Smart Planner/Degree Search

<table>
<thead>
<tr>
<th>Module:</th>
<th>Degree Tracker</th>
</tr>
</thead>
<tbody>
<tr>
<td>Business Process Name:</td>
<td>Degree Tracker Testing</td>
</tr>
<tr>
<td>Created/Edited By:</td>
<td>Kathy Godwin/Heather Jepsen</td>
</tr>
<tr>
<td>Creation Date:</td>
<td>December 12th, 2011</td>
</tr>
</tbody>
</table>
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Business Analyst Contact Information

<table>
<thead>
<tr>
<th>Eller</th>
<th>Brad Hensley</th>
</tr>
</thead>
<tbody>
<tr>
<td>Humanities</td>
<td><a href="mailto:helsleyb@email.arizona.edu">helsleyb@email.arizona.edu</a></td>
</tr>
<tr>
<td>PSIO</td>
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<tr>
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<td></td>
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<tr>
<td>Public Health</td>
<td></td>
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<tr>
<td>Social &amp; Behavioral Sciences</td>
<td></td>
</tr>
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<td>Science</td>
<td></td>
</tr>
<tr>
<td>Agriculture</td>
<td>Heather Jepsen</td>
</tr>
<tr>
<td>Architecture</td>
<td><a href="mailto:jepsenh@email.arizona.edu">jepsenh@email.arizona.edu</a></td>
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<td>Fine Arts</td>
<td></td>
</tr>
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<td>UA South</td>
<td></td>
</tr>
</tbody>
</table>

1. **Logging In and Navigating to the Smart Planner:**
   a.  http://www.uaccess.arizona.edu
   b.  Navigate to **Main Menu > Academic Advising > UA Planner > Student Planner**
       OR
       **Main Menu > Campus Community > Student Services Center**
       (click on the Smart Planner link on the left side)
   c.  Log in with your NetID and password
2. **Analyzing a Student Case:** Students and Advisors have the ability to choose a career path for students who do not have a Subplan and/or Specialization (student group) established. If a student has declared a plan but is not sure what subplan and/or Specialization they would like to declare, in the future students will have the option to select [I’m not ready to choose yet.]

(Future Enhancement: When students are 80% complete with the common default plan the Smart Planner will not continue until the student has chosen a subplan or specialization.)
a. After Subplans and/or Specializations are in place the engine will run and a suggested sequence will be displayed. Below is an image of the main Smart Planner View.

b. This page displays plan, EMPLID, if the student is honors, the number of semesters a student needs to complete, the future planned semesters with the courses suggested, and the buttons to access other areas of the Smart Planner.

i. On the Smart Planner main page requirements are broken down in to future semesters.

A. Requirement-The course required for each line.

B. Notes - If the requirement line has a note, you can hover over or click this icon and the message will display in a pop up window:

C. Check Point - If the requirement is a check point course, you will see a icon

D. Units - The average number of units assumed for each requirement will be displayed if a specific course is not selected. The actual number of units for the requirements will be displayed if the course is selected.
E. Course - This will have either the course selected to meet this requirement listed OR the words “Not Selected”. You can adjust this course by clicking the link under the column labeled Select Course.

F. Info - When a specific course has been selected for a requirement an icon will appear. When this icon is clicked the course description, pulled for the course catalog, will be displayed.

G. Select Course – This section will allow you to choose a specific course from a list of available options. There will be different course selection screens depending on the type of requirement course.
   a. General Courses: This course selection page is used to choose the course you would like to meet a particular requirement for a major or gen ed requirement.
      1. Click on the Select hyperlink and the following page will appear:
         
         ![Course Selection Page]
         
         2. The courses displayed will list course title, course number, the amount of units, course attributes, and whether or not the course is [CURRENTLY FULL] at that point in time. If the course is full it can still be selected and used in the Smart Planner.
         3. You can simply select the course you would like or use the filters to narrow down your search. The filters are helpful when the course list is extremely long.
   b. Elective Courses: If a department includes Elective lines in their sequence those lines will automatically fill in with
coursework from the students’ Additional Coursework section on the Advip. A list of Elective lines that are automatically filled in will appear at the bottom of the Smart Planner main page. These lines can be clear and restored back up in to the Smart Planner suggestions by clicking on the Clear link.

If a student does not have courses in their Additional Coursework section the lines will need to be filled in manually. The select link for Elective courses will take you to a page that lets you choose from the catalog or from a list of courses the student has already completed or enrolled in that don’t apply to any required lines.

If a department has designated an Elective line to be upper division the Smart Planner will only display or use upper division courses.

NOTE: Adding a course to your requirement list that has a different number of units than was assumed for that requirement may cause the Smart Planner to readjust other requirements based on number of units being added.

c. Minor Courses: A student or advisor can use the drop down option at the top of the page to plan for a course from the course catalog. If a plan has built in lines for a required minor, and the student has a minor declared, courses that
have been completed or enrolled in can be used for those lines.

d. Once a completed or currently enrolled course for a minor or Elective course has been chosen to fulfill a requirement line it will then appear at the bottom of the Smart Planner main page.

e. You can adjust any course that was previously selected by again clicking on the Select hyperlink.

1. At the top of the page you will see a Clear Selection button: [CLEAR SELECTION: AEC 310].

Clicking on this button will clear out your old selection and allow for a new one.

H. Locked - If a course is locked, the engine will not move the course if it rearranges the course suggestions. A course can be locked for various reasons: it was placed in to a specific semester on the Arrange My Plan page, it’s a co-requisite, the lock option is clicked, or it’s chosen by the “Add Course” option.

I. Advisor Message - This feature will allow an advisor to create a note for a specific requirement. Clicking on the pencil icon will take the advisor to a page where they can enter a note. After clicking OK a piece of paper icon appears behind the pencil to indicate a note has been entered. The advisor can edit the note by clicking again on the pencil. Students can view the note by clicking on or hovering over
J. Postpone—This feature will allow students and advisors to postpone a requirement from their Smart Planner suggested sequence.

A requirement can be postponed by clicking on the “X” in the corresponding row. When clicked messaging will appear letting the student and advisor know that the course is not being removed from their plan or schedule.

Requirements that have been postponed are moved to the bottom of the Smart Planner main page and display who postponed the course and include a timestamp. Postponed requirements can be restored back up in to the Smart Planner sequence by clicking on the Restore link.

c. Overlapping Requirements—If a student has declared more than one plan (major/degree/minor) there may be a chance that plans would contain the same
requirements. If the requirements are exactly the same, the Smart Planner will remove one of the overlapping requirements and move it to a section at the bottom of the main Smart Planner page.

![Overlap Requirements Table](image)

d. Unassigned Requirements- In some cases there may be a section above the predicted semesters titled “Unassigned Requirements”. In most cases there are not enough semesters or units in a semester for the unassigned course to be placed. Courses may also appear here if a student has not completed the necessary pre-requirements or if a student does not have Math or English placement scores. If a student has the correct placement score(s), pre-requirement(s), or if adding another semester and/or increasing the units in the “Edits Preference” page does not assign the requirement, and it’s not a block planned course, please let the appropriate Business Analyst know because there might be an error.

![Unassigned Requirements Table](image)

i. At the top left side of the Smart Planner view page there are three hyperlinks:

   A. **Help**: This will open Smart Planner FAQ’s in another window so that you can continue working in the Smart Planner but get your questions answered about a particular topic.

   B. **Demo**: This link opens to a video demonstration of how to use the Smart Planner.

   C. **Feedback**: This opens up a page where you can place suggestions or send issues to the Degree Tracker team.
ii. On the right side you will see five links:

A. Advisor View - will take you to a screen that will display the logic behind the Smart Planner suggestions (see page 15).

B. Advisor Notes Link* - will open up advisor notes if there are entries that have been created for the student.

C. Create Planner Notes* - will open up a new note entry with the DT note category prepopulated. **Anything typed in the comment section will appear to the student at the top of the Smart Planner main page.**

D. Exceptions* - takes you to the UA Exceptions Summary page.

E. Advising Report Link - will open up the student’s advising report in a new window.
   * You will need the appropriate security to be able to view/access these pages.

e. There are also many ways to adjust these requirements and suggested sequence that will be explained in the next few items.

A. If you want to add an additional course to a particular semester for a minor or additional major that has not yet been declared, select **Add Course**. You will then be directed to the course picker page. This page references the course catalog.
   a. Adding an additional course: By clicking on the link under each term on the main view page of the Smart Planner, this feature allows you to plan for additional courses.
b. This will allow you to add any course from the course catalog. To do this:
   - Find the Subject you would like to add using the subject drop down.
   - Next Select the Catalog Number using the Catalog Nbr drop down.
   - Hit the ok button.
   - This course will now be added to your requirement list.
   - This course will also be locked which will prevent it from being moved from the term you selected.

NOTE: Adding a course to your requirement list may cause the Smart Planner to readjust other requirements based on number of units being added.

B. Edit Preferences Page: Clicking on Edit Preferences will take you a screen where you can add or delete terms and change the amount of units for each term.
   a. Here you will see the defaults set by each major. The average number of units students take to complete their major
   b. To remove a term simply hit the next to that term.
   c. To add a term, select the button.
d. You will get an empty box:

![Empty Box](image)

e. Use the Drop Down to find the term you would like to add. All available terms will be displayed.

![Term Drop Down](image)

f. Select the term you would like to add*.

*If a plan has built in a required summer term the Smart Planner will automatically suggest courses in the summer terms.

g. Insert the number of units for the term.

![Units](image)

h. To adjust the number of units you would like to plan for in a term, change the Target Units value.

![Units Table](image)

i. When you feel that you are done adjusting the Term and Unit Preferences click **OK**.

j. If you feel you have made adjustments that you do not want, select **Reset Defaults**. This will adjust the preferences back to the major’s defaults.

C. If you want to rearrange the order in which requirements are displayed you select **Arrange My Plan**

a. Arrange My Plan page: This page allows you to move rearrange course and move courses from one term to
b. Find the requirement you would like to have moved.
c. Click on that course and Drag it to the desired term

d. Notice Fall 2012 units went from 15 to 12, and Spring 2013 in now in red. The red header is just an indication that the planned units are now more than what was originally the total target units. Semesters can contain up to 19 units unless the student’s term max has been increased.
e. Make note that any requirement that is a pre-requisite or a co-requisite to other courses are marked with PREREQ or COREQ. These courses will be harder to adjust as
they need to be in a certain order. If you move something that is a PREREQ to a requirement below that requirement you will get an error and will have to correct this before moving on.

Example:

1. In this example AREC 304 was moved to a term later than AREC 464 and AREC 403. This requirement must be taken before the other two. AREC 304 would need to be moved to a term earlier than Spring 2015.

2. Anytime you move a requirement to a different term this requirement will be locked into that term. This will prevent the Smart Planner from continually moving it back to the original designated term predicted. The lock column can be seen on the main Smart Planner page.

f. If the plan requires that the courses be completed in a cohort group, you will see [COHORT] on the line. Because these requirements are designed to be completed together and not moved around, only advisors will be able to move requirements with this label.
### Unassigned Requirements (unassigned units: 3)

<table>
<thead>
<tr>
<th>Course</th>
<th>Units</th>
</tr>
</thead>
<tbody>
<tr>
<td>TTE 301: Child Guidance &amp; Classroom Management (Birth-Age 8)</td>
<td>2</td>
</tr>
<tr>
<td>TTE 299E: Foundations</td>
<td>1</td>
</tr>
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</table>

[Cohort: Only advisors can move this requirement]

### Fall 2013 (planned units: 6, target units: 16)

<table>
<thead>
<tr>
<th>Course</th>
<th>Units</th>
</tr>
</thead>
<tbody>
<tr>
<td>EDF 358: Methods Educational Assessment</td>
<td>3</td>
</tr>
<tr>
<td>TTE 329: Early Childhood Education Foundations (Birth-Age 8)</td>
<td>3</td>
</tr>
</tbody>
</table>

[Cohort: Only advisors can move this requirement]

### Spring 2014 (planned units: 2, target units: 9)

<table>
<thead>
<tr>
<th>Course</th>
<th>Units</th>
</tr>
</thead>
<tbody>
<tr>
<td>TTE 301: Child Guidance &amp; Classroom Management (Birth-Age 8)</td>
<td>2</td>
</tr>
<tr>
<td>TTE 301</td>
<td>2</td>
</tr>
</tbody>
</table>

[Cohort: Only advisors can move this requirement]
f. Smart Planner Report Page:

i. This is the view of the recommended sequence for your major. This page will allow you to see which courses in the plan’s recommended sequence have been completed, in progress, planned, and still needed. The notes and checkpoint requirements are also noted here as they are on the main Smart Planner View.

ii. The major(s) and minor(s) will all be listed at the top under My Major. If a smart planner is available for that particular major or minor you will see a Yes indicator. If it is not, you will see a No indicator.

iii. Second/Third Majors and Double Degrees: If a student is enrolled in multiple majors, the Foundation and Gen Eds will be displayed for the primary major plan only in addition to the major, elective and minor courses in the Smart Planner report. The second and third plans will only display major, elective, and minor courses. Plans are listed in alphabetical order on this page.

iv. You will also see a legend toward the top of the page. This is used to indicate the status of the courses.
A. Completed-If a course is completed the course taken and a grade will appear in the course column.
B. In progress- The student is currently enrolled in the course.
C. Planned-A specific course has been planned in a future semester
D. Needed-There is more than one option for the course requirement, so the student or advisor will need to go in and choose which class they would like to take. Once a class is selected on the main Smart Planner page the status will change from Needed to Planned.
E. Postponed or Overlap- These are requirements that have been postponed from a Smart Planner sequence or requirements that overlap with one another.
F. Checkpoint-The requirement has been indicated as a checkpoint by the department.

i. In some cases Additional Requirements may appear before the Recommended Sequence section. These additional requirements are any course that requires a placement score (Math, English, and Second Language). The amount of additional requirements will depend on what the department has accounted for in their sequence and the students placement score.

ii. Clicking Close at the bottom of the page will take you back to the Smart Planner main page.
g. **What-If Report**: This will allow students and advisors to choose what-if plans and see how their completed requirements apply.

i. When the button is clicked, users will be sent to a page where they can choose their desired new plan.

![Create Smart Planner What-If Report](image)

ii. After choosing a plan the student’s completed requirements will be applied to the What-If scenario.

iii. By clicking on the button, the user will be taken to a screen that is similar to the Smart Planner Report page. This page shows what courses are required for the What-If plan and where the courses that the student has completed apply to the new plan.

iv. In the top right corner there is a button that will take you to a page that is similar to the Smart Planner Main page. The purpose of this page is to provide students with a suggested path to complete the plan. This page does not have as much functionality as the Smart Planner main page, but provides explanation as to why courses were suggested in certain semesters.

**What-If Study Plan**

<table>
<thead>
<tr>
<th>Requirement</th>
<th>Units</th>
<th>Course</th>
<th>Why?</th>
</tr>
</thead>
<tbody>
<tr>
<td>MATH 207 Business Statistics</td>
<td>3</td>
<td>Untagged</td>
<td></td>
</tr>
<tr>
<td>ANTH 220 Communicating Knowledge in Agriculture and the Life Sciences</td>
<td>8</td>
<td>Untagged</td>
<td></td>
</tr>
</tbody>
</table>

**Fall 2013**

<table>
<thead>
<tr>
<th>Requirement</th>
<th>Units</th>
<th>Course</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>NUTR 121 College Operative Concepts and Applications</td>
<td>3 multiple options</td>
<td>N/A</td>
<td></td>
</tr>
<tr>
<td>ANTH 230 Principles and Practices of Ancient Archaeology</td>
<td>3</td>
<td>ANTH 100</td>
<td>n/a</td>
</tr>
<tr>
<td>HEB 101 Introduction to Biology 1</td>
<td>3</td>
<td>Multiple options</td>
<td>n/a</td>
</tr>
<tr>
<td>AGR 101 Introductory Biology 2</td>
<td>3</td>
<td>Untagged</td>
<td></td>
</tr>
<tr>
<td>AGR 201 Applications of Agricultural Practice</td>
<td>3</td>
<td>AGR 201</td>
<td></td>
</tr>
<tr>
<td>AGR 301 Youth Leadership Development</td>
<td>3</td>
<td>AGR 301</td>
<td></td>
</tr>
</tbody>
</table>
h. **Overview Page**: This page allows the advisor and student to see a visual overview of the students’ progress.

i. The Overall Units are pulled directly from the sequence unit amounts provided by the departments, and the cumulative gpa is pulled from the same source that displays on the advip.

ii. The graphs display information from the major requirements. There are three categories of courses in this area: Completed (courses that have been completed by students), In Progress (courses the students are enrolled in and don’t yet have a grade for), and Needed (courses that students still have left to complete in order to fulfill their requirements).

iii. There is an area for major notes. Departments can include notes that pertain to the major or minor. These notes can be anything the department deems necessary for a student to know.

iv. The Units for Major area contain the numbers used in the graphs above this area, and the units are from the sequences provided by the department.

v. Below the units section the Advisor contact information will be displayed. This information is pulled from Advisor Assignments.
i. **Advisor View:** This page will only be used for testing and to check for errors. If errors are found or the DT team needs an understanding of how Degree Tracker is planning the sequence, this screen contains more of the logic and references for the Business Analysts to assist in building and correcting the plans.

### Explanation of Advisor View Table:

- **Applicable button(s) at the top:**
  - Refresh DTSR Exceptions: When exceptions are made to the advip, the Smart Planner can be refreshed, with the exceptions applied, by clicking on this button. Note: the advip and Smart Planner are refreshed every night, so this button is only necessary if you/the student want to see immediate results.
- The information for the Semester, Description, Notes, Status, Checkpoint, and Units columns are similar to the information provided on previous screens.
- The Priority column is the preferred sequence for each semester as the department has specified.
- The Requirement and Line columns list information on how to internal determine errors. This information is used by the Business Analysts on the Degree Tracker team. If you find errors in this report, please note the Requirement and Line number on your testing checklist.
• The Source column is used to determine how the requirement is satisfied. If the line says “DTSR” then it is from a requirement that the Degree Tracker team has built. If it says “REF”, then it is referring to the advisement report to satisfy the requirement.

• The Courses column has information when there are multiple course options (Tier 1, Tier 2, Major Electives, etc.). When clicking the link in the corresponding description line, a pop up window will appear containing more information:

![Course Information](image)

• The Details column will provide further information for Tier 1, Tier 2, and English status. This window will show which courses are completed and how many are needed to be complete the requirement. When choosing the “Details” hyperlink, a pop up window should appear:

![Course Details](image)

• The Term column is populated for future terms in order to review which future semesters will need scheduling. The data will be in the coded in the format of 2121 for Spring 2012, 2124 for Fall 2012, etc.

• The final column, Message, shows the following:
  1) The course and term as requirements are satisfied.
  2) The semester a course is suggested.
  3) Reasons why a course is skipped in the sequence for a particular semester.
     a. Not typically offered this term
     b. Max units will be exceeded
     c. Pre-requisite needed
     d. Co-requisite needed