



EAB

Summer of Navigate Student Configuration Intensive

Session 2: Academic Planning

Today's Presenters



Fiona Cavise
Partner Support Team



Olivia Aborn
Partner Support Team

Thank you for Joining the Summer of Navigate Student!



Workshop series on the Mobile App, Academic Planning and Survey

Part I **Student App &** **Content**



Workshop: June 1st, 2-3:30pm ET

Q&A Follow Up: June 15th, 2-3pm ET

Part II **Academic** **Planning**



Workshop: June 29th, 2-3:30pm ET

Q&A Follow Up: July 13th, 2-3pm ET

Part III **Survey** **Builder**



Workshop: July 27th, 2-3:30pm ET

Q&A Follow Up: August 10th, 2-3pm ET

- 1 Academic Planning Overview
- 2 Program Template Build
- 3 Using Academic Planning



Academic Planning

Overview



1

Navigate's Academic Planning Tools

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WHITEHURST UNIVERSITY TEST

NAVIGATE Explore Planner Logout

My Planner
Art BS null

Degree Audit Feedback History Quick Planner Print

Plan Suggestions

The following list of courses are the requirements you will need to take in order to graduate. We recommend taking the courses in order from top to bottom. Please remember that this academic plan is a recommendation of sequence of courses and does not replace your formal degree audit for graduation requirements. A minimum of 120 credits are needed to graduate in this program.
Drag or add courses through the course menu to plan them on your terms.

Program Template Courses

- Gen Ed Math **Planned**
- BIOL2106 INTRO TO THE BIOL SCIENCES
Gen Ed Science **Planned**
- Gen Ed English
Choose one of the following courses:
 - 401. ENGL 2305 WORLD LITERATURE II **View Details >**

Fall 2021

Term begins August 21

Planned

- BIOL2106 INTRO TO THE BIOL SCIENCES
Gen Ed Science
- Gen Ed Math placeholder **Placeholder**
- 2000 Fundamentals of Sculpture **View Details >**
- 4000 LAB EXP IN PSYCH **View Details >**
- 209. ACCOUNTING FOR THE NON-ACCOUNT **View Details >**

View / Edit Schedule **See 100 Credits**

Collaborative
Term & Course
Planning

WOODLEY-NEW

NAVIGATE Explore Planner Logout

Back to My Planner
Fall 2021 12 Credits scheduled

+ Enter Section PINs Pay Tuition Register (2)

MATH305 Statistics I

Section Times

Available (0) **Conflicting (1)** Full (0)

These times conflict with your preferences. Drag the desired time to the calendar.

Downtown (1)

- MATH305 - CRN 123642 4 Seats
Aug 19th - Dec 19th 2021, 17 Weeks
Multiple Meetings
Tue Thu 4:30 pm - 6:00 pm
Curtis Howell
Downtown | Highrise 118

	Sun	Mon	Tue	Wed	Thu	Fri	Sat
6 am							
7 am							
8 am		PSY200		PSY200		PSY200	
9 am							
10 am							
11 am							
12 pm							
1 pm							
2 pm		PSY101		PSY101		PSY101	
3 pm							
4 pm		PSY300		PSY300		PSY300	
5 pm			PSY201		PSY201		
6 pm							

Best-Fit
Scheduling &
One-Click
Registration

Accessing Academic Planning

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For Students and Content Administrators: <https://yourschool.navigate.eab.com>

WHITEHURST UNIVERSITY TEST

NAVIGATE Explore Planner Logout

Home
To-Dos and Events
Appointments
Reports
Study Buddies
Resources
Messages
Holds
Class Schedule
My Major

Welcome back David,
Heads up! You have a hold needing attention.

Mon, Jun 28 Refresh + Add Reminder

You have 13 important to-dos for today
Check them out View Details

For All Other Staff: <https://yourschool.campus.eab.com>

WHITEHURST UNIVERSITY

NAVIGATE Quick Search Groups Whitehurst Unive... Terms Summer Semest... ? 54

David Johnson

Overview Success Progress History Course Info Major Explorer Path **Academic Plan** More

Course Grade D/F	Repeated Courses	Withdrawn Courses	Mixed Success Markers	Cumulative GPA
1	2	0	0	2.98

Total Credits Earned	Credits Completion % at this Institution	Support Level
0.00	100%	View detail

EAB

Current Alerts 3

I want to...

- Message Student
- Add a Note on this Student
- Add a Reminder to this Student
- Report on Appointment
- Create Request for Appointment

Demo

Student Planning

Term Planning - Two Methods



Plan Build Starting Place:



Don't Use Templates

Users search course catalog to build academic plans

Use Templates

Users reference a program template to build academic plans

Decision: What is your template build approach?

- All Templates
- Some Templates
- No Templates



Building Program Templates

-
1. Prepare
 2. Build


2

Step 1: Finalize Course Sequence Maps



Prepare

Woodley University

B.S. Biology (for students starting Fall 2021 or later)

Semester 1

- Foundations in Biology
- Intro to Chemistry
- First Year Seminar
- Gen Ed English

Semester 2

- Animal Biology OR Ecology
- Principles of Chemistry II
- Mathematical Statistics
- Gen Ed Psychology

Semester 3

- 200 Level Biology Course
- Intro to Journal Reading
- Organic Chemistry I
- Gen Ed History

Semester 4

- Take 1 Biology Elective
- Organic Chemistry II
- Biology Lab Internship
- Open Elective



Why?

Allows for efficient “plug and play” template build in CAT

Step 2: Assign Program Build Owners



Prepare

Program Code	Assignee	Status	Notes
ACCT-BA	Dr. Prospect	Published	
ANTH-BA	Mr. Williamsburg	Drafted	
BIO-BS	Ms. E	Not Started	
BUS-BA	Dr. Prospect	Published	
CHEM-BS	Ms. E	Drafted	Needs Chemistry department review



Why?

Creates clear delegation of work and owners for action items

Step 3: Create Common Build Rules

Prepare

Template Component	Build Guidelines
Program Level Instructions	<i>None, use default language</i>
General Elective Search Group	<i>Please use the search to find an elective course</i>
Major Elective Search Group	<i>Please use the search to find a [MAJOR] course that meets your elective requirement</i>
Upper-level Elective Search Group	<i>Please use the search to find a course at the 300 or 400 level to satisfy your elective requirement</i>
Non-Course Requirements	<i>Department level decision</i>



Why?

Creates uniform template instructions for students

Proactively answers CAT template builder questions

Step 4: Schedule Build Sprints



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Prepare

1

Schedule sprint sessions

- ❖ Each session should be 2-3 hours
- ❖ All Template builders work in CAT on respective programs. Work through questions together

2

Complete in 2-4 weeks

- ❖ Template to be completed 2 weeks prior to Go-Live or start of term

3

Integrate into existing process

- ❖ Update Templates in CAT as part of regular curriculum changes



Why?

Efficiently build/update templates. Then move on to other projects.

Partner Highlight: Build Sprint

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Build Process:

- Gathered academic program maps ahead of build
- Pre-built general education course group templates
- Two building sessions held over one week
- Template drafts reviewed by Registrar

Stats:



100 program templates



1 catalog year



13 team members



Completed in 1 week

Strategy Highlights

Established clear ownership

Programs assigned to template builders ahead of session for efficient working time

Pre-work set builders up for success

Course group templates were ready, programs maps assembled, and work blocks scheduled

Expert supported build process

University Registrar joined sessions to answer questions live

Sprint mentality ensured efficiency

Initial build work concentrated to a 1-week intensive period

Step 5: Build Course Group Templates

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Prepare

Academic Planning

Academic Templates

Recommended sequences of courses, by program and catalog year.

Course Group Template

Course group templates are common groups of courses to be used by multiple programs.

Course Group Templates

Search

Search

Search

Clear filters

Course Group Template ▾

Courses

[2nd Gen Ed Art](#)

19

[2nd Gen Ed English](#)

11

[2nd Gen Ed Math](#)

6

[2nd Gen Ed Science](#)

13



Why?

Build once, mitigate duplicative work.

Demo

Building Course Group Templates

Template Build Readiness Check-List



Use for initial build or annual maintenance



- 1 Finalize course sequence maps
- 2 Assign program build owners
- 3 Create common rules
- 4 Schedule build sprints
- 5 Build Course Group Templates

Woodley University

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Semester 4

8. Take 1 Biology Elective
 - Organic Chemistry II
9. Biology Lab Internship
10. Open Elective

Demo

Building a Program Template

Template Build Recommendations



Template Build Toolbox

Add a single course

Add a course group

Add a course group from a template

Add a search group

Add a non-course requirement

Import courses from another plan

+ Add Course Group



Templates should be pathways
Not re-create degree requirements



Max 10-15 courses per course group.
Use a search group if more courses needed



Use descriptive language within search
groups to guide students



Build templates as 'Ongoing'
No catalog updates = No CAT updates!

Demo

Reviewing Templates in Student Site (Using Student Preview)

ACADEMIC PLAN PERMISSIONS

- ☐ Academic Plan Viewer. View academic plan templates.
- ☐ Academic Plan Editor. View and edit academic plan templates.
- ☐ Academic Plan Publisher. View and publish academic plan templates.
- ☐ Academic Plan Moderator. Edit academic plan permissions for self and others.

STUDENT PREVIEW PERMISSIONS

- ☐ Student Previewer. Preview the Navigate experience as a specific student using a copy of their data. Preview does not affect a student's real data or records.



Using Academic Planning

-
- Process Map
 - Communicate & Train
 - Launch



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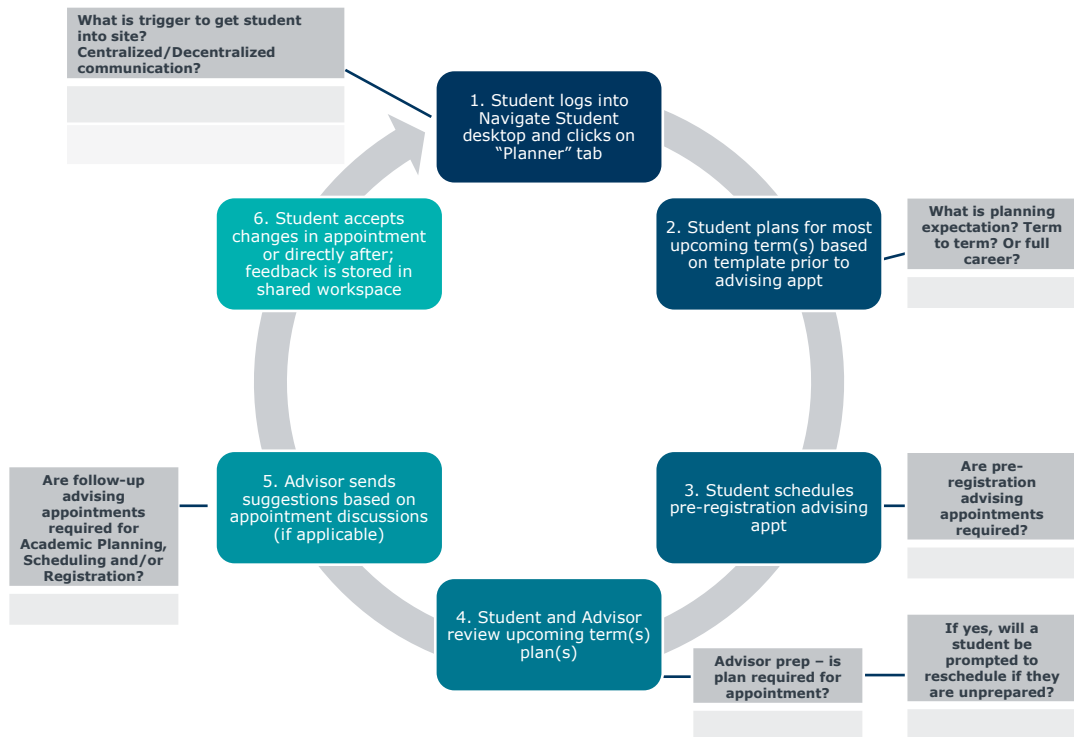
Using Academic Planning

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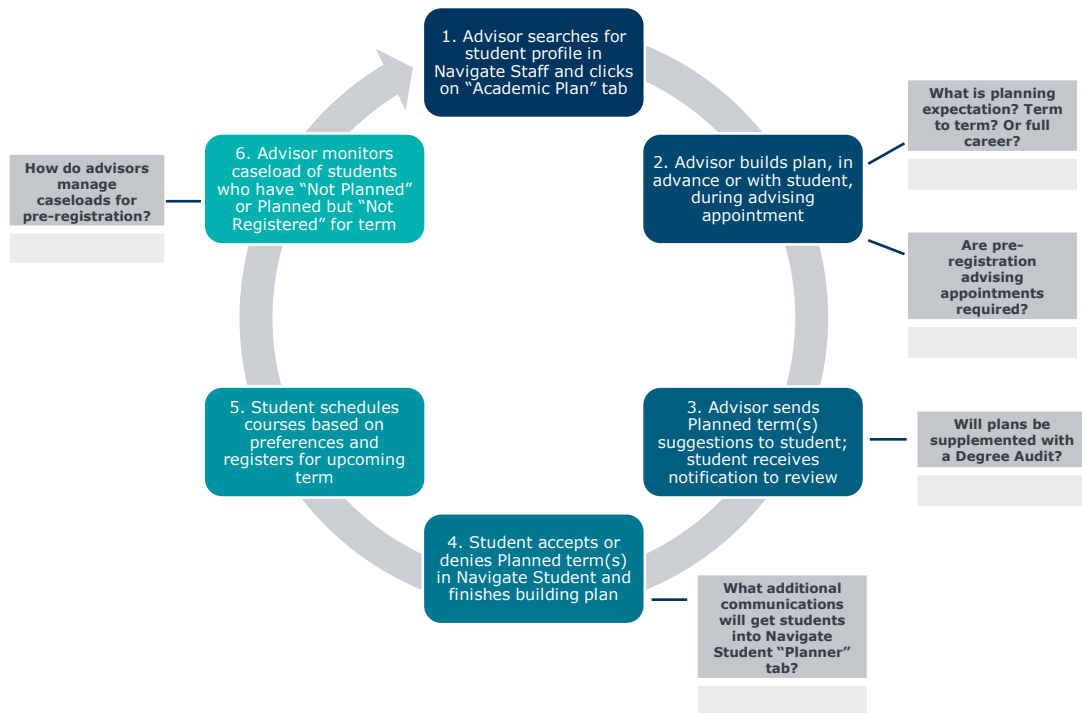
Use EAB Sample, Fill In Institutional Details

1. Process & Expectations Map (Student Initiated Planning)



Use EAB Sample, Fill In Institutional Details

1. Process & Expectations Map (Staff Initiated Planning)



Academic Planner and Degree Audit

The need for both tools and how they come together



Academic Planner

- Not intended to replace your institution's degree audit system
- Provides self-service tools for students improving the planning, scheduling and registration process
- Shared workspace enables advisors to make suggestions directly on the student's plan
- Keeps a digital record of student's plan and advisor recommendations
- Brings the planning and registration process into Navigate where other features can be used in conjunction with planner

Consider this: A new student is writing their first college paper. An outline will help them visualize and structure their writing (an academic plan is the outline of their path to degree)



Degree Audit

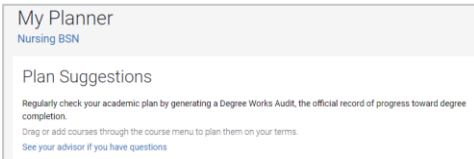
- Your institution's source of truth on a student's progress towards meeting their degree requirements
- Typically not sequenced for easy planning
- Some degree audits include a "planner" feature with a sequenced list of courses for a student. In this case, it is recommended to move student-level planning to Navigate

Consider this: A new student is writing their first college paper. A grading rubric will help them understand the required components of their assignment for a successful grade (a degree audit is the grading rubric for their path to degree)

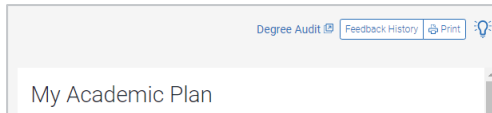
Linking Navigate to Degree Audit

Leveraging connections to degree audit in Navigate

1. Refer to degree audit and other helpful information for students in the instructions at the top of the Planner



2. Include a link to the student degree audit login page directly on the Planner



Student Communication & Training - Poll



Self-Service Tool: Equipping Students Saves Staff Time

How do you communicate Navigate's Academic Planning Tools with Students?



Incorporate into First Year Courses



Promote digital training resources



Require Pre-Planning for Advisor Appointments



Run campaigns w. Academic Planning Instructions



Communicate w. students who haven't planned yet

Staff Recommendations and Resources

Communication & Training



Leverage existing technology trainings and processes



Outline clear expectations for usage



Use detailed EAB training guides

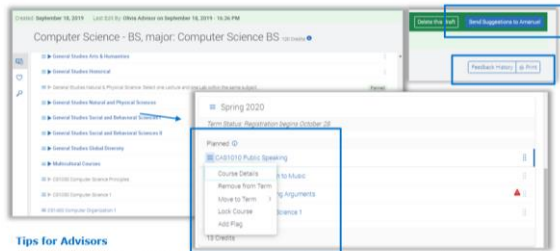


Getting Started: Advisor Guide to Academic Planning

An integrated component of Navigate, Academic Planning helps students plan and schedule their courses, supporting timely degree completion.

The below instructions detail how to use the Academic Plan tab on a student's profile to review and make suggestions on a student's academic plan.

1. Log in to Navigate with your SSO credentials: [https://\[YOURSCHOOL\].campus.eab.com](https://[YOURSCHOOL].campus.eab.com)
2. Go to the Student Profile and click on the "Academic Plan" tab
3. Click the "Add Comments or Suggestions" button in the upper right-hand corner
4. Use the "+" Add Term" button to add terms to the student's academic plan and use the degree template on the left-hand side to plan courses by terms
5. You can move courses, add a flag to leave a comment on a course, and lock courses using the hamburger menu to the left of the course name
6. When you have made all desired changes, use the "Send Suggestions" button in the upper right to send your feedback to the student.
7. **Reminder:** Students need to accept or decline your suggestions. Remind your students about this important step and encourage them to allow notifications from Navigate Students so they do not miss your feedback



Tips for Advisors

- Use the "Search" tab on the left side of the screen to find and add a course that is not listed on a student's degree template.
- Click the "Feedback History" link in the upper left to see a record of recommendations made to this student and whether a student accepted or declined those recommendations.
- If a student does not need to complete a course on their degree template, use the hamburger menu to the left of the course name on the template to select "Mark as met" and leave a comment.

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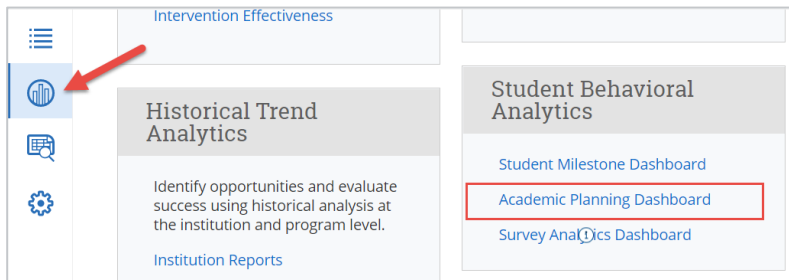
Utilization Example 1

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Launch – How many Students have used Navigate's Academic Planner?

Step 1:

Open the Academic Planning Dashboard within Navigate's Analytics Tools



Intervention Effectiveness

Historical Trend Analytics

Identify opportunities and evaluate success using historical analysis at the institution and program level.

Institution Reports

Student Behavioral Analytics

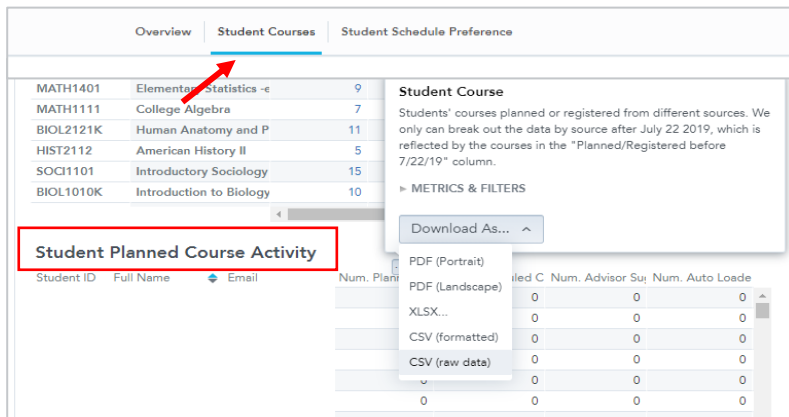
Student Milestone Dashboard

Academic Planning Dashboard

Survey Analytics Dashboard

Step 2:

On the 'Student Courses' tab, export the 'Student Planned Course Activity' table to a CSV file.



Overview **Student Courses** Student Schedule Preference

Course ID	Course Name	Count
MATH1401	Elementary Statistics -e	9
MATH1111	College Algebra	7
BIOL2121K	Human Anatomy and P	11
HIST2112	American History II	5
SOC11101	Introductory Sociology	15
BIOL1010K	Introduction to Biology	10

Student Planned Course Activity

Student ID Full Name Email Num. Plan

Student Course

Students' courses planned or registered from different sources. We only can break out the data by source after July 22 2019, which is reflected by the courses in the "Planned/Registered before 7/22/19" column.

METRICS & FILTERS

Download As...

- PDF (Portrait)
- PDF (Landscape)
- XLSX...
- CSV (formatted)
- CSV (raw data)**

Utilization Example 1 Continued

Launch – How many Students have used Navigate's Academic Planner?



Understanding the Export:

Columns D, E, F, and G represent students who have used Navigate's Academic Planner tools some capacity

D	E	F	G	H
Num. Planned Courses	Num. Scheduled Courses	Num. Advisor Suggested Course	Num. Auto Loader Courses	Num. Registered Courses

Step 3:

In a new column, calculate the sum of columns D, E, F, and G per row.

D	E	F	G	H
Students who used Navigate's Academic Planning Tools	Num. Planned Courses	Num. Scheduled Courses	Num. Advisor Suggested Course	Num. Auto Loader Courses
=sum(E2:H2)			3	
			2	
	1		1	4

Step 4:

Remove all rows where the Sum = 0.

Count the remaining rows. These are the total number of students that have used Navigate's Academic Planning tools.

Number Filters

Search

☒ (Select All)

☐ 0

☒ 1

☒ 2

☒ 3

Demo

Utilization Example 2: Saved Search - My Students Not Yet Planned



Reminders & Next Steps



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Register for Academic Planning Q&A

We will be reviewing...

- Course Scheduling
- One-Click Registration
- Breakout Discussions

Questions?

*Submit a ticket to our Partner Support Team
NavigateTechSupport@eab.com!*



Washington DC | Richmond | Birmingham | Minneapolis | New York | Chicago

202-747-1000 | eab.com