options. Consult the catalog or your advisor for minimum grade requirements of a course as these vary by program.

ADDING A NON-COURSE REQUIREMENT

Non-Course Requirement is used to add requirements that are not courses, but satisfies a major requirement. For Example, Language Requirement, Piano (keyboard) Proficiency, Research Project, Thesis etc.

STEPS

1. This option will only allow you to select from the drop-down menu.

The screenshot shows a form titled "Non-Course Requirement". Below the title is a dropdown menu with the text "Select" and a downward arrow. The menu is open, displaying a list of options: Dissertation Proposal Eval, Dissertation Proposal Exam, Dissertation Prospectus, Entrance Audition, Entrance Exam, Exam Paper, Exam Paper Oral, Fellowship Grant Wrtg Wksp, Field Exam, Field Report, Final Defense Masters, Final Defense PhD, Final Project, Health, Internship, Language Requirement 1, Language Requirement 2, Language Requirement Alt, Language: Placed into Arabic, Language: Placed into Chinese, and Language: Placed into Chinese. A vertical scrollbar is visible on the right side of the list.

2. Select an option and enter a **Status**. The **Status** can be left blank or it can also be the alphanumeric score or standing needed to consider the requirement completed.

The screenshot shows the "Non-Course Requirement" form with two fields. The first field, labeled "Non-Course Requirement", has a dropdown menu with "Piano (Keyboard) Proficiency" selected. The second field, labeled "Status", has "COMPLETED" entered. Both the selected option and the status text are highlighted with red rectangular boxes.

ADDING A PLACEHOLDER REQUIREMENT

The Placeholder requirement is a **user-defined** requirement that needs to be completed as part of the degree but a single course has not been identified. For example, this would be used to complete a breadth requirement for an undergraduate student.

STEPS

1. Select a **Placeholder** from the drop down list and add a **Value**.

2. The value can be any note that further explains the Placeholder. The Value should be in terms that are helpful in understanding a requirement. This field is required. Please see below for examples.

Placeholder Requirement	Value	Notes
Comment	U.D. ETST-AFST	
Comment	UPPER DIVISION MATH COURSE	
Breadth	FOREIGN LANGUAGE	
Course range	MATH 100:199	
Advisor approved courses	Must see advisor for a course list	

ADDING OR DELETING/REASSIGNING A TERM TO A PLAN

STEPS - ADDING A TERM

1. If your plan only consists of a traditional three quarter per year term scheme, you have the option of adding a summer term.
2. To **add** a term, click on the icon located on the plan's header.

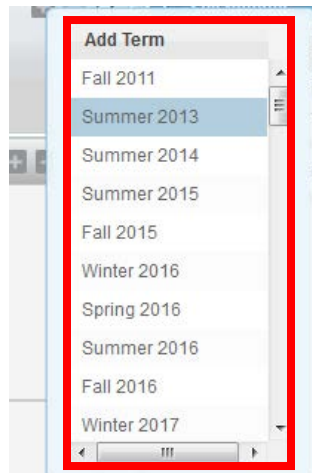
Worksheets Plans GPA Calc

Student Planner for: View: Edit View Plan List New Plan

Description: Liberal Studies Active Status: NOT LOCKED

Degree: Bachelor of Arts Level: Undergraduate

3. A drop-down list of terms appears. Select the **term** you want to add.



4. The term selected is now displayed and added to the plan in chronological order.

Description: Liberal Studies Active Status: NOT LOCKED

Degree: Bachelor of Arts Level: Undergraduate


Term	Total Units	Info	Reassign	Delete this term
Summer 2013	0.0	i	Reassign	Delete this term
Fall 2013	9.0	i	Reassign	Delete this term

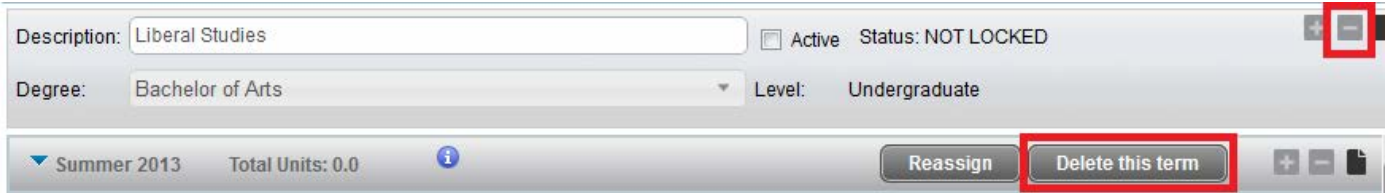
Critical	Course Requirement	Units	Minimum Grade	Notes
	ENGL 001A <input type="text"/>	4.0 <input type="text"/>	None <input type="text"/>	<input type="text"/>
	POSC 010 <input type="text"/>	5.0 <input type="text"/>	None <input type="text"/>	<input type="text"/>

Placeholder Requirement	Value	Notes
Breadth <input type="text"/>	PHYSICS COURSE <input type="text"/>	<input type="text"/>

Term	Total Units	Info	Reassign	Delete this term
Winter 2014	16.0	i	Reassign	Delete this term

STEPS - DELETING/REASSIGNING A TERM

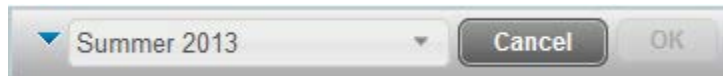
1. To delete a term, click on **Delete This Term** or select the term you want to delete by clicking anywhere inside the term block and then click on the  icon located on the top header.



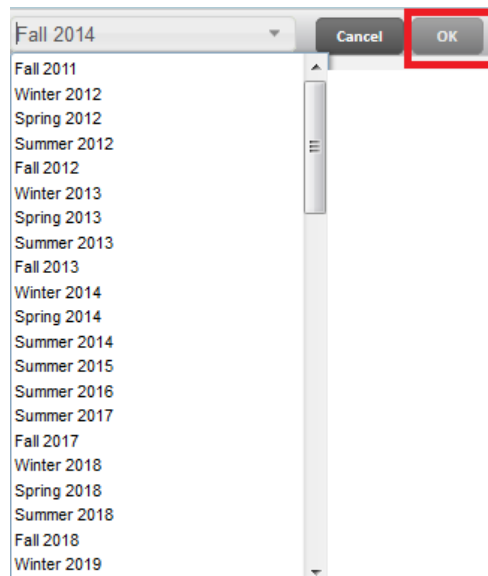
2. To **move the requirements** to another term, click on **Reassign** from the term block you would like to move.



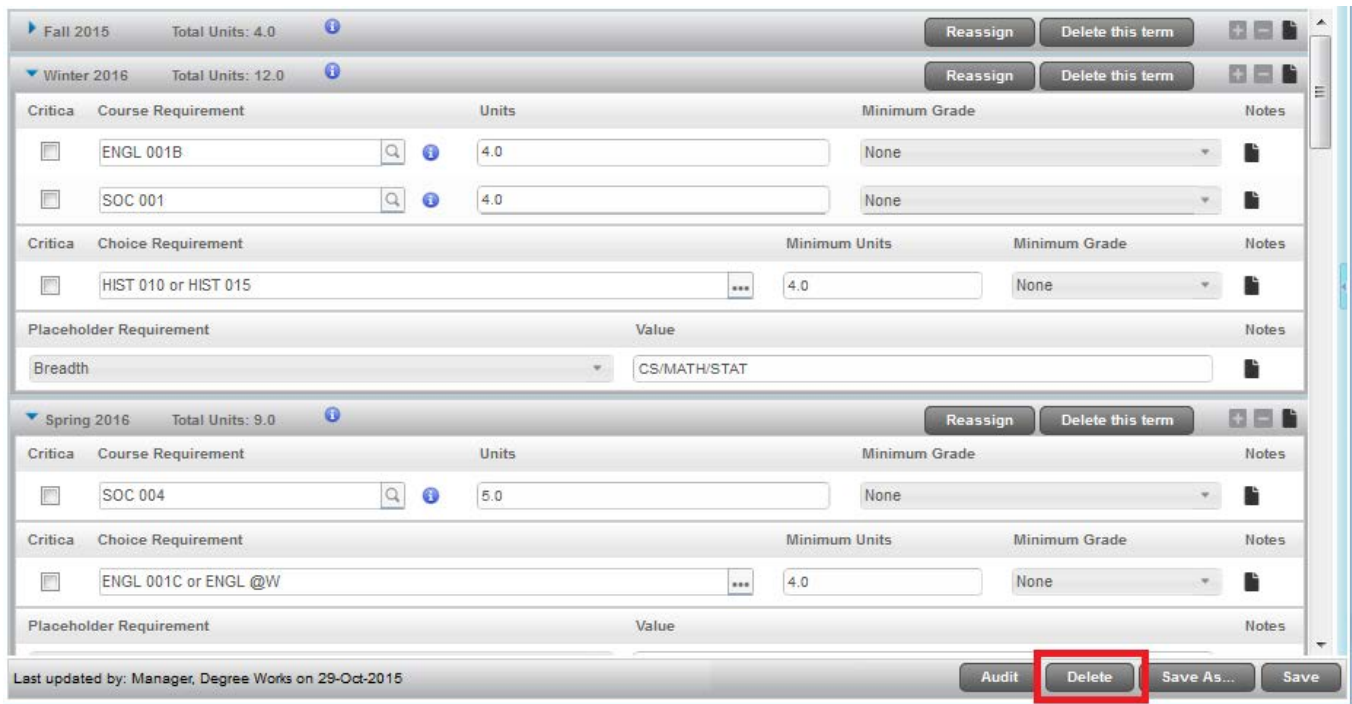
3. The term now becomes a drop-down option and the **Cancel** and **Ok** buttons appear on the term header.



4. Choose the term you want to reassign it to from the drop-down list, and click **OK**. All requirements for that specific term will be reassigned to the new term selected.



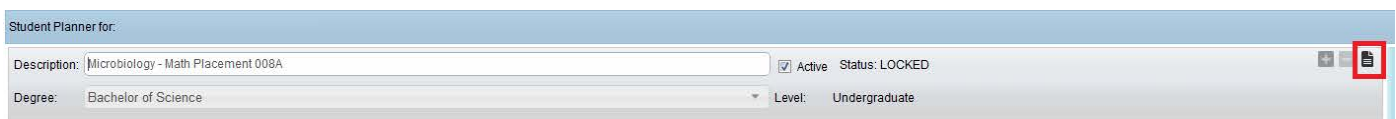
- As a student user you can only delete a plan if it is **not** locked. Click on the **Delete** button located on the footer of the Plan's page.



ADDING AND EDITING NOTES TO A PLAN

STEPS

- Overall plan notes** can be found on the Plan's header.





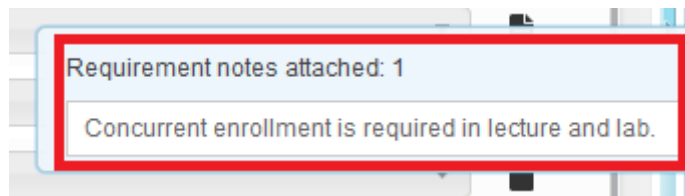
- Term block notes** can be found on the term header.




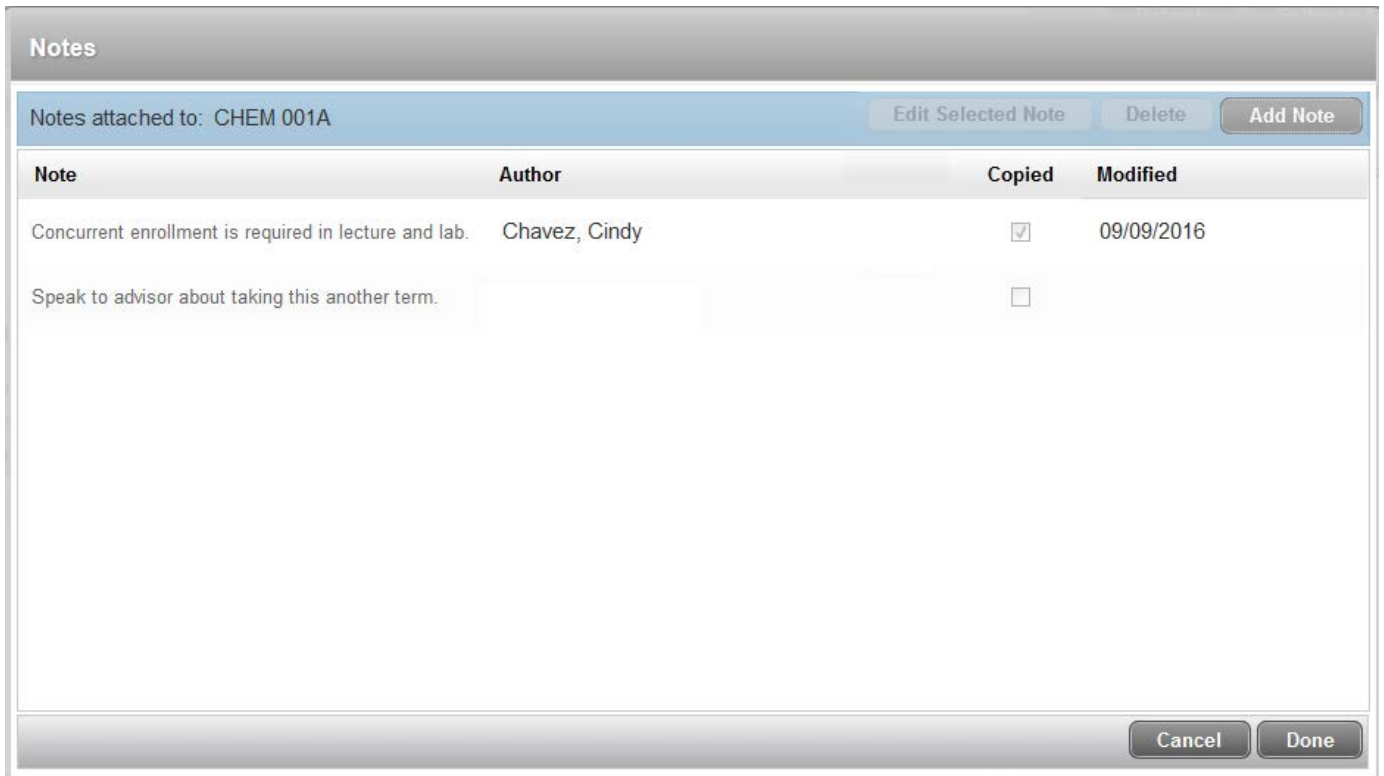
3. Individual requirement notes can be found on the requirement section.



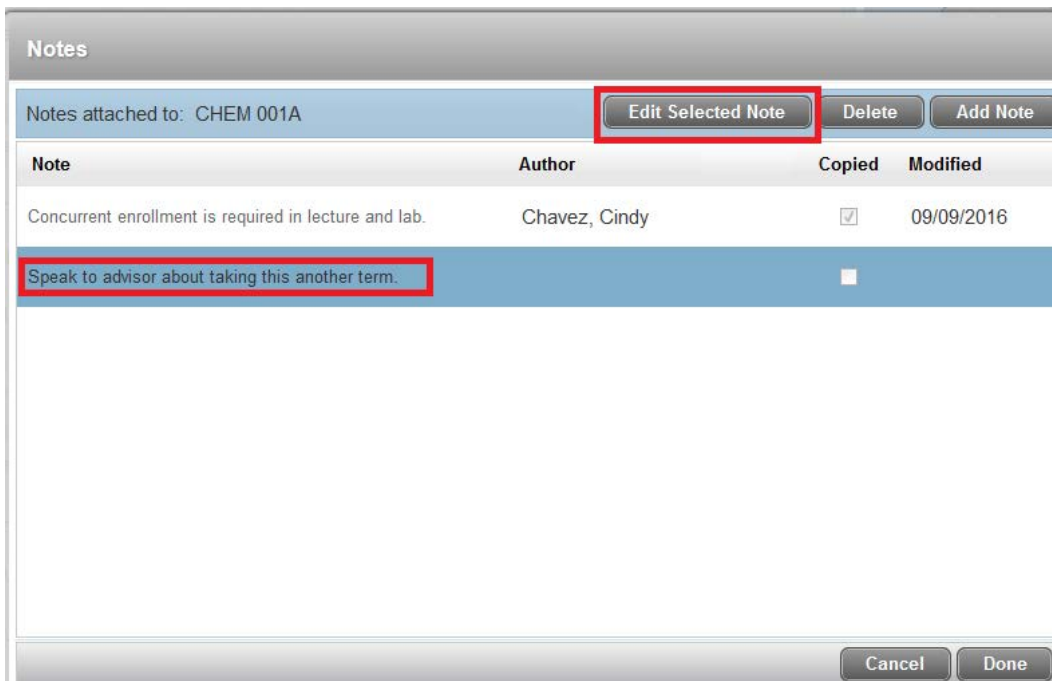
4. A note with some content is indicated by a  black paper icon with lines and a blank note is indicated by a  black paper icon with no lines. Hovering over a note icon gives you the overview of the notes.



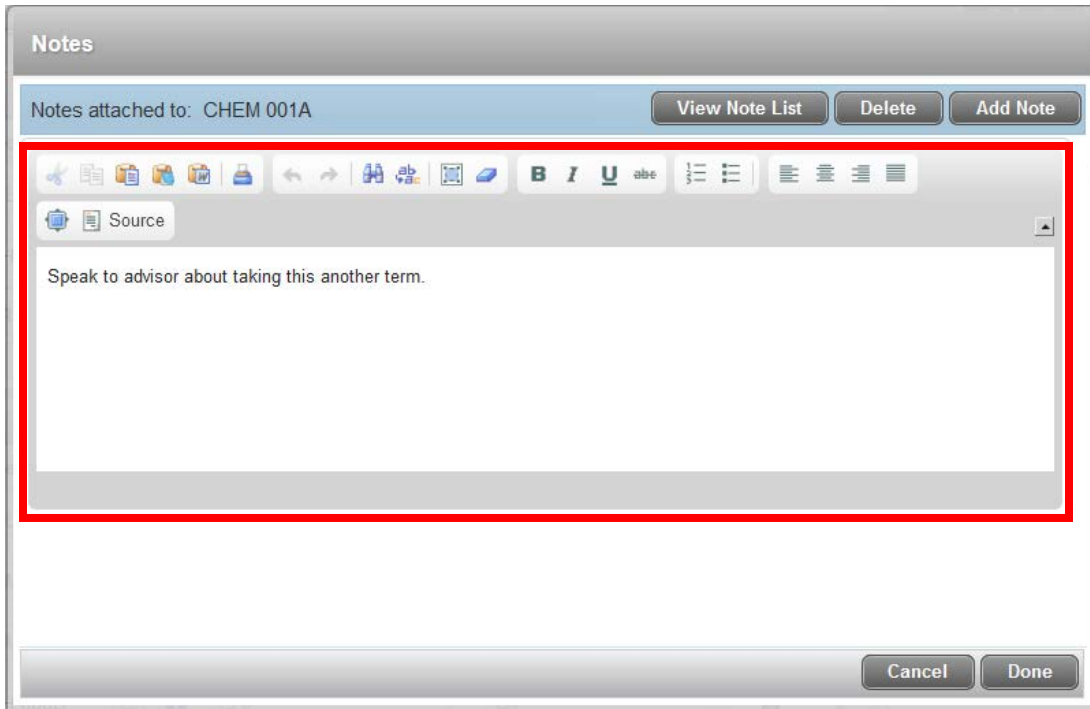
5. To **edit** a note, select the black note icon . Clicking on the note icon opens the note list window. You will be able to see all notes that have been added by other users, but will only be able to modify your own notes.



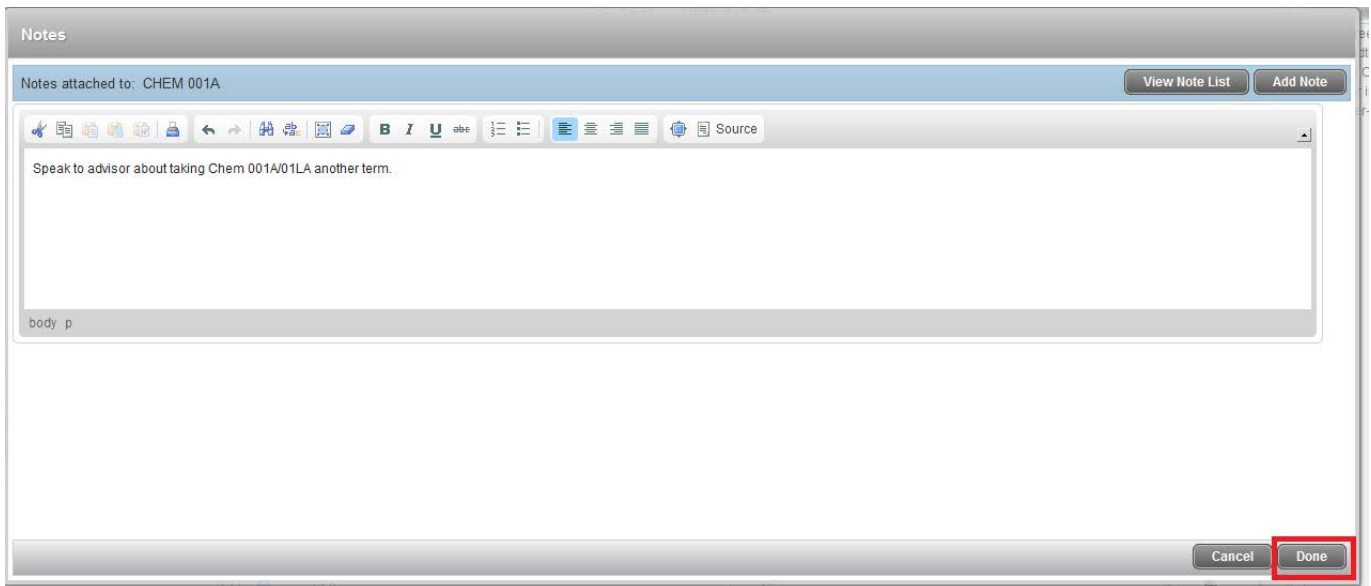
6. Click the note you want to edit, and then click **Edit Selected Note**.



- The text of the note is displayed in a text editor, which supports formatting font, etc.



- Make your edits to the note and click **Done**.



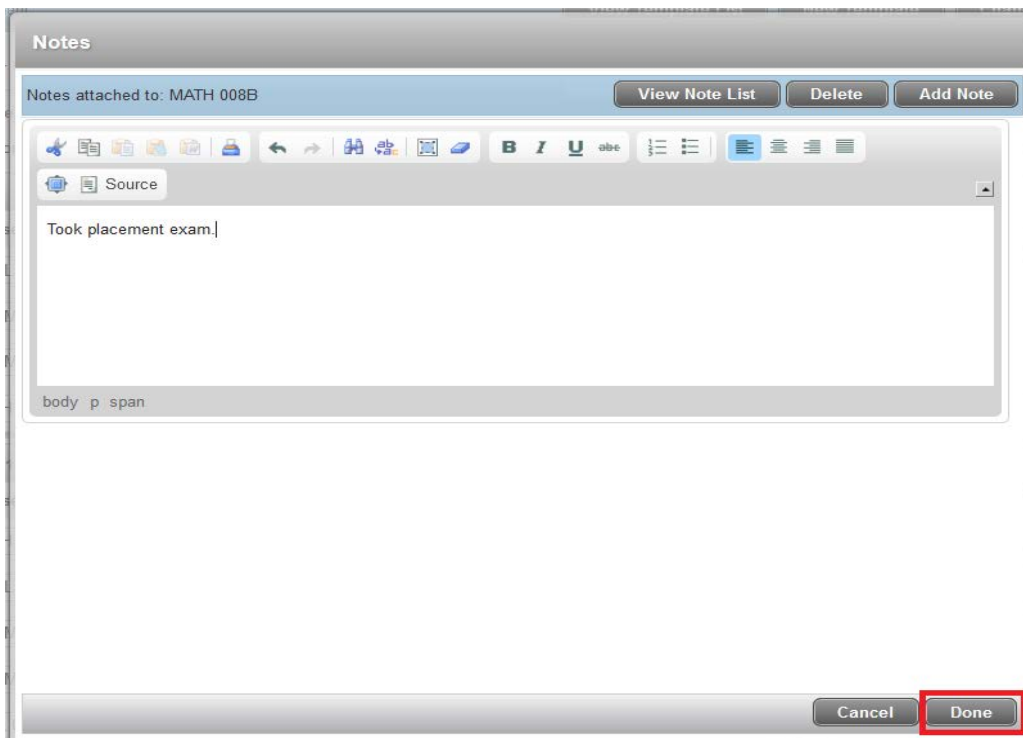
9. To **add** a note, select the note icon where you wish to add a note. Then click on **Add Note**.



10. This opens the note edit window.

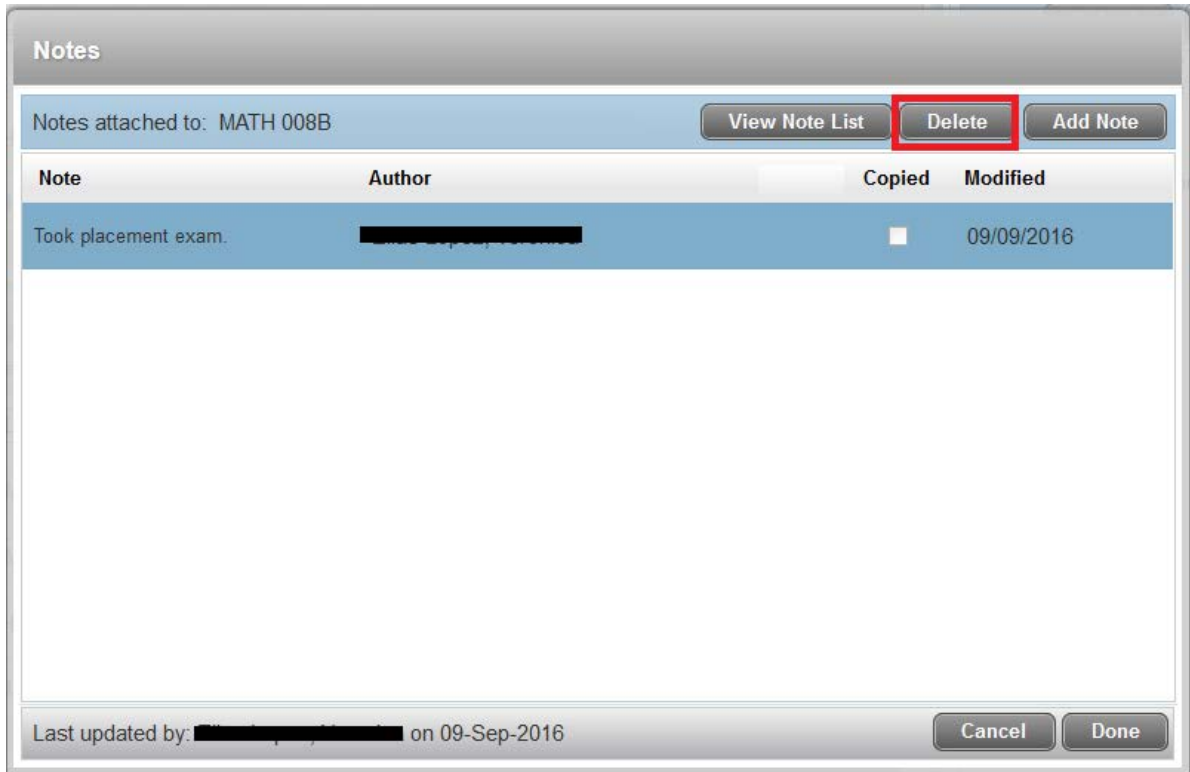
- a. Notes can have an unlimited amount of text and can contain text formatting such as indentation, bullet lists, bolds and italics.

11. Once you've entered a note, click **Done**.



12. To **delete** a note, select the note icon from where you want to delete the note. The notes list is displayed. Click on the note that you want to delete, and then click **Delete**.

- a. Notes should not be deleted unless it is a true error. Maintaining the history is important and this plan is part of your student record.



13. The note is removed. You may only delete your own notes. You may not delete notes entered by other users.

SAVING A COURSE PLAN

STEPS

1. **Changes to a Plan will not automatically save.** User must save all changes. Click **Save** after a modification is made to a course plan. The Save button is located at the bottom right hand corner of the plan's page.

Fall 2015		Total Units: 4.0			Reassign	Delete this term	+ -	
▼ Winter 2016 Total Units: 12.0								
Criteria	Course Requirement	Units	Minimum Grade		Notes			
<input type="checkbox"/>	ENGL 001B	4.0	None					
<input type="checkbox"/>	SOC 001	4.0	None					
Criteria	Choice Requirement	Minimum Units	Minimum Grade		Notes			
<input type="checkbox"/>	HIST 010 or HIST 015	4.0	None					
Placeholder Requirement		Value			Notes			
Breadth		CS/MATH/STAT						
▼ Spring 2016 Total Units: 9.0								
Criteria	Course Requirement	Units	Minimum Grade		Notes			
<input type="checkbox"/>	SOC 004	5.0	None					
Criteria	Choice Requirement	Minimum Units	Minimum Grade		Notes			
<input type="checkbox"/>	ENGL 001C or ENGL @W	4.0	None					
Placeholder Requirement		Value			Notes			
Last updated by: Manager, Degree Works on 29-Oct-2015					Audit	Delete	Save As...	Save