



Banner System - Academic Advisor Plan Ahead Feature

Faculty User Manual

The “Plan Ahead” option in Banner system is a new feature which enables the students to plan the courses for the next term and to receive feedback and approval from you on the course plan which they have proposed, prior to the registration period.

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What's new in V1.1?

[Section 5](#) was added.

1. Advise the Students While they Create their Plans

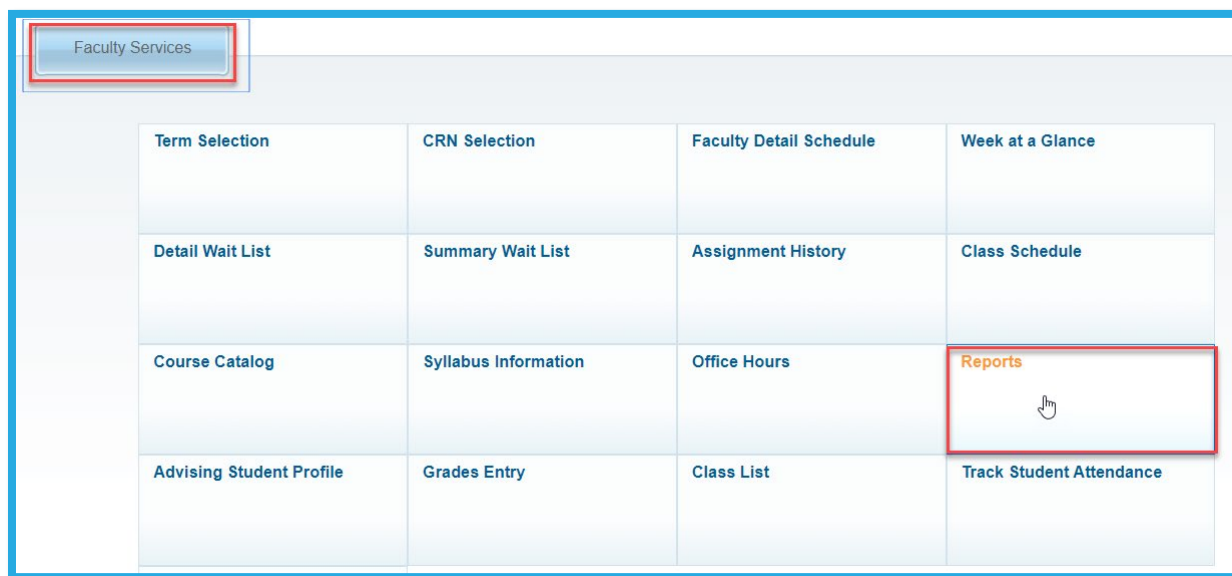
Policy

Courses under the below conditions will be listed in the Plan Ahead feature:

- 1- Courses in the student's study plan.
- 2- Courses that are not completed.
- 3- Courses that are offered in the next term.

While the student is creating the plan, if there are any courses that they would like to plan for but is not available in the list, they should reach out for your advice to check the following:

- 1- Whether the course will be available in the next term
- 2- Whether it is part of the study plan
- 3- If both of the above are confirmed, and the student still cannot see a course which they should be taking in the next term, on the home page of Banner, click on Faculty Services → Reports → Faculty → Remaining Courses, as illustrated below, to identify the issue.

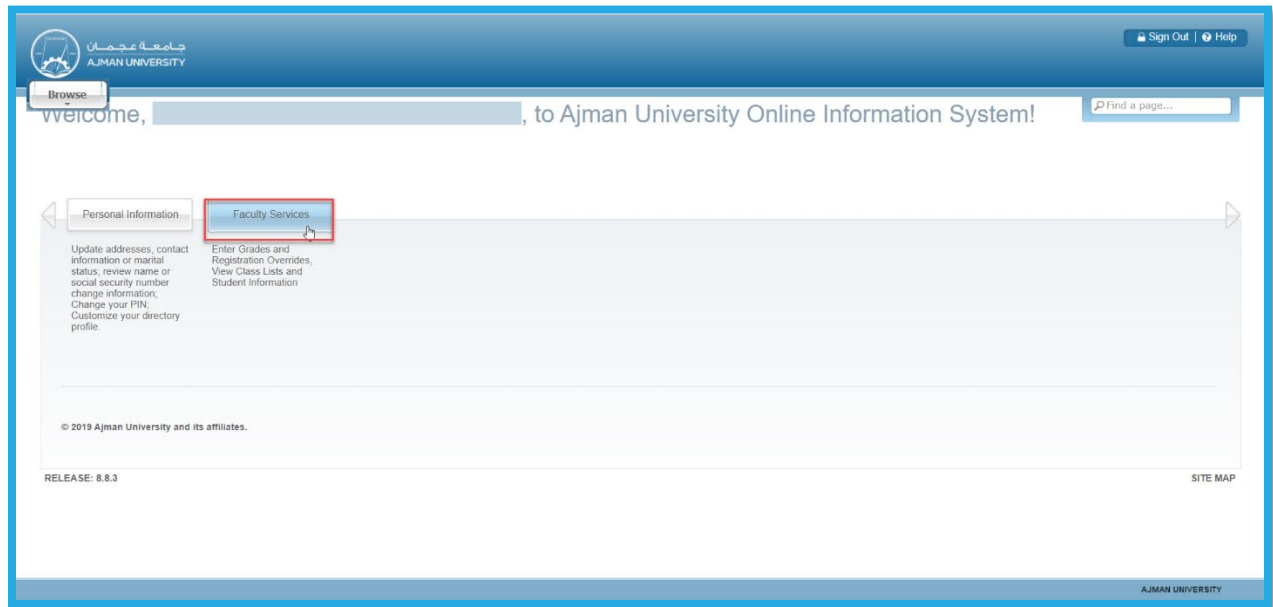


2. Access the Plan Ahead

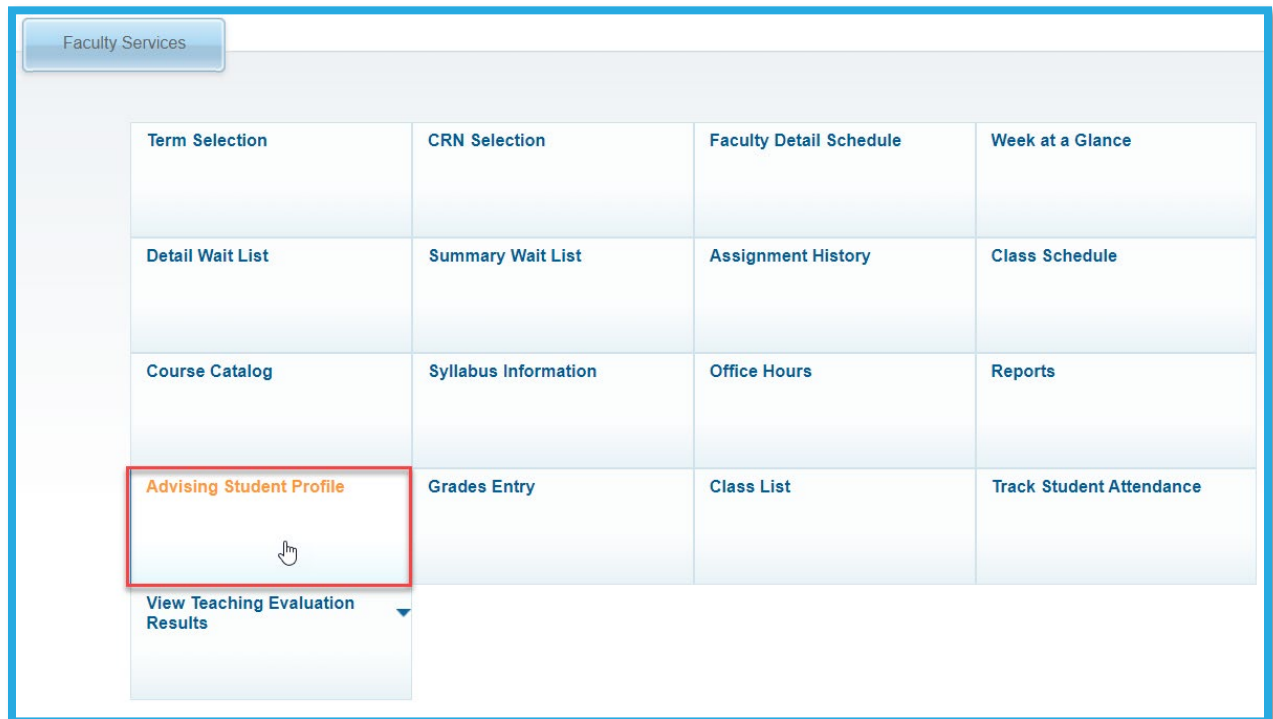
You will receive an email once a student submits a plan for your review. Therefore, in order to access the Plan Ahead feature on Banner, please follow the below steps:

- 1- Log in to [Banner](#)

2- On the home page of Banner, Click on Faculty Services, as illustrated below:



3- Click on Advising Student Profile, as illustrated below:



4- Search for the student you would like to advise, following the below steps:

The screenshot shows a web interface for searching students. At the top, a grey header bar contains the text "Change term, search for a student, or view your advisee listing". Below this, the "Term" is set to "Second Academic Semester 2019" (Step 1). Under the heading "View advisee listing, or search by", three radio buttons are shown: "Student ID" (selected, Step 2), "Student Email", and "Student Name". Below these is a text input field labeled "Student ID". At the bottom, there is a "View Profile" button (Step 3) and a blue link "View My Advisee Listing" (Step 4).

Change term, search for a student, or view your advisee listing

Term
Second Academic Semester 2019

View advisee listing, or search by

☒ Student ID
☐ Student Email
☐ Student Name

Student ID

[View My Advisee Listing](#)

1 Choose the Term

2 Choose the search method. You can search by Student ID, Email or Name

3 Click on View Profile


4 You can even view your advisee list, instead of following the previous two steps

- 5- On the student profile, click on Registration and Planning, which is located on the left side of the screen, as illustrated below. Once you click the button, a new page will open.

Student Profile - ()

Term: Second Academic Semester 2019 ▼

Standing: No Standing, as of First Academic Semester 2019



Curriculum and Courses

Prior Education and Testing

Additional Links

Degree Evaluation

Registration History

Registration Fee Assessment

Student Schedule

Week at a Glance

Registration and Planning

Date of Birth:

Ethnicity:

Race:

Citizen:

Citizenship:

Emergency Contact:

Emergency Phone:

General Information ⓘ

Level:

Class:

Status:

Student Type:

Residency:

Campus:

First Term Attended:

Matriculated Term:

Last Term Attended:

Leave of Absence:

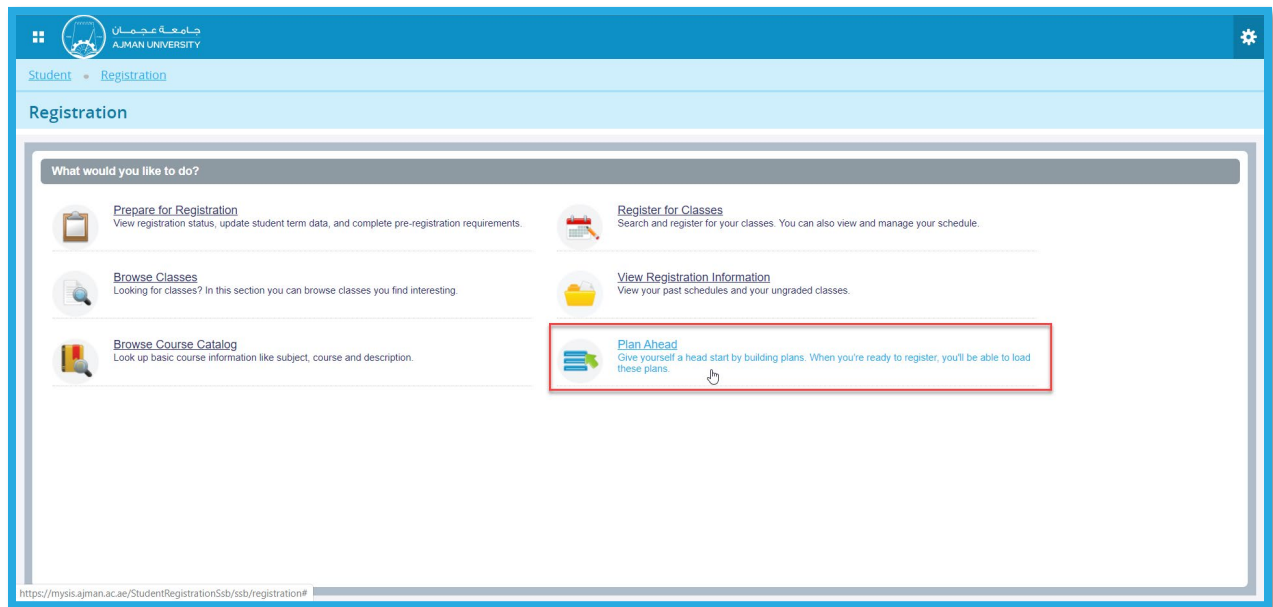
Graduation Information

Graduation Applications:

Advisors

Primary / Academic Advisor

6- On the new page, click on Plan Ahead option, as illustrated below:



3. View the Plan and Act on it

Note: The plans should be created and approved in each semester.

In order to view the plan for the next term, which was created by the student, please follow the below steps:

1- Select the term and search for the student, as illustrated below:

Terms Open for Planning

Second Academic Semester 2019

Search

☒ ID ☐ Name

Search by Student ID or Name

Continue

- 2- You can view the courses and notes in the student's suggested plan, as illustrated below:

The screenshot shows the 'Select A Plan' interface. At the top, there are navigation links: Student, Registration, Select a Term, and Select A Plan. Below this, the title 'Select A Plan' is displayed. The main content area shows 'Plans you have created for this term: 0' for the 'Term: Second Academic Semester 2019'. It states 'You are allowed a maximum of 2 plans for this term.' and includes a 'Create a New Plan' button. Below this, there is a table with columns: Title, Details, Hours, CRN, Schedule Type, Instructor, Grade Mode, and Note. The table contains three rows of data:

Title	Details	Hours	CRN	Schedule Type	Instructor	Grade Mode	Note
Computer Programming	BME 103	0					
Introduction to Art	ART 111	3					
Introduction to Biomedical Eng.	BME 101	0					

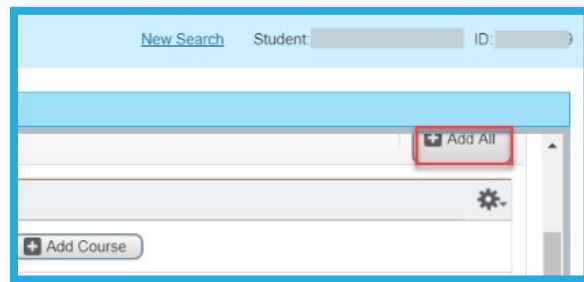
At the bottom of the table, it says 'Total Planned Hours: 3' and 'Records: 3'.

Important Note: Please create a new plan, replicate the students plan, update it, add notes if needed, and then approve it. Please DO NOT approve the student's plan directly, even there is no update needed, to become the owner of the plan and to avoid any update by the student after your approval.

- 3- Click on Create a New Plan button as illustrated below:

The screenshot shows the 'Select A Plan' interface. The title 'Select A Plan' is at the top. Below it, the main content area shows 'Plans you have created for this term: 0' for the 'Term: Second Academic Semester 2019'. It states 'You are allowed a maximum of 2 plans for this term.' and includes a 'Create a New Plan' button. The button is highlighted with a red rectangle and a hand cursor icon pointing to it.

- 4- In the Created by Others section, click on Add All, in order to replicate the plan and adjust it, as illustrated below:



- 5- If you would like to add other courses, which are not added to the plan yet, click on the Projections section, as illustrated below:



- 6- In the Projections section, you will be able to view all the courses which the student should be taking in the next terms until your graduation. In each row, you will be able to view the Course Title, Details, Type (Mandatory or not) and there is an Add button for each course, as illustrated below.

Find Classes	Created by Others	Projections	
First Aid	AID 111		<button>Add Course</button>
Introduction to Art	ART 111		<button>Add Course</button>
Astronomy	AST 211		<button>Add Course</button>
Intro. to Biomedical Eng.	BME 101	Mandatory	<button>Add Course</button>
Computer Programming	BME 103	Mandatory	<button>Add Course</button>
Biochemistry	BME 202	Mandatory	<button>Add Course</button>

- 7- Once you add all courses, you will be able to view and edit them, as illustrated below:

The screenshot shows a web application interface for managing an academic plan. At the top, the title bar reads "Second Academic Semester 2019Untitled Plan" with a plus icon and a circled "1". Below this is a table with columns: Title, Details, Hours, CRN, Schedule T, Note, Status, and Action. The table contains three rows of courses, each with a plus icon in the Note column and a circled "2". The Status column for all rows shows "Pending". The Action column has an "Add" button for each row, with a circled "3" next to the first one. Below the table, a summary bar shows "Total Planned Hours: 0".

Below the table, three numbered callouts illustrate editing options:

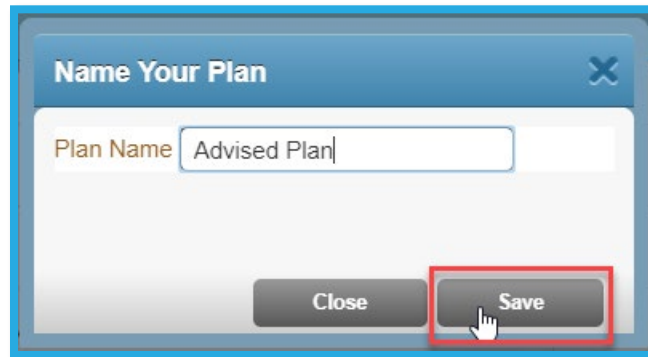
- 1** Add notes about the whole plan: A dialog box titled "Note for Second Academic Semester..." with a text area and "Cancel" and "Save" buttons.
- 2** Add notes about each course: A dialog box titled "Note for BME 103, Computer Progra..." with a text area and "Cancel" and "Save" buttons.
- 3** Remove the course, if needed: A dropdown menu in the Action column showing "Add", "Remove", and "Add" options.

- 8- Click on Save Plan, once you are done with editing this plan, as illustrated below:

The screenshot shows the same web application interface as before, but with a different set of courses in the table. The table has five rows. The first three rows have "Remove" buttons in the Action column, and the last two rows have "Add" buttons. The Status column for all rows shows "Pending". The summary bar still shows "Total Planned Hours: 0".

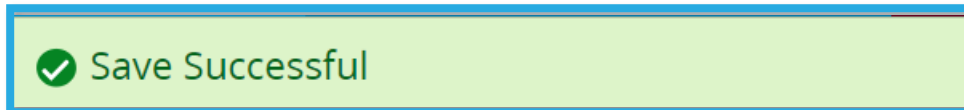
At the bottom right of the interface, a "Save Plan" button is highlighted with a red rectangular box. A mouse cursor is pointing at the button.

- 9- Enter a Plan Name and click Save, as illustrated below, in order to send the plan to your student.

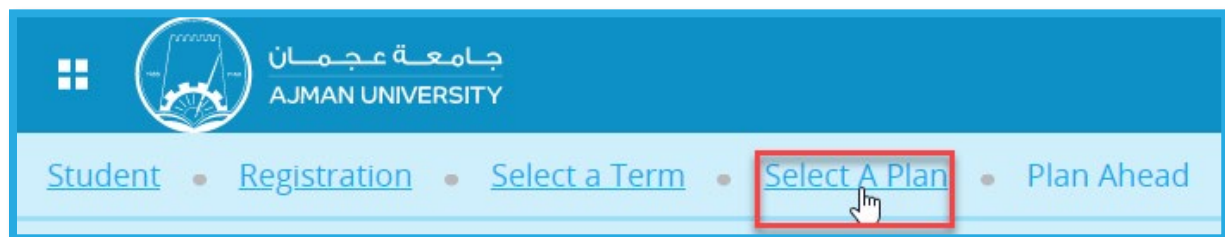


The screenshot shows a dialog box titled "Name Your Plan" with a close button (X) in the top right corner. Inside the dialog, there is a text input field labeled "Plan Name" containing the text "Advised Plan". Below the input field, there are two buttons: "Close" and "Save". The "Save" button is highlighted with a red rectangular box, and a hand cursor is pointing at it.

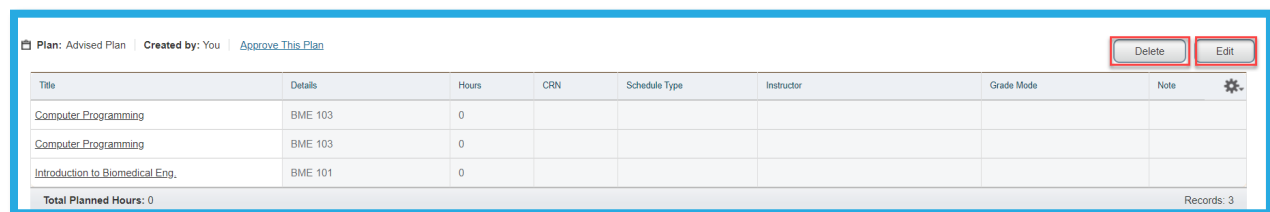
Once the plan is saved, you will receive the below message on the top right of the screen:



- 10- To go back and view all plans for a specific term and to act on any plan, click on the Select A Plan, as illustrated below:



- 11- If you would like to edit or delete any plan which you have already created, please click on the corresponding buttons, as illustrated below:



The screenshot shows a table titled "Plan: Advised Plan" with a sub-header "Created by: You | Approve This Plan". The table has columns: Title, Details, Hours, CRN, Schedule Type, Instructor, Grade Mode, Note, and a gear icon. There are three rows of data. At the bottom, it says "Total Planned Hours: 0" and "Records: 3". In the top right corner, there are two buttons: "Delete" and "Edit", both highlighted with red rectangular boxes.

Title	Details	Hours	CRN	Schedule Type	Instructor	Grade Mode	Note	
Computer Programming	BME 103	0						
Computer Programming	BME 103	0						
Introduction to Biomedical Eng.	BME 101	0						

Tip: You can add up to two plans per student, but you can only approve one of them.

4. Approve the Plan

You can view the plans from the same location where you accessed the Plan Ahead (mentioned in the first section of this document), or through the last step in the previous section.

In the below illustration, it appears that there were two plans created, the first by the student and the second by you. Click on the Approve this Plan button for the plan you created and would like to advise the student to follow.

Plan: 20192 Plan | Created by: (Student) | Preferred | [Approve This Plan](#)

Title	Details	Hours	CRN
Computer Programming	BME 103	0	
Introduction to Art	ART 111	3	
Introduction to Biomedical Eng.	BME 101	0	
Total Planned Hours: 3			

Plan: Advised Plan | Created by: You | [Approve This Plan](#)

Title	Details	Hours	CRN
Computer Programming	BME 103	0	
Computer Programming	BME 103	0	
Introduction to Biomedical Eng.	BME 101	0	
Total Planned Hours: 0			

5. Release the Advising Hold

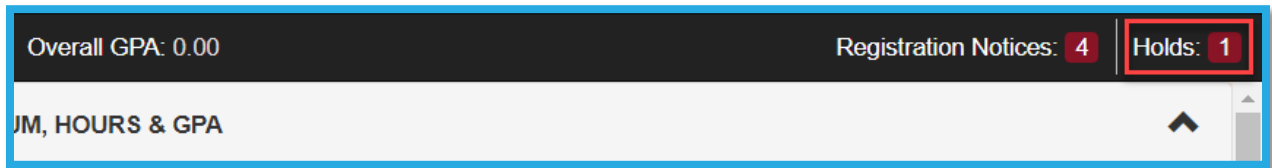
Once you approve the plan for your advisee, the advisee will still have an advising hold which you need to release. To do that, please follow the below steps:

1- Go to the **Advising Student Profile** in Banner. You can do that by following the first 4 steps of [section 2](#) in this manual.

Note: In the Advising Student Profile, you should:

- Choose the semester for which you have approved the plan ahead.
- Enter the student ID for the advisee which you have already approved his/her plan only.

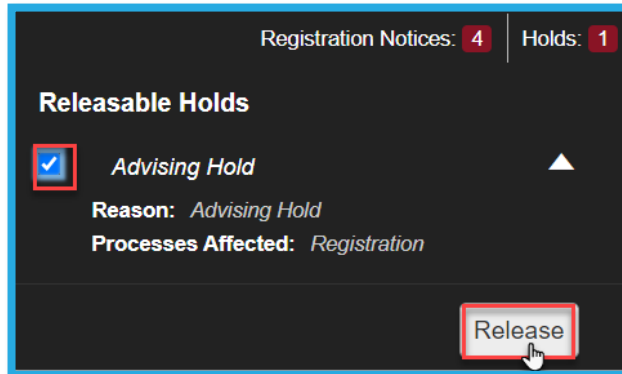
2- On the right side of the screen, you will be able to see the number of holds for this student, as illustrated below. Click on **Holds**.



Overall GPA: 0.00 Registration Notices: 4 Holds: 1

IM, HOURS & GPA

3- Choose the **Advising Hold** and click on **Release**, as illustrated below:



Registration Notices: 4 Holds: 1

Releasable Holds

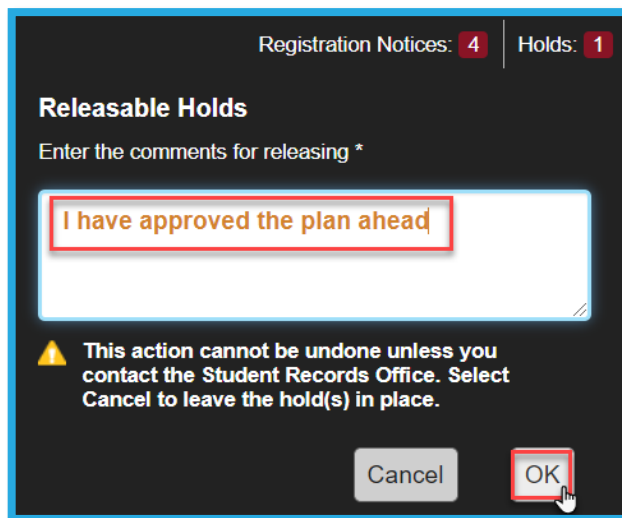
☒ *Advising Hold*

Reason: *Advising Hold*

Processes Affected: *Registration*

Release

4- Enter your comments for releasing the hold and then click on **OK**. A common comment is illustrated below:



Registration Notices: 4 Holds: 1

Releasable Holds

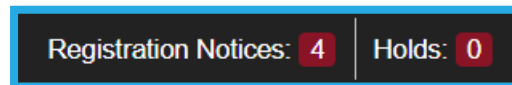
Enter the comments for releasing *

I have approved the plan ahead

⚠ This action cannot be undone unless you contact the Student Records Office. Select Cancel to leave the hold(s) in place.

Cancel OK

5- You shall notice that the Holds number has decreased by 1, as illustrated below:



Registration Notices: 4 Holds: 0