

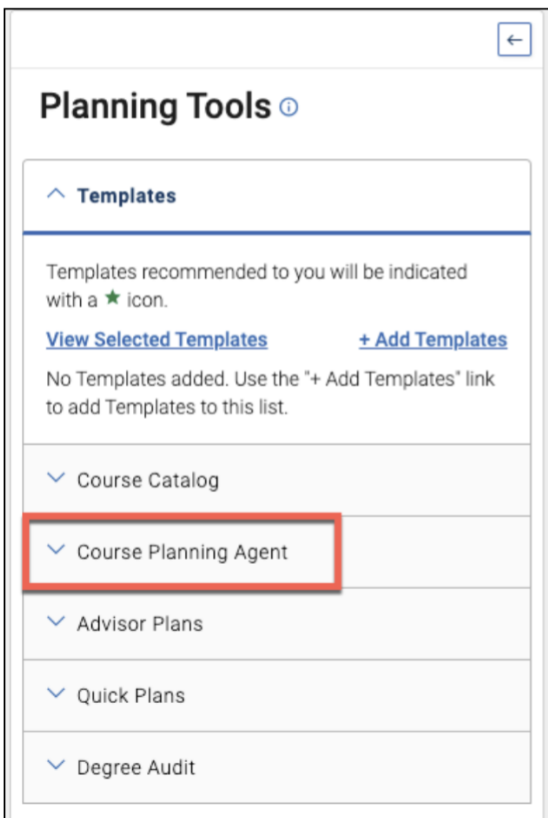
## Feature Overview

Course Planning Agent is a personalized self-service planning option for students and advisors that is available any time they need it. This feature must be enabled by your institution for it to be available and the student and advisor roles need the *Access the Course Planning Agent in Academic Planner* permission to access Course Planning Agent.

The screenshot displays the 'My Planner' interface. At the top, the title 'My Planner' is followed by a circular icon. Below this, the text 'My Goals: BA Graphic-Design | Finance' is shown, with links for 'Hand Raise' and 'Feedback'. The left sidebar contains a navigation menu with sections: 'Course Catalog', 'Course Planning Agent' (which is expanded), 'Upload Document' (with a sub-note about uploading documents), 'Launch Course Planning Agent', 'My Uploaded Docs' (listing two documents: 'Degree Audit Report - Grady Heymans.docx' and 'Degree Requirements for BA in Graphic Design.docx'), 'Advisor Plans', 'Quick Plans', and 'Degree Audit'. The main content area on the right features a chatbot interface. It starts with a consent message: 'By initiating this chat, you consent to the use of this chatbot application provided by EAB, our third-party service provider and OpenAI, their third-party service provider. EAB and Woodley will record and maintain a transcript of this chat. For further information about our information practices, please see our Privacy Policy -> [here](#)'. This is followed by a greeting from the Course Planning Agent: 'Hello! I am the Course Planning Agent. Ready to help you plan courses for current and future terms. How can I help you today?'. At the bottom of the chat area is a text input field with the placeholder 'Ask me a question' and a send button.


## Student Use of Course Planning Agent

Students access Course Planning Agent in Academic Planner in Navigate360 Student desktop. Once in Academic Planner, students access Course Planning Agent in the left menu. In this example, Course Planning Agent is listed as the Course Planning Agent. Administrators can rename the Course Planning Agent at any time.



## Uploading Documents to Course Planning Agent


To facilitate Course Planning Agent's advice, students can upload their degree audit or degree requirements documents to the bot. As mentioned in the [Course Planning Agent administration](#) article, your institution may also upload useful documents like course catalogs for Course Planning Agent for all students. The uploads in My Planner are for the student.

 **Course Planning Agent**


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[Upload Document](#)  
Try uploading a document of your progress to your degree.  
[Launch Course Planning Agent](#)

**My Uploaded Docs**

[Degree Audit Report - Grady Heymans.docx](#)

Added on: 09/19/2024  
Category: Degree Audit Document

[Degree Requirements for BA in Graphic Design.docx](#)

Added on: 09/19/2024  
Category: Degree Requirements Document

When uploading a document, students are limited to three options: a degree audit document, a degree requirements document, or other document. Other documents will be less useful to Course Planning Agent. There is a limit of three "other documents" when uploading.

# Advisor Use of Course Planning Agent

To use Course Planning Agent as an advisor, the user first needs to open an assigned student's profile and then open the **Academic Plan** tab.

Grady Heymans

Overview

Success Progress

History

Courses

Major Explorer

Checklist

Academic Plan

Journeys

More

Course Grade D/F	Repeated Courses	Withdrawn Courses	Missed Success Markers	Cumulative GPA
0	0	0	0	3.93
Total Credits Earned	Credit Completion % at this Institution	Predicted Concern		
45.00	75%	Low <a href="#">View detail</a>		

Overview

Accounting

Associate of Science

College of Business

Student ID

97154230

Alternate ID

43057952

Classification

Sophomore

Most Recent Enrollment

Spring 2025



Advisors then query Course Planning Agent to help create an Academic Plan for their students and send that plan to the student. Review [Creating an Academic Plan for Students in Next Generation Academic Planner](#) for more information about that process.

### Academic Planner

Grady Heymans's Goals: [BA Graphic-Design](#) | [Finance](#)

[Feedback History](#) [Advisor View](#) ☐ [Student View](#)

Grady's Current Plan

by Grady Heymans

On: February 25, 2021 11:38 PM

Template Library

Course Catalog

The Course Planning Agent

Upload Document

Try uploading a document of your progress to your degree.

Launch The Course Planning Agent

My Uploaded Docs

Degree Audit Report - Grady Heymans.docx

Added on: 04/01/2025

Category: Degree Audit Document

Degree Requirements for BA in Graphic Design.docx

What courses should my student take next term?

To help determine which courses Grady Heymans should take next term, we need to consider the remaining degree requirements and any courses that have already been completed or planned. Let's start by checking the available terms for planning and the courses that have already been taken or planned. I'll gather that information now. The next available term for planning is "Spring 2031," which runs from January 4, 2031, to May 4, 2031.

Since I don't have the specific courses Grady has already taken or planned, let's focus on the remaining degree requirements. Here are some areas where Grady still needs to complete credits:

1. Humanities Requirement: Needs additional credits, including courses from ANTH, SOC, HIS, and ENG.

2. PSY, MDS, or CSC Requirement: Needs more credits in PSY, MDS, or CSC.

3. Science Requirement: Needs 6 credits in Science (BIO, CHEM, PHYS).

4. KIN or NUR Requirement: Needs 3 credits in KIN or NUR.

5. Elective Requirements: Needs additional elective credits.

6. Upper Level Major Courses: Needs upper-level credits for the major.

7. Upper Level Elective Requirements: Needs upper-level elective credits.

8. Capstone Project and Internship Requirements: These are typically completed in the senior year.

Based on these requirements, Grady could consider enrolling in courses that fulfill the Humanities, PSY/MDS/CSC, Science, or KIN/NUR requirements. Additionally, if there are any upper-level courses available that fit the major or elective requirements, those could be considered as well.

If you have specific courses in mind or need further assistance in selecting courses, feel free to let me know!

Like students, advisors can upload documents to the Course Planning Agent as outlined in that section.