Self-Service Transfer Articulation

Georgia Enhanced Banner Student and Financial Aid Systems User Documentation

Version 8.0

Office of Information and Instructional Technology

March 2010

This page left blank to facilitate front/back printing.

Table of Contents

Introduction 1
- **Purpose** 1
- **Purpose and Scope of Document** 1
- **Graphics** 1
- **References** 1
- **Support** 2

Transfer Articulation Flow 3
- **Description** 3
- **Overview** 3

Implementing Self-Service Transfer Articulation 4
- ***I. Administering WebTailor*** *4*
- ***II. Executing Self-Service Transfer Articulation*** *11*

Appendix A: Document History A-1

Appendix B: Process Flow B-1

This page left blank to facilitate front/back printing.

Self-Service Transfer Articulation

Introduction

Purpose

Self-Service Transfer Articulation provides transfer, transient, and prospective students with a tool to compare class equivalents and details between institutions through Self-Service Banner. After an institution's WebTailor Administrator completes a few modifications, students will be able to access this new feature.

Self-Service Transfer Articulation is designed to be placed inside the secure area of Banner Self-Service and/or outside in the Main, Non-Secured Menu. OIIT advises testing both areas.

Purpose and Scope of Document

This document explains how to use the Georgia Enhanced Self-Service Transfer Articulation process.

This chapter includes the following topics:

- Self-Service Transfer Articulation Flow
- Implementing Self-Service Transfer Articulation
- Executing Self-Service Transfer Articulation

Graphics

Graphic cues used in this document assist with labeling of steps and items that are particularly important.

Steps for recovery or support.

For additional information, see references.

Exercise caution.

Warning: an error here is critical.

References

For information about the baseline product, see *Using SGHE Banner User Manual for Accounts Receivable, Financial Aid, and Student.*

Support

For additional OIIT resources and support, contact the OIIT Helpdesk:

- Web support request self-service: http://www.usg.edu/customer_services
- E-mail: Helpdesk@usg.edu

For emergency, business interruptions, or production down situations, call the OIIT Helpdesk immediately

- 706-583-2001
- Toll free within Georgia: 1-888-875-3697

Transfer Articulation Flow

Description

Self-Service Transfer Articulation provides transfer, transient, and prospective students with a tool to compare class equivalents between institutions through Self-Service Banner. The class equivalent reports are pulled into Self-Service from the Transfer Course Articulation form (SHATATR).

The software requires set up within the Banner application and through WebTailor Administration. This document provides the information and instructions for implementing Self-Service Transfer Articulation.

Overview

I. Administering WebTailor

Log into the secure area of Banner Self Service as a Web Tailor Administrator. Select New Web Tailor Administration Select procedures to modify Select associated roles to modify Modify Information Text

Add Header Text (optional)

Exit WebTailor Administration Menu

↓

II. Executing Self-Service Transfer Articulation (Student Instructions)

1. Log on to Banner Self-Service
2. Select Transfer Articulation from the main menu
3. Select state
4. Select school
5. Select report type and view Disclaimer
6. View report
7. Exit Banner Self-Service

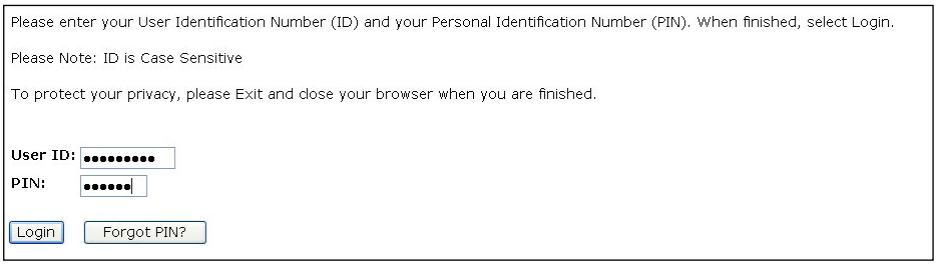
Implementing Self-Service Transfer Articulation

I. Administering WebTailor

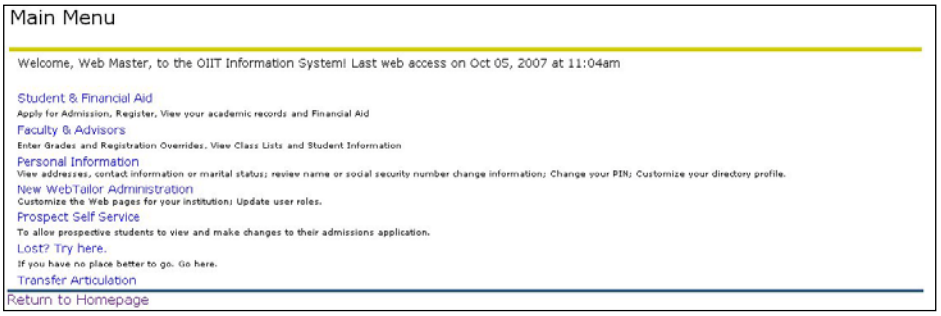
1. Log on to Banner Self-Service Secure Area

Select **ENTER SECURE AREA** from the Banner Self-Service menu.

Enter the User ID and PIN for the institutional WebTailor Administrator and click the **LOGIN** button.



Select **NEW WEBTAILOR ADMINISTRATION** from the **MAIN MENU**.



2. Select procedures to modify

Select **WEB MENUS AND PROCEDURES** from the **WEBTAILOR MENU**.

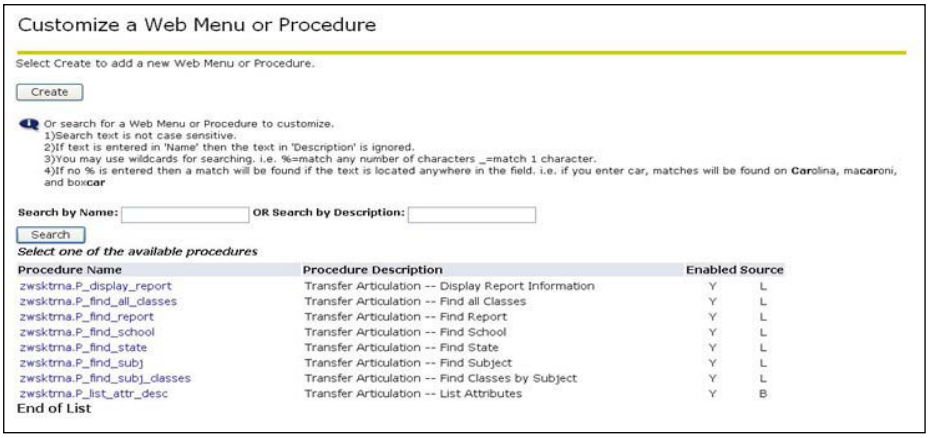
The following procedures are part of the Self-Service Transfer Articulation package:

- zwsktrna.P_display_report (Display report)
- zwsktrna.P_find_all_classes *
- zwsktrna.P_find_report (Choose report type)
- zwsktrna.P_find_school (Choose school)
- zwsktrna.P_find_state (Choose state)
- zwsktrna.P_find_subj *
- zwsktrna.P_find_subj_classes (Display class comparisons for specific subject)
- zwsktrna.P_list_attr_desc **

* The user will modify the procedure, but will not work directly with it while executing Self-Service Transfer Articulation.

** The procedure should appear with the other procedures in the package; however the user should not modify it and will not encounter it directly while executing Self-Service Transfer Articulation.

Select any procedure except zwsktrna.P_list_attr_desc from the **CUSTOMIZE A WEB MENU OR PROCEDURE** menu.

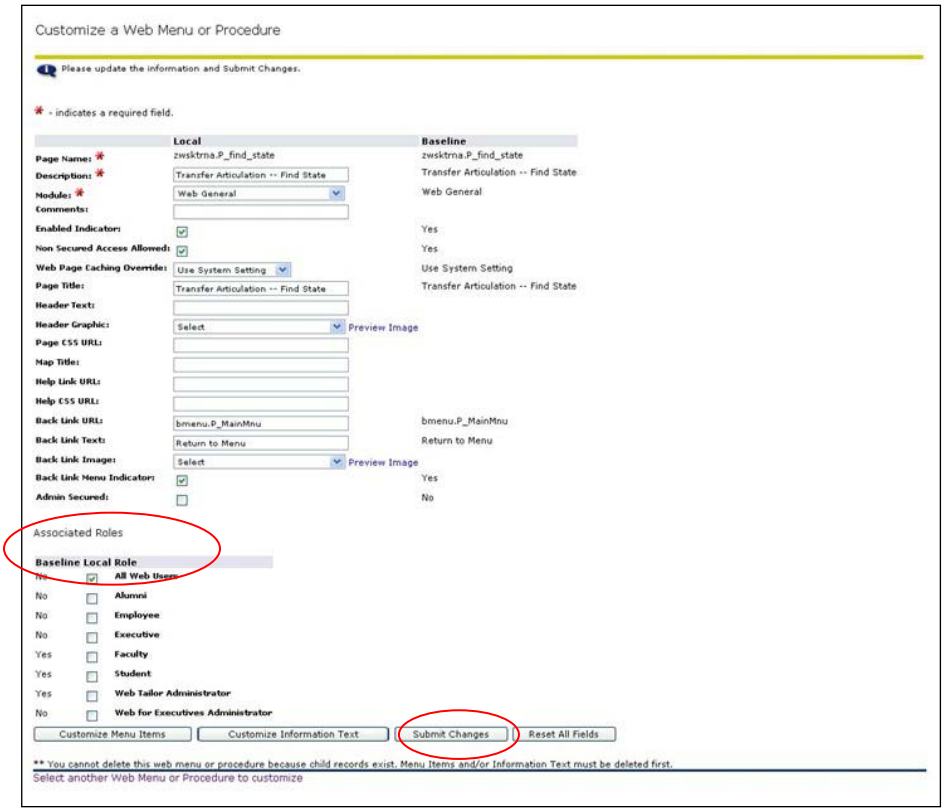


3. Modify Associated Roles

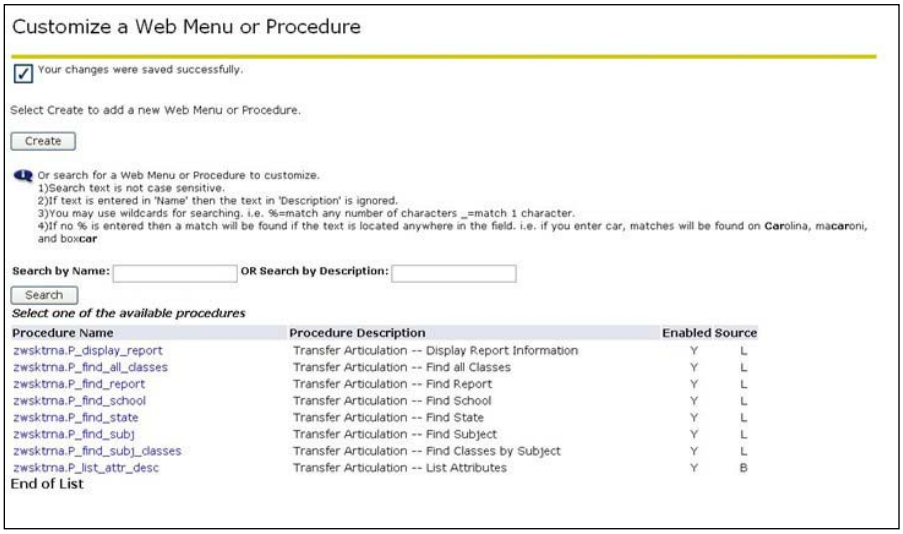
Modify the Associated Roles for each of the procedures listed in Step 2.

Caution

Check appropriate Associated Roles. OIIT recommends that all Web users are given access to these procedures.



Click the **SUBMIT CHANGES** button to save the changes. A message should appear in the **CUSTOMIZE A WEB MENU OR PROCEDURE** window indicating changes have been successfully saved.



If the local Associated Roles are not available for a procedure, select **COPY BASELINE TO LOCAL.**

Warning

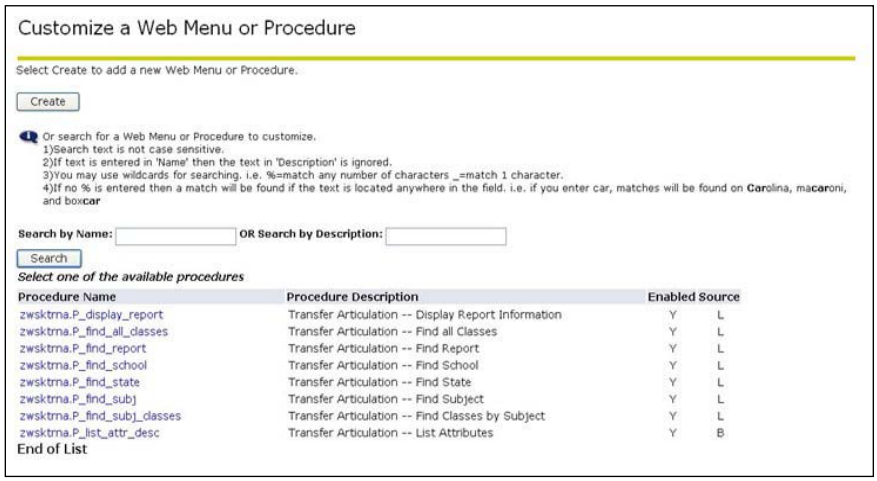
Repeat this step to modify Associated Roles for each procedure (except zwsktrna.P_list_attr_desc).

4. Modify local procedures

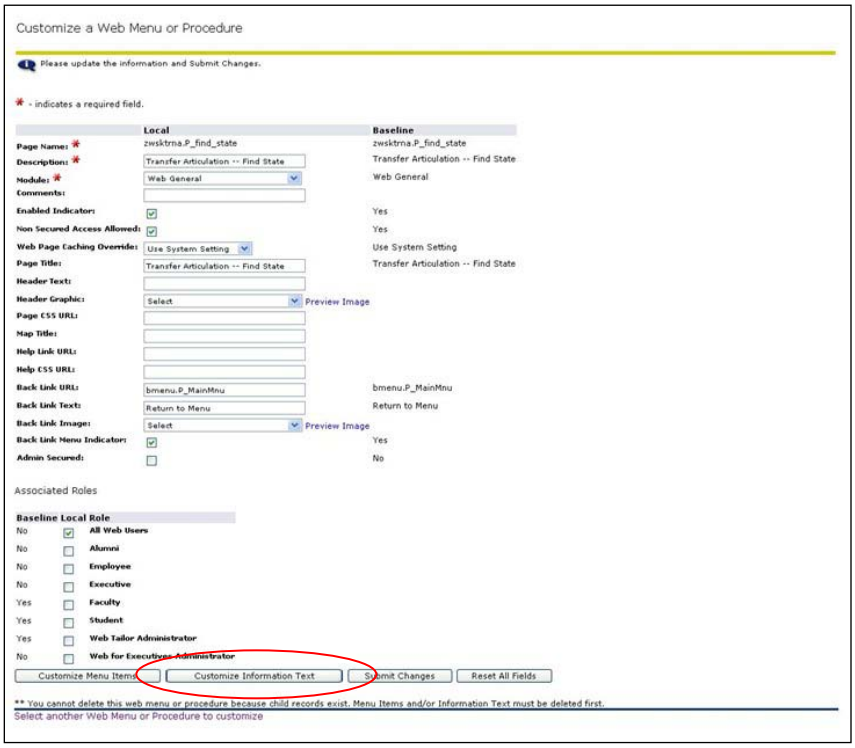
Modify informational text for the following local procedures:

- zwsktrna.P_find_state
- zwsktrna.P_find_report
- zwsktrna.P_find_subj_classes
- zwsktrna.P_display_report

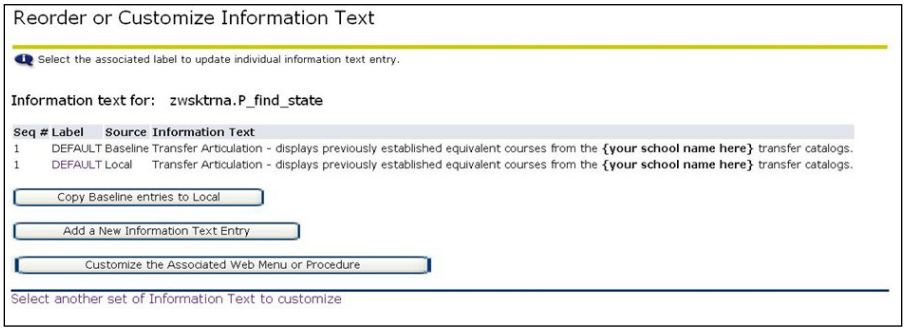
Select one of these four procedures from the **CUSTOMIZE WEB MENU OR PROCEDURE** menu.



Select **CUSTOMIZE INFORMATION TEXT.**



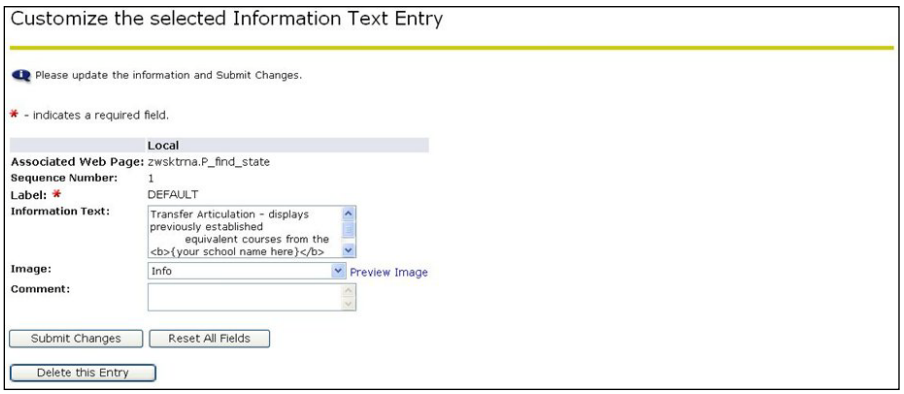
Two labels will display: one represents Baseline and the other represents the Local menu created with this release. Click the **DEFAULT** Local hyperlink to insert your institution's name.



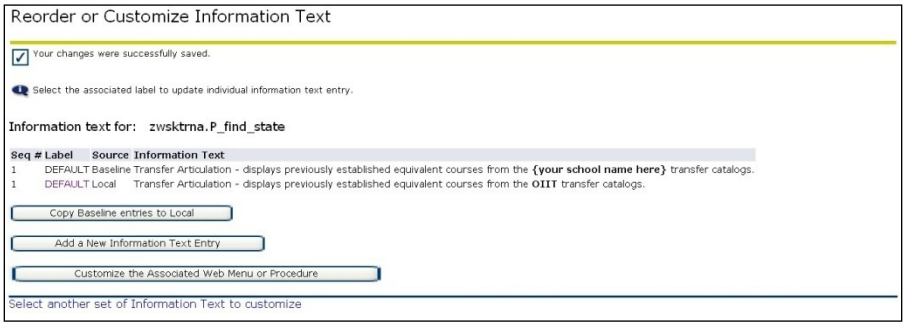
Note: If two labels are not available, select the **COPY BASELINE ENTRIES TO LOCAL** to generate the second, local label.

5. Modify Information Text

Enter institution-specific information in the **INFORMATION TEXT BOX.** In the Information Text box for zwsktrna.P_find_state, replace **{your school name here}** with your institution's name.



Click the **SUBMIT CHANGES** button to save the changes. A message should appear in the **REORDER OR CUSTOMIZE INFORMATION TEXT** window indicating changes have been successfully saved.



Warning

Repeat steps 4 and 5 for the remaining procedures listed at the beginning of step 4.

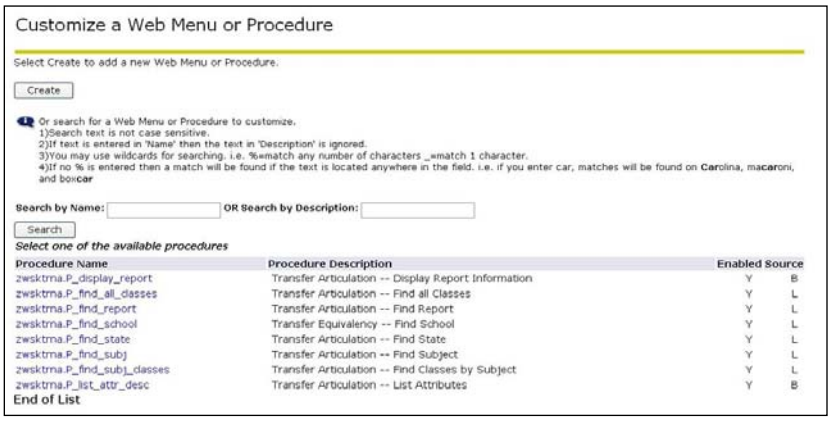
Other references to the home institution's name and abbreviation appear on the Student display side of Self-Service Transfer Articulation. Most of this information pulls from the Institution Code/Name Validation form (ZTVINST).

6. Add Header Text (optional)

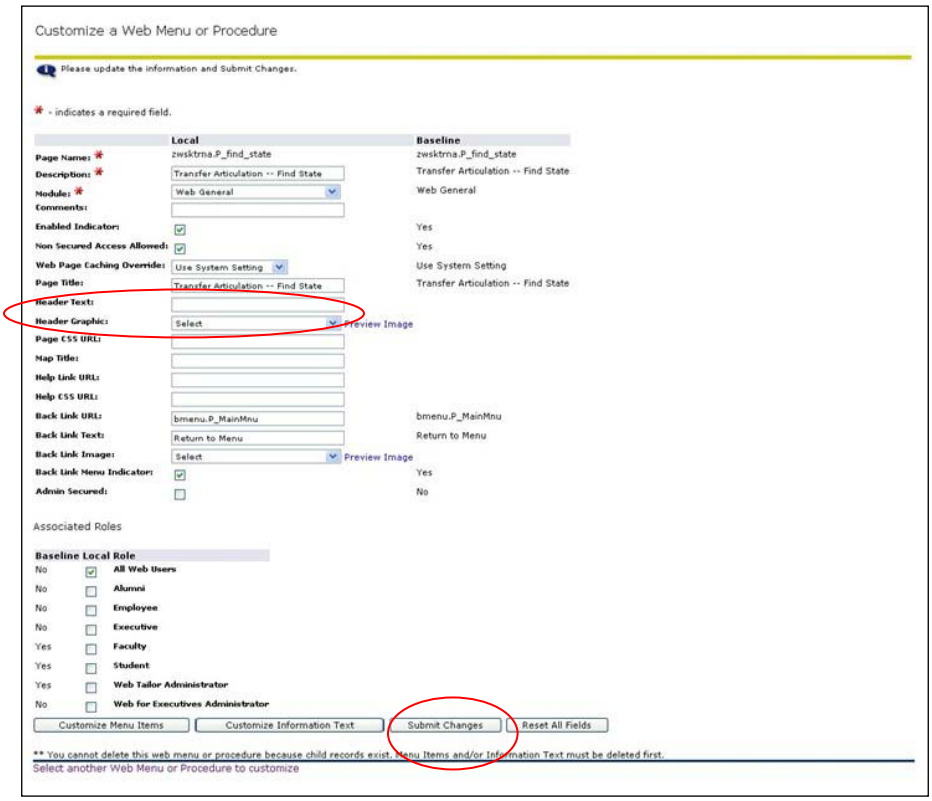
Users may choose to modify Header Text for the following procedures:

- zwsktrna.P_find_all_classes
- zwsktrna.P_find_report
- zwsktrna.P_find_school
- zwsktrna.P_find_state
- zwsktrna.P_find_subj
- zwsktrna.P_find_subj_classes

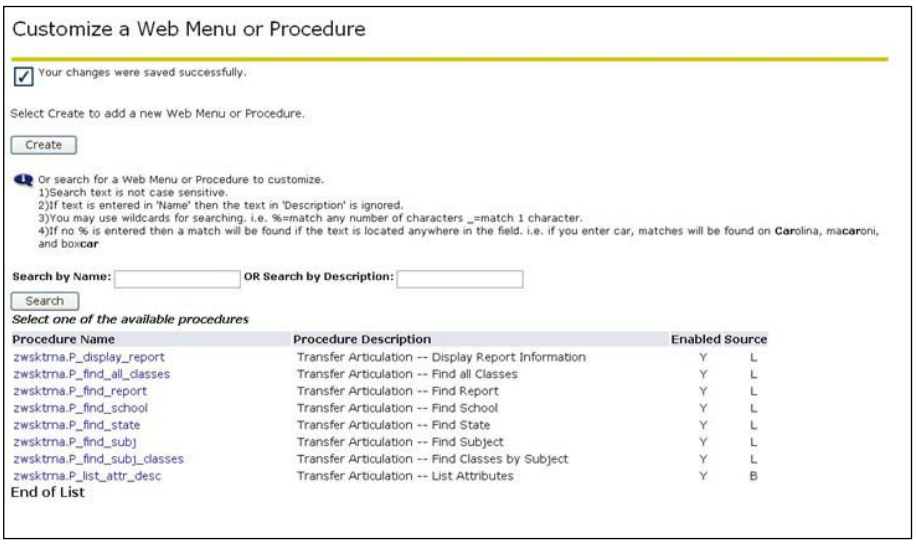
Select one of these procedures from the **CUSTOMIZE WEB MENU OR PROCEDURE** menu.



Enter institution-specific information in the Header Text field.



Click the **SUBMIT CHANGES** button to save the changes. A message should appear in the **CUSTOMIZE A WEB MENU OR PROCEDURE** window indicating changes have been successfully saved.



Repeat step 6 for each procedure to which you wish to add Header Text.

7. Exit Web Tailor Administration Menu

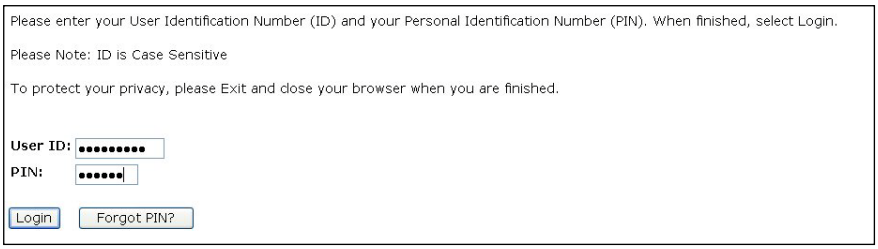
Exit the **WEB TAILOR ADMINISTRATION MENU** to return to the **MAIN MENU**.

II. Executing Self-Service Transfer Articulation

1. Log on to Banner Self-Service

Select **ENTER SECURE AREA** from the Banner Self-Service menu.

Enter the User ID and PIN for a test student and click the **LOGIN** button.

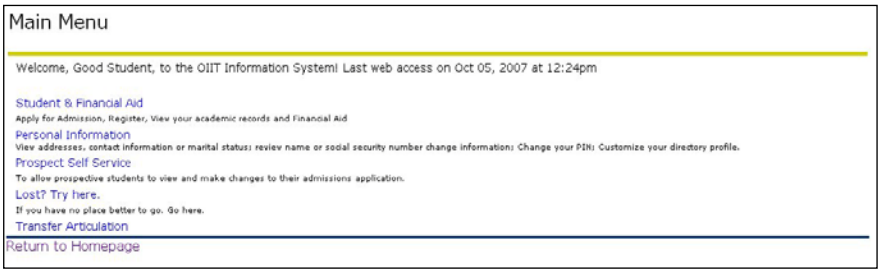


OR

Select **Transfer Articulation** from the Banner Self-Service menu to enter through the non-secure area of Self-Service.

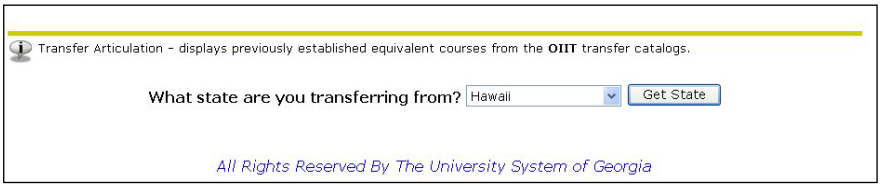
2. Select Transfer Articulation

Select **TRANSFER ARTICULATION** from the **MAIN MENU**.



3. Select a state

Select the transferring institution's state from the drop-down menu and click **GET STATE**. States are only available if an institution from this state has an entry on the Transfer Course Articulation form (SHATATR).



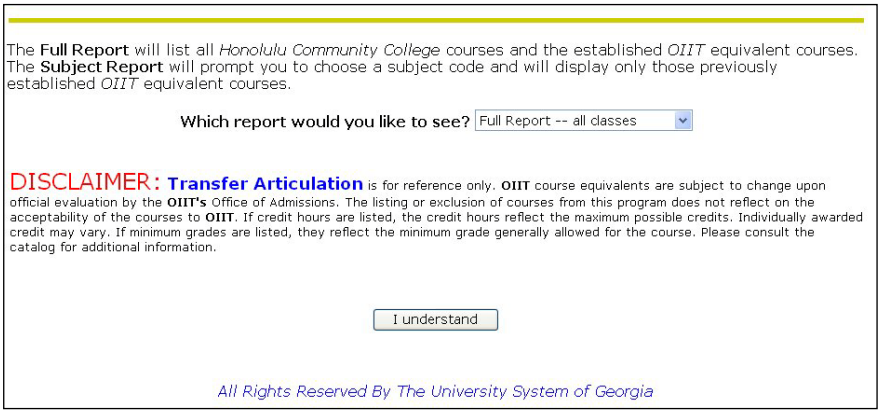
4. Select a school

Select a school from the drop-down menu and click **GET SCHOOL**. Institutions are only available if the institution has an entry on SHATATR.

5. Select a report type and view Disclaimer

Select a report type from the drop-down menu and click **I UNDERSTAND.**

- Full Report - shows all classes
- Subject Report - choose a specific subject

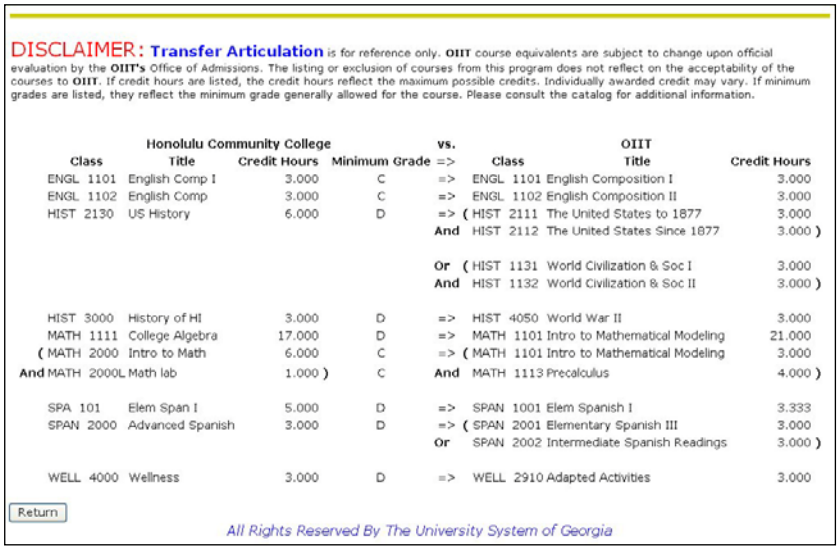


Note: For these examples, the abbreviation of the home institution is OIIT. Self-Service Transfer Articulation requires WebTailor modifications to change the institutional references. It also pulls the home institution's abbreviation from the Institution Code/Name Validation form (ZTVINST).

6. View report

Full Report View

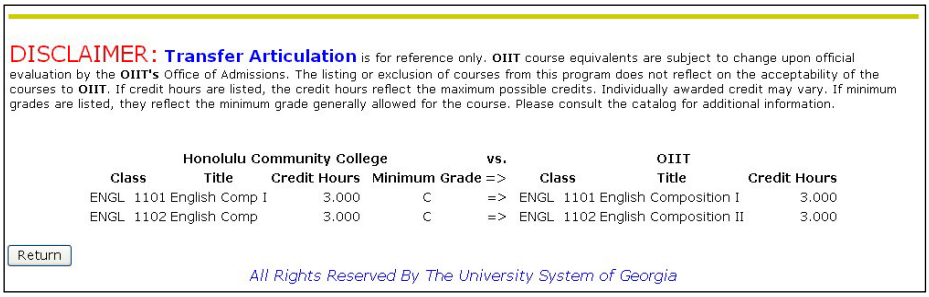
This report displays all classes entered on SHATATR. It may be a large report as it contains information for all subjects.



Subject Report View

Select a subject from the drop-down menu. Subjects are only available on the list if the selected institution has an entry on SHATATR for the specific subject code.

All classes for the specified subject entered on the SHATATR for the selected institution will be displayed.



Both reports list the Class, Title, Credit Hours, and Minimum Grade for the selected institution. The equivalent course lists Class, Title, and Credit Hours. All information is pulled directly from SHATATR. As noted in the Disclaimer, Credit Hours are the maximum possible credits.

Warning

The reports are only as accurate as the information on SHATATR. Each report lists courses with an "Active" code in the Status field. If multiple active entries for the same transferring course exist, only the course with the most current code in the Effective Term field of SHATATR will display. Grouped course equivalents appear with parenthetical logic only if left and right parentheses are entered in the Equivalent Course block on SHATATR.

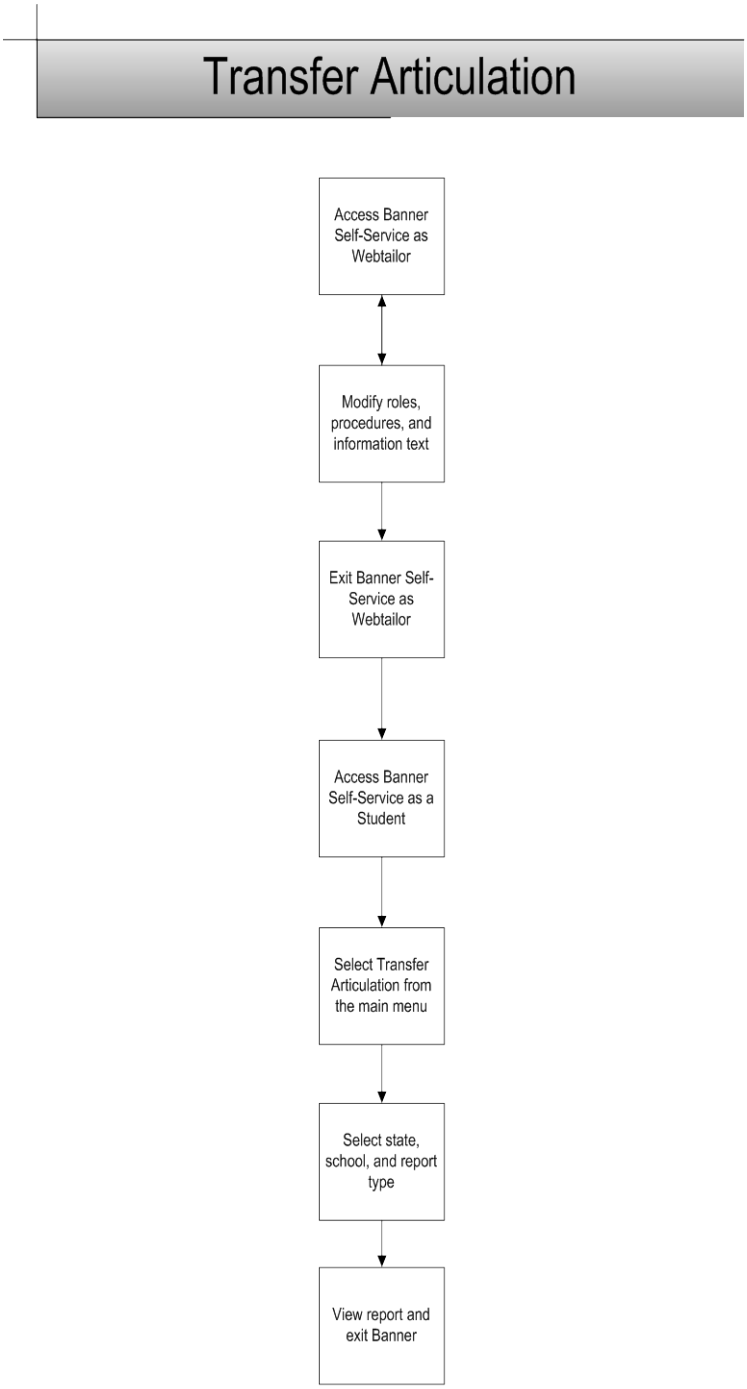
It is extremely important to edit entries in SHATATR to avoid displaying misspelled words, incorrect titles, or incorrect equivalencies.

7. Exit

Exit Banner Self-Service.

Appendix A: Document History

This section details the history of the document and updates made for each modification.

Release and Date	Form/Process	Page	Update Description
Georgia Enhancements 7.9.1, November 1, 2007	NA	All	Original
Georgia Enhancements 8.0, March 31, 2010	NA	ALL	Updated screenshots for 8.0

Appendix B: Process Flow