

## PASSPORT QUICK REFERENCE SHEET FOR COUNSELING SERVICES



This is a quick reference for common counselor tasks. More detailed information can be found at [www.peralta.edu/passport](http://www.peralta.edu/passport) under Faculty and Staff Training Documents. For VPN access (to access Passport from off campus), go to <http://access.peralta.edu>

### **I. STUDENT CENTER (RECOMMENDED STARTING POINT)**

- Click "Campus Community"
- Click "Student Services Ctr (Student)"
- Enter Student ID (SID) in "ID" field (if known)
- If SID unknown, enter SSN in "National ID" field
- If SSN unknown, enter last name (and possibly first name) in appropriate fields
- Click yellow "Search" button at bottom lower left of page
- Click any word or number for your student that appear in the row(s) of data under "Search Results"
- Now at the Student Center, first highlight the SID at the top right of the page
- Right click while highlighted and select "Copy" from the menu that appears
- SID is now in your clipboard to be used for subsequent actions

### **“General Info” Tab: Clearing Holds (Service Indicators)**

- Click "General Info" tab at top of page
- Click "Service Indicators" link (first entry in left column of links that appear)
- Any active holds (service indicators) exist will be noted in display
- To clear Matriculation hold or Probation hold, click green "edit service indicators" button to the right
  - NOTE: We CANNOT clear Dismissal hold, Bursar's hold, or Registration hold (which includes Library hold)
- "Service Indicator Data" search page appears with SID already inserted
- Click the link in the left column that describes the actual service indicator (i.e. "NEW" for Matric hold)
- At the next screen, click the "Release" button at the top right side of the page
- Click yellow "Save" button at bottom lower left of page
- To double check that the service indicator has been cleared, refresh the page (re-entering the SID) and check to see that the red universal "Stop" icon no longer appears at the top of the Student Center.
- You can also view any student groups on the "General Info" tab (Veterans, CalWORKS, etc. but not EOPS or DSP&S). The link to Student Groups is under the link to Service Indicators; any group to which the student belongs is displayed in a table further down the page.

### **“Admissions” Tab: Assessment Scores**

- Click "Admissions" tab at top of page
- Scroll down to "Test Summary" area to see summary of tests and scores
  - NOTE: If assessment scores not visible in "Test Summary" area, click green "edit student tests" button at far right
    - Test ID CENG (Compass English) Components:
      - READC (Reading)
      - WRITC (Writing)
    - Test ID CMAT (Compass Mathematics) Subtests:
      - MPRAL (Pre-Algebra)
      - MALG (Algebra)

- MTRIG (Trigonometry)
- MCOAL (College Algebra)
- Test ID CELSA (English as a Second Language) Component:
  - ESL
- Test ID ESLWR (ESL Writing Sample-Essay) Component:
  - ESLWR

### “Academics” Tab: Excess Units






- Click "Academics" tab at top of page
- Scroll down to “Term Summary” area
- Click on current term from list at left
- Click green “edit term data” box on top right of area
- Select “Enrollment Limit” tab at top
- Select “Override Unit Limits” box for current term
- Enter approved number of units in “MAX TOTAL UNITS” field
  - No approval needed for 0- 18 units
  - Counselor approval needed for 18.5-21.5
  - VPSS approval needed for 22-25
  - Maximum allowable is 25 (10 for summer)
- Click “OK” button at bottom left
- NOTE: Can also view student’s current schedule in Term Summary area

## II. PREREQUISITES (MILESTONES)

### Add a New Milestone

- Click "Records and Enrollment"
- Click "Enroll Students"
- Click "Student Milestones"
- Use "Add New Value" tab to add new prerequisite
- Paste SID (copied from Student Center) in "ID" field
- Click magnifying glass to lookup "Academic Career" field
- Click on "Undergrad" or any blue-linked words under "Search Results"
- Click magnifying glass to lookup "Academic Program" field
- Click on "MATR", "EXMPT" or any blue-linked words under "Search Results"
- Click "ADD" button at bottom left
- Enter Effective Date (1/1/xx for Spring semester; 6/1/xx for Summer semester; 8/1/xx for Fall semester)
- Under blue "Milestone Detail" banner, can enter milestone manually (from chart) or click magnifying glass to access list. If using magnifying glass, enter name of discipline in "Milestone" field at top to get list of milestones for that discipline only (i.e. "MATH" for just Math milestones, "CHEM" for just Chemistry milestones, etc.). Then click proper milestone to enter and return to "Milestone Detail"
- Scroll down to “Advisors” blue banner area and enter Advisor (counselor) by clicking magnifying glass, entering last name in proper field, clicking yellow “Look Up” button lower right, and entering name
- Scroll down to “Attempts” blue banner area and in the “Grade Information” tab, select “Completed” from the drop down menu in the “Milestone Complete” field
- Complete the next field to the right (“How Attempted”) by opening the drop down menu and selecting one of ONLY three options:
  - 1) "Course Equivalency" (if using assessment scores)
  - 2) "Course Substitution" (if using an acceptable course to clear the prerequisite)
  - 3) "Multiple Measures" (if using multiple measures)
- Complete the next field to the right (“Date Attempted”)
- Scroll to bottom of page and select yellow "Save" button at bottom left

## Edit Milestones (Change, Delete, Correct, or Add to an existing Milestone)

- Click "Records and Enrollment"
- Click "Student Milestones"
- Stay on "Find an Existing Value" tab
- Paste SID (copied from Student Center) in "ID" field
- Select "Correct History" box at bottom right
- Make needed corrections once into system such as:
  - changing "Effective Date" to 1/1/xx (Spring semester), 6/1/xx (Summer semester) , or 8/1/xx (Fall semester) as needed. NOTE: Use the  or  directly to the right of the "Effective Date", NOT the  or  to the right of the "Milestone" field
  - adding additional milestone (with same effective date) by clicking  at far right
- Depending on action, click yellow "Save" button at bottom left or go to bottom banner and complete the "Milestone Attempts" field as noted in "Add a New Milestone" above

NOTE: The most current list of Milestones can be found by running a query. To do this, follow these steps:

- Click "Reporting Tools" from main menu (left hand sidebar)
- Click "Query"
- Click "Query Manager"
- In the search window that opens, enter PCC\_SA\_MILESTONES\_LIST in the field to the right of "begins with" and click the yellow "Search" button
- When the Milestone query appears, before you access the list, click the checkbox under the "Select" column (first column on the left) and open the drop-down menu to the right of the "\* Action" field. Select "Add to Favorites" and click the yellow "Go" button. The query will now be in your favorites the next time you click the "Query Manager" link and you won't have to search for it again.
- You can access the Milestone list two ways: 1) click the blue HTML link to the right to open the list in your browser or, 2) click the blue EXCEL link to the right to open an Excel spreadsheet with the full list of Milestones (which you can save but will be outdated as soon as the Milestone list is updated).

## III. TRANSCRIPTS

- Click "Records and Enrollment"
- Click "Transcripts" and then "Transcript Request"
- Use "Add a New Value" tab
- Paste SID (copied from Student Center) in "ID" field
- Click down arrow to expand "Transcript Type" field
- Select "UNOFF" from drop-down menu
- Select "Override Service Indicator" box
- Click down arrow to expand "Output Destination" field
- Select "Page" from drop-down menu
- Go to "Request Detail" tab at top of page
- Paste SID into "ID" field (or click magnifying glass to open a "look up" dialog window; can then look up student using last and/or first name)
- Click yellow "Process Request" button at top right of page
- Read "War and Peace". When you're done, the transcript MAY be displayed on your screen
- If so, print transcript using the "File" menu at top left of page (DO NOT click yellow "Print" button at top right of page. If you do, you might as well re-read "War and Peace" while you wait for transcript to print)
- If transcript doesn't print (or prints incompletely), try highlighting all text, go to "Print" command, and click the "Selection" button in the "Print Range" area of the dialog window
- To print the transcript as a .pdf file, follow these steps:

- On the “Report Results” page, click the yellow “Print” button (top right)
- Then click the “Report Manager” link directly below the “Print” button
- Once on the “Report Manager” page, be sure you’re in the “Administration” tab
- Continue to click the yellow “Refresh” button until you see a field below with an “Official Transcript Print” link (it may show as “Processing” until this completes)
- Once it says “Posted” in the “Status” column, click on the “Details” link in the “Details” column
- In the “File List”, click on the link with “.PDF” as the file extension
- The transcript will appear as a .pdf document you can now print (or save)

#### IV. TRANSCRIPT SUMMARY

- Click “Reporting Tools”
- Click “Query”
- Click “Query Manager”
- Click “Search” button at top left part of screen
- Find “PCC\_SA\_TRNSCRIPT\_SUMMARY” (HINT: there are 300 stored queries and the page displays only 30 at a time; our query is located in the page that lists 61-90 of 300).
- Place check mark in left hand radio button and scroll up to “Action” field (right side above list of queries). In drop down menu, select “Add to Favorites” which will NOT put the query in your normal “Favorites” folder but will add the query to your “My Favorite Queries” area below the master list of all queries.
- In future, at the point of “Query” (above), instead of clicking “Query Manager”, click “Query Viewer” and Transcript Summary query will be located in your “My Favorite Queries” area. You CAN add this page to your normal Favorites (located at top of page in “Add to Favorites”)
- Suggest clicking on “HTML View” (right side options) to work with query
- NOTE: Transcript Summary does NOT display courses w/ “W” grades or that are not degree applicable (i.e. basic skills).

#### V. DEGREE AUDIT

- Click “Academic Advisement” in left hand sidebar
- Click “Student Advisement”
- Click “Student Advisement Report”
- Select “Add New Value” tab
  - Select “ADVIS” in “Transcript Type” field
  - Select “PAGE” in “Output Destination” field
  - Ignore “Freeze Record” and “Override Service Indicator” fields
- Select “Request Detail” tab
  - Enter Student ID
  - Enter today’s date
- Click “Process Request” button (upper right)
- Read “War and Peace”

#### VI. MISCELLANEOUS

##### Change Default Date

- Click “PeopleSoft” on PROMT home page
- Click “Student Administration”
- Click “Self Service”
- Click “Campus Personal Information”
- Click “User Preferences”

- Click the magnifying glass in the “Term” field (third one down); leave “Aid Year” field blank
- Term definitions:
  - 1<sup>st</sup> digit is century (“0” for 1900s; “1” for 2000s, etc.)
  - 2<sup>nd</sup> & 3<sup>rd</sup> digits are year (“08” for 2008, “09” for 2009”, etc.)
  - 4<sup>th</sup> digit is semester (“2” for Spring, “3” for Summer, “4” for Fall. NOTE: check class code to see whether intersession is considered Spring or Summer term)
- After selecting default term, click green “Save” button at bottom lower left
- New default term will be activated for all Passport screens visited
- “Faculty Center” default term can only be a term in which you taught a class and which occurred Summer 2008 or later

### Set User Defaults

- Click “PeopleSoft” on PROMT home page
- Click “Student Administration”
- Click “SetupSACR” in left hand menu
- Click “User Defaults”
- In first tab (“User Defaults 1”), enter the following:
  - in the Academic Institution field, enter “PCCDI”
  - in the Academic Career field, enter “UGRD”
  - in Term field, use magnifying glass to look up and enter desired term
- In 4<sup>th</sup> tab (“User Defaults 4”), enter the following:
  - select the “Carry ID” radio button
  - in the Output Destination field, enter “PAGE”
  - in the Transcript Type field, enter “UNOFF” (if you want to pull a transcript; you’ll manually enter “ADVIS” when you want to run the Degree Audit)

### Using and Organizing Favorites (This may save your life. Well, OK, at least a LOT of time)

Every time you start a key action (clearing a milestone, accessing the Student Center, finding a transcript, etc.) or get to a window or gateway that you use a lot, add the page to your Favorites by doing the following:

- While on the page you want to save, click the “Add to Favorites” link at the top right of the page
- This will open a new “Add to Favorites” window with the default name of the page already entered in the “Description” field
- Use the default name of the page or change the name to something that works for you. For example, if you’d prefer to call them “Holds” vs. “Service Indicators” or “Prerequisites” vs. “Milestones”, enter the name you want to use when taking this action
- Click the yellow “OK” button at the bottom left and you’re done
- The page will now be entered in a list under the “My Favorites” link that is the first entry in the “Menu” that appears after you click the “Student Administration” link under PeopleSoft after you first log in
- New favorites are automatically entered at the top of the list

To organize your Favorites, do the following:

- Click open the “My Favorites” link
- Click on “Edit Favorites” (last entry in the list)
- Your existing favorites will now be displayed in the order in which you entered them
- To change the order, enter your preferred order number in the “Sequence Number” column (“1” for first, “2” for 2<sup>nd</sup>, etc.; lower numbers lead the list)
- To delete a favorite, click the yellow “Delete” button at the far right of the favorite you want to delete

- When done organizing, click the yellow “Save” button at the bottom left

### Check Term Activation

Check this if everything seems in order but a student says they “can’t enroll”. If they haven’t enrolled in at least one class in a full academic year without a break since they completed an application (and enrolling and then dropping a class counts), they may not be active for the term (and will have to update their application in CCC Apply).

- Click “Records and Enrollment”
- Click “Student Term Information”
- Click “Term Activate a Student”
- Check the second line down (“Term”) to see if the student is active for the current term

### Find a Student on a Class Roster

Use this when a student isn’t sure if they’re enrolled (and it’s not obvious in their Student Center).

- Click “Curriculum Management”
- Click “Class Roster” (both times)
- Use magnifying glass to look up appropriate term
- Enter course code in “Class Number” field
- Enter course number (i.e. MATH 203) in “Catalog #” field

### Find a Student’s Campus I.D.

Use this when helping a student find their Passport User ID and Password and they either don’t know their Social Security number or their SSA# doesn’t work for some reason.

- Click “Campus Community”
- Click “Personal Information (Student)”
- Click “Add/Update a Person”
- Check the “Campus ID” field under the “Person Information” blue banner. NOTE: this field isn’t always populated but it’s worth a shot

### Viewing Student Groups

- Click “Campus Community”
- Click “Personal Information (Student)”

### Finding Information from a Previous Term (i.e. Course Name, Course Code, Instructor Name, etc.)

- Go into Student Center
- Click “Academics” tab (in top tab banner)
- Scroll down to “Term Summary” area (about midway down)
- Click on each term for which information is wanted
- Check right side of page for class schedule
- Click link embedded in each course which opens up “Details” and course information appears

## VI. ITEMS TO ADD