

Plan Ahead Navigation

In this guide, the following topics will be covered:

- A. Plans: General Information
- B. Approving a Plan
- C. Editing/Deleting a Plan
- D. Creating a Plan

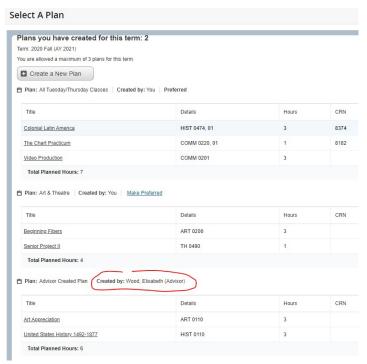
A. Plans: General Information

All personas except the Registrar persona can create plans. Plans allow the user to pre-build plans that include multiple courses and class sections. The user can register directly from a plan with only one click. Plans do not guarantee that the student will be successfully enrolled into the selected courses and sections.

When a user selects a course from the search results, they can add it to the plan at the course level, or view individual sections associated with the course and add the CRN. A plan can have a mix of courses and sections. No restriction checking occurs at this point. Restriction checking occurs when the user enrolls in classes and they add classes to the registration summary from a plan.

Faculty and advisors cannot mark any plan created by a student as preferred.

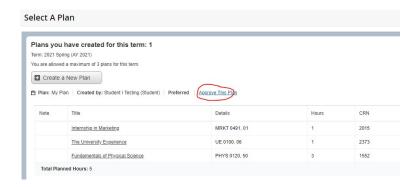
All plans created for students or by students are displayed in the **Select a Plan** page. When plans are displayed that were not created by the login ID user, the name of the plan creator and the associated persona are displayed:



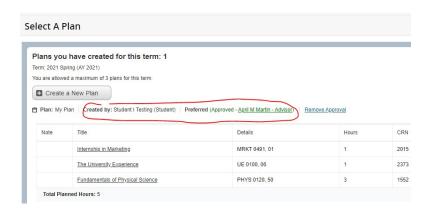
B. Approving a Plan

Faculty members and advisors can approve any plans created by the student or plans created for the student that they themselves created. Note: students are not required to register from an approved plan. When an approved plan or plans exist, the student can still register from any other plan.

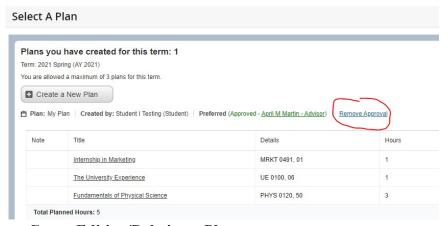
Click the Approve This Plan link:



The name of the user approving the plan and the persona will be displayed:

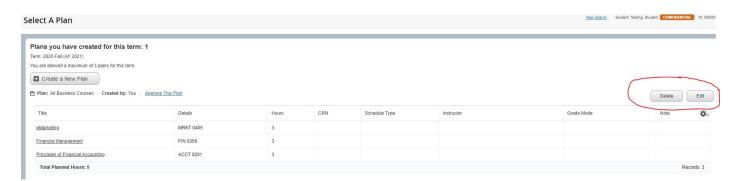


Approval may be removed by clicking the **Remove Approval** link:



C. Editing/Deleting a Plan

Faculty members or advisors can edit or delete plans they had previously created for students:



No plans can be deleted or edited that were not created by the login ID user.

Students may edit or delete plans that they created, including plans that an advisor has approved.

D. Creating a Plan

To create plans, click on Plan Ahead:



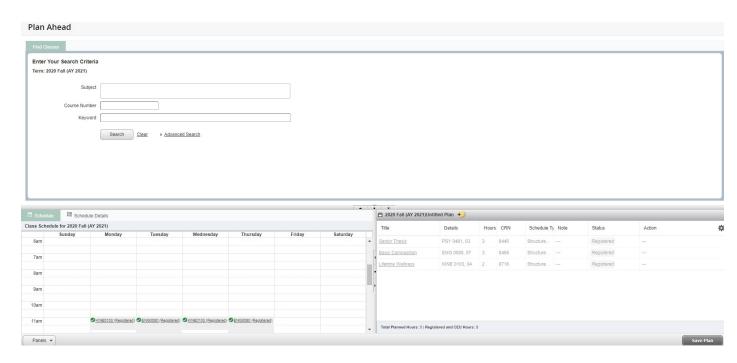
Select a term from the drop-down menu and click **Continue**:



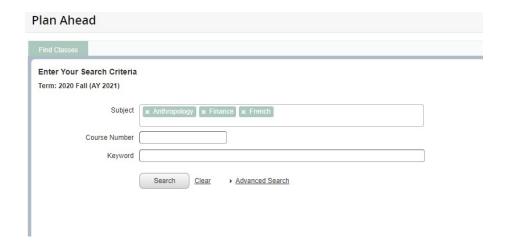
To create a new plan, click the **Create a New Plan** button:



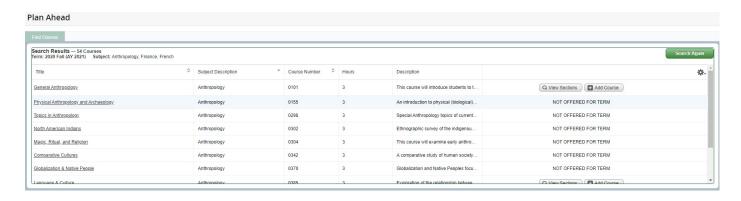
The following screen will be displayed. Any courses the student has already enrolled in will be shown at the bottom of the screen:



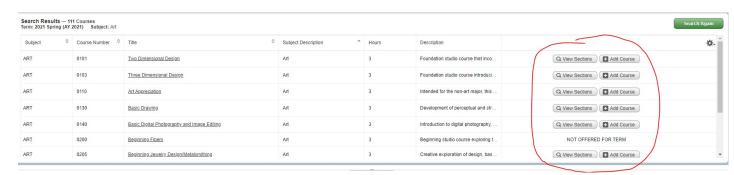
Enter class information in the **Search Criteria** section to look for classes and click the **Search** button:



Search results are displayed:



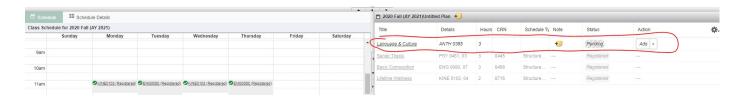
Users have the option to add a course to the plan at the course level or to view the sections available for the course. If there are no sections available for the term, a **Not Offered for Term** message will be displayed.



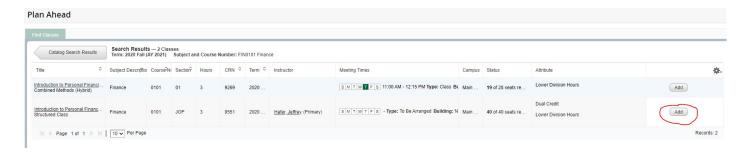
Click the **Add Course** button to add the course to the plan:



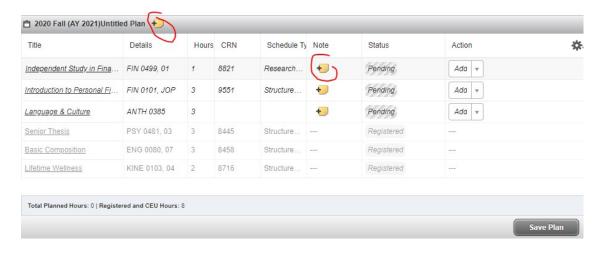
The course will show at the bottom of the screen with a pending status:



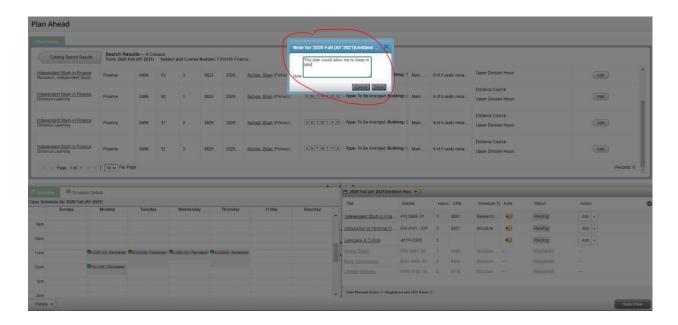
Return to search results to add more classes:



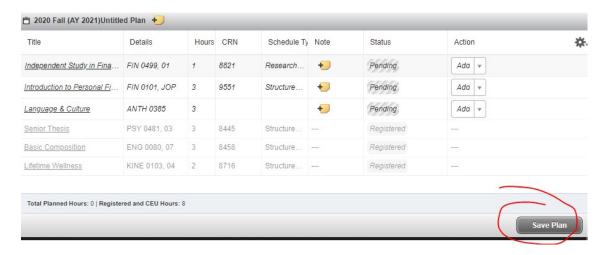
Once all desired classes have been selected, finish creating the plan. Note: notes can be created for the plan and/or for individual courses in the plan. Clicking on the note icon will open a pop up box for notes to be entered:



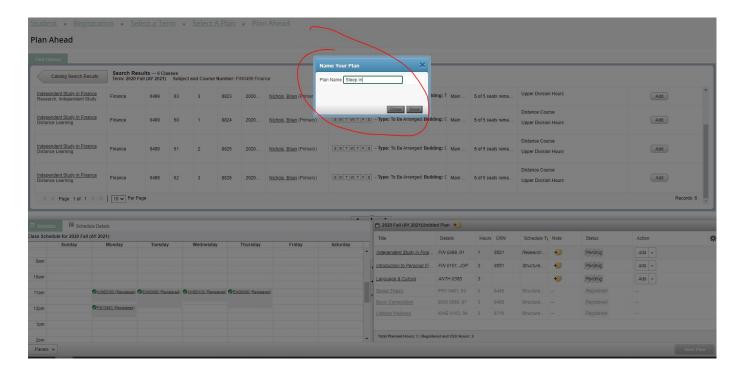
Type the note and click the "save" button:



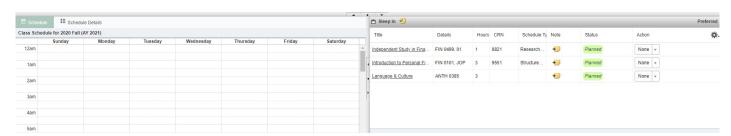
When all notes have been entered and all classes have been added, click the Save Plan button:



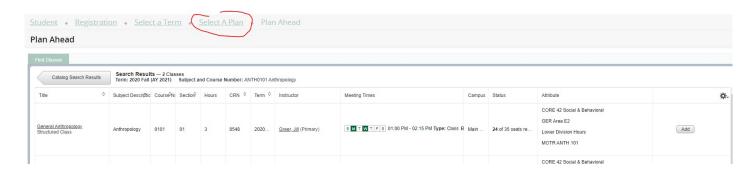
A pop up box will appear. Enter the name of the plan and click **Save**. If the user does not enter a name for the plan before clicking save, a name is automatically assigned (such as Class Schedule for Registration Fall 202080). Plans may be edited after they have been saved.



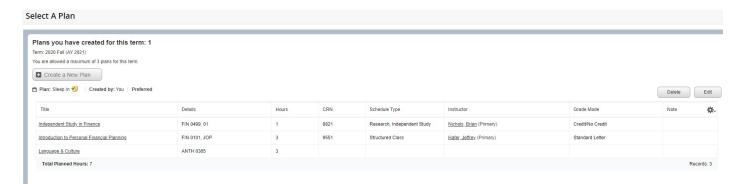
The plan will be shown at the bottom of the screen with a **Planned** status:



To add more plans, click on **Select a Plan** at the top of the screen:



The following screen will be displayed. The number of existing plans will be shown and a list of courses that make up each plan will be shown:



Repeat the process to create more plans if desired. Plans are limited to a maximum of three per term.