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## Student Planning Advisor Training

### Colleague Student Planning & Advising Overview

Colleague Student Planning & Advising is an interactive web application that enables users to view their individual or advisee information contained in SHU's Colleague® database.

### Colleague Student Planning & Advising modules

Colleague Student Planning & Advising consists of a number of modules that enable users to complete tasks.

#### ***Student Planning is the Self-Service module we will be working with.***

Colleague Student Planning & Advising enables students to better plan and register for the courses they need to complete their academic program.

In the Colleague Student Planning & Advising module, students can perform academic planning activities such as searching for courses, planning their terms, and scheduling and registering for course sections.

Student Planning allows a student and advisor to work together to achieve the desired outcome for a selected course plan.

***Using the Advising pages, advisors can access advisees to provide guidance and feedback on their academic planning.***

Hello, Welcome to Colleague Self-Service!

Choose a category to get started.



#### Student Planning

Here you can search for courses, plan your terms, and schedule & register your course sections.



#### Course Catalog

Here you can view and search in course catalog



#### Advising

Here you can access your advisees and provide guidance & feedback on their academic planning.

## To Review a Student's Plan and Approve/Deny Courses

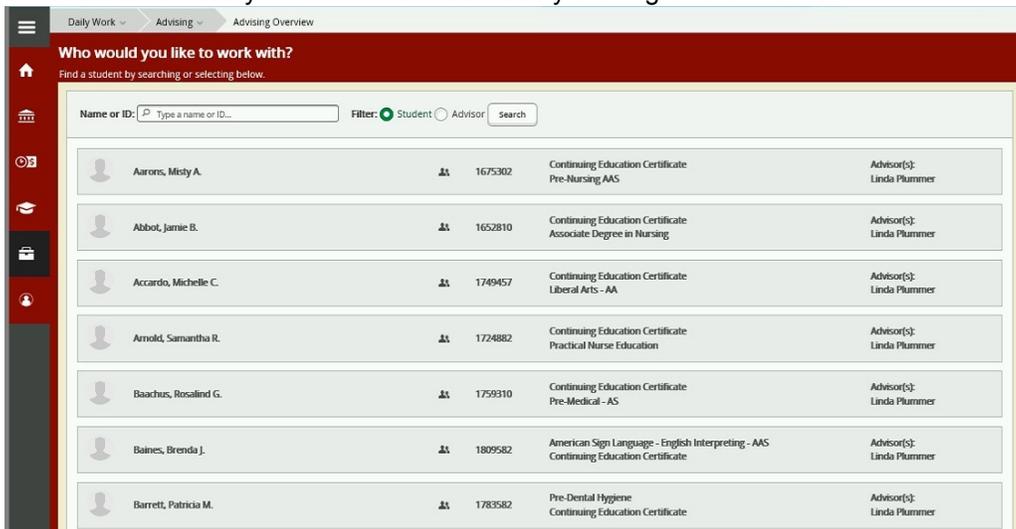
To log in to Colleague Student Planning & Advising go to MYSHU portal and click on Colleague Student Planning & Advising (SPA) and login with your credentials (**be sure to login with your user name in lower case letters.**) This link will take you to the Student Planning module.

Select the Advising Tab



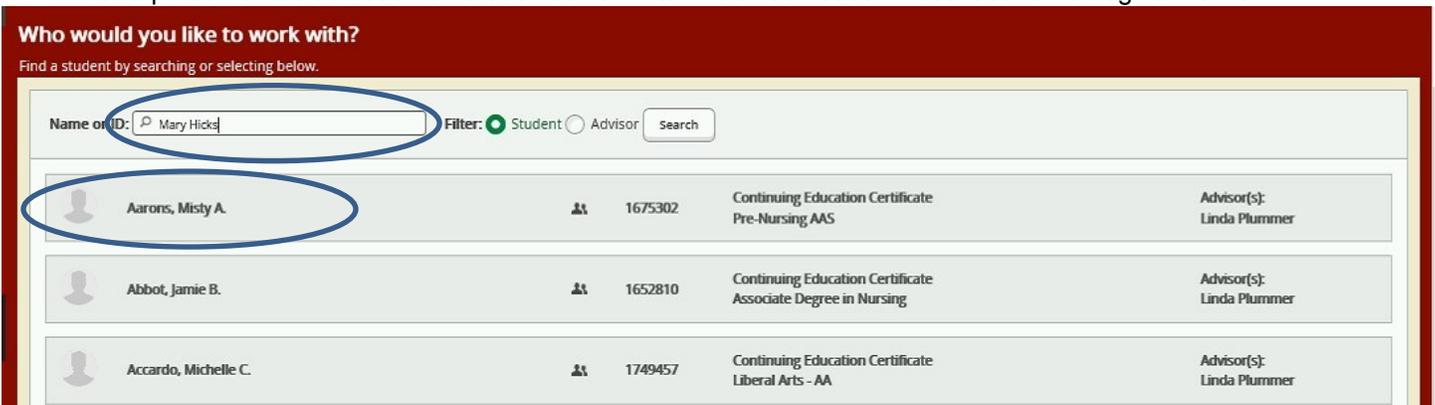
***You can view the list of your advisees on this page. Advisees who have requested a review of their plan will appear first in the list.***

Choose the Advisee you would like to access by clicking on their name:

A screenshot of the "Who would you like to work with?" interface. At the top, there is a search bar with the placeholder text "Name or ID: Type a name or ID...". To the right of the search bar are filter options: "Filter: Student" (selected) and "Advisor". Below the search bar is a table with columns for Name, ID, Program, and Advisor(s). The table lists several students, including Aarons, Misty A., Abbot, Jamie B., Accardo, Michelle C., Arnold, Samantha R., Baachus, Rosalind G., Baines, Brenda J., and Barrett, Patricia M. Each row includes a small profile icon, the student's name, ID number, program name, and the name of their advisor(s).

Or use the Search box to search for a particular advisee.

- Enter the advisee ID number with leading zeroes.
- Enter the advisee name in either first name and last name order, or last name, comma, first name order.
- Enter a portion of the advisee name such as "Smi" to find all advisees whose last name begins with "smi".

A screenshot of the search interface showing the search results. The search bar contains the text "Mary Hicks". The filter options are "Filter: Student" (selected) and "Advisor". The search results table shows three students: Aarons, Misty A., Abbot, Jamie B., and Accardo, Michelle C. The first row, for Aarons, Misty A., is circled in blue. The search bar and the first row of results are also circled in blue.

Your advisees can request a review of their plan at any time. If they request a review, you will receive email notification. You will also have a notification when you log in and those advisees will pop to the top with an hourglass notification next to the requesting advisee's name.

The screenshot shows the 'Advising Overview' page. At the top right, a notification bubble states: 'You have one or more advisees who have requested a review.' Below this, the 'Who would you like to work with?' section lists students. The first student, Mary D. Hicks, is circled in blue. Her details are: Name: Hicks, Mary D.; ID: 1797739; Program: Elementary Education - AA; Advisor: Linda Plummer. The second student is Aarons, Misty A.; ID: 1675302; Program: Continuing Education Certificate Pre-Nursing AAS; Advisor: Linda Plummer.

We're going to go through each of the tabs individually but we're going to start with Progress.

### Progress

The **Progress** tab is a student's degree audit/program evaluation.

**Student information is displayed at the top which includes their program, their Cumulative and Institutional GPAs, degree, major, department, catalog, progress toward the degree, total credit completed, total credits toward residency. How to Read a Student's Progress is available on the Registrar's Website.**

The screenshot shows the 'Progress' tab for Mary D. Hicks. At the top, her name and student ID (1797739) are displayed, along with a 'Review Complete' button. Below this, a navigation bar includes tabs for Course Plan, Timeline, Progress (selected), Course Catalog, Notes, Plan Archive, Test Scores, Unofficial Transcript, and Grades. The main content area shows 'Elementary Education - AA' (1 of 1 programs) and a 'View a New Program' button. Under 'At a Glance', the following information is shown: Cumulative GPA: 3.165 (2,000 required); Institution GPA: 3.165 (2,000 required); Degree: Associate in Arts; Majors: Education; Departments: Education; Catalog: 2015. A description of the program is provided: 'Arts and Science/Liberal Studies'. A 'Program Notes' section is also visible. On the right, a progress bar shows 'Total Credits (22 of 62)' with 6 credits completed (green) and 16 remaining (yellow). Below this, 'Total Credits from this School (22 of 16)' shows 6 credits completed (green) and 16 remaining (yellow).

**Progress is now an interactive degree audit.**

**For example, if you are working with a student and you want to help them choose a Literature requirement, you can click the Search box to see the list of courses that will meet that requirement.**

**B. ARTS & HUMANITIES**

Note that DRA-110 is listed as a course option for both Humanities and Fine Arts -it may be counted for either category but not both. Degree Audit may automatically apply DRA-110 to Humanities when you want it to be applied to Fine Arts. The Registrar at your college can make this adjustment if needed.

Complete all of the following items. **0 of 3 Completed.** [Hide Details](#)

1. TAKE ONE COURSE IN LITERATURE: LIT-101 LIT-111 LIT-183 OR LIT-185 **0 of 3 Credits Completed.** [Hide Details](#)

Status	Course	Grade	Term	Credits
Not Started	<a href="#">LIT-101</a> Intro to Literature	<input type="text" value="Search"/>		
Not Started	<a href="#">LIT-183</a> Masterpieces: Neoclass-Modern			
Not Started	<a href="#">LIT-111</a> American Lit Since Mid-1800's			
Not Started	<a href="#">LIT-185</a> Contemporary Literature			

2. TAKE ONE COURSE IN HUMANITIES: DRA-110 HUM-110 HUM-183 PHI-101 PHI-110 REL-101 OR PHI-105 **0 of 3 Credits Completed.** [Hide Details](#)

Status	Course	Grade	Term	Credits
Not Started	<a href="#">HUM-110</a> Changes & Choices	<input type="text" value="Search"/>		
Not Started	<a href="#">HUM-183</a> Living With Space Time & Tech			
Not Started	<a href="#">PHI-101</a> Intro to Philosophy			
Not Started	<a href="#">PHI-110</a> Intro to Logic			
Not Started	<a href="#">REL-101</a> Survey of World Religions			
Not Started	<a href="#">PHI-105</a> Intro to Ethics			

It takes you over to the [Course Catalog](#) and lists the courses that meet the requirement. From here, you see all the active courses that meet your search criteria.

**Using the Filters on the left, you can filter the list by what sections are available by choosing a term, instructor, time of day, location, levels, and course types.**

Use the Filters on the left to filter the list to sections that are available by choosing a term, instructor, time of day, location, levels, and/or course types.

Course Plan | Timeline | Progress | Course Catalog | Notes | Plan Archive | Test Scores | Unofficial Transcript | Grades

< Back To Course Catalog

**Filter Results**      **The following results match requirement: TAKE ONE COURSE IN LITERATURE: LIT-101 LIT-111 LIT-183 OR LIT-185**  
 Filters Applied: None

**SUBJECTS**

- Literature (4)

**LOCATIONS**

- Clinton Community College (1)
- Muscatine Community College (1)
- Online (3)
- Scott Community College (3)

**TERMS**

- 2016 Fall Term (3)
- 2016SP (3)
- 2016SU (3)

**DAYS OF WEEK**

- Monday (3)
- Tuesday (1)
- Wednesday (3)
- Thursday (1)
- Friday (2)

**TIME OF DAY**

Select time range...

**INSTRUCTORS**

- Bakeris-Gullion, M (1)
- Baldwin, D (1)
- Rimmma, A (1)

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**Add Course to Plan**

This course offers an introduction to the major literary genres: the short story, poetry, drama and the novel. Emphasis is on learning the basic elements of each genre and applying those elements as tools of literary interpretation through critical reading and writing.

**Requisites:** Complete ENG-105 or ENG-107 with a grade of D- or better. - Must be completed prior to taking this course.

[View Available Sections for LIT-101](#)

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**Add Course to Plan**

This course introduces literary works in four genres (the short story, poetry, drama, and the novel) by American authors from 1865 to the present, with a focus on themes and formal characteristics that define American literature. Emphasis is on learning the basic elements of each genre and applying those elements as tools of literary interpretation through critical reading and writing.

**Requisites:** Complete ENG-105 or ENG-107 with a grade of D- or better. - Must be completed prior to taking this course.

[View Available Sections for LIT-111](#)

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**Add Course to Plan**

This course is an introduction to major works of literature from the 17th Century to the present. Attention is given to the personal and social values of the period through the study of the four primary literary genres: the short story, poetry, drama, and the novel. Emphasis is on learning the basic elements of each genre and applying those elements as tools of literary interpretation through critical reading and writing.

**View a New Program**

***A student may want to change their major. By using "View a New Program" you can see the new requirements. This may affect the student's progress towards graduation. If a student wants to change their major, direct them to the new major department.***

View the degree requirements for any program an advisee may be interested in, by searching and selecting a program from the list.

Review the related programs during each advising session in order to assist students in selecting courses or electives that may enable them to complete an additional degree or certificate.

**Academic Programs**

View the degree requirements for any program you are interested in, by searching and selecting a program below.

Select from one of the following programs related to the student's current program(s):

Programs	Progress
<input type="radio"/> Early Childhood Education - AAS	<div style="width: 50%;"></div>
<input type="radio"/> Education - AA	<div style="width: 50%;"></div>
<input type="radio"/> Liberal Arts - AA	<div style="width: 50%;"></div>

Or, choose a different program:

- Accounting Man - AAS
- Accounting Man - DPL
- Administrative & Office Support Certificate
- Administrative & Office Support Diploma
- Administrative Office and Support - AAS
- Advanced EMT - CERT
- Agribusiness Equipment Sales and Service - Diploma
- Agribusiness Equipment Technician - AAS
- Agribusiness Management - AAS

Select a program the student is interested in

□ Click **View Program**

**You will see what the student's requirements and credits look like in that program. This will not change the student's major. They will still need to go through the official change of major process.**

**Mary D. Hicks**  
Student ID: 1797739  
Program(s): Elementary Education - AA  
Educational Goal: Meet Ctf/Lic Requirements  
Advisor(s): Linda Plummer  
tiperkins@eicc.edu

Course Plan | Timeline | Progress | Course Catalog | Notes | Plan Archive | Test Scores | Unofficial Transcript | Grades

Early Childhood Education - CERT (2 of 2 programs)

Student is not enrolled in this program. The display of this program information is temporary and it will be removed as you leave or refresh this page.

**At a Glance**

Cumulative GPA: 3.165 (2.000 required)  
Institution GPA: 3.165 (2.000 required)  
Majors: Child Care  
CCDS: Certificate  
Departments: Child Care  
Catalog: 2016

Description: Child Care Management

Program Notes: Show Program Notes

Progress: Program Completion must be verified by the Registrar.

Total Credits (25 of 18): 6 / 19 / 18

Total Credits from this School (25 of 4): 6 / 19 / 4

## Course Plan

The **Course Plan** will default to the current term if the student is currently registered or if they are not registered, it will default to the last term registered.

You can switch between the **List** view and the **Calendar** View

Daily Work | Advising | Advising Overview

Back to Advisees

Mary D. Hicks  
Student ID: 1797739  
Program(s): Elementary Education - AA  
Educational Goal: Meet Ctf/Lic Requirements  
Advisor(s): Linda Plummer

Course Plan | Timeline | Progress | Course Catalog | Notes | Plan Archive | Test Scores | Unofficial Transcript | Grades

2016 Spring Term | Planned: 0 Credits | Enrolled: 3 Credits | Waitlisted: 0 Credits

List | Calendar

Approve | Deny | Protect | Unprotect

Select	Approval	Course	Credits	Instructor	Time	Location
<input type="checkbox"/>	Completed	EDU-212-SHS02: Educational Foundations	3	Woods, C	MTWThF 1:40 PM - 3:02 PM 1/18/2016 - 3/18/2016	Scott Community College Davenport North High School, TBA Lecture

The **Calendar** view is more beneficial when you are helping a student plan their schedule for a particular term because you can easily see section conflicts by clicking **View other sections**. It is not necessary for you to assist students with scheduling but this is a good feature to either check on what they are doing or to help them.

Course Plan | Timeline | Progress | Course Catalog | Notes | Plan Archive | Test Scores | Unofficial Transcript | Grades

2016 Fall Term | Planned: 6 Credits | Enrolled: 0 Credits | Waitlisted: 0 Credits | Remove Planned Courses

Calendar

ENG-105: Composition I

Complete ENG-013 with a grade of D- or better, or minimum English placement score based on college assessment. - Must be completed prior to taking this course.

View other sections

ENG-105-CHS01:  
Composition I  
Seats Available: Unlimited  
Instructor: Rickords, M  
Time: MTWThF 9:45 AM - 11:05 AM  
Dates: 8/23/2016 - 12/22/2016  
Location: Clinton Community College Northeast High School TBA (Lecture)

ENG-105-CHS02:

From the **Course Plan**, you can see what the advisee has planned. A student can plan to take both courses and sections. You can also **Approve**, **Deny** and **Protect** courses. Planned courses will show on the left hand side and specifically planned sections will appear on the calendar grid.

Student Planning will give a warning that a prerequisite or corequisite exist for a course if it is not currently planned, in progress or completed. Some sections are restricted to a specific group of students (for example, Honor students.) To view a restriction for a course section click on the section link within the calendar grid to view the restriction details.

**In the example below, the advisor has already approved two courses and denied ENG-105 because he/she doesn't think it is a good idea for the student to take it yet. She must meet the prerequisite.**

**Please note: Just because you deny the course does not mean it will stop a student from taking it if all conditions are met.**

Course Plan | Timeline | Progress | Course Catalog | Notes | Plan Archive | Test Scores | Unofficial Transcript | Grades

2016 Fall Term | Planned: 13 Credits | Enrolled: 0 Credits | Waitlisted: 0 Credits | Remove Planned Courses

Calendar

Approve | Deny | Protect | Unprotect

Select	Approval	Course	Credits	Instructor	Time	Location
<input type="checkbox"/>		BIO-105: Introductory Biology Complete RDG-032/033 with a grade of D- or better or minimum reading placement score based on college assessment. - Must be completed prior to taking this course.	4	No Section Selected	No Section Selected	No Section Selected
<input type="checkbox"/>		ENG-105: Composition I Complete ENG-013 with a grade of D- or better, or minimum English placement score based on college assessment. - Must be completed prior to taking this course.	3	No Section Selected	No Section Selected	No Section Selected
<input type="checkbox"/>		MUS-100: Music Appreciation	3	No Section Selected	No Section Selected	No Section Selected
<input type="checkbox"/>		SPC-112: Public Speaking	3	No Section Selected	No Section Selected	No Section Selected

**You can also Protect a course. This will keep a student from moving it to a future term or removing it. This is a good idea if we know the course is only offered in that term or may not be offered again for a year. You may also want to protect the course because the student has been avoiding taking the course. You can remove the lock by selecting the course and then Unprotect.**

## Timeline

You can also choose the **Timeline** to see future, past terms and multiple terms at the same time.

The number of planned, enrolled or completed credits appear at the bottom of each term. The GPA appears if the term is completed.

On the **Timeline** view, you can remove planned courses.

**The planned course you denied can be removed from the student's plan. Keep in mind, the actions you perform are reflected on the student side, so if you remove it from their plan, the student will see that it's gone.**

**If you want to remove all the planned courses for a term that has not started, you can select Remove Planned Courses and choose the term. You cannot undo this option, so be careful! DO NOT USE THIS OPTION!!!**

You do have the ability to move planned courses to future terms, add or delete courses or even assist a student in registering for a course. However, we recommend that you leave those tasks to the students.

## Notes

Once a student requests a course plan review, select the **Notes** tab to view notes to and from the advisee. All notes made for the student's plan are listed. Add a note to the plan in the **Compose a Note** section.

The **Notes** tab should be used to send a note to your advisee and your advisee can send a note to you as well. Please be careful when sending notes because once saved, they cannot be edited or deleted. The notes do remain with the student's record, so if a student changes majors or advisors, it will still be accessible to any advisor who can view the student's plan.

The notes are considered a part of the student's record under FERPA and should be one of your primary methods of communicating with and maintaining notes on the advisee.

Daily Work > Advising > Advising Overview

< Back to Advisees Search for courses...

**Mary D. Hicks**  
 Student ID: 1797739  
 Program(s): Elementary Education - AA  
 Educational Goal: Meet Ctf/Lic Requirements  
 Advisor(s): Linda Plummer

Review Complete

Course Plan | **Timeline** | Progress | Course Catalog | Notes | Plan Archive | Test Scores | Unofficial Transcript | Grades

**Compose a Note**

Save Note

**View Note History**

Hi Mary,  
 Great job of planning. I have approved your Math and Speech class but denied your English class because you must complete the prereq first.

Please register after reviewing.  
 Thanks.

Plummer, Linda M. on 12/4/2016 at 11:27 PM

### Completing the Review

Once satisfied with the student's plan, mark it complete by the clicking **Review Complete**. This will alert the student that you have reviewed the plan. It will also let you know the review is complete and ask if you want to archive the plan.

Linda | Sign out | Help | 2

✓ The review has been completed. ✕

i Would you like to archive this course plan?

Cancel Archive

***You always want to archive the plan! Each time you complete a review of a course plan, a notification is generated that indicates the review is complete and asks if you would like to archive the reviewed course plan. When you select "Archive," Student Planning takes a snapshot of the course plan as it is and generates an entry on the Plan Archive tab for that student in the Advisor view.***

Always archive the plan by clicking the **Archive** button. Archived Plans are permanently saved and remain with the student's record.

***When you want to view an archived course plan, select the Plan Archive tab. A list of all the archived course plans is displayed. Click the Download PDF link for the version of the course plan you want to view. When prompted by your browser, open the PDF to see all the details of the course plan as it looked at the time it was archived.***

To view the plan, select the **Plan Archive** tab. A list of all the archived course plans is displayed.

- Click the **Download PDF** link for the version of the course plan you want to view.
- When prompted by your browser, open the PDF to see all the details of the course plan as it looked at the time it was archived.

Course Plan	Timeline	Progress	Course Catalog	Notes	Plan Archive	Test Scores	Unofficial Transcript	Grades
Archived PDF					Archive Date			Archived By
<a href="#">Download</a>					12/4/2016 11:34:57 PM			Plummer, Linda

Do you want to open or save **Hicks\_Mary\_1797739\_12\_4\_2016\_11\_34\_PM.pdf** from **eiccd-coll-sst.eiccd.net?**

Open Save Cancel

**The archived plans includes all notes from the student and/or advisors as well as any classes approved or denied by the advisor. It also indicates who added courses to the plan and when they were added.**

**Advisors and administrators have access to the plans.**

### How is the advisor block lifted?

Once you are satisfied with the student's plan you must follow these steps to have the student's advisor block lifted:

1. You must approve at least one course for the semester that the student will be registering.
2. You must click on Review Complete
3. You must archive the plan

**These steps are important – an automated process will run every 15 and 45 minutes after the hour and will end the block when all three of the above steps have been completed. This process needs to be repeated for each Fall and Spring registration period.**

### Grades

You can also click the **Grades** tab to view the advisee's grades by terms.

Course Plan	Timeline	Progress	Course Catalog	Notes	Plan Archive	Test Scores	Unofficial Transcript	Grades
<b>2016 Spring Term</b> Term GPA: 3.330								
Course Section	Title	Final Grade	Midterm 1	Midterm 2	Midterm 3	Midterm 4	Credits	
EDU-212-SH502 1/18/2016 - 3/18/2016	Educational Foundations	B+	B+				3	
<b>2015 Fall Term</b> Term GPA: 3.000								
Course Section	Title	Final Grade	Midterm 1	Midterm 2	Midterm 3	Midterm 4	Credits	
MAT-110-SH504 8/24/2015 - 10/23/2015	Math For Liberal Arts	B	B				3	

### Help

There is a Help menu at the top of the page. The Help menu has a detailed list of the most the common questions for each section that you are viewing. It covers most of the basic functions of Student Planning.