



EduNav SmartPlan Counselor Manual

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About EduNav SmartPlan

EduNav SmartPlan is a degree planning tool to help you easily build and share degree plans with students, and to review student degree plans.

SmartPlan enables students to plan and register for all their courses in a guided, intuitive system personalized to their needs and preferences. In SmartPlan, students can quickly:

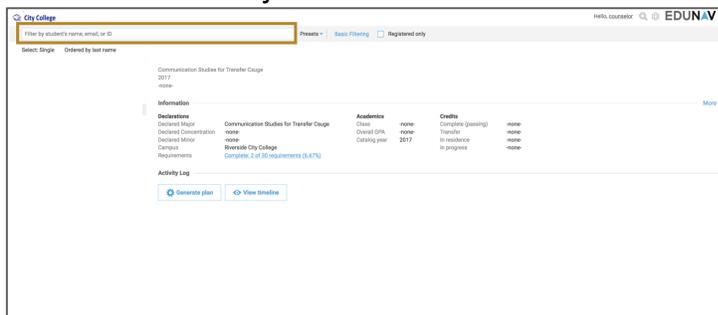
- Visualize their pathway to completion, term by term
- See when they are expected to graduate – and understand how any changes to their plan affect the completion timeline
- Plan, schedule and register for all courses in one intuitive interface
- View their entire academic history including any already articulated courses

Advisor dashboard

The advisor dashboard enables you to search for and see assigned students and their progress toward their degrees. You can find students through using the search box or clicking on the Advanced Filtering link to the right of the search box. Results will appear on the left-hand side of the screen.

Search for student

To search for a student, type their ID number or name into the search box. A list of students meeting that criteria will appear in the left column of the screen. You can then select the student you seek.



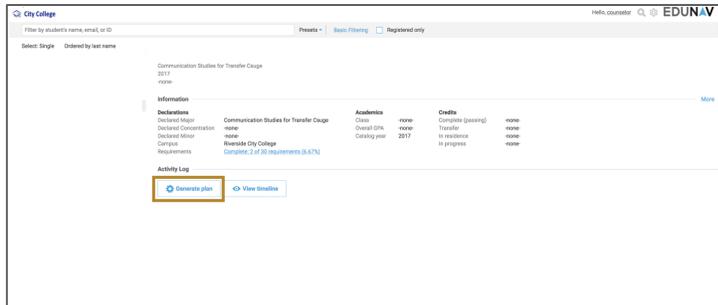
The screenshot displays the EduNav SmartPlan interface for a student's degree plan. At the top, there is a search bar with the text "Filter by student's name, email, or ID" and a "Basic Filtering" button. Below the search bar, the student's name "Communication Studies for Transfer Degree" and the year "2017" are visible. The main content area is divided into sections: "Information", "Academic", and "Credits". The "Academic" section contains a table with the following data:

Class	name	Complete (passing)	none
Overall GPA	none	Transfer	none
Catalog year	2017	In residence	none
		In progress	none

The "Credits" section shows "Complete 2 of 30 requirements (0.67%)". Below the table, there is an "Activity Log" section with two buttons: "Generate plan" and "View timeline".

Generate plan for student

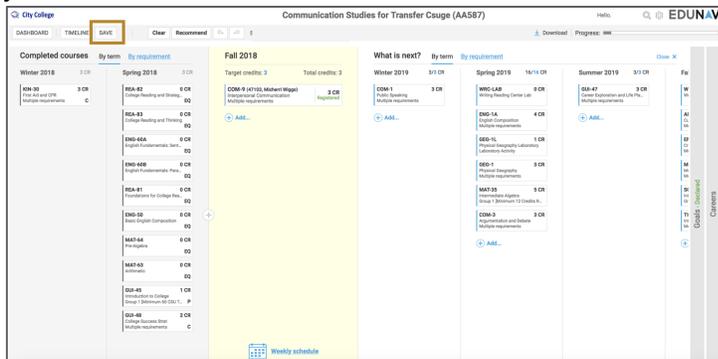
To generate a plan for a student, select them in the advisor dashboard, and click on *Generate plan*. You will be prompted if you'd like to make a part-time or full-time plan for that student, and then it will take you to the plan for that student.



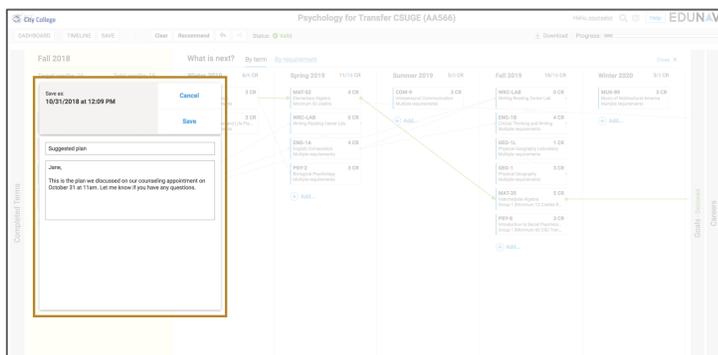
Counselor-only functionality

Save a plan to the student's timeline

To save a plan to a student's timeline, click Save from the menu bar once the plan is edited to your satisfaction.

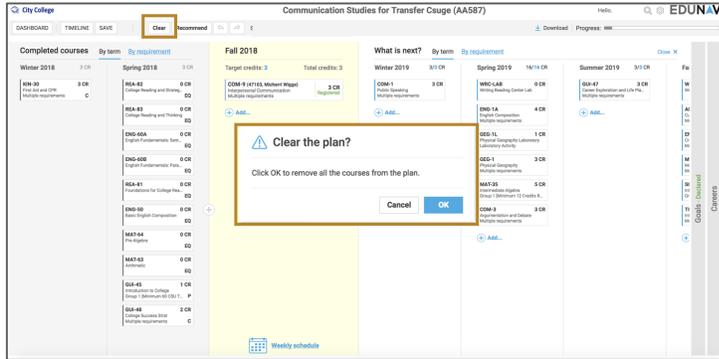


You will have the opportunity to name the plan and include comments to the student when you save.



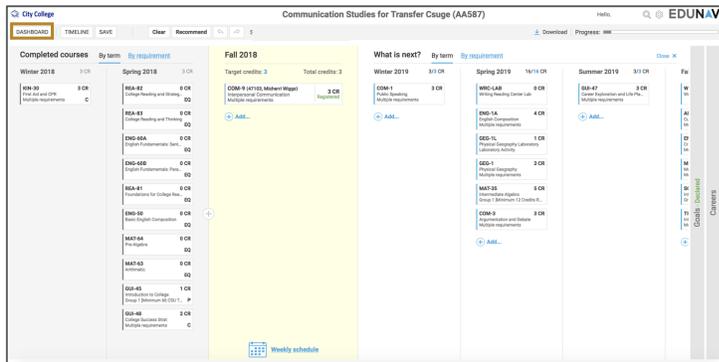
Remove all courses from plan

If you would prefer an empty template and build a plan from scratch, press the *Clear* button. You will receive a dialog box asking you to affirm you'd like to delete all courses from the plan. Click OK.



Return to advisor dashboard

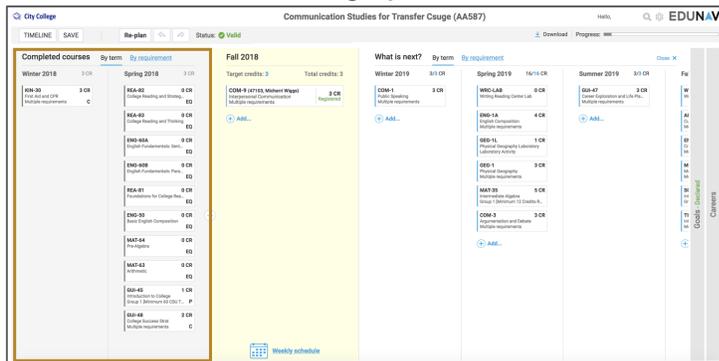
To return to the advisor dashboard to select another student, click the Dashboard button in the menu bar.



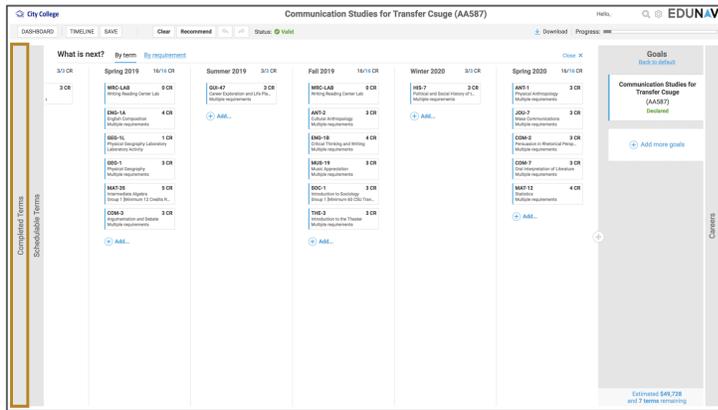
Common student/counselor functionality

View academic history

In SmartPlan, each term is represented chronologically in a column. Terms with completed or articulated courses will be gray. These terms can be seen to the left when you enter the system.

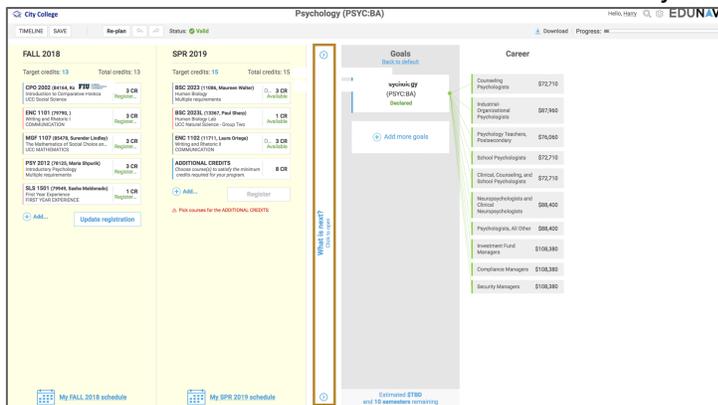


If academic history is collapsed, it can be seen by clicking the *Completed Semesters* bar on the left of the screen.



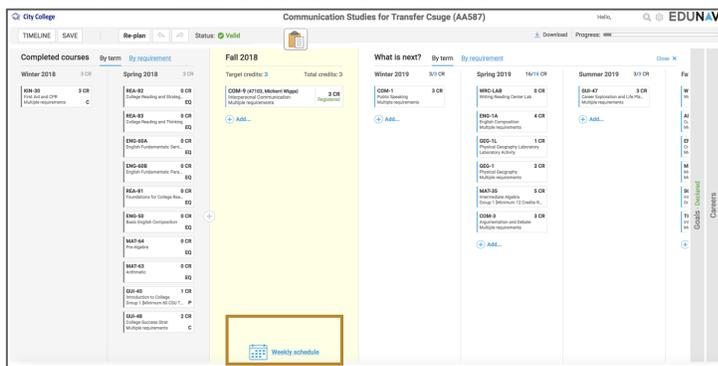
View future semesters

Upon entering SmartPlan, click on the *What's Next?* bar to the right of the yellow current schedulable terms to see all future terms all the way to student's goal.



Open weekly schedule

To view the weekly schedule view for the current or schedulable term, click on the *Weekly schedule* link at the bottom of the column.



Valid / not valid functionality

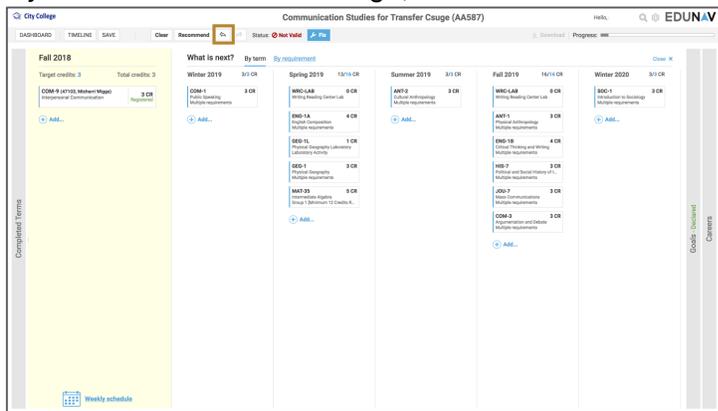
Every time you make a change to your plan, SmartPlan checks to see if the plan is still *valid*. A valid plan is one that meets the student's graduation requirements and that the student can register for.



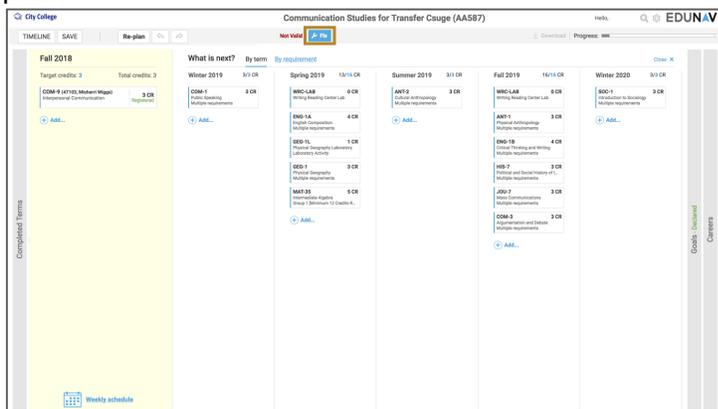
If you make a change that invalidates the plan, the status in the menu bar will change to Not Valid and a *Fix* button will appear.



If you want to undo the change, click the *Undo* button.



If you want SmartPlan to try to fix the plan, click the *Fix* button. If the system can fix it, the status will change to Valid, and SmartPlan will display a dialog box noting that it fixed the plan. If it cannot fix it, either click Undo or Recommend, which will cause SmartPlan to regenerate a valid plan.



You can make multiple changes (add a class, move a class, change an instructor, etc.) at once and wait for SmartPlan to validate all your changes.

Change time / instructor

From the plan view

Hover over the course in the schedulable term you would like to change. Click *Change*, and then select *Change time/instructor*. A pop-up window will open which shows all other available options.

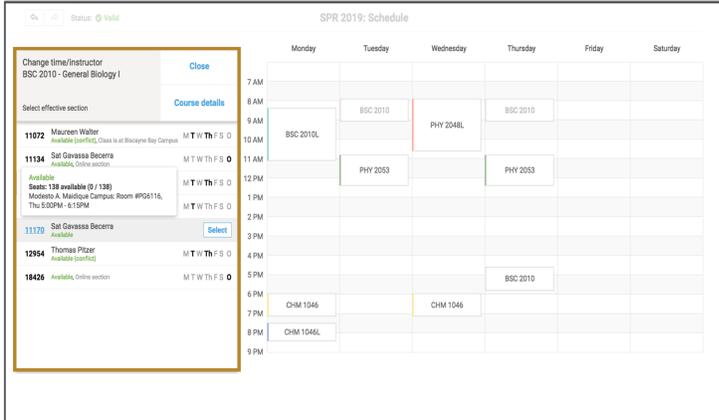
The screenshot shows the EDUNAV plan view for Communication Studies for Transfer Course (AAS87). The interface includes a navigation bar with 'Dashboard', 'Timeline', 'Save', 'Clear', 'Recommend', 'Status', and 'Valid'. The main area displays a grid of courses across semesters from Fall 2018 to Winter 2020. A pop-up window titled 'Laboratory Activity' is open, showing a list of courses for selection. The 'Change course (2 Requirement(s))' and 'Keep, but not in this term' options are highlighted with orange boxes.

From the Weekly schedule view

Hover over the course you would like to change in the course list. Click *Change*, and then select *Change time/instructor*.

The screenshot shows the EDUNAV Weekly schedule view for SPR 2019. The interface includes a navigation bar with 'Status' and 'Valid'. The main area displays a grid of courses across days of the week (Monday to Saturday). A pop-up window titled 'Change course (2 Requirement(s))' is open, showing a list of courses for selection. The 'Change course (2 Requirement(s))', 'Change time/instructor...', and 'Keep, but not in this semester' options are highlighted with orange boxes.

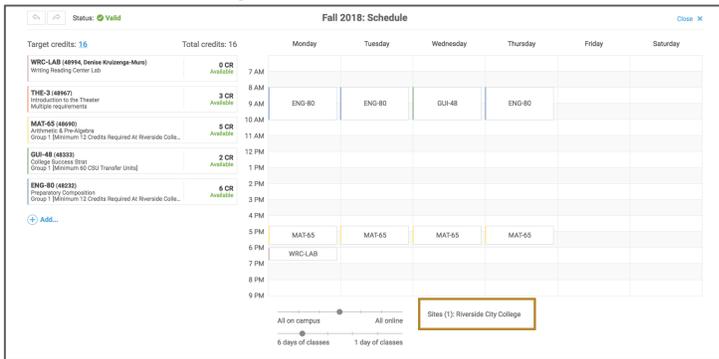
A pop-up window will open which shows all other available options. As you hover on the options, you can quickly see how they would fit in your weekly schedule. Click *Select* next to the class you'd prefer, and the plan will automatically update to reflect your change.



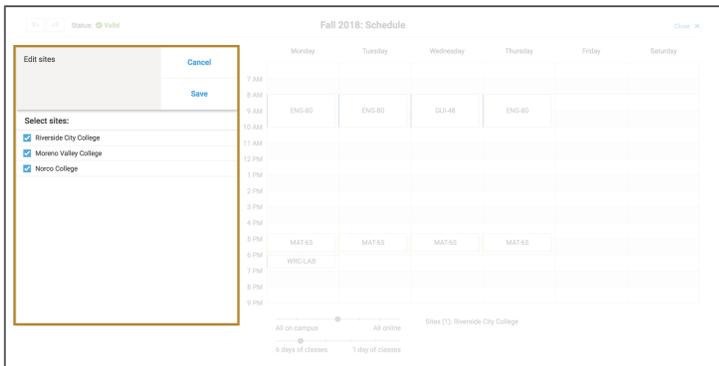
Plan courses from multiple colleges

When you click *Add* in either plan or schedule view, SmartPlan will let you choose courses from any college, but when it plans courses, it only uses courses from the student's home college.

To have SmartPlan build a plan using courses from other colleges, click on the current site listed in the Weekly Schedule.



A dialog box will appear and you can select the college or colleges you want SmartPlan to use to plan the courses.

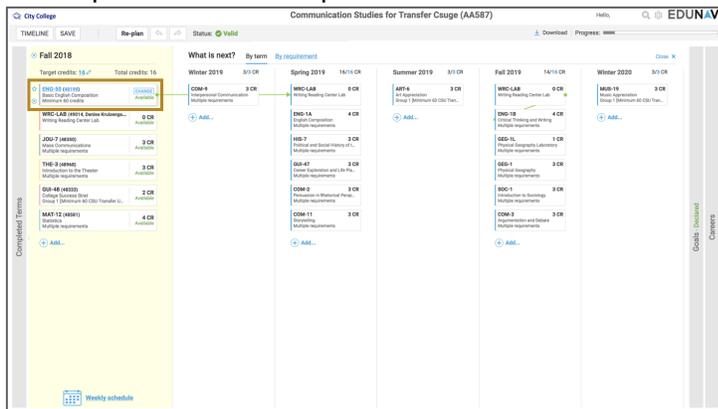


Keep or remove a course

Students and counselors can keep or remove courses. Simply hover over the course you would like to keep or remove.

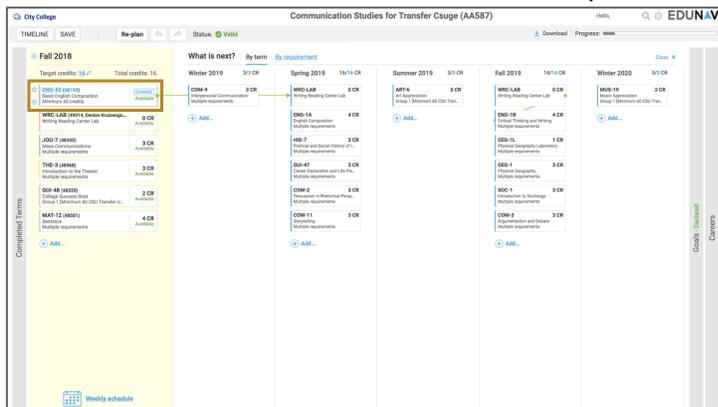
To keep a course, click the star to the left of the course to express a preference to keep it. This will mark the course with a small star. This tells SmartPlan that that you would prefer this course to remain in the education plan over others that meet the requirements. SmartPlan will then do everything it can to keep that course — and keep it in the selected term — whenever it updates. Assuming the course is part of a valid plan, there's little risk of it moving, unless the student fails to pass a prerequisite, the course is not offered, or the course fills prior to registration. In these cases, SmartPlan will declare the plan invalid, but will not change it unless the student asks SmartPlan to fix the plan or recommend a new one.

To remove a course from your plan, click the small x located to the left of the course. This will remove the course from the current plan, and tell SmartPlan that you would prefer that course not be planned when it updates.



Replace a course

Hover over the course you would like to remove. Click the small x located to the left of the course. This will remove this course from the plan.



The system will then check to ensure your plan is still valid. You can always check the status on the menu bar to see the current state of the plan.

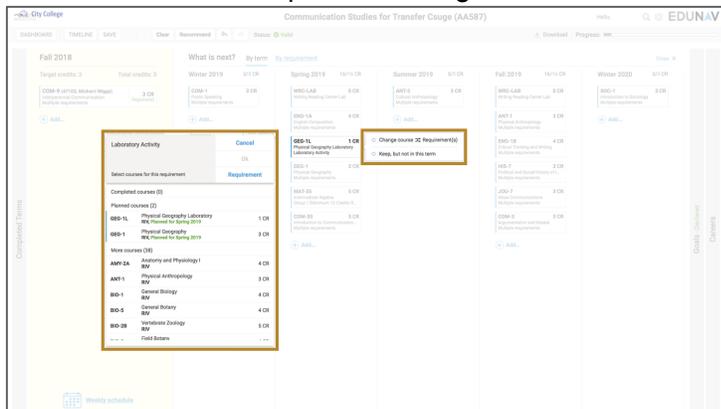


A pop-up window will open which shows all other available options that meet that requirement.

Hover over the course you'd prefer the student to take and select *Use*.

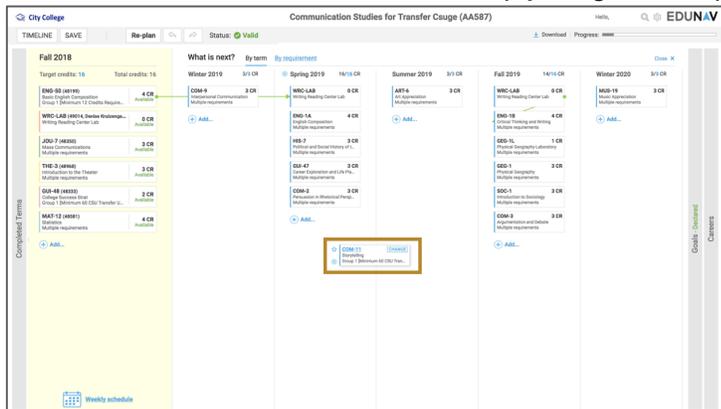
Change course for requirement

Hover over the course you would like to change. Click *Change*, and then select *Change course requirement*. A pop-up window will open which shows all other available options. Hover over the course you do not want and select *Don't use*. Hover over the option you'd prefer, click *Use*, and then click *OK* at the top of the dialog box.



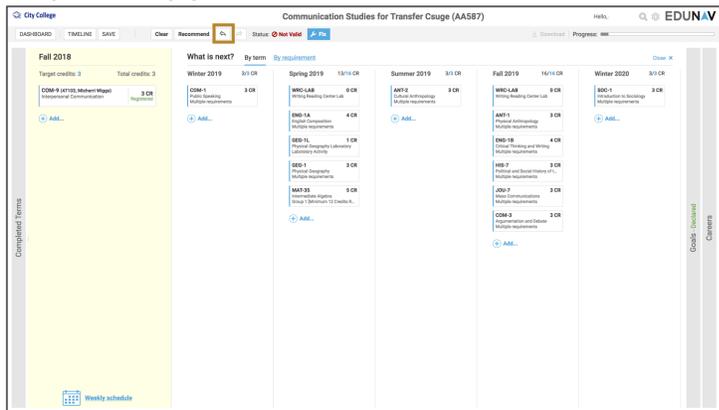
Move course to another term

To move a course to another term, simply drag and drop the course to a desired term.



Undo last action

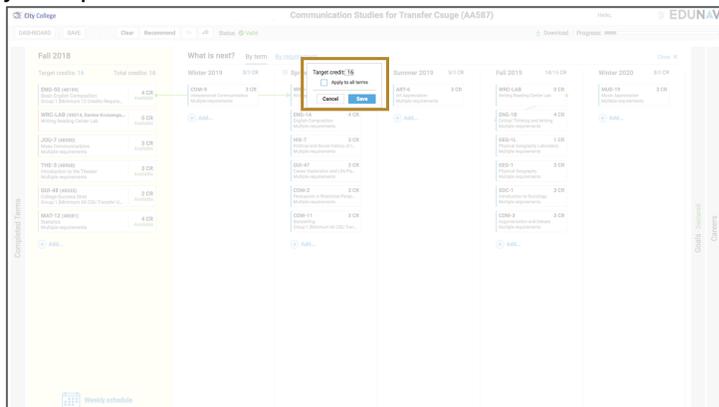
If the plan becomes invalid or you would simply like to undo the last action you took in customizing the plan, simply click the undo button in the toolbar.



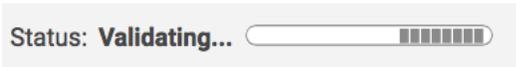
Edit target credits (units)

The number of credits (units) scheduled and target credits (units) planned can be seen at the top of each term. The first number listed is the number of credits currently planned. The second blue hyperlinked number is the target credits for that term.

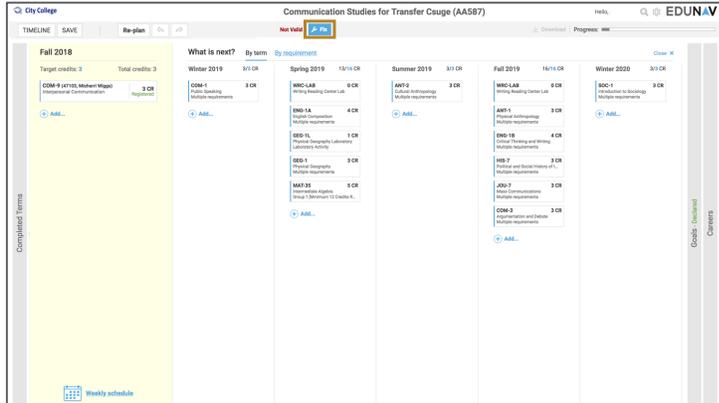
To change the target credits, click the blue hyperlink number and type the number of credits you'd prefer to take.



The system will then check to ensure the plan is still valid. You can always check the status on the menu bar to see the current state of the plan.

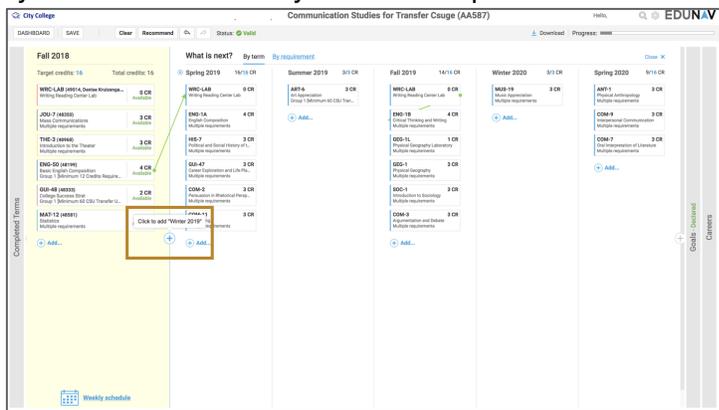


If it indicates that the plan is now not valid, simply click the blue fix button on the toolbar to have SmartPlan return you to a valid plan.



Add a term

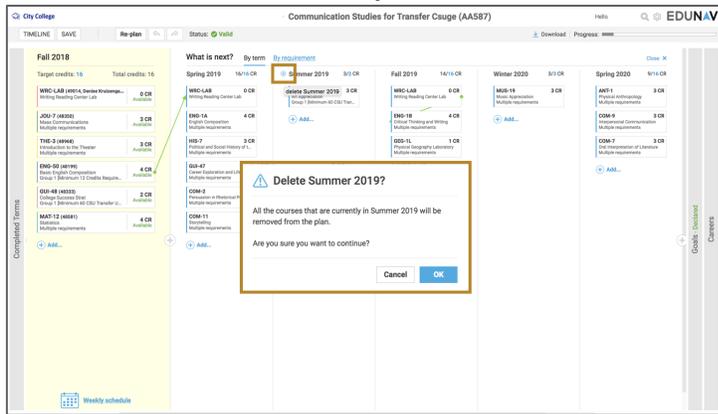
Additional terms that can be added to the plan will be denoted as a + sign between the semesters where the term is available. To add a term to the plan, simply click on the + sign. The system will immediately build a new plan with that term added.



Remove a term

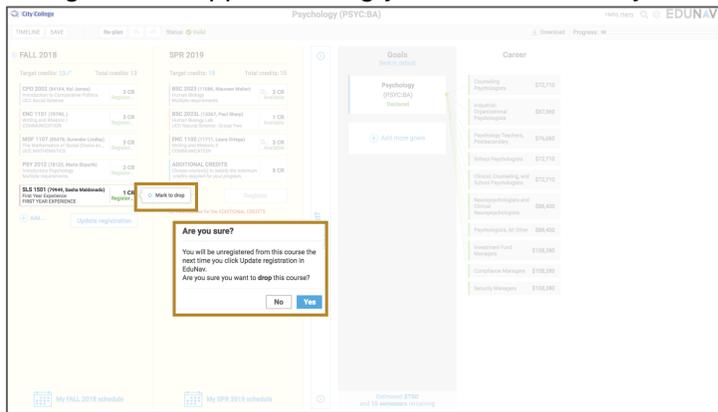
To remove a term, simply drag and drop each of the courses in that term to other terms. Once the term has no courses remaining, click the x to the left of the term name (e.g. SUM 2019) to delete from the plan.

You will be asked to confirm you want to continue with deleting the term. Click OK.



Drop a registered course

Hover over the course you would like to drop. Click *Change*, and then select *Mark to drop*. A dialog box will appear asking you to confirm that you wish to drop the course. Click Yes.



The course will now appear faded and a text box with the word DROP will appear. Click *Update registration* to complete the action.

