



JENZABAR CX

Academic Planner

User Guide

Tasks and Tools

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Getting Started

Introduction

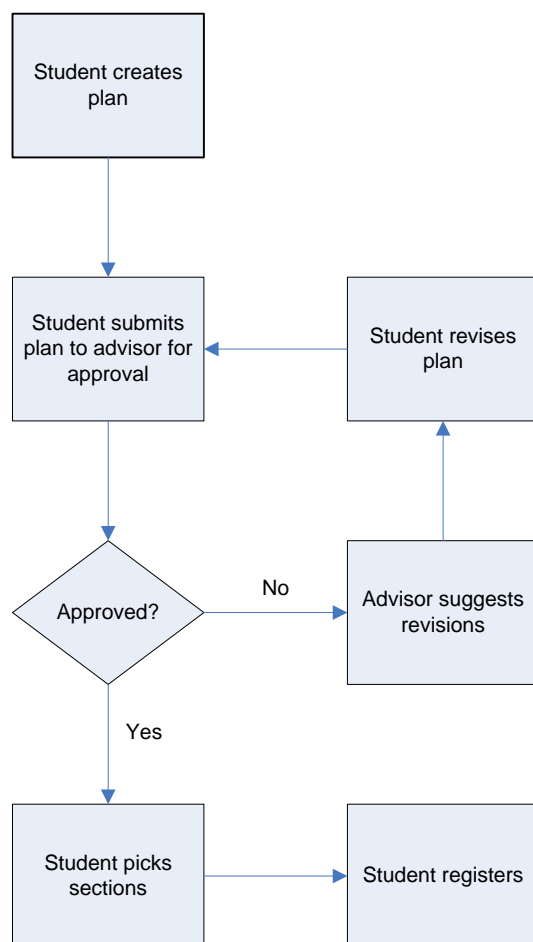
What is Academic Planner?

The Jenzabar Academic Planner provides a highly interactive Web-based option that meets the planning needs of colleges and universities offering traditional and non-traditional courses, both online and on campus. The Planner is designed to work with Jenzabar CX and within the context of CRM Student/Faculty. It enables even the most inexperienced users to plan coursework for any number of sessions, while simultaneously providing information to institutions regarding the need to plan for and offer courses at the most optimal times.

The Academic Planner is composed of two parts, the Planner and the Scheduler. The Planner is used by students to develop a new academic plan or edit an existing plan, by faculty to approve an academic plan and by staff to set up suggested plans. The Scheduler is used to pick sections in preparation of registration and to register for classes when the student's registration time arrives. Each plan includes options for major, minor, concentration, etc. The options do not have to match the options from the student records in CX. This allows the student to explore other academic options before committing to a change.

Process Flow

The following diagram shows the Academic Planner overall process.



Working with Plans

Within the context of Academic Planner, a *plan* is an organized grouping of curricula that, upon completion, provides the student with a degree, certification, or achievement of a specific goal. In other words, it is a roadmap for a student's studies for the upcoming academic sessions or terms, laid out in advance to ensure the student's goals are achieved and the appropriate coursework is completed on a timely basis.

When a student starts the Academic Planner, the student can either start a new plan or maintain an existing plan. After the catalog is available, an approved plan can be used to plan desired sections. It is important to remember that the student does not have a seat in the class until he/she registers at the designated registration time.

After one or more plans are created, each plan appears on the Plan List with the plan name and status. A new plan can be created, modified, or printed at any time. However, only unapproved plans can be deleted.

The system prompts the student to select academic options for a new plan and to provide a name for the plan. For a new plan, the options default from the student data in CX. The options can be changed at any time. The advisor sees a message if the options on the plan differ from the student record in CX.

Developing a Plan

After a plan is created and options are chosen, the student starts editing the plan on the Planner screen. The basic steps are to choose a course from one of the course selection tabs on the right side of the screen. When a course is chosen, information for that course is displayed below the course selection tabs, with course title and the sessions, years, location and instructional method for when the course is projected to be offered. The student can view the course description and any prerequisites in a message box. The student selects a session/year, which is added to the plan when the student clicks the session/year or drags the course number into a session/year when it is projected to be offered. The plan is shown on the left side of the screen. Informational messages appear in a series of tabs on the bottom of the screen. Status messages appear above the plan.

Approving a Plan

When the student is finished setting up the plan, the student clicks **Request Approval** to set up the plan for review with the student's advisor. With appropriate setup within CX via the Alternate Advisor Plan Permissions table (plnperm_table) as described in the *Academic Planner Implementation Guide*, the plan can optionally be set up for review with an instructor in the department of the student's planned major(s) or with another advisor (e.g., an instructor in the School of Education, if the student has selected a concentration flagged as teacher education).

When the advisor opens the Academic Plan Approval portlet, the system presents a list of advisees' plans which are ready for review, as shown below:

The screenshot shows the 'Academic Plan Approval' portlet. It includes a 'Student ID' input field and a 'Get Plans' button. Below this is a table with columns 'Advisee', 'Plan name', and 'Plan status'. Two plans are listed for 'Palmer, Carson, 202671': 'My First Plan' (Approved for Registration) and 'My Alternate Test Plan' (Not Approved). There are 'View Plan' and 'Print Plan' buttons for each row, and a 'Refresh Plan List' button at the bottom.

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

When a plan is selected, it is displayed on the Planner screen. This screen is the same as in the student view, except the advisor can only add comments and approvals; the advisor cannot update the courses on a plan.

Valid plan statuses are:

- Not-Approved – a plan the student is developing
- Pending-Department – awaiting approval from instructor in student's major
- Pending-Approval – student requests approval from advisor
- Revise – advisor reviewed the plan and found issues the student must correct
- Approved – advisor approved the plan
- Snapshot – when student updates an approved plan, a snapshot is taken by making a copy of the plan header, detail, log and comments.

Following is screen showing an example of a Not-Approved plan.

Academic Planner

Brook, Lisa My Plan Not Approved

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 collapse](#)

Fall 07 (13) COR200 3 CPS301 3 MAT321 3 PHY211 4 PHY211L 0	Interim 08 (0)	Spring 08 (13) COR274 1 CPS302 4 CPS302L 0 MAT232 4 PHY212 4 PHY212L 0	Summer 08 (3) COR275 3
--	-----------------------	---	----------------------------------

2008-2009 Academic Year [click to collapse](#)

Fall 08 (14) COR300 3 CPS220 3 CPS330 2 PHI200 3 REL212 3	Interim 09 (0)	Spring 09 (13) CPS320 1 CPS331 2 CPS402 2 CPS480 1 MAT351 3 PHY349 4 PHY349L 0	Summer 09 (4) CPS385 4
---	-----------------------	--	----------------------------------

2009-2010 Academic Year [click to collapse](#)

Fall 09 (12) COR400 3 CPS310 3 CPS310L 0	Interim 10 (0)	Spring 10 (11*) CPS210 3 CPS310L 0	Summer 10 (0)
--	-----------------------	---	----------------------

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

* You have less than 12 credits in Spring 2010
 Prerequisites for MAT201 may not be satisfied ([click for details](#))
 Prerequisites for PHY211 may not be satisfied ([click for details](#))

[Return to Plan List](#) [to Scheduler/Registration](#)
[Print Plan](#) [Request Approval](#)

Plan Options [click to expand](#)

Select Courses by:

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

Please consult the catalog for additional information

Graduation Credit Requirements

BA General Requirements

124 required hrs/54 hrs earned
GPA 4.000

Computer Science

35 required hrs/48 hrs earned
GPA

SOC250 Marriage and Family (3)

Course Details

Term	Location	Method
Spring 2008	Main Campus	Classroom
Spring 2009	Main Campus	Classroom
Spring 2010	Main Campus	Classroom
Spring 2011	Main Campus	Classroom
Spring 2012	Main Campus	Classroom
Spring 2013	Main Campus	Classroom

The Academic Plan Approval Portlet

The following image is an example of the initial screen an advisor sees when logging into the Academic Plan Approval portlet. While similar to the student's screen, the options differ. On the student screen, the options include "to Scheduler/Registration" and "Request Approval" while the advisor screen has "Needs Revising" and "Approve."

Academic Plan Approval

Palmer, Carson June 30th Pending Advisor Approval

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 collapse

Fall 11 (12)	Winter Session 12 (0)	Spring 12 (12)	Summer Session 12 (0)
IP BIO111 4		ART165 3	
IP BIO111L 0		BIO112 4	
BIO206 3		BIO112L 0	
ENG104 3		MUS152 2	
PED171 2		SPA102 3	

2012-2013 Academic Year click to expand

2013-2014 Academic Year click to collapse

Fall 13 (16)	Winter Session 14 (0)	Spring 14 (0)	Summer Session 14 (0)
BIO111 4			
BIO111L 0			
CHE111 4			
CHE111L 0			
HIS121 4			
PSY100 4			

2014-2015 Academic Year click to expand

Holds & Warnings

Comments

Approvals

Remove

Prerequisites for ENG104 may not be satisfied (click for details)

Prerequisites for PED171 may not be satisfied (click for details)

Print Plan

Return to Plan List

Needs Revising

Approve

Plan Options

click to expand

Select Courses by:

Requirements

Courses

Search

Grades

Please consult the catalog for additional information

Graduation Credit RequirementsX **Overall Audit - UG07** click to expand

124 required hrs/36 hrs earned/44 hrs planned

GPA 3.530

X **General Education - UG07** click to expand

55 required hrs/0 hrs earned/20 hrs planned

GPA

X **Biology Major** click to expand

30 required hrs/0 hrs earned/12 hrs planned

GPA

il
s

Print Plan Return to Plan List

Needs Revising Approve

Plan Options

click to expand

Select Courses by:

Requirements

Courses

Search

Grades

Please consult the catalog for additional

Choosing Sections

After the catalog for the next academic year is available and the student's plan is approved, the student can use the plan to select desired sections.

Note Choosing sections does not reserve seats.

Registering

When the student's registration time for a session arrives, the student clicks **Register** on the Planner screen to register for the chosen sections. For each section that is available, the student is registered and given a seat in the section. If the section is full, the student may choose to be put on the waitlist, using the command circled below.

Academic Planner

Brook, Lisa My Plan Approved for Registration

To begin, click on a term.

View By: Day Week Month

Fall 2007 13 credits registered

	Mon	Tue	Wed	Thu	Fri	Sat
7:00 am						
8:00 am	PHY211		PHY211	PHY211L	PHY211	
9:00 am	COR200		COR200		COR200	
10:00 am	Chapel		Chapel			
11:00 am						
12:00 pm						
1:00 pm	CPS301		CPS301		CPS301	
2:00 pm						
3:00 pm	MAT321		MAT321		MAT321	
4:00 pm						
5:00 pm						
6:00 pm						
7:00 pm						
8:00 pm						
9:00 pm						

Plan Options

Select Courses by:

Plan Requirements Courses Search

Grades

- ✓ COR200 Christian Faith:Issues & Culture
Registered in section 1
- ✓ CPS301 Data Structures & Lg Sftwr Sys
Registered in section 1
- ✓ MAT321 Abstract Algebra I (3)
Registered in section 1
- ✓ PHY211 Modern University Physics I (4)
Registered in section 1

Lab sections for section 1
PHY211L 1 ----R-- 7:45a-9:45a WG Trexler,F

PHY211 Modern University Physics I (4)

Course Details

Hold & Warnings Comments Remove

Working with a Suggested Plan

Introduction

Suggested plans typically originate with staff members. They are somewhat generic in that they are not tailored to the specific interests of a student, but instead target all students in a particular major or with a specific graduation goal.

Setting up Suggested Plans

Staff may use the Academic Planner to set up suggested plans. A student can then use a suggested plan to pre-load courses into a new plan.

The staff person selects a program and subprogram, as well as location, and then either selects an existing suggested plan to maintain or starts a new suggested plan. For the purposes of Academic Planner, 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.

The staff person selects a program and subprogram, as well as location, from dropdown lists, then either clicks **Get Suggested Plans** to populate the suggested plan dropdown box or selects **Start New Suggested Plan**.

Working with an Existing Suggested Plan

The staff person selects an existing suggested plan, and then selects one of the following commands:

- **Edit Suggested Plan** to open the suggested plan
- **Edit Options** to edit the suggested plan options
- **Print Suggested Plan** to produce a hard copy of the suggested plan
- **Deactivate Suggested Plan** to set the plan's status to Preliminary

Working with a New Suggested Plan

The primary Suggested Plan screen resembles the following:

Suggested Plans

Program: Undergraduate

Subprog: Underg. Traditional

Location: Main Campus

Suggested Plan: BS plan templ Not Approved Not Approved

Buttons: Get Suggested Plans, Edit Suggested Plan, Edit Options, Print Suggested Plan, Start New Suggested Plan, Deactivate Suggested Plan

To start a new plan, the staff person selects **Start New Suggested Plan**, which opens the Suggested Plan Options screen shown below. After the options are saved, the Build screen opens. The staff person builds the suggested plan in the same way a student builds a plan.

Suggested Academic Plans

Starting year/session: 2012 Fall

Degree: Bachelor of Science

Catalog: UG12 2012-2013 Year

Major: Biology

Suggested Plan Name: BIO FA12

Buttons: Cancel, Save Options

Working with Suggested Plans

To work with a suggested plan:

Launch the Suggested Plan list. The system displays dropdown boxes for program, subprogram, and location. Programs, subprograms and locations show on the list if they meet the following criteria:

Criteria	Requirement
Program	prog_table.prog and txt that are active and have a web_display value of "Y"
Subprogram	subprog_table.subprog and txt that are active and have a web_display value of "Y"
Location	campus_table.campus and txt that are active and have a web_display value of "Y"

After the user selects search criteria, the **Get Suggested Plans** command loads plans matching the program, subprogram, and location options. The suggested plans appear in the Suggested Plan dropdown box.

The user selects the desired plan, and selects **Edit Options** to launch the Suggested Plan Options screen.

At this point, the user can select from various command options, as follows:

Print Suggested Plan

Sets up and prints the suggested plan in a format similar to a student plan.

Start New Suggested Plan

Launches the Suggested Plan Options screen.

Deactivate Suggested Plan button

Sets stuplan_rec.stat to W and stat_date_time to the current date and time.

Load Suggested Plan Options screen

Opens the setup screen with dropdown boxes and text box for the suggested plan. Dropdown options include:

Option	Values
Starting year	The current year – 3 through the current year + 6 (e.g., if the current year is 2011, values might be 2008 – 2017)
Starting session	Fall, Spring, Summer
Degree	Values from deg_table.deg and txt that are active
Catalog	Values from the cat_table and txt that are active and have a web_display value of “Y”
Major	Values from the major_table.major and txt that are active

Notes:

- For any existing plan, the current values become the default values.
- A Description field provides for free-form entry.
- All fields are required unless subprog_table.prog is GRAD; if subprog_table.prog is GRAD, the Major field can be blank.

Messages on the screen include:

No Name

The name field has been left blank, and the cursor moves to the name field.

No Major

The Major field has been left blank (and the prog is not GRAD), and the Major dropdown is the active field on the screen.

Commands

Save

If the suggested plan is new, the system adds a stuplan_rec with id = plan_no + 99,000,000 (e.g., 99,000,004), a status of Preliminary, the designated options, and the suggested plan name. It then loads the Suggested Plan Build screen.

If the suggested plan previously existed, and if the plan name has changed, the system first verifies that the new name does not already exist. It then updates the stuplan_rec with the new values and the suggested plan name, and launches the Suggested Plan List screen.

Cancel

Discards the changes and launches the Suggested Plan List screen.

Working with the Suggested Plan Build Screen

Screen Elements

The Suggested Plan Build screen contains the following elements:

- The top line contains the subprogram, starting year, starting session, degree, major and text from stuplan_rec.
- Set up tabs on right side of screen provide access to requirements, courses, and search.
- The left side of the screen displays academic years from the starting year/session to highest course projection year/session. Within each academic year, the screen displays sessions to match the calendar type of the subprogram.

Commands

Command buttons for the Suggested Plan Build screen are:

Copy button

Displays a dropdown box showing the campus and description, where starting year, starting session, subprogram, 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.

Return button

Loads the Suggest Plan List screen.

Activate button

Sets the stuplan_rec.stat to A and stat_date_time to the current date and time; loads the Suggested Plan List screen.

Print button

Sets up and prints the suggested plan in a format similar to the student plan.



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