Accessing the Udirect degree planning application

- From the Audit Request page, clicking on the Plans tab will take you to the manage and create plans screen for yourself if you are a student, or for the selected student if an advisor.
How to create a new plan

- Click on the “Create a new Plan” button to bring up the menu.
- Navigate through the menu to your desired program of study.
- Click on your desired program to create your individualized plan.
After clicking on the link to your program you will see the screen below.

- Give your plan a name, select the semester you anticipate starting your program of study, the 4 digit year, and select how many years you anticipate it will take you to graduate in that program.

**Manage Pistol Pete's Plans**

Enter Plan Information Here:

- **Chosen roadmap:** BBA - Finance, effective Summer 2014, for 4 Years
- **Plan Name:** My Finance Plan
- **Semester:** Fall (40)
- **Year:** 2015
- **Years To Graduation:** 4

<table>
<thead>
<tr>
<th>Preferred</th>
<th>Name</th>
<th>Action</th>
<th>Updated</th>
<th>User</th>
<th>PDF</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>my auto plan</td>
<td>Select an Action...</td>
<td>Jan 14, 2015</td>
<td>pete</td>
<td>PDF</td>
</tr>
</tbody>
</table>

* Indicates a plan without associated roadmap
• Click the “Add Plan” button when you are ready to create your plan.
• The following screen will appear, under the “Action” menu drop downs you can view and edit your plan, as well as give your plan a different name, create a copy, and delete your plan.
• The “Preferred” radio button is just for your information as a way to mark your preferred plan of study that you are following in case you have multiple plans that have been created.
• As an option, personal notes can be added on this page, and linked with an individual plan if desired. The note can be marked private, or shared with advisors.
Viewing and editing a current plan

- If you wish to view and edit a current plan, select the “Edit Your Plan” option from the drop down menu on the following screen which will appear if you click on the Plans tab if you already have created at least one plan.
- If you need to create a plan, please see the section on creating a plan.
• The ideal roadmap for the degree program is on the left, the individual student plan is on the right. Requirements marked with a green checkmark are already complete with coursework.
• All terms on both the roadmap and plan can be collapsed and expanded. Clicking on a course will bring up the course description.
• Students can create individualized plans by dragging and dropping courses on the roadmap into the semester on their plan that they anticipate taking the course, also in order to drop a course on a term, the course needs to be dragged over onto the term, the term will be highlighted blue when the course can be added.
In addition to adding courses to plans by dragging and dropping, any course can be added by clicking on the “+” icon within a semester and typing the course in manually. The text boxes will auto-fill with course information based on partial searches.

This can be used to add courses to the plan that do not appear on the roadmap that the student needs to take, such as elective courses or developmental courses.
• Courses can also be removed from the student’s plan by clicking on the edit button for the desired term, select the desired course or courses to be deleted, then click on the delete button.
• In addition, the entire term can be deleted from the plan by clicking the trashcan button.
**Explanation of Roadmap and Plan Icons**

Descriptions on the functionality of the icons can be viewed by hovering over the icons.

For the Roadmap:

- Click on the PDF icon to view the Roadmap in a PDF format.
- Click on the “+” icon to attach another roadmap, for example if the student is pursuing a double major, getting a minor, additional roadmaps can be added to the plan.

<table>
<thead>
<tr>
<th>Roadmap: BBA - Finance</th>
<th>74 Hours</th>
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<tbody>
<tr>
<td>Program: BBA - Finance</td>
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<tr>
<td>Effective: Summer 2014</td>
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<tr>
<td>Expand All / Collapse All</td>
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**Freshman Year**

<table>
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<tr>
<th>Fall Semester</th>
<th>3 Hours</th>
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</table>

- Take MATH 120 0 Hours
- Take BCIS 110 or CS 110 0 Hours
- Area I: Communications 0 Hours
- Take 3 credits of Area V: Humanities and Fine Arts 0 Hours
- Take 3 credits of general electives 3 Hours

**Spring Semester**

| 0 Hours |

**Sophomore Year**

| 15 Hours |
For the Plan:

- Clicking on the pie graph icon will bring up a degree audit, including both real coursework and courses added on the plan.
- Clicking on the PDF icon will display a pdf version of the student’s plan, in addition to the student’s academic history.
- Clicking on the chain link icon will allow the user to navigate back and forth between multiple roadmaps if additional roadmaps were linked to the plan by clicking on the “+” icon on the roadmap side.
- Clicking on the list icon will list the plan as well as the student’s academic history, clicking the list icon again will return the user to plan and roadmap view.
- Clicking on the conversation bubble will list the plan and any notes associated with the plan, clicking the icon again will return the user to the previous screen.
- Clicking on the checkmark will run a degree audit behind the scenes to check that courses planned are fulfilling degree requirements.
- Clicking on the “-“ icon will remove all planned courses from the plan.
- Clicking on the “+” icon will allow the user to add additional terms to the plan.

<table>
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<th>Plan: My Finance Plan</th>
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<tr>
<td><strong>Fall 2015</strong></td>
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<tr>
<td><strong>Spring 2016</strong></td>
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<tr>
<td><strong>Summer 2016</strong></td>
<td>0 Hours</td>
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<tr>
<td><strong>Fall 2016</strong></td>
<td>0 Hours</td>
</tr>
<tr>
<td><strong>Spring 2017</strong></td>
<td>0 Hours</td>
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