



# Degree Works User Guide

North Orange County Community College District

Version 1.0

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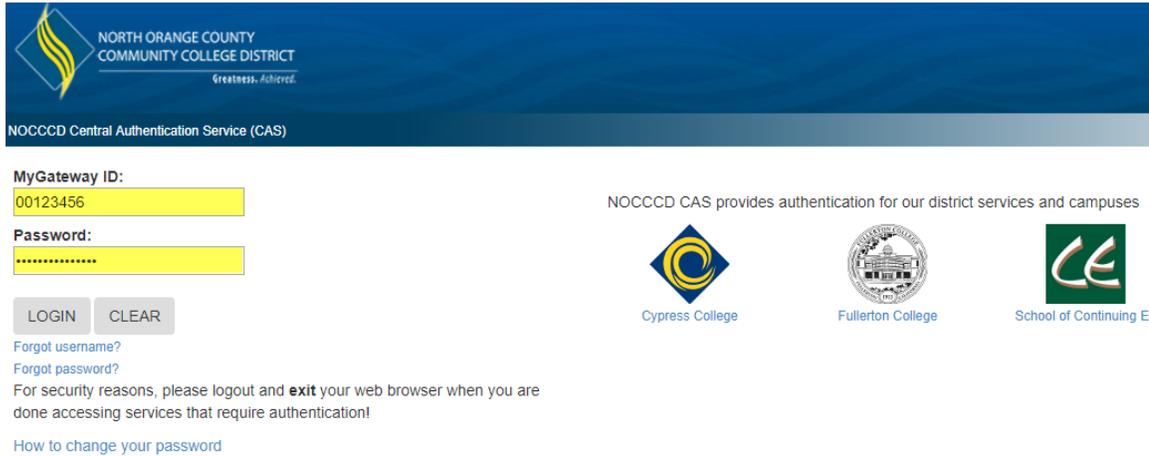
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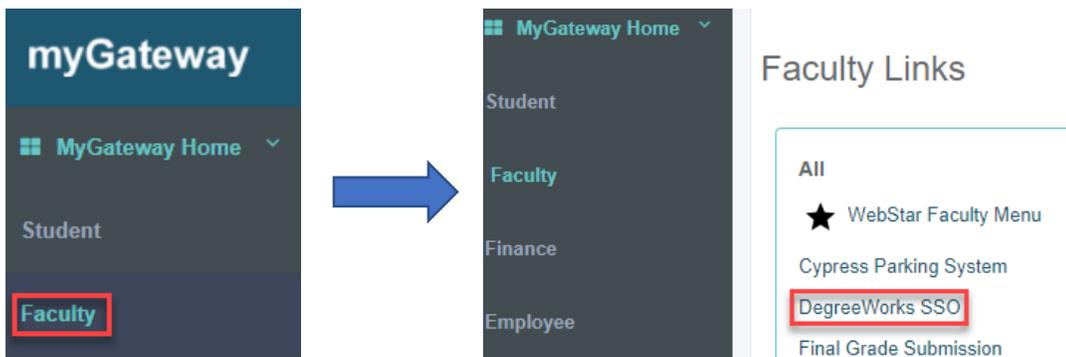
# Introduction

Welcome! This user guide will introduce you to Degree Works, a web-based system designed to assist students and advisors in monitoring academic progress towards degree/certificate requirements in an easy-to-read worksheet format. All students attending any of the three NOCCCD campuses (FC, CC, NOCE) to fulfill degree/certificate requirements can use Degree Works.

# Login Process



1. Enter your 8-digit Banner ID number (ex: 00123456) in the **MyGateway ID** field
2. Enter your password in the **Password** field
3. Click the **Login** button to continue. If login is successful, your myGateway home page will appear.
4. Click the **Faculty** link in the main menu panel on the left side of the page to display the Faculty page
5. In the **Faculty Links** section, click the **DegreeWorks SSO** link



6. The Degree Works main page will display

# Student Access

1. After successful myGateway login, click on the **Student** link in the main menu to display the Student page
2. In the **Student Links** section, click on the **DegreeWorks** image link (see below) to access Degree Works.



NEW! DegreeWorks Educational Plan

[Introduction to Degreeworks](#)

# Degree Works Main Page

- FERPA is a Federal law that is administered by the Family Policy Compliance Office (Office) in the U.S. Department of Education (Department). 20 U.S.C. § 1232g; 34 CFR Part 99. FERPA applies to all educational agencies and institutions (e.g., schools) that receive funding under any program administered by the Department. Parochial and private schools at the elementary and secondary levels generally do not receive such funding and are, therefore, not subject to FERPA. Private postsecondary schools, however, generally do receive such funding and are subject to FERPA.
- Once a student reaches 18 years of age or attends a postsecondary institution, he or she becomes an "eligible student," and all rights formerly given to parents under FERPA transfer to the student. The eligible student has the right to have access to his or her education records, the right to seek to have the records amended, the right to have control over the disclosure of personally identifiable information from the records (except in certain circumstances specified in the FERPA regulations, some of which are discussed below), and the right to file a complaint with the Department. The term "education records" is defined as those records that contain information directly related to a student and which are maintained by an educational agency or institution or by a party acting for the agency or institution.
- FERPA generally prohibits the improper disclosure of personally identifiable information derived from education records. Thus, information that an official obtained through personal knowledge or observation, or has heard orally from others, is not protected under FERPA. This remains applicable even if education records exist which contain that information, unless the official had an official role in making a determination that generated a protected education record.



The Degree Works main page consists of three areas, in addition to the FERPA compliance notice:

- Navigation Toolbar
- Student Summary Toolbar
- Worksheet Area

## Navigation Toolbar

The above toolbar will display at the top of every Degree Works page.

Option	Description
FAQ	View campus-specific Frequently Asked Questions (FAQ) pages
Help	Create a campus-specific District Help Desk request
Print	Print the currently displayed web page
Log Out	Exit Degree Works

## Student Search/Summary Bar

This bar is used to search for a student. When the student is located and selected, his/her information will display in the remaining fields of the bar.

Field/Icon	Description
	Student Finder button to search for a student if Banner ID number is not known
Student ID	Enter the student's Banner ID number, if known. Start with @ symbol first.
	Displays student's name. Use arrows to view students in a selected group, if available.
	Refreshes selected student's information from Banner
	Displays any notes entered for the selected student
The following non-editable fields displays selected student's information	
Degree	Displays current degree
Major	Displays current major
Campus	Displays current campus location
Last Audit	Last date audit was performed for student in Degree Works
Last Refresh	Last date and time the audit was refreshed from Banner

**Example:** After entering a valid student ID (starting with @ symbol), the selected student information appears:

## Student Finder

The Student Finder is a tool to search for students based on a set of criteria. The Student Finder can locate a student, student populations (a specific major/program for instance), or a group of students meeting any combination of available criteria set. To access, click the **Find** button at the far left of the *Student Search/Summary Bar*.

ID	Name	Degree	Major	Campus
<input checked="" type="checkbox"/>	[redacted]	AA	FC - Chemistry AA Degree	2

To search for a student, either:

- a. Enter the Banner ID number (start with @ symbol) in the *Student ID* field or
- b. Enter first and last name of the student in the respective fields (Use the @ symbol for wildcard searches)

Press the Enter key or click the **Search** button to start. Search results will appear at the bottom of the page.

If multiple student names appear, click the **Uncheck All** box at the bottom of the listing, find and click the box next to the desired student, and click **OK**. The selected student and information will populate the appropriate fields in the *Student Search/Summary Bar*.

To search for a group of students meeting a set of criteria:

1. Select the criteria from among the available categories. Each category is limited to one selected criteria.
2. As each criteria is selected, the criteria will appear in the *Chosen Repeatable Search Criteria* list box
3. To remove a selected criteria, find and highlight the criteria in the *Chosen Repeatable Search Criteria* list box and click the **Remove** button

The screenshot shows the 'Find Students' search interface. At the top, there is a search bar with three input fields: 'Student ID', 'First Name', and 'Last Name'. Below the search bar are several dropdown menus for selecting search criteria. The 'Campus' dropdown is currently open, showing a list of options including 'All Campus Codes', 'CC Prior to Fall 1989', 'Continuing Education', 'Cypress College', 'FC Prior to Fall 1989', 'Fullerton College' (which is highlighted in blue), 'SCE High School', and 'School of Continuing Education'. Other dropdown menus include 'Degree' (All Degree Codes), 'Major' (All Major Codes), 'Program' (All Program Codes), 'Student Type' (All Student Type Codes), 'Sport' (No Sport selected), 'Academic Standing' (No Academic Standing Selected), and 'Categorical Programs' (No Criteria Selected). Below these dropdowns is a 'Chosen Repeatable Search Criteria' list box containing the text 'PROGRAM: FC - AS Computer Information Systems'. To the right of this list box is a 'Remove' button.

4. Once all desired criteria are selected, click the **Search** button to start.
5. Search results will appear at the bottom of the page
6. Edit the search results, excluding students as needed
7. Click the **OK** button to import the records into the *Student Search/Summary Bar*
8. Use the arrow buttons appearing above the *Name* field (see screenshot below) to view each student in the selected group and make a selection. The *Name* drop-down menu can also be used to view the entire list of imported student records for selection.

The screenshot shows a search results table. The table has three columns: 'Student ID', 'Name', and 'Degree'. The 'Name' column has a dropdown menu open, showing a list of student names. The 'Degree' column has a dropdown menu set to 'AA'. There are buttons for 'Worksheets', 'Petitions', and 'View'.

## Notes

- If a student is newly admitted, he/she may not be in the Degree Works system yet. Please contact Degree Works Support if you need to review an audit for a newly admitted student after receiving a "Student Not Found" error message.
- A student may have multiple programs because they are attending multiple colleges. Use the Degree pull-down menu to change to a different program if available.

## Worksheets Tab

This tab is the default view for students when they log into Degree Works and used to review their academic progress. Note that the student cannot make any changes to this information. Any change to the program or major is done by a counselor.

## Formats

Other worksheet formats are available to view for the selected student. Click the **Format** drop-down box in the Worksheet tab and make a selection.

## Registration Checklist

This worksheet format will display the remaining courses needed to satisfy program or degree requirements.

Click on any listed course in the worksheet to display their respective catalog description and any prerequisites.

## Diagnostic Report

This report is a tool used to troubleshoot issues with an audit on the selected student.

Format: Diagnosics Report View Save as PDF Process New [Class History](#)

### Diagnosics Report

Student [REDACTED]  
 Audit AF066667  
 Date/Time 12/29/2016 at 19:28  
 Degree Works Release 4.1.1  
 Version dap14hnd.c#20 [4.1.1-June11-AL-dap14-Patch]  
 Percent Done 70%  
 Degree Works calculated GPA 3.16  
 Student System GPA 3.16

Block Title	Complete	Block ID	Type = Value	GPA	Classes Applied	Credits Applied
<input type="checkbox"/> <b>FC Associate of Arts Degree</b> <small>Secondary tags: (school=2)</small>	70% <div style="width: 70%; height: 10px; background: linear-gradient(to right, red, white);"></div>	RA000091	DEGREE = A	3.16	23	50.5
<input type="checkbox"/> <b>FC General Education</b>	88% <div style="width: 88%; height: 10px; background: linear-gradient(to right, red, white);"></div>	RA001536	OTHER = FCGE	2.84	7	26
<input type="checkbox"/> <b>FC Additional Requirements</b>	67% <div style="width: 67%; height: 10px; background: linear-gradient(to right, red, white);"></div>	RA001534	OTHER = FCAR	4.00	2	5

**Class Information section**  
 ANAT 231\_F, 240\_F, ANTH 102\_F, ART 110\_F, COUN 151\_F, HIST 127\_F, 270\_F, MATH 142\_F, N01\_F, NUTR 210\_F, PE 152\_F, 162\_F, 162\_F, 162\_F, 162\_F, 168\_F, 181\_F, 183\_F, 204\_F, 204\_F, 204\_F, 204\_F, 281\_F, POSC 100\_F, SPAN 101\_F, SPCH 100\_F

**Section Links**  
[Fall-Through<sup>14</sup>](#) / [Over-the-limit<sup>0</sup>](#) / [Insufficient<sup>0</sup>](#) / [In-progress<sup>0</sup>](#) / [Degree information](#) / [Exceptions<sup>0</sup>](#) / [Block Sharing](#) / [Class Chronology](#) / [Flags](#) / [Appendices](#)

Block	FC Associate of Arts Degree - 70%	2009 to 9999	GPA 3.16
RA000091: DEGREE = A		Classes applied: 23	Credits applied: 50.5
MinGPA 2 <small>Qualifier original fits: Label=Minimum 2.0 GPA requirement</small>			
60 Units			
Header Qualifiers			
Maxtransfer 30 units			
MaxCredits 30 in @@ (With DWTRANSFERSCHOOL = MILICR ) <small>Qualifier original fits:</small>			
MaxClasses 0 in @@ (With ATTRIBUTE = ND AND ATTRIBUTE <=> 2RDG AND ) <small>Qualifier original fits: [fits are not recorded when the max is zero]</small>			
Header Advice	9.5 Units needed		
If Statement	IF-Statement - <b>False</b>	Location: 24	
Requirement:	if (CONC = 2CSP and CONC <=> 2ICP and CONC <=> 2IGP) then		
~ Subset	X DEGREE-REQUIREMENTS - Not Used (n/a %)	Location: 31	Tag=4DR

## Process New

This function will update the selected student's worksheet in the event there are recent changes to the scribing for the major. Note that a new audit number is generated when the *Process New* function is completed.

Format: Student View View Save  Process New

## Legend

The legend, located on the left and near the bottom of the main page, is useful for understanding how the student information is displayed and categorized to the viewer.

Legend	Complete:
<input checked="" type="checkbox"/> Complete	Once a requirement is met, the box appears as checked in a green color
<input checked="" type="checkbox"/> Complete except for classes in-progress	Registered courses meeting a requirement for completion will display as a blue box containing a tilde (~) symbol
<input checked="" type="checkbox"/> Nearly Complete - see Advisor	Registered courses that qualify as part of a multi-course requirement will display as a blue box containing the approximate (≈) symbol
<input type="checkbox"/> Not Complete	A requirement that has not been registered for and completed
(T) Transfer Class	
@ Any course number	
* Prerequisites exist for this course	

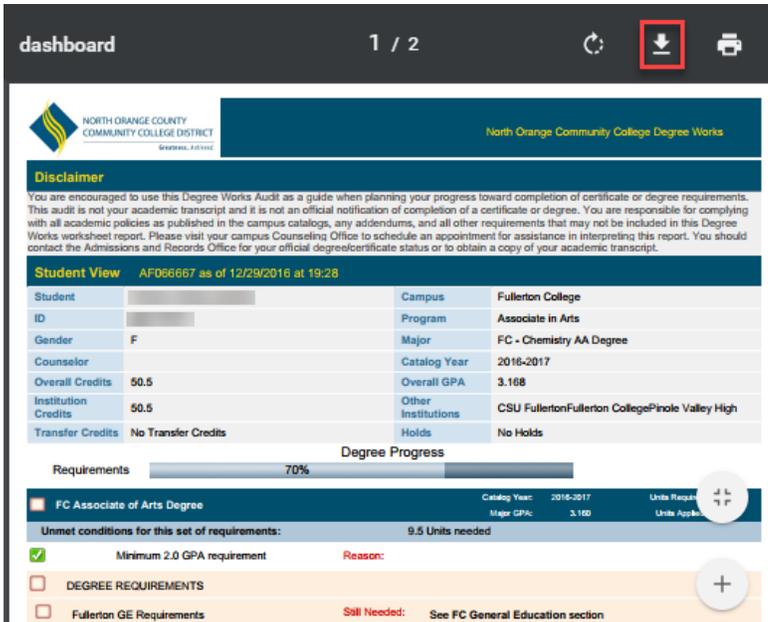
## Save as PDF

The Save as PDF option will save a copy of the current worksheet in a format that can be electronically distributed. This format is read only and does not allow any changes to be made after creation.

Select a view from the *Format* drop-down box and click on the **Save as PDF** button. A new window will appear with the PDF document displayed. Note: The Diagnostic Report format cannot be saved as a PDF.



Click the down arrow at the top of the new document window to save to your PC or other storage device.



**dashboard** 1 / 2

**North Orange Community College Degree Works**

**Disclaimer**  
You are encouraged to use this Degree Works Audit as a guide when planning your progress toward completion of certificate or degree requirements. This audit is not your academic transcript and it is not an official notification of completion of a certificate or degree. You are responsible for complying with all academic policies as published in the campus catalogs, any addendums, and all other requirements that may not be included in this Degree Works worksheet report. Please visit your campus Counseling Office to schedule an appointment for assistance in interpreting this report. You should contact the Admissions and Records Office for your official degree/certificate status or to obtain a copy of your academic transcript.

**Student View** AF066867 as of 12/29/2016 at 19:28

Student		Campus	Fullerton College
ID		Program	Associate in Arts
Gender	F	Major	FC - Chemistry AA Degree
Counselor		Catalog Year	2016-2017
Overall Credits	50.5	Overall GPA	3.168
Institution Credits	50.5	Other Institutions	CSU Fullerton Fullerton College Pinole Valley High
Transfer Credits	No Transfer Credits	Holds	No Holds

**Degree Progress**

Requirements 70%

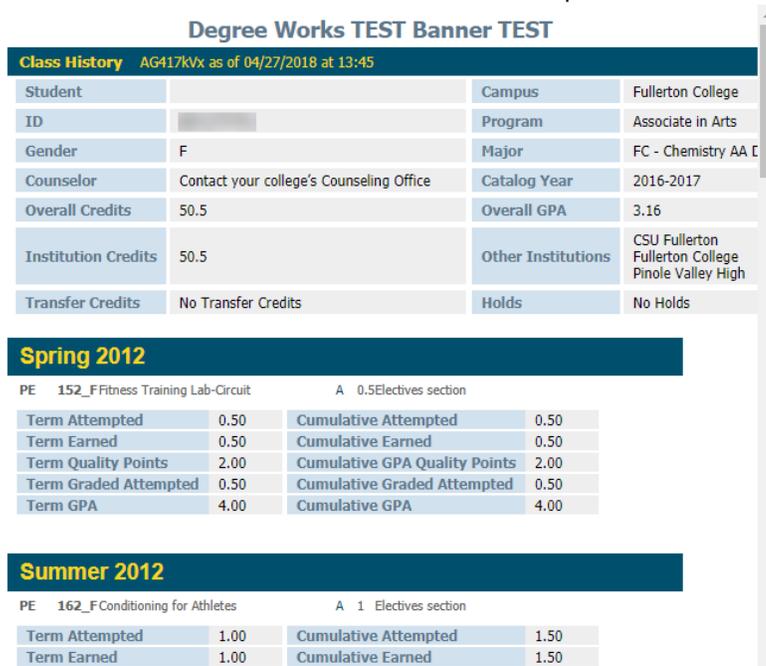
**FC Associate of Arts Degree** Catalog Year: 2016-2017 Major GPA: 3.168 Units Required: 9.5 Units Applied: 0

Unmet conditions for this set of requirements: 9.5 Units needed

- Minimum 2.0 GPA requirement Reason:
- DEGREE REQUIREMENTS +
- Fullerton GE Requirements Still Needed: See FC General Education section

## Class History

This option provides a compact list of academic history, including grades. It is useful for determining which classes the selected student has taken. It cannot be used in place of an unofficial transcript.



**Degree Works TEST Banner TEST**

**Class History** AG417kVx as of 04/27/2018 at 13:45

Student		Campus	Fullerton College
ID		Program	Associate in Arts
Gender	F	Major	FC - Chemistry AA Degree
Counselor	Contact your college's Counseling Office	Catalog Year	2016-2017
Overall Credits	50.5	Overall GPA	3.16
Institution Credits	50.5	Other Institutions	CSU Fullerton Fullerton College Pinole Valley High
Transfer Credits	No Transfer Credits	Holds	No Holds

**Spring 2012**

PE 152\_F Fitness Training Lab-Circuit A 0.5 Electives section

Term Attempted	0.50	Cumulative Attempted	0.50
Term Earned	0.50	Cumulative Earned	0.50
Term Quality Points	2.00	Cumulative GPA Quality Points	2.00
Term Graded Attempted	0.50	Cumulative Graded Attempted	0.50
Term GPA	4.00	Cumulative GPA	4.00

**Summer 2012**

PE 162\_F Conditioning for Athletes A 1 Electives section

Term Attempted	1.00	Cumulative Attempted	1.50
Term Earned	1.00	Cumulative Earned	1.50

## What If Scenarios

What If scenarios are used by students and counselors to explore academic goals that are different those currently declared. A What-If can be done on any program currently active at any of the campuses (FC, CC, NOCE). A What If does not change the declared program or any student information in any way.

Worksheets | Planner | Plans | Notes | Petitions | GPA Calc

Worksheets | **What If** | Look Ahead

Format: Student View | Process What-If | Save as PDF

**Select your primary area of study**

Catalog Year: 2016-2017 | Program: FC - AA Chemistry | Major: FC - Chemistry AA Degree | Campus: Fullerton College | Degree: Associate in Arts | GE Pattern: (pick a GE Pattern)

**Select your additional areas of study**

GE Pattern: (pick a GE Pattern) | Add | Chosen Areas of study | Remove

**Choose Your Future Classes**

Enter a course and click Add Course | Courses you are considering

Subject: |

Above is the What If audit screen, which allows for an audit to be performed on the selected changes to the student's academic goals. The audit will display how the selection(s) affect the student's progress, applicable classes to the new degree, classes that will not count, and new classes necessary.

Follow these steps to start a What If audit:

1. Click on the **What If** link in the Worksheets tab to display the *What If* audit screen.
2. Select the desired changes in the available criteria for the *Select your primary area of study* section
3. If necessary, select the desired change for *Select your additional areas of study* section
4. If necessary, add any courses being considered for a future term in the *Choose your future classes* section
5. After selecting the changes, click the **Process What If** button to view the new requirements for the student or the **Save as PDF** button to view the audit and save (see previous Save as PDF section)

Name | Degree: AA | Major: FC - Chemistry AA Degre | Campus: 2 | Last Audit: 04/27/2018 | Last Refresh: Today at 3:40 pm

Planner | Plans | Notes | Petitions | GPA Calc

Back | Selected What-If Items: | Look Ahead Courses Used: |

**Disclaimer**  
You are encouraged completion of a cert worksheet report. obtain a copy of you

Selected What-If Items:  
Campus: Fullerton College  
Degree: Associate in Arts  
Catalog Year: 2016-2017  
-----  
Major: FC - Physical Education AA Degree  
Program: FC - AA Physical Education  
-----

**Degree Works TEST Banner**

**Student View** WA0234bB as of 04/30/2018 at 15:40

Student		Campus
ID		Program
Gender	F	Major
Counselor	Contact your college's Counseling Office	Catalog Year
Overall Credits	50.5	Overall GPA

To view another What If scenario, click the **Back** button and restart the process.

## Look Ahead

The Look Ahead feature will display an audit showing courses a student plans to register for and complete in future terms.

Follow the steps below to generate a Look Ahead audit:

1. Click on the **Look Ahead** link located above the *Legend* section on the left side of the page
2. Select the appropriate format to display (default is *Student View*)
3. Enter the subject short name in the *Subject* field and the course number in the *Number* field
4. Click the **Add Course** button. The course name will appear in the *Courses you are considering* column.

5. Repeat Step 4 for all courses to be included in the Look Ahead audit
6. To remove a course entered, highlight the course in the right column and click the *Remove Course* button
7. When all courses for the Look Ahead audit are entered, click the **Process New** to start the process

8. The results of the Look Ahead (Student Display) audit will display showing the planned courses and the requirements satisfied (outlined in red) toward the student's degree/program completion.

FC Additional Requirements						Catalog Year: 2016-2017
						GPA: 4.00
<input checked="" type="checkbox"/> PHYSICAL EDUCATION REQUIREMENT						
<input checked="" type="checkbox"/> Select a minimum of 1 Unit from the Following	PE 204_F	Basketball - Women	A	2.00	Spring 2013	
<input checked="" type="checkbox"/> MULTICULTURAL REQUIREMENT						
<input checked="" type="checkbox"/> Select 1 Course from the Following	ANTH 102_F	Cultural Anthropology	A	3.00	Fall 2012	
<input checked="" type="checkbox"/> READING REQUIREMENT						
<input checked="" type="checkbox"/> Select 1 Course from the Following	ENGL 103_F	Critical Reasoning and Writing	PLAN	(4.00)	Planned Term	
FC Chemistry Major A						Catalog Year: 2016-2017
						Units Required: 18.00
						GPA: 0.00
						Units Applied: 5.00
Unmet conditions for this set of requirements: 13 Units needed						
A C grade or better is required in all courses.						
<input type="checkbox"/> REQUIRED COURSES						
<input checked="" type="checkbox"/> General Chemistry I	CHEM 111AF	General Chemistry I	PLAN	(5.00)	Planned Term	
<input type="checkbox"/> General Chemistry II	Still Needed: 5.00 Units in CHEM 111BF*					

9. To perform another Look Ahead audit, click the **Back** button located at the top of the report

Note: If a subject name and/or course number is not valid, a note will display at the bottom of the Look Ahead audit (see example below).

Not Applicable To Degree						Units Applied: 0.00	Classes Applied: 1
ENGL 103	-Course not found in system-	Invalid course	PLAN	0.00	Planned Term		

## Planner Tab

The new version of Degree Works transitions to a different method of creating and managing student plans. The older method using the *Planner* tab is now in a *Read Only* mode (see screenshot below). This tab will display the current student plan (if any) in several non-editable views. Please use the *Plan* tab to create/edit student plans moving forward.

Find  Student ID  Name  Degree  Major  Campus  Last Audit  Last Refresh

AS-T FC - Physics AS-T Degree 2 01/25/2018 01/25/2018 at 1:06 am

Worksheets
**Planner**
Plans
Notes
Petitions
GPA Calc

Student

Notes Mode  Show completed classes

**Student Educational Planner**

Calendar Mode  
Planned vs. Taken

Print

Student	
Current Term	Spring 2018
Description	
Catalog Year	2017-2018
Active/Inactive	Active Plan
Locking Status	Plan is locked
Last Modified	01/29/2018

Spring 2018	
Course	Units
-AREA A2	3
-AREA B4	3
	0
	0
	0
	0
	0
	0
	0
	0
<b>Total</b>	<b>6</b>

<b>Plan Total</b>	<b>6</b>
-------------------	----------

## Plans Tab

The Plans tool is used to create a Student Educational Plan (SEP) with a student. Using the Plans tool, a student or counselor can create an academic plan for the course of study. Once a plan is established, an audit can be generated to evaluate degree progress of the student.

Click on the **Plans** tab at the main student screen to access the Plans tool. If an active SEP exists, the plan will display automatically as the default view.

The screenshot shows the 'Student Planner' interface. At the top, there are search fields for Student ID, Name, Degree (AS-T), Major (FC - Physics ASF Degree), Campus (2), Last Audit (01/25/2018), and Last Refresh (01/25/2018 at 1:06 am). Below these are tabs for Worksheets, Planner, Plans, Notes, Petitions, and GPA Calc. The main area is titled 'Student Planner for: [Student Name]' and includes a 'View: Edit' dropdown, 'View Plan List', and 'New Plan' buttons. The plan details show: Description (empty), Active and Locked checkboxes, Degree (Associate in Science Transfer), Level (Fullerton College), Tracking Status (Not Tracked), and Plan Type (Abbreviated Plan). A table lists requirements for Summer 2018 (Total Units: 7.0) and Fall 2018 (Total Units: 10.0). The Summer 2018 table has columns for Tracking, Critical, Course Requirement, Units, Minimum Grade, Delivery, and Notes. It lists three requirements: ENGL 100\_F (4.0 units), ECON 101HF (3.0 units), and AC/R 100\_C (3.0 units). The Fall 2018 table has columns for Tracking, Critical, Choice Requirement, Minimum Units, Minimum Grade, Delivery, and Notes, listing one requirement: @ANY AREA\_2B. A disclaimer at the bottom states: 'Disclaimer: You are encouraged to use this degree plan as a guide for tracking your progress toward completion of the above requirements. Your academic advisor or the Registrar's Office may be contacted for assistance in interpreting this report. This plan is not your academic transcript and it is not official notification of completion of degree or certificate requirements. Please contact the Registrar's Office regarding this degree plan, your official degree/certificate completion status, or to obtain a copy of your academic transcript.' At the bottom right, there are buttons for 'Create Block', 'Audit', 'What-If', 'Save As...', and 'Save'.

## Plan List

The Plan List displays all plans created for the student, regardless of degree, school, or status. Plans can be sorted by clicking on the double arrow in each column header.

To view the Plan List click the **View Plan List** button located above the Student Planner heading to the right.

The screenshot shows the 'Student Planner' interface with the 'View Plan List' button selected. The main area is titled 'List of plans' and includes a 'View: Select' dropdown, 'New Plan', and 'Delete' buttons. A table lists three plans with columns for Description, Active, Modified, Who, Degree, Level, and Status. The table data is as follows:

Description:	Active	Modified	Who	Degree:	Level:	Status:
862-04032018-TQUACH	Y	05/09/2018	Quach, Tony	AS-T	2	LOCKED
862-04182018-TQUACH	N	05/05/2018	Quach, Tony	AS-T	2	LOCKED
862-05052018-TQUACH	N	05/05/2018	Quach, Tony	AS-T	2	LOCKED

To view a listed plan, click to highlight a plan and select an option from the *View* drop-down menu. If none of view options is necessary, double-click a listed plan to display the default view.

The screenshot shows the 'Student Planner' interface with the 'View Plan List' button selected. The main area is titled 'List of plans' and includes a 'View: Select' dropdown, 'New Plan', and 'Delete' buttons. A table lists three plans with columns for Description, Active, Modified, Who, Degree, Level, and Status. The table data is as follows:

Description:	Active	Modified	Who	Degree:	Level:	Status:
862-04032018-TQUACH	Y	05/09/2018	Quach, Tony	AS-T	2	LOCKED
862-04182018-TQUACH	N	05/05/2018	Quach, Tony	AS-T	2	LOCKED
862-05052018-TQUACH	N	05/05/2018	Quach, Tony	AS-T	2	LOCKED

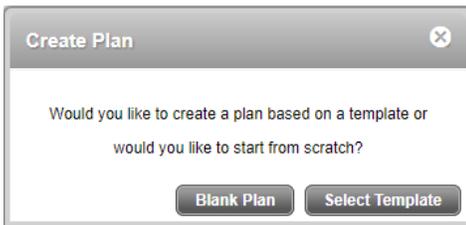
The 'View: Select' dropdown menu is open, showing options: Select, Audit, Calendar, Edit, and Notes.

To add a new plan, click the **New Plan** button. Please note that any existing plans for a student cannot be removed.

**Important:** Do not edit any existing student plan. Instead, create a new plan with the changes and replace. Refer to the *Save Plan* and *Active/Locked Plan* sections appearing later in the user guide for more detailed information.

## Creating a Plan

If no plans available for the selected student or wishing to create an additional plan, a message will display prompting the user to select a plan choice.

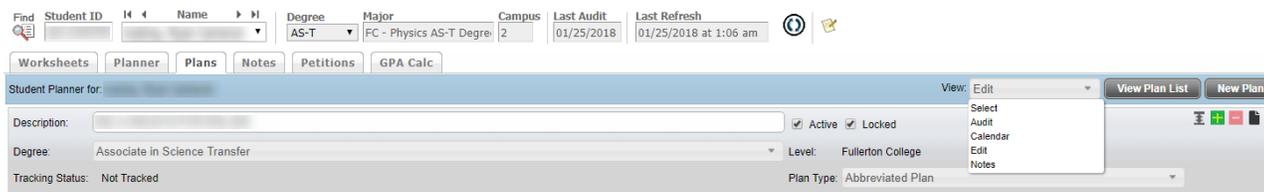


Click the **Blank Plan** button to start the process.

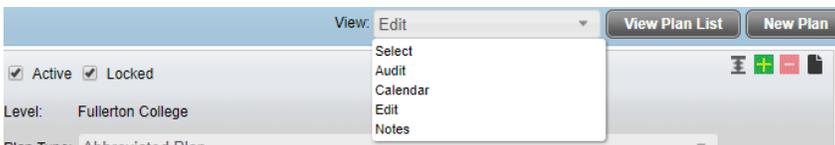
Note: As of this user guide version, templates are not available yet. All new/additional plans must be created from scratch.

## Student Planner Information

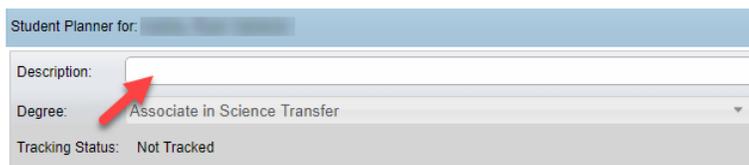
The first section that appears is Student Planner Information.



The default view upon starting a new plan is *Edit*. The other options, complete with different appearances, will be addressed later in the user guide.



1. Use the Degree Works applet (see next section) to generate the appropriate text to be copy/pasted into the Description field.



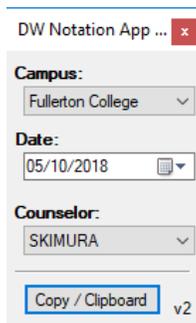
2. Check the *Locked* checkbox.
3. Check the *Active* checkbox at counselor discretion on whether the plan is intended to be followed  
Note: Only one plan can be designated as Active.
4. Select the appropriate plan option in the *Plan Type* drop-down box



Important: A *Comprehensive Plan* must include all of the coursework and terms needed for a student to complete his/her program AND be at least two terms in length.

## Degree Works Applet

To ensure consistency in the SEP Description, Degree Works Applet to generate the proper description based on date and counselor name. Note that the applet is campus specific, so check and make sure the proper one is being used. If necessary, contact your campus SSSP office to obtain the applet and install directions.



DW Notation App ... x

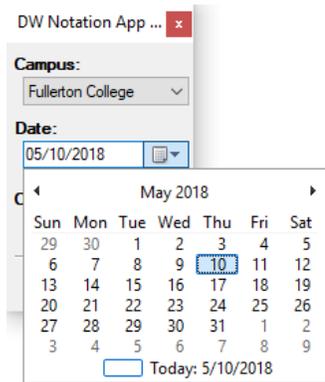
**Campus:**  
Fullerton College v

**Date:**  
05/10/2018 [calendar icon] v

**Counselor:**  
SKIMURA v

Copy / Clipboard v2

1. Launch the Degree Works applet (titled DW Notation Applet)
2. The *Date* field should be set to the current date. If another date is desired click on the calendar icon to the right of the listed date and set.



DW Notation App ... x

**Campus:**  
Fullerton College v

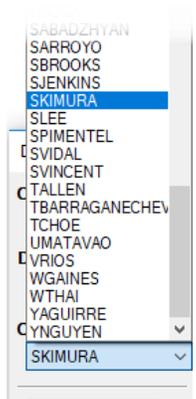
**Date:**  
05/10/2018 [calendar icon] v

May 2018

Sun	Mon	Tue	Wed	Thu	Fri	Sat
29	30	1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	31	1	2
3	4	5	6	7	8	9

Today: 5/10/2018

3. Find and select your name in the *Counselor* drop-down list box.



SABADZHYAN  
SARROYO  
SBROOKS  
SJENKINS  
SKIMURA  
SLEE  
SPIMENTEL  
SVIDAL  
SVINCENT  
TALLEN  
TBARRAGANECHEV  
TCHOE  
UMATAVAO  
VRIOS  
WGAINES  
WTHAI  
YAGUIRRE  
YNGUYEN  
SKIMURA

4. Click the **Copy/Clipboard** button at the bottom of the applet
5. Click the *Description* field in the plan and press CTRL-V on your keyboard to paste the generated description

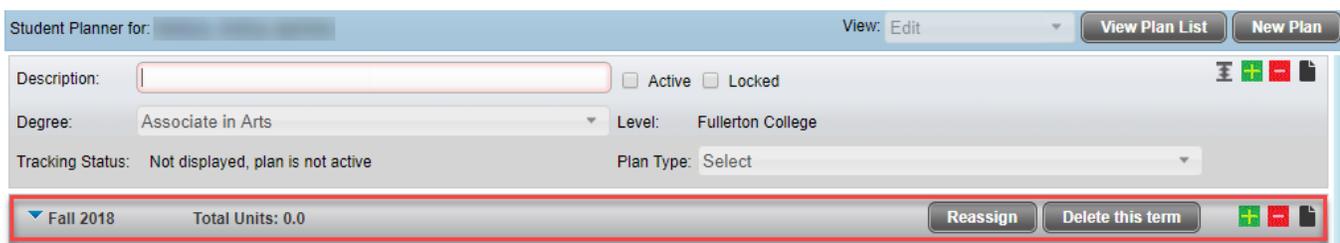
**Note:** The applet is programmed to be “on-top” while active, which means it will always be visible regardless of other applications or documents that are currently displayed. To exit, click the red X button at the top of the applet.

## Add New Term

To add a new term, click the green + button at the top right of the *Student Planner Information* section. Choose the desired term from the *Add Term* list that appears.

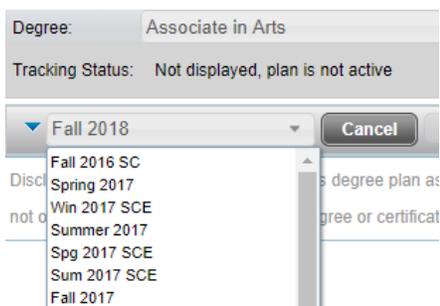


Once selected, a new section will appear in the plan with the chosen term in the header.



Options in the new term section header:

- Expand/collapse the term course list by clicking the blue arrow appearing to the left of the term name.
- To change the term, click on the **Reassign** button and choose from the list appearing underneath the term name on the left side



- To delete the term section (and all contents within), click the **Delete this term** button and confirm

## Add Term Requirement

To add a requirement to a term, click the green + button in the term header. Choose the desired requirement from the *Add Requirement* list that appears.



## Choice Requirement

This plan item is used where a group of courses can satisfy a single requirement. There are two types of Choice requirements supported, standard and free form.

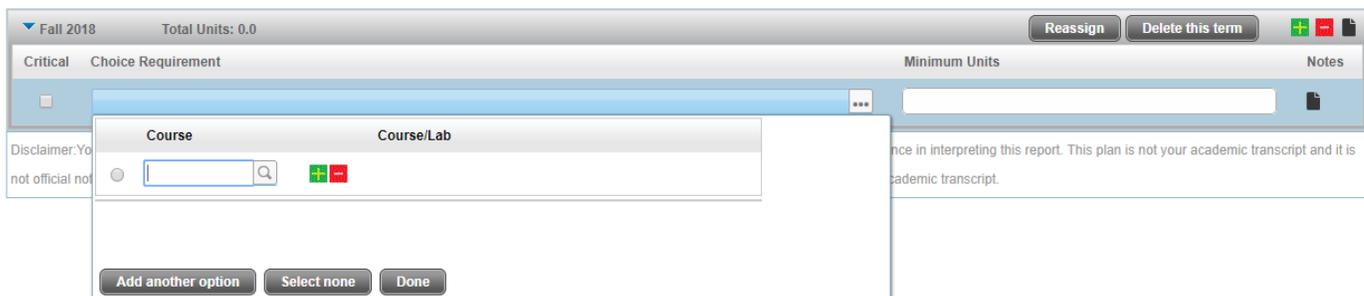
### Standard

Select this type if there are a limited number of specific courses necessary to satisfy a requirement. For a broad category of courses within a subject or category eligible to satisfy a requirement, use the Free Form type (see next section).

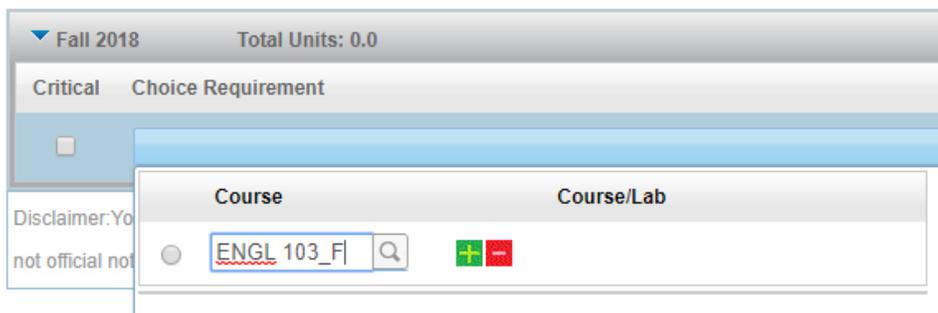
1. Select the **Choice** option if there is more than one course that can fulfill the requirement



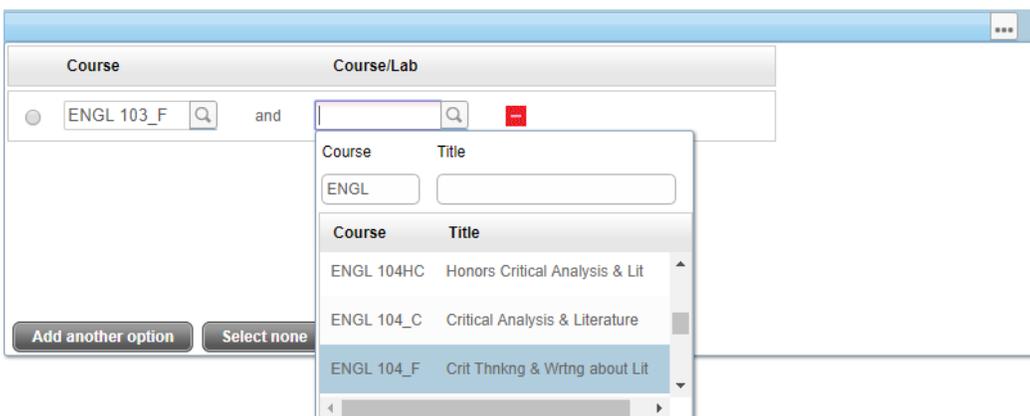
2. Click on the ellipses button (...) to display the course selector



3. Type in the name of the course (Example: ENGL 103\_F)



To search for a course, click the magnifying glass to the right of the *Course* entry field. Begin entering the course name until a search results list appears. Scroll through the list and select the desired course to add.

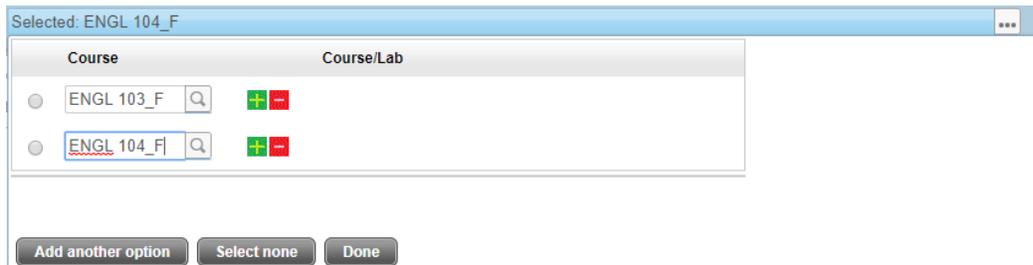


At this point, there are two options to satisfy different requirement combinations:

- Click the **Add another option** button to add another course that can satisfy requirements (Step 4) or
- Click the green + button to pair with another course in order to satisfy requirements (Step 5)

4. To create a choice where multiple courses can satisfy a requirement, follow these steps:

- a. Click the **Add another option** button
- b. A new *Course* entry field will appear. Type the course name in the entry field



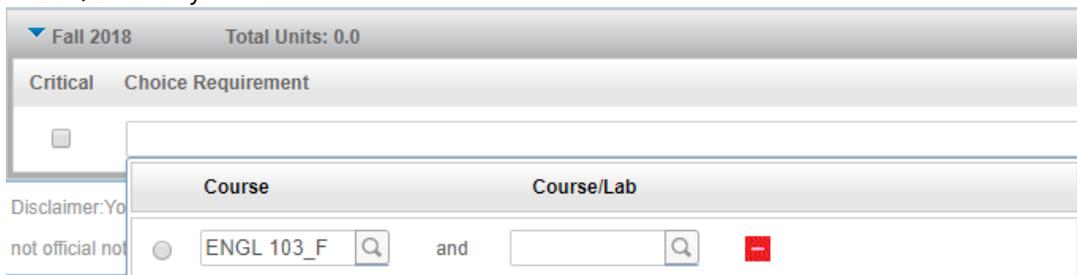
- c. If there are more courses to add, follow steps a and b
- d. Click the red – button beside a course to remove from the requirement
- e. Click the **Done** button to view the entire choice requirement



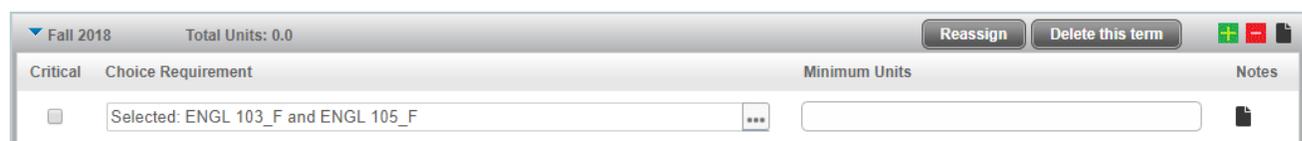
f. If the choice requirements needs more editing, click the ellipses button (...) and repeat Steps 3-4 as necessary.

5. To create a choice where a course paired with another will satisfy a requirement, follow these steps:

- a. Click the green + button next to the course entry field. Note the requirement adds an AND connector and *Course/Lab* entry field.



- b. Enter a course name in the *Course/Lab* entry field
- c. If another course or combination of courses can satisfy the requirement, click the **Add another option** and repeat Steps 3-5 as necessary.
- d. Click the **Done** button to view the entire choice requirement.



e. If the choice requirements needs more editing, click the ellipses (...) button and repeat Steps 3-5 as necessary.

6. Type in the appropriate value in the *Minimum Units* entry field
7. If any additional details are necessary for the choice requirement, click the **Notes** button to attach

### Free Form

The Free Form type is used to identify a set of courses within a subject or category that satisfies a single requirement.

1. Click on the green + button located at the top right of the Term heading and select the **Choice** option
2. When the *Choice Requirement* item is added, click on the *Choice Requirement* field to display the entry box.

3. Enter the Free Form text in the *Course* field in the following format:
  - a. Start by typing the @ symbol
  - b. Type the first phrase after the @ symbol (no space) in upper case
  - c. Type a space and then the second phrase in upper case

Other examples: @ANY PE\_COURSE, @AREA B1\_CSUGE

4. Click the **Done** button at the bottom of the entry box
5. The Free Form text will appear in the *Course Requirement* field. Note that courses entered in this manner will not appear in the audit section of the plan.

## Add Course Requirement

To add a course requirement to a term, use one of two entry methods: Manual or from Course List

### Manual Entry

1. Click the green + button in the term header and select the **Course** option from the *Add Requirement* list that appears.

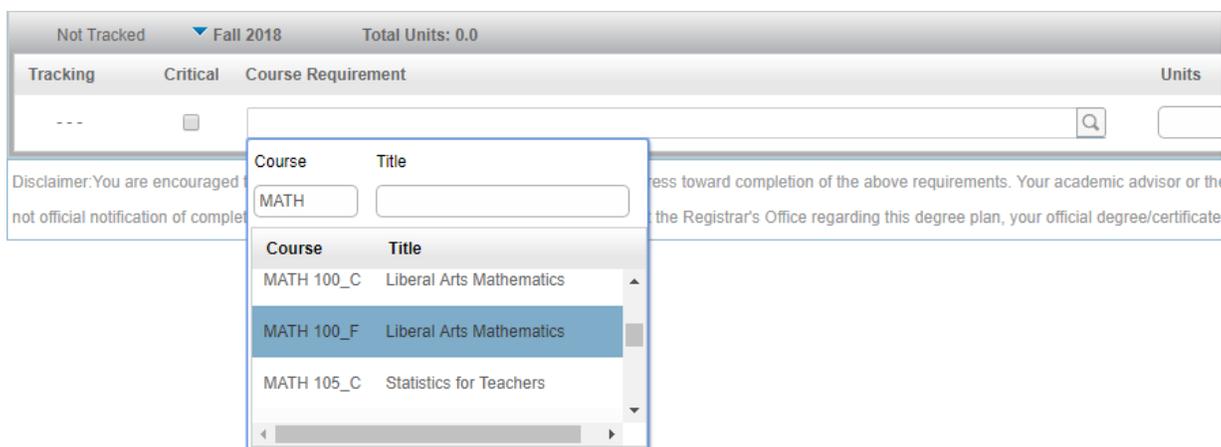


The screenshot shows a form for adding a course requirement. At the top, it displays 'Not Tracked', 'Fall 2018', and 'Total Units: 0.0'. There are buttons for 'Reassign' and 'Delete this term'. Below this, there are tabs for 'Tracking', 'Critical', and 'Course Requirement'. The 'Course Requirement' field is empty, and there is a search icon. The 'Units' field is also empty.

2. Type the name of the course in the *Course Requirement* field

**Note:** The course name contains up to four letters. The course number is five characters in length, so can appear in several formats, such as 100\_F or 110AC. The course name and number are separated by a space. No other place within the course name can contain a space. Additional spaces are represented by underscore characters.

3. The course unit value will appear in the *Values* field with the next action performed
4. If there are any comments to add regarding the course requirement, click the *Notes* icon and enter them there.
5. If a search is necessary for the course name, click on the magnifying glass icon to display the search box. Begin typing in the course name in either the *Course* or *Title* fields until a search results list appears. Scroll through the search results list and select the desired course.



The screenshot shows the same form as above, but with a search results dropdown menu open. The dropdown menu has two columns: 'Course' and 'Title'. The first row is 'MATH 100\_C Liberal Arts Mathematics'. The second row is 'MATH 100\_F Liberal Arts Mathematics' and is highlighted. The third row is 'MATH 105\_C Statistics for Teachers'. The 'Course Requirement' field contains 'MATH' and the 'Units' field is empty.

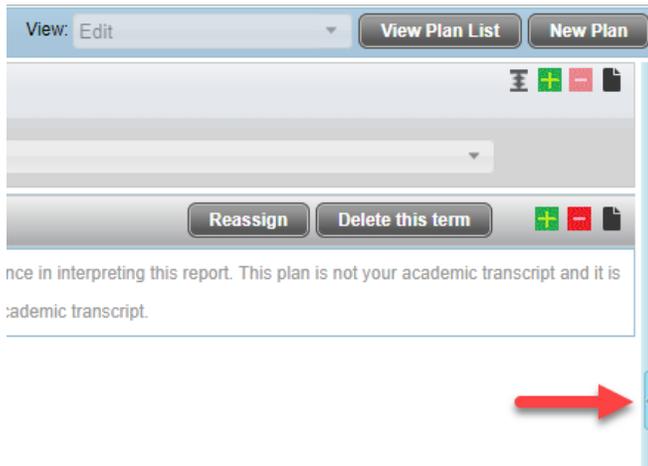
The selected course and units will appear in the respective fields



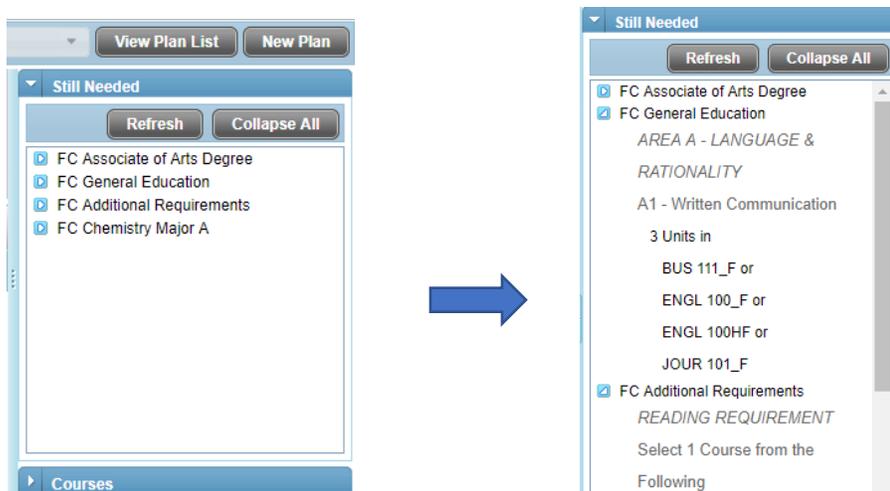
The screenshot shows the form with the selected course and units. The 'Course Requirement' field now contains 'MATH 100\_F' and the 'Units' field contains '3.0'. The 'Notes' icon is visible on the right.

## Course List Entry

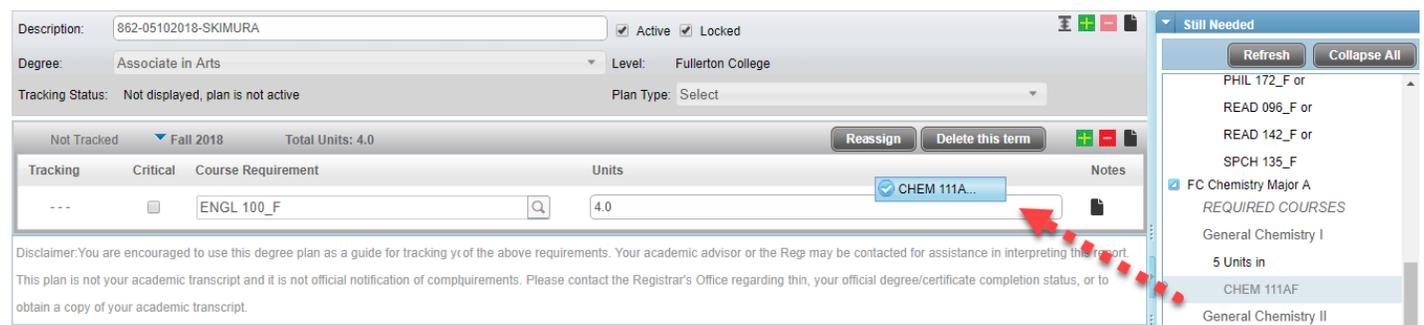
1. Click on the blue slider that appears in the scrollbar on the right side of the page. Look carefully, as it can easily be mistaken as the page slide bar.



2. Once clicked, a fly-out list box will appear displaying a list of courses divided into two categories: *Still Needed* (for academic progress) or *Courses* (all other available courses).
3. Clicking the blue buttons beside a category/sub-category will expand/hide the eligible courses.



4. Find the desired course to add. Drag and drop into the term heading or within the area
5. The dragged course will appear at the bottom of the course list in the selected term



**Note:** The course list box can be displayed at any time in the new plan worksheet for reference. However, the drag-and-drop operation can only perform an *Add Requirement* action.

## Add Placeholder Requirement

A placeholder can be added to the term to designate a comment or item outside of the *Course* or *Choice* requirement. Click the green + button in the term header and select the **Placeholder** option from the *Add Requirement* list.

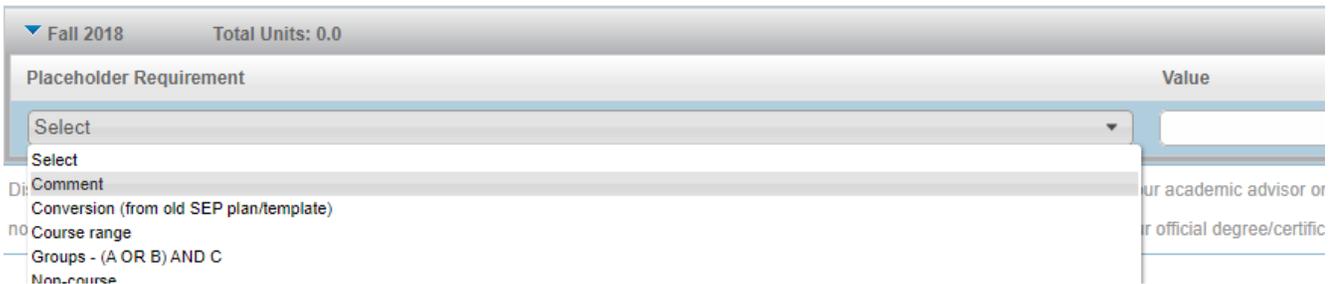


Fall 2018 Total Units: 0.0

Placeholder Requirement Value Notes

Select

Click on the Select drop-down to display a list of available items.



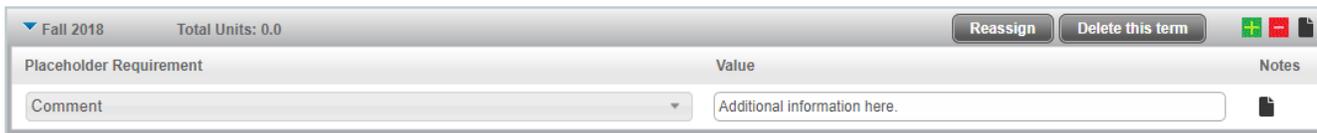
Fall 2018 Total Units: 0.0

Placeholder Requirement Value

Select

- Select
- Comment
- Conversion (from old SEP plan/template)
- Course range
- Groups - (A OR B) AND C
- Non-course

Selected item will display in the *Placeholder Requirement* field. Enter any additional information in the *Value* field.



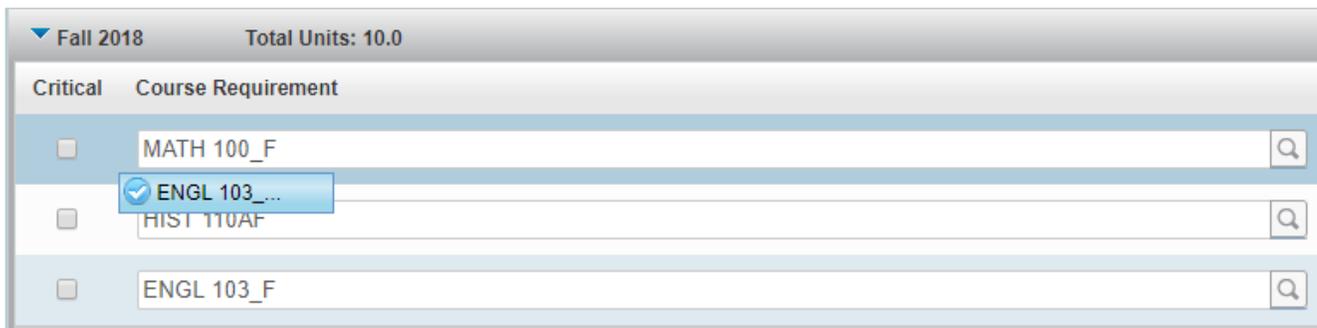
Fall 2018 Total Units: 0.0

Placeholder Requirement Value Notes

Comment Additional information here.

## Moving Items

Items in a plan can be moved to a different location within the plan using the drag and drop method.



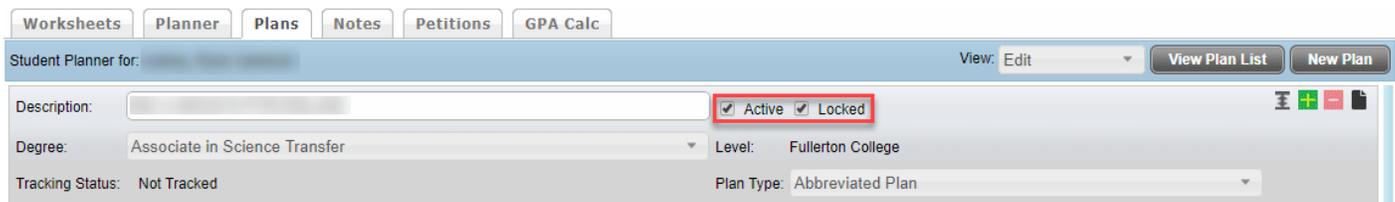
Fall 2018 Total Units: 10.0

Critical Course Requirement

- MATH 100\_F
- ENGL 103\_...
- HIST 110AF
- ENGL 103\_F

## Locked/Active Plan

All plans created by a counselor must be locked to prevent additional edits by the student. To lock a plan check the **Locked** option. Check the **Active** option at counselor discretion if the plan will be followed moving forward.



Worksheets Planner Plans Notes Petitions GPA Calc

Student Planner for: [Name]

View: Edit View Plan List New Plan

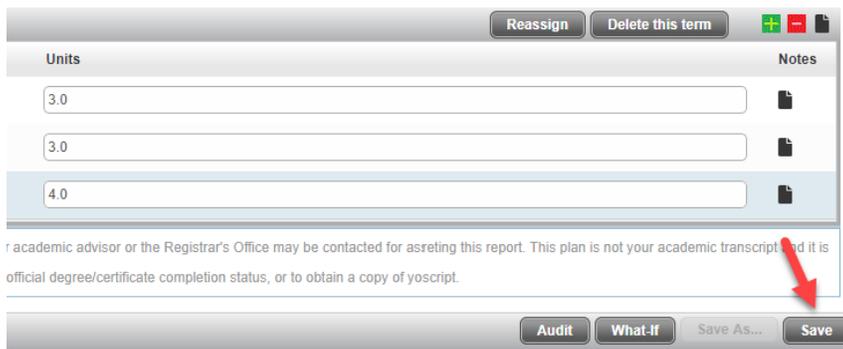
Description: [Field]  Active  Locked

Degree: Associate in Science Transfer Level: Fullerton College

Tracking Status: Not Tracked Plan Type: Abbreviated Plan

## Saving a Plan

To save a plan, click on the Save button in the lower right corner of the page. Plans can be saved at any time and will then show in the list of existing plans for a student. Click on the View Plan List button to view all saved plans for the student.



The screenshot shows a web interface for creating a plan. At the top, there are buttons for 'Reassign', 'Delete this term', and a plus sign icon. Below these are three input fields for 'Units' with values 3.0, 3.0, and 4.0. To the right of each field is a 'Notes' icon. At the bottom, there are buttons for 'Audit', 'What-If', 'Save As...', and 'Save'. A red arrow points to the 'Save' button. A warning message is visible: 'For an academic advisor or the Registrar's Office may be contacted for ascertaining this report. This plan is not your academic transcript and it is not an official degree/certificate completion status, or to obtain a copy of your transcript.'

If another active plan exists for the student, a message box will appear stating that the new plan can only be saved in an inactive state (*Active* checkbox is unchecked).



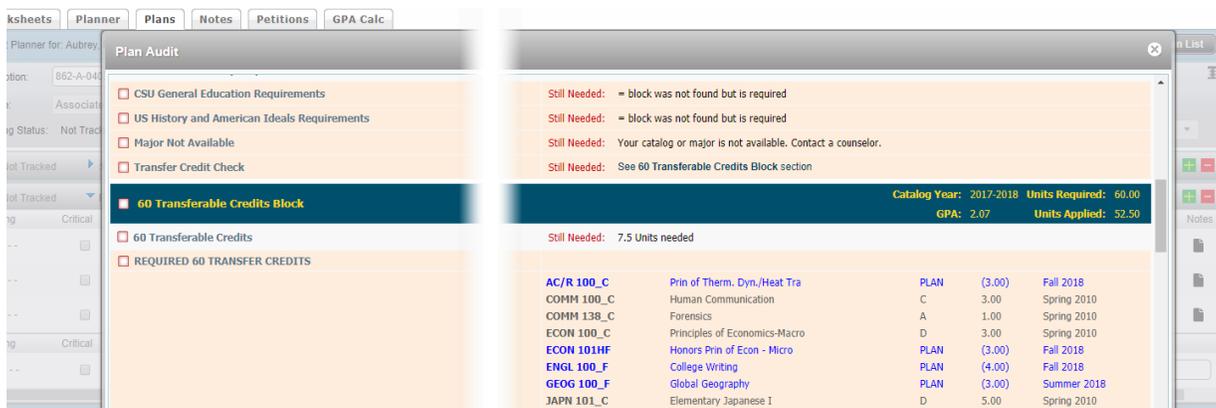
The dialog box is titled 'Confirm Save' and contains the following text: 'Another plan marked as active already exists. If you click Yes the plan you are trying to save will be flagged as inactive. Do you want to continue?'. There are 'Cancel' and 'Yes' buttons at the bottom.

In this instance, deactivate (uncheck *Active* option) the current active plan first before saving the new plan as active.

## View Audit

Click the **Audit** button at the bottom of the Plan to view the planned courses in the student's current program. This is a great way of "closing the loop". The students can view all planned courses and a plan to follow to reach their goal.

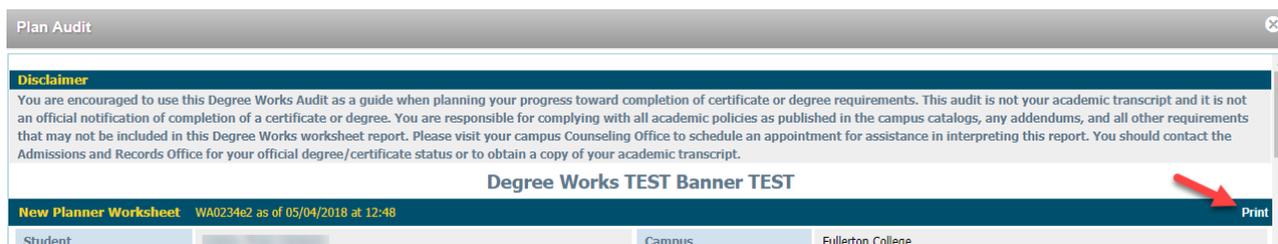
All planned courses are indicated in the audit with 'PLAN', as well as the unit value and planned term.



The screenshot shows the 'Plan Audit' report for a student. It includes a list of requirements on the left and a table of planned courses on the right. The requirements list includes '60 Transferable Credits Block' and '60 Transferable Credits'. The planned courses table is as follows:

Course	Description	Grade	Units	Term
AC/R 100_C	Prin of Therm. Dyn./Heat Tra	PLAN	(3.00)	Fall 2018
COHM 100_C	Human Communication	C	3.00	Spring 2010
COHM 138_C	Forensics	A	1.00	Spring 2010
ECON 100_C	Principles of Economics-Macro	D	3.00	Spring 2010
ECON 101HF	Honors Prin of Econ - Micro	PLAN	(3.00)	Fall 2018
ENGL 100_F	College Writing	PLAN	(4.00)	Fall 2018
GEOG 100_F	Global Geography	PLAN	(3.00)	Summer 2018
JAPN 101_C	Elementary Japanese I	D	5.00	Spring 2010

The audit can be printed by clicking the Print link near the top right of the report.



The screenshot shows the 'Plan Audit' report with a 'Print' button highlighted by a red arrow. The report includes a disclaimer and a 'Degree Works TEST Banner TEST' section. The footer shows 'New Planner Worksheet WA0234e2 as of 05/04/2018 at 12:48' and 'Student' information.

## Calendar View

A student's plan can be viewed in the *Edit* (enter and make changes to a plan) or the *Calendar* view. The *Calendar* view displays a created plan organized by year and semester. Click the **View** drop-down box and select the *Calendar* option.

View: **Edit** (dropdown menu open with options: Select, Audit, **Calendar**, Edit, Notes)

View Plan List New Plan

Student Planner for: [Name] View: **Calendar** View Plan List New Plan

Degree: Associate in Science Transfer Active: Yes  
Level: Fullerton College Status: LOCKED  
Tracking Status: Not Tracked

**2017-2018**

Not Tracked	Summer 2018, Total Units: 7.0
---	MATH 120_F 4.0
---	GEOG 100_F 3.0

**2018-2019**

Not Tracked	Fall 2018, Total Units: 10.0
---	ENGL 100_F 4.0

Audit Print

Note: Comments entered in the *Edit* view do not appear in the *Calendar* view.

Hover the mouse pointer over a course name to display the full course title.

To print from the *Calendar* view, click the **Print** button in the lower right corner of the page.

## Notes View

The *Notes* view will display a student's plan in a list format with any notes and placeholder comments associated with each term and course. Notes and comments are added in the *Edit* view. The notes and placeholder comments can be toggled between hidden or shown by clicking the **Hide all notes** or **Show all notes** button.

Student Planner for: [Name] View: **Notes** View Plan List New Plan

Degree: Associate in Science Transfer Active: Yes  
Level: Fullerton College Status: NOT LOCKED

Hide all notes

Testing 1 2 3. Are you seeing this note?

Summer 2018, Total Units: 7.0
This is a test note. This is only a test.

Critical	Course Requirement	Credits	Notes
	MATH 120 F	4.0	

Last updated by: [Name] Audit Print

## Audit View

The *Audit* view combines the *Calendar* view and the Planner worksheet on the same page. Use this view after creating a plan in Edit view.

The screenshot shows the 'Student Planner for' interface in 'Audit' view. On the left, a 'New Planner Worksheet' section displays student information: Student ID, Level (Fullerton College), Degree (Associate in Science Transfer), Classification (Freshman), College (Fullerton College), Advisor, Major (FC - Physics AS-T Degree), Overall GPA (0.00), and Minor. Below this is a 'Degree Progress' bar for 'Requirements' at 47%. A section for 'FC Associate of Science-Transfer Degree' shows 'Catalog Year: 2017-2018' and 'GPA: 1.79'. It lists requirements: 'Minimum 2.0 GPA requirement' (Still Needed: Your current GPA in these classes is 1.79), 'Minimum Residency Requirement of 12 Units' (checked), and 'CSU General Education Requirements' (unchecked). A note states 'Still Needed: OTHER = ECCE/SILC block was not found but is required'. On the right, the 'View: Audit' section shows 'Active: Yes', 'Status: LOCKED', and 'Tracking Status: Not Tracked'. Below are two course lists: '2017-2018 Summer 2018, Total Units: 7.0' with 'MATH 120\_F' (4.0) and 'GEOG 100\_F' (3.0); and '2018-2019 Fall 2018, Total'.

The *Calendar* area of the *Audit* view allows listed courses to be relocated among the available terms by drag-and-drop.

The diagram illustrates the drag-and-drop functionality. It shows two course lists. The top list is for '2017-2018 Summer 2018, Total Units: 7.0' and contains 'MATH 120\_F' (4.0) and 'Honors Intro Probability/Statist' (4.0). The bottom list is for '2018-2019 Fall 2018, Total Units: 10.0' and contains 'ENGL 100\_F' (4.0), 'MATH 120\_F' (4.0), and 'ECON 101HF' (3.0). A blue dashed arrow points from the 'MATH 120\_F' course in the 2017-2018 list to the 'MATH 120\_F' course in the 2018-2019 list, demonstrating the relocation of a course between terms.

## Notes Tab

The *Notes* tab is used to enter general notes on the student whereas notes added in the *Edit* view are specific to a plan, term, or course.

Find Student ID Name Degree Major Campus Last Audit Last Refresh

AS-T FC - Physics AS-T Degree 2 01/25/2018 01/25/2018 at 1:06 am

Worksheets Planner Plans Notes Petitions GPA Calc

View Notes

Add Note

Modify Notes

Delete Notes

**View Notes: Please be aware that all notes are subject to FERPA regulations**

Internal	Note Text	Created By	Create Date
<input type="checkbox"/>	Student transferring here from Cypress. Will attend p/t for first semester. Called assessment center. He will take math and Engl tests here, and take math and English this semester. Physics major transferring to CSUF or CSULB.	Skiles, Pamela J	01/29/2018

Click the **Add Note** link to add a note on the student. Choose a predefined note or type a custom note in the space provided. Click the **Save Note** button when finished.

Worksheets Planner Plans Notes Petitions GPA Calc

View Notes

Add Note

Modify Notes

Delete Notes

**Add New Note: Please be aware that all notes are subject to FERPA regulations**

Enter your note and click the Save Note button

Not available to student

Choose a predefined note from the list below

Save Note Clear

To modify a saved note, click on the **Modify Notes** link and make edits within the text box containing the note. Click the paper/pencil icon to save the newly edited note. A message will appear to confirm edits are saved.

Worksheets Planner Plans Notes Petitions GPA Calc

View Notes

Add Note

Modify Notes

Delete Notes

**Modify Notes: Please be aware that all notes are subject to FERPA regulations**

Internal	Note Text	Created By	Create Date
<input type="checkbox"/>	Student transferring here from Cypress. Will attend p/t for first semester. Called assessment center. He will take math and Engl tests here, and take math and English this semester. Physics major	Skiles, Pamela J	01/29/2018

To delete a saved note, click on the **Delete Notes** link. Find the note to delete and click on the paper/pencil icon. A message will appear to confirm the note deletion.

Note: Saved notes in a student plan can only be deleted by the original author.

**Delete Notes: Please be aware that all notes are subject to FERPA regulations**

Internal	Note Text	Created By	Create Date
<input type="checkbox"/>	Student transferring here from Cypress. Will attend p/t for first semester. Called assessment center. He will take math and Engl tests here, and take math and English this semester. Physics major transferring to CSUF or CSULB.	Skiles, Pamela J	01/29/2018

## Petitions Tab

The Petitions tab will list all student petitions for changes in a plan. Petitions can be added, modified, or deleted from the student record as needed.

The screenshot shows the top navigation bar with tabs for Worksheets, Planner, Plans, Notes, Petitions, and GPA Calc. The Petitions tab is active. Below the navigation bar, there is a sidebar with links for View Petitions, Add Petition, Modify Petitions, and Delete Petitions. The main content area displays a summary of petition counts:

- View Petitions for Exceptions**
- No Petitions Awaiting Approval
- No Petitions Approved
- No Petitions Applied as Exceptions
- No Petitions Rejected

Click the **Add Petition** link to add a new student petition. Provide details on the petition in the space provided and click **Submit Petition** when finished.

The screenshot shows the 'Add New Petition for Exception' form. The sidebar has 'Add Petition' selected. The main content area has a heading 'Add New Petition for Exception' and a sub-heading 'Enter a description and click the Submit Petition button'. There is a large text input field for the description and a 'Submit Petition' button at the bottom.

To modify an existing petition waiting for approval, click on the **Modify Petition** link and make edits within the text box containing the petition. Click the paper/pencil icon to save the newly edited petition. A message will appear to confirm edits are saved.

The screenshot shows the 'Modify Petitions for Exceptions' interface. The sidebar has 'Modify Petitions' selected. The main content area displays a table of petitions:

Petitions Awaiting Approval			
Description	Created By	Create Date	
Test Petition	[Redacted]	05/04/2018	

Below the table, there are summary links: No Petitions Approved, No Petitions Applied as Exceptions, and No Petitions Rejected.

To delete an existing petition waiting for approval, click on the **Delete Petition** link. Find the petition to delete and click on the paper/pencil icon. A message will appear to confirm the note deletion.