



JENZABAR CX

CX Academic Planner

User Reference

Screens and Messages

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How to Use This Document

This document contains reference material for the user of Academic Planner. It contains descriptions of standard screens within CRM Student or CRM Faculty, two elements of Jenzabar's Internet Campus Solution (JICS).

Use the contents of this document to become familiar with the various screens and commands that students, advisors, and faculty members will see when they use CRM Student or CRM Faculty for planning or approving coursework.



Screens

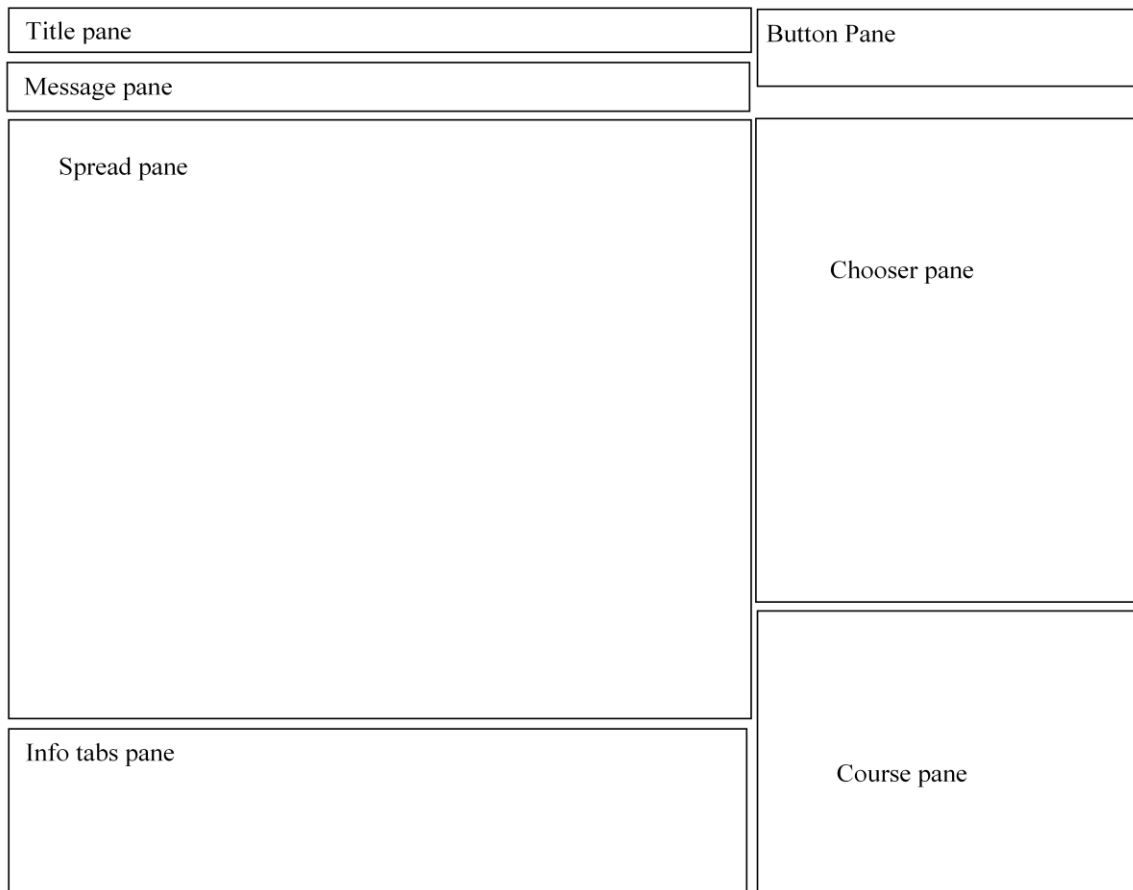
The screens in this section represent those contained in Academic Planner. If your institution changes these screens and windows to meet its specific needs, then your screens will look different from those shown in this section.

Commands

The commands on Academic Planner screens can change, depending on procedures you perform or commands you have previously selected.

Panes

Academic Planner screens conform to a standard layout consisting of multiple "panes," or screen areas. The diagram below shows the general position of the panes, as well as the names for each pane.



Planning Component Screens

The screens in this section are used by students, staff, and advisors during the planning phase of Academic Planner.

Plan List screen

Purpose

The Plan List screen is used by students as a starting point for all features of the Academic Planner

Example

The Plan List screen resembles the following:

Academic Planner

Plan List

Plan name	Status
<input checked="" type="radio"/> Lisa's plan	Approved for Registration
<input type="radio"/> MCOM	Not Approved
<input type="radio"/> trad main	Not Approved
<input type="radio"/> Lisa's plan 2	Approved for Registration

Edit Plan
Copy Plan
Edit Major/Program, etc
Print Plan
Start New Plan
Delete Plan
Refresh Plan List

Pick Sections/Register Drop and Add

Advisor: Lisa Brook

DISCLAIMER:
The Academic Planner is a tool to assist you in planning your academic coursework in preparation for course registration. It is not an audit of your progress for graduation. It is your responsibility to be aware of all graduation requirements according to your catalog year and to successfully complete all such requirements.

You **MUST** have an approved plan before you can pick sections and register for courses.

QUICK START:
1. Create and edit plan (plan created automatically for students in cohort-based programs)
2. Request Approval
3. Advisor approves plan
4. Pick sections
5. Register

COHORT-BASED GRADUATE STUDENTS:
Your plan is created and approved automatically. Skip steps 1, 2, and 3 above. Select elective courses

Fields

Fields or elements on the screen are:

Display message

Text describing the purpose of Academic Planner and how it functions.

Plan Name/Status list

A list of the plans for the selected student from stuplan_rec, (with status other than Snapshot); the plans appear in a radio button list with:

- Plan name (stuplan_rec.pdesc)
- Plan status (stuplan_rec.stat)

The radio button is preselected for the most recently maintained plan (or for the first plan on the list, if this is the first time the user has opened the screen during the current browser session).

Commands

Commands for the screen are:

Edit Plan

Launches the Load Planner screen for the selected plan.

Copy Plan

Copies the required records (stuplan_rec and stuplandtl_rec) from the selected plan to a new plan, except courses that are registered or transferred. The Load Academic Plan Options screen opens for the new plan, and the new plan's status is set to Not Approved.

Edit Major/Program, etc.

Launches the Academic Plan Options screen for the selected plan.

Print Plan

Launches a print dialog box for the selected plan.

Start New Plan

Launches the Academic Plan Options screen, unless the student is not a current student. Non-students receive a warning message.

Delete Plan

Available only for Not Approved plans, displays a question box to confirm the deletion. If confirmed, the stuplan_rec, stuplandtl_rec, stuplanlog_rec, and stuplancom_blob for the selected plan are deleted.

Refresh Plan List

Reloads the screen using new reads of the database.

Pick Sections/Register/Drop and Add

Launches the Scheduler screen.

Academic Plan Options Screen

Purpose

The Academic Plan Options screen enables users to choose majors, concentrations, and other goals as the basis for their graduation plans.

Example

The Academic Plan Options screen resembles the following:

Academic Planner

Academic Plan Options

Select options for this plan and enter a name for this plan.

Degree: BS - Bachelor of Science
Location: Jenzabar University

	1st	2nd
Major	Biology	
Minor		
Concentration		

What name do you want to give this plan?

Fields

Fields or elements on the screen are:

(Instruction message)

Help for using the screen.

Degree

The degree the student is pursuing.

Location

The campus on which the student is an attendee.

Plan name text box

The name of the plan, designated by the user.

(Plan goals)

Dropdown boxes as listed on the planoption_table for the subprogram designated in the student's primary prog_enr_rec. Values in the dropdowns appear in the order set in planoption_table.ord. The system displays dropdown box entries from subprogloc_table for the student's primary subprogram and location, using labels from the filecode_table. Options include:

- Major
- Minor
- Concentration

Note If the plan's status is Pending-Approval or Pending-Department, a warning message will appear above the options.

Commands

Commands for the screen are:

Save Options

For new plans, adds a stuplan_rec with the following values:

- Student ID
- Status of Preliminary
- The selected options
- The plan name
- Some general information from the student's primary prog_enr_rec

For existing plans, if the plan name has changed and the new name is the same as another plan already saved for the student (except a plan with the status of Snapshot), the system displays a name change message and prompts for a new name. If the plan's status is Pending-Approval or Pending Department and any options have changed, a recall notice is sent to the advisor and the plan status is changed to Preliminary.

Note If one or more approved suggested plans exist where the student's plan matches starting year, starting sess, subprog, home_location, deg (from student's primary prog_enr_rec), and major1, the system prompts the student with a dropdown box showing stuplan_rec.pdesc for the suggested plans and an option to not use a suggested plan.

If the student selects a suggested plan, the system copies the stuplandtl_rec of the suggested plan to stuplandtl_rec of the student plan.

Cancel

Discards changes and launches the Load Plan List screen.

Advisee Plan List screen

Purpose

The Advisee Plan List screen is used by faculty and staff as a starting point for the advising features of the Academic Planner.

Example

The Advisee Plan List screen resembles the following:

The screenshot shows a web interface titled "Academic Plan Approval". Below the title is the section "Advisee Plan List". It contains a "Student ID" input field and a "Get Plans" button. Below these are labels for "Plan name" and "Plan status". There are two buttons: "View Plan" and "Print Plan". A text instruction says: "Select an advisee's plan from the list below then click the View Plan button." Below this is a table with three columns: "Advisee", "Plan name", and "Plan status". The table has two rows of data. Each row starts with a radio button. Below the table are two more buttons: "View Plan" and "Print Plan", and a "Refresh Plan List" button.

Advisee	Plan name	Plan status
<input type="radio"/> Palmer, Carson, 202671	My First Plan	Approved for Registration
<input type="radio"/> Palmer, Carson, 202671	My Alternate Test Plan	Not Approved

Fields

Fields or elements on the screen are:

Student ID

The ID of the student for whom the advisor wants to view the plan.

Plan Name/Plan Status

The plans (stuplan_rec) for students who are advisees of this advisor/instructor, based on the adv_id in the student's primary prog_enr_rec.

Advisee/Plan Name/Plan Status

A list of student plans (stuplan_rec) that have a status of Pending-Approval or Pending-Department.

Note The Advisee list can include students who are advisees of an instructor for which this instructor is an alternate, based on plnperm_table.

Each option on the screen is selected via radio button. The first plan for the first student is preselected when the screen opens.

Commands

Commands on the screen are:

Get Plans

Displays plans, with any status, in a radio button list with:

- Plan name
- Plan status

The list sorts by status, in the following order:

- Preliminary
- Snapshot
- Pending-Department
- Pending-Approval
- Approved

Note The sort order depends upon the web_ord values in the planstat_table. You can modify the returned list based on how you have your table set up. For example, if you want the Approved students displaying first, then you would give that status a lower web_ord number (e.g., 1) than the Preliminary status (e.g., 4).

View Plan

Launches the Planner screen.

Print Plan

Launches a print dialog box for the selected plan.

Refresh Plan List

Reloads the screen using new reads of the database.

Planner screen

Purpose

The Planner screen is the location where students create their academic plans, staff members create suggested plans, and advisors review plans.

Example

The Planner screen resembles the following:

Academic Planner

Palmer, Carson My First Plan Approved for

Registration Print Plan to Scheduler/Registration

To begin, select a course, on the right, from 1. **Requirements** (click plus sign to expand list); OR 2. **Courses** (click a discipline to view courses; make selections in Term and Location dropdown boxes to narrow choices); OR 3. **Search** by course number.

Other Credits click to expand

2006-2007 Academic Year click to expand

2007-2008 Academic Year click to expand

2008-2009 Academic Year click to expand

2009-2010 Academic Year click to expand

2011-2012 Academic Year click to expand

2012-2013 Academic Year click to collapse

Fall 2012 (4*) R MAT201 4	Winter Session 2013 (0)	Spring 2013 (0)	Summer Session 2013 (0)
------------------------------	----------------------------	--------------------	----------------------------

2013-2014 Academic Year click to collapse

Fall 2013 (0)	Winter Session 2014 (0)	Spring 2014 (0)	Summer Session 2014 (0)
---------------	----------------------------	--------------------	----------------------------

2014-2015 Academic Year click to expand

2015-2016 Academic Year click to expand

2016-2017 Academic Year click to expand

2017-2018 Academic Year click to expand

2018-2019 Academic Year click to expand

Plan Options click to expand

Select Courses by:

Requirements Courses Search Grades

Please consult the catalog for additional information

Graduation Credit Requirements click to expand

Overall Audit - UG07 click to expand

124 required hrs/43 hrs earned/0 hrs planned
GPA 3.559

General Education - UG07 click to expand

55 required hrs/0 hrs earned/7 hrs planned
GPA

Biology Major click to expand

20 required hrs/4 hrs earned/4 hrs planned

CHE101 Introductory Chemistry (4)

Course Details

Term	Location	Method
Spring 2014	Jenzabar University	Lecture - Discussion
Spring 2016	Jenzabar University	Lecture - Discussion
Spring 2018	Jenzabar University	Lecture - Discussion

Holds & Warnings **Comments** **Approvals** **Remove**

* You have less than 12.0 credits in Fall 2012

Fields

Fields or elements on the screen are:

Plan Options window

A display of basic information about the student and plan, resembling the following:

Plan Options

Name: Lisa Brook

Plan name: My Plan

Status: Not Approved

Catalog: Undergraduate 2006-07

Major: Computer Science

The window contains the following information:

- Student's first and last name
- Plan name (stuplan_rec.pdesc)
- Plan status txt (stuplan_rec.stat joined to planstat_table.stat)
- Student's catalog txt (stuplan_rec.cat joined to cat_table.txt)

Requirement tab

The following types of information appear on the Requirements tab. The tab contains Graduation credit requirements; the system only displays requirements (audreq_rec) and sequence (audseq_rec) if the web_display field in each of those Degree Audit records is set to Y. Additionally, the tab contains:

- Credits already earned, that is, credits earned at your institution or those transferred or earned via exam or prior learning
- Planned coursework
- Earned credits + Planned credits
- Subaudits for the degree and for each major, minor, and concentration selected in the plan options using a cross-reference table of the subaudit code to degrees, majors, minors, and concentrations (subaud_table), using the student's catalog code (stuplan_rec.cat)
- Indicators to the left of course numbers the student has completed, registered for, or planned, as follows:









Successfully met requirements of the course based on Degree Audit tables. A completed course is one the student completed with a passing grade, transferred in, or received credit by exam, life learning, or professional training, based on the cw_rec, crshist_rec, and precw_rec.



Completed the course but did not meet the requirements or course is not yet planned.



The course is in the plan or registered but not yet completed.

Note If all courses/sequence or requirements are marked with , the system will display  next to the level above it. If even one course, sequence, or requirement is marked with  and all the others are marked with  or , the system will then display  next to the level above it.

Courses tab

The Courses tab contains the following information:

- Dropdown box with current and future terms used in course projections (crsproj_rec), including an all terms option; the default is to show all terms
- Dropdown box with all valid locations from campus_table, including an all location option; the default is to show all locations


When the user clicks on the discipline bar on the Courses tab in the Chooser pane, the system expands the discipline to show courses for this discipline

(crs_rec with given discipline) which have course projections (crsproj_rec) for the student's subprogram and match any selection made in the Term or Location dropdown boxes.

Search tab

The Search tab contains the following information:

- Dropdown boxes for current and future terms used in course projections (crsproj_rec)
- All valid locations from campus_table, including an all location option; the default is to show all locations
- Course title or course number, including *begins with*, *contains*, *ends with* and exact match options
- Program
- Input boxes for minimum and maximum hours

When the user enters information on the Search tab in the Chooser pane and selects **Search**, the system displays the course number (crs_rec.crs_no), course title (crs_rec.title1) and credit hours (crs_rec.min_hrs and crs_rec.max_hrs, if different from min_hrs), using either the current or the next course catalog, that matches the search criteria, and the course number is found in course projections (crsproj_rec) for the student's track; a  appears to the left of any course numbers the student successfully completed, registered for, or planned.

Furthermore, the user selects a location on the Location dropdown box on the Courses tab in the Chooser pane to narrow the display to courses with course projections (crsproj_rec) with the selected location (campus_table).

When the user clicks on a course in the plan (within the spread pane), if the course exists in the stuplandtl_rec and not in the cw_rec, the Remove Course command is activated.

Adding a Course to a Plan

Academic Planner reacts differently depending on the status of the plan to which the course is to be added.

If the status is Approved:

The system displays a pop-up dialog box with an "ok-approved" message and Yes and No buttons. If the student clicks **Yes**, the system copies the stuplan_rec, stuplandtl_rec, stuplanlog_rec, and stuplancom_blob for this plan number to a new plan number to create a snapshot of the plan, and puts the current plan number in the snapshot's stuplan_rec.orig_plan. The system also updates the stuplan_rec for the snapshot plan with status of "Snapshot" and status date/time of the current date and time, and updates the stuplan_rec for the current plan with status of Preliminary and status date/time of the current date and time; the system then enables the Request Approval command at the top of the screen.

If the student selects **No**, no update is performed.

If status is Pending-Approval or Pending-Department:

The system displays a pop-up dialog box with an "ok-pending" message and Yes and No buttons.

If the student clicks **Yes**, the system updates the plan status (stuplan_rec.stat) to Preliminary and enables the Request Approval button at top of screen. It also sends a recall notice to the student's advisor. If the student clicks **No**, no update is performed.

If status is Revise:

The system updates the plan status (stuplan_rec.stat) to Preliminary and enables the Enable Request Approval button at the top of the screen.

If the course is in coursework and is not repeatable for credit, and if the course is in cw_rec with passing grade (grd_table.earn_factor > 0) and is not repeatable for credit, the system displays a pop-up dialog box with Yes and No buttons as well as a "repeat-verify" message. If the student clicks **Yes**, the system continues with the update; if, however, the student clicks **No**, no update is performed.

If the course is already in the plan and the course is not repeatable for credit (crs_rec.rep = N), the system will remove the row from stuplandtl_rec for the prior session/year.

If the course is offered for a variable number of credits (crs_rec.min_hrs != crs_rec.max_hrs), the system displays a dialog box with a Variable Hours message and dropdown list of valid hours. The valid hours are delineated by crs_rec.min_hrs and crs_rec.max_hrs, inclusive. A Cancel button appears on the screen as well. If the student clicks a number of hours, the system continues with the update and uses the selected number of hours on stuplandtl_rec; if the student clicks Cancel, no update is performed.

A row is added to stuplandtl_rec for the selected session/year if the course has a concurrent requisite (crsreqgrp_rec); a row is also added to the record for concurrent course(s) (crsreq_rec). If the course has a section requirement for selected session/year (link_sec_rec), the system adds a row to stuplandtl_rec for the linked course (link_sec_rec).

To remove a course from a plan with a status of Revise, the user selects **Remove Course** or can use a drag-and-drop to move the course to the Remove box. The removal deletes the row from the stuplandtl_rec.

If the removed course has a concurrent requisite (crsreqgrp_rec), the system removes the row from the stuplandtl_rec for the concurrent course(s) (crsreq_rec); if the removed course has a section requirement for the selected session/year (link_sec_rec), the system removes the row from stuplandtl_rec for the-linked course (link_sec_rec).

Setup tabs and display in the Info tabs pane

Elements of the Info tabs pane are:

- Holds and warnings; a list showing:
 - Absolute holds which would block registration, as maintained in the hold_rec and hold_act_table
 - Sessions/years with the number of credits outside of the normal range for the student's track
 - Courses with unmet course requisites using completed, waived, credit by exam, transferred (as indicated in the cw_rec) and planned courses (as indicated in the stuplandtl_rec); for example, if course A is a requisite for course B, and a student attempts to plan course B and has also planned course A for the same term, the tab will display a warning that the requisites for course B may not have been satisfied. In

contrast, if the student has had course A waived or has otherwise completed or tested out of course A, no message will appear

- Messages if the student's plan options differ from the student's record in CX
- Comments from the stuplancom_blob (most recent first)
- Approvals; a list showing checkboxes for major(s) and education concentrations (stuplan_rec); also including the contents of the stuplanlog_rec, (most recent first)
- Message box with Close button

Setup tabs and display in the Spread pane

The Spread pane displays the student's plan, including the course number and credits as well as the following:

heading	description	stat	grdg
Transfer	Transfers from cw_rec	T	TR, AD
Exam	Credit by exam from cw_rec	not X or D	AP,CE,CL,CP, DT,EX,TE
Waive	Waived course from cw_rec	V	X, WV, WA
Prior Learning	Professional training and life learning from cw_rec	not X or D	LL, PR

For each session/year, if the student has course work records (cw_rec) for the year, session and course, the system will display the course number, credits, and one of the following indicators in the appropriate session/year. For courses with grd of lab, the system will display the same indicator as the lecture course; lecture and lab courses are linked together in the link_sec_rec.

indicator	tooltip	description	stat	grdg	grd	time
AU	Audit	passed audit course	R	AU	AU	
CR	Credit	credit for completed course	R	SU,LT	earn_fctr > 0	
IP	In Progress	in progress (current session)	R	AU,SU,L T	IP	current
L	Waitlisted	any	L	any	any	
NR	Grade Not Reported	past session with grade of NR, I or IP	R	AU,SU,L T	NR,I,IP	past
R	Registered	registered course (future sessions)	R	AU,SU,L T	IP	future
W	Withdrawn	withdrawn		WD		
X	Did Not Pass	grade of U	R	AU,SU,L T	U	
Vr	Variation from Plan	student selected course within scheduler but did not pick a section				

If the student has plan details records (stuplandtl_rec) but no course work records (cw_rec) for the year, session and course, the system will display the course number and credit hours; if stuplandtl_rec.dvtn_flag contains a value of yes, (i.e., the student deviated from his/her plan when picking sections in the Scheduler), the system will display an indicator of Vr to indicate Variation from Plan.

The system displays column headers based on the calendar type of the subprogram (caltype_table joined to subprog_table), and shows credit hours per session after the session column header (e.g., Fall (14)). For current and future terms, the system highlights the credit hours in red and flags them with an asterisk if the session is outside the normal range of full-time hours for this type of student. For a traditional undergraduate, the range is 12 – 15 credit hours per term.

Message pane: The Message pane provides information about the session and the courses. If no current session or future session course projections (crsproj_rec) for the course exist, the system displays a contact-registrar message.

Spread pane: The Spread pane contains highlighted sessions in open academic years that have valid course projections for this student

When a student selects **Add to Plan**, the system displays course information from the current catalog or the next catalog in the course pane, as follows:

- The course number
- The course title (crs_rec.title1)
- Credit hours (crs_rec.min_hrs and crs_rec.max_hrs, if different from min_hrs)
- The phrase “Repeatable for credit” if crs_rec.rep = Y

Course Details button: The means to display course details. The information appears in a pop-up dialog box with a Close button; the details include course number, credit hours (crs_rec.min_hrs and crs_rec.max_hrs, if different from min_hrs), course title (crs_rec.title1, title2 if not blank, title3 if not blank, and course description.(crsabstr_rec.abstr). If crsrequir_rec exists, the system also displays crsrequir_rec.requir; otherwise, it displays the course requisites.

Commands

Commands on the screen differ, depending on whether the user is a student, staff member, or advisor. They include:

Student Commands

If the user is a student, the available commands are:

Request Approval

Only enabled for plans with a status of Not-Approved, changes the status to Pending. When a user selects the command, the system changes the label on the command button to *Forwarding*. The status of the student’s stup[lan_rec changes to either Pending-Department or Pending-Approval, and the system sends a Request Approval notice to the advisor

Print Plan

Formats the report in current window, shows buttons for a separate window for printing and returns to either the Plan List or Planner screen.

Save Comments

Save comments to the `stuplancom_blob`.

Return To Plan List

Loads the Plan List screen for students; saves any comments.

To Scheduler/Registration

Only enabled for plan with status of Approved, launches the Scheduler screen so student can register based on the plan.

Faculty/Staff Commands

If the plan status is Pending-Approval or Pending-Department and the user is the advisor for the student (from the `prog_enr_rec`) or the advisor's alternate (from `plnperm_table`) or portal group is PLANAPPR, the available commands are:

Approve

If the status is Pending-Approval or Pending-Department and the advisor approves the student's plan, the status is changed to Approved.

Needs Revising

Changes the status of the plan to Revise.

Return To Plan List

Displays the Advisee Plan List screen; saves any comments.

Save Comments

Save comments to the `stuplancom_blob`.

Print Plan

Launches a print dialog box.

If the user is not the advisor or the advisor's alternate, the available commands are:

Return To Plan List

Displays the Plan List screen.

Scheduler/Registration

Shows all appropriate approval checkboxes on the approvals tab.

Suggested Plan Build screen

Purpose

The Suggested Plan Build screen enables staff members to create generic plans that can be selected and adapted for specific students.

Example

The Suggested Plan Build screen resembles the following:

Suggested Plans

UTRD 2012 SP Bachelor of Science Biology Suggested Plan For BIO UG07

To begin, select a course, on the right, from 1. [Requirements](#) (click plus sign to expand list); OR 2. [Courses](#) (click a discipline to view courses; make selections in Term and Location dropdown boxes to narrow choices); OR 3. [Search](#) by course number.

Other Credits [click to expand](#)
2011-2012 Academic Year [click to collapse](#)

Fall 2011 (0)	Spring 2012 (0)	Summer Session 2012 (0)
---------------	-----------------	-------------------------

[2012-2013 Academic Year](#) [click to expand](#)
[2013-2014 Academic Year](#) [click to expand](#)
[2014-2015 Academic Year](#) [click to expand](#)
[2015-2016 Academic Year](#) [click to expand](#)
[2016-2017 Academic Year](#) [click to expand](#)
[2017-2018 Academic Year](#) [click to expand](#)
[2018-2019 Academic Year](#) [click to expand](#)
[2019-2020 Academic Year](#) [click to expand](#)
[2020-2021 Academic Year](#) [click to expand](#)
[2021-2022 Academic Year](#) [click to expand](#)
[2022-2023 Academic Year](#) [click to expand](#)
[2023-2024 Academic Year](#) [click to expand](#)
[2024-2025 Academic Year](#) [click to expand](#)
[2025-2026 Academic Year](#) [click to expand](#)
[2026-2027 Academic Year](#) [click to expand](#)
[2027-2028 Academic Year](#) [click to expand](#)

[Holds & Warnings](#) [Comments](#) [Approvals](#) [Remove](#)

Plan Options [click to expand](#)

Select Courses by:

[Requirements](#) [Courses](#) [Search](#) [Grades](#)

Please consult the catalog for additional information

Graduation Credit Requirements [click to expand](#)
Biology 07
 45 required hrs

Fields

Fields or elements on the screen are:

- Subprogram
- Starting Year - Academic years from the starting year/session to the highest course projection year/session. Within the academic year, sessions matching the calendar type of the-subprogram are displayed.
- Starting Session
- Degree
- Major
- Description (stuplan_rec.txt)
- Requirements tab
- Courses tab
- Search tab

Commands

Commands for the screen are:

Return to Plan List

Displays the Suggested Plan List screen.

Print Plan

Sets up and prints the suggested plan to resemble a student plan.

Activate

Sets the stuplan_rec.stat to A, and the stat_date_time to the current time and date, and then displays the Suggested Plan List screen.

Copy

Uses the dropdown box showing campus and plan description (pdesc) where the starting year, starting session, track, degree, and major match the current suggested plan. After the user selects an existing plan, the system copies the suggested plan detail for that year/session to the current suggested plan detail.

Suggested Plan Options screen

Purpose

The Suggested Plan Options screen provides the user with a starting point for a plan, as set up by a staff member at your institution. It resembles the following:

The screenshot shows a web form titled "Suggested Plans" in a blue header. Below the header are five rows of input fields, each with a label and a value: "Starting year/session" with "2012" and a "Spring" dropdown; "Degree" with "Bachelor of Science" and a dropdown; "Catalog" with "2007 Catalog" and a dropdown; "Major" with "Biology" and a dropdown; and "Suggested Plan Name" with "Suggested Plan For BIC". At the bottom of the form are two buttons: "Cancel" and "Save Options".

- Starting Year - Academic years from the starting year/session to the highest course projection year/session. Within the academic year, sessions matching the calendar type of the track are displayed.
- Starting Session
- Degree
- Catalog
- Major
- Suggested Plan Name (stuplan_rec.txt)

Commands

Commands for the screen are:

Cancel

Discards changes.

Save

Keeps the plan as modified and associates it with the active student.

Scheduling Component Screens

Scheduler Screen

The Scheduler screen enables students to register for sections that are part of approved graduation plans.

How to Access

Launch the Scheduler screen by selecting **To Scheduler/Registration** from the Plan List screen.

Screen Example

The following is an example of the Scheduler screen.

Academic Planner

Palmer, Carson My First Plan Approved for

Registration

To begin, click on a term.

View By: Day Week Month

Summer Session 2012 click to expand

Fall 2012 4 credits registered

	Mon	Tue	Wed	Thu	Fri	Sat
7:00 am						
8:00 am						
9:00 am						
10:00 am						
11:00 am						
12:00 pm						
1:00 pm	MAT201	MAT201		MAT201	MAT201	
2:00 pm						
3:00 pm						
4:00 pm						
5:00 pm						
6:00 pm						

Plan Options click to expand

Select Courses by: Plan Requirements Courses Search

Grades

+ MAT201 Calculus I (4)
Registered in section 01

Add Section Audit Section Add to Waitlist

MAT201 Calculus I (4)
(Repeatable for credit)
Course Details

Term	Location	Method
Fall 2012	Jenzabar University	Lecture - Discussion
Fall 2013	Jenzabar University	Lecture - Discussion
Fall 2014	Jenzabar University	Lecture - Discussion
Fall 2015	Jenzabar University	Lecture - Discussion
Fall 2016	Jenzabar University	Lecture - Discussion

Holds & Warnings Comments Remove

Fields

Fields or elements on the screen are:

Student name

The name of the student.

Message pane

Initial help message, and any other messages generated by the user's actions.

Spread pane

A tab bar for each session/year with a planned or registered course, including the following information:

- Session name
- Year
- For sections selected, number of credits selected as found in stuplandtl_rec.hrs
- For sections registered, number of credits registered as found in cw_rec.hrs

Info tabs pane

Various messages, including:

- Holds and warnings that would block registration.
- Comments from stuplancom_blob, most recent first.

Display Plan tab

Displays, for each course on stuplandtl_rec or cw_rec for the selected session/year, one of the following status indicators:



(yellow yield sign) if section is picked (stuplandtl_rec with sec_no)



(green checkmark) if section is registered (on cw_rec with stat = R)



(green box) if section is waitlisted (on cw_rec with stat = L)

Also displays the following:

- Course number (stuplandtl_rec.crs_no)
- Course title (crs_rec.title1), using course catalog for selected session/year
- Credit hours (stuplandtl_rec.hrs)
- Status message: One of the following:
 - 'Planned' if no section picked and not registered
 - 'Variation from Plan' if no section picked and flagged as deviation
 - 'Section x chosen' if section picked but not registered
 - 'Registered in section x' if section registered for credit
 - 'Registered in section x for audit' if section registered for audit
 - 'On waitlist for section x' if section registered as waitlist

When the user selects a course on the tab, the system opens a space under the course status message to display a message:

- If the course requires a signed form for registration (crs_rec.fac_consent = Y), a Form Required message appears.
- If a signed form is not required (crs_rec.fac_consent != Y) and there are no sections, a Contact Registrar message appears.

- If a signed form is not required (crs_rec.fac_consent is not set to Y) the following information appears:
 - Section number (secmtg_rec.sec_no)
 - Instructional method (mtg_rec.im)
 - Subsession (sec_rec.subsess) (only for traditional, on-campus, undergraduate, summer session)
 - Days the section meets (mtg_rec.days) (if im != WK, OL)
 - Class start time (mtg_rec.beg_tm) (if im != WK, OL)
 - Class end time (mtg_rec.end_tm) (if im != WK, OL)
 - Building (mtg_rec.bldg) (if im != WK, OL)
 - Section begin date (if im = WK, OL)
 - Section end date (if im = WK, OL)
 - Building (mtg_rec.bldg) (if im != WK, OL)
 - Instructor (fac_rec.abbr_name)
 - Location (mtg_rec.campus), on new line with label “Location:”
 - Section title, on new line, if not blank (sec_rec.title), on a new line

When the user selects a section for a course, the system opens a space under the section status message to display a message:

- If the section is full and the waitlist is open, a Full/Waitlist message appears on a new line.
- If both the section and the waitlist are full, a Full/No Waitlist message appears on a new line.

When the user clicks on + to expand section on the Plan tab, the system displays section detail information from the sec_rec, including:

- Building name (bldg_table.txt)
- Schedule comments (schd_comment_rec), if not blank, with label “Comment: “
- Number of students registered (reg_num)
- Maximum number of students allowed to register (max_reg)
- Number of students on waitlist (wait_num)
- Maximum number of students allowed on waitlist (max_wait)

If the section is for a week-end course (mtg_rec.im = “WK”) each class meeting date appears; otherwise, the section begin date and end date are displayed.

Commands in the pane appear as follows:

- If course is already in the schedule, the system takes no action.
- If section is not full, the system enables the **Add Section** command.
- If audits are allowed for this course (crs_rec.grdg_disallow(using course catalog of selected session/year) != AU), the system enables the **Audit Section** command.

- If the student is on a waitlist for the selected section (cw_rec.stat = L); the system enables a remove button with the label **Drop From Waitlist**.
- If the selected section is full, a waitlist is available, the student is not on the waitlist (cw_rec.stat = L) and the current date is between regtime_table beg_date/beg_tm and end_date/end_tm, the system enables the **Add to Waitlist** command.

Chooser pane

Blank plan tab, which fills when a session is selected.

When the plan tab contains a selected plan, the user can click on + to expand the section. The result is to display section details from sec_rec, including:

- Building name (bldg_table.txt)
- Schedule comments (schd_comment_rec), if not blank, with label “Comment: “
- Number of students registered (reg_num)
- Maximum number of students allowed to register (max_reg)
- Number of students on the waitlist (wait_num)
- Maximum number of students allowed on the waitlist (max_wait)
- If the section is for a week-end course (mtg_rec.im = “WK”), each class meeting date; otherwise, the section begin and end dates.

When the user clicks on the section:

- If the course is already in the schedule, no action is taken.
- If section is not full, the system enables the **Add Section** command.
- If auditing is allowed for this course (crs_rec.grdg_disallow(using course catalog of selected session/year) != AU) the system enables the **Audit Section** command.
- If the student is on the waitlist for the selected section (cw_rec.stat = L), the system enables the **Remove** button with the label **Drop From Waitlist**.
- If selected section is full, the waitlist is available, the student is not on waitlist (cw_rec.stat = L), and the current date is between regtime_table beg_date/beg_tm and end_date/end_tm, the system enables the **Add to Waitlist** command.
- If no current session or future session course projections (crsproj_rec) for the course exist, the system displays a Contact Registrar message.

Spread pane

The Spread pane contains highlighted sessions in open academic years that have valid course projections for this student. If more than one section exists for the course, the system prompts the student for a section number; if the course requires a lab, the system prompts the for lab section.

Course Details button

The means to display course details. The information appears in a pop-up dialog box with a Close button; the details include course number, credit hours

(crs_rec.min_hrs and crs_rec.max_hrs, if different from min_hrs), course title (crs_rec.title1, title2 if not blank, title3 if not blank, and course description.(crsabstr_rec.abstr). If crsrequir_rec exists, the system also displays crsrequir_rec.requir; otherwise, it displays the course requisites.

Screen Commands

The following list describes the commands that appear on the Scheduler screen.

Register

Only enabled for session/year if the current time is between regtime_table beg_date/beg_tm and end_date/end_tm., and the student has no holds to block registration. For each course on the plan tab with a section chosen and crs_rec.fac_consent != Y, the system creates a course registration, leaving the status box open until all sections have been processed.

If registration is successful and the course has a required lab or required concurrent course, the system registers the student for that required item and updates the course status message on the Plan tab.

If registration is unsuccessful for the lab or the required concurrent course, the original course is dropped. The system displays a returned message on the Holds & Warnings tab.

Display Schedule

Uses the default view by subprogram for the initial setup. For the day or week view, meeting times that are either solid yellow or solid green are for credit courses; meeting times that are striped are for audit courses.

- For the day view, displays a grid with columns for Monday through Saturday, and rows in one-hour increments; also displays a row labeled “sections without times.”
- For the week view, displays a grid with a column for each course and rows for each week in the session.
- For the month view, displays a one-month calendar in the grid; user can change the month as required.

Print Schedule

Formats the report in the current window for future sessions with at least one course scheduled or registered, and launches a print dialog box to print the student’s class schedule.

Return to Plan List

Closes the Scheduler screen and displays the list of plans.

Add Section

If the section time conflicts with another section in the schedule and there is no conflict override for the student (crsauth_rec.condition = CONFLICT and stat != V), the system displays a dialog box with a conflict message and OK button; otherwise, if the current time is between regtime_table beg_date/beg_tm and end_date/end_tm, the student does not have any absolute register holds, and the student has previously registered for at least one course, the system will register the student and update the stuplandtl_rec.sec_no with the selected section number.

Audit Section

If the section time conflicts with another section in the schedule and there is no conflict override for the student (crsauth_rec.condition = CONFLICT and stat !=

V), the system displays a dialog box with a conflict message and OK button; otherwise, if the current time is between regtime_table beg_date/beg_tm and end_date/end_tm, the student does not have any absolute register holds, and the student has previously registered for at least one course, the system will register the student as an audit and update the stuplandtl_rec.sec_no with the selected section number.

Add to Waitlist

Displays a dialog box with a Swap Course message and a dropdown box of registered courses and sections in this session (cw_rec.stat = R and grdg = LT or SU), including a no-swap option. This is prompting for the course and section to be dropped if a seat becomes available in the desired section. When the student clicks on a section, the system registers the course as a waitlist item. If waitlisted, the system inserts a row in rgwait_rec with the current course and swap course. If a waitlisted course is dropped, the system sets the rgwait_rec.stat = D. If the drop is unsuccessful, the system displays a message on the Holds & Warnings tab.

Remove

The remove button is used to drop or remove a course from the student's plan.

Drop

The system displays a pop-up status box. If the drop is successful and the course has a required lab or required concurrent course, the system drops the lab or concurrent course. The system also updates the course status message on the plan tab. If the drop is unsuccessful and the course has a required lab or required concurrent course, the system does not drop the lab or concurrent course, but displays a message on the Holds & Warnings tab.

Reports

Jenzabar provides several solutions to serve CX Module Name reporting needs. In addition to standard reports located on the CX Module Name menu, your institution can choose from a variety of reporting tools.

ACE Reports

The standard reports located in the Jenzabar CX menu system. You can access and run ACE reports from the menus to which they relate. For example, standard Module Name reports appear on the Module Name menu.

The initial screen that appears when you select a report prompts you to enter any required parameters for producing it. For example, to produce the Deferment Audit Report, you enter the session and year to be audited (e.g., FA96) and the subsidiary code.

For more information on running ACE reports, see *Producing Standard and Customized Reports* in the *Getting Started User Guide*.

Wait Swap List Report

The Wait Swap List report shows students on a waitlist for a given session and year.

Thu Jun 14 2010	Jenzabar University	Page 1
18:45	WAIT SWAP LIST	waitlist
	For FA 2007	
ART152 1 reg: 30/30 wait: 5/10		
Course#	Begin Date	Time ID Student Name Drop Crs Sec
-----	-----	-----
ART152	04/18/2007	15:43 123456 Maples, Marla
ART152	04/19/2007	10:23 123456 Scott, Francis PSY327 1
ART152	04/26/2007	16:13 123456 Monroe, Marilyn Marie ART152 2
ART152	05/04/2007	15:29 123456 Welch, Rachelle Marie
ART152	05/18/2007	9:23 123456 White, Barry

ART152 2 reg: 30/30 wait: 3/10		
Course#	Begin Date	Time ID Student Name Drop Crs Sec
-----	-----	-----
ART152	04/30/2007	10:57 123456 Smith, John
ART152	05/12/2007	11:35 123456 Chopin, Maria Mary
ART152	05/14/2007	17:19 123456 Jackson, Traci Lee



System Messages

This section provides the following:

- Descriptions of the status, warning, field error, and fatal error messages that can appear while you are using Module Name.
- Information you need to respond to the status, warning, and error messages

Message Types

Four types of messages can appear in any CX module. The messages appear on the comment line, on the error line, in a dialog box, or in your electronic mail. The types of messages are:

- Status message
- Field error message
- Warning message
- Fatal error message

The following describes each of the four types of messages, by degree of severity.

Status

Assures you that the program is working properly when you select an option that involves a long pause.

- Can appear after you select a command or option, type data, or press a key
- Appears on the comment line
- Requires no action by you

Example: "Opening files ..."

Field error

Informs you of an invalid field value entered, and provides you with valid field values from which to choose.

- Can appear after you enter an invalid code in a field
- Appears on the error line
- Requires that you select a valid code from those provided in the field error message, a table lookup, or a query, and enter it into the field

Example: Valid values: (A,I)

Warning

Informs you of a condition of which you must be aware in order to continue.

- Can appear after you select a command or option, type data, or press a key to begin or end a process that requires a decision
- Appears in a dialog box
- Requires you to act or make a decision
- Instructional; does not terminate processing

Example: Are you sure you want to exit? (Y/N)

Fatal error

Informs you of a serious problem occurring within the system.

- Can appear when the system is missing information (such as a required table or record) needed to continue processing, or when there is a program error
- Requires that you contact the Jenzabar coordinator immediately to resolve the problem
- Appears in a dialog box, or in your electronic mail, as well as in your Jenzabar coordinator's electronic mail
- Terminates processing

Example: "XXXX An unrecoverable error has occurred.
Contact your Jenzabar coordinator."

Electronic Mail Messages

Occasionally, Jenzabar programs send status or error messages to your electronic mail, as well as to the comment or error line. Programs do not send messages about background processes to the comment or error line, but only to your electronic mail. Such messages tell you any of the following information:

A process was completed successfully

When you see this message, you can delete or save them according to your preferences or established policy.

Errors have occurred while trying to complete a process

When you see this message, tell your Jenzabar coordinator about the message to resolve the problem.

Information cannot be found

When you see this message, try the process again with new field values.

Warning and Error Messages

The following list contains examples of some of the field error, warning, and fatal error messages that can appear when you use Module Name.

Warning messages do not affect program processing, while field error messages indicate problems you can correct by following the directions in the message. However, fatal error messages stop the processing of a program; if you receive a fatal error, contact your Jenzabar coordinator immediately.

Terminology

Term	Definition	Technical Note
certificate	<p>A series of academic credits or professional competencies providing accumulated knowledge in an area of study in lieu of a degree program.</p> <p>Requirements defined from the core group of Undergraduate or Graduate classes within a degree</p> <p>A student initially enrolled in a certificate program may switch to a degree program if broader knowledge is desired.</p> <p>A student initially enrolled in a degree program may switch to a certificate program if a smaller time commitment is desired.</p> <p>Qualifies for financial aid.</p> <p>Acts as a standalone credential like a degree.</p> <p>Does not imply “certification” with an outside agency.</p>	
COR100 student	A student enrolled in course number COR100 for the current session. This is a required course for all incoming freshman.	<code>cw_rec.crs_no = “COR100”</code> <code>and cw_rec.stat = “R”</code> and <code>cw_rec.yr = (current year)</code> <code>and cw_rec.sess = (current session)</code>
notices	A message to the notification system for a student or advisor.	
subprogram	A subprogram is a way to separate programs of study which operate in significantly different ways, such as being on a different calendar, being admitted differently, being charged differently, having different course offerings, etc.	



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