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.

![Planning Tools](image)

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)**

<table>
<thead>
<tr>
<th>Template</th>
<th>Catalog Year</th>
<th>Recommended</th>
<th>Actions</th>
</tr>
</thead>
<tbody>
<tr>
<td>22.12</td>
<td>212225 - 212226</td>
<td>✴</td>
<td>[+ Add to My Templates]</td>
</tr>
<tr>
<td>22.9 major template</td>
<td>2022 - 2025</td>
<td>✴</td>
<td>[+ Add to My Templates]</td>
</tr>
<tr>
<td>22.9 Minor template</td>
<td>2022 - 2025</td>
<td>✴</td>
<td>[+ Add to My Templates]</td>
</tr>
<tr>
<td>Aerospace</td>
<td>2015 - 2055</td>
<td>✴</td>
<td>[+ Add to My Templates]</td>
</tr>
<tr>
<td>Assoc Arts Heritage Intp</td>
<td>2022 - 2030</td>
<td>✴</td>
<td>[+ Add to My Templates]</td>
</tr>
<tr>
<td>ASSOCIATE OF ARTS: FINE ARTS</td>
<td>2015 - 2050</td>
<td>✴</td>
<td>[+ Add to My Templates]</td>
</tr>
<tr>
<td>ASSOCIATE OF ARTS: HEALTH AND PHYSICAL EDUCATION Specialization</td>
<td>2021 - 2050</td>
<td>✴</td>
<td>[+ Add to My Templates]</td>
</tr>
<tr>
<td>ASSOCIATE OF ARTS: JOURNALISM</td>
<td>201520 - 205050</td>
<td>✴</td>
<td>[+ Add to My Templates]</td>
</tr>
</tbody>
</table>

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

![Composition and Writing II]

"ENG111 - Composition and Writing II"

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**.

![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.

![Add To Term]

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

![Bulk Add to Term]

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**.
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.

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.

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

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.
Courses Not Offered

Courses Not Offered is a feature that is meant to accommodate situations where students have valid coursework 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.
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](image)

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

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.
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.
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.
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.