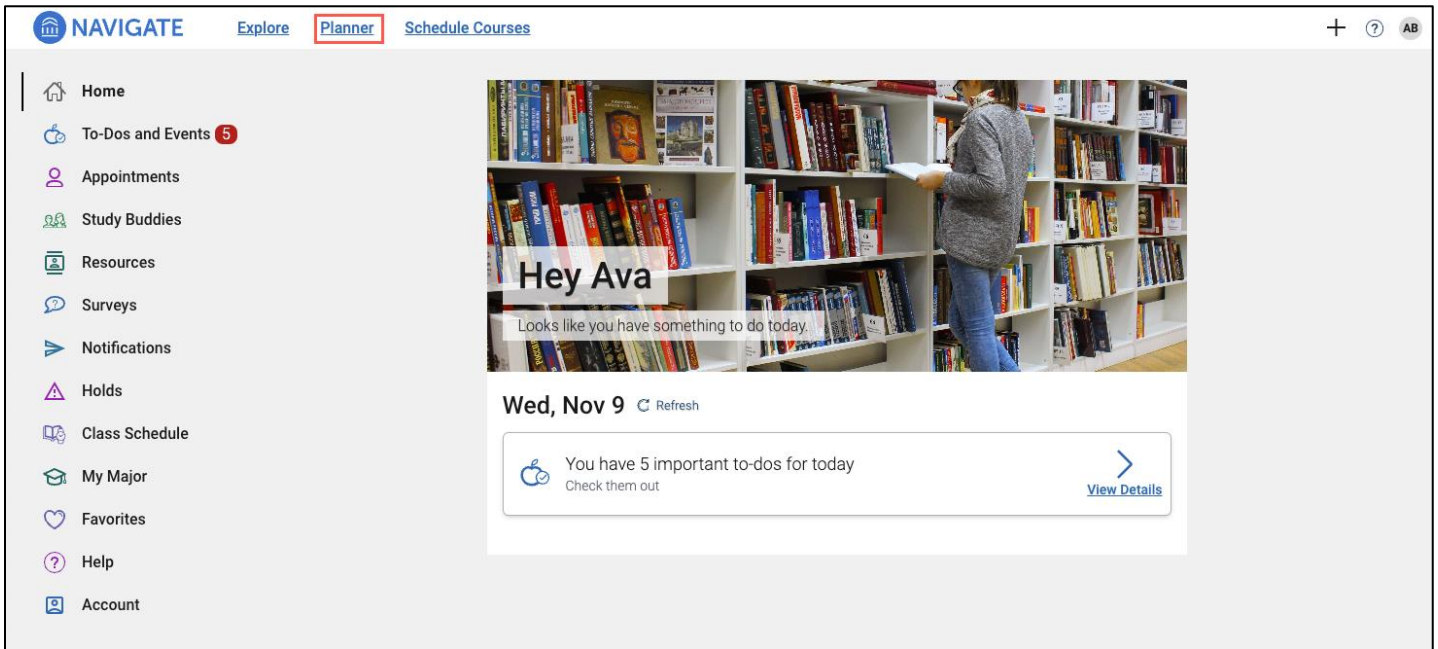


Student Access to Academic Planning

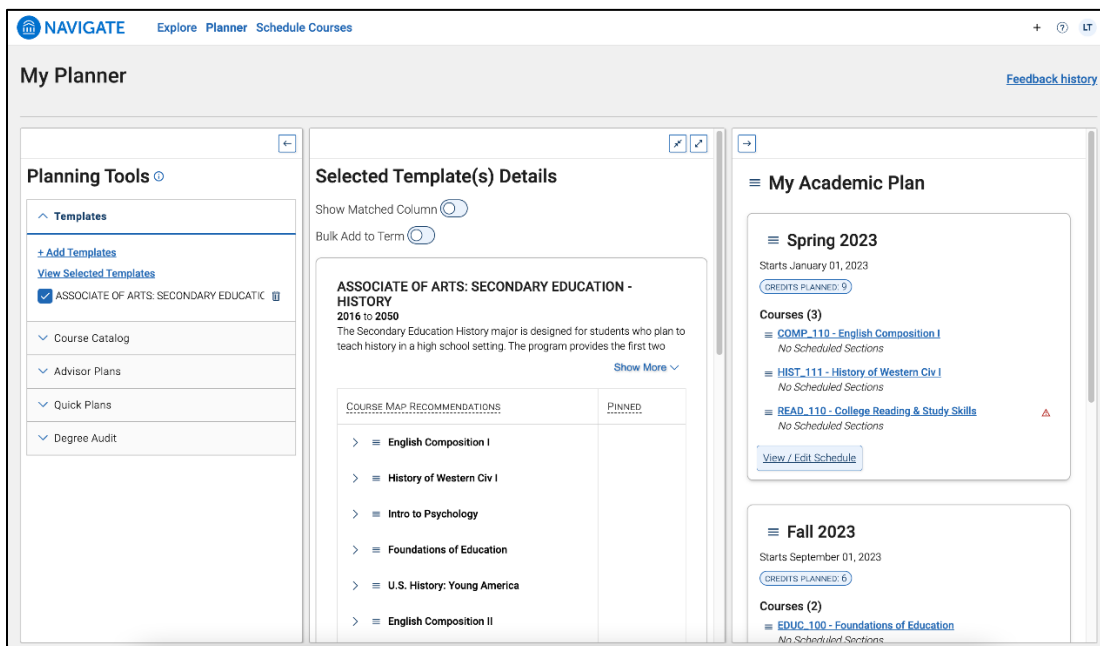
Students access Academic Planner by clicking **Planner** on the desktop version of Navigate Student.



A guide has been added to Planner to provide students with an overview of academic planning features. It contains all the major steps a student needs to take to successfully create a plan, including selecting a template, adding courses to a plan, and accessing advisor plans, along with animated gifs to help visualize the process. This guide shows to students the first time they open the Next Generation planner.

Academic Plan

Below is the **My Planner** page that appears when the student accesses the Planner. Note that the example is of a student who has previously begun using the Academic Planning tool.



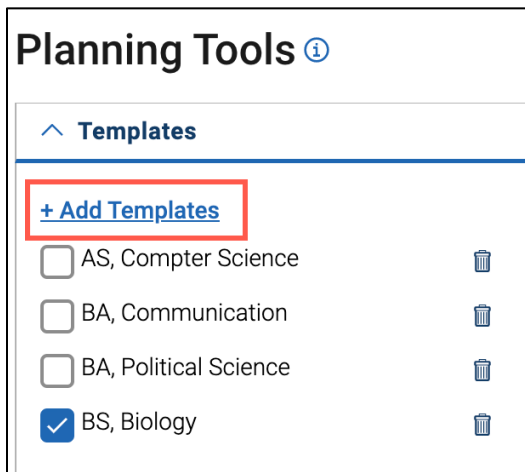
Students can expand or collapse the left and right panels in the Planner. The center panel can be expanded to fill the entire screen or reduced to its normal size.

My Planner has three panels.

- **Planning Tools.** This part of Academic Planner contains template plans the student has added, the ability to search for courses in the course catalog, links to advisor plans that have been sent to the student, and links to Quick Planner and any Quick Plans the student has created. If configured, students can also access a link out to the institution Degree Audit.
- **Selected Template Details.** The center panel shows the student's selected template by default. This panel will populate with the course search, Quick Plans, or Advisor Plans when the student selects one of those from Planning Tools. Students can expand or collapse all slots on this panel when reviewing a template.
- **My Academic Plan.** This panel shows the terms students have added to their plan as well as any courses or placeholders added to the terms. If your institution has Course Scheduling, they can go from My Academic Plan to the scheduler. Remind students that planned courses in Academic Planner are neither scheduled nor registered.

Adding a Template

To add a template and create a plan from the template, the student clicks **Add Template** in the Templates section of Planning Tools.



A list of templates appears in the center panel. Templates that match the student's current academic goal(s) and catalog year will be indicated with a green star in the **Recommended** column and appear at the top of the list.

To add a template from the list, the student clicks the **Add to My Templates** button. The student can also search for a template using the search bar.



Add Additional Templates

Select templates from the All Templates list to add to "Your Templates". You can add or remove any template from "Your Templates". Templates recommended to you will be indicated with a star icon.

Template Search (by keyword)

e.g. Master

TEMPLATE	CATALOG YEAR	RECOMMENDED	ACTIONS
22.12	212225 - 212226	☆	+ Add to My Templates
22.9 major template	2022 - 2025	☆	+ Add to My Templates
22.9 Minor template	2022 - 2025	☆	+ Add to My Templates
Aerospace	2015 - 2055	☆	+ Add to My Templates
Assoc Arts Heritage Intrp	2022 - 2030	☆	+ Add to My Templates
ASSOCIATE OF ARTS: FINE ARTS	2015 - 2050	☆	+ Add to My Templates
ASSOCIATE OF ARTS: HEALTH AND PHYSICAL EDUCATION Specialization	2021 - 2050	☆	+ Add to My Templates
ASSOCIATE OF ARTS: JOURNALISM	201520 - 205050	☆	+ Add to My Templates

Templates a student has previously added to their list will be grayed out and unavailable for the student to add.

ACTIONS

[+ Add to My Templates](#)

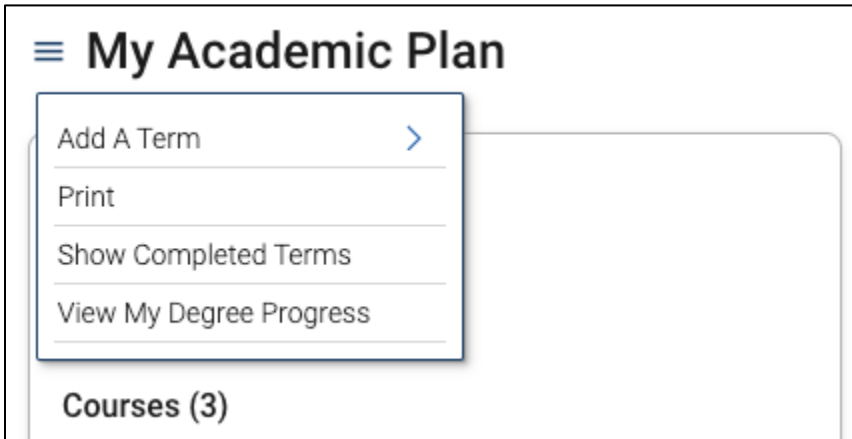
Once a template is added to the student's list, a success growler appears and they can continue planning. Students can also delete a template from their list.

After adding templates, students also see a link to View Selected Templates. If students select or deselect a checkbox, the Selected Templates Details update in the center panel. These selections are saved and will persist so that students will see them when they log in again.

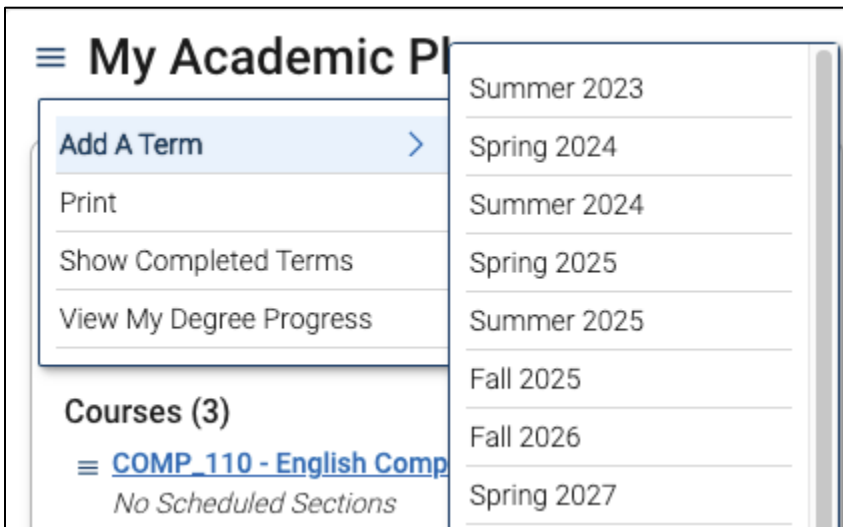
Note. Unlike in legacy Academic Planner, students can choose multiple templates in next-generation Academic Planner, including templates for academic goals they are not currently declared in. Each template is associated with at least one academic goal, which includes majors, programs, minors, concentrations, college, level, and degree.

Adding Terms to a Template

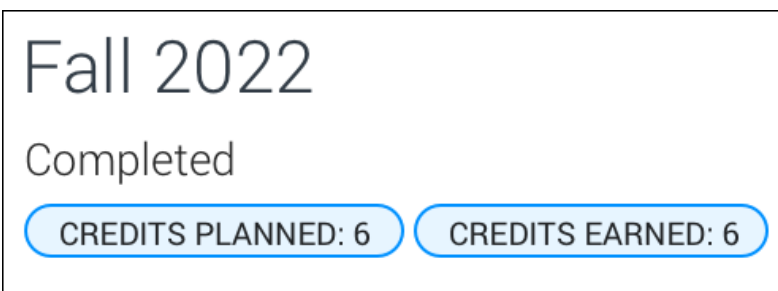
If the student is not using Quick Planner, they will want to add terms to their Academic Plan. To add a term, the student goes to the **My Academic Plan** panel and selects **Add a Term** from the menu.



A list of terms appears below the button. The student then selects a term and it is added to the plan.



Students can then plan courses for the term, schedule courses if your institution has Course Scheduling, or remove the term. They can also see credits planned for a term and if a term is finished, the credits earned.



An example of a term with planned courses and placeholders is shown below, along with the View/Edit Schedule button. Students can also remove the term or open Course Scheduler using the hamburger menu in the term card.

☰ Summer 2023

Starts May 01, 2023

CREDITS PLANNED: 3

Planned Placeholders (2)

- ☰ sg1 ⓘ
- ☰ Testing to check NCR ⓘ

ⓘ Select courses to continue with scheduling and registration

Courses (1)

- ☰ [MGMT_200 - Organizational Behavior](#) ⚠

No Scheduled Sections

[View / Edit Schedule](#)

Adding Courses to an Academic Plan

Important. Adding courses to an Academic Plan does not mean the student has scheduled or registered for those courses.

Next Generation Academic Planner uses template slots on academic templates. Some slots will have more than one course that fulfills it (known as a course group in legacy Academic Planner), and some will have only one. Additionally, search groups and non-course requirements can be added to templates in Next Generation Academic Planning to allow students to plan them.

Selected Template(s) Details

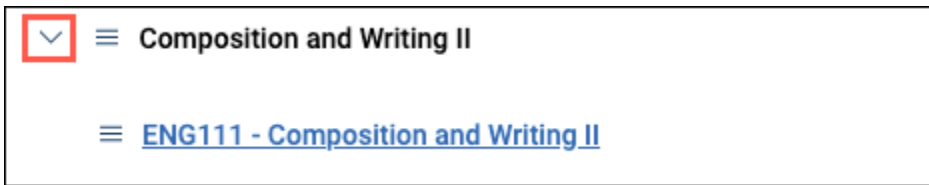
Show Matched Column off Bulk Add to Term off

AS, Computer Science

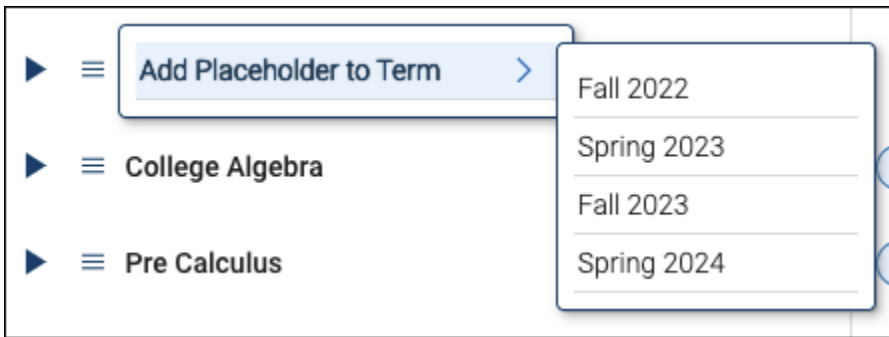
2019 to 2022

COURSE MAP RECOMMENDATIONS	PINNED
> ☰ Composition and Writing I	<input checked="" type="checkbox"/> MARKED AS MET
> ☰ Composition and Writing II	
> ☰ Creative Writing	
> ☰ College Algebra	
> ☰ Pre Calculus	
> ☰ Calculus I	
> ☰ Calculus II	

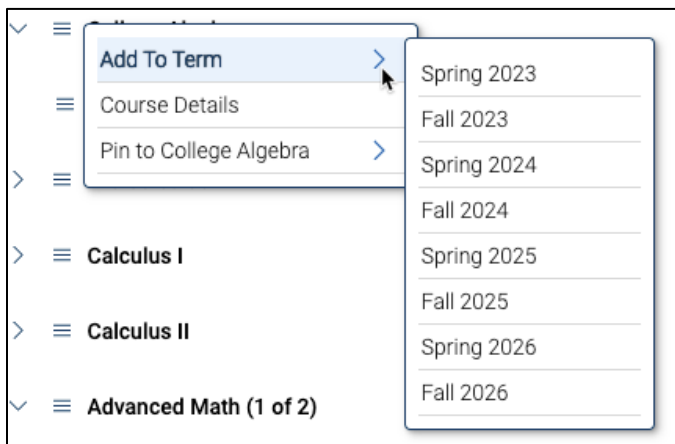
To see what courses fulfill the template slot's requirements, students click the arrow next to a slot to expand.



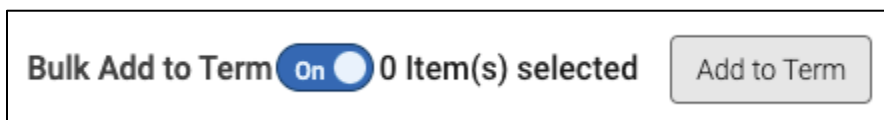
Students have a choice when making their plan. They may choose to add a particular course to a plan, or they can add the slot as a placeholder and select the actual course later when they schedule and register for courses. To plan the placeholder, they select the hamburger menu next to the slot name and select a term after selecting **Add Placeholder to Term**.



To add a specific course in an academic plan, click the arrow and expand the slot. The list of courses will appear. Click the hamburger menu next to the course to add, click **Add to Term**, then select a term from the dropdown that opens.



Students can also bulk add courses to a single term. First, toggle **Bulk Add to Term** on.



Check boxes for any courses and/or placeholders you want to add for a single term. Then, choose a term that appears when you click **Add to Term**. Students must have first added these terms to their My Academic Plan to appear as options in **Bulk Add to Term**.

Show Matched Column off Bulk Add to Term On 2 Item(s) selected Add to Term

AS, Computer Science
2019 to 2022

COURSE MAP RECOMMENDATIONS

<input type="checkbox"/>	>	≡	Composition and Writing I	
<input type="checkbox"/>	∨	≡	Composition and Writing II	
<input type="checkbox"/>		≡	ENG111 - Composition and Writing II	
<input type="checkbox"/>	>	≡	Creative Writing	
<input type="checkbox"/>	∨	≡	College Algebra	
<input checked="" type="checkbox"/>		≡	MATH101 - College Algebra	
<input checked="" type="checkbox"/>	>	≡	Pre Calculus	
<input type="checkbox"/>	>	≡	Calculus I	
<input type="checkbox"/>	>	≡	Calculus II	

Spring 2023
Fall 2023
Spring 2024
Fall 2024
Spring 2025
Fall 2025
Spring 2026
Fall 2026

Students can use the **Pinned** column to assign courses to a particular template slot. Each course may only be pinned once per template. Students can add a course to a plan without pinning it. After the course is planned, it will display in the Pinned column with the term it has been planned in.

Selected Template(s) Details

Show Matched Column off Bulk Add to Term off

BA, Education
2019 to 2022
Education program

<u>COURSE MAP RECOMMENDATIONS</u>	<u>PINNED</u>
∨ ≡ Composition and Writing I	<input checked="" type="checkbox"/> COMPOSITION AND...
≡ ENG101 - Composition and Writing I	<input checked="" type="checkbox"/> SPRING 2023

Students can use Pins to track if the same course can be satisfied by multiple recommendations if this feature is active at your institution. In this example, both PHYS120 and BIO101 are options to fulfill the Science Core I

recommendation. The student **Pinned** PHYS120 to Spring 2025, indicating that course will be used for this recommendation.

<u>COURSE MAP RECOMMENDATIONS</u>	<u>MATCHED</u>	<u>PINNED</u>
▼ ≡ Science Core I	2 Course(s) Matched	✓ Special Relati...
Course recommendations for fulfilling Science Core requirement		
≡ PHYS120 - Special Relativity	Spring 2025	✓ Spring 2025
≡ BIO101 - Intro to Biology	Spring 2025	
≡ BIO150 - Biodiversity		
≡ CHEM120 - Principles of Chemical Energy		
≡ PHYS111 - General Physics II		
≡ CHEM111 - Principles of Chemicals		
≡ BIO111 - Cellular Biology		

This allows BIO101 to be used for a different recommendation, Biology I

▼ ≡ Biology I	1 Course(s) Matched	✓ Intro to Biology
Course recommendations for fulfilling Biology I requirement		
≡ BIO101 - Intro to Biology	Spring 2025	✓ Spring 2025

The student must unpin BIO101 from the Biology I recommendation if they would instead like to pin it to the Science Core I recommendation.

To help students understand what slots and courses they've already planned, students can toggle on the **Show Matched Column**. Matched courses are any courses that a student has completed, registered, or planned. The term in which that course was completed, registered, or planned is shown.

NAVIGATE Explore Planner

My Planner

Planning Tools

- Templates
 - + Add Templates
 - View Selected Templates
 - ASSOCIATE OF ARTS: SECONDARY EDUCATIC
- Course Catalog
- Advisor Plans
- Quick Plans
- Degree Audit

Selected Template(s) Details

Show Matched Column

Bulk Add to Term

ASSOCIATE OF ARTS: SECONDARY EDUCATION - HISTORY
2016 to 2050

The Secondary Education History major is designed for students who plan to teach history in a high school setting. The program provides the first two years of an undergraduate degree

[Show More](#)

COURSE MAP RECOMMENDATIONS	MATCHED	PINNED
> English Composition I		
> History of Western Civ I		
> Intro to Psychology	1 COURSE(S) MA...	
> Foundations of Education	1 COURSE(S) MA...	
> U.S. History: Young America		

Courses Not Offered

Courses Not Offered is a feature that is meant to accommodate situations where students have valid course work in their history that can match to a template but is not available for current and future students to plan. Students who have not taken the course will be prevented from viewing, searching for, or planning these Courses Not Offered in current and future terms, but students who have taken the course will see these courses as matched in a template and listed on their Academic Plan.

If a student has taken a course that is not offered, they will see a shown on their plan indicating that it is no longer offered to plan for current or future terms. If a student planned any courses that were later marked as not offered, this icon will appear, preventing the student from planning it to any other term.

≡ Spring 2023

Starts January 01, 2023


CREDITS PLANNED: 19 CREDITS EARNED: 3

Planned Placeholders (2)

- ≡ Arts and Humanities ⓘ
- ≡ health search grp ⓘ

ⓘ *Select courses to continue with scheduling and registration*

Courses (8)

- ≡ [10006 - Cabinetmaking](#) ⚠️ 
No Scheduled Sections
- ≡ [10063 - Neuroscience of Psychology](#)
No Scheduled Sections
- ≡ [10066 - Webcast News Production](#) ⚠️
No Scheduled Sections
- ≡ [10508 - Biomanufacturing](#) ⚠️
No Scheduled Sections

Students can also see a non-offered course in Selected Template Details.

Selected Template(s) Details

Show Matched Column

Bulk Add to Term

ASSOCIATE OF ARTS: MUSIC
2015 to 2050

The Music major, which is designed to prepare students for transfer in Music to four-year institutions, is a curriculum that culminates in an Associate of Arts degree. Numerous courses in the program fulfill Core Curriculum requirements for

[Show More](#) ▾

COURSE MAP RECOMMENDATIONS	MATCHED	PINNED
<ul style="list-style-type: none"> ≡ Music Theory I ≡ MUSC_111 - Music Theory I > ≡ Far Training I 	<p>This course is not offered to plan. MATCHED</p> <p>ⓘ SPRING 2023</p>	

≡ My Academic Plan

≡ Spring 2023

Starts January 01, 2023

CREDITS PLANNED: 10

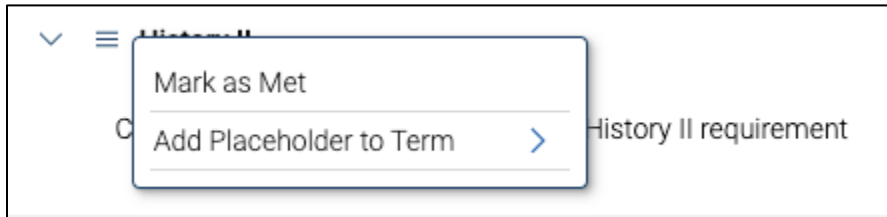
Courses (3)

- ≡ [1011 - Cooperative Education: Women's Studies](#) ⓘ
Section: 21114 - Registered
- ≡ [BIOL_101 - Biological Science I](#)
No Scheduled Sections
- ≡ [MUSC_111 - Music Theory I](#) ⚠️ ⓘ
No Scheduled Sections

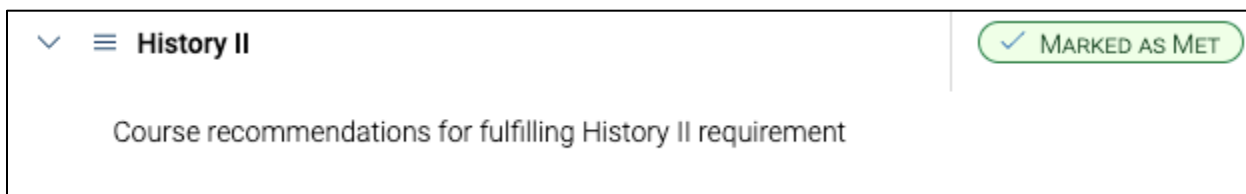
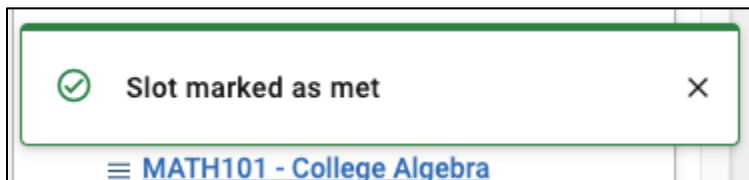
[View / Edit Schedule](#)

Mark as Met for Template Slots

For template slots students have fulfilled in other ways (transfer courses, exams), students can mark a slot as met. To do so, click on an open slot and select **Mark as Met**.



When a student clicks **Mark as Met**, a growler appears and the slot is listed as being marked as met in Selected Template Details.

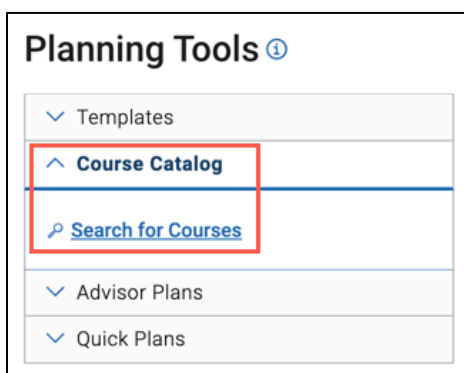


Advisors can also see courses students have marked as met in Shared Workspace. Students can also change a slot from marked as met to marked as unmet. When they do this, the previous status is deleted.

Searching for Courses to Add to a Plan

If a student wants to add a course to their plan that is not included in the template, they can search the Course Catalog, which is in the Planning Tools section.

To begin, students select **Search for Courses**.



A search page with various filters appears in the center panel. An example of how these filters might look is shown below.

Search Courses


Search by Keyword ⓘ

Course Code ⓘ

Subject ⓘ

Department ⓘ

Title



Enter a keyword to search a course title or description.
Try searching for e.g. Psych, Psychology, or Intro to Psych

The search is an AND search. When searching by more than one attribute, the search looks for courses that meet ALL of the attributes, not ANY of the attributes. For fields with large numbers of options where a user could want to make one or more selections (e.g. a department field), a user can type the beginning of the field value, select it, and then make more selections.

Important. The maximum number of search results that can be loaded using this search is 7000. Only 500 of those results show. If there are more than 500 results, we strongly recommended adding more information to find the information they want.

After searching, results appear. Students can add results to a term by selecting a course and clicking the **Add to Term** button, before or after choosing a term.

2
results found None selected

Choose a t...

<input type="checkbox"/>	CODE ⓘ ↕	TITLE ⓘ ↕	CREDITS ⓘ ↕
<input type="checkbox"/>	ENG111	Composition and Writing II	3
<input type="checkbox"/>	ENG101	Composition and Writing I	3

K < 1 > >|

Reviewing Advisor Plans

In Next Generation Academic Planning, advisors are able to create full **Advisor Plans** for students. This is different from legacy Academic Planner, where advisors made suggestions on a student's plan for the student to accept. Advisors can create as many plans as they like, which are visible on the list of **Advisor Plans**, which can be found in Planning Tools. Students can see all sent advisor plans and may not delete advisor plans.



Planning Tools ⓘ

- Templates
- Course Catalog
- ^ Advisor Plans**

[Ava Edits](#)
 by jwhitten@woodley.edu
 jwhitten@woodley.edu
 Sent: May 11, 2022 01:11 PM

- Quick Plans

When a student selects an Advisor Plan, it appears in the center panel.

≡ Advisor Plan: May 12 2023, 02:34 PM

By: AB de villiers
On: May 24, 2023 01:31 PM
The following list was created using the course catalog, other advisor plans, and the template(s):
ASSOCIATE OF ARTS: HEALTH AND PHYSICAL EDUCATION Specialization and Aerospace. These courses and placeholders organized by term are suggestions your advisor recommends you plan.

Show Matched Column

Bulk Add to Term 0 Item(s) selected

Fall 2023

COURSES AND PLACEHOLDERS	TEMPLATE
<input type="checkbox"/> ≡ 11261 - Health Info. Technical Applications	ASSOCIATE OF ARTS: HEALTH AND PHYSICAL...

Summer 2024


COURSES AND PLACEHOLDERS	TEMPLATE
<input type="checkbox"/> > ≡ Dolore	ASSOCIATE OF ARTS: HEALTH AND PHYSICAL...
<input type="checkbox"/> > ≡ Quis	ASSOCIATE OF ARTS: HEALTH AND PHYSICAL...

Students can add individual slots and bulk add slots to terms from Advisor Plans just as they can from Quick Plans and other templates. The student can also see if the advisor recommendations are matched in their plan by turning the *Show Matched Column* on.

If an advisor has added comments on the course, placeholder, term, or plan level, these are visible by clicking the comment icon.

Fall 2023

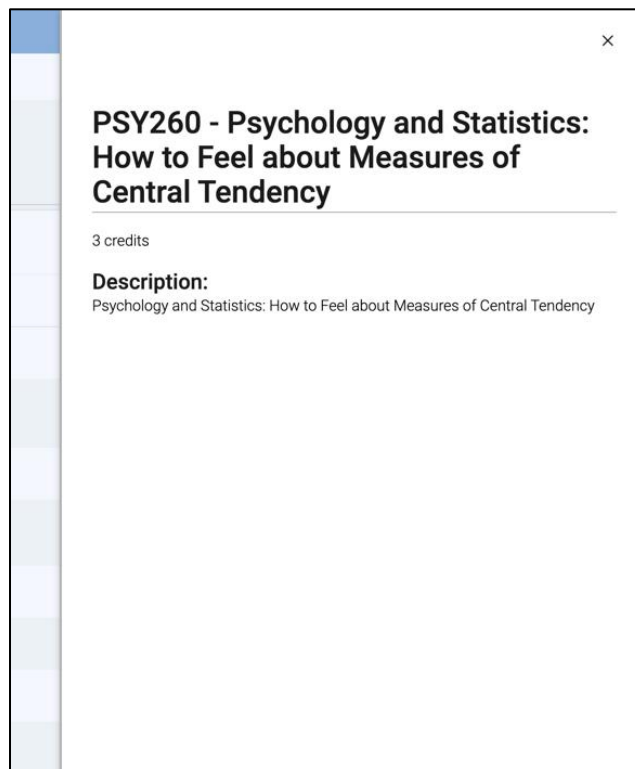
COURSE MAP RECOMMENDATIONS

- ≡ [MATH201 - The Calculus I](#)
- ≡ [MATH250 - The Calculus II](#)
- ≡ [BIO270 - Animal Biology](#) 
- > ≡ Advanced Math (1 of 2)
- > ≡ Advanced Math (2 of 2)
- > ≡ Humanities (1 of 3)



As with other options, students can open a placeholder entry to see the courses that match the requirements of that placeholder or search for courses that meet the requirement.

Students can see details about a course by selecting Course Details from the menu, which causes a panel to appear with more information. They close the details by clicking the **X**.



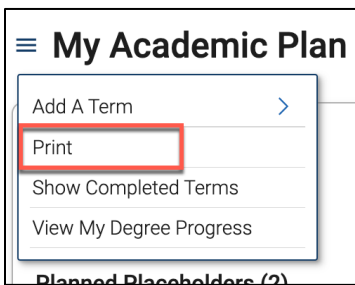
If a student has already planned a course from the recommendations, it shows in the Matched column.

Spring 2029		
COURSES AND PLACEHOLDERS	MATCHED	TEMPLATE
<ul style="list-style-type: none"> BIOL_101 - Biological Science I 	<ul style="list-style-type: none"> SPRING 2024 	<ul style="list-style-type: none"> AEROSPACE

This makes it easier for students to understand what advisor recommendations already match with their Academic Plan.

Printing A Plan

Students can print their planned and completed terms by selecting **Print** from the My Academic Plan menu.



The student can print the plan that opens or save it as a PDF.

My Academic Plan

Spring 2023
Planned Placeholders (2)
 Humanities (1 of 3)
 Science Core I

Courses (3)
[ACCT101 - Beginning the Accounting Journey](#)
 Section: 1 - Scheduled
[ENG101 - Composition and Writing I](#)
 Section: 1 - Scheduled
[MATH101 - College Algebra](#)
 Section: 1 - Scheduled

Fall 2023
Planned Placeholders (3)
 History I
 Creative Writing
 Science Core II

Courses (2)
[ACCT201 - Managerial Accounting](#)
 No Scheduled Sections
[ENG111 - Composition and Writing II](#)
 No Scheduled Sections

Spring 2024
Planned Placeholders (1)
 Biology II

Courses (4)
[CHEM101 - Intro to Chemistry](#)
 No Scheduled Sections
[FREN201 - French II](#)
 No Scheduled Sections
[MATH201 - The Calculus I](#)
 No Scheduled Sections
[PSY101 - Psych: An Introduction](#)
 No Scheduled Sections

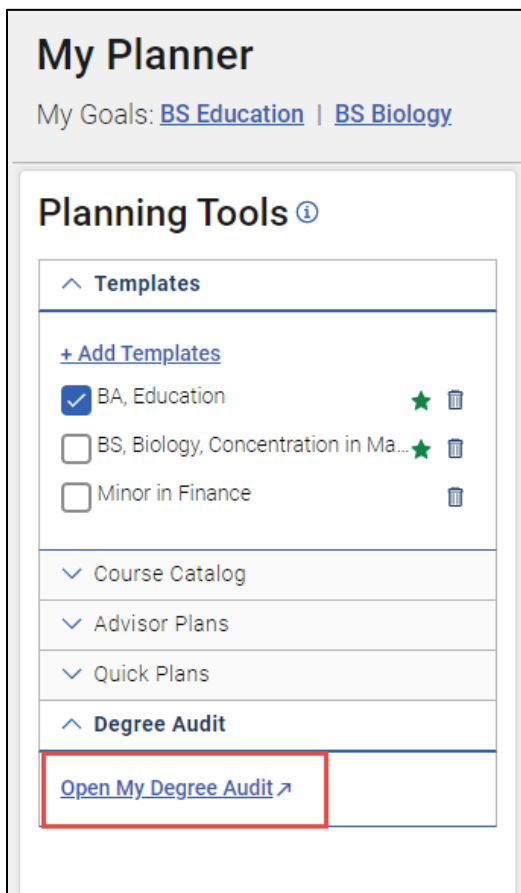
Feedback History

Students use **Feedback History** to view legacy Academic Planner suggestions and changes to their plan. The feedback log includes the date and time associated with a change and who made the changes. Students can print their feedback history by clicking the **Print** button. If the student had not received suggestions in legacy Academic Planning, the Feedback History will be blank, as all Next Generation AP advisor feedback will appear in Advisor Plans in the Planning Tools column.

Degree Audit

Note. Work with Navigate Technical Support to enable this feature. Degree Audit requires your institution to provide URL information.

Students can open their institution's degree audit page from Academic Planner by clicking **View My Degree Progress**. To configure this, reach out to NavigateTechSupport@eab.com with the Degree Audit URL for your institution.



The screenshot shows the 'My Planner' interface. At the top, it says 'My Goals: [BS Education](#) | [BS Biology](#)'. Below this is the 'Planning Tools' section, which is expanded to show a list of templates. The 'Degree Audit' section is highlighted with a red box, and the link 'Open My Degree Audit' is also highlighted with a red box.

My Planner
My Goals: [BS Education](#) | [BS Biology](#)

Planning Tools ⓘ

^ **Templates**

+ [Add Templates](#)

- BA, Education ★ 🗑️
- BS, Biology, Concentration in Ma... ★ 🗑️
- Minor in Finance 🗑️

∨ Course Catalog

∨ Advisor Plans

∨ Quick Plans

^ **Degree Audit**

[Open My Degree Audit](#) ↗