HUB: Guide to Using My Planner

My Planner allows you to plan courses based on your program plan for an individual term, multiple terms, or for your entire program of study. Along with My Academic Requirements, you can view, add, and maintain the courses you need to take. Furthermore, My Planner allows you to enroll in specific classes from your planned courses when you are ready.

Preparing to Use My Planner
To ensure you are maintaining academic standards and eligibility for continued enrollment, financial aid, and participation in university activities, you will need to regularly review the grades and progress towards your degree by viewing your Academic Advisement Report (AAR). Please note that a similar review of your undergraduate grades and progress is being conducted on a regular basis by the University. Running the AAR and planning your courses will assist you in making timely progress toward your degree.

Determining which courses to add to your Planner
There are a few places where you can retrieve information on course requirements, including prerequisites for your major/minor or any major/minor that UB offers. They are outlined below:

1. Recommended Sequence of Program Requirements
The Undergraduate Catalog contains a recommended sequence of courses for all majors. This can be found by going to the Undergraduate Catalog ([http://undergrad‐catalog.buffalo.edu/](http://undergrad‐catalog.buffalo.edu/)). From the top menu, click on Academic Programs.

Select a major

Finally, click on “Degrees & Policies” on the left side navigation pane.
You can then either do a search for “Recommended Sequence of Program Requirements” using your web browser search feature, or simply scroll down the this section. This can be used as a guide when planning out courses in the planner.

2. Running the AAR
(A complete instructional version can be found at: http://www.buffalo.edu/hub/students/pdfs/understandingMyAdvisementReport.pdf)

While in your Student Center click on the My Academics link.

To view your advisement reports, click on the View Your Advisement Reports link in the Academic Requirements Group.

Once you've clicked the link you have the option of viewing your report on the web, or by printing it. If you would like to print the report, click the “Printable Version” link.

Notice the Course Status icons (Taken, In Progress, Planned) that are used throughout the report.

Use the expand all button to view your report.

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Throughout your report you will see the following blue bars. These areas are the areas that you will need to ensure you’ve completed the proper degree requirements. These are unique to your specific program of study.

If you have satisfied an area, you will see a statement similar to the illustration shown to the right.

If you have not satisfied all the requirements for an area, you will see a similar illustration as shown to the right.

It is these requirements that we’ll want to concentrate on and plan our future courses. From the example above, we see that this student needs to take MGE 302LEC to fulfill the Applied Economics requirement for their degree.

3. **Finish in Four Curricular Plans or Other Degree Tracking Documents**

Some departments may post on-line or distribute documents containing what are often referred to as: Curricular Plans, Degree Charts or Flowsheets. Please ensure that if you are using an advisement tool such as this to plan your requirements that it is an updated version and comes directly from the department.
Adding Courses to the Planner
From the Student Center page, under Academics, click on the “Plan” link or “ Academic Planner” under the dropdown box.

It is recommended you add course to My Planner using the “Plan By My Requirements” option.

Once you click the “Plan By My Requirements” button, the My Academic Requirements will appear.

Scroll down to a course that you plan to take. Most likely, you will choose a course from an area that as listed as “Not Satisfied”.

Click on the course description.
Click on the “add to planner” button.

Once you’ve added the course to your planner, you will get a confirmation that the course was added to your Planner.

Use the “Return to Plan by My Requirements” link to add more courses to your planner. Progress throughout the “My Requirements” screen and add all the required courses you’ll need to complete your degree to your planner.
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Alternatively you can use the ‘Browse Course Catalog’ option; this option should only be used to plan a course that is not part of the curriculum in ‘Plan By My Requirements.’ This option may be useful in planning courses for a second major or a minor, courses should be added through this option and then you should run a What-If report to see how they would satisfy requirements for that major or minor. A job aid for the What-If report is located at http://www.buffalo.edu/hub/students/pdfs/GuideMyPlanner.pdf.

Click on ‘Browse Course Catalog’

Click on the letter of the department that you are interested in, for this example we will use Chemistry, the department code is ‘CHE’, so we will click on ‘C’
A listing of all departments that start with C will appear.

Click on the arrow next to Chemistry, and all Chemistry courses from the course catalog will appear as well as typically offered information for each course. For this example we will be adding CHE 101 and CHE 105 to our planner, therefore we check the boxes next to each course.

Scroll to the top of the page and click ‘Add to Planner’

A message will appear confirming that the courses were added to your planner, in this case CHE 101 and CHE 105.

Adding courses to your Planner does not mean that you are enrolling for the courses. This tool simply helps you plan the courses you will be taking throughout your academic career.
Once you've added all the required courses to your planner, click the “my planner” tab at the top of the page to return to the My Planner page.
Maintaining Courses in My Planner

By default, the courses you have just added will fall under the “Unassigned Courses” category. We now need to plan the courses to fit specific terms.

To move your course(s) to a particular term, click on the checkbox next to the course(s).

Pay close attention to the typically offered column. This information is provided as to when a course is typically offered, but it is not a guarantee that the course will be offered in the term you need it. You can, however, use it for planning purposes.

Next, select the term you wish to place these courses in from the drop down box.

Finally, click the move button to add the courses to that singular term.
After you click the “move” button, you’ll see that above the list of unassigned courses, a confirmation that the courses have been moved to a specific term appears.

Further, you’ll see below the unassigned list of courses, a table for a specific term that has the classes.

Within this table, if you decide to delete a course you can use the trash can to delete it from a term.

You can also move one of these courses to another term if you want to. Just click in the checkbox, select another term, and click the “move” button.

**Enrolling in Classes from Planned Courses**

Once you’ve got your plan all set, you’ll want to make sure you enroll in the courses during your registration window. Using the Planner makes this process extremely simple.

While in your planner, click on the Enroll menu option from the top navigation.

You’ll be asked what term you want to enroll. Then click the green Continue button.
Next, you’ll be taken to a screen that looks similar to the illustration to the right. Click on the option “My Planner”, then click the green “search” button.

The next screen will show you the courses you have in your planner that correspond to the term you wish to enroll. Click on the green select button for a specific course you wish to enroll.

Next, select the section of the course you wish to enroll.
On the next screen, you will be asked to confirm this is the class you want to enroll. At this point, your class will be added to your shopping cart. Click the “Next” button.

When the course is added to your shopping cart, you will receive a green confirmation.

Adding courses to your Shopping Cart does not enroll you in a course – see the next steps for course enrollment.
Again, you’ll be asked to confirm that this course section is the one you wish to enroll. Click on the green “Proceed to Step 2 of 3” button to continue the enrollment process.

There is one more final time to confirm this course section is the one you want to enroll. If it is, click on the green button “Finish Enrolling”.

You have successfully enrolled when you see a similar illustration as shown to the right.

This concludes this tutorial.