Navigate: Academic Planner

Navigate's Academic Planner will help faculty and students put together a comprehensive plan to graduation.

1. Once you have logged in to Navigate, use the **Quick Search** feature at the top to find the student you need to advise.
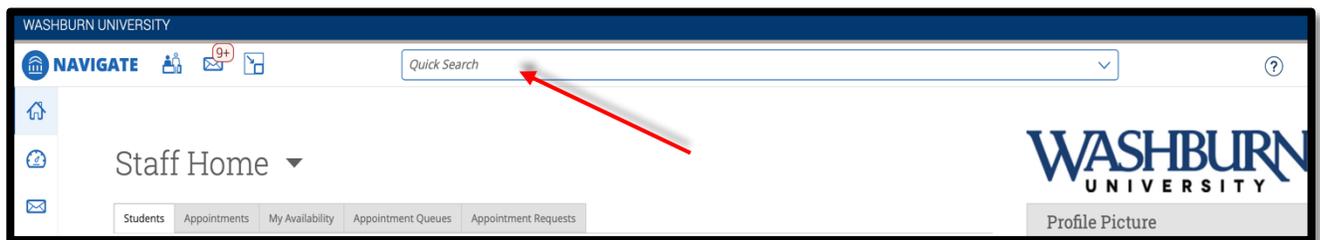
2. On the student's profile, click on the **Academic Plan** tab underneath the student's name.
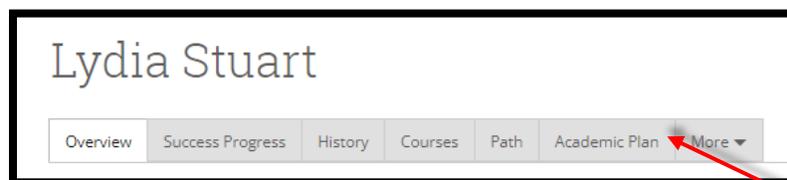
3. The **Planner** is laid out in three sections. The left-hand panel displays the **Planning Tools** and is where templates or preloaded courses can be selected. The center panel displays the **Student's Current Plan** which shows prior semesters completed, courses currently enrolled in, and any future semesters that may be planned out. The right-hand panel is currently blank, but will display **Draft Plans** once you begin making edits.

4. To make edits or suggestions to the student's academic plan, select the blue **Create Plan for Student** button found at the top of the left-hand panel.

5. You have the option to **Create New Plan**, **Use Student's Current Plan**, or **Use Sent Plan**. The **Create New Plan** option will create a plan without any changes the student may have already made. The **Use Student's Current Plan** will leave any changes the student may have made in place. The **Use Sent Plan** will allow you to start with a plan you or another advisor previously sent to the student. We recommend you select **Use Student's Current Plan** or **Use Sent Plan**.
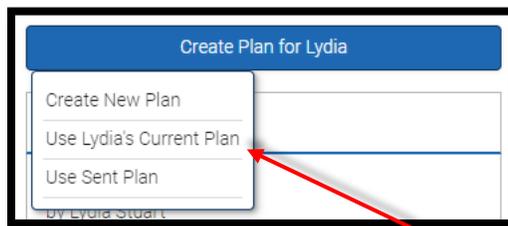
6. You will then be asked to **Create Draft Plan Name**. This auto-populates as a timestamp. You can keep this name or change it. We do recommend keeping a date in your naming convention.
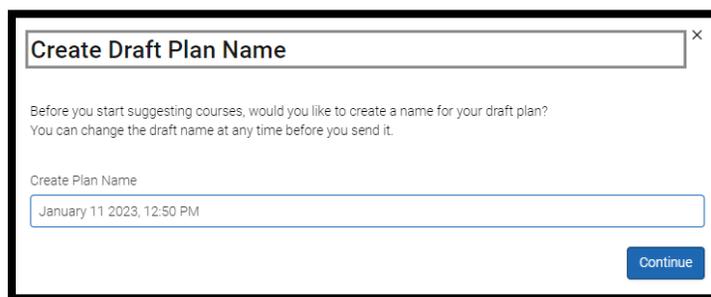
7. On the left-hand side of the screen, under **the student's name**, you will see the student's program.

8. In the **Planning Tools** panel, under the **Template Library** there is a link to **+ Add Templates**. Click this to select the templates that correspond to the student's academic program(s), or select **View Selected Templates** to see the template the student has already chosen.
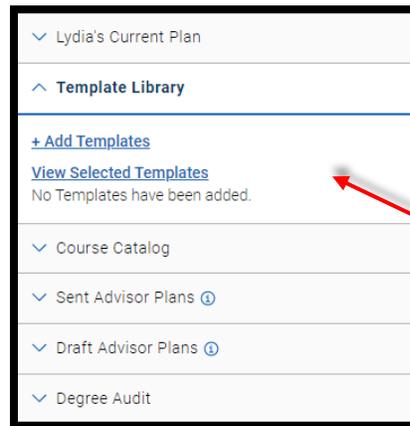
9. If your student is declared in a program they will have **Recommended** templates populate at the top of the list as indicated by a green star. If there are no recommended templates, the search bar will allow you to look up a template and add it by clicking the **+ Add to My Templates** button.

Students should have a minimum of two templates: one Degree template (ex. Bachelor of Arts: University Core & General Education) and one Program template (ex. Psychology: BA). Students may also have minor or certificate templates.
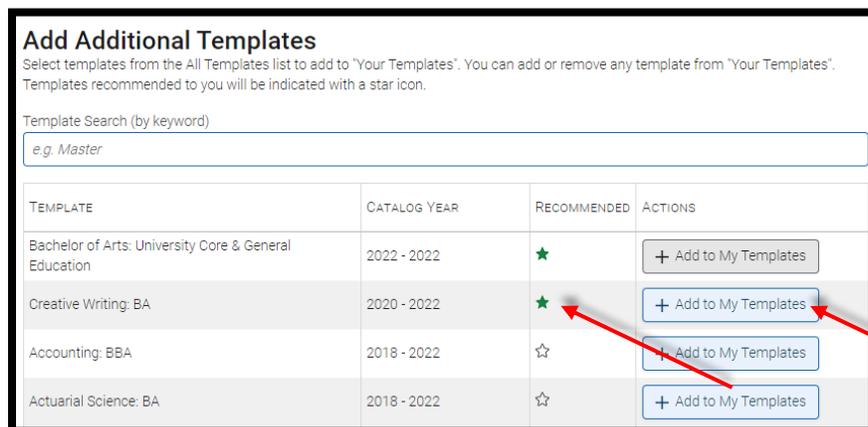
10. Once all templates have been added, select the **View Selected Templates** link from the **Template Library** to display the courses found on each template in the center panel.
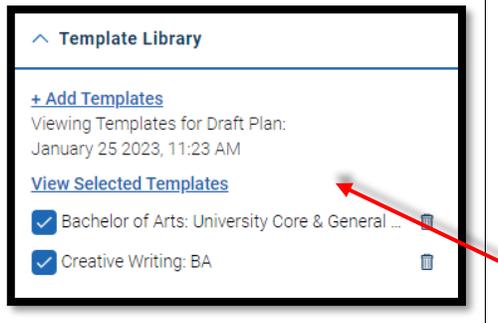
11. To begin planning out courses into future semesters click the menu button on the right panel and select **Add a Term**. Then choose your desired term.
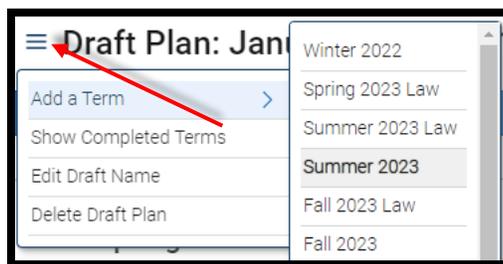
12. To view the courses that this student has already taken, is taking, or has already planned and how each relates to the selected templates, click the **Show Matched Column** toggle at the top of the center panel. Select the arrow next to a matched course to see the details of that match, including the grade the student received.
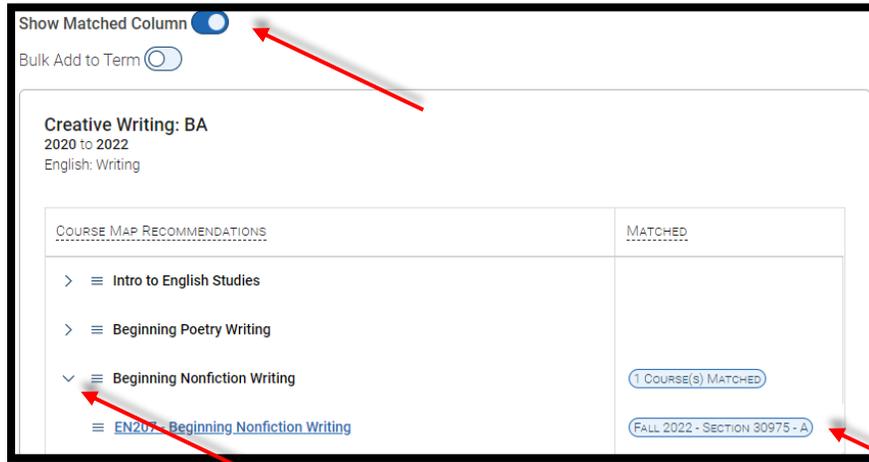
13. Now you can begin to add courses to the semester. Click on the course you wish to add from the center panel and select the term you want that course to be taken in.
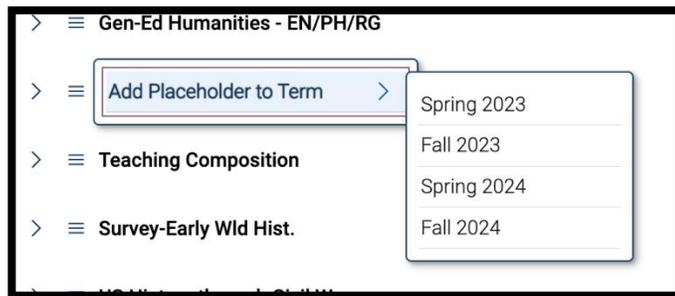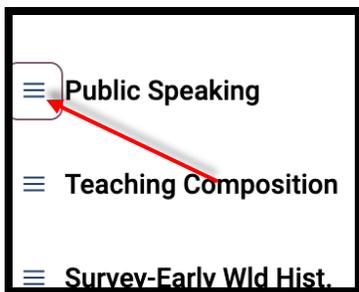
14. To plan out a specific course found in a grouping of courses (where the student has a range of options to choose from, Ex. **WU101 OR HN101,** or **Gen-Ed Humanities Creative Performing Arts**), click the side arrow next to the course group and select the desired course from the list of course options.
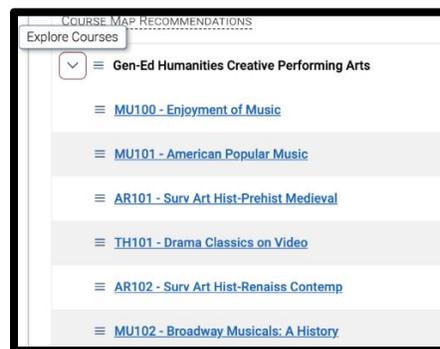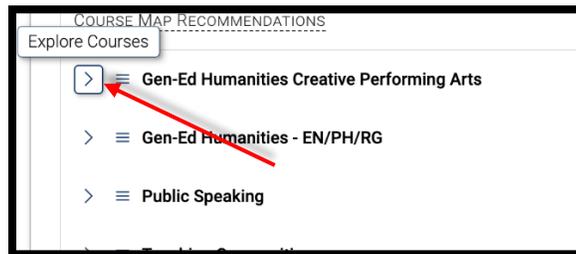
15. To add multiple courses at once to a single term, select the **Bulk Add to Term** toggle at the top of the center panel. Then click the checkboxes next to the courses you want, and select **Add to Term** and the appropriate semester.
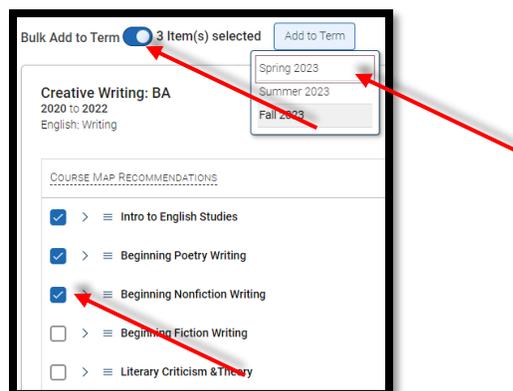
16. **Using the Search Feature**: If your desired course is not found among the pre-populated classes listed in the center panel, select the **Course Catalog** in the left-hand panel, then use the **Search for Courses** link to find your course (you may search by course code – **PY100**, course title – **Basic Concepts of Psychology**, or keyword/topic – **Psychology**).
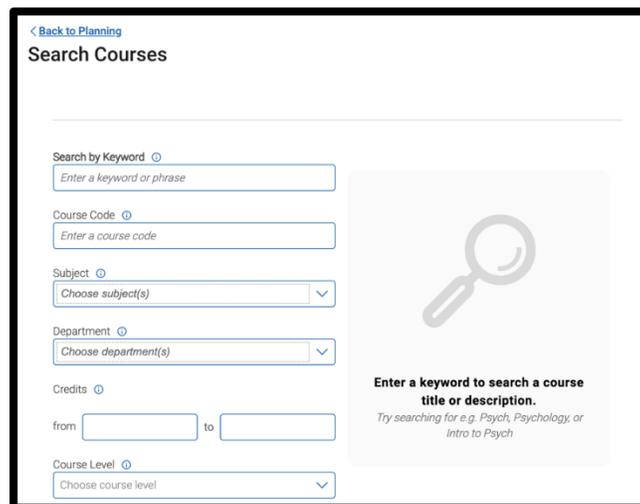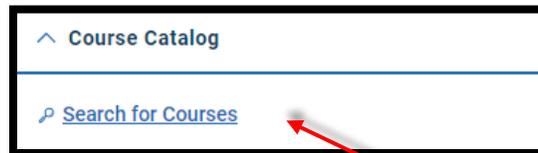
17. To add the course from the search, select the checkbox next to the desired course. Then select the term you wish to add it to, then click **Add to Term**.

*Last Updated 01.26.23
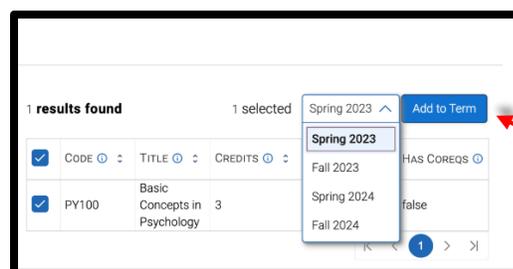
18. To return to the list of template courses select the **View Selected Templates** link from the **Template Library** on the left-hand panel.
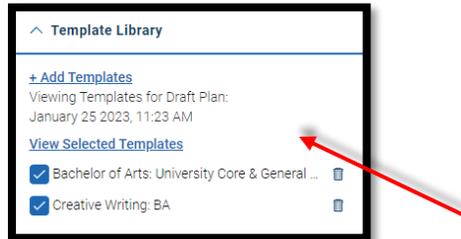
Additional Academic Planning features:

19. **Features for Planned Courses:**

   Once a class is planned (on the right-hand panel) you can move, delete, or learn more about it. Click on the menu to the left of each course.
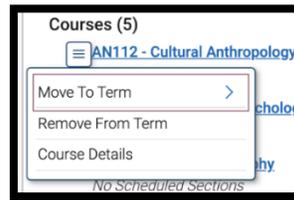
   - Selecting **Move to Term** allows you to move that course to a different term

   - Selecting **Remove from Term** will remove that course from the planned term

   - Selecting **Course Details** will display the course description and any potential pre-requisites/co-requisites

*Last Updated 01.26.23
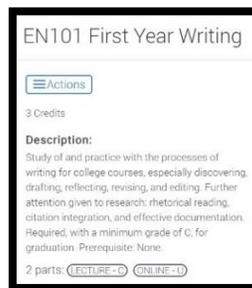
You can also add comments on each course. On the right-hand panel, next to each course is a comment box. Click this icon to **Add/Edit Comments** on that course. Add your comment, then click **Save**. Comments may also be added to an entire term.
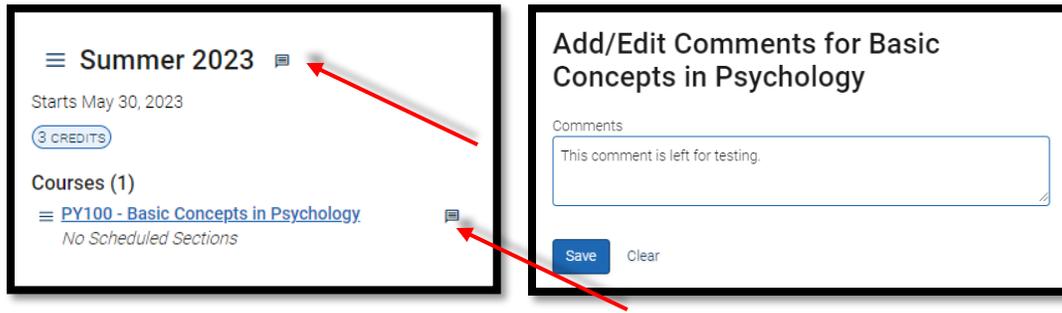
20. **Features for Plans:**

On the left-hand panel:
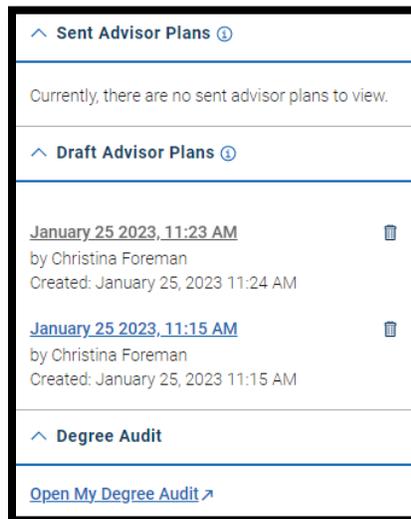
- You can view **Sent Advisor Plans**. These may be plans you previously sent, or that another advisor previously sent.

- You can view any **Draft Advisor Plans**. These are plans that have not been sent to the student.

- You can pull up the student's **Degree Audit** to do an official graduation check.

21. Once you are finished making edits to your student's plan, select your draft from the **Draft Advisor Plans** in the **Planning Tools** section in the left-hand panel. Then click **Send Plan to Student** on the right-hand panel.

△ **Draft Advisor Plans** ⓘ

January 25 2023, 11:23 AM
by Christina Foreman
Created: January 25, 2023 11:24 AM

January 25 2023, 11:15 AM
by Christina Foreman
Created: January 25, 2023 11:15 AM

Send Plan to Lydia
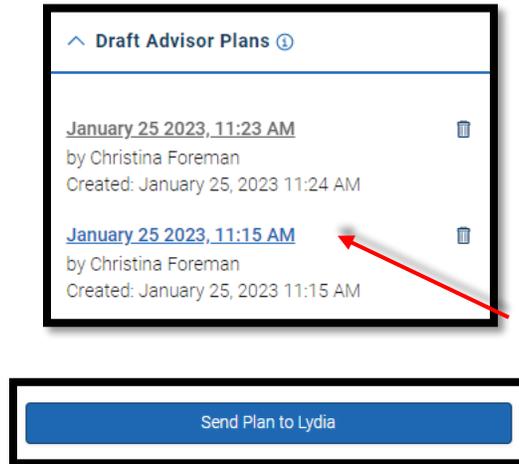
22. This opens box that allows you to enter more information or comments to your plan before sending it. When you are ready, click **Send.**

Send Suggestions to Student   ×

Student and other advisors will see this plan under Advisor Plans menu option.
Once student has viewed the plan, it will be acknowledged.

Plan Title
January 11 2023, 12:50 PM

Add Overall Comments or Suggestions to Plan

Send   Clear
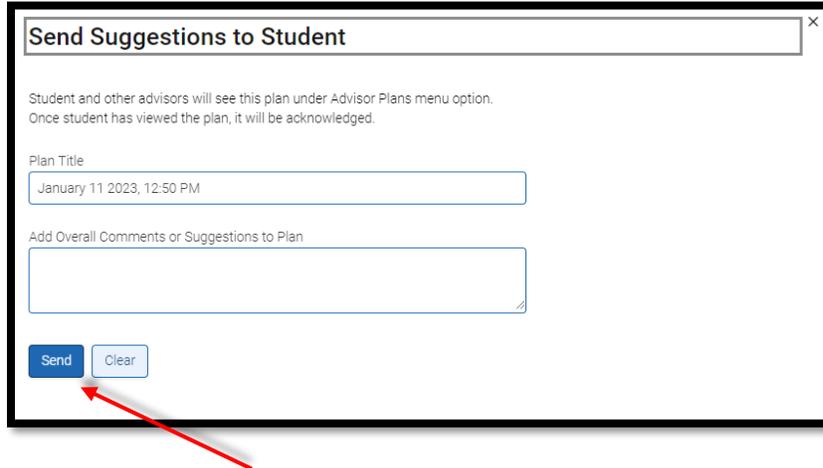
23. Once you click **Send**, your comments and suggestions will be sent to the student's Navigate App and the student will receive a notification to review your comments and suggestions.