



JENZABAR **CX**

Academic Planner

Implementation Guide

Configuration and Maintenance

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Table of Contents

Getting Started	1
Intended Audience	1
How to Use This Manual	1
Product Differences	1
Prerequisites for Using Academic Planner	1
Before you begin.....	1
Macros and Includes.....	3
Enable Macro	3
Reinstalls to Implement Academic Planner	3
Tables	5
Order of Table Implementation.....	5
Plan Status Table	6
File Code Table	6
Calendar Type Table	7
Calendar Semester Table	7
Program Table	8
Subprogram Table	8
Campus Table	9
Subprogram/Location Table.....	10
Plan Options Table	10
Subprogram Session Table.....	11
Instructional Method Table	12
Grade Table.....	12
Major Table.....	12
Minor Table.....	12
Concentration Table	12
Building Table	12
Plan Alternate Advisor Table	13
Advisor Table	13
Course Projection Group Record	13
Course Projection Record	13
Course Record.....	14
Program Enrollment Record	14
Audit Requirement Record	14
Audit Sequence Record	14
Audit Form Table	15
Session Table	15
Maintenance Procedures	16
Maintenance issues	16
Index.....	17



Getting Started

This manual provides technical information required to install, customize, and maintain the Academic Planner product within Jenzabar CX.

Intended Audience

This manual is for use by those individuals responsible for the implementation, customization, and maintenance of CX.

How to Use This Manual

Use this manual for instructions on how to set up CX to support the Academic Planner functionality within JICS.

Note For information about the Common tables and records, see the *CX Implementation Guide*. For information about the Registration tables and records, see *CX Registration Implementation Guide*. For information about the Degree Audit tables and records, see *CX Degree Audit Implementation Guide*.

Product Differences

This manual contains information for using all features within Academic Planner. Your institution may or may not have all the features documented in this manual.

Prerequisites for Using Academic Planner

In order to use the Academic Planner, you must:

- Use CX's Degree Audit, including its auto-select feature.
- Use Jenzabar's JICS portal to the internet.

Before you begin

To maximize your success, the following list of setup issues must be completed before you begin implementing Academic Planner.

1. In the Program Enrollment record (prog_enr_rec), every student must have the appropriate value in the subprog field, a Y in the primary_flag field, and a valid value in the home_location field.

2. The Web Order field in the Subprogram table (subprog_table.web_ord) should be set for all of your Academic Planner subprograms starting at/with zero.
3. In the Session table (sess_table), you must define the Web Order field. You also must set the Web Display field in the Session table to Y.
4. The dates in your Calendar Semester table (calsem_table) need to correspond to the dates in your Academic Calendar record (acad_cal_rec). The dates from one semester to the next must be contiguous with no gaps.
5. You must have at least one entry in the Subprogram Location table (subprogloc_table) for each entry in the Filecode table (filecode_table), that is, at least one entry for Minor, one for Major, and/or one for Concentration.
6. You must have entries in the Catalog table (cat_table) for all of the years that are in the Calendar Semester table (calsem_table).
7. You must enter a sample Suggested Plan in the Student Plan record (stuplan_rec) via senter2 before attempting to view the Suggested Plan portlet or it will produce an error. An example entry follows:

```

plan_no      [8          ]
id           [99000001   ]
stat         [W ]
stat_date_time [2011-03-28 09:40:12.756]
pdesc        [Descriptive Text          ]
prog         [          ]
subprog       [UTRD]
home_location [MAIN]
deggrp        [          ]
start_yr      [2012  ]
start_sess    [FA  ]
crt_date      [2011-03-28 09:40:13.000]
major1        [BIO ]
major2        [          ]
minor1        [          ]
minor2        [          ]
concl1        [          ]
concl2        [          ]
major1_appr   [          ]
major2_appr   [          ]
minor1_appr   [          ]
minor2_appr   [          ]
concl1_appr   [          ]
concl2_appr   [          ]
uid           [99000001   ]
orig_plan     [0          ]
suggplan      [Y]
deg           [BS  ]
cat           [          ]

```



Macros and Includes

This section provides reference information about macros and includes used to set up the Academic Planner product.

Enable Macro

Academic Planner is implemented by a single macro, `ENABLE_MOD ACAD_PLAN`. As delivered, the macro is set to `N`, which causes all the various screen fields, tables, and Academic Planner-specific table entries to be disabled.

Reinstalls to Implement Academic Planner

When you set the macro value to `Y` to enable Academic Planner, you must perform the following reinstalls to cause the Academic Planner-specific elements to be available.

- ☐ `macros/custom/configure`
- ☐ `include/applic/crsent`
- ☐ `menusrc/student/regist/schedule/menudesc`
- ☐ `menusrc/student/regist/schedule/reports/menudesc`
- ☐ `menusrc/student/regist/tables/menudesc`
- ☐ `modules/common/reports/tbldg`
- ☐ `modules/common/reports/tconc`
- ☐ `modules/common/reports/tmajor`
- ☐ `modules/common/reports/tminor`
- ☐ `modules/common/screens/tmajmincon`
- ☐ `modules/degau/progscr/audent/req`
- ☐ `modules/degau/progscr/audent/seq`
- ☐ `modules/degau/reports/audreq`
- ☐ `modules/regist/progscr/crsent/course`
- ☐ `modules/regist/progscr/stuentry/progenr_2`
- ☐ `modules/regist/reports/tgrd`
- ☐ `modules/regist/reports/tim`
- ☐ `modules/regist/reports/tsubprog`
- ☐ `modules/regist/screens/tgrd`
- ☐ `modules/regist/screens/tim`

- ☐ modules/regist/screens/tsubprog
- ☐ src/regist/crsent



Tables

This section provides reference information on the tables available in the Academic Planner product.

Order of Table Implementation

When setting up Academic Planner, implement the tables and records in the following order. Note that some of these tables are not specific to Academic Planner, but are used within other components of CX Student/Registration.

8. Plan Status table
9. File Code table
10. Calendar Type table
11. Calendar Semester table
12. Program table
13. Subprogram table
14. Campus table
15. Subprogram/Location table
16. Plan Options table
17. Subprogram Session table
18. Instructional Method table
19. Grade table
20. Major table
21. Minor table
22. Concentration table
23. Building table
24. Plan Alternate Advisor table
25. Advisor table
26. Course Projection Group record
27. Course Projection record
28. Course record
29. Program Enrollment record
30. Audit Requirement record
31. Audit Sequence record
32. Audit Form table
33. Session table

Information about the tables follows in this section, in the order in which the tables are implemented.

Plan Status Table

The Plan Status table (planstat_table) defines the various stages of completion of a student's academic plan. Jenzabar provides rows for this table, and because the status codes cause certain processes to be executed, they should not be modified. Statuses appear on the Plan List screen in the Academic Planner and the Academic Plan Approval portlet screens.

The Web Display Order (web_ord) field in the Plan Status table controls the sort order and display of student plans on the Academic Plan Approval screen. The lower the number, the higher the sort priority; for example, if you want plans with a status of Pending Advisor Approval to appear first for advisors, set the Web Display order for that plan status to 0.

The statuses are:

Status	Description
A	Approved for registration
D	Advisor suggests revisions
P	Pending advisor approval
PD	Pending department approval
S	Snapshot
W	Not approved

File Code Table

The File Code table (filecode_table) defines field labels and designates where data is stored for dropdown lists when the student or advisor is setting up plans for majors, minors, or concentrations; it provides the association between database tables and screen labels. Jenzabar provides rows for this table; therefore, you should not change or add to this table unless you have made modifications to the Degree Audit process, causing your audits to apply to values other than those three criteria.

The codes are:

Code	Label	Table name	Field name
J	Major	major_table	major
N	Minor	minor_table	minor
C	Concentration	conc_table	conc

Calendar Type Table

The Calendar type table (caltype_table) defines the types of calendars you have at your institution and the terms/sessions that are appropriate for each type. For any given calendar type, you can assign up to six sessions.

The sessions are used to control the display of the Student View in JICS and dictate when various courses can be scheduled or planned to be taken.

Example entries for this table are:

Calendar type	Description	Sessions					
		1	2	3	4	5	6
UTRD	Undergrad Traditional	FA	SP	SU			
UNTR	Undergrad Non-traditional	FA	F2	SP	S2	SU	
GTRD	Graduate Traditional	FA	SP	SU			

In the above example, the traditional graduate and undergraduate calendars have three sessions, Fall, Spring and Summer, while the non-traditional calendar has five sessions, Fall1, Fall2, Spring1, Spring2, and Summer. All the sessions included on this table must first be defined in your Session table. Note that in the above example, the Graduate Traditional calendar and the Undergrad Traditional calendars are identical and could therefore be under a single calendar type (e.g., TRAD); in other words, you could set the table up to contain only two rows, one for traditional and one for non-traditional.

Calendar Semester Table

The Calendar Semester table (calsem_table) designates the start and end dates of your sessions or terms. Dates from one session or term must be contiguous to the next session or term so the system can determine which is current.

Example entries for this table are:

Calendar type	Year	Session	Academic year	Begin date	End date
UTRD	2009	FA	0910	08/01/2009	12/31/2009
UTRD	2010	SP	0910	01/01/2010	05/31/2010
UTRD	2010	SU	0910	06/01/2010	07/31/2010
GTRD	2009	FA	0910	08/01/2009	12/31/2009
GTRD	2010	SP	0910	01/01/2010	05/31/2010
GTRD	2010	SU	0910	06/01/2010	07/31/2010

UNTR	2009	FA	0910	08/01/2009	09/30/2009
UNTR	2009	F2	0910	10/01/2009	12/31/2009
UNTR	2010	SP	0910	01/01/2010	02/28/2010
UNTR	2010	S2	0910	03/01/2010	05/01/2010
UNTR	2010	SU	0910	05/02/2010	07/31/2010

In the above examples, note the following:

- The Academic Year (in this case, 0910) must be valid in macros/custom/periodic for the macro FA_YR_VALID.
- The Begin date for each term must be one day and one day only after the End date of the previous term.
- The End dates of the terms correspond to dates in the Academic Calendar table.

Program Table

The Program table (prog_table) differentiates separate programs of study at your institution (e.g., Undergraduate and Graduate). This table is an integral part of CX and only requires minor modification for use with Academic Planner.

The Web Order field in the Program table controls the sort order in which the programs are listed in the Program field dropdown list on the Suggested Academic Plans screen.

Subprogram Table

The Subprogram table (subprog_table) differentiates separate subprograms of study at your institution when those programs operate in significantly different ways (e.g., a traditional Masters program and an accelerated program, which are controlled under different calendars).

The Web Order field in the Subprogram table controls the sort order in which the subprograms are listed in the Subprogram field dropdown list on the Suggested Academic Plans screen.

CAUTION

Once the Subprogram table is populated, one of the subprogram codes must be added to the Program Enrollment record for each student in order for the application to work correctly.

Example entries for this table are:

Subprogram	Description	Program	Web order	Calendar type	Default viewing mode
GTRD	Grad traditional	GRAD	3	GTRD	D
UTRD	Undergrad	UNDG	1	UTRD	D

	traditional				
UNTR	Undergrad non- traditional	UNDG	2	UNTR	D

In the above examples, each of the three subprograms operates under a different calendar, as defined in the Calendar Semester table. The Default viewing mode refers to the way that classes show in the portlet; a D indicates that the classes will all show in a daily grid, while an M would show classes in a monthly grid. An example of a daily grid follows:

	Monday	Tuesday	Wednesday	Thursday	Friday
8:30					
9:30					
10:30					
11:30					
12:30					
1:30					
2:30					
3:30					
4:30					
5:30					

Campus Table

The Campus table (camp_table) provides the means for defining your campuses, including their addresses and primary contact persons. Campus locations serve as a filter for students as they search for courses.

Two example entries for this table are:

Field	Example 1	Example 2
Campus code	MAIN	NRTH
Campus name	Main campus	North campus
Web display	Y	Y
Priority	0	0
Address line 1	442 University Blvd.	1229 N. Pike Rd.
Address line 2	Building N-4	
City	Memphis	Bartlett
State	TN	TN
Zip	37419	38194

Field	Example 1	Example 2
Contact Person ID	15779	16788

Subprogram/Location Table

The Subprogram/Location table (subprogloc_table) controls the values that appear on dropdown lists for major, minor, degree, and concentration for a given subprogram and campus.

Example entries for this table are:

Subprogram location number	Program	Subprogram	Campus	Filecode	Value
1	UNDG	UTRD	MAIN	J	ACCT
2	UNDG	UTRD	MAIN	J	BIO
3	UNDG	UTRD	MAIN	J	BUA
4	UNDG	UTRD	MAIN	J	CHE
5	UNDG	UTRD	MAIN	J	ECO
6	UNDG	UTRD	MAIN	J	HIST
7	UNDG	UTRD	MAIN	N	ACC
8	UNDG	UTRD	MAIN	J	MATH
9	UNDG	UTRD	MAIN	N	BIB
10	UNDG	UTRD	MAIN	N	BIO
11	UNDG	UTRD	MAIN	N	BUS
12	UNDG	UTRD	MAIN	N	CHE

In the above example, if the student is a traditional undergraduate student on the main campus, available majors are ACCT, BIO, BUA, CHE, ECO, HIST, and MATH. Available minors are ACC, BIB, BIO, BUS, and CHE. Recall that the codes for major, minor, and concentration were defined in the File Code table.

Plan Options Table

The Plan Options table (planoption_table) defines which dropdown list options appear (and can be selected) on an Academic Plan Options screen within the portlet. It also designates the order in which the options should appear.

Example entries for this table are:

Plan option number	Program	Subprogram	Order	File code
1	UNDG	UTRD	10	J

Plan option number	Program	Subprogram	Order	File code
2	UNDG	UTRD	20	N
3	UNDG	UTRD	30	C
4	UNDG	UNTR	10	J
5	UNDG	UNTR	20	C
6	UNDG	UNTR	30	N
7	GRAD	GTRD	10	J
8	GRAD	GTRD	20	C

The Order serves as a priority, where the smaller/lower the number, the higher the priority or sort order. In this example, a traditional undergraduate student will see majors, minors, and concentrations, in that order; a traditional graduate student will see majors and concentrations only. Non-traditional students will only see majors and minors. Recall that the codes for major, minor, and concentration were defined in the File Code table.

Subprogram Session Table

The Subprogram Session table (subprosess_table) designates the minimum and maximum hour checks for each subprogram for each term. If a student's total planned courses for a given term result in total hours that do not fall between these two values, the Academic Planner will generate a message on the Holds & Warnings tab of the portlet.

Example entries for this table are:

Program	Subprogram	Session	Min hours	Max hours	Max online	Show subsession
UNDG	UTRD	SP	12.0	18.0	1	Y
UNDG	UTRD	FA	12.0	18.0	1	Y
UNDG	UTRD	SU	3.0	9.0	1	Y
GRAD	GTRD	FA	6.0	9.0	3	Y
GRAD	GTRD	SP	6.0	9.0	3	Y

In this example, a traditional undergraduate student enrolling in the Spring term must take between 12 and 18 credit hours of coursework, and no more than one of the courses can be an online offering; otherwise, a warning will appear. In contrast, traditional graduate students enrolling in the Spring term must take between 6 and 9 credit hours, and up to three of their courses can be online offerings.

Instructional Method Table

Another table already in use in the CX Student area, the Instructional Method table (im_table) designates whether courses available for selection for a plan appear as occurring by date or by meeting. Traditional instructor-led classes appear by meeting (controlled by using a Plan Display of M), as they have set times when the entire class meets together. Alternatively, online classes occur by date since no class meetings take place. The use of the date (D) designation causes online classes to show section dates instead of meeting dates.

Grade Table

The Grade table (grd_table), a CX table used throughout Grading and Transcript, has an additional function in Academic Planner. The Audit Planned field indicates whether a course with the selected grade is to be included for Degree Audit, but only as a Planned or "In Progress" course. Depending on the policies at your institution, you might set this value to Y for both IP and NR (not reported) grades.

Major Table

The Major table (major_table), a CX table used throughout Registration, contains a Freshman Seminar flag used by Academic Planner. When set to Y, the plan for the related major can be approved by someone other than the student's advisor (typically someone who is working with freshmen during an orientation period).

Minor Table

The Minor table (minor_table), a CX table used throughout Registration, contains a Freshman Seminar flag used by Academic Planner. When set to Y, the plan for the related minor can be approved by someone other than the student's advisor (typically someone who is working with freshmen during an orientation period).

Concentration Table

The Concentration table (conc_table), a CX table used throughout Registration, contains a Freshman Seminar flag used by Academic Planner. When set to Y, the plan for the related concentration can be approved by someone other than the student's advisor (typically someone who is working with freshmen during an orientation period).

Building Table

The Web Display field in the Building table (bldg_table) controls whether the selected building can be included in a student search when the student is looking

for courses to add to a plan. Other fields in the table provide information about the location of course meetings.

Plan Alternate Advisor Table

The Plan Alternate Advisor table (`plnperm_table`) enables you to control whether or not an alternate advisor may work with another advisor's students. The system assumes an advisor always has permissions to work with his/her own advisees.

The table only has two fields (other than the active and inactive dates): the Primary Advisor ID (the original or assigned advisor), and the Alternate Advisor ID (the substitute advisor).

Advisor Table

The Advisor table (`adv_table`) enables you to designate a particular advisor to approve plans by program, subprogram, major, minor, and concentration.

The table includes the advisor's ID and fields where you can designate which types of plans the advisor can approve.

Course Projection Group Record

The Course Projection Group record (`projgrp_rec`) defines which disciplines to use on a plan for a student's subprogram; it defines the disciplines on which the student can search, typically when adding electives to a plan.

The table contains four fields, all of which need to be completed:

- Program
- Subprogram
- Campus
- Discipline

If no limits exist, every discipline must be included in the table for each program, subprogram, and campus. Note that the Discipline table is a required table for the Academic Planner.

Course Projection Record

The Course Projection record (`crsproj_rec`) designates when courses are projected to be offered. Because they relate to course setup, the records are created through Catalog Maintenance.

Basic requirements for the Course Projection record are the Year, Session, Subsession, Subprogram, Location, Instructional Method, and a flag to indicate whether the course should be displayed on the Web.

For more information about the Course Projection record, see *Course/Class Schedule User Reference*.

Course Record

The Course record (crs_rec) contains three fields pertinent to Academic Planner: Student Add, (Student) Drop, and (Student) Change. For all courses that relate to Academic Planner, users should indicate whether students can add, drop or change their registrations online, or whether they should just be able to plan for the courses. Typically, you would prevent students from changing their scheduled courses online if they are enrolled in a non-traditional program or a strictly defined regimen of study in which a change in coursework would cause problems in completing the plan. For more information, see the Course Catalog screen in *Course/Class Schedule User Reference*.

Program Enrollment Record

Since the Program Enrollment record is an essential record created for each student, it is not a table that requires setup simply for use of the Academic Planner. However, certain fields in the Program Enrollment record (prog_enr_rec) are important to the Academic Planner process. Students should have the Home Location set to one of the values in the Campus table. Additionally, the Primary flag should be set on the primary Program Enrollment record to make sure the student sees the courses in the location to which he/she is most closely associated. These two fields appear on the second screen of the standard Program Enrollment data entry screen. For more information about the Program Enrollment record, see *Registration User Reference*.

Additionally, once the Subprogram table is populated , one of the subprogram codes must be added to the Program Enrollment record for each student in order for the application to work correctly.

Audit Requirement Record

The Audit Requirement record (audreq_rec), a key element of Degree Audit, must be designated to appear on the Web for any audits that will be part of Academic Planner. This designation occurs when the Web field (that is, the web_display column of the record) is set to Y. For more information about the Audit Requirement record and its setup within Degree Audit, see *Degree Audit User Reference* and *Degree Audit Implementation Guide*.

Audit Sequence Record

The Audit Sequence record (audseq_rec), a key element of Degree Audit, must be designated to appear on the Web for any audits that will be part of Academic Planner. This designation occurs when the Web field (that is, the web_display column of the record) is set to Y. For more information about the Audit Sequence record and its setup within Degree Audit, see *Degree Audit User Reference* and *Degree Audit Implementation Guide*.

Audit Form Table

The Audit Form table (audform_table, a previously existing CX table), was modified to add the following new field: **plancompl_txt**

This is the text used on degree audit output for planned or met subaudits, requirements and sequences.

Session Table

The web order field in the Session table (sess_table, a previously existing CX table) must contain a numeric value.



Maintenance Procedures

This section provides procedures you need to maintain the Academic Planner product.

Maintenance issues

Because Academic Planner is dependent on Course/Class Schedule, all normal course/class schedule maintenance must be performed to keep Academic Planner up to date.

Additionally, the following tables and records must be updated.

Calendar Semester Table

Change the begin/end dates of the sessions or terms

Course Projection Record

Change the projected dates when courses will be offered



Index

A

Advisor table, 13
Audit Form table, 15
Audit Requirement record, 14
Audit Sequence record, 14

B

Building table, 12

C

Calendar Semester table, 7
 setup, 2
Calendar Type table, 7
Campus table, 9
Catalog table
 setup, 2
Concentration table, 12
Course Projection Group record, 13
Course Projection record, 13
Course record, 14

E

ENABLE_MOD_ACAD_PLAN, 3

F

File Code table, 6

G

Grade table, 12

I

Instructional Method table, 12

M

macros and includes

 information about, 3
Major table, 12
Minor table, 12

O

order of table setup, 5

P

Plan Alternate Advisor table, 13
Plan Options table, 10
Plan Status table, 6
procedures
 maintenance, 16
Program Enrollment record, 14
 setup, 1, 5, 8, 14
Program table, 8

R

reinstalls, 3

S

Session table, 15
setup
 macros, 3
 reinstalls required, 3
 tables, 5
Student Plan record
 setup, 2
Subprogram Location table
 setup, 2
Subprogram Session table, 11
Subprogram table, 8
 setup, 2
Subprogram/Location table, 10

T

tables, 5