

How to enter transfer work information

Overview	2
Two workflows for SHATRNS tasks.	3
How to update transfer work information	4
Before you start.	4
Accessing student transfer records.	4
Creating transfer work information.	6
Updating transfer work information	7
Verifying updated information	9
How to remove information	10
The SHATRNS form	11
Key Block field descriptions	12
Transfer Institution field descriptions	12
Transfer Attendance Period field descriptions	13
Transfer Course Detail field descriptions	14
Equivalent Course Detail Block field descriptions	15
Equivalent Course Attributes field descriptions	17
Attendance Period GPA field descriptions	18
Troubleshooting	19



How to enter transfer work information



Overview

The SHATRNS form allows users to view and create records of a student's transfer work. SHATRNS holds several pieces of information that affect student academic history and display on student transcripts.

SHATRNS is also the form in which users enter updates or corrections to transfer course information. The modification process is often initiated by viewing the transcript to find errors. The field where information is saved determines the how the modification is completed.

To modify information in...	Then you must...
<ul style="list-style-type: none"> • Apply to Level field • Effective Term field • Institution field 	<ol style="list-style-type: none"> 1 Delete all attached information from the last block to the first (see "How to remove information" on page 10) 2 Reenter all field values (see "Updating transfer work information" on page 7)
<ul style="list-style-type: none"> • Attendance Period field • Term Type field • Attribute field • Fields in the Equivalent Course Detail block 	Modify field values and immediately save your work

The procedure "How to enter transfer work information" instructs users who are creating records as well as those who are only modifying existing ones. However, users modifying information may also need to consult the procedure "How to remove informations outlined at the top of the table.



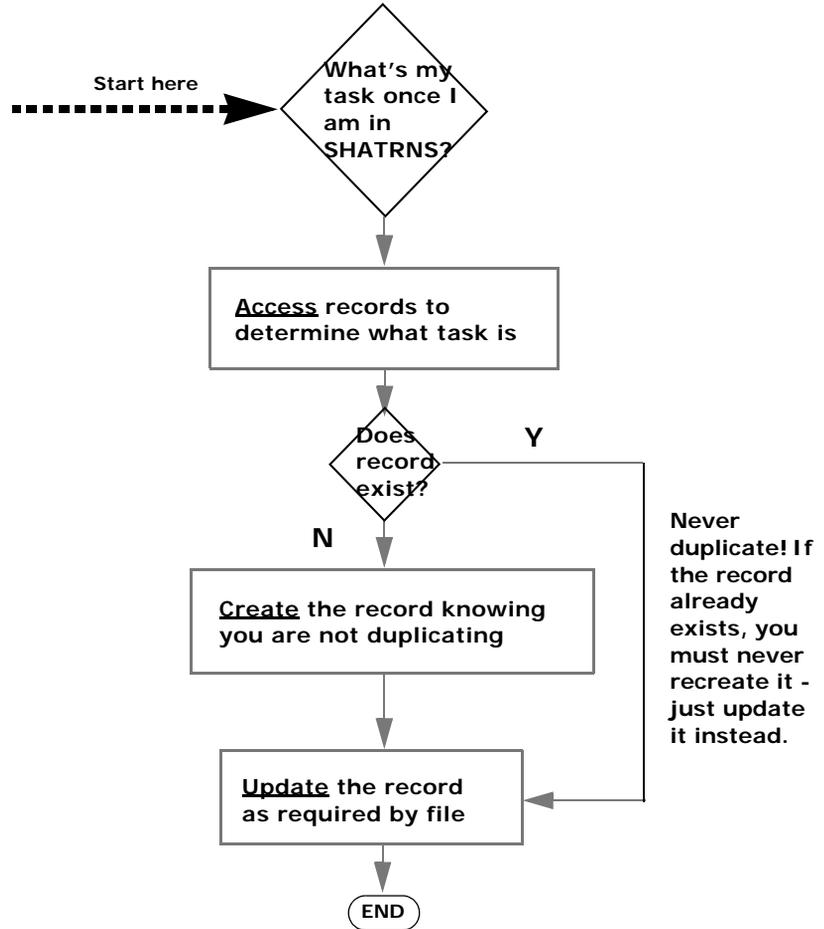
Two workflows for SHATRNS tasks

Your possible tasks:

I am *accessing* then I am creating **and** updating

OR

I am *accessing* and then I am updating





How to update transfer work information

Before you start

Before you proceed, you will need the following information:

- term of the credits to be transferred
- equivalent course information
- the transfer institution name (its code is available in SOISBGI)
- the attendance period (see Field descriptions)

Accessing student transfer records

- 1 Enter SHATRNS in the **Go** field on the **Main Menu** or choose the **Student FastTrack Menu > Academic History > SHATRNS**.
- 2 Enter the student's McGill ID, if known, or double-click the magnifying glass  beside **ID** to access GVIFIDN and search for the student.

Transfer Course Information SHATRNS 6.1 (BanUP6G)

ID: 

Transfer Institution Number:  Attendance Period Number: 

Transfer Institution

Institution: 

Transcript Receipt Date:

Official

Transfer Attendance Period

Attendance Period: Acceptance Date:

Effective Term: Attendance Dates

Term Type: Begin:

Apply to Level: End:

Transfer Degree:

How to update transfer work information



- 3 Enter the **TIN (Transfer Institution Number)** followed by the **Attendance Period Number** by consulting the queries automatically executed and displayed for student entered:
 - a Click the  beside the **TIN** field.
 - b Access the SHQTRIT form and select the **Sequence No** of the desired transfer institution (or simply double-click on the number) to bring the number back into the **TIN** field on SHATRNS.

Note

If the search results on SHQTRIT do not include the information that you are looking for, exit the query form and use the next sequential number as the **TIN**. Then proceed to "Creating transfer work information" to record the missing information.

Sequence No	Institution	Description	Activity Date
1	ZZZZZZ	Pre Banner Institution	12-JUL-2002
2	028823	Concordia University	13-OCT-2005

- c Click  beside the **Attendance Period Number (APN)** field to choose the number for the transfer work on the SHQTRAM form. Double-click the number to bring it back to SHATRNS.

Note

If the search results on SHQTRAM do not include the information that you are looking for, exit the query form and use the next sequential number as the **APN**. Then proceed to "Creating transfer work informa-

How to update transfer work information



tion” to record the missing information.

Sequence No	Institution	Description	Activity Date
2	028823	Concordia University	13-OCT-2005

Transfer Attendance Period				
Attendance Period No	Applied to Level	Attendance Period	Acceptance Date	Activity Date
1	UG Undergraduate	P	13-OCT-2005	13-OCT-2005

- 4 Click **Next Block**  twice or Ctrl + Page Down twice and proceed to “Updating transfer work information”.

Creating transfer work information

- 1 **Next Block** to the Transfer Institution block.
- 2 Specify its name of the new institution you have entered in **Institution** (first field).

If not, click  to find the code:

Conduct an institution search by entering criteria and then pressing F8 or clicking the **Execute Query**  button.



Incorporate the wildcard % into the value you enter in the **Source/Background Institution** field, such as %Concordia% to search for Concordia University. Make sure you capitalize the name of the school - this is a case-sensitive search.

- a Double click the desired institution to bring it back to SHA-TRNS.
- 3 Verify that the code is correct by checking the description that appears beside it.
 - 4 Save the verified addition by pressing F10 or clicking **Save** .
 - 5 Click the **Next Block** button or Ctrl + Page Down.



Updating transfer work information

- 1 Enter, or modify as the case may be, the required fields, including **Attendance Period**, **Effective Term**, and **Apply To Level**.

Remember:

To modify information in...	Then you must...
<ul style="list-style-type: none"> • Apply to Level field • Effective Term field 	See "How to remove information" on page 10
<ul style="list-style-type: none"> • Attendance Period field • Term Type field 	No specific procedure required. Modify field values on-the-fly

- 2 **Save**.
- 3 **Next Block** to the Transfer Course Detail window.

- 4 If the fields in Transfer Course Detail are already populated, **Next Block** to Equivalent Course Detail.

If not, enter **000** into the **Transcript Seq** field, **Save** and then **Next**

How to update transfer work information



Block to the Equivalent Course Detail block.

- 5 Check all existing records. If necessary, use the vertical scroll bar at the right to view them.

If you need to add new records, add one as needed by selecting **Record > Insert** or clicking **Insert Record** .

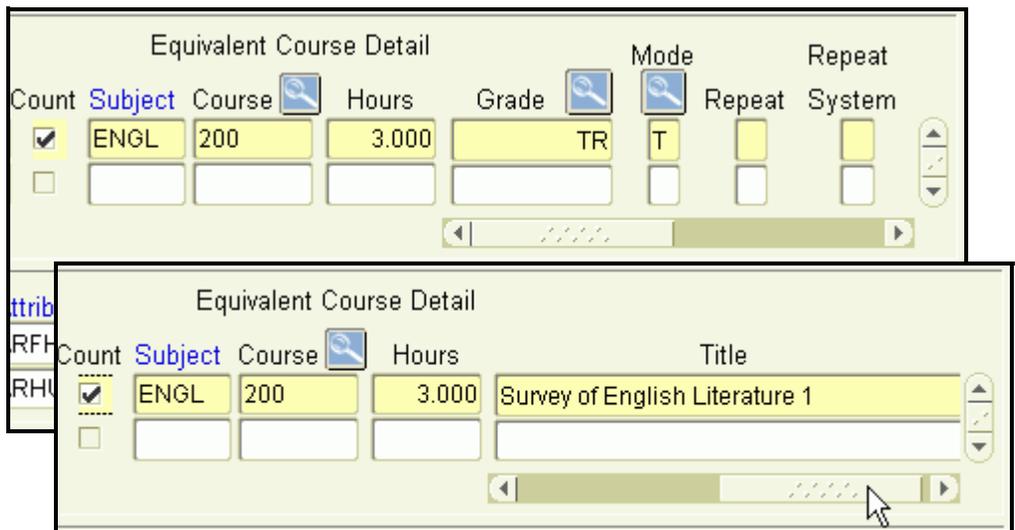
- 6 Update the information for each equivalent course entry:
 - a Check **Count**.
 - b Enter, or modify as the case may be, the **Subject, Course** and **Hours**.

To modify information in...	Then you must...
Fields in the Equivalent Course Detail block	No specific procedure required. Modify field values on-the-fly

- c Ensure **Grade** is set to TR, EX, XTR or XEX and **Mode** is set to T.

Note The convention for entering transfer grades requires that all EX and XEX grades correspond to exactly 0.000 credits in the **Hours** field.

- d Scroll or <Tab> to the **Title** field. It should be populated if the course has an auto-generated title. If not, enter 'T'.



- e **Save**.

- 7 **Next Block** to the Equivalent Course Attributes block.
- 8 Update each **Attribute** to reflect the course (highlighted in yellow in the

How to update transfer work information



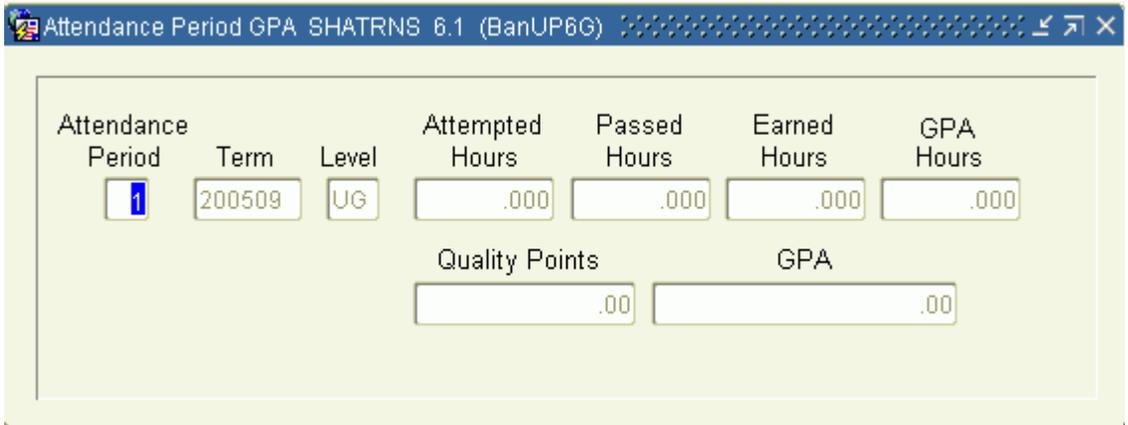
Equivalent Course Detail block) that it is attached to:

- a If necessary, delete any automatically-generated code that you do not wish to apply.
- b Double-click in **Attribute** to look up the code. Select it and click **OK**.
If it has not been added to the table, click **Cancel** and enter the correct 4-character code into the field.
- c **Save**.

If necessary, repeat these steps to review each additional Equivalent Course Detail record. (Click **Previous Block**  and then select the additional record for review.)

Verifying updated information

- 1 **Next Block** to Attendance Period GPA (view only) block.



Attendance Period	Term	Level	Attempted Hours	Passed Hours	Earned Hours	GPA Hours
1	200509	UG	.000	.000	.000	.000

Quality Points	GPA
.00	.00

- 2 Verify that the correct amount of credits have been applied by checking the **Earned Hours** field.
- 3 **Exit**.



How to remove information

In order to remove information, you must delete the record, starting with information entered in the last block.

Example: You realize you entered the wrong transfer institution after saving and verifying the record in the Attendance Period GPA block. As a result, you would:

- 1 Go to the **Equivalent Course Detail** block.
- 2 Delete the existing record by selecting **Record > Remove** or by clicking **Delete Record** .
- 3 Repeat step 2 for the Transfer Course Detail block, then for the Transfer Attendance Period block, and finally for the Transfer Institution block.
- 4 Enter the correct transfer institution.

Note

If you remove and then re-add values to a SHATRNS field, remember that the attributes will need to be re-entered on the Equivalent Course Attributes block.

The SHATRNS form



The SHATRNS form

The SHATRNS form consists of three separate windows. The first window has three information blocks: the key block (fields 1-3 below), plus the Transfer Institution and Transfer Attendance Period blocks.

The screenshot shows the 'Transfer Course Information SHATRNS 6.1 (BanUP6G)' window. It is divided into three main sections:

- Key Block:** Contains fields for ID (1), Transfer Institution Number (2), and Attendance Period Number (3). There are search icons next to the institution and attendance period fields.
- Transfer Institution Block:** Contains an Institution field (4), a Transcript Receipt Date field (5), and an Official checkbox (6).
- Transfer Attendance Period Block:** Contains fields for Attendance Period (7), Acceptance Date (8), Effective Term (9), Term Type (10), Apply to Level (11), and Transfer Degree (12). It also includes an Attendance Dates section with Begin (13) and End fields.



Key Block field descriptions

	Item	Description
1	ID (Required)	A 9-digit McGill Identification Number. Person must exist in the database but does not need to have a General Student record.
2	Transfer Institution Number (Required)	<p>A 2-digit code used for ordering each former institution that holds transferable work for an identified student.</p> <p>The TIN appears on the referenced SHQTRIT (Transfer Institutions by Person Query) form as the Sequence No. When you select the Sequence No on the query form it displays as the TIN in the key block.</p>
	<i>Note</i>	
3	Attendance Period Number (Required)	<p>A 2-digit code used for ordering each attendance period at a former institution that holds transferable work for an identified student.</p> <p>You select the APN from the referenced SHQTRAM (Transfer Attendance Periods by Person Query) form.</p>

Transfer Institution field descriptions

	Item	Description
4	Institution (Required)	<p>Two fields: The 6-digit institution code and the name of the institution that holds transferable work for an identified student.</p> <p>The institution code for all CEGEPs is 'C' followed by 5 digits; all advanced placement type of institutions is 'T' followed by 5 digits.</p>
	<i>Note</i>	
5	Transcript Receipt Date	Not used at McGill.
6	Official	Not used at McGill.



Transfer Attendance Period field descriptions

	Item	Description
7	Attendance Period (Required)	<p>Indicates whether transfer credits are pre-admission or post-admission for government reporting statistics (GDEU). Determines the location of transfer credits within a term on the transcript. Do not enter characters other than 'a', 'p' or 't' (upper or lower case).</p> <p>A — transfer credits relate to admissions</p> <p>P — post-admission</p> <p>T — post-admission but prior to Inter-Faculty transfer where the transfer alters transfer credits (such as the transfer credits taken by a student during summer after first year at McGill that are were recognized for credit by faculty at the time)</p>
8	Acceptance Date	Not used at McGill.
9	Effective Term (Required)	<p>The term to which transfer credits will be applied, such as 200309.</p> <p>The student does not need to be registered in institutional courses for the term to which transfer credits are applied.</p> <div data-bbox="354 857 435 933" style="border: 1px solid black; padding: 2px; width: fit-content;"> <i>Note</i> </div> <p>For pre-admission transfer credits, enter the term of admission to the program to which the transfer credits apply. Transfer credits will display on other parts of the system for the term that has been selected as the effective term.</p>
10	Term Type	<p>The type of term. McGill students who are visiting another school on the IUT agreement as a Study Away student or as an Exchange students use IUT, Study Away or Exchange as the term type.</p> <p>Otherwise nothing is required to be entered in this field.</p>
11	Apply to Level (Required)	The level to which transfer credits will be applied. The transfer credits will count in the credit total of the selected level.
12	Transfer Degree	Not used at McGill.
13	Attendance Dates	Not used at McGill.

The SHATRNS form



The second SHATRNS window features another three blocks of information: the Transfer Course Detail block (fields 1-9), the Equivalent Course Detail block and the Equivalent Course Attributes block.

Transfer Course Detail field descriptions

It is not recommended to enter transfer with data in the nine fields of this block, as it will not appear on the transcript. However, to satisfy system requirements you must type in **000** in the **Transcript Seq** field to navigate through the rest of the form.

Item	Description
1 Transcript Seq (Required)	A sequence number. 000 — Displays system-generated remark No Transcript Detail. This is the recommended procedure since McGill does not add this information from this block to the transcript.
2 Subject Area Desc	Not currently used at McGill.



	Item	Description
3	Course Number(s)	Not currently used at McGill.
4	Hours	Not currently used at McGill.
5	Grade	Not currently used at McGill.
6	Duplicate	Not currently used at McGill.
7	Group	Not currently used at McGill.
8	Primary	Not currently used at McGill.
9	Title	Not currently used at McGill.

Equivalent Course Detail Block field descriptions

When information is saved in this block, it is displayed as a transfer course in other parts of the system and will appear in some form on the transcript.

	Item	Description
10	TCN#	Display only. Defaults in from the transcript sequence number in the previous block.
11	Level	Display only. Defaults in from the level (Apply to Level) indicated in the Transfer Attendance Period block.
12	Term	Display only. Defaults in from the term (Effective Term) indicated in the Transfer Attendance Period block.
13	Count (Required)	<p>The Count in GPA indicator should always be checked. It specifies whether the transfer course will be used in degree evaluation. It also specifies if the course will be calculated in credits that a student will be granted and if the course and its information will displayed on student transcripts.</p> <div style="border: 1px solid black; padding: 5px; width: fit-content; margin-left: 20px;"> <p><i>Note</i></p> </div> <p>When modifying transfer course records based on the appearance of the transcript, first ensure that Count is checked and then review changes in the transcript before further modifications are attempted.</p>
14	Subject (Required)	<p>The subject of the McGill equivalent of the transfer course.</p> <p>Must be a valid subject in the subject table, such as ENGL. If no McGill equivalent subject exists or if entering a block of credits, enter TRNS.</p>



	Item	Description
15	Course (Required)	<p>Describes McGill equivalent course.</p> <p>If a McGill subject and course number is equivalent to the transfer course taken at the other institution, enter the McGill course number, such as BIOL 111.</p> <p>If there is no equivalent McGill course subject (such as BIOL) but there is no exact McGill course equivalent to the course taken elsewhere as the course number, enter the subject and the level if it can be specified, such as BIOL XXX, BIOL 2XX or BIOL 4XX.</p> <p>TRNS XXX — If there is no McGill equivalent subject or if you are recording a block of credits, use TRNS XXX</p>
16	Hours (Required)	<p>The number of credits that the student will be granted on the McGill record.</p> <p>Defaults to the Course field, but the value can be modified. Therefore, always check to ensure that the number of credits that you intend to grant have been generated by the system and adjust the credits as needed.</p> <p>Will be displayed on transcript. (In some cases only the total credits granted for the institution will be displayed on the transcript.)</p>
17	Grade (Required)	<p>A transfer grade.</p> <p>None of the grades used for transfer courses cause a change in GPA. They only affect the total credits granted to a student. These grades do not appear on transcripts.</p> <p>TR — Credits granted to a student's McGill record for the course which is being entered on the system.</p> <p>EX — Credits not granted, but student is exempted from the McGill equivalent course. The degree audit system (CAPP) will not be able to use any course that has been entered with EX grade. The EX grade should be used only in specialized circumstances. It should not be used as replacement for the legacy 'Exemptions without Credits'.</p> <p>XTR — Transfer courses excluded from credit count at the time of faculty transfer.</p> <p>XEX — Exemption from McGill equivalent course excluded at the time of faculty transfer.</p>
18	Mode (Required)	<p>The grade mode.</p> <p>Enter T.</p>
19	Repeat	<p>Not currently used at McGill.</p>



	Item	Description
20	Repeat System	Not currently used at McGill.
21	Title (Required)	<p>The title for the McGill course. If an exact McGill equivalent course has been entered, this field will be system-generated.</p> <p>Otherwise enter T.</p> <p>The title of the McGill equivalent course or any data entered in this field will not appear on the transcript.</p>

Equivalent Course Attributes field descriptions

	Item	Description
22	Attribute	<p>A 4-character code for course attribute used in the degree audit system (CAPP).</p> <p>Attributes added to a particular transfer course in the Degree Program Attribute Validation table automatically generate for you, such as ARAM or RMCH. These appear in the case of McGill Degree Evaluation courses.</p> <p>Otherwise enter the appropriate attribute manually.</p>
23	Attribute Description	A description of the attribute code. Imported from the Degree Program Attribute Validation table.

The SHATRNS form



Attendance Period GPA field descriptions

The final window in SHATRNS is a single block of view-only information used to review the impact of transfer work information you have entered.

Attendance Period	Term	Level	Attempted Hours	Passed Hours	Earned Hours	GPA Hours
1	200509	UG	.000	.000	.000	.000
			Quality Points	GPA		
			.00	.00		

Item	Description
Attendance Period	Attendance Period Number
Term	Term of the Attendance Period
Level	Level of the Attendance Period
Attempted Hours	Value 0.000
Passed Hours	Value will be the same as the value for Earned Hours
Earned Hours	Indicates the credits that have been awarded in the Equivalent Course Detail Block
GPA Hours	Value will be 0.000
Quality Points	Value will be 0.000
GPA	Value will be 0.000



Troubleshooting

The following list of error messages can assist you when troubleshooting problems entering data and navigating in the SHATRNS form.

Message	Probable Cause	Solution
ERROR Can't copy over field that is protected from update	Attempt to change Effective Term or Apply to Level for an existing record.	Create a new record with new Effective Term or Apply to Level information, or remove associated record in Transfer Course Detail window to allow the modification of Transfer Attendance Period block information.
FRM-40200: Field is protected against update	Attempt to change the value in the Sequence No field.	The system assigns a transcript sequence number automatically (if you have not entered 000). Ignore the Sequence No or refer to "How to remove information" on page 10 to delete this entire block of information.
ERROR All fields are required except for Count	Attempt to save a record from the Equivalent Course Detail block without a Title entered in the field, which remains out of view until you scroll.	Any empty field in this block will create the error, so also make sure that Subject, Course, Hours, Grade, and Mode are entered as well as the often hidden Title field.
ERROR Invalid grade/ mode combination entered.	Attempt to enter a value in Grade and Mode that do not correspond to the grade value already entered in the adjacent field.	Ensure that grade value corresponds with the Grade and Mode .
ERROR Grade mode invalid for grade entered.	Attempt to save a record without values in Grade and Mode .	Enter Grade and Mode values.
FRM-40209: Must be in range 0 to 9999.999	Attempt to enter Hour values that do not conform to range standards.	Enter a value more than 0 but less than 1000 in the Hours field.
FRM-40508: ORACLE error: unable to INSERT record.	Attempt to delete values from Equivalent Course Attributes and then save. You should select Record > Clear from the Menu bar.	You probably are trying to delete values from Equivalent Course Attributes and then save. You should select Record > Clear from the Menu bar.

Troubleshooting



Message	Probable Cause	Solution
NOTE: Transfer Course detail exists. Institution code, effective term and level cannot be updated without deleting course detail 1st.	A general warning as you Next Block out of Transfer Institution when a record exists. However, it could also be an attempt to delete Transfer Course Form information once a record exists in Transfer Course Detail.	Note the former. If the latter: Remove the record before changing Transfer Attendance Period block information.
FRM-40510: ORACLE error: unable to DELETE record.	Attempt to delete a record.	Remove saved values systemically by deleting recorded information across each block from last added to first added (as described in "How to remove information" on page 10).