Planning Your Schedule in Banner 9

Created: February 2020
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What is Schedule Planning?
Schedule Planning is a new feature of Banner 9 that allows you to build possible schedules in advance of registration. Your advisor may approve your plans as well as create plans for you; each school of study has its own procedures for working with student plans. When your time ticket for registration opens, you can register more quickly by registering from your plans.

**Note:** Saving a class on your plan does not guarantee you will be able to register for it. No registration errors (e.g., prerequisites, time conflicts, etc.) are checked when you add a class to your plan. Error-checking only occurs upon the SUBMIT at the time of registration. See the *Self-Service Registration in Banner 9* manual, particularly the sections “Plans” and “Submitting Your Registration” for instructions for registering from your plan.

Accessing Banner 9 Schedule Planning
Banner 9 schedule planning can be accessed by choosing *Registration and Planning* from the Student Profile menu. The Student Profile is accessed in DORI, by clicking on *Self-Service Banner > Student Information > Enhanced Self-Service Banner (Version 9).*

To view or create schedule plans, choose *Plan Your Schedule.*
Choosing the Term
You will be prompted to select a term for planning. Choose the appropriate term from the drop-down box and click CONTINUE.

Creating a Plan
To begin creating a new plan, click CREATE A NEW PLAN.

Planning Panels
The Plan Ahead page will open with the Schedule panel grid and Plan listing minimized. You can open the Schedule and Plan panels by clicking on the PANELS button, as directed by the informational message. You can close this message by clicking on the X. If you choose not to expand your panels at this time, they will expand automatically when you add your first class to your registration plan.
The planning panels are:

- **Find classes panel (top)**: This is where you search for the classes to add them to your plan.
- **Schedule panel (bottom left)**: This displays a weekly grid or list view of the classes that are either saved on your plan or pending.
- **Plan panel (bottom right)**: This displays any classes you have already saved to your plan or have been added but not yet saved. The current status is displayed, along with an Action column. A **SAVE PLAN** button is below the Plan panel.
The process of adding classes to your plan consists of:

- Using the Find Classes panel to search for classes, view and select specific sections, and add class sections to your plan
- Saving your plan

Adding Classes to Your Plan

Use the default basic search or Advanced Search to search for classes to add to your plan. See the *Searching for Classes in Banner 9 Registration* manual or video for more details on searching for classes.

In the below example, the search is for SOCI 101:

If any of the classes in your search results are listed with the message “NOT OFFERED FOR TERM”, you will be unable to add them to your plan as they are not offered in the plan term. Classes that are available to be added to your plan will have two buttons next to them: View Sections and Add Course.

Click View Sections to view the actual offerings of that class in the term.

Note: If you choose Add Course, the general course will be added to your plan, but it will not be a specific section offering with a particular meeting time. When you attempt to register from the plan, you will need to view the available sections and pick one at that time. It is recommended that you choose
VIEW SECTIONS to select a specific section while building your plan in advance of registration so that you can register more quickly when your time ticket opens.

Click the ADD button next to the section that you wish to add to your plan.

The class will be added to the Schedule panel grid in gray and added to the Plan panel listing with a status of “Pending”. Be certain to check the grid for overlapping meeting times as you add sections. Overlapping meeting times result in errors and will prevent registration.
To execute another search for the next class, click **CATALOG SEARCH RESULTS** and then the green **SEARCH AGAIN** button.

When you are ready to save the plan, click **SAVE PLAN** at the bottom right in the Plan panel. Enter the name of your plan and click **SAVE**.

You will receive a “Save Successful” message, and the name in the Plan panel will change from the default Term-Untitled plan to your plan name. In addition, the status of your classes on the plan will change from “Pending” to “Planned” and will be shown in a solid color with a green checkmark in the Schedule panel grid.
You can now continue to add or remove classes from your plan, add notes, or you can return to the Select a Plan or Registration page using the breadcrumb navigation.

**Note:** Errors such as time conflicts, pre-requisites, and closed classes are not checked during planning. These will be checked upon the SUBMIT during registration. Planning will also not restrict the number of credits you can add to your plan, so be mindful of maximum credits.

### Removing Classes from Your Plan

To remove a class from your plan, find the class in the Plan panel. Change the Action column to “Delete” and click SAVE PLAN. You will receive a “Save Successful” message, and the class will be removed from your plan.

![Plan Panel with Action Column Changed to Delete](image)

### Viewing or Editing Your Plan

To view the details of, or add or remove classes from, a plan you have previously saved, select the term and proceed to the Select A Plan page. Click the EDIT button for the plan you wish to view or change.
Adding Notes to Your Plan

Notes can be added to your plan on the Plan Ahead page while you are initially building the plan or by editing the plan using the procedures in “Viewing or Editing Your Plan” above.

Plan-level Notes

You can add overall comments to the plan as a whole. These are limited to 80 characters. **Warning:** Although the system will allow you to keep typing more than 80 characters, after saving the comment, it will be cut off after the first 80 characters.

Click the “note” icon next to your plan name, enter your brief comments and **Save**.

You will get a message that the note was saved and the “note” icon will have a green checkmark by it. You can click on the icon to see your notes.
Class-level Notes
Class-level notes do not have an 80 character limitation. Click the “note” icon next to the particular course, enter your notes and SAVE.

You will get a message that the note was saved and the “note” icon will have a green checkmark by it. You can click on the icon to see your notes.

Marking a Plan as Preferred
You can register from any of your plans, whether it is your preferred plan or not. The benefit to having a preferred plan is that it will be the first plan displayed in the list when you elect to register from a plan, making it easier to find.

If you have created only one plan, that plan is your preferred plan by default. After you have created at least one additional plan, you can mark a different plan as preferred. On the Select A Plan page after choosing the planning term, find the plan you want to make preferred and click on the “Make Preferred” link.
You will receive the message “Plan made preferred.” and your list of plans will be re-sorted so that the newly preferred plan is listed first.

**Plans and Your Advisor**

Your advisor is able to view your plans (including your notes) and mark them as approved for registration. Your advisor can also create plans for you. Different schools of study have different processes for working with student plans; you should consult your advisor if you have questions about how they will work with your plans.

**Approved Plans**

If your advisor has approved your plan, it will display on the Select A Plan page.
Advisor-Created Plans

Advisors can also create suggested registration plans for you, which you can view on the Select A Plan page. If your advisor put notes on the plan or courses, the “notes” icon will have a green checkmark. You can click on the “notes” icon to view the notes.