

# **INDIANA UNIVERSITY**

OFFICE OF THE EXECUTIVE VICE PRESIDENT FOR UNIVERSITY ACADEMIC AFFAIRS

University Transfer Office

10/15/2018

### **Creating a Rule**

#### Part 1: Searching for External Org ID

If the external org ID is not given with the rule that is to be created, it will have to be found before any part of the process can be completed.

- Go to Transfer Subject Area: Main Menu>Records & Enrollment>Transfer Credit Rules>Transfer Subject Area.
- Click on the magnifying glass beside Source ID.
  - Source ID is the same as External Org ID.

	ce ID								
									? Help
Source ID:	begins with 🔻								
Description:	begins with 🔻								
Organization Ty	pe: begins with 🔻		Q						
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FICE Code:	begins with V								
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- Using Transfer Subject Area gives more fields to search by.
- The Description can be used to search, but it is unreliable. When first set up, the institution name might be abbreviated. There are inconsistencies in this process as it is the personal preference of the individual as to how it is abbreviated making this process hard to standardize.

- The most accurate item to search by is the ATP code. For Community Colleges, Universities, etc. the code is four digits. If it is six digits with two leading zero's it is a High School. We do not set up rules using the High School institutions.
  - Check the School Code to make sure it is appropriate.
  - To find the ATP code, use the CEEB code in TES located under the institution profile. This is also a good time to check if the institution is regionally accredited or not.
- Select the correct Source ID by evaluating the Description, ATP Code, School Type, City, and State. It is necessary to make sure the correct Source ID is used.
- If there is ever a concern with an ID, contact UTO (<u>uto@iu.edu</u>).

#### Part 2: How to Check for Courses

Check to see if the course has already been added to the External Course Catalog for that school.

- The subject and number are added using two separate pages in SIS.
  - a) School Subject Maintenance.
  - b) School Course Classification.

#### A. School Subject Maintenance

- Main Menu>Campus Community>Organization>Create/Maintain Org>School Subject Maintenance.
- Adds course to the External Course Catalog for incoming school.
- Search the External Org ID with Correct History selected to see what subjects (if any) have been already added to the catalog.

				Home	Print	
avorites Main Me	enu > Campus Cor	mmunity > Organi	zation > Create/Maintain Organizatio	ns > School Subject Maintenance		
School Subject	Maintenance					
Inter any informatio	n you have and clic	k Search. Leave fie	lds blank for a list of all values.			
Find an Existing V	alue					
7 Search Criteria						
External Org ID:	begins with 💲	0000025516	<u></u>			
Search Name:	begins with 💲					
Organization Type	begins with 💲		Q			
City:	begins with \$					
State:	begins with \$		Q			
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Include History	Correct Histor	TY I				
imit the number of	results to (up to 300	0): 300				
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Search	Basic Search	Save Search	Chiena			

• Once it has been determined that a subject needs to be added click the plus box to open a blank subject form. The School Subject, Effective Date (use 01/01/2003), Description and External Subject Area will have to be entered.

nool Subject Ma	intenance						
D: 0000025516 And	cilla College		1	2 🖓 🛽	3		
ool Subject			Find   View All	First 🚺 2 of	69 🖸 Last		
hool Subject:	Q				+ -		
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ffective Date:	03/24/2015 🛐 *Statu	s: Active	\$		+ -		
escription:							
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xternal Subject Area:	<b>Q</b>						
Q Peturn to Search	h		El Undate/Displ	av 🖾 Inc	lude History	Correct Histo	DV

• It should look like the following:

rites Main Menu > Camp	us Community > Organiz	ation > Create/M	aintain Organizatior	is > School Subject I	Maintenance	
Di 0000025516 And	intenance illa College		<b>1</b>			
hool Subject			Find   View All Firs	t 🚺 1 of 68 🕨 Last		
School Subject:	AC Q		Find First	+ -		
Effective Date: Description: Short Description:	01/01/1901 🛐 *Statu Accounting AC	s: Active	•	•		
External Subject Area:	BUS Q Business	3				
Save Q Return to Search	h		E Update/Display	Include History	Correct Histo	угу

Save after data has been entered!

Home	Print
Favorites Main Menu > Campus Community > Organization > Create/Maintain Organizations > School Course Classification	
School Course Classification	
Enter any information you have and click Search. Leave fields blank for a list of all values.	
Eind on Evidine Velue	
Find an Existing value	-
✓ Search Criteria	
External Org ID: hening with 1 0000025516	
School Subject	
begins with +	
Search Name: begins with \$	
Include History	
Limit the number of results to (up to 300): 300	
Search Clear Basic Search Basic Search Criteria	
Search Results	
View All First = 1-68 of 68 = Last	
Strange Org ID School Subject Description	
D00025516 AC Ancilla College ANCILLACOLLEGE	
0000025516 ACCT Ancilla College ANCILLACOLLEGE	
UUUUU25516 AR Ancila College ANCILLACULLEGE	
0000025516 ART Ancilla College ANCILLACOLLEGE	

#### **B. School Course Classification**

- Main Menu>Campus Community>Organization>Create/Maintain Org>School Course Classification.
- Now that the subject has been added, the individual courses under that subject are able to be entered using *School Course Classification*.

T	Home	Print
avorites Main Menu > Campus Community > Organization > Create/Maintain Organizations > School Course	e Classification	
School Course Classification		
Enter any information you have and click Search. Leave fields blank for a list of all values.		
Find an Existing Value		
▼ Search Criteria		
External Org ID: begins with +		
School Subject: begins with +		
Search Name: begins with \$		
Include History Correct History		
imit the number of results to (up to 300): 300		
Search Clear Basic Search 🗉 Save Search Criteria		

- Search by entering the External Org ID# and checking Correct History.
- Pick the appropriate subject from the list that appears.

• Once the subject is selected, the course number can now be added. The School Course Number, Effective Date (use 01/01/2003), Description, Career, External Course Type, Course Level and External Units will have to be entered. SAVE!

hool Subject: ACCT Accounting Find View All First 1 of 2 Last School Course Number: 110 School Course Details Find First 1 of 1 Last Find First 1 of 1 Last First 1 of 1 Last Fi	ID: 0000025516 Ancilla College	<b>1</b> 2 🖓	1	
chool Course Number   School Course Number:   110   School Course Details   *Effective Date:   08/01/2003 is   *Status:   Active +   *Description:   Financial   *External Subject Area:   BUS   Business   *Career:   Undergrad +   Course Evel:   Freshman +	hool Subject: ACCT Accounting			
School Course Petalls     *Effective Date:     08/01/2003 3 *Status:     *Description:   Financial Accounting   *Description:   Financial Accounting   *External Subject Area:   BUS Business   *Career:   Undergrad ‡   Course ± Course ± Course ± Course Level:   Freshman ‡	chool Course Number	<u>Fin</u>	d   <u>View All</u> First 🚺 1 of 2 🕨 Last	<u>t</u>
Teffective Date:       D8/01/2003 is *Status:       Active +         Tescription:       Financial Accounting         Short Description:       Financial         rExternal Subject Area:       BUS @ Business         "Career:       Undergrad +         External Course Type:       Course Level:         Freshman +       3.00	School Course Details			
	Effective Date:       08/01/2003 🛐 *Status:         Description:       Financial Accounting         Short Description:       Financial         External Subject Area:       BUS Q Business         Career:       Undergrad ÷         External Course Type:       Course ÷         External Units:       3.00	Active ÷	]	

#### Part 3: Creating the Rule

To create the rule you will use the following pages:

- a. Transfer Subject Area.
- b. Course Transfer Rules.
- c. Program/Source Equivalency.

#### A. Transfer Subject Area

- Go to Main Menu>Records & Enrollment>Transfer Credit Rules>Transfer Subject Area.
- Type in the campus code in the Academic Institution field (IUBLA, IUEAA, IUNWA, etc.).
- Type or paste in the Org ID in the Source ID field.
- Correct History needs to be checked in order to make any changes.
- Click on Search.
- The Component Subject Area and School Subject are an optional entry but can be used to sort for a specific subject.
- When no matching values are found, a new value will have to be entered.

Fransfer Subject Area	ve and click Sean	ch. Leave fields blan	k for a list of all	values.	
Find an Existing Value	Add a New Value				
Search Criteria					
Academic Institution: Source ID: Component Subject Area: School Subject: School Course Nbr: Include History Corr imit the number of results to Search Clear Ba	begins with begins with begins with begins with \$ begins with \$ ect History (up to 300): 300 sic Search	IUNWA         0000025516         AC         O         Save Search Criteria	ব ব ব ব ব		
lo matching values were fou	nd.				

• Once Add a New Value has been selected another window will appear. Most of the information should pull forward from the previous screen but if not just fill them out again and click Add.

	UNIVERSITY
Favorites Main Menu >	Records and Enrollment > Transfer Credit Rules > Transfer Subject Area
•	· · · · ·
Transfer Subject Are	a
Find an Existing Value	Add a New Value
Academic Institution:	IUNWA Q
Credit Source Type:	External Organization +
Source ID:	0000025516 Q
Component Subject Area	L AC
Add	
Find an Existing Value Ad	d a New Value
_	

- On the Transfer Subject Area page the basic info has to be filled out.
  - Change the Effective Date to 08012003 (slashes will fill in when you tab out) as it'll always default to current date.
  - Description is the name of component subject area given in external school's course catalog.
  - Min Units is 0.5 or 0.25 depending on campus preference. 0.25 is used by regional campuses.
  - Min Grade Pts per Unit is 2.00 (represents a "C" grade).
  - Term Type will usually be Semester or Quarter depending on the calendar system of that particular school.
  - Check the TransferIn box <u>only</u> if it's an Indiana public college.

ansfer Subject Area	oject Area Elements				_	
Academic Institution:	IUNWA	Northwest				
Source ID:	0000025516	Ancilla College				
Component Subject Area:	AC					
			Ē	ind   View All First 🚺	1 of 1 🗈 La	ist
Effective Date:	03/24/2015	Status: Active \$			+ -	
Description:				TransferIN		
atalan Ora Turas	(Example to)					
satalog Org Type:	External 7					
Catalog Organization:	0000025516	Ancilla College				
Component Defaults			1			
Min / Max Units:	1.00 9	9.00 Term	Туре:	Semester ‡		
Min / Max Grade Pts per U	nit: 1.000 99	9.000				
Internal Equiv Course Val	Je: Specify Fixed	Units 🗧				
Excess Credit Defaults						
Course ID:	Q					
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Requirement Designation						
Course ID.	n:					

### Filled page:

ansfer Subject Area	Subject Area Elements					_	
cademic Institution:	IUNWA	Northwest					
ource ID:	0000025516	Ancilla College					
component Subject Area	AC						
					Find View All First	1 of 1 D Last	
ffective Date:	08/01/2003	*Status: Activ	/e \$			+-	
escription:	Accounting				TransferIN		
atalag Org Tupor	(Entrance A)						
atalog org Type.	External +						
atalog Organization:	0000025516 Q	Ancilla College					
Component Defaults							
Min / Max Units:	0.25	99.00	Term Typ	e:	Semester ‡		
Min / Max Grade Pts per	Unit: 2.000	99.000					
Internal Equiv Course V	alue: Specify Fix	ed Units 💠					
Excess Credit Defaults							
Course ID:	Q						
Requirement Designat	tion:						
				(			
Save			E+ Add	Update/Displa	ay 🖉 Include History	Correct H	istory

Next, move onto the Subject Area Elements tab. This is where the rule is created.

- Transfer Priority will always be "1" for a one to one or a one to many rule. If an incoming course has more than one rule, then the most complex rule should be given priority 1 so the database will look for all the courses listed before going to the rule set up as priority 2.
- The Incoming Course subject and course number should be added exactly like it is either on the transcript or in that schools course catalog. These values have to match what were used to create the course in the External Course Catalog.
- The Internal Equivalent is the IU course that is going to be used for the rule. If the Course ID is not given then use the magnifying glass to search for the course needed. Once the Course ID is selected the Offer Number autofill's. The Default Grade should always be *By Incoming Course* and it'll default to the external course number. The grade for the transfer credit will then show as "TA", "TB", etc.
- The Units will come up as our course value or "0" for undistributed courses; change it to the semester or quarter hour equivalent of the incoming course value. Note: the hours will default to the lowest number of hours allowed for a particular IU course, so check the hours and change if needed. If the external course is one with variable hours, then it's best to leave as "0" so the analyst is forced to add the hours the student actually took.
- If two IU courses are needed, the plus sign in the Internal Equivalent box will add another course area. To add another rule, the plus sign in the Subject Area Elements box is used.

ansfer Subject Area	ubject Area Elements					_		
cademic Institution:	IUNWA	Northwest						
Source ID:	0000025516	Ancilla Coll	ege					
Component Subject Area	: AC					Review I	listory	
					Find View All	First 🚺 1 o	f 1 🖸 Last	
ffective Date:	08/01/2003	Status:	Active	Term	4036		+ -	
escription:	Accounting							
ublect Area Elements					Find Mour All	First 1 of	1 D Lost	
*Sequence Number:	0001				Find View Au	Filst 1 Of	+ E	
Sequence Number.	0001					_		
*Description:	Accounting							
*Term Type:	Semester ‡							
Transfer Course:								
*Transfer Priority:	1		*Internal Equiv Co	urse Value:	Specify Fixed Uni	its	\$	
Contingent Credit:			Save Excess Unit	s to a				
ncoming Course			Internal Equivale	ent		2		
Seq#: 1		+	Course ID:	Q			+-	
WildCard:			*Offer Number:	Q				
Subject:	Q		Units:	0.00				
ourse Number:	Q		*Default Grade:	By Transfe	Equivalency Setup	\$		
coming Course Information	on 🔶 🚽							

- Incoming Course Information is used to set a date range for when the rule is in effect. The default is 01/01/1900-12/31/9999.
- Example: Filled.

ransfer Subject Area	Subject Area Elements					_
Academic Institution:	IUNWA	Northwest				
Source ID: Component Subject Are	0000025516 a: AC	Ancilla Colle	ege			Review History
	- //0				Find View All	First 🗹 1 of 1 🖸 Last
Effective Date: Description:	08/01/2003 Accounting	Status:	Active	Term	4036	+ -
Subject Area Elements					Find View All F	irst 🚺 1 of 1 🖸 Last
*Sequence Number: *Description: *Term Type: Transfer Course:	0001 Accounting Semester +					•
*Transfer Priority: Contingent Credit:	1		*Internal Equiv C Save Excess Un Course:	ourse Value: lits to a	Specify Fixed Units	<b>i</b>
Incoming Course			Internal Equiva	lent	BUS UN 100	
WildCard:			*Course ID:	050822 Q	BUS UNDISTRIBUT	ED-100 LEVEL
Subject: AC	Q Account	ing	Units:	3.00		
Course Number: 110	Q Financia	al Accounting	*Default Grade:	By Incomin	g Course	•
ncoming Course informati			*Course:	Seq 1: A	C 110	•
				Undate/Display	K Include History	Correct History

- When creating many-to-many rules, make sure each Internal Equivalent has a different Incoming Course selected in the Course section.
- When creating many-to-one rules, use the first incoming course in the Course section of the Internal Equivalent.

Save after data has been entered!

• Once saved this box will appear. This is normal and is only reminding that the process is not yet complete.

Source ID:	0000025516	Ancilla College	
Component Subject	Area: AC		Review History
Message			
Warning You added a You may also want to a	a new effective-date to the add a new effective-date ir	Course Transfer Rule table. (14600,812) the Program/Source Equivalency to make sure th	ne Articulation Process picks up this new rule.
			OK Cancel
*Description:	Accounting		
*Term Type:	Semester ‡		1
			-

#### **B.** Course Transfer Rules

- Go to Transfer Credit Rules>Course Transfer Rules.
- Type in the campus code in the Academic Institution field.
- Type or paste in the Org ID in the Source ID field.
- Click on Search.
- You should get *No matching values were found*.
- Click on Add a New Value.

Favorites Main Menu	A UNIVERSITY > Records and Enrollment > Transfer Credit Rules > Course Transfer Rules	4
Course Transfer R	Add a New Value	
Search Criteria	Tan a new value	
Academic Institution: Source ID: Equivalency Rule: Include History	begins with ÷   IUNWA   begins with ÷   begins with ÷	
No matching values were	Add a New Value	

- Type All in the Equivalency Rule field.
- Click on Add.

<b>W</b> INDIANA UNIVERSITY
Favorites Main Menu > Records and Enrollment > Transfer Credit Rules > Course Transfer Rules
Course Transfer Rules
Find an Existing Value Add a New Value
Academic Institution: IUNWA
Credit Source Type: External Organization \$
Equivalency Rule:
Add
Find an Existing Value Add a New Value

- Type in the Effective Date when this Course Transfer Rule (CTR) is to go into effect. We usually use 08012003 as that's the date used for the conversion of rules for most of the campuses.
- Type in the external school's name in the Description field as it appears to the right of the source ID number (if the name is real long, then type in as much as it will allow).
- Under the Transfer Subject Area, click on the look up button and select the first subject.
- Click on the plus sign to add the remaining subjects in any order. The list will be alphabetized the next time you open it.
- Click Save.
- You'll get the *new effective date* warning and click OK.

## **U** INDIANA UNIVERSITY

Favorites | Main Menu > Records and Enrollment > Transfer Credit Rules > Course Transfer Rules

### **Course Transfer Rules**

			Find   View Ali First 🚺 1 of 1 🖸 Last	
Academic In:	stitution: IUNWA	Northwest	+ -	
Source ID:	0000025516	Ancilla College		
Equivalency	Rule: ALL			
*Effective Dat	e: 08/01/2003	iii *Status: Active :		
*Description:	Ancilla Co-AL	L		
Transfer Su	bject Area		Find First 1-22 of 22 D Last	
+-	AR Q	Art		
+ Click	to add	Click to select depts		
+ -	Q	Bro		
+- (	CA Q	Communication		
+- (	сн 🔍 🔍	Chemistry		
+- (	COMM	Communication		
+- (	cs Q	Computer Science		
+	EN Q	English		
100 100 100				

If you need to add another effective date, then:

- Click on the Correct History button.
- Click on the plus sign.
- Change the Effective Date.
  - NOTE: The dates must be added in ascending order.
- Click on SAVE.

#### C. Program/Source Equivalency

- Go to Transfer Credit Rules>Program/Source Equivalency.
- Type in the campus code in the Academic Institution field.
- Type or paste in the Org ID in the Source ID field.
- Click on Search.

• Click on Add a New Value.

Favorites Main Menu	A UNIVERSITY  > Records and Enrollment > Transfer Credit Rules > Program/Source Equivalency	Home
Program/Source B	Fauivalenev	
Frogram/Source i	_quivalency	
Enter any information y	ou have and click Search. Leave fields blank for a list of all values.	
Find an Existing Valu	Add a New Value	
Search Criteria		
Academic Institution:	= V IUNWA Q	
Academic Program:	begins with 🗸	
Academic Plan:	begins with 🗸	
Source Institution:	begins with 🗸	
External Org ID:	begins with 🗸 0000025516	
Description:	begins with 🖌	
Include History	Correct History	
Limit the number of res	sults to (up to 300): 300	
Search Clear	Basic Search Eave Search Criteria	
No matching values we	ere found.	
Find an Existing Value	Add a New Value	

- Look up the Academic Program and select the first undergraduate degree program listed, which would have a "1" suffix such as BUS1. <u>DO not use Academic Plan or you'll have to add all the plans for each program</u>. NOTE: You can try to print the Academic Program list so you won't have to look it up each time.
- Type or paste in the Org ID number in the Source ID field.
- Click on Add.

INDIANA UNIVERSITY avorites Main Menu > Records and Enrollment > Transfer Credit Rules > Program/Source Equivalency	Home
rogram/Source Equivalency	
Eind an Existing Value Add a New Value	
Academic Program: BUSE1 Q Academic Plan:	
Credit Source Type: External Organization	
Add	
ind an Existing Value Add a New Value	

- Change the effective date to 08012003.
- Type Ancilla Co-BUSE1.
- Check that you've changed the Effective Date as it always comes up as the current date.
- Check that the information you typed in the Description field below the blue line matches the information given above the blue line.

nstitution:	IUNWA	Northwest			
Academic Program: Academic Plan:	BUSE1	Business & Econ Undergraduate	Ancilla College		
Source ID:	0000025516	Ancilla College			
			<u>Find</u> View All	First 🚺 1 of 1 🚺 Last	
Effective Date:	08/01/2003	*Status: Active V		+ -	
Description:	Ancilla Co-BUS	SE1			
Grading Scheme:		Undergraduate Grading Scheme			
Grading Basis:	TRN Q	Transfer Grading Basis			
Fransfer Grade:	Т	TRANSFERRED			
ransfer HS Courses:					

Click on the Rules Specification tab.

- The Rule Source Type field of \*Default will be highlighted.
- Type e and Ext Org should pop up.
- Tab, then type or paste in the Org ID number under the Rule Source ID section.
  - If the Org ID number turns red and is unable to be added, it means that the Institution is not active for that effective date. Either check the Organization Table for when it is active, or fill out the Rule Specification tab first and then go back to the Basic tab and then save.
- Tab again and the institution name should appear.
- Tab, then type All under the Course Equivalency Rule section. Tab again and the school's name should appear.

• Click Save.

asic Rules Specifi	cation					
cademic Institution:	IUNWA	Northwest				
cademic Program:	BUSE1	Business & Econ Undergr	aduate			
ource ID:	0000025516	Ancilla College				
			<u>Find</u>   View All	First 🚺 1 of 1 🖸 Las		
Effective Date:	08/01/2003			+ -		
Rule Source Type	R	ule Source ID	Course Equivalency Rule	)		
*Default: Ext C	)rg 🗸	0000025516 🔍	ALL			
		Ancilla College	Ancilla Co-ALL			
Override:	×	Q	Q			
Agreement:	~	Q	Q			
			Click to add more programs			
Save Q Return to	Search + Pre	vious in List ↓ Next in List	🕞 Add 🖉 Update/Display 🖉	Include History	Correct History	1
- Children in the					concornicity	ļ

- Click on Add at the bottom of the page.
- Now do the same thing for each of the remaining degree programs.

If you lose track of what you've already added, then go back to program/source search and you'll get a list of what's there. You can click on Add a New Value tab at the top or at the bottom of the page to add more programs. This list will always come up in alpha order even if you don't put it in that way.

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If you have any questions or concerns with this process, contact the UTO at <u>uto@iu.edu</u>.