Course Transfer System
User Instructions

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Contents

1   Overview

The Course Transfer System is a comprehensive web application designed to help students and academic advisors plan course transfers between institutions, particularly from community colleges to universities. The system maps course equivalencies, tracks degree progress, and provides intelligent course suggestions to optimize transfer pathways.

Primary Use Case: Students transferring from a community college to a state university can use this system to plan their academic journey, ensure credits transfer properly, and track progress toward degree completion.
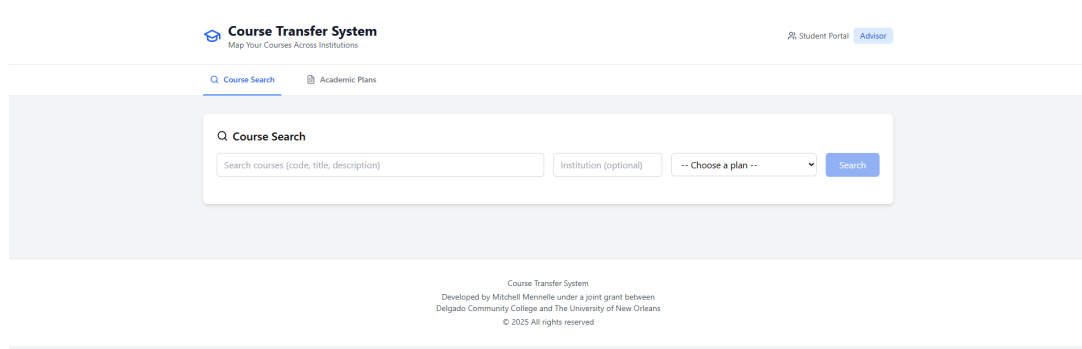

Figure 1: Course Transfer System Homepage

2   Getting Started

2.1   System Access

1. Open your web browser and navigate to the Course Transfer System

2. The system loads with the **Course Search** tab active by default

3. Choose your user mode in the top-right corner:

    - **Student Portal**: For individual students planning their transfers
    - **Advisor Portal**: For academic advisors managing multiple student plans

2.2   User Modes

Student Mode:

- Search for courses and view transfer equivalencies

- Create and manage personal academic plans

- Track degree progress

- View course suggestions based on requirements
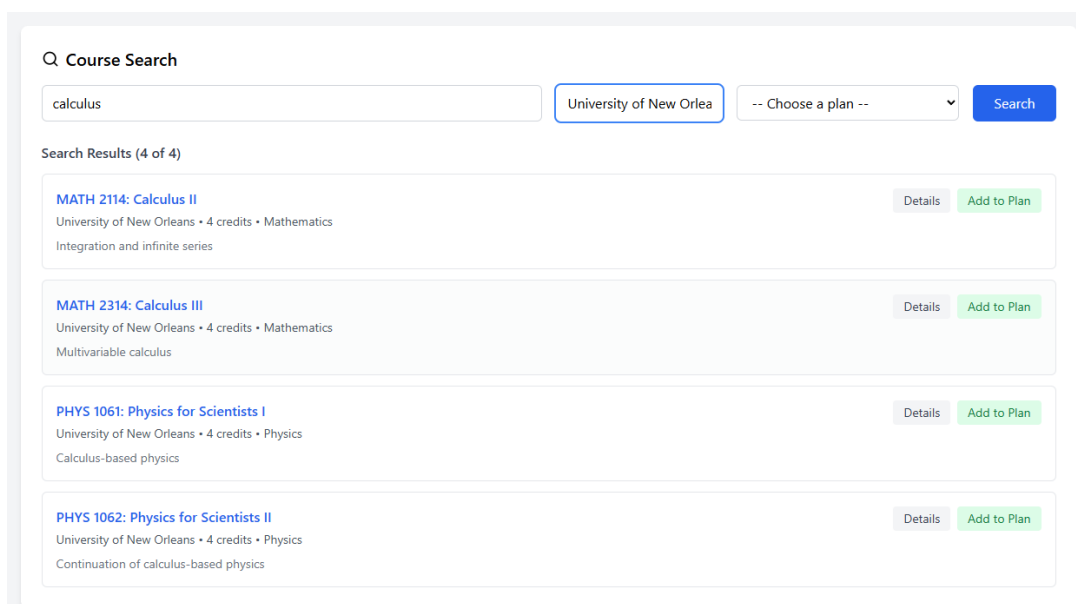
Advisor Mode:

- All student features, plus:

- CSV upload functionality for bulk data management

- Enhanced plan management tools

3   Core Features & How to Use Them

3.1   Course Search & Discovery

Accessing Course Search:

- Click the **"Course Search"** tab in the navigation bar

- This is your starting point for finding courses and understanding transfer options

Figure 2: Course Search Interface

How to Search:

1. **Enter Search Terms**: Type course codes, titles, or keywords in the search box

   - Examples: "BIOL 101", "Introduction to Biology", "calculus"

2. **Filter by Institution** (optional): Specify which college or university

3. **Select a Plan** (optional): Choose from your existing plans to add courses directly

4. **Click "Search"** or press Enter

Understanding Search Results:

- Each course shows: Code, Title, Institution, Credits, Department

- **Requirement Category**: System automatically detects which degree requirement the course might fulfill

- **Filter by Requirement**: Use the dropdown to show only courses for specific requirements

Viewing Course Details:

- Click the **"Details"** button on any course

- View complete course description, prerequisites, and **transfer equivalencies**

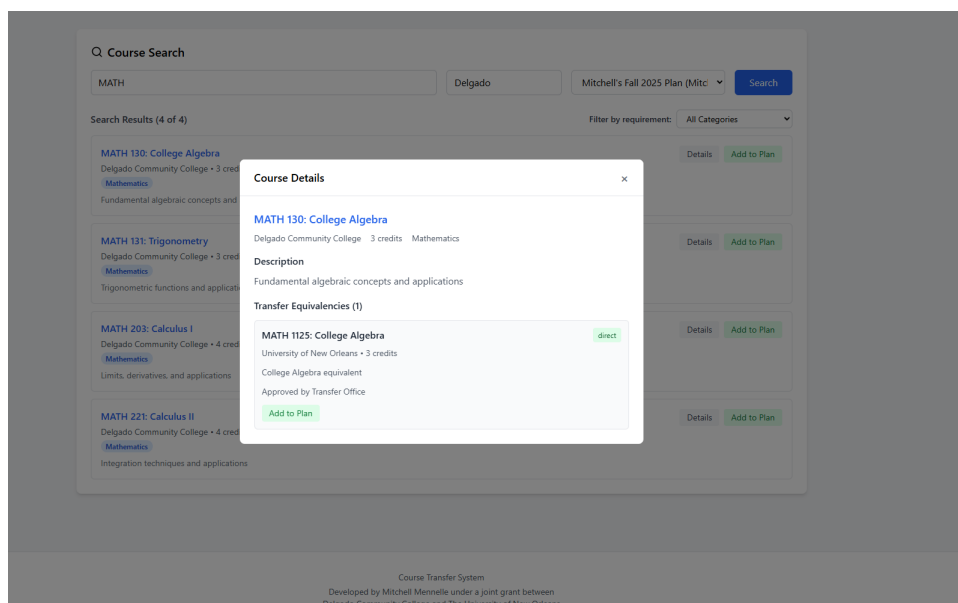- See which courses at other institutions are equivalent

Figure 3: Course Details Modal

Transfer Equivalency Information:

- **Green badges**: Direct equivalency (transfers exactly)

- **Yellow badges**: Partial equivalency (may have conditions)

- **Gray/Red**: No equivalent or does not transfer

- Each equivalency shows the target course and any special notes

3.2   Academic Plan Management

3.2.1   Creating Your First Plan

When you first access the Academic Plans section, you'll see an empty state prompting you to create your first plan:
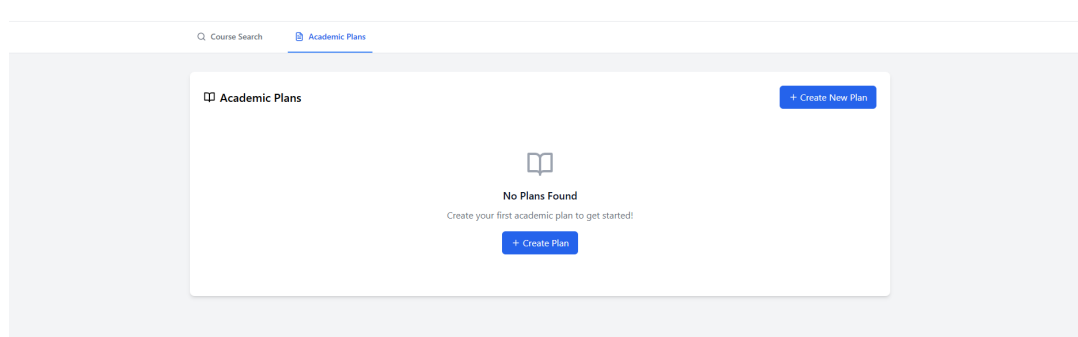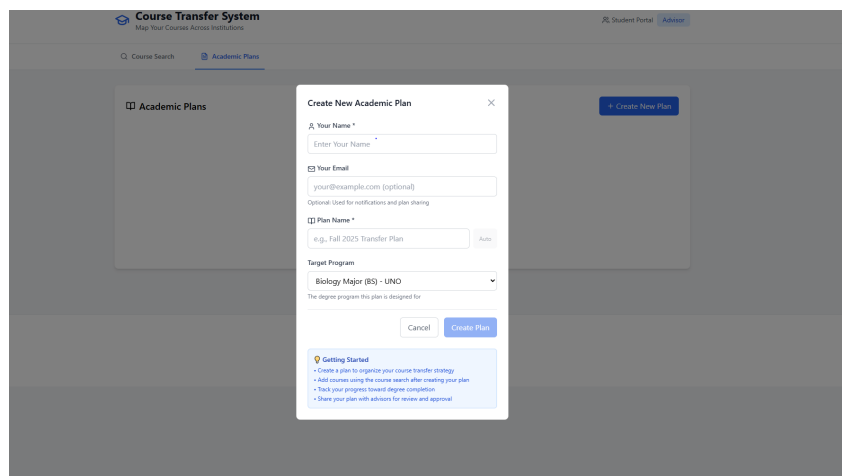

Figure 4: No Plans Found Screen

Creating Your First Plan:

1. Click the **"Academic Plans"** tab

2. Click **"Create New Plan"** (blue button)

Figure 5: Create New Plan Modal

3. Fill out the form:

   - **Your Name**: Enter your full name
   - **Email**: Optional, for notifications
   - **Plan Name**: Descriptive name (auto-generated suggestion available)
   - **Target Program**: Select your intended degree program

4. Click **"Create Plan"**

Figure 6: Filled Create Plan Form

3.2.2   Managing Your Academic Plans

Once you have created a plan, you can view and manage it:
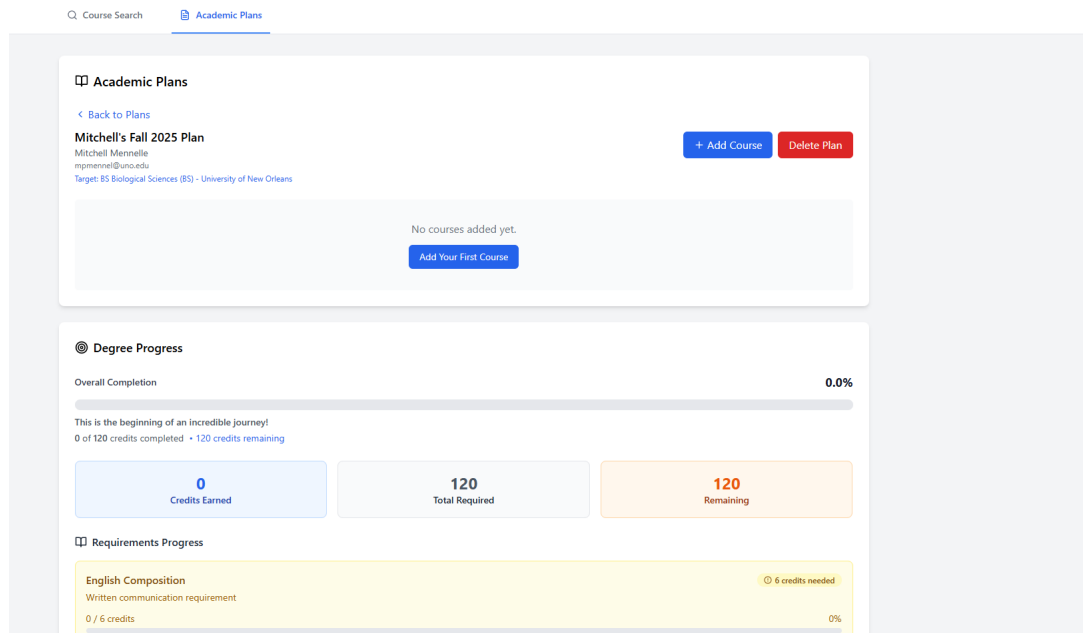
Figure 7: Academic Plan Overview

Managing Multiple Plans:

- View all your plans on the main Academic Plans page

- Each plan shows status, creation date, and number of courses

- Click on any plan to view details and make modifications

- Use the delete button (trash icon) to remove unwanted plans

3.2.3   Adding Courses to Your Plan
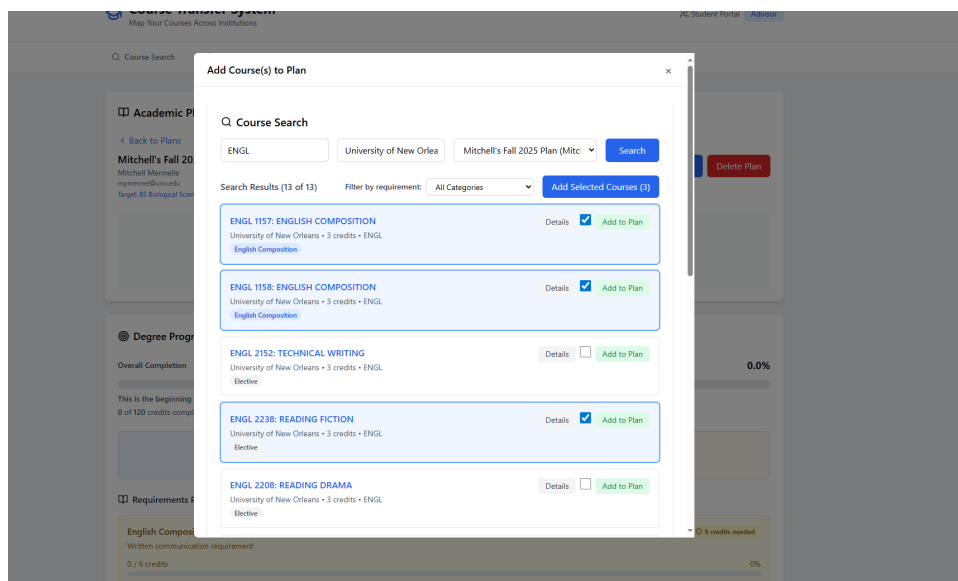
Figure 8: Add Courses Modal

Adding Courses to Your Plan:
  Method 1 - From Course Search:

1. Search for courses using the Course Search tab

2. Select a plan from the dropdown in the search interface

3. Click **"Add to Plan"** next to any course

Method 2 - From Plan Details:

1. Open your plan by clicking on it

2. Click the **"Add Course"** button

3. Search and select courses in the modal window

Figure 9: Course Search in Add Modal

Method 3 - Bulk Addition:

1. In Course Search, use checkboxes to select multiple courses

2. Click **"Add Selected Courses"** to add them all at once

> **Course Assignment Details**
>
> When adding courses, you'll specify:
>
> - **Requirement Category**: Which degree requirement this course fulfills
>
> - **Semester & Year**: When you plan to take or took the course
>
> - **Status**: Planned, In Progress, or Completed
>
> - **Grade**: If completed, enter your grade
>
> - **Notes**: Any additional information

Smart Category Detection: The system automatically suggests requirement categories based on:

- Course code patterns (BIOL courses → Biology requirements)

- Degree program requirements

- Course catalog information

3.3   Progress Tracking & Degree Planning
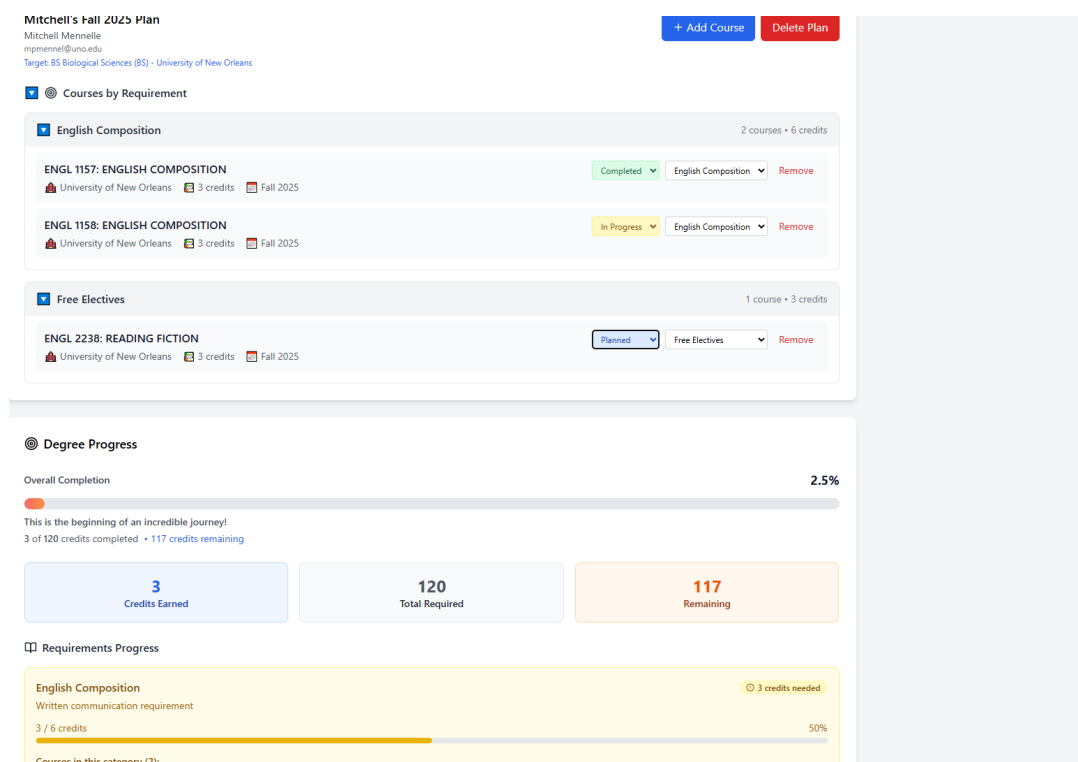
3.3.1   Understanding Your Progress

Figure 10: Plan with Courses Added

Understanding Your Progress:

- Open any plan to see the **Progress Tracker** section below

- View overall completion percentage and credits earned

- See detailed breakdowns by requirement category

Progress Elements:

- **Overall Progress Bar**: Visual representation of degree completion

- **Credits Summary**: Earned/Required/Remaining credits

- **Requirement Status**: Green (complete), Yellow (in progress), Red (not started)

- **Course Lists**: See exactly which courses count toward each requirement

3.3.2   Detailed Requirements Breakdown
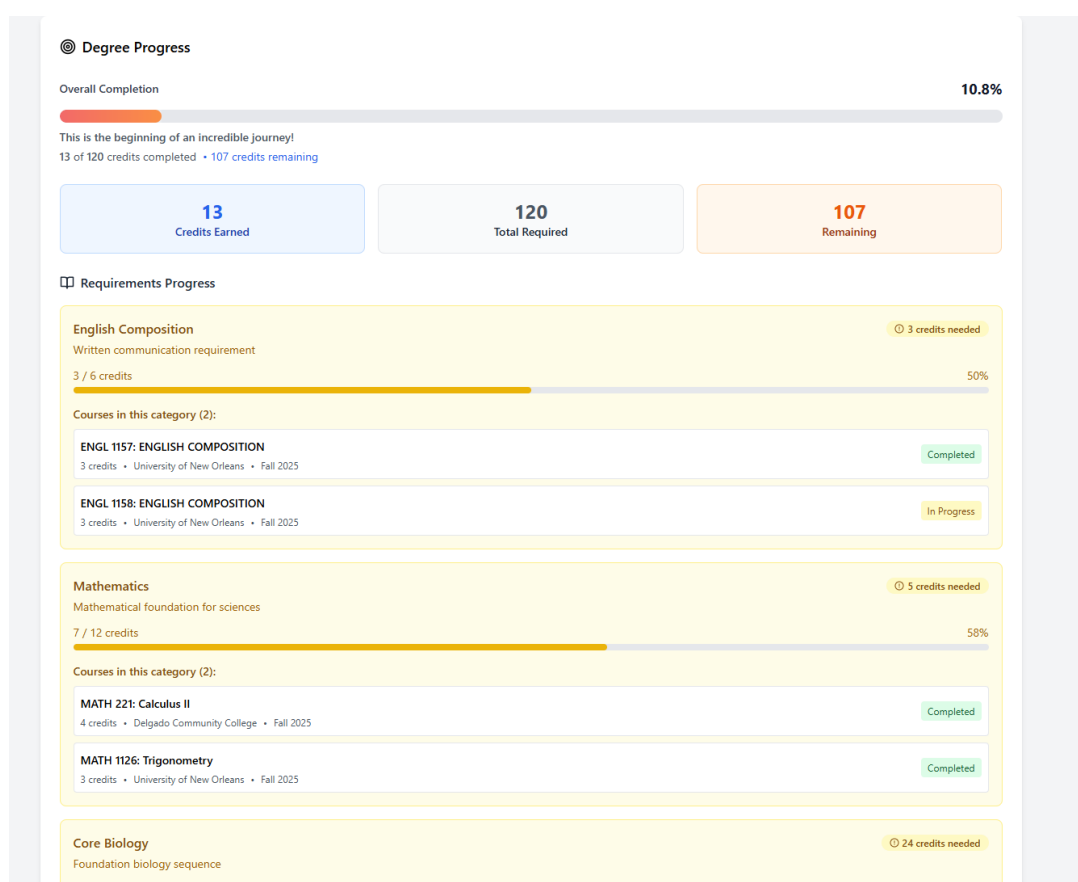

Figure 11: Requirements Progress Detail

Interpreting Requirements:

- **Simple Requirements**: Need a specific number of credits in a category

- **Grouped Requirements**: Choose X courses from a defined list

- **Conditional Requirements**: Complex rules with multiple options

Getting Course Suggestions:

- The system analyzes your current plan and unmet requirements

- Suggests specific courses that would fulfill remaining requirements

- Prioritizes courses with known transfer equivalencies

- Shows both target institution and community college options

3.4   Working with Transfer Equivalencies

Understanding Equivalency Types:

- **Direct**: Course transfers exactly as equivalent

- **Partial**: Transfers but may not fulfill all the same requirements

- **Conditional**: Transfers under specific conditions

- **No Equivalent**: Course doesn't transfer for credit

  Finding Transfer Options:

1. Search for courses at your current institution

2. View course details to see transfer options

3. Look for equivalent courses at your target institution

4. Add the appropriate course to your plan

Special Cases

- **"1000NE" courses**: System placeholder for "No Equivalent"

- **Multiple equivalencies**: Some courses may transfer to several different courses

- **Institution-specific**: Equivalencies are specific to institution pairs

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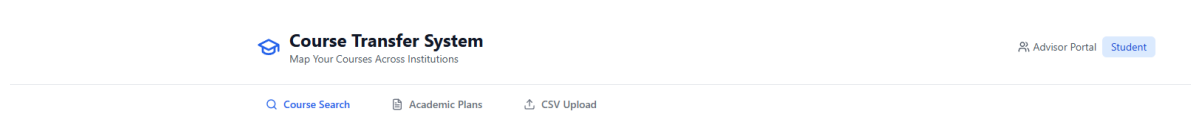# 4   Advanced Features

4.1   CSV Upload (Advisor Mode Only)

Figure 12: CSV Upload Interface

Purpose: Bulk import of course catalogs, equivalency mappings, and program requirements
  Upload Types:

4.1.1   Course Information

Figure 13: Course Information Upload

- Upload course catalogs with codes, titles, credits, descriptions

- Required columns: code, title, credits, institution

- Optional: description, department, prerequisites

4.1.2   Course Equivalencies

Figure 14: Course Equivalencies Upload

- Map courses between institutions

- Required: from_course_code, from_institution, to_course_code, to_institution

- Optional: equivalency_type, notes, approved_by

4.1.3   Program Requirements

Figure 15: Program Requirements Upload

- Define degree requirements and grouping rules

- Supports complex grouped requirements ("choose 2 from group A")

- Required: program_name, category, credits_required, requirement_type

Using CSV Upload:

1. Switch to Advisor Mode

2. Click the **"CSV Upload"** tab

3. Select upload type from dropdown

4. Download sample CSV to see required format

5. Prepare your data using the sample as a template

6. Drag and drop your file or click to browse

7. Review upload results and any error messages

5   Tips for Success

5.1   For Students

> **Planning Your Transfer**
>
> 1. **Start Early**: Create your plan as soon as you know your target program
>
> 2. **Verify Equivalencies**: Always confirm transfer credits with your advisor
>
> 3. **Plan Sequentially**: Consider prerequisites when scheduling courses
>
> 4. **Monitor Progress**: Regularly check your degree progress tracker
>
> 5. **Use Both Institutions**: Look for courses at both your current and target schools

Maximizing Credit Transfer:

- Focus on courses with direct equivalencies

- Take higher-credit courses when possible

- Complete general education requirements first

- Avoid courses marked as "no equivalent" unless required

5.2   For Advisors

Managing Student Plans:

- Create plans for students during advising sessions

- Use bulk course addition for common transfer pathways

- Review and approve student-created plans

- Update equivalency information as policies change

Data Management:

- Regularly update course catalogs via CSV upload

- Maintain current equivalency mappings

- Update program requirements when curricula change

- Use error reports from uploads to clean data

6   Troubleshooting Common Issues

6.1   Course Search Problems

No results found:

- Check spelling of search terms

- Try broader search terms (partial course codes)

- Verify institution name is correct

- Contact administrator if courses are missing

Wrong equivalency information:

- Equivalencies may be outdated or incomplete
- Always verify with official sources
- Report discrepancies to your advisor
- Check for multiple equivalency options

6.2   Technical Issues

Page loading slowly:

- Large course catalogs may take time to search
- Clear browser cache if pages aren't updating
- Check internet connection
- Try refreshing the page

7   Support & Resources

7.1   Getting Help

For Students:

- Contact your academic advisor for plan review
- Reach out to the registrar's office for official equivalency verification
- Use the system's built-in course suggestions as a starting point
- Check your institution's transfer credit policies

For Advisors:

- Contact system administrators for technical issues
- Report data accuracy problems for correction
- Request training sessions for new features
- Provide feedback for system improvements

Important Notes

Data Accuracy:

- Course information and equivalencies are updated regularly but may not reflect the most recent changes
- Always verify transfer credits with official institutional sources
- Use this system as a planning tool, not a guarantee of credit transfer

Plan Limitations:

- Plans are for academic planning purposes only

- Official degree audits supersede system calculations

- Some special requirements may not be fully represented

- Complex degree programs may require advisor consultation

8   Conclusion

The Course Transfer System is designed to simplify the complex process of planning course transfers and tracking degree progress. By combining course search, equivalency mapping, and progress tracking in one interface, students and advisors can make informed decisions about academic pathways.

Remember that this system is a powerful planning tool, but official institutional policies and advisor guidance should always be consulted for final decisions about course transfers and degree requirements.

For technical support or questions about system features, contact your institution's academic support services.