

## EAB Academic Planner Advisor Practice Tasks

Access the Navigate training site at <https://houston.campus-training.eab.com/>

To support timely degree completion, Navigate Student now includes a desktop degree planning tool called Academic Planning that allows students to collaborate with their advisors to plan their courses term-by-term, and to later schedule and register for their courses.

The Degree Planning Template lists courses in the order in which students should enroll to complete their degree. Advisors or students can initiate the planning process, adding courses term-by-term from the template on the left onto the academic plan on the right. The Degree Planning Template is intended as a collaborative planning tool, and is not considered an official degree audit.

**Complete the following Practice Tasks in the Navigate training site.** Working in the Navigate training site allows you to practice with real student data but without making any real changes - you can't break anything! Do note that the training site data is not updated as regularly as the live production site, so it is possible that there may not be an exact match to Navigate or PeopleSoft.

1. In **Advanced Search**, find a student in either Exploratory Studies or Pre-Business; choose a student with a GPA to make sure this student has enrolled, so the template will display.
2. From the student's profile page, access the **Academic Planner** using the gray tab at the top. If you happen to select a student that another advisor has already used to practice, you will see a "Pending student response" note at the top. In this case, click on **Revoke** and **Make Additional Changes** to continue your practice.
3. Review the **My Academic Plan** on the right side, and compare the student's completed and planned courses to the DPR in PS.
4. Review the student's **Plan Suggestions** on the left side. Although this is a fictitious plan, the courses showing as Completed or Enrolled should be accurate.
5. Click **Add Comments or Suggestions** at the top right to begin.
6. Click **+ Add a new term** at the top right to add a new future term.
7. Drag a few courses from the left onto a future term on the right. Selecting a Course Group will create a Placeholder; click the triangle to plan the exact course, or leave for the student to select.
8. **Flag** a course and add a comment. **Lock** a course. (Note – if you have a Course Group as a Placeholder, you'll only get the Flag and Lock options once an individual course is selected.)
9. **Use Move Term to** move a course to a different term on the plan.
10. **Use Course Details to** view course details from the UH Catalog.
11. Drag a course off the plan on the right and back to the template on the left.
12. **Send Suggestions** to the student. (Note that in the training site, the comments will not actually send to the student.)

**Do you feel ready to work with a real student? Great! If not, go back to #1 and practice again.**

Need help? Email [navigate@uh.edu](mailto:navigate@uh.edu)