Transfer Credit Set Up

Purpose: The following instructions describe how to set up transfer courses (School Subjects). Prior to creating a new transfer course, these three tasks must be completed:
1. Add the External Org if it is not already in the Organization table. **Main Menu > Campus Community > Organization > Create/Maintain Organization > Organization Table**
2. Set up External Terms if you have a school with a different term structure. **Main Menu > Set Up SACR > Common Definitions > External Education > External Term**
3. Set Up External Subjects if UNI adds a new subject. **Main Menu > Set Up SACR > Common Definitions > External Education > External Subjects**

Build School Subjects
There is a distinct list of external subject codes for each external organization. The following instructions describe how to build external school subjects.

Step	Action
1.	Navigate to the **School Subject Maintenance** page: **Main Menu › Set Up SACR > Common Definitions > External Education > School Subject Maintenance**
2.	Enter the appropriate search criteria for the school for which you wish to build the school subject. Click the **Search** button. *Note:* If you don't know the exact External Org ID or Name, leave the criteria bland and click the **Search** button. You may then select from the results.

Step	Action
3.	Select the subject you wish to build. Use the **Add New Row** button ➕ to build additional subjects. **School Subject Maintenance** Org ID: 600007 Auburn University *School Subject:* _____ 🔍 School Subject Details *Effective Date: 08/13/2012 *Status: Active *Description: Short Description: *External Subject Area: _____ 🔍
4.	Complete the *School Subject Details*: • **Effective Date** – Defaults to today's date, change to 01/01/1901 • **Status** – Defaults to **Active**, do not change • **Description** – Enter the appropriate free text description 9this is the Ext Org's Dept Name) • **External Subject Area** – Select as appropriate *Example:* **School Subject Maintenance** Org ID: 600007 Auburn University *School Subject: ACCT 🔍 Accounting School Subject Details *Effective Date: 01/01/1901 *Status: Active *Description: Accounting Short Description: Accounting *External Subject Area: ACCT 🔍 Click the **Save** button. 💾 Save *Note:* To add another School Subject, use the **Add New Row** button ➕ in the School Subject section.

Build Individual Courses

There are individual courses for each subject. This is like building a course catalog for other colleges. The following instructions describe how to build individual courses.
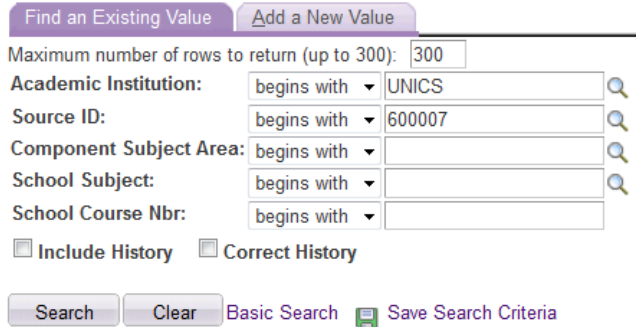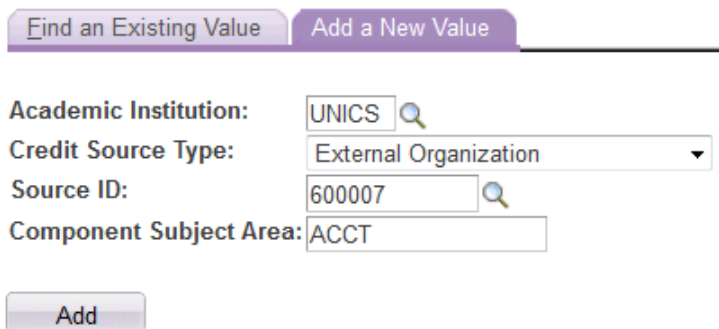
Step	Action
1.	Navigate to the **School Subject Maintenance** page: **Main Menu › Set Up SACR > Common Definitions > External Education > School Course Classification** Favorites ∣ Main Menu > Set Up SACR > Common Definitions > External Education > School Course Classification **School Course Classification** Enter any information you have and click Search. Leave fields blank for a list of all values. Find an Existing Value Maximum number of rows to return (up to 300): 300 **External Org ID:** begins with ⌄ **School Subject:** begins with ⌄ **Search Name:** begins with ⌄ ☐ Include History ☐ Correct History Search Clear Basic Search 💾 Save Search Criteria
2.	Enter the appropriate search criteria for the school for which you wish to build the individual courses. Click the **Search** button. *Result:* The School Course Classification page displays. **School Course Classification** **Org ID:** 600007 Auburn University **School Subject:** ACCT Accounting School Course Number Find ∣ View All First ◀ 1 of 1 ▶ Last *School Course Number: [ ] ➕ ➖ School Course Details Find First ◀ 1 of 1 ▶ Last *Effective Date: 01/01/1901 📅 *Status: Active ⌄ ➕ ➖ *Description: [ ] Short Description: [ ] *External Subject Area: ACCT 🔍 Accounting *Career: Undergrad ⌄ External Course Type: [ ] Course Level: [ ] External Units: [ ] 💾 Save 🔍 Return to Search 📧 Notify 📄 Update/Display 📄 Include History 📝 Correct History
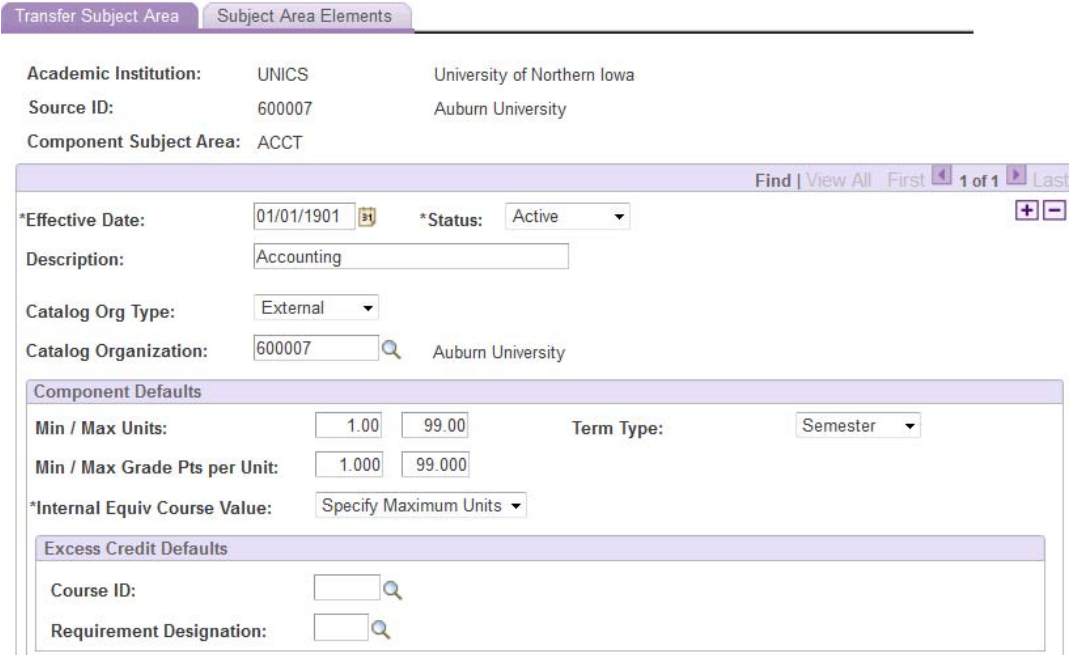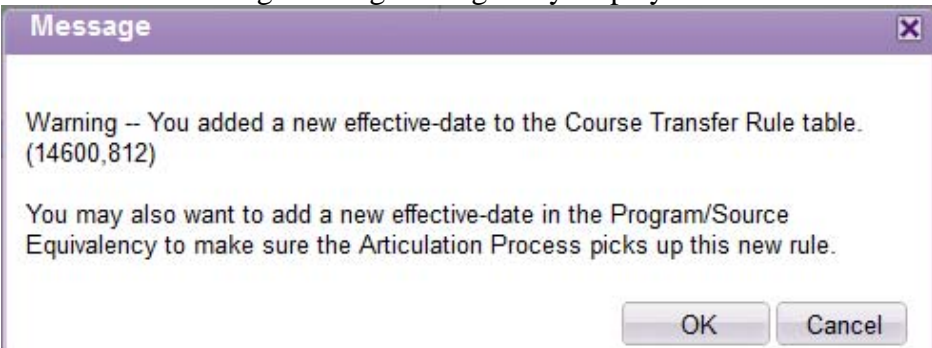
Step	Action
3.	Complete the *School Course Details*: • **School Course Number –** Enter the number associated with the course • **Effective Date –** Defaults to today's date, change to 01/10/1901 • **Status** – Defaults to *Active,* leave as is • **Description –** Enter the appropriate free text description (Course Name) • **Short Description –** Use upper/lower case to your advantage and abbreviate so it makes some kind of sense • **External Subject Area –** Select as appropriate • **Career –** Select • **External Course Type –** Select *Course* • **Course Level –** Select if appropriate • **External Units –** Enter as appropriate *Example:* Click the **Save** button. *Note:* To add another School Course, use the **Add New Row** button in the School Course Number section.
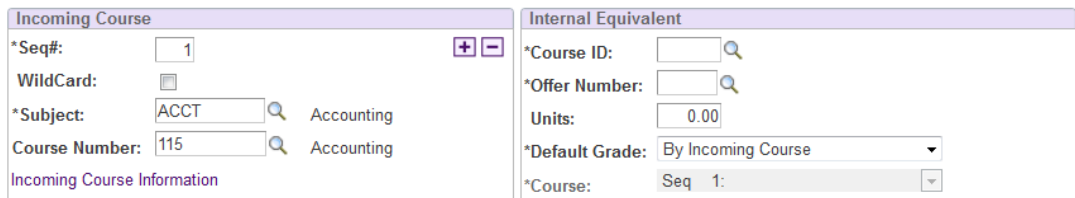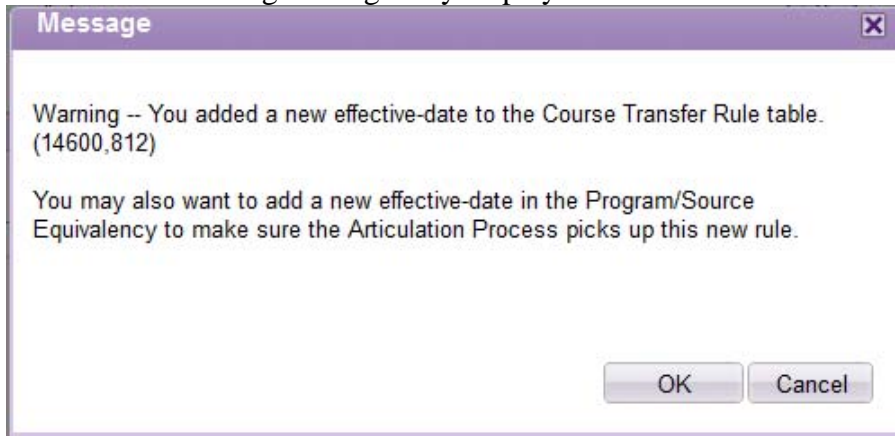
Build "One to One" Rules

One to one rules are built to tie the incoming course to our internal course.

Step	Action
1.	Navigate to the **School Subject Maintenance** page: **Main Menu › Records and Enrollment > Transfer Credit Rules > Transfer Subject Area** Favorites | Main Menu > Records and Enrollment > Transfer Credit Rules > Transfer Subject Area **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 Maximum number of rows to return (up to 300): 300 **Academic Institution:** begins with **Source ID:** begins with **Component Subject Area:** begins with **School Subject:** begins with **School Course Nbr:** begins with ☐ Include History ☐ Correct History Search Clear Basic Search Save Search Criteria

Step	Action	
2.	**If you wish to…**	**Then…**
	View subjects already entered	Use the *Find an Existing Value* tab, enter or select the Source ID (School) and click the **Search** button. Find an Existing Value | Add a New Value Maximum number of rows to return (up to 300): 300 **Academic Institution:** begins with ▾ UNICS 🔍 **Source ID:** begins with ▾ 600007 🔍 **Component Subject Area:** begins with ▾ 🔍 **School Subject:** begins with ▾ 🔍 **School Course Nbr:** begins with ▾ ☐ Include History ☐ Correct History Search | Clear | Basic Search | 💾 Save Search Criteria *Result:* Any existing subjects will display. Click the subject to view details.
	Add a new subject	Use the *Add New Value* tab, complete: • **Academic Institution** – Enter or select UNICS • **Credit Source Type** – Select External Organization • **Source ID** – Enter or select the desired school • **Component Subject Area** – Enter as appropriate Click the **Add** button. Find an Existing Value | Add a New Value **Academic Institution:** UNICS 🔍 **Credit Source Type:** External Organization ▾ **Source ID:** 600007 🔍 **Component Subject Area:** ACCT Add

Step	Action
3.	For new subjects, on the **Transfer Subject Area** tab, complete the following: • **Effective Date –** Change to 01/01/1901 • **Status** – Defaults to *Active,* leave as is • **Description –** Enter the appropriate free text description (Course Name) • **Catalog Org Type –** Defaults to *External*, leave as is • **Catalog Organization –** Defaults based on the *Source ID* selected • **Min/Max Units –** Must be 0.01 and 99.00 respectively • **Min/Max Grade Pts per Units –** Must be 0.000 and 99.000 respectively • **Internal Equiv Course Value –** Select *Specify Maximum Units* *Example:* Click the **Save** button. *Note:* The following warning message may display:

Step	Action
4.	Select the *Subject Area Elements* tab. Complete the following: Incoming Course (pulls data from the School Course Classification): • **Seq#** – Defaults to 1 • **WildCard** – Leave blank • **Subject** – Enter or select (you will see all the subjects for this school) • **Course Number** – Enter or select (you will see all the courses in that subject for that school) Internal Equivalent (pulls data from the UNI Course Catalog): • **Course ID** – Enter or to find, type in any letter and then click the look-up icon. Click the Clear button, enter the appropriate UNI Subject Area, click the look-up icon to see all UNI courses starting with that subject. Select the appropriate UNI course equivalent. • **Offer Number** – DO NOT CHANGE • **Units** – DO NOT CHANGE • **Default Grade** – Change to *By Incoming Course* *Example:* Click the **Save** button. *Note:* The following message may display:

Specific External Orgs Subjects to build Rules upon
Course transfer rules must be added for all subjects from this External Org.
Note: A subject cannot be added to this table if there are not any equivalents entered in the Transfer Subject Area (step: Build One to One Rules)

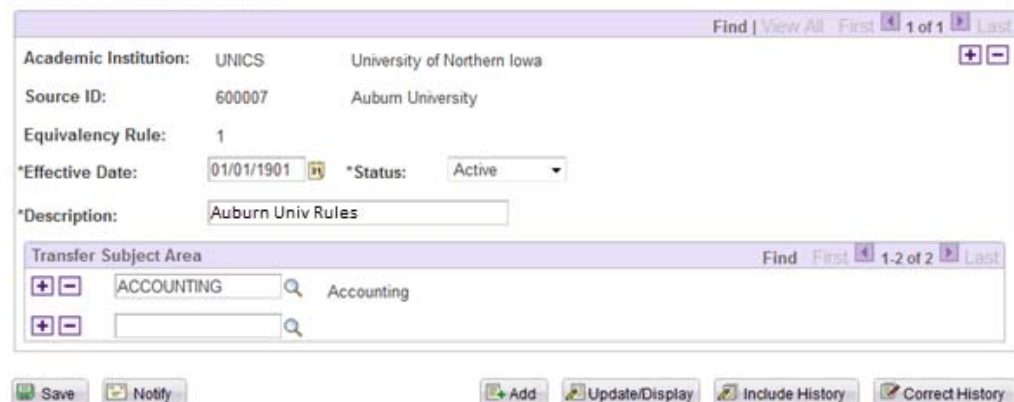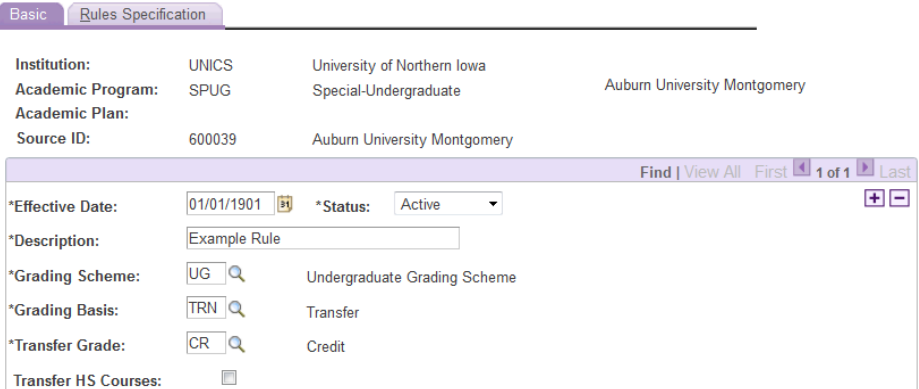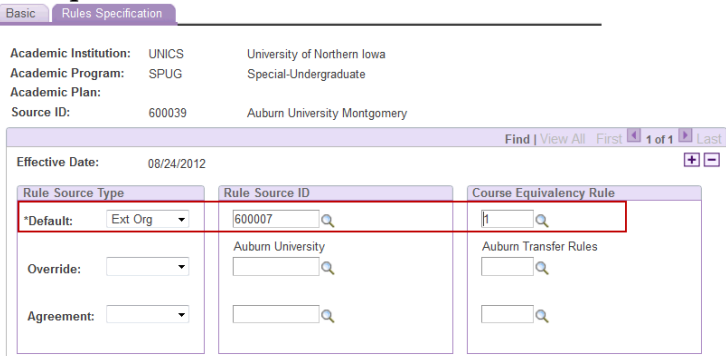| Step	Action
1.	Navigate to the **School Subject Maintenance** page: **Main Menu › Records and Enrollment > Transfer Credit Rules > Course Transfer Rules** Favorites | Main Menu > Records and Enrollment > Transfer Credit Rules > Course Transfer Rules **Course Transfer Rules** Find an Existing Value | Add a New Value Academic Institution: UNICS Credit Source Type: External Organization Source ID: Equivalency Rule: Add
2.	Enter or select the **Source ID** (School) and the **Equivalency Rule** (e.g. 1)
3.	Complete the *School Subject Detail (Repeats External Orgs Subjects)*: • **Effective Date** – Defaults to today's date, change to 01/01/1901 • **Status** – Defaults to **Active**, do not change • **Description** – Enter the appropriate free text description • **Transfer Subject Area** – Select as appropriate. Use the **Add Row** button to enter additional transfer subject areas *Example:* **Course Transfer Rules** Find | View All First ◀ 1 of 1 ▶ Last Academic Institution: UNICS University of Northern Iowa Source ID: 600007 Auburn University Equivalency Rule: 1 *Effective Date: 01/01/1901 *Status: Active *Description: Auburn Univ Rules Transfer Subject Area Find First ◀ 1-2 of 2 ▶ Last + − ACCOUNTING Accounting + − Save Notify Add Update/Display Include History Correct History

Program/Source Equivalencies
Program/Source Equivalencies are used to apply rules to specific UNI programs.
Note: If rules are not applied to a student's program, you cannot post credit to their record.

Step	Action
1.	Navigate to the **School Subject Maintenance** page: **Main Menu › Records and Enrollment > Transfer Credit Rules > Program/Source Equivalency** 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 Maximum number of rows to return (up to 300): 300 Academic Institution: = ▾ UNICS Academic Program: begins with ▾ Academic Plan: begins with ▾ Source Institution: begins with ▾ External Org ID: begins with ▾ Description: begins with ▾ ☐ Include History ☐ Correct History ☐ Case Sensitive Search Clear Basic Search 💾 Save Search Criteria
2.	To view existing rules, enter the source ID (School ID) in the **Source Institution** field and click the **Search** button.

Step	Action
3.	To add a new rule, select the **Add a New Value** tab. Complete the following: • **Academic Institution** - UNICS • **Academic Program** – Select or Enter UNI's Program (see UNI Program Table) • **Academic Plan** – DO NOT USE • **Credit Source Type** – Select *External Organization* • **Source ID** – Enter or Select the appropriate External Org Code Click the **Add** button. *Example:* **Program/Source Equivalency** Find an Existing Value | Add a New Value Academic Institution: UNICS Academic Program: SPUG Academic Plan: Credit Source Type: External Organization Source ID: 600039 Add

Step	Action
4.	Complete the following: Basic tab: • **Effective Date** – Defaults to today's date, change to 01/01/1901 • **Status** – Defaults to **Active**, do not change • **Description** – Enter the appropriate free text description • **Grading Scheme** – Select or Enter *UG* for Undergrad or *GR* for Graduate • **Transfer Grade** – CR (Credit) • **Transfer HS Courses checkbox** – DO NOT CHECK *Example:* Rules Specification tab: ONLY ENTER INFORMATION IN THE "DEFAULT" LINE • **Rule Source Type** – Select External Org • **Rule Source ID** – Select the External Org for the school you are adding • **Course Equivalency Rule** – Select the appropriate code *Example:*
5.	Click the **Save** button. Repeat for all UNI Undergraduate Active Programs