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Revision History

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<td>November 2015</td>
<td>New version that supports Degree Works 4.1.5 software.</td>
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Overview

Transfer Equivalency Self-Service is a tool used outside of the standard Degree Works interface to allow students who are considering transferring to your school to see how their transfer classes might articulate and apply to a degree at your institution.

Students accomplish this using a very simple set of steps:

- Choose an intended degree and major and entering academic year
- Choose a transfer school
- Select the classes taken at the transfer school
- Enter the grade, credits, and term for each transfer class
- Process to see the articulation and degree audit

Note: As of the 4.1.1 release, “TreQ” is now known as “Degree Works Transfer Equivalency”, “TreQadmin” is now known as “Transfer Equivalency Admin”, and “WebTreQer” is now known as “Transfer Equivalency Self-Service”.

This document details the settings that are associated with Transfer Equivalency Self-Service screens and screen elements, and is meant for Transfer Equivalency Self-Service system administrators who need to modify or localize the application’s screens.
Modifying Transfer Equivalency Self-Service

Transfer Equivalency Self-Service's screens are highly localizable. Changes can be carried out using the Shepentry application or by modifying the `.properties` file.

Modifications using the Shepentry application

Modifications for your site can be made by modifying the SHP_SETTINGS_MST table. This is accomplished by using the **System Settings** menu in the Shepentry application to set the value appropriately in the selected setting.

Details for different settings are described throughout the sections of this document. See the **Shepentry User Guide** for information on using Shepentry to modify system settings.
Modifying the .properties file

Most of the titles, headings, text boxes, and messages in Transfer Equivalency Self-Service can be changed by modifying the WEB-INF\classes\WebtreqerMessages.properties file from the directory where the .war file gets deployed.

**Note:** It is recommended that you save a copy of this file, to overwrite it after an update.

The following is a partial sample of that file:

```properties
# Transfer Equivalency Self-Service resource bundle

# Error page messages
errorPage.title=Error 500: Application Error
errorPage.errorMessage=An Error has occurred that is preventing this process from completing.
errorPage.moreInfo=Please contact a system administrator regarding this error:
classicConnector.error=Could not retrieve data from the DegreeWorks sockets server: Please check connection configuration and/or restart DegreeWorks sockets server

treqer.title=Transfer Equivalency Self-Service
treqer.institution=ELLUCIAN UNIVERSITY
treqer.landingPage.title=Welcome to Transfer Equivalency Self-Service
treqer.landingPage.moreInformationTitle=What to Do
treqer.landingPage.moreInformationText=Use this site to see how the academic credits you have earned at other institutions can be used to earn a degree at <b>Ellucian University</b>. All you have to do is answer a few questions (Page 1), tell us what classes you took and where you took them (Page 2), and we will tell you how the coursework will apply towards the degree you select (an articulation report on Page 3 and a degree audit on Page 4). At the end, we will give you some options about what you might do next (Page 5).<br/>You can be anonymous, or create an account to save your work. If you need assistance, try the Help button.
```
Modifying Text

To modify text on Transfer Equivalency Self-Service screens, locate and edit the WebtreqerMessages.properties file. The file is present in the degreeworks-WebTreQer-n.n.n.n.war (where 'n.n.n' is the release number, for example, degreeworks-WebTreQer-4.1.1.war) that you downloaded with the Degree Works installation file package and deployed.

1. Open the .war file for your deployment using a file compression tool such as WinZip or 7-Zip, navigate to the WEB-INF\classes\ folder and extract the WebtreqerMessages.properties file.

2. Use an editor such as Notepad to edit the file and make the required text changes.

For example, to change the default college name that is displayed, locate the treqer.institution=Ellucian University entry on the file and change ‘Ellucian University’ to the name of your college.

3. Save the file once you complete all the text changes and place it back in the .war file archive.

   **Note:** For UNIX environments, the war file needs to be re-packaged.

4. Restart the server on which the application is running and clear your browser cache before re-starting Transfer Equivalency Self-Service.

   All the text changes will be displayed on the application screens.

   **Important:** You need to make these text changes each time you upgrade to a new version of Transfer Equivalency Self-Service.
Modifying Images

You can replace some of the default images on the Transfer Equivalency Self-Service with new ones specific to your installation. Images are administered through Shepherd settings and these settings are accessed and modified using Shepentry.

The default directory for images is specified in the `treq.webtreqer.images.directory` Shepherd setting. To change the default directory to one that contains the new images you want to use, access and modify this setting to point to your images directory, using the **System Settings** menu option in Shepentry.

The following Shepherd settings, in Shepentry can be modified to change the associated images:

- `treq.webtreqer.images.articulationNoGood`
- `treq.webtreqer.images.articulationOk`
- `treq.webtreqer.images.completeIcon`
- `treq.webtreqer.images.confirmIcon`
- `treq.webtreqer.images.footerLogo`
- `treq.webtreqer.images.helpIcon`
- `treq.webtreqer.images.logo`
- `treq.webtreqer.images.nextIcon`
- `treq.webtreqer.images.previousIcon`
- `treq.webtreqer.images.saveIcon`

The following table illustrates two examples of the default images that are used for the **Next** and **Previous** buttons on the Transfer Equivalency Self-Service interface:

<table>
<thead>
<tr>
<th>Shepherd Setting</th>
<th>Spec</th>
<th>Value</th>
<th>Image</th>
</tr>
</thead>
<tbody>
<tr>
<td><code>treq.webtreqer.images.nextIcon</code></td>
<td>default</td>
<td>round_right_arrow.png</td>
<td><img src="round_right_arrow.png" alt="Next" /></td>
</tr>
<tr>
<td><code>treq.webtreqer.images.previousIcon</code></td>
<td>default</td>
<td>round_left_arrow.png</td>
<td><img src="round_left_arrow.png" alt="Previous" /></td>
</tr>
</tbody>
</table>

To use a custom image instead of the default image, you have to modify the applicable Shepherd setting to change the name of the default image to the name of the image that you want to use, and add the new image file in the specified images directory. If the Value is left empty in the setting, the
default image is used. Restart the server on which the application is running and clear your browser cache before re-starting Transfer Equivalency Self-Service, to see the new images.

Modifying Navigation Elements

This section lists the Shepherd settings associated with some of the navigation elements on Transfer Equivalency screens, and provides details on how they can be modified.

Create logon button

Using Shepentry to set the value to true in the following setting will display the Would you like to create a logon now button and sign in box on the Transfer Equivalency Self-Service landing page, as well as the Save button on other pages:

treq.webtreger.enablePersistence

Start Over button

Clicking on the Start Over button will reset the user’s session. They will be returned to page 1 and have the opportunity to make changes to their original degree goal responses.

- If they are using Transfer Equivalency Self-Service as a guest, their responses to the degree goal questions will be reset to the initial values.
- If they are logged in, their responses to these questions from their last save will display.

You can control whether or not to allow the start over functionality. Using Shepentry to set the following value to true will display the Start Over button and allow this functionality:

treq.webtreger.enableStartOver
Help button

Clicking on the Help button will access the help file for Transfer Equivalency Self-Service.

You can change the URL where Transfer Equivalency Self-Service points by using Shepentry to update the following Shepherd setting:

```
treq.webtreger.helpUrl
```

**Note:** If setting an external URL, use the full URL, for example, `http://www.<website>.com`.

Print Page button

Clicking on the Print Page button will print a screenshot of the user’s current page to a local printer.

**Note:** For pages that may scroll longer than your browser window, you can use the Show Results option on page 5 to generate a complete report of your work in Transfer Equivalency Self-Service.

You can control whether or not to allow the print page functionality. Using Shepentry to set the value to `true` in the following setting will display the Print Page button and allow this functionality:

```
treq.webtreger.enablePrintPage
```

Browser “back” button

As is common for Adobe Flash based applications, Transfer Equivalency Self-Service behaves as a single Web Page. Therefore the normal behavior of the browser’s “back” button is to exit Transfer Equivalency Self-Service and navigate to the previous page – which can cause a problem if the user has not saved data. The following system setting will enable Transfer Equivalency Self-Service to prompt users when they click the back button, asking them if they want to exit Transfer Equivalency Self-Service:

```
treq.webtreger.enableBackButtonWarning
```
Screen Modifications

This section lists the Shepherd settings associated with the Transfer Equivalency Self-Service screens or pages and provides details on how they can be modified.

Creating a logon and saving data

Users can create a login and save the transfer course data they entered. On the landing page, the user should click on the Would you like to create a login now? Button. Then the user can enter their e-mail address, name, and desired password in the appropriate fields before saving the information. The next time they visit Transfer Equivalency Self-Service, they can login with their e-mail address and password, and resume their work.
Modifying the Login page

You can control whether or not to allow users to create a logon and save data. Using Shepentry to set the value to “true” in the following setting will display the **Would you like to create a logon now** button and sign in box on the Transfer Equivalency Self-Service landing page, as well as the **Save** button on other pages:

```
treq.webtreqer.enablePersistence
```

Defining goal data

To get started, users provide some information about their degree goals by answering questions about their intended enrollment term, degree, major, level, and other information; making selections from the drop-down lists. Questions that are mandatory are designated with an * and the user will not be allowed to proceed until they select an answer from the drop-down list. Once they have completed their selections, users click on the **Next** button in the lower right to proceed to page 2. If any required fields have been missed, an error message box will be displayed and the drop-down box will be highlighted in red.

Transfer Equivalency Self-Service can be configured to use curriculum rules to filter the goal data drop down lists. Additionally, which goal data can be used for filtering, required goal data and other behavior can be configured. If Transfer Equivalency Self-Service is not configured to use curriculum rules for filtering, the goal data drop down lists will contain all values from the associated UCX table.

Modifying the goal data page

Using Standard UCX Filtering

When the **core.whatIf.enableCurriculumRules** setting is false, standard UCX filtering will be used on the goal data page. The values that appear in the drop-down lists are controlled by flag settings in the corresponding UCX tables.

- Set the UCX-STU016 **WebTreQer** flag to “Y” if you want the term to show up in the transfer classes screen, “Q” if you want the term to show up in the Questions screen or “B” if you want to see it on both screens.
- Set the UCX-STU035 **WebTreQer** flag to “Y” for each catalog year related to the terms enabled in UCX-STU016.
- Set the UCX-STU350 **Show in WebTreQer** flag to “Y” for each school or level that should appear in the drop-down list.
- Set the UCX-STU307 **Show in WebTreQer** flag to “Y” for each degree that should appear in the drop-down list.
- Set the UCX-STU023 **Show in WebTreQer** flag to “Y” for each major that should appear in the drop-down list.
- Set the UCX-STU024 **Show in WebTreQer** flag to “Y” for each minor that should appear in the drop-down list.
- Set the UCX-STU563 **Show in WebTreQer** flag to “Y” for each concentration that should appear in the drop-down list.
- Set the UCX-STU560 **Show in WebTreQer** flag to “Y” for each college that should appear in the drop-down list.
- Set the UCX-STU316 **Show in WebTreQer** flag to “Y” for each program that should appear in the drop-down list.

**Note:** If you do not set at least one value in each of these tables to show in Transfer Equivalency Self-Service, the drop-down list will be empty and Transfer Equivalency Self-Service will not generate accurate results.

This screen can be configured to filter the majors that appear in the drop-down list, based on the degree selected by the user. This is done using the Transfer Equivalency Self-Service Degree Filter fields in UCX-STU023. UCX-STU023 populates the major drop-down list differently based on a Shepherd Setting. Set the following Shepherd setting to **true** to combine the degree and major drop-down lists:

treq.webtreger.degreeMajorFilter
Displaying or hiding questions

The questions on the goal data page can be configured to be displayed or hidden. The mandatory questions are always displayed; an administrator can configure the system to hide one or more of the other questions from the user.

1. To start, please answer the following questions

   - What is your intended Degree?*
     - Select a degree
   - What is your intended Major?*
     - Select a major
   - What is your intended Level?*
     - Select a level
   - What is your intended College?
     - Select a college
   - When do you plan to enroll?*
     - Select the term in which you plan to enroll
   - What is your intended Minor?
     - Select a minor
   - What is your intended Concentration?
     - Select a concentration
   - Do you have an AA degree?
     - Yes

By changing the value to true in the following setting, the Do you have an AA degree? question will display:

treq.webtreqer.questions.degreeQuestion.show

Note: The Do you have an AA degree? question is not required to run an audit, but the value selected by the user as the response to this question is displayed in the audit report.

By changing the value to true in the following setting, the What is your intended Minor? question will display:

treq.webtreqer.questions.intendedMinorQuestion.show

By changing the value to true in the following setting, the What is your intended Concentration? question will display:

treq.webtreqer.questions.concentration.show

By changing the value to true in the following setting, the What is your intended College? question will display:

treq.webtreqer.questions.college.show
By changing the value to \textit{true} in the following setting, the \textbf{What is your intended Program?} question will display:

\texttt{treq.webtreger.questions.program.show}

By changing the value to \textit{false} in the settings, the corresponding question does not display. In the following screen shot, the \texttt{treq.webtreger.questions.degreeQuestion.show} value has been set to \textit{false}, so the \textbf{Do you have an AA degree?} question does not display:

\begin{itemize}
\item \textbf{What is your intended Degree?}*
\item \textbf{What is your intended Major?}*
\item \textbf{What is your intended Minor?}
\item \textbf{What is your intended Program?}
\item \textbf{When do you plan to enroll?}*
\item \textbf{What is your intended Level?}*
\item \textbf{What is your intended Concentration?}
\item \textbf{What is your intended College?}
\end{itemize}

\textbf{Using Curriculum Rule Filtering}

When the \texttt{core.whatIf.enableCurriculumRules} setting is true, curriculum rule filtering will be used on the goal data page. The values that appear in the drop-down lists will come from the curriculum rules loaded in \texttt{rad_currrule_dtl}. When curriculum rule filtering is enabled, the Term and Degree choices will always display. Campus, Program, Level, College, Major, Concentration and Minor can be configured to display with these settings:

\texttt{core.whatIf.showCampus}
\texttt{core.whatIf.showProgramPrimary}
\texttt{core.whatIf.showSchool}
\texttt{core.whatIf.showCollege}
\texttt{core.whatIf.degreeBeforeCollege}
\texttt{core.whatIf.showConcentration}
\texttt{core.whatIf.concTiedToMajor}
\texttt{core.whatIf.showAllConcsInPrimary}
\texttt{core.whatIf.showMinor}
\texttt{core.whatIf.showAllMinors}
The **Term** will always be displayed and is a required field. The Terms that are in the dropdown come from the codes in STU016 with *Show in WebTreQer* flag = Q or B.

If configured to display, the **Campus** will be a required field. The values in the **Campus** drop down list will only be those from STU576 that are on the curriculum rule.

If configured to display, the **School** will be a required field. The values in the **School** drop down list will only be those from STU350 with *Show in What-If* flag = Y or blank, that are on the selected curriculum rule.

If configured to display, the **College** will be a required field. The values in the **College** drop down list will only be those from STU560 with *Show in What-If* flag = Y or blank, that are on the selected curriculum rule. If the **College** is configured to display before the **Degree**, College will drive the Degree in the curriculum rule filtering.

The **Degree** will always display and is a required field. The values in the **Degree** drop down list will only be those from STU307 with *Show in What-If* flag = Y or blank, that are on the selected curriculum rule. If the **Degree** is configured to display before the **College**, Degree will drive the College in the curriculum rule filtering.

If the **Program** is configured to display, it will be a required field and the **Level**, **Degree**, and **College** (if displayed) will be inactive. The values in the **Program** drop down list will only be those from STU316 with *Show in What-If* flag = Y or blank, that are on the selected curriculum rule.

The **Major** may be configured to display, and can also be configured to be a required item. The values in the **Major** drop down list will only be those from AUD027 that are on the curriculum rule.

The **Concentration** may be configured to display, and will be required if the selected major has AUD027 **Concentration Required** = Y. The values in the **Concentration** drop down list will only be those from STU563 with *Show in What-If* flag = Y or blank, that are on the curriculum rule. Additional configuration will require that the Concentration be tied to a specific major. If showing all concentrations on a rule or major is enabled, all STU563 values with *Show in What-If* flag = Y or blank will be displayed.

The **Minor** may be configured to display and will be an optional field. The values in the **Minor** drop down list will only be those from AUD029 that are on the curriculum rule. If showing all minors on a rule is enabled, all AUD029 values will be displayed.
Choosing a transfer school

On page 2, users will select their transfer institution from the list on the left by either scrolling through the list or typing all or part of the institution’s name or city in the filter box. Schools are listed in alphabetical order by school and can be sorted by city and state by clicking on the column header. The most common transfer institutions will display initially. Clicking on the All Schools bar will show a list of all transfer institutions.

The list of transfer schools in the list on the left is populated from two different sources:

1. Your local feeder schools defined in UCX-TRQ060 appear under Popular Schools.
2. Those schools for which you have mappings in the dap-mapping-dtl appear under all schools.

The school name for the list of Popular Schools is pulled from UCX-TRQ060. The school names for the other schools are pulled from the rad-ets-mst. City and state information comes from the rad-ets-mst, if this record exists.
Setup notes:

It is important that all schools appearing in this list have their calendar type specified in UCX-TRQ060 or have the rad-ets-mst rad-calendar field populated.

- For Banner customers this field is populated from the SORBTAG_CALC_CODE field when “bannereextract ets” is run – so ensure that this field is populated in Banner.

- For Colleague customers this field is populated from the INSTITUTIONS.INST_ACAD_CALENDAR when “colleagueextract ets” is run.

- For Oracle PeopleSoft customers this field is not extracted.

- For others schools, ensure that you bridge this on your R701ETSM bridge record.
Viewing transfer courses

Users can double-click on the school name or click the Select button to view a list of available course articulations. Courses are grouped by course discipline, and clicking on the ▶ to the left of the discipline will expand the course list.
Double-clicking on the course or clicking on the Select button will take the user to the course details screen. The user should enter the grade and credits received, which term the course was taken and the calendar type of the credits, and then click on the Add this class to My Transfer Classes button. Selecting the Keep this value box will retain the selected term value for the next class added. If any required fields have been missed, an error message box will be displayed and the drop-down box will be highlighted in red.

The calendar type from the rad-ets-mst or UCX-TRQ060 is used to default the calendar type drop-down list. The user may choose a different calendar type if the classes taken were taken under a different calendar at that school – meaning either the default you have for this school is wrong or the school switched from one system to another while the student was there.
Setup notes:

Set the **Show in WebTreQer** flag in UCX-STU398 to control which transfer grades appear in the drop-down list.

Set the **Show in WebTreQer** flag in UCX-STU016 to control which terms appear in the drop-down list. You will need to add transfer terms to UCX-STU016 as users need to be able to choose the term when they took the classes even if that term is not valid at your institution.

Set the **Show in WebTreQer** flag in UCX-STU346 to control which calendar types (Semester, Quarter, etc) appear in the drop-down list. Also be sure to set the **Convert Number** so Transfer Equivalency Self-Service knows how to convert each type of credits to your system’s credits.

After clicking **Add this class to My Transfer Classes**, the transfer class will display on the right side of the screen and you can add additional courses from this institution by clicking on **Select another class**, or select another transfer institution and add courses taken there by clicking on **Back to School List**, or edit the course by clicking on the icon, or proceed to course articulation by clicking on the **Next** button. You can also delete this class by clicking the icon.
Entering Test Scores

On page 2, users can decide to enter a placement test score instead of transfer class information. Clicking on the **Add a placement test** button presents the user with the page where a placement test score can be entered.

The test name and score are required with the date the test was taken being optional.

**Setup notes:**

Configure the `treq.webtreger.placementTests.showAddTest` Shepherd setting to “true” to display the **Add a placement test** button on the page. If this setting is not configured, users will not be able to add test scores.

Set the **Credit by Exam** flag in UCX-STU314 to control which tests appear in the drop-down list.
Clicking on the **Add** button places the test on the right side of the page allowing the user to further edit the test or delete it.

### Modifying the list of tests

The tests dropdown ordering may be changed, to be ordered by specific columns, and even by sub elements in the columns.

Using Shepentry to set the value appropriately in the following setting will change the order the tests are displayed:

```
treq.webtregr.placementTests.orderBy
```

Valid order by fields that can be used in this value are as follows, the numbers in parentheses represent the range of values:

- `_ucxKey(1-12)`,
- `_sDescription(1-30)`,
- `_sReserved1(1-40)`,
- `_sTreQMinimumScore(1-4)`,
- `_sCreditByExam(1-1)`,
- `_sReserved2(1-11)`,
- `_sLoadTestScheme(1-1)`,
- `_sErrorNumber(1-4)`,
- `_sLowEdit(1-4)`,
- `_sHighEdit(1-4)`,
- `_sReserved3(1-1)`,
- `_sReserved4(1-69)`
Examples:

The following configuration value will order the tests dropdown by ucxkey, then description:

   _ucxKey, _sDescription

The following configuration value will order the tests by the first 12 characters of the description:

   _sDescription(12)

Articulation report

In the articulation results screen, the user will see how the courses they took at other institutions will apply at your institution. All transfer classes entered are matched against the mappings you have for the corresponding schools and an articulation report is displayed.

The articulation report displays the following details:

- A icon is displayed next to a transfer class that was articulated successfully. Placing the mouse over the icon displays a message explaining the results for the particular class.

- When the class was matched to a particular mapping but a restriction on the mapping did not allow it to be articulated a Not Transferrable message is displayed, explaining the reason why.

- A icon is displayed if the class matched two different mapping records – telling the user that an administrator would make a choice in the real articulation – Transfer Equivalency Self-Service does not make a choice for the user or allow the user to make a choice.

- A icon is also displayed if two different transfer classes map to the same class at your institution – this is a duplicate situation. However, if the rad-course-mst repeat-max flag for your native course is set to “Y” or a number that is not zero, no duplicate situation will arise – the student is allowed to articulate multiple transfer classes to the same repeatable course. This is useful for ELEC 999 courses – those that normally count in electives but don’t satisfy any particular requirement.
3. Display articulation results

Butte College
ACCT 2 Not Transferrable: Taken with too few credits

CSU Stanislaus
ANTH 4155 ELEC 1006 Duplicate Situation
ANTH 4211 ELEC 1006 Duplicate Situation

UC Berkeley
ENGLISH 1A GE A420 WRITTEN COMMUNICATION B 2.6

ENGLISH 1A taken at UC Berkeley may equate to GE A420 here.

The user can go back and correct any erroneous transfer course data by clicking on the Previous button, or go forward to see their anticipated progress towards degree completion at your institution by clicking on the Next button.

Setup notes:

Make sure the repeat-max setting is getting bridged correctly for your ELEC type of courses so users don’t see the duplicate message on courses that can be repeated.

You may alter that text that appears for each Not Transferrable situation by altering the description in UCX-TRQ065.

When an undecided situation is encountered a red arrow icon is displayed with the choices displayed on the right. Place the mouse over the icon, for a description of the situation.

Butte College
AAA 101 ACCT 10 Accounting 1

OR
AAA 101, 102, 103 Accounting 1

AAA 101 taken at Butte College has more than one equivalent here. A school administrator must make the decision as to the best option for your particular situation.
When a *duplicate* situation is encountered a red arrow icon is displayed next to each transfer class with the duplicated native class on the right. Place the mouse over the icon, for a description of the situation.

**Butte College**

AGS 50 ➡ GE B100  Duplicate Situation
AGS 51 ➡ GE B100  Duplicate Situation

AGS 51 taken at Butte College may equate to GE B100 here - but results in a duplicate situation.

When a transfer class equates to multiple native classes, this is how it will appear:

**Butte College**

ACCT 2 ➡ ACCT 2251  PRIN OF ACCTG I  A-  3.0

ACCT 2 taken at Butte College may equate to ACCT 2251 and ACCT 2252 here

Only those classes that are articulated successfully (those with a green arrow icon) are included in the degree audit.

**Auto-resolution**

Transfer Equivalency can be configured to resolved duplicate and undecided situations automatically based on a set of defined rules. Rather than returning an unresolved articulation, if more than one matching mapping is found (an undecided scenario) or if the student has more than one transfer class that maps to the same course(s) at the transfer school (a duplicate scenario), a hierarchy of resolution rules can be defined and if a match still cannot be determined after working through the hierarchy, it will check the defined "rule of last resort".

Transfer classes for which no mapping can be found can be configured to map to a generic course. If this setting is used, then the course will be counted in the overall degree credits and can apply to rules on the transfer audit.

Review the following Shepherd settings to ensure they are configured correctly for your Transfer Equivalency Self-Service environment:

- articulation.leftoverCourse.courseDiscipline
- articulation.leftoverCourse.courseNumber
- articulation.resolutionRules.duplicate
- articulation.resolutionRules.undecided
- articulation.ruleOfLastResort
Resolution Options

These resolution options apply to the Duplicate and Undecided settings. You can specify multiple options using a comma-delimited list of these options. These options should be applied in list order until a final mapping is found or until all resolution options have been tried.

The sub sections that follow provide an explanation of each resolution option followed by a list of configuration settings and their supported resolution options.

CREDITMAX

For all the potential mappings, add up the total amount of credits that would be awarded in each. The mapping that would result in the most transfer credits wins.

For example, you can have the following Undecided situations:

a. MATH 101, MATH 102 -> MATH 200, MATH 300, MATH 400
b. MATH 101, MATH 103 -> MATH 51, MATH 22

Or

c. ENG 35, ENG 36, ENG 37 -> HUMN 104
d. ENG 35, ENG 38 -> ENG 200

In Case A, MATH 101 is part of a pair of transfer classes that maps to three local classes. In Case B, the transfer class pair maps to a pair of local classes. But, all that matters is the total number of credits awarded by the local classes. If the total transfer credits in Case B is 10 and Case A is 8, then CREDITMAX says the articulation engine would choose Case B.

Similarly, in Case C and D, even though ENG 35 is part of a transfer class pair in one mapping and a trio in another, all we care about is if HUMN 104 awards more or less credits than ENG 200.

LOCALHIGH

Use the mapping with the highest numbered local course (course at the Target School). This can be used any time transfer classes can be mapped to more than local course.

a. MATH 101, MATH 102 -> MATH 200, MATH 300, MATH 400
b. MATH 101, MATH 103 -> MATH 51, MATH 22

Or

c. ENG 101 -> ENG 200
d. ENG 101 -> ENG 500

Or

e. ENG 101 -> ENG 200
f. ENG 102 -> ENG 200

In Case A and Case B, MATH 400 is the highest numbered local course in any of the resulting mapping options, so that is the option the articulation engine would choose.
Similarly, in Case C and Case D, ENG 500 is the highest numbered local course, so the articulation engine will choose it if using LOCALHIGH.

In Case E and F, both local courses are the same. This is a Duplicate situation. In this case, LOCALHIGH would have no effect in resolving the mapping and the auditor engine would move to the next resolution option, so it really should not be used at all. However, if it is used, it will not cause any errors.

Course numbers will be compared numerically to determine which is highest (any alpha characters will be stripped out and the resulting integer will be used). That means that MATH 30L, CALC 30, and STAT 3H0 are the same number.

**TRANSFERHIGH**

Use the mapping with the highest numbered source class (the classes taken by the student).

- a. MATH 101, MATH 102 -> MATH 200, MATH 300, MATH 400
- b. MATH 101, MATH 103 -> MATH 51, MATH 22

Or

- c. ENG 101 -> ENG 500
- d. ENG 102 -> ENG 200

Or

- e. ENG 101 -> ENG 200
- f. ENG 101 -> ENG 500

In Case A and Case B, MATH 103 is the highest numbered transfer class in any of the resulting mapping options, so that is the option the articulation engine would choose.

In Case C and Case D, ENG 102 is the highest numbered transfer class, so it is the option the articulation engine would choose.

In Case E and Case F, the same transfer class is used in both mapping pairs, so TRANSFERHIGH will not lead to a resolution and the articulation engine will need to move to the next option.

As with LOCALHIGH, class numbers will be compared numerically.

**RECENT**

Use the class that was taken most recently. This only applies to transfer classes. The term would determine which class was most recent (e.g., Spring 2013 is more recent that Fall 2012).

**RANDOM AND NONE**

RANDOM allows the auditor to pick a mapping arbitrarily. This resolution option could lead to different results each time. NONE tells the auditor do not resolve this mapping.

- a. MATH 101, MATH 102 -> MATH 200, MATH 300, MATH 400
- b. MATH 101, MATH 103 -> MATH 51, MATH 22
In Case A and Case B, RANDOM means the auditor may choose A one time and B the next. It is recommended that RANDOM is used as the Rule of Last Resort rather than NONE.

REPEAT POLICY AND RESOLUTION OPTIONS

The RAD.Course_MST.RAD_REPEAT_MAX for the target school class can affect the resolution option. That field can be set to a value between 1 and 99 or Y, which indicate that a class can be repeated an infinite amount of times.

For duplicate situations, this means that multiple source school classes can articulate to the same target class. For example:

\[
\begin{align*}
\text{MATH 101} & \rightarrow \text{CALC 100} \\
\text{MATH 102} & \rightarrow \text{CALC 100}
\end{align*}
\]

If CALC 100 has RAD_REPEAT_MAX set to 1-99 or Y, then both classes will articulate to CALC 100 in a Transfer Audit.
Audit report

In the audit results screen, the user will see how the courses they took at other institutions will apply at your institution as well as what courses are still needed to completed their degree.

### Degree Progress

- **Requirements**: 15%
- **Credits**: 10%

### BA Liberal Studies Program - Liberal Arts Track

- **Minimum GPA met**: Yes
- **Minimum Credits met**: Yes
- **GPA**: 3.0
- **Credits**: 30

#### Incomplete Requirements

- **Insufficient Higher Education GPA**: No
- **NonCount GPA**: Yes
- **Insufficient Transfer GPA**: No
- **NonCount GPA**: Yes
- **Required Major**: Yes

#### Major in Anthropology

- **Total Credits Needed**: 120
- **Total Credits in Residence Needed**: 30
- **Required Courses**
  - **Basic Anthropology**: 12 Credits in ANTH 1000-1999
  - **Mathematics or Statistics Course**: 6 Credits in ANTH 1120 or 1302
  - **Mathematics or Statistics Course**: 6 Credits in ANTH 2430 or ENGL 3001
  - **Element of Lab**: 4 Credits in ANTH 2900 or 2702 or 2703 or 3430 or 3210

#### Additional Requirements

- **Cultural Anthropology**:
  - **Intro to Anthropological History**: 3 Credits in ANTH 2900
  - **Native American Studies**: ANTH 3500
- **Asian Studies**:
  - **General**
- **Electives**:
  - **Total Needed**: 4.5 Credits in ELEC 2010 or 2020 or 1000-1090 Except ELEC 1032 or 1020
  - **Other Requisite Studies Needed**: Yes
To view transfer equivalencies that may be accepted by your institution to complete a requirement, the user can click on the course in the degree audit.

- **Intro to Anthropological History**
  - Still Needed: 3 Credits in **ART 100**

- **Native American Studies**
  - Still Needed: 3 Credits in **ART 200**

A list of courses offered by your partner institutions will display to aid them in their degree planning.

**Note:** This list is available only if the course link configuration has been set up in Surecode. See the *Technical Guide* for more information about course link.

<table>
<thead>
<tr>
<th>Transfer equivalences for CS 1020</th>
</tr>
</thead>
<tbody>
<tr>
<td>Taking this class(es)</td>
</tr>
<tr>
<td>------------------------</td>
</tr>
<tr>
<td>CIS 3</td>
</tr>
<tr>
<td>CSC 110</td>
</tr>
<tr>
<td>COMP 103</td>
</tr>
<tr>
<td>CSCI 8</td>
</tr>
<tr>
<td>CIS 100M</td>
</tr>
<tr>
<td>CIS 100P</td>
</tr>
</tbody>
</table>

The user can print out the list of transfer equivalencies by clicking on **Print**.
Setup note:

Configure the treq.webtreger.auditPage.include Shepherd setting to "true" to display the Audit Report page. If this setting is not configured, users will not see the audit report and the page that users will see they click Next on the Articulation Results page will be the Next Steps page.

Modifying images on the Audit report

The images and styles used by the Transfer Equivalency Self-Service audit report come from the 'Classic' Degree Works style set. So, any localizations that you make in the DGW_Style.css file for your classic audit setup, will also apply to the Self-Service audit.

See the Localizing Worksheets section of the Technical Guide for more information about the DGW_Style.css stylesheet.

The core.classicUrl.serverDomain Shepherd setting specifies the Classic Degree Works URL. Use Shepentry to set the value of this setting to point to the Classic Degree Works URL.

Modifying the Audit report format

The type of audit report that will be used to display the results of the audit can be modified. Audit reports are in the form of .xsl stylesheets. To modify the existing audit report format, locate and edit the TreqReportAudit.xsl file. The file is present in the degreeworks-WebTreQer-n.n.n.war (where 'n.n.n' is the release number, for example, degreeworks-WebTreQer-4.1.1.war) that you downloaded with the Degree Works installation file package and deployed.

1. Open the .war file for your deployment using a file compression tool such as WinZip or 7-Zip, navigate to the WEB-INF\classes\ folder and extract the TreqReportAudit.xsl file.

2. Use an editor such as Notepad to edit the file and make the required text changes.

For example, to change the name of the progress bar that is displayed at the top of the audit, locate the <xsl:variable name="LabelProgressBar"> Degree Progress </xsl:variable> entry on the file and change 'Degree Progress' to some other name, for example, 'Career Progress'.

In the same way, you can modify other text or the audit report layout.

3. Save the file once you complete all the changes and place it back in the .war file archive.

Note: For UNIX environments, the war file needs to be re-packaged.

4. Restart the server on which the application is running and clear your browser cache before re-starting Transfer Equivalency Self-Service.

All the format changes will be displayed on the audit report.

Important: You need to make these changes each time you upgrade to a new version of Transfer Equivalency Self-Service.
Specifying a new Audit report format

The type of audit report that will be used to display the results of the audit can be changed. Audit reports are in the form of .xsl stylesheets. The list of audit report formats is stored in the UCX-RPT036 UCX table.

Use the Surecode application to browse the available audit report formats and see the details of each. In Surecode, click on Reports on the left navigation panel and then double-click RPT036: Audit Report Formats. The list of available audit reports is displayed. Report formats prepared by Ellucian for Transfer Equivalency follow a naming convention of "TRQ##" or "WEB##", where "##" is a 2-digit number. You can create a customized audit report format and use it to display audit results. After creating the .xsl, you must add the details of the new report format to Surecode. See the Surecode User Guide for details on adding a new Surecode record, and see the Surecode UCX Tables Technical Guide for more information on the UCX-RPT036 table and table fields.

Once you have added the details to Surecode, you need to specify the report format that will be used as the default report format in the treq.webtreger.audit.report Shepherd setting, using the Shepentry application. In Shepentry, click on System Settings in the left navigation panel. Locate the treq.webtreger.audit.report setting and double click on the setting name to edit the setting details and specify a new report format. See the Shepentry User Guide for details on navigating through Shepentry.

You need to restart the Transfer Equivalency Self-Service application for the new format to take effect. Audit results will now be displayed in the new audit format.
What’s Next?

The What’s Next page in Transfer Equivalency Self-Service provides several options to the user after the user has entered their transfer data and articulated and viewed the results. Users can go back and make changes, print out a report of their work, submit an application for admissions, or request more information about your institution, chat with an advisor about any questions they may have.

These options can be configured; as an administrator, you can specify an unlimited number of options to be displayed to users.
The user can generate a report of all their work, including the articulation results and audit, by clicking on **Show Results**. To send the report to a local printer, click on the **Print** button.

**Note:** If the `treq.webtreqer. auditPage.include` Shepherd setting has not been set to “true”, the audit report section of the results will not be displayed.

## My Goals

<p>| | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Enroll</td>
<td></td>
</tr>
<tr>
<td>Degree</td>
<td>Bachelor of Arts</td>
</tr>
<tr>
<td>Have AA degree</td>
<td>No</td>
</tr>
<tr>
<td>Level</td>
<td>Undergraduate (UG)</td>
</tr>
<tr>
<td>Major</td>
<td>Anthropology</td>
</tr>
<tr>
<td>Minor</td>
<td>Art</td>
</tr>
</tbody>
</table>

## My Transfer Classes

<table>
<thead>
<tr>
<th>Transfer School</th>
<th>Course</th>
<th>Title</th>
<th>Grade</th>
<th>Credits</th>
<th>Term</th>
<th>Type</th>
</tr>
</thead>
<tbody>
<tr>
<td>Chabot College</td>
<td>ANTH 1</td>
<td>Physical Anthropology</td>
<td>A</td>
<td>3.0</td>
<td>Spring 2009</td>
<td>Seminar</td>
</tr>
<tr>
<td>Chabot College</td>
<td>ANTH 5</td>
<td>Cultural Phonemics: Anthropology</td>
<td>A</td>
<td>3.0</td>
<td>Spring 2009</td>
<td>Seminar</td>
</tr>
<tr>
<td>Chabot College</td>
<td>ANTH 4901</td>
<td>Magic, Witchcraft and Religion</td>
<td>A</td>
<td>3.0</td>
<td>Spring 2009</td>
<td>Seminar</td>
</tr>
<tr>
<td>Butte College</td>
<td>AB 20</td>
<td>Orientation to Ag &amp; Natural Res</td>
<td>A</td>
<td>3.0</td>
<td>Fall 2010</td>
<td>Quarter Test</td>
</tr>
<tr>
<td>Butte College</td>
<td>AGS 50</td>
<td>Soils</td>
<td>A</td>
<td>4.0</td>
<td>Fall 2010</td>
<td>Quarter Test</td>
</tr>
<tr>
<td>Butte College</td>
<td>ANTH 20</td>
<td>Peoples and Cultures</td>
<td>A</td>
<td>3.0</td>
<td>Fall 2010</td>
<td>Quarter Test</td>
</tr>
<tr>
<td>Butte College</td>
<td>ANTH 24</td>
<td>People and Cultures II - Forms</td>
<td>A</td>
<td>3.0</td>
<td>Fall 2010</td>
<td>Quarter Test</td>
</tr>
<tr>
<td>Butte College</td>
<td>ANTH 32</td>
<td>Native Americans</td>
<td>A</td>
<td>3.0</td>
<td>Fall 2010</td>
<td>Quarter Test</td>
</tr>
<tr>
<td>Butte College</td>
<td>ANTH 34</td>
<td>Native Americans Today</td>
<td>A</td>
<td>3.0</td>
<td>Fall 2010</td>
<td>Quarter Test</td>
</tr>
<tr>
<td>Butte College</td>
<td>ANTH 40</td>
<td>Field Archaeology</td>
<td>A</td>
<td>3.0</td>
<td>Fall 2010</td>
<td>Quarter Test</td>
</tr>
</tbody>
</table>

## My Transfer Work

<table>
<thead>
<tr>
<th>Examination</th>
<th>Title</th>
<th>Score</th>
<th>Date Taken</th>
</tr>
</thead>
<tbody>
<tr>
<td>ACTS</td>
<td>ACT New Science Reasoning</td>
<td>30</td>
<td>31-Jan-12</td>
</tr>
</tbody>
</table>

## Articulation Results

### Butte College

| AB 20 | ANTH 102 Intro to Anthropology | A | 3 |
| AGS 50 | GE B100 PHYSICAL SCIENCE | A | 0 |

| ANTH 20 | Class Not Transferable: Not taken in accepted term |
| ANTH 21 | ANTH 35-49 PEOPLES OF ASIA | A | 0 |
| ANTH 32 | GE D200 ETHNIC STUDIES | A | 0 |
| ANTH 34 | ANTH 3500 A AMER SINHANES | A | 3 |
| ANTH 40 | ELEC 1000 ANTHROLOGY ELECTIVE | A | 0 |

### Chabot College

| ANTH 1 | ANTH 1100 INTRO BOL ANTHRO | A | 4.5 |
| ANTH 4901 | ELEC 1006 ANTHROLOGY ELECTIVE | A | 4.5 |

### Examinations

| ACNS | Class Not Transferable: No mapping found |

## Audit Results

<table>
<thead>
<tr>
<th>Transfer Equivalency Worksheet</th>
<th>Evaluated 01-Feb-2012 at 09:54</th>
</tr>
</thead>
<tbody>
<tr>
<td>Degree</td>
<td>Bachelor of Arts</td>
</tr>
<tr>
<td>Major</td>
<td>Anthropology</td>
</tr>
<tr>
<td>Overall GPA</td>
<td>0.002</td>
</tr>
</tbody>
</table>

### Requirements

<table>
<thead>
<tr>
<th>Requirements</th>
<th>Degree Progress</th>
</tr>
</thead>
<tbody>
<tr>
<td>15%</td>
<td></td>
</tr>
</tbody>
</table>

### Credits

<table>
<thead>
<tr>
<th>Credits</th>
<th>10%</th>
</tr>
</thead>
</table>
### BA Liberal Studies Program - Liberal Arts Track

**Unmet conditions**
- Minimum GPA unsatisfied
- 45 Credits in residence needed
- Minimum Credits unsatisfied
- 135 Credits needed

**Still Needed:**
- Insufficient Higher Education GPA
- One NonCourse GPA
- Insufficient Cumulative GPA
- One NonCourse GPA
- Required Major

**Major in Anthropology**

**Unmet conditions**
- 77.5 Credits needed
- 18 Credits in residence needed

**Still Needed:**
1. Class in ASTR 503 or GEOL 1631 or 1041* or GERM 321 or HERB 300

**PHYSICAL ANTHROPOLOGY**
- Basic Anthropology
  - Still Needed: 12 Credits in ARTH 1000:2000
- General & Survey
  - Still Needed: 6 Credits in ARTH 1300 or 2300
- Mathematics or Statistics Course
  - Still Needed: 4 Credits in ARTH 1130 or 1304 or CS 2450 or ENGL 3001
- Elements of Lab

**GE D300**
- Still Needed: 1 Class in ARTH 1700 or 1780 or GE D3X or GEOL 2041*

**Introductory Field Work**
- Still Needed: 1 Class in ARTH 2701 or 2702 or 2703 or 3430 or 3210

**CULTURAL ANTHROPOLOGY**
- Intro to Anthropological History
  - Still Needed: 3 Credits in ARTH 1000
  - Native American Studies

**ARTH 3500**
- Asian Studies
  - Still Needed: 3 Credits in ARTH 3540

**ELECTIVES**
- Still Needed: 4.5 Credits in ELEC 2020 or 2020 or 1000:1900 Exceed ELEC 1002 or 1020

**Minor in Art**

**Unmet conditions**
- 6 Credits needed
- Minimum GPA unsatisfied

**ART MINOR REQUIREMENTS**
- Intro to Anthropological History
  - Still Needed: 3 Credits in ART 100
- Asian Studies
  - Still Needed: 3 Credits in ART 200
- Native American Studies
  - Still Needed: 3 Credits in ART 200
- African Studies

**ARTH 102**

**Total Required Courses:**
- Credits Applied: 45
- Classes Applied: 4

**Legend**
- Complete
- Not Complete
- Any course number
- Nearly complete – see advisor

**Note:**
This report should be used as a guide to help you understand how your transfer classes may equate to classes here and to how those classes may apply to degree requirements. The Registrar's Office may be contacted for assistance in interpreting this report. This audit is not your academic transcript and it is not official notification of completion of degree or certificate requirements. Please contact the Registrar's Office regarding this degree audit report, your official degree/certificate completion status, or to obtain a copy of your academic transcript.
Modifying the options displayed on the What’s Next page

The What’s Next page contains both static and dynamic elements.

The dynamic elements that are displayed on the What’s Next page can be modified through the `treq.webtreger.whatsNextList` Shepherd setting. The sample below details the value of that setting:

```xml
<?xml version="1.0" encoding="UTF-8"?>
<WhatsNextBoxList>
  <!-- An unlimited number of <WhatsNextBox /> tags are allowed -->

  <WhatsNextBox>
    <title>ADMISSIONS APPLICATION</title>
    <url>http://google.com</url>
    <target>_blank</target>
    <text><![CDATA[Click here to start the application process]]></text>
  </WhatsNextBox>

  <WhatsNextBox>
    <title>MORE INFORMATION</title>
    <url>http://google.com</url>
    <target>_self</target>
    <text><![CDATA[Click here to receive more information about Ellucian University]]></text>
  </WhatsNextBox>

</WhatsNextBoxList>
```

Each option on the page corresponds to an entry defined within a `WhatsNextBox`. A new option on the What’s Next page can be defined within a `WhatsNextBox`, and an unlimited number of these boxes can be defined. The title, URL and text of the box can be localized. The `Text` text must be enclosed within `<![CDATA[ and ]]>`.

**Important:** Ensure that the value of the setting is entered in a single line without any line breaks.

If you do not want a particular option to be displayed, delete or comment out the value from the setting.
Modifying the Make Some Changes and Show Results options

The functions to go back to **Make Some Changes** and to **Show Results** are static elements on the What’s Next page and are hard-coded. If you do not want these options to display, set the value to `false` in the following Shepherd settings using Shepentry:

```
trreq.webtreger.whatsNext.goBackShow
trreq.webtreger.whatsNext.printShow
```

You can localize the title and text in these boxes by modifying the appropriate entries from the WebtregerMessages.properties file:

```
trreq.whatsNext.goBackTitle=MAKE SOME CHANGES
trreq.whatsNext.goBackText=Click here to go back and make changes to your selections

trreq.whatsNext.printTitle=SHOW RESULTS
trreq.whatsNext.printText=Click here to create a report showing all the results
```

Modifying the Talk With An Advisor option

The **Talk With An Advisor** option contains special logic to work with InstantRapport, Leepfrog’s managed instant messenger solution. To use Leepfrog’s InstantRapport with Degree Works, you must first license this product from Leepfrog Technologies, Inc.

If you do not want this option to display, use Shepentry to set the value to `false` in the following setting:

```
trreq.webtreger.whatsNext.instantrapport.show
```

If you do want this option to display, use Shepentry to set the above value to `true` and configure the following entries appropriately:

```
trreq.webtreger.whatsNext.instantrapport.team
treq.webtreger.whatsNext.instantrapport.url
treq.webtreger.whatsNext.instantrapport.sendName
treq.webtreger.whatsNext.instantrapport.sendEmail
treq.webtreger.whatsNext.instantrapport.sendMajor
treq.webtreger.whatsNext.instantrapport.sendMinor
treq.webtreger.whatsNext.instantrapport.sendDegree
treq.webtreger.whatsNext.instantrapport.sendCatalog
treq.webtreger.whatsNext.instantrapport.sendSchool
treq.webtreger.whatsNext.instantrapport.sendSchoolsAttended
```
## UCX Tables used in Transfer Equivalency Self-Service

<table>
<thead>
<tr>
<th>UCX-Table</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>UCX-STU016</td>
<td>Terms – be sure to add transfer terms and to flag those you want to appear in Transfer Equivalency Self-Service</td>
</tr>
<tr>
<td>UCX-STU023</td>
<td>Your majors – be sure to flag those you want to appear in Transfer Equivalency Self-Service</td>
</tr>
<tr>
<td>UCX-STU024</td>
<td>Your minors – be sure to flag those you want to appear in Transfer Equivalency Self-Service</td>
</tr>
<tr>
<td>UCX-STU035</td>
<td>Academic/catalog year – be sure to flag those you want to appear in Transfer Equivalency Self-Service</td>
</tr>
<tr>
<td>UCX-STU307</td>
<td>Your degrees – be sure to flag those you want to appear in Transfer Equivalency Self-Service</td>
</tr>
<tr>
<td>UCX-STU316</td>
<td>Your program – be sure to flag those you want to appear in Transfer Equivalency Self-Service</td>
</tr>
<tr>
<td>UCX-STU346</td>
<td>Calendar types – Semester, Quarter, etc</td>
</tr>
<tr>
<td>UCX-STU350</td>
<td>Your schools/levels – be sure to flag those you want to appear in Transfer Equivalency Self-Service</td>
</tr>
<tr>
<td>UCX-STU398</td>
<td>Transfer grades – be sure to flag those you want to appear in Transfer Equivalency Self-Service</td>
</tr>
<tr>
<td>UCX-STU560</td>
<td>Your college – be sure to flag those you want to appear in Transfer Equivalency Self-Service</td>
</tr>
<tr>
<td>UCX-STU563</td>
<td>Your concentration – be sure to flag those you want to appear in Transfer Equivalency Self-Service</td>
</tr>
<tr>
<td>UCX-TRQ060</td>
<td>Local feeder schools – supply school name and calendar</td>
</tr>
<tr>
<td>UCX-TRQ065</td>
<td>Not-equated codes and descriptions</td>
</tr>
<tr>
<td>UCX-TRQ066</td>
<td>Special messages for when no mapping is found for specific tests and courses to replace the generic “No mapping found” message</td>
</tr>
<tr>
<td>UCX-CFG020TREQ</td>
<td>Configuration flags – used by Transfer Equivalency Self-Service and PC Transfer Equivalency</td>
</tr>
</tbody>
</table>
Transfer Equivalency Admin application

You can use the Transfer Equivalency Admin application to help review your mappings (articulation agreements) as they were bridged from your student system. See the Mappings section in the Transfer Equivalency Admin User Guide for more information.