Quick Notes to complete a Plan
1. Load a pre-defined plan or build a plan
2. Save Plan
3. Customize plan (drag & drop courses, delete courses)
4. Save Plan
5. Load
6. Click CHECK ALL TERMS
7. Click Process New
8. Review Student's Audit
9. Make Corrections to plan
10. Make notes at bottom for advisee
11. Click Process New
12. Put Check in Active field
13. Put Check in Lock field
14. Click Save Plan
15. If you want to print Plan the Calendar Mode is less paper.

General Planner Reminders
• Every Student must have an Active and Locked Plan for the duration of their time at EKU.
• Students cannot make change to an Active and Locked Plan.
• Student can Save As an Active and Locked Plan.
• Green Balloon = Student has taken all of the courses that were planned for the term (Balloon will not show up until the grades are posted for the term)
• Red Balloon = Student has not taken at least one of the courses that was planned for the term (Balloon will not show up until the grades are posted for the term)
• The Active/Locked Plan is the first one listed in the drop-down window of the plans.
• When you create a Plan SAVE often. Do not exit the planner until you save the plan. If you do exit before saving you will lose the plan you have been working on. You will NOT receive a warning to save. Moto is SAVE, SAVE, and SAVE again.
• Delete a Plan = make sure when you delete a plan to copy and save all Planning Notes that are applicable to the new plan. Make sure the plan you want to delete is the one that you are viewing. To copy notes highlight note with your mouse, hit the Ctrl C on your keyboard then go to the new plan under the Planning Notes area hit Ctrl V on your keyboard.
• Enter free text on a course line in a plan hit the dash the space on the keyboard enter information then enter the credit hours for this course (example: - Gen Ed Block VA)
• You can only have one Active/Locked Plan.
• You can have more than one Locked Plan.
• If student has more than 9 courses in term they click to the Plan vs. Taken to see all course. (example Music classes).