



**SUNGARD** SCT HIGHER EDUCATION

# SCT Banner Student Transfer Articulation Training Workbook

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## Section A: Introduction

### Lesson: Overview

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#### **Workbook goal**

This course is intended to teach you to identify key forms, tables, and reports in the SCT Banner System. In addition, you will learn to follow key processes and query tables. The workbook is divided into four sections:

- Introduction
- Set-up
- Day-to-day operations
- Reference

#### **Intended audience**

Registrar and/or admissions offices staff, as well as staff members who interface with these offices for the purpose of accomplishing Transfer Articulation

#### **Section contents**

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## Section A: Introduction

### Lesson: Process Introduction

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#### **Introduction**

The Transfer Articulation process of SCT Banner Student allows an institution to pre-define targeted transfer institutions' articulated courses with their institutional equivalencies. This will make transfer credit processing for a student easier. In addition, transfer institutions that are not articulated can easily be defined and transfer courses and equivalencies built during the processing of the student's transfer evaluation.

People who are entered in SCT Banner can have transfer work processed without having to be a recruit, admit or a student. Transfer courses can have GPAs calculated, if appropriate. Transfer institution equivalency information can be printed as a transfer catalog as well.

Before a student's transfer work is rolled to history, thereby printable on a transcript, a transfer worksheet can be printed and reviewed.

If an institution articulates courses based on a program, transfer courses can be articulated specifically to a program.



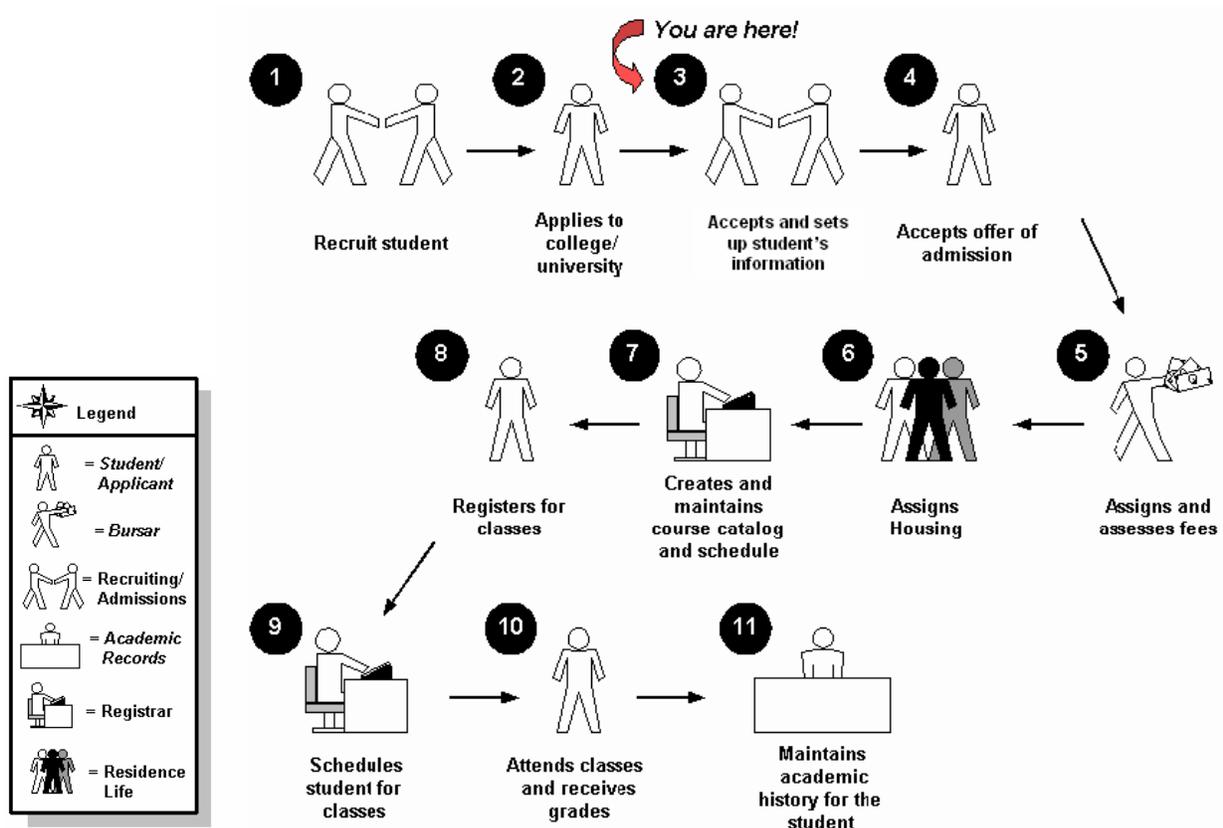
## Section A: Introduction

### Lesson: Process Introduction (Continued)

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#### Flow diagram

This diagram highlights the processes used to enter prospective students into the SCT Banner System within the overall Student process.





## Section A: Introduction

### Lesson: Process Introduction (Continued)

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#### About the process

- Rule and validation forms are set up on the SCT Banner System. Unless a new code is required, this step is performed only once.
- Transfer institutions and their grade schemes must be defined prior to articulating courses.
- Courses can be articulated independently of a person, thus feeder school articulations can be created to facilitate transfer processing for a person.
- A person can have all of his or her transferring institutions evaluated in SCT Banner and coursework can apply towards graduation requirements in CAPP using the equivalencies created in the transfer process. Hours and GPAs can also be calculated for transfer work.



## Section A: Introduction

### Lesson: Terminology

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#### **Feeder school**

Former institutions from which students attended prior to enrolling at your institution.

#### **Equivalencies**

Courses at your institution that are articulated from a transfer institution. The equivalent courses print on the transcript.



## Section B: Set Up

### Lesson: Overview

◀ [Jump to TOC](#)

#### Introduction

The purpose of this section is to outline the set-up process and detail the procedures to set-up your SCT Banner System to handle Transfer Articulation at your institution.

#### Intended audience

Registrar and/or Admissions Office personnel

#### Objectives

At the end of this section, you will be able to

- complete validation forms needed for Transfer Articulation.

#### Prerequisites

To complete this section, you should have

- completed the SCT Education Practices computer-based training (CBT) tutorial “SCT Banner 7 Fundamentals,” or have equivalent experience navigating in the SCT Banner system
- administrative rights to create the rules and set the validation codes in SCT Banner.

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## Section B: Set Up

### Lesson: Validation Forms That Control Transfer Articulation

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#### Types of validation forms needed

Before entering any Transfer Articulation information into the system, several validation forms need to be set up or created.

The validation forms listed below play important roles in the Transfer Articulation process.

Note: The forms that are preceded with an asterisk already have the necessary seed data input in the system and need only to be reviewed.

<b>Form Description</b>	<b>SCT Banner Name</b>
Acceptance Code Validation	STVACPR
*Calendar Type Validation	STVCALD
*Source/Background Institution Code Validation	STVSBGI
*Transfer Level Code Validation	STVTLVL
Institutional Accreditation Status Validation	STVACST
Highest Level of Work Code Validation	STVHLWK
Program Accreditation Code Validation	STVPRGA
Acceptance Authority Code Validation	STVTAAU
Transfer Articulation Course Status Validation	STVTAST



## Section B: Set Up

### Lesson: Acceptance Code Validation

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#### Purpose

The Acceptance Code Validation Form (STVACPR) is used to create and maintain the codes used to indicate the organization's practice of accepting credit from the transferring organization.

#### SCT Banner Form

Acceptance Practice Code Validation STVACPR 7.0 (s4b70)

Code	Description	Activity Date
AG	Credit generally accepted	04-JAN-1991
AP	Credit accepted provisionally	04-JAN-1991
NA	Credit not ordinarily accepted	03-JAN-1995
NP	No policy determined	04-JAN-1991

#### Procedure

Follow these steps to complete the process.

Step	Action
1	Access the Acceptance Code Validation Form (STVACPR).
2	Enter a two-character code in the <b>Code</b> field.
3	Enter a description of the code in the <b>Description</b> field.
4	Click the <b>Save</b> icon.
5	Click the <b>Exit</b> icon.



## Section B: Set Up

### Lesson: Calendar Type Validation

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#### Purpose

The Calendar Type Validation Form (STVCALD) enables you to build the multiplier that will be used when it is necessary to convert from one type of calendar to another. It allows you to convert different credit hour values for organizations with different calendar types.

Note: You only need to review this form, as all of the calendar type data that you need is in the seed data.

#### SCT Banner Form

Code	Description	Multiplier	Activity Date
QTRS	Quarter to Semester	.667	09-NOV-1994
SEMQ	Semester to Quarter	1.500	09-NOV-1994
SQTR	Straight Quarter	1.000	04-JAN-1991
SSEM	Straight Semester	1.000	10-NOV-1994

#### Procedure

Follow these steps to complete the process.

Step	Action
1	Access the Acceptance Code Validation Form (STVACPR).
2	Review the system-provided data.
3	Click the <b>Exit</b> icon.



## Section B: Set Up

### Lesson: Source/Background Institution Code Validation

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#### Purpose

The Source/Background Institution Code Validation Form (STVSBGI) is used to create, update, insert, and delete source/background institution codes. Several other modules use this form to validate these codes.

Note: This form already has the necessary seed data input in the system and only needs to be reviewed. If a new institution needs to be added, follow the procedure shown below.

#### SCT Banner Form

Source or Background Institution	Description	Type	Source Indicator	Admissions Request		EDI	FICE	Voice Response Message Number
000003	Bryn Mawr	C	<input checked="" type="checkbox"/>	CLT1	College Transcript	Y	12345	
002078	Loyola College in MD	C	<input checked="" type="checkbox"/>	CLT1	College Transcript			
002631	Rutgers State Univ - NJ	C	<input checked="" type="checkbox"/>	CLT1	College Transcript			
003754	Virginia Poly Instst & St Univ	C	<input checked="" type="checkbox"/>	CLT1	College Transcript	Y		
0462	Athens Area Technical List	C	<input checked="" type="checkbox"/>	CLT1	College Transcript			
0929	Houston Community College	C	<input checked="" type="checkbox"/>	CLT1	College Transcript	Y		
1005	Auburn University	C	<input checked="" type="checkbox"/>	CLT1	College Transcript	Y	123456	
1008	Alcorn State University	C	<input checked="" type="checkbox"/>	CLT1	College Transcript			
102	Univ of Alaska - Fairbanks	C	<input checked="" type="checkbox"/>	CLT1	College Transcript			
1028	Austin Peay State University	C	<input checked="" type="checkbox"/>	CLT1	College Transcript			
1036	Auburn Univ at Montgomery	C	<input checked="" type="checkbox"/>	CLT1	College Transcript			
10461	Fordham University	C	<input checked="" type="checkbox"/>	CLT1	College Transcript			
1051	Ball State University	C	<input checked="" type="checkbox"/>	CLT1	College Transcript			
1060	Berea College	C	<input checked="" type="checkbox"/>	CLT1	College Transcript			
10866	Carpe Diem University	C	<input checked="" type="checkbox"/>	CLT1	College Transcript			
1094	University of Colorado	C	<input checked="" type="checkbox"/>	CLT1	College Transcript			
10975	Harvard University - Extension	C	<input checked="" type="checkbox"/>	CLT1	College Transcript			
11275	University of Toronto	C	<input checked="" type="checkbox"/>	CLT1	College Transcript			
11315	Mount Saint Vincent	C	<input checked="" type="checkbox"/>	CLT1	College Transcript			
11354	Vista Community College	C	<input checked="" type="checkbox"/>	CLT1	College Transcript			

#### Procedure

Follow these steps to complete the process.

Step	Action
1	Access the Source/Background Institution Code Validation Form (STVSBGI).
2	Perform an <b>Execute Query</b> function.
3	Review the data.  <u>Note:</u> If you do not need to add an institution, you can click the <b>Exit</b> icon now.
4	Perform an <b>Insert Record</b> function.
5	Enter a code in the n the <b>Source/Background Institution</b> field.  <u>Example:</u> For practice, enter your initials.



## Section B: Set Up

### Lesson: Source/Background Institution Code Validation (Continued)

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#### Procedure, continued

Step	Action
6	Enter a description of the code in the <b>Description</b> field.
7	Enter <i>C</i> (for college) in the <b>Type</b> field.
8	Click the <b>Source Indicator</b> checkbox if the institution is a recruiting source.
9	Select <i>CLTI</i> (College Transcript) in the <b>Admissions Request</b> field to add this items to the admissions checklist.
10	Enter <i>Y</i> for Yes or <i>N</i> for No in the <b>EDI</b> field to indicate whether the institution is capable of receiving transcript information electronically via EDI.
11	Enter a number in the <b>FICE</b> field.  <u>Note:</u> The FICE field is used for the Federal Interagency Commission on Education (FICE) Number assigned to each institution. If the FICE code is used as the Source/Background Institution Code, it does not need to be entered in the FICE field. A valid FICE code is required to send transcripts electronically via EDI to those institutions which are capable of receiving them. If a value exists in the FICE field, then this number will be used in the EDI process.
12	Enter a number in the <b>Voice Response Message Number</b> field to assign a number to the recorded message that describes the source/background institution code for telephone applications.
13	Click the <b>Save</b> icon.
14	Click the <b>Exit</b> icon.



## Section B: Set Up

### Lesson: Transfer Level Code Validation

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#### Purpose

The Transfer Level Code Validation Form (STVTLVL) is used to create and maintain the codes used to indicate the level of transfer courses to be articulated from other organizations. It is recommended that levels here be identical to the levels created on the Level Code Validation Form (STVLEVL).

Note: You only need to review this form, as all of the transfer level code validation data that you need is in the seed data.

#### SCT Banner Form

Code	Description	Activity Date
01	Undergraduate	04-JAN-1991
02	Graduate	04-JAN-1991
03	Adult Education	04-JAN-1991
04	First Professional	04-JAN-1991
BZ	Bill Zimmer's test code	03-JUN-2004
UG	Undergraduate	30-DEC-2004

#### Procedure

Follow these steps to complete the process.

Step	Action
1	Access the Transfer Level Code Validation Form (STVTLVL).
2	Review the system-provided data.
3	Click the <b>Exit</b> icon.



## Section B: Set Up

### Lesson: Institutional Accreditation Status Validation

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#### Purpose

The Institutional Accreditation Status Validation Form (STVACST) is used to create and maintain the codes used to indicate the transferring organization's accreditation status.

#### SCT Banner Form

Code	Description	Activity Date
CA	Candidate of Accreditation	03-JAN-1995
IC	Assoc. of Independent Colleges	04-JAN-1991
MS	Middle States Assoc. of C & S	04-JAN-1991
NE	New England Assoc. of C & S	04-JAN-1991
SA	Southern Assoc. of C & S	04-JAN-1991
WA	Western Assoc. of C & S	04-JAN-1991

#### Procedure

Follow these steps to complete the process.

Step	Action
1	Access the Institutional Accreditation Status Validation Form (STVACST).
2	Enter up to a three-character code in the <b>Code</b> field.
3	Enter a description of the code in the <b>Description</b> field.
4	Click the <b>Save</b> icon.
5	Click the <b>Exit</b> icon.



## Section B: Set Up

### Lesson: Highest Level of Work Code Validation

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#### Purpose

The Highest Level of Work Code Validation Form (STVHLWK) is used to create and maintain the codes used to indicate the highest level of work offered by the organization. An example of this may be First Professional Degree.

#### SCT Banner Form

Code	Description	Activity Date
D	Doctor's Degree	04-JAN-1991
II	Two years (Assoc. Degree)	04-JAN-1991
III	Three years	04-JAN-1991
IV	Four years (Baccalaureate)	04-JAN-1991
M	Master's Degree	04-JAN-1991
P	Professional	04-JAN-1991
S	Specialist	04-JAN-1991
U	Unknown	04-JAN-1991
V	Five years	04-JAN-1991

#### Procedure

Follow these steps to complete the process.

Step	Action
1	Access the Highest Level of Work Code Validation Form (STVHLWK).
2	Enter up to a three-character code in the <b>Code</b> field.
3	Enter a description of the code in the <b>Description</b> field.
4	Click the <b>Save</b> icon.
5	Click the <b>Exit</b> icon.



## Section B: Set Up

### Lesson: Program Accreditation Code Validation

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#### Purpose

The Program Accreditation Code Validation Form (STVPRGA) is used to create and maintain the codes used to indicate the programmatic accreditation offered by an organization.

#### SCT Banner Form

Code	Description	Activity Date
AHLTH	Allied Health	04-JAN-1991
ARCH	Architecture	04-JAN-1991
BUS	Business Administration	04-JAN-1991
ENGR	Engineering	04-JAN-1991
JOUR	Journalism	04-JAN-1991
NUR	Nursing	04-JAN-1991
PSY	Psychology	04-JAN-1991

#### Procedure

Follow these steps to complete the process.

Step	Action
1	Access the Program Accreditation Code Validation Form (STVPRGA).
2	Enter up to an eight-character code in the <b>Code</b> field.
3	Enter a description of the code in the <b>Description</b> field.
4	Click the <b>Save</b> icon.
5	Click the <b>Exit</b> icon.



## Section B: Set Up

### Lesson: Acceptance Authority Code Validation

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#### Purpose

The Acceptance Authority Code Validation Form (STVTAAU) is used to create and maintain the codes used to indicate those persons or positions that have the authority to accept transfer courses from other organizations.

#### SCT Banner Form

Code	Description	Activity Date
ACS	Director of Academic Services	04-JAN-1991
ADM	Director of Admissions	04-JAN-1991
DEA	Office of the Deans	04-JAN-1991
OAA	Office of Academic Affairs	04-JAN-1991
REG	Office of the Registrar	04-JAN-1991

#### Procedure

Follow these steps to complete the process.

Step	Action
1	Access the Acceptance Authority Code Validation Form (STVTAAU).
2	Enter up to a three-character code in the <b>Code</b> field.
3	Enter a description of the code in the <b>Description</b> field.
4	Click the <b>Save</b> icon.
5	Click the <b>Exit</b> icon.



## Section B: Set Up

### Lesson: Transfer Articulation Course Status Validation

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#### Purpose

The Transfer Articulation Course Status Validation Form (STVTAST) is used to create and maintain the codes that indicate whether the transfer course is active or inactive. Multiple active and inactive course statuses may be used.

#### SCT Banner Form

Code	Description	Status Indicator	Activity Date
AC	Active Course	<input checked="" type="checkbox"/>	04-JAN-1991
IN	Inactive	<input type="checkbox"/>	04-JAN-1991
PN	Pending Deans Approval	<input type="checkbox"/>	04-JAN-1991
		<input type="checkbox"/>	
		<input type="checkbox"/>	

#### Procedure

Follow these steps to complete the process.

Step	Action
1	Access the Acceptance Authority Code Validation Form (STVTAAU).
2	Enter a two-character code in the <b>Code</b> field.
3	Enter a description of the code in the <b>Description</b> field.
4	Click the <b>Status Indicator</b> checkbox if this is an active course type.
5	Click the <b>Save</b> icon.
6	Click the <b>Exit</b> icon.



## Section B: Set Up

### Lesson: Self Check

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#### Directions

Use the information you have learned in this workbook to complete this self-check activity.

#### Question 1

Which forms necessary for Transfer Articulation have seed data already input in the system?

#### Question 2

The Calendar Type Validation Form (STVCALD) enables you to build the multiplier that will be used when it is necessary to convert from one type of calendar to another.

True or False

#### Question 3

Which form is used to create and maintain the codes used to indicate the level of transfer courses to be articulated from other organizations?

#### Question 4

The Transfer Articulation Course Status Validation Form (STVTAST) is used to create and maintain the codes that

- a) indicate the organization's practice of accepting credit from the transferring organization.
- b) indicate whether the transfer course is active or inactive.
- c) indicate the programmatic accreditation offered by an organization.



## Section B: Set Up

### Lesson: Answer Key for Self Check

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#### Question 1

Which forms necessary for Transfer Articulation have seed data already input in the system?

**The Calendar Type Validation Form (STVCALD)**

**The Source/Background Institution Code Validation Form (STVSBGI)**

**The Transfer Level Code Validation Form (STVTLVL)**

#### Question 2

The Calendar Type Validation Form (STVCALD) enables you to build the multiplier that will be used when it is necessary to convert from one type of calendar to another. (True or False)

**True**

#### Question 3

Which form is used to create and maintain the codes used to indicate the level of transfer courses to be articulated from other organizations?

**The Transfer Level Code Validation Form (STVTLVL) is used to create and maintain the codes used to indicate the level of transfer courses to be articulated from other organizations?**

#### Question 4

The Transfer Articulation Course Status Validation Form (STVTAST) is used to create and maintain the codes that

- indicate the organization's practice of accepting credit from the transferring organization.
- indicate whether the transfer course is active or inactive.**
- indicate the programmatic accreditation offered by an organization.



## Section C: Day-to-Day Operations

### Lesson: Overview

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#### Introduction

The purpose of this section is to explain the regular process and detail the procedures to handle transfer articulation procedures at your institution.

#### Intended audience

- Registrar
- Admissions offices staff
- Staff members who interface with these offices for the purpose of accomplishing transfer articulation

#### Objectives

At the end of this section, you will be able to

- create a transfer articulation institution
- define transfer grades
- transfer courses
- create transfer organization equivalency information
- associate transfer articulated courses to students
- roll equivalent courses to academic history.

#### Prerequisites

To complete this section, you should have

- completed the SCT Education Practices computer-based training (CBT) tutorial “SCT Banner 7 Fundamentals,” or have equivalent experience navigating in the SCT Banner system
- ensure that the rules and validation codes in SCT Banner needed for Transfer Articulation have been set up for you.

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## Section C: Day-to-Day Operations

### Lesson: Overview

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## Section C: Day-to-Day Operations

### Lesson: Process Introduction

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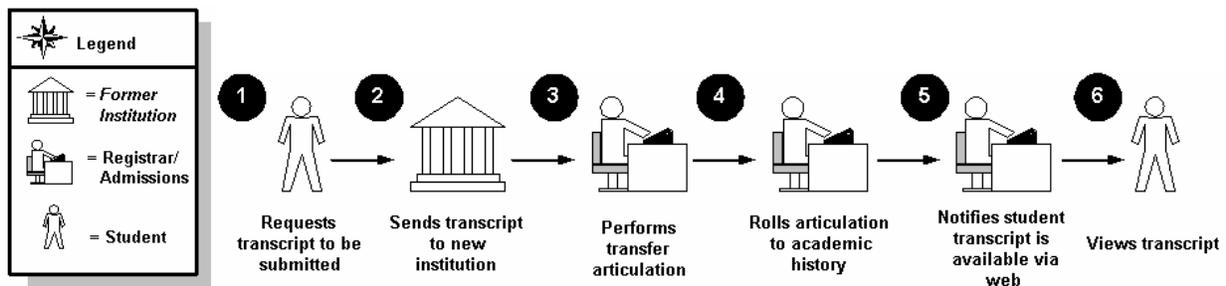
#### About the process

People attending or planning on attending the institution request transcripts sent from former institutions.

Registrar/Admissions offices process the Transfer Articulation for a person. Once the information has been rolled to academic history, the person can be informed to view it on the self service transcript.

#### Flow diagram

This diagram represents a day-to-day perspective of the Transfer Articulation process.



#### What happens

The stages of the process are described in this table

Stage	Description
<b>Student</b>	
1	Requests transcripts to be submitted
<b>Former Institution</b>	
2	Sends transcript to new institution
<b>Registrar/Admissions</b>	
3	Performs Transfer Articulation
4	Rolls articulation to Academic History
5	Notifies student transcript is available via web
<b>Student</b>	
6	Views transcript



## Section C: Day-to-Day Operations

### Lesson: Creating a Transfer Articulation Agreement

◀ [Jump to TOC](#)

#### **Background**

The Transfer Articulation Institution Form (SOABGTA) maintains all the information about the transfer institution based on effective term. ‘From’ and ‘to’ terms are provided on all sections of the form so that the data is maintained as it changes over time. This is handled in the same manner as the effective terms in the catalog module.

For example, if the calendar type of an institution changes from semester to quarter in 2001, then a record for 2000 indicating a semester calendar type and a record for 2001 indicating a quarter calendar type can be created. This allows all courses being presented for transfer in 2000 to be articulated under a semester calendar and all courses being presented for transfer in 2001 to be articulated under a quarter calendar.

The transfer level information is important to the Transfer Articulation process. This section maintains the valid levels of work that will be presented for transfer from the sending institution. This level is used in establishing the valid grades and the way that the grades should be handled in transfer GPA calculations. Again, this section contains a ‘from’ and ‘to’ term to maintain changes over time.

Transfer organization information can be built for either a college or a high school. The transfer organization must be established on the Source/Background Institution Validation Form (STVSBGI) before building data on the Transfer Articulation Institution Form (SOABGTA). Valid transfer levels must be established on this form before creating the valid transfer grades on the Transfer Grade Code Maintenance Form (SHATGRD).



## Section C: Day-to-Day Operations

### Lesson: Creating a Transfer Articulation Agreement (Continued)

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#### Purpose

The Transfer Articulation Institution Form (SOABGTA) is used to capture and maintain information pertaining to the transfer institution and its articulation practices, calendar type, transfer levels, and any comment information. The key to the form is the institution code and the effective term associated with the transfer information.

#### SCT Banner Form

Transfer Articulation Institution SOABGTA 7.0 (s4b70)

Institution:  Term:

---

**General Information**

From Term:  Maintenance To Term:

Highest Degree Level Offered:  Acceptance Practice:

Calendar Type and Multiplier:

Acceptance Authority:  Reported By:

---

**Transfer Levels**

From Term:  Maintenance To Term:

Level	Description
<input type="text"/>	

#### Procedure

Follow these steps to complete the process.

Step	Action
1	Access the Transfer Articulation Institution Form (SOABGTA).
2	Select an institution in the <b>Institution</b> field.
3	Enter the beginning of time (000000) for the term in the <b>Term</b> field.
4	Perform a <b>Next Block</b> function.  <u>Result:</u> The <b>From Term</b> and <b>To Terms</b> will default.
5	Select a value in the <b>Highest Degree Offered</b> field.
6	Select a value in the <b>Acceptance Practice</b> field.
7	Select a value in the <b>Calendar Type and Multiplier</b> field.

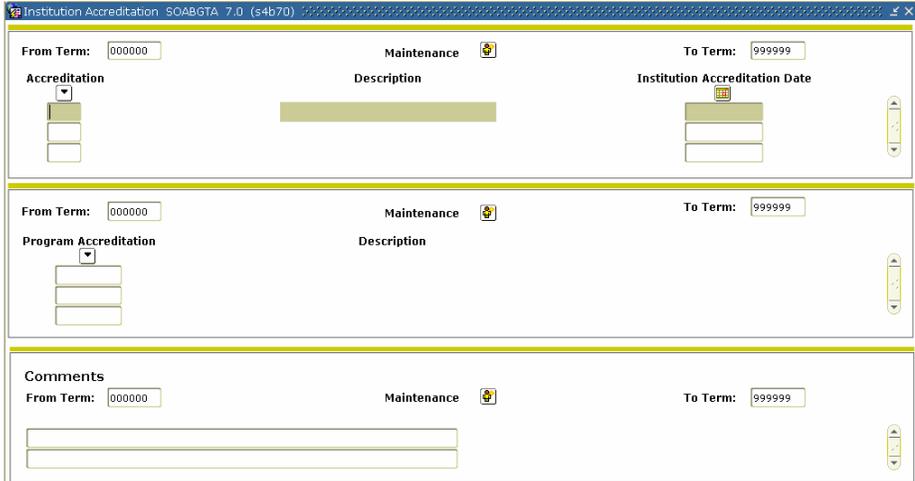


## Section C: Day-to-Day Operations

### Lesson: Creating a Transfer Articulation Agreement (Continued)

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#### Procedure, continued

Step	Action
8	Select a value in the <b>Acceptance Authority</b> field.
9	Select a value in the <b>Level</b> field.
10	Repeat step 11 as needed to enter all levels of work your institution will accept.
11	<p>Perform a <b>Next Block</b> function.</p> <p><u>Result:</u> The Institution Accreditation window opens.</p> 
12	Select a value in the <b>Accreditation</b> field.
13	Enter a date in the <b>Institution Accreditation Date</b> field.
14	Repeat steps 14 and 15 to enter all accreditations for your institution.
15	Select a value in the <b>Program Accreditation</b> field.
16	Repeat step 17 as needed to identify all accredited programs.
17	Enter any comments regarding the institution in the <b>Comments</b> field.
18	Click the <b>Save</b> icon.
19	Click the <b>Exit</b> icon.



## Section C: Day-to-Day Operations

### Lesson: Defining Transfer Grades

◀ Jump to TOC

#### Purpose

The Transfer Grade Code Maintenance Form (SHATGRD) is designed to capture and maintain all the transfer institution's grading symbols and associated quality points. In addition, this form permits the end user to provide the rules governing which hours (e.g., earned, GPA) are affected by the specific grade symbol. The grade codes are stored by level within the institution. If an institution does not compute transfer GPA, quality points and count in GPA are not entered.

#### Grading scheme

A grading scheme must be created for each transfer institution. The grading scheme is the valid set of grades that the sending school uses when grading its courses. To ease the data entry process, a **Default Institution** field has been added to the Key Information of the Transfer Grade Code Maintenance Form (SHATGRD). This allows the grades from a predefined default institution (not a real school) to be copied to another school via the transfer institution code.

Example: The default institution plus/minus is set up with a plus/minus grading scheme (A, A-, B-, B, etc.) that has been created on SHATGRD. Now the University of ABC is being created, and they have the same grading scheme. The transfer institution code from the Source Background Institution Validation Form (STVSBGI) for default institution plus/minus would be entered as the default institution when creating the grades for University of ABC. Then any adjustments, deletions, or additions that may need to be made can be done on the form.

#### Count in

The **Count in** fields provided on SHATGRD is used to define each grade for the transfer institution. The **Institution Grade** and (Grading) **Mode** fields are used for performing an automatic grade code conversion when articulating the transfer work.

Example: Some schools convert all grades during the articulation process to a standard transfer grade such as **TR** with a grade mode of T, regardless of what grade the student received at the sending school. The **Numeric Value** field is used to determine and calculate the minimum grade criteria when articulating courses.



## Section C: Day-to-Day Operations

### Lesson: Defining Transfer Grades (Continued)

◀ Jump to TOC

#### SCT Banner Form

#### Procedure

Follow these steps to define grades that will be transferred from the other institution.

Step	Action
1	Access the Transfer Grade Code Maintenance Form (SHATGRD).
2	Enter the institution in the <b>Institution</b> field.
3	Enter in a transfer grade code in the <b>Transfer Grade</b> field.
4	Select the term this transfer grade became effective in the <b>Effective Term</b> field.  <u>Note:</u> You can select a specific term or use the beginning of time (000000).
5	Enter a level code in the <b>Level</b> field.
6	Enter a grade abbreviation in the <b>Abbreviation</b> field.
7	Enter <i>A</i> for active or <i>I</i> for inactive in the <b>Status Indicator</b> field.
8	Enter a number in the <b>Quality Points</b> field.  <u>Note:</u> If your institution will not compute transfer GPAs, you will not enter quality points or GPA fields.
9	Enter an <i>N</i> for no or <i>Y</i> for yes in the <b>Count In Attempted</b> field.
10	Enter an <i>N</i> for no or <i>Y</i> for yes in the <b>Count In Passed</b> field.
11	Enter an <i>N</i> for no or <i>Y</i> for yes in the <b>Count In Earned</b> field.
12	Enter an <i>N</i> for no or <i>Y</i> for yes in the <b>Count In GPA</b> field.



## Section C: Day-to-Day Operations

### Lesson: Defining Transfer Grades (Continued)

◀ Jump to TOC

#### Procedure, continued

Step	Action						
13	Enter a numeric value associated with this grade in the <b>Numeric Value</b> field.						
14	Enter your institution's grade in the <b>Institution Grade</b> field. <table border="1" data-bbox="289 674 1203 863"><thead><tr><th>IF...</th><th>THEN...</th></tr></thead><tbody><tr><td>actual grades are to be viewed for the transfer courses</td><td>enter the actual grades.</td></tr><tr><td>all grades will be TR for transfer grade</td><td>enter TR.</td></tr></tbody></table>	IF...	THEN...	actual grades are to be viewed for the transfer courses	enter the actual grades.	all grades will be TR for transfer grade	enter TR.
IF...	THEN...						
actual grades are to be viewed for the transfer courses	enter the actual grades.						
all grades will be TR for transfer grade	enter TR.						
15	Enter a grade mode of <i>T</i> in the <b>Grade Mode</b> field.						
16	Click the <b>Save</b> icon.  <u>Note:</u> Repeat this process until all of the necessary transfer grades have been entered into the SCT Banner system.						
17	Click the <b>Exit</b> icon.						





## Section C: Day-to-Day Operations

### Lesson: Transferring Courses (Continued)

◀ Jump to TOC

#### Procedure

Follow these steps to enter courses that will be transferred to your institution.

Step	Action
1	Access the Transfer Institution Catalog Entry Form (SHATATC).
2	Enter the name of the institution courses will be transferred from in the <b>Institution</b> field.
3	Enter a program code only if you will accept different transfer work based on the program that the student is enrolled in at your institution in the <b>Program</b> field.
4	Select the term an equivalent exists for in the <b>Effective Term</b> field.  <u>Example:</u> 200710
5	Enter an appropriate level in the <b>Level</b> field.
6	Enter a subject in the <b>Subject</b> field.  <u>Note:</u> This should be the same code as reflected on the transfer institution's transcript.
7	Enter the course number in the <b>Course</b> field.
8	Enter a status code in the <b>Course Status</b> field to indicate if this course is active or inactive.
9	Enter a title for the course in the <b>Title</b> field.
10	The <b>Equivalencies Exist</b> field will default when course equivalencies are added.
11	Enter the lowest and highest (lowest only hours set) hours that will be accepted for the course in the <b>Credits Low</b> and <b>High</b> fields.
12	Enter the minimum grade that will be transferred in the <b>Minimum Grade</b> field.  <u>Note:</u> This grade must be defined on SHATGRD.
13	Enter a catalog reference for the institution in the <b>Catalog</b> field.
14	Enter a comment in the <b>Comments</b> field.
15	Click the <b>Save</b> icon.
16	Perform a <b>Rollback</b> function.  <u>Note:</u> Repeat these steps to enter 2 or 3 more courses.
17	Click the <b>Save</b> icon.
18	Click the <b>Exit</b> icon.



## Section C: Day-to-Day Operations

### Lesson: Creating Transfer Organization Equivalency Information

◀ Jump to TOC

#### Purpose

Equivalent courses are added and maintained on the Transfer Course Articulation Form (SHATATR). The Transfer Institution Catalog Entry Form (SHATATR) is used to allow for the creation and maintenance of both the transfer course information and the equivalent course data for a transfer institution.

Equivalent courses may be singular, such as ACCT 101 is equivalent to ACCT 51, or multiple, such as ENGL 100 is equivalent to ENGL 100 and ENGL 102. An OR condition is also available so that PSYC 101 may be equivalent to PSYC 110 or BIOL 101. In an OR condition, upon saving the articulation a pop up window will appear displaying and allowing a choice of which course to populate as the equivalency when performing the articulation process. Parenthesis may also be used when creating course equivalencies to group together the appropriate course equivalencies.

Equivalent course comments may be added and maintained for each course in the Institution Course Comments window for any equivalent course on SHATATR. Use a List function from the Subject field in the Equivalent Course section of SHATATR to see the valid subjects and a Count Query Hits function to see existing courses that are in the catalog for the effective term.

#### SCT Banner Form

Transfer Course Articulation SHATATR 7.1

Institution:  Carpe Diem University      Program:

---

**Transferring Course**

Equivalence	Group	Primary	Subject	Course	Title	Effective Term	Level	Status	Minimum Grade	Transferred Low	Credits High
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>							
Transfer Catalog: <input type="text"/>										Converted: <input type="text"/>	

---

**Equivalent Course**

And/Or	Left Parenthesis	Subject	Course	Title	Catalog Low	Catalog High	Credits Used	Right Parenthesis
<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>	<input type="checkbox"/>					
<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>	<input type="checkbox"/>					
<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>	<input type="checkbox"/>					

---

Attributes Code	Description	Comments
<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>



## Section C: Day-to-Day Operations

### Lesson: Creating Transfer Organization Equivalency Information (Continued)

◀ Jump to TOC

#### Procedure

Follow these steps to assign equivalency courses to those courses created in the previous procedure.

Step	Action
1	Access the Transfer Course Articulation Form (SHATATR).
2	Enter the institution you have been working with in the <b>Institution</b> field.
3	Perform a <b>Next Block</b> function.  <u>Note:</u> The courses you added in the Transfer Institution Catalog Entry Form (SHATATC) should display once the organization is selected and a <b>Next Block</b> function is performed.  <u>Note:</u> The Transferring Course block displays the courses entered in the previous procedure. Use the scroll bar to view all of them.
4	Perform a <b>Next Block</b> function.
5	Select an equivalent course from your catalog for each of the courses in the <b>Course</b> field.
6	Click the <b>Save</b> icon.
7	Perform a <b>Previous Block</b> function.
8	Perform a <b>Next Record</b> function to access the next transferring course.  Now repeat steps 5, 6, and 7 above until all equivalencies have been entered and saved.
9	Click the <b>Exit</b> icon.



## Section C: Day-to-Day Operations

### Lesson: Associating a Transfer Institution to a Student

◀ Jump to TOC

#### Purpose

Information about each transfer institution and attendance period is captured using a two-position short hand notation to identify each entry. The attendance periods entered must pertain to a specific student level (e.g., undergraduate, graduate). If a student had taken graduate and undergraduate course work at the same institution, and you wished to capture this information, it would be necessary to identify two attendance periods: one for the undergraduate work and one for the graduate work. Optionally, the user may define multiple attendance periods relating to the same level if the need arises.

The student must have been added to the system via the General Person Identification Form (SPAIDEN).

The Transfer Course Form (SHATRNS) is used to capture and maintain information relating to transfer institutions for a student.

#### SCT Banner Form

The screenshot shows the SHATRNS 7.0 web interface. At the top, there are fields for ID (210009502) and Cuspin, Lorie. To the right, there are dropdown menus for Transfer Institution Number (1) and Attendance Period Number (1). Below this is a section titled "Transfer Institution" with a dropdown for Institution (2125, Delaware County Cmty College), a date field for Transcript Receipt Date, and an "Official" checkbox. The next section is "Transfer Attendance Period" with fields for Attendance Period (Fall 1993), Acceptance Date (05-FEB-1995), Effective Term (199510, Fall 1994 (199510)), Term Type, Apply to Level (CR, Credit), Transfer Degree, Attendance Begin Date, and Attendance End Date.



## Section C: Day-to-Day Operations

### Lesson: Associating a Transfer Institution to a Student (Continued)

◀ Jump to TOC

#### Procedure

Now that you have created all the necessary Transfer Articulation organization information, you are ready to associate this information with a student.

Follow these steps to complete the evaluation process.

Step	Action
1	Access the Transfer Course Form (SHATRNS).
2	Enter a student's ID in the <b>ID</b> field or click the <b>Search</b> icon to search for a student.
3	Enter the transfer organization number in the <b>Transfer Institution Number</b> field.
4	Enter an attendance period number in the <b>Attendance Period Number</b> field.
5	Perform a <b>Next Block</b> function.
6	Enter the institution you have been working with in the <b>Institution</b> field of the Transfer Institution block.
7	Click the <b>Official</b> checkbox if the transcript is official.
8	Click the <b>Save</b> icon.
9	Access the Transfer Attendance Period block.
10	Enter a value in the <b>Attendance Period</b> field.
11	The <b>Acceptance Date</b> field defaults to today's date.
12	Select an appropriate term in the <b>Effective Term</b> field.
13	Enter a term type in the <b>Term Type</b> field.  <u>Example:</u> Semester or quarter.
14	Select a value in the <b>Apply to Level</b> field.  <u>Example:</u> Undergraduate.
15	Select a value in the <b>Transfer Degree</b> field if the student has received a degree from the transfer institution.
16	Enter the dates the student began attending the previous institution in the <b>Attendance Begin Date</b> field.
17	Enter the dates the student finished attending the previous institution in the <b>Attendance End Date</b> field.
18	Click the <b>Save</b> icon.
19	Click the <b>Exit</b> icon.





## Section C: Day-to-Day Operations

### Lesson: Associating Courses with a Student's Record (Continued)

◀ Jump to TOC

#### Procedure

Follow these steps to associate the courses that will be transferred to a student's record.

Step	Action
1	Access the Transfer Articulation Evaluation Form (SHATAEQ).
2	Enter the student's ID in the <b>ID</b> field, or use the <b>Search</b> icon to search for a transfer student.
3	Select the transfer institution number in the <b>Institution</b> field.
4	Perform a <b>Next Block</b> function.
5	Select a value in the <b>Period</b> field.
6	Select a term in the <b>Term</b> field.
7	Select a level in the <b>Level</b> field.
8	Select a subject code in the <b>Subject</b> field in the Transfer section.
9	Select a course code in the <b>Course</b> field.
10	Enter the number of credit hours in the <b>Credit Hours</b> field.
11	Select a grade code in the <b>Grade</b> field.
12	Click the <b>Save</b> icon.
13	Select <u>Perform Articulation</u> from the <b>Options</b> menu.
14	Click the <b>Save</b> icon.
15	Perform a <b>Next Block</b> function to view data in the Equivalent Course GPA Information block.  <u>Note:</u> You should see total hours to be rolled to History.
16	Perform a <b>Next Block</b> function to access the Equivalent Roll block.
17	Enter a <i>Y</i> in the <b>Roll to History</b> field.
18	Click the <b>Save</b> icon to dynamically roll the courses to the SHATRNS form in Academic History.
19	Click the <b>Exit</b> icon.



## Section C: Day-to-Day Operations

### Lesson: Summary

◀ [Jump to TOC](#)

#### Let's review

As a result of completing this workbook, you have

- reviewed and created validation forms that control transfer articulation
- created a transfer articulation institution
- defined transfer grades
- transferred courses
- created transfer organization equivalency information
- associated transfer articulation courses to a student
- rolled equivalent courses to academic history.

Now you are ready to begin determining what information related to transfer institutions and their courses will be implemented within the SCT Banner Student Transfer Articulation module. Decisions will need to be made based upon your organization's needs as to which code validation forms and control and rules forms will be used as well as what your values will be on these forms.



## Section C: Day-to-Day Operations

### Lesson: Self Check

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#### Directions

Use the information you have learned in this workbook to complete this self-check activity.

#### Question 1

The transfer organization must be established on which validation form before building data on the Transfer Articulation Institution Form (SOABGTA).

#### Question 2

(fill in the blank) and (fill in the blank) terms are provided on all sections of the form so that the data is maintained as it changes over time.

#### Question 3

If more than one transfer course is required to equate to one or more courses at the institution, a (fill in the blank) is required.

#### Question 4

Equivalent transfer courses may be singular, such as ACCT 101 is equivalent to ACCT 51, or multiple, such as ENGL 100 is equivalent to ENGL 100 and ENGL 102

True or False

#### Question 5

What form is used to add a student to SCT Banner to associate the transfer institution to a student?

#### Question 6

Transfer courses must exist on the Transfer Course Articulation Form (SHATATR) to be entered on the Transfer Articulation Evaluation Form (SHATAEQ)

True or False



## Section C: Day-to-Day Operations

### Lesson: Answer Key for Self Check

◀ Jump to TOC

#### Question 1

The transfer organization must be established on which validation form before building data on the Transfer Articulation Institution Form (SOABGTA).

**The Source/Background Institution Validation Form (STVSBGI)**

#### Question 2

*(fill in the blank)* and *(fill in the blank)* terms are provided on all sections of the form so that the data is maintained as it changes over time.

***From and to terms are provided on all sections of the form so that the data is maintained as it changes over time.***

#### Question 3

If more than one transfer course is required to equate to one or more courses at the institution, a *(fill in the blank)* is required

**If more than one transfer course is required to equate to one or more courses at the institution, a *group code* is required.**

#### Question 4

Equivalent transfer courses may be singular, such as ACCT 101 is equivalent to ACCT 51, or multiple, such as ENGL 100 is equivalent to ENGL 100 and ENGL 102 (True or False)

**True**

#### Question 5

Which form must be used to add a student to SCT Banner to associate the transfer institution to a student?

**The student must have been added to the system via the General Person Identification Form (SPAIDEN).**



## Section C: Day-to-Day Operations

### Lesson: Answer Key for Self Check (Continued)

◀ [Jump to TOC](#)

#### Question 6

Transfer courses must exist on the Transfer Course Articulation Form (SHATATR) to be entered on the Transfer Articulation Evaluation Form (SHATAEQ) (True or False)

**False. Transfer courses do not have to exist on the Transfer Course Articulation Form (SHATATR) to be entered on the Transfer Articulation Evaluation Form (SHATAEQ).**



## Section D: Reference

### Lesson: Overview

◀ [Jump to TOC](#)

#### **Introduction**

The purpose of this section is to provide reference materials related to the workbook.

#### **Section contents**

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## Section D: Reference

### Lesson: Setup Forms and Where Used

◀ Jump to TOC

#### Guide

Use this table as a guide to the setup forms and the day-to-day forms that use them.

Setup Form		Day-to-Day Form(s)	
Form Name	Code	Form Name	Code
Acceptance Code Validation	STVACPR	Transfer Articulation Institution Form	SOABGTA
Calendar Type Validation	STVCALD	Transfer Articulation Institution Form	SOABGTA
		Transfer Institution Catalog Entry Form	SHATATC
		Transfer Course Articulation Form	SHATATR
		Transfer Course Form	SHATRNS
Source/Background Institution Code Validation	STVSBGI	Transfer Articulation Institution Form	SOABGTA
		Transfer Grade Code Maintenance Form	SHATGRD
		Transfer Institution Catalog Entry Form	SHATATC
		Transfer Course Articulation Form	SHATATR
		Transfer Course Form	SHATRNS
		Transfer Articulation Evaluation Form	SHATAEQ
Transfer Level Code Validation	STVTLVL	Transfer Articulation Institution Form	SOABGTA
		Transfer Grade Code Maintenance Form	SHATGRD
		Transfer Institution Catalog Entry Form	SHATATC
		Transfer Course Articulation Form	SHATATR
		Transfer Course Form	SHATRNS
Institutional Accreditation Status Validation	STVACST	Transfer Articulation Institution Form	SOABGTA
Highest Level of Work Code Validation	STVHLWK	Transfer Articulation Institution Form	SOABGTA



## Section D: Reference

### Lesson: Setup Forms and Where Used (Continued)

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Set Up Form		Day-to-Day Form(s)	
Form Name	Code	Form Name	Code
Program Accreditation Code Validation	STVPRGA	Transfer Articulation Institution Form	SOABGTA
Acceptance Authority Code Validation	STVTAAU	Transfer Articulation Institution Form	SOABGTA
Transfer Articulation Course Status Validation	STVTAST	Transfer Grade Code Maintenance Form	SHATGRD
		Transfer Institution Catalog Entry Form	SHATATC
		Transfer Course Articulation Form	SHATATR



## Section D: Reference

### Lesson: Day-to-Day Forms and Setup Needed

◀ Jump to TOC

#### Guide

Use this table as a guide to the day-to-day forms and the setup forms needed for each.

Day-to-Day Form	Setup Forms Needed
Transfer Articulation Institution Form (SOABGTA)	<ul style="list-style-type: none"> <li>• Source/Background Institution Validation Form (STVSBGI)</li> <li>• Acceptance Code Validation (STVACPR)</li> <li>• Calendar Type Validation (STVCALD)</li> <li>• Transfer Level Code Validation (STVTLVL)</li> <li>• Institutional Accreditation Status Validation (STVACST)</li> <li>• Highest Level of Work Code Validation (STVH LWK)</li> <li>• Program Accreditation Code Validation (STVPRGA)</li> <li>• Acceptance Authority Code Validation (STVTAAU)</li> </ul>
Transfer Grade Code Maintenance Form (SHATGRD)	<ul style="list-style-type: none"> <li>• Source/Background Institution Validation Form (STVSBGI)</li> <li>• Transfer Level Code Validation (STVTLVL)</li> </ul>
Transfer Institution Catalog Entry Form (SHATATC)	<ul style="list-style-type: none"> <li>• Source/Background Institution Validation Form (STVSBGI)</li> <li>• Calendar Type Validation (STVCALD)</li> <li>• Transfer Level Code Validation (STVTLVL)</li> <li>• Transfer Articulation Course Status Validation (STVTAST)</li> </ul>
Transfer Course Articulation Form (SHATATR)	<ul style="list-style-type: none"> <li>• Source/Background Institution Validation Form (STVSBGI)</li> <li>• Calendar Type Validation (STVCALD)</li> <li>• Transfer Level Code Validation (STVTLVL)</li> <li>• Transfer Articulation Course Status Validation (STVTAST)</li> </ul>



## Section D: Reference

### Lesson: Day-to-Day Forms and Setup Needed (Continued)

◀ [Jump to TOC](#)

<b>Day-to-Day Form</b>	<b>Setup Forms Needed</b>
Transfer Course Form (SHATRNS)	<ul style="list-style-type: none"><li>• Source/Background Institution Validation Form (STVSBGI)</li><li>• Calendar Type Validation (STVCALD)</li><li>• Transfer Level Code Validation (STVTLVL)</li></ul>
Transfer Articulation Evaluation Form (SHATAEQ)	<ul style="list-style-type: none"><li>• Source/Background Institution Validation Form (STVSBGI)</li><li>• Transfer Grade Code Maintenance Form (SHATGRD)</li></ul>



## Section D: Reference

### Lesson: Forms Job Aid

◀ Jump to TOC

#### Guide

Use this table as a guide to the forms used in this workbook. The Owner column may be used as a way to designate the individual(s) responsible for maintaining a form.

<b>Form Name</b>	<b>Form Description</b>	<b>Owner</b>
STVACPR	Acceptance Code Validation	
STVCALD	Calendar Type Validation	
STVSBGI	Source/Background Institution Code Validation	
STVTLVL	Transfer Level Code Validation	
STVACST	Institutional Accreditation Status Validation	
STVH LWK	Highest Level of Work Code Validation	
STVPRGA	Program Accreditation Code Validation	
STVTAAU	Acceptance Authority Code Validation	
STVTAST	Transfer Articulation Course Status Validation	



## Release Date

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This workbook was last updated on 09/01/2005.