



INDIANA UNIVERSITY

OFFICE OF THE EXECUTIVE VICE PRESIDENT FOR UNIVERSITY ACADEMIC AFFAIRS

University Transfer Office

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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.

The screenshot shows a web application titled "Look Up Source ID". It features several search filters, each with a "begins with" dropdown menu and an input field. The filters include: Source ID, Description, Organization Type, School Code, School Type, FICE Code, ATP Code, City, Country, and State. Below the filters are buttons for "Look Up", "Clear", "Cancel", and "Basic Lookup".

Under the "Search Results" section, a message states: "Only the first 300 results of a possible 75948 can be displayed." Below this is a table with the following columns: Source ID, Description, Organization Type, School Code, School Type, FICE Code, ATP Code, City, Country, and State. The table contains 7 rows of data.

Source ID	Description	Organization Type	School Code	School Type	FICE Code	ATP Code	City	Country	State
0000010001	Acadia University	SCHL	(blank)	COL	(blank)	0901	Wolfville	CAN	NS
0000010002	Accelerated Christian Educ	SCHL	(blank)	COL	(blank)	2347	Brendale M.D.C	AUS	(blank)
0000010003	Aga Khan University	SCHL	(blank)	COL	(blank)	1746	Karachi	PAK	(blank)
0000010004	Algoma University	SCHL	(blank)	COL	(blank)	0820	(blank)	CAN	(blank)
0000010005	Algonquin College	SCHL	(blank)	COL	(blank)	0172	Nepean	CAN	ON
0000010006	American Coll Greece Deree Col	SCHL	(blank)	COL	(blank)	0925	Athens	GRC	(blank)
0000010007	American Coll Higher Educ	SCHL	(blank)	COL	(blank)	2480	Dehiwela	LKA	(blank)

- 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 (uto@iu.edu).

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.

INDIANA UNIVERSITY Home Print Ac

Favorites | Main Menu > Campus Community > Organization > Create/Maintain Organizations > School Subject Maintenance

School Subject Maintenance

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 0000025516

Search Name: begins with

Organization Type: begins with

City: begins with

State: begins with

Country: begins with

Include History Correct History

Limit the number of results to (up to 300): 300

Search Clear Basic Search Save Search Criteria

- 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.

INDIANA UNIVERSITY Home Print

Favorites Main Menu > Campus Community > Organization > Create/Maintain Organizations > School Subject Maintenance

School Subject Maintenance

Org ID: 0000025516 Ancilla College

School Subject Find | View All First 2 of 69 Last

*School Subject:

School Subject Details Find First 1 of 1 Last

*Effective Date: 03/24/2015 *Status: Active

*Description:

Short Description:

*External Subject Area:

Save Return to Search Update/Display Include History Correct History

- It should look like the following:

INDIANA UNIVERSITY Home Print

Favorites Main Menu > Campus Community > Organization > Create/Maintain Organizations > School Subject Maintenance

School Subject Maintenance

Org ID: 0000025516 Ancilla College

School Subject Find | View All First 1 of 68 Last

*School Subject: AC

School Subject Details Find First 1 of 1 Last

*Effective Date: 01/01/1901 *Status: Active

*Description: Accounting

Short Description: AC

*External Subject Area: BUS Business

Save Return to Search Update/Display Include History Correct History

Save after data has been entered!

INDIANA UNIVERSITY 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.

Find an Existing Value

Search Criteria

External Org ID: begins with 0000025516

School Subject: begins with

Search Name: begins with

Include History Correct History

Limit the number of results to (up to 300): 300

Search Clear Basic Search Save Search Criteria

Search Results

View All First 1-68 of 68 Last

External Org ID	School Subject	Description	Search Name
0000025516	AC	Ancilla College	ANCILLACOLLEGE
0000025516	ACCT	Ancilla College	ANCILLACOLLEGE
0000025516	AR	Ancilla College	ANCILLACOLLEGE
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*.

INDIANA UNIVERSITY 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.

Find an Existing Value

Search Criteria

External Org ID: begins with

School Subject: begins with

Search Name: begins with

Include History Correct History

Limit 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!

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Home Print

Favorites Main Menu > Campus Community > Organization > Create/Maintain Organizations > School Course Classification

School Course Classification

Org ID: 0000025516 Ancilla College

School Subject: ACCT Accounting

School Course Number Find | View All First 1 of 2 Last

*School Course Number: 110

School Course Details Find First 1 of 1 Last

*Effective Date: 08/01/2003 *Status: Active

*Description: Financial Accounting

Short Description: Financial

*External Subject Area: BUS Business

*Career: Undergrad

External Course Type: Course Course Level: Freshman

External Units: 3.00

Save Return to Search Previous in List Next in List Update/Display Include History Correct History

Part 3: Creating the Rule

To create the rule you will use the following pages:

- Transfer Subject Area.
- Course Transfer Rules.
- 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.

Transfer Subject Area

Enter any information you have and click Search. Leave fields blank for a list of all values.

[Find an Existing Value](#) | [Add a New Value](#)

Search Criteria

Academic Institution:	begins with	<input type="text" value="IUNWA"/>	<input type="button" value="🔍"/>
Source ID:	begins with	<input type="text" value="0000025516"/>	<input type="button" value="🔍"/>
Component Subject Area:	begins with	<input type="text" value="AC"/>	<input type="button" value="🔍"/>
School Subject:	begins with	<input type="text"/>	<input type="button" value="🔍"/>
School Course Nbr:	begins with	<input type="text"/>	

Include History | **Correct History**

Limit the number of results to (up to 300):

| | [Basic Search](#) | [Save Search Criteria](#)

No matching values were found.

[Find an Existing Value](#) | [Add a New Value](#)

- 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.



Transfer Subject Area

Find an Existing Value

Add a New Value

Academic Institution:

IUNWA

Credit Source Type:

External Organization

Source ID:

0000025516

Component Subject Area:

AC

Add

[Find an Existing Value](#) | [Add 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 only if it's an Indiana public college.

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Favorites Main Menu > Records and Enrollment > Transfer Credit Rules > Transfer Subject Area

Transfer Subject Area Subject Area Elements

Academic Institution: IUNWA Northwest
 Source ID: 0000025516 Ancilla College
 Component Subject Area: AC

*Effective Date: 03/24/2016 *Status: Active TransferIN

Description:

Catalog Org Type: External
 Catalog Organization: 0000025516 Ancilla College

Component Defaults

Min / Max Units: 1.00 99.00 Term Type: Semester
 Min / Max Grade Pts per Unit: 1.000 99.000
 *Internal Equiv Course Value: Specify Fixed Units

Excess Credit Defaults

Course ID:
 Requirement Designation:

Save Add Update/Display Include History Correct History

Transfer Subject Area | Subject Area Elements

Filled page:

INDIANA UNIVERSITY Home Print

Favorites Main Menu > Records and Enrollment > Transfer Credit Rules > Transfer Subject Area

Transfer Subject Area Subject Area Elements

Academic Institution: IUNWA Northwest
 Source ID: 0000025516 Ancilla College
 Component Subject Area: AC

*Effective Date: 08/01/2003 *Status: Active TransferIN

Description: Accounting

Catalog Org Type: External
 Catalog Organization: 0000025516 Ancilla College

Component Defaults

Min / Max Units: 0.25 99.00 Term Type: Semester
 Min / Max Grade Pts per Unit: 2.000 99.000
 *Internal Equiv Course Value: Specify Fixed Units

Excess Credit Defaults

Course ID:
 Requirement Designation:

Save Add Update/Display Include History Correct History

Transfer Subject Area | Subject Area Elements

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.

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Home Print

Favorites Main Menu > Records and Enrollment > Transfer Credit Rules > Transfer Subject Area

Transfer Subject Area Subject Area Elements

Academic Institution: IUNWA Northwest
Source ID: 0000025516 Ancilla College
Component Subject Area: AC

Review History

Find | View All First 1 of 1 Last

Effective Date: 08/01/2003 Status: Active Term: 4036
Description: Accounting

Subject Area Elements Find | View All First 1 of 1 Last

*Sequence Number: 0001
*Description: Accounting
*Term Type: Semester
Transfer Course:
*Transfer Priority: 1
Contingent Credit:
*Internal Equiv Course Value: Specify Fixed Units
Save Excess Units to a Course:

Incoming Course Internal Equivalent

*Seq#: 1
Wildcard:
*Subject:
Course Number:
*Course ID:
*Offer Number:
Units: 0.00
*Default Grade: By Transfer Equivalency Setup

Incoming Course Information

Save Add Update/Display Include History Correct History

Transfer Subject Area | Subject Area Elements

- 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.

- 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.

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.

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

Course Transfer Rules

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value Add a New Value

Search Criteria

Academic Institution: begins with

Source ID: begins with

Equivalency Rule: begins with

Include History Correct History

Limit the number of results to (up to 300):

[Basic Search](#)

No matching values were found.

Find an Existing Value

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

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

Source ID: 0000025516

Equivalency Rule:

[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.

Course Transfer Rules

Find | View All | First | 1 of 1 | Last

Academic Institution: IUNWA Northwest [+ -]
Source ID: 0000025516 Ancilla College
Equivalency Rule: ALL
*Effective Date: 08/01/2003 [it] *Status: Active
*Description: Ancilla Co-ALL

Transfer Subject Area Find | First | 1-22 of 22 | Last

+ -	AR	Art
+ -		
+ -		
+ -	CA	Communication
+ -	CH	Chemistry
+ -	COMM	Communication
+ -	CS	Computer Science
+ -	EN	English
+ -	ENGL	English

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.

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[Favorites](#) |
 [Main Menu](#) >
 [Records and Enrollment](#) >
 [Transfer Credit Rules](#) >
 [Program/Source Equivalency](#)

Program/Source Equivalency

Enter any information you have and click Search. Leave fields blank for a list of all values.

[Find an Existing Value](#) |
 [Add a New Value](#)

Search Criteria

Academic Institution: =

Academic Program: begins with

Academic Plan: begins with

Source Institution: begins with

External Org ID: begins with

Description: begins with

Include History |
 Correct History

Limit the number of results to (up to 300):

|
 |
 [Basic Search](#) |

No matching values were 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. DO not use Academic Plan or you'll have to add all the plans for each program. 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.

Program/Source Equivalency

Find an Existing Value

Add a New Value

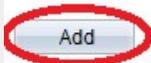
Academic Institution: 

Academic Program: 

Academic Plan: 

Credit Source Type: 

Source ID: 



[Find 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.

INDIANA UNIVERSITY Home Print Add

Favorites Main Menu > Records and Enrollment > Transfer Credit Rules > Program/Source Equivalency

Basic **Rules Specification**

Institution: IUNWA Northwest
 Academic Program: BUSE1 Business & Econ Undergraduate Ancilla College
 Academic Plan:
 Source ID: 0000025516 Ancilla College

*Effective Date: 08/01/2003 *Status: Active
 *Description: Ancilla Co-BUSE1
 *Grading Scheme: UGD Undergraduate Grading Scheme
 *Grading Basis: TRN Transfer Grading Basis
 *Transfer Grade: T TRANSFERRED
 Transfer HS Courses:

Save Return to Search Previous in List Next in List Add Update/Display Include History Correct History

Basic | [Rules Specification](#)

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.

INDIANA UNIVERSITY

Home Print Add to Favorites

Main Menu > Records and Enrollment > Transfer Credit Rules > Program/Source Equivalency

Basic Rules Specification

Academic Institution: IUNWA Northwest
 Academic Program: BUSE1 Business & Econ Undergraduate
 Academic Plan:
 Source ID: 0000025516 Ancilla College

Effective Date: 08/01/2003

Rule Source Type	Rule Source ID	Course Equivalency Rule
*Default: Ext Org	0000025516 Ancilla College	ALL Ancilla Co-ALL
Override:		
Agreement:		

Click to add more programs

Save Return to Search Previous in List Next in List Add Update/Display Include History Correct History

Basic | Rules Specification

- 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.

Program/Source Equivalency

Enter any information you have and click Search. Leave fields blank for a list of all values.

[Find an Existing Value](#) [Add a New Value](#)

Search Criteria

Academic Institution: = 

Academic Program: begins with 

Academic Plan: begins with 

Source Institution: begins with 

External Org ID: begins with 

Description: begins with

Include History Correct History

Limit the number of results to (up to 300):

[Search](#) [Clear](#) [Basic Search](#)  [Save Search Criteria](#)

Search Results

View All First 1-25 of 25 Last

Academic Institution	Academic Program	Academic Plan	Source ID	Description
IUNWA	AHLT0	(blank)	0000025516	Ancilla Co-AHLT0
IUNWA	AHLT1	(blank)	0000025516	Ancilla Co-AHLT1
IUNWA	BUSE0	(blank)	0000025516	Ancilla Co-BUSE0
IUNWA	BUSE1	(blank)	0000025516	Ancilla Co-BUSE1
IUNWA	COAS0	(blank)	0000025516	Ancilla Co-COAS0
IUNWA	COAS1	(blank)	0000025516	Ancilla Co-COAS1
IUNWA	DAED0	(blank)	0000025516	Ancilla Co-DAED0
IUNWA	DAED1	(blank)	0000025516	Ancilla Co-DAED1
IUNWA	EDUC0	(blank)	0000025516	Ancilla Co-EDUC0
IUNWA	EDUC1	(blank)	0000025516	Ancilla Co-EDUC1
IUNWA	CSB1	(blank)	0000025516	Ancilla Co-CSB1

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