

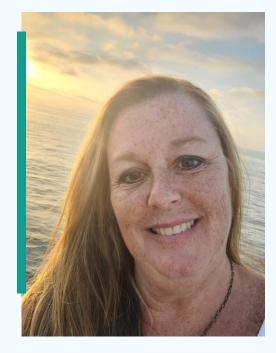
# Transferology

# Tips and Tricks for New and Experienced Users

**Product Overview** 



#### 



# **Your Host**

# Aleta Carlberg

Transfer Solutions Specialist CollegeSource, Inc. aleta@collegesource.com

#### **Product Overview**

Transferology

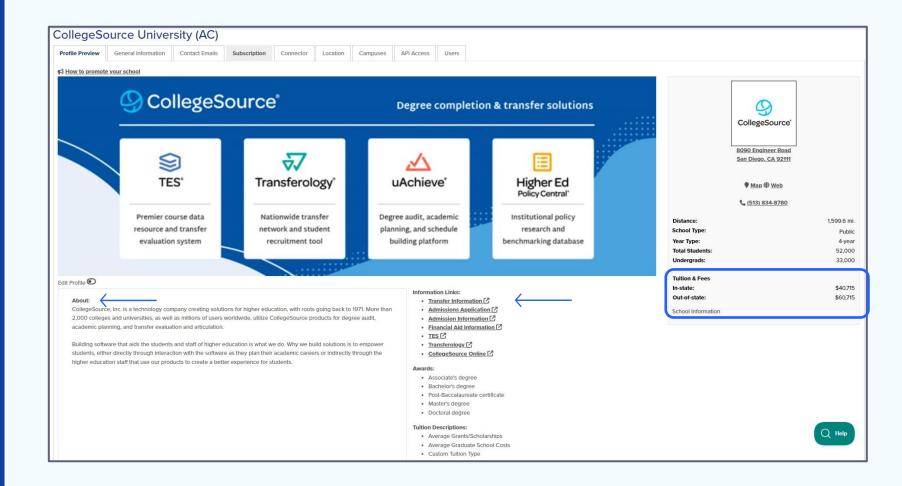
# Transferology Lab

- **School Profile** 01
- **Contact Emails and Users** 02
- 03 Programs/Majors
- Pathways 04
- Popular Courses/Unknown Equivalencies 05
- **Statistical Reports** 06
- **Promote Your School** 07
  - Referral Links/Badges
  - Custom Landing Pages

#### SCHOOL PROFILE

# Managing Content

- About Information
- Information Links
- Changing Logos or Tuition and Fee Amounts
  - Send Me Via Email



Transferology Lab

#### CONTACT EMAILS

- Primary Contact and Lab Account Request must be a staff member with the school administrator role
- Can have more than one email address for a specific contact
- Information Request can be a generic email

ollegeS	ource Unive	rsity (SJ)					
Profile Preview	General Information	Contact Emails	Subscription	Connector	Location	Campuses	Users
Primary Con	ntact Email*						
					+	Add	
shelly@collegesou	urce.com ×						
Planning Gu	ide Contact Email*						
					+	Add	
shelly@collegesou	urce.com ×						
Information	Request Email*						
	Request Linan				+	Add	
shelly@collegesou	Irce.com ×						
Quarterly St	atistic Report Email*						
					+	Add	
Lab Account	t Request Email*						
					+	Add	
shelly@collegesou	urce.com ×						



- No limit on the amount of Lab accounts
- Find role specific information under See Role Permissions link
- Inactivate accounts that should no longer be active

Profile Preview	General Information	Contact Emails	Subscription	Connector	Location	Campuses	Users							
See Role Permission	ns 🧲 🚽											+ Create User		Export
Search By Name or I	Email										Showing All Roles	~	🗹 Ac	tive users o
Name	Email			Status	Roles			Code	Link	Logins	Last Login	٥	Edit	Remove
Advisor A	adv@xxxc	collegesource.com		Active	Advisor					5	Jun 22, 2021 5:06:49 F	PM	Ľ	Ū
Recruiter R.	rec@xxxc	ollegesource.com		Active	Recruiter					2	Oct 2, 2017 6:18:27 AM	I	Ľ	⑪
School Admin	schla@xxx	xcollegesource.com		Active	School Adn	inistrator				1	Mar 14, 2017 7:47:40 A	М	Ľ	⑪
Shelly Jackson	shelly@cc	ollegesource.com		Active	Transfer Sp School Adn Program Ac Advisor Recruiter TES Evalua Transfer Pa Super	ninistrator Iministrator				6,758	Nov 21, 2022 2:52:35	PM	ľ	
Shelly - 2 Jackson -	2 <u>shelly2@c</u>	collegesource.com		Active	Transfer Sp School Adn Advisor Recruiter TES Evalua	inistrator				2	Apr 27, 2020 1:50:25 P	'n	Ľ	Û
Super User	shelly.jac	kson@collegesource	.com	Active						17	Aug 9, 2019 2:39:17 PM	1	Ľ	Û
Transfer Specialist	ts@xxxco	llegesource.com		Active	Transfer Sp	ecialist				1	May 11, 2016 1:28:25 PI	M	Ľ	⑪



#### FILE FORMAT

# Program Setup

– Manage Programs

- Click on View File Format link
- School Administrator Or Program Administrator Role

# Manage Programs

View File Format 🜌

# Transferology Programs Import Record Format

Programs can be imported into, or exported out, of Transferology Lab by users with either the School Administrator or Program Administrator role. The format for both imported and exported data is the same, as follows:

Field	Format	Length	Pattern	Description	Required?
Name	Variable Char	1- <b>1</b> 50		Your program name	Required
Status	Character	1	T=Test V=Visible P=Program	Test = Only visible to Administrators at your school	Required
			Only	Visible = Visible to all Transferology users Program Only = Program will be shown in list of programs for your school. Users will be able to view program details (name, description, URL, etc), but will <b>not</b> be able to run audits with the program.	



#### IMPORTING FILE

Import Programs		×
File to import *	Choose File No file chosen	
Delimiter *	<ul> <li>Comma</li> <li>Tab</li> <li>Pipe</li> </ul>	
Other Settings	Delete existing programs?	
	Cancel	ort

Transferology Lab

#### UPDATING FLAG

School Profile – School Management – General Information Tab

This flag must be updated to have programs display to students in Transferology

School Administrator Role can make this update

CollegeSo	ource Unive	rsity (SJ)							
Profile Preview	General Information	Contact Emails	Subscription	Connector Location	Campuses Users				
CollegeSource Un Details	iversity (SJ)								* = required
Website*		www.collegesource.cor	n				Referral code	collegesource-sj	
Course equivale	encles*	Enabled	~	Subscription level*	Full	~	Display Flag*	Visible	~
Equivs public		Disabled	~	Programs enabled	Enabled	~	Memo alignment*	Right	~
Auto archive lea	nds & advisees*	No	~	Online Only					



#### MANAGING PROGRAMS

⊘ Edit⊘ Delete

✓ Add One Program

Manage Programs							
49 Programs Found				_	,	/iew File F	Format
Filter by program Name, Code, or Degree Type					- Create Program III Exp	ort 🔰	🕻 Import
Name	Code	Status	Terms Offered	Degree Type	Program Offered	<b>A</b>	۵
Anthropology (BA)	ANTH-BA	Visible	Since September 1975	Bachelor's	On Campus	(J <sup>1</sup>	Û
Art (BA)	ARTI-BA	Visible	All	Bachelor's	On Campus	(J <sup>1</sup>	⑪
Art (BFA)	ARTM-BFA	Visible	Since September 1946	Bachelor's	On Campus	(J <sup>1</sup>	Ŵ
Behavioral and Cognitive Neuroscience (BS)	NERO-BCNZ-BS	Visible	All	Bachelor's	On Campus	64 <sup>1</sup>	⑪

#### VIEW PROGRAMS

In Lab

Advising & Recruiting — Programs

All staff may view

Programs My Program Requests				
School Name				
CollegeSource University (SJ				
Program				
Filter Programs by Name	All Program Types	~		
We have program data for this school, but running a program is not enabled.				
Program Name			Degree Type	Program Informat
Anthropology (BA)			Bachelor's Degree	Program Informat
Art (BA)			Bachelor's Degree	Program Informat
Art (BFA)			Bachelor's Degree	<u>Program</u> Informat
Behavioral and Cognitive Neuroscience (BS)			Bachelor's Degree	<u>Program</u> Informat

nthropology (BA)	
The Department of Anthropology houses a diverse faculty that includes cultural anthropologists, archaeologists, biological anthropologists, and geographers whose scholarship spans the breadth of human experience. The discipline of anthropology is concerned with the human condition as well as the structure of the social, environmental, political and economic contexts within which humans operate.	Information Link: • <u>Program Information</u> 🛛 🗲

#### FEATURES

# Programs & Majors

#### View List

#### View Details – Brief Description and Link

Eastern Illinois University *		
About Programs		Pathways To
Enter Program Name	All Program Types	~
**General Education**		Other
Accounting (BSB)		Bachelor's Degree
Art: Art History Option (BA)		Bachelor's Degree
Art: Education Teacher Licensure Option (BFA)		Bachelor's Degree
Art: Graphic Design Option (BA)		Bachelor's Degree
Art: Graphic Design Option (BFA)		Bachelor's Degree

#### Accounting (BSB)

Accounting is the art and practice of measuring, interpreting, and communicating information about financial activity. The skill set that students acquire in the study of accounting at Eastern Illinois University is both powerful and flexible, providing students with a wide variety of employment options upon graduation. Most commonly, graduates of EIU's Accountancy Program assume positions at public accounting firms or as "private sector" accountants.

#### Information Links:

- Program Information
- <u>Transfer Information</u>

Awards: Bachelor's Degree



#### FEATURES

**Transfer Pathways** 

Partnerships with schools and static program information

92%	Southern Illinois University Edwardsville 📩	S Pathways
ラ <b>と</b> % Match	Edwardsville, IL (72 miles away)	
Materi	4 year, Public - <u>Vlew Full Profile</u>	<b>666</b> 66

Southern Illinois University Edwardsville *	
23 Matches 2 Maybe	1 Pathways
This transfer pathway displays equivalencies between two schools that lead to at least one degree and is intended for use in planning your education. The providing school(s) have done the accuracy of the pathway, however students are strongly encouraged to speak with advisors at each school before enrolling in courses.	ir best to ensure the
Select a partner school Lincoln Land Community College	
Pathways from Lincoln Land Community College to Southern Illinois University Edwardsville	Pathway
Lincoln Land CC - SIUE Pathway Programs	5
SIUE Course Equivalency Guide	ଭ
Pathways Table	



#### FEATURES

# **Transfer Pathways**

PDF document, URL, or TES Group Project

		-	ARDSVILLE		
	Pa and Clark Community Colle ate of Applied Science Degr	ge ,		stice rn Illinois University Edwards Bachelor of Science Degree	ville
	Fall Year 1		0.0	Fall Year 3	
LCCC Course		Hours	SIUE Course		Hour
ENGL 131	First Year English I	3	CJ 302	Research Methods	
CRMJ 131	Intro to American Criminal Justice	3	CJ 366	Race and Class in CJ	
CRMJ 148	Criminal Law	3	CJ 208	Intro to Law Enforcement	
POLS 131 or 132	American Gov't or State & Local Gov't	з	BPS/BLS/EL	Breadth Physical/Life Science with Lab	1
CRMJ 133	Crime Prevent & Patrol Techniques	з	вним	Humanities Breadth	
Total		15	Total		1
	Spring Year 1			Spring Year 3	
LCCC Course		Hours	SIUE Course		Hour
SOCI 131 <sup>2</sup>	Introduction to Sociology	3	CJ 303/SOC 303	Data Analysis in CJ/Stats with Comp.	1
CRMJ 141	Criminology	3	CI XXX	CJ Elective	
CRMJ 249	Criminal Court Procedures	3	CJ XXX	CJ Elective	
CRMJ 252	Constitutional Law	3	EH	Health Experience	
SPCH 145	Public & Private Communication	3	BFPA	Fine and Performing Arts Breadth	
Total		15	Total		1
LCCC Course	Fall Year 2	Hours	SIUE Course	Fall Year 4	Hour
CRMJ 151	Intro to Corrections	- HOUIS 3	CI XXX	Elective	nour
CRMJ ELE <sup>1</sup>	Criminal Justice Elective	3	CLXXX	Election	
CRMJ ELE <sup>1</sup>	Criminal Justice Elective	3	BICS	Breadth Information & Comm. Soc.	
	Internship or CRMJ Elective	3	ELE XXX	Elective	
Math 137 <sup>2</sup> or 138	그는 것 같은 것은 것 같은 것 같이 많은 것 같은 것이 같이 다.	3	ELE XXX	Elective	
ENGL 1322	First Year English II	3	Total	LILLIVE	1
Total	rust tear trigitan n	18	- Color		-
	Spring Year 2			Spring Year 4	
LCCC Course	5p	Hours	SIUE Course		Hour
CRMJ 254	The Juvenile Offender	3	CJ 488	Supervised Internship	
CRMJ ELE <sup>1</sup>	Criminal Justice Elective	3	15	Interdisciplinary Studies	
CRMJ ELE <sup>1</sup>	Criminal Justice Elective	3	EREG	EXP- Global Culture Race & Equity	
PHIL 231	Fundamentals of Logic	3	ELE XXX	Elective	
IAI LS/PS/EL	IAI Life or Physical Science w/lab	4	ELE XXX	Elective	
Total		16	Total	0.0868.0868	1
			Bachelor of	Science Total	125
Associate of	Applied Science Total	64	only be counted	atisfies both the ERGU and EREG requirement as one and not both.	
<sup>3</sup> Criminal Justi	ce electives, CIS 135, CRMJ 160, CRMJ 256	5, CRMJ 260,C		mplete at least 50% of the degree requirem	ents at SIUE



#### TRANSFER PATHWAYS

# Viewing Pathways In the Lab

# All Staff

Advising & Recruiting and Program Pathways

Type in the name of school and select the school

Program Pathways Transferring To		
Western Illinois University		
Select a partner school		
Black Hawk College	~	
Pathways		Pathw



#### TRANSFER PATHWAYS

- Pathways expire one year from the date added
- If partner school is part of Transferology network – will receive an email that pathway was added. Can make visible for their school.
- Two weeks before expiration, email sent for notification of expiration. If not approved for another year, email sent the day of expiration. (To creator school and partner school if valid.)
- Edit
- Delete

Pathways To My School	Pathways From My School				
Filter				]	Approve - Refresh From TE
Pathway	Name	Partner	Me	Expires	Actions
ଭ	Art Teacher Education	-		12-11-2024	C ā
ଭ	Honors Program	-	•	02-01-2025	C D
151	Graphic Communications	-		12-11-2024	C D
(G)	Studio Art	-		12-11-2024	C to
ß	Elementary Education	-		12-11-2024	2 1
ß	Early Childhood Education	-		02-01-2025	C D
G	Agriculture			12-11-2024	2 1
ß	RN to BSN			12-11-2024	2 1
(G)	Graphic Design	-		12-11-2024	2 1
6	Redbird Promise	-		12-11-2024	C ŵ



#### IN THE LAB

# Reports

- Popular Courses
- Unknown Equivalencies

Filter by a specif	ic school name or course				T Apply
« First Previous Showing 1 - 100					
Course	School	State	Distance	Count	Active Rule
AP07	AP- Advanced Placement	Standardized Exam		223	Yes
AP36	AP- Advanced Placement	Standardized Exam		<u>217</u>	Yes
ENGLI1101	College Of Dupage	IL	259 miles	<u>169</u>	No
AP85	AP- Advanced Placement	Standardized Exam		<u>159</u>	Yes
AP37	AP- Advanced Placement	Standardized Exam		<u>143</u>	Yes
AP66	AP- Advanced Placement	Standardized Exam		<u>140</u>	Yes
AP57	AP- Advanced Placement	Standardized Exam		<u>139</u>	Yes
ENGLI1102	College Of Dupage	IL	259 miles	<u>136</u>	No
ENGL1100	Columbus State Community College	ОН	92 miles	135	Yes

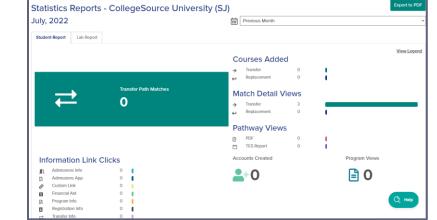
Filter by school name			Filter by department		T Apply			
Clear filters								
≪ First < Previous			Showing 1 - 72				Next	
Course	School			State	Distance	Count	Status	
EMS121	Pikes Peak Community College			CO	1089 miles	2	Mark Reviewed	
SPCH1144	Central Texas College			XI.	939 miles	1	Mark Reviewed	
SOCO101	San Diego City College			CA	1871 miles	1	Mark Reviewed	
SOCI1301	Central Texas College			XI.	939 miles	1	Mark Reviewed	
SOCI1010	Northeast Community College			NE	703 miles	1	Mark Reviewed	
SOC101	Pikes Peak Community College			<u>.co</u>	1089 miles	1	Mark Reviewed	
SCI204	DeVry University-Illinois			IL.	249 miles	1	Mark Reviewed	

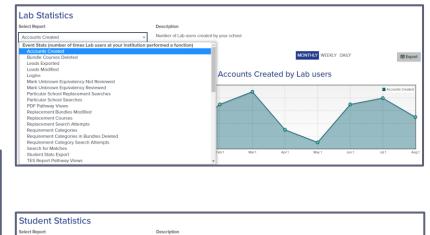


#### IN THE LAB

## **More Reports**

#### Student and User Statistics





Number of students referred by your school who created accounts in Transferology

Accounts Created

Home Page Logo Clicks Information Requests Logins

PDF Pathway Views

Student Referrals

Transfer Courses

Replacement Courses Replacement Search Attempts

Requirement Categories Requirement Category Search Attempts

TES Report Pathway Views

Transcript Import Requests

Replacement Match Details Program Info Views Requirement Category Match Details

Event Stats (number of times students performed a fun

Page View Stats (number of times students viewed a particular area)

Particular School Replacement Searches Particular School Searches



MONTHLY WEEKLY DAILY

its Created by students

Export

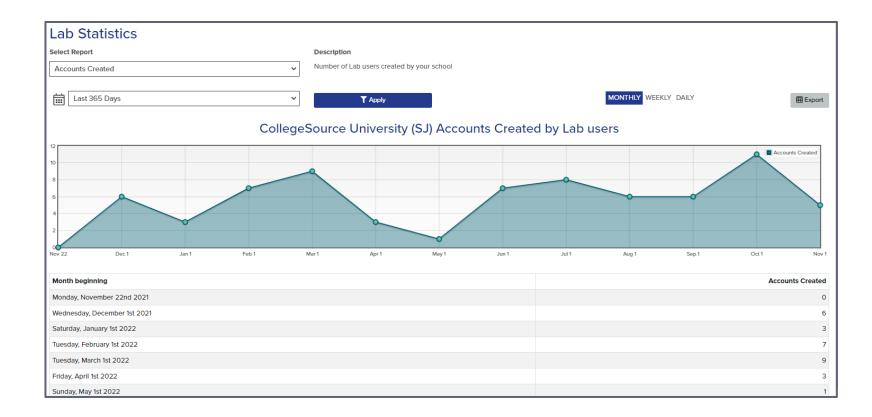
Ao

#### STATISTICS REPORTS

**School Profile -**View Student Statistics

# **View Lab Statistics**

Run on demand reports based on criteria





#### QUARTERLY REPORT

# **Student Report**

# Label Report

Emailed to designated staff. All staff can view the report in the Lab.

Stati	stics Reports - Co	lleges	Source University (SJ)						Export to PDF
October, 2022			Previous Month					•	
Studen	nt Report Lab Report								
									View Legend
				Co	urses Added				
				÷	Transfer	0			
				<b>ب</b>	Replacement	0			
	$\rightarrow$	Tra	nsfer Path Matches		atch Detail Vie	ws º			
		Ŭ		<i>→</i>	Transfer Replacement	0			
				4	Replacement	0			
				Pa	thway Views				
				ß	PDF	0			
					TES Report	0			
Inf	ormation Link Clicks	;		Acc	ounts Created			Program Views	
.n	Admissions Info	0							
1	Admissions App	0	1	ĕ	+0				
S	Custom Link	0	1 C C C C C C C C C C C C C C C C C C C						
\$	Financial Aid	0	- E						
2	Program Info	0	1 C						
8	Registration Info	0	1						
⇒	Transfer Info	0	- E						



#### MARKETING

## Add Link to Website

#### Promote, Promote, Promote!

#### CollegeSource University (SJ) Branding and Marketing

#### Thanks for your Interest In Transferology!

We have a few guidelines designed to help you use our brand assets and resources. Please take a few moments to read through them. For questions regarding usage not covered by these guidelines, please email the Marketing Department at alanna@collegesource.com and include a visual mockup of intended use.

Promote Your School Logo Assets Guidelines

#### Promote Your School

We recommend using the Student Referral Link or Badges to promote your school to students using Transferology. By default, when a student visits transferology.com, school matches are displayed from highest to lowest match percentage. To ensure your school is always at the top of the school matches, always use the Student Referral Link or Badge when you direct students to Transferology.

#### Student Referral Link

When students click your referral link they will see your institution at the top of the school matches, regardless of the match percentage. To direct students to your transfer matches, we suggest using this link when hyperlinking text or running ads.

<a href="https://www.transferology.com/school/collegesource-sj" title="Transferology makes exploring college transfer easy">YOUR TEXT GOES HERE!</a>

#### Here are a few examples

- On website page, "Login to Transferology to see how your courses will transfer, and contact us with any questions."
- In email signature, "See how your courses transfer to CollegeSource University (SJ)"
- When purchasing a Facebook or Google ad, use your Student Referral Link to increase site traffic

#### Student Referral Badge

The referral badge is another alternative, it combines an image with the referral link. When students click the referral badge, they will see your institution at the top of their match results, regardless of the percentage. We suggest using the Student Referral Link above or these Student Referral Badges, to direct students to your transfer matches during their searches.

Select a size using the radio buttons, then copy/paste the code. Give this code to someone who has permission to place it on your website page where students are looking for transfer information.



<a href="https://www.transferology.com/school/collegesource-sj" target="\_blank" title="Visit transferology.com"><img
src="https://www.transferology.com/images/branding/Transferology\_1\_8\_0\_\_1\_5\_0.jpg" title="Visit transferology.com" width="180"
height="150" att="Student student stu

Copy the text above



#### MARKETING

# Create a custom landing page

Students who click your referral link will view this page when they visit Transferology.

CollegeSource University (AC) Branding and Marketing Thanks for your interest in Transferology! We have a few guidelines designed to help you use our brand assets and resourcuse.	ces, Please take a few moments to read through th	rem. For questions regarding usage not covered by these guidelines, please email the Marketing Department at marketing i	collegesource.com and include a visual mockup of intended
Promote Your School         Logo Assets         Guidelines           Institution Template Editor         Customize your own instition landing page. Students who click your referral line           Working on the landing page for: CollegeSource University (AC)	k will view this page when they visit Transferology.	Make sure to view alterations in the preview window before submitting any final changes.	i≡ Institution Template
Preview Changes     Save Changes       Color Selection       Primary Color:	Publish Landing Page Result: Sample Text Preview	The <b>Primary Color</b> must be accessible (WCAG AA) for use with the color white (#FFFFF). It is used for: • Header text on white background • Background color of sections with white header/body text.	
Secondary Color: \$ 0090b0 \$ Accessibility Check: WCAS AA • Contrast Ratio:	Result: Button Preview	The <b>Secondary Color</b> must be accessible (WCAG AA) for use with the color white (#FFFFF). It is used for: • Main buttons ("Sign up" and "Get started") • Various icons used throughout the page	
Tertiary Color:         Image: Color of the state of	Result: Border Preview	The <b>Tertiary Color</b> must be accessible (WCAG AA) for use with the color white (#FFFFF). It is used for: • Border color of infographics.	



#### CO-BRANDED LANDING PAGE

About Log in Sig



See how your courses, exams, and military experiences transfer to Penn State.

Create a free account to view personalized results instantly.

#### Get started

Have an account? Log in.

#### Penn State and Transferology

PennState 🕂 😽 Transferology

The Pennsylvania State University has officially partnered with Transferology to show students how the institution will award credits for transferable courses, military learning experiences, and standardized exams including AP, CLEP, IB, and more.

#### Get personalized transfer results in 3 easy steps!

1

#### Create a free Transferology account

Sign up quickly with an email address, or



#### Add courses

Add the college courses, exams, and military learning experiences you have taken (or plan



#### View results

See how your coursework will be accepted at the institution, with options to get more

#### Co-branding adds another layer of trust and informs students of the partnership.

The Transferology portal for Penn State offers the ability to customize various areas of the landing page to clearly display imagery and information to users.

#### How to access

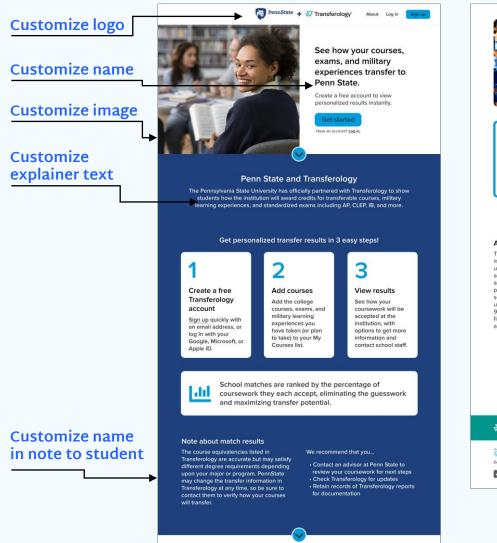
The landing page can be accessed through a unique Referral URL which can be promoted within webpages and emails as a text hyperlink or clickable banner graphic (right).

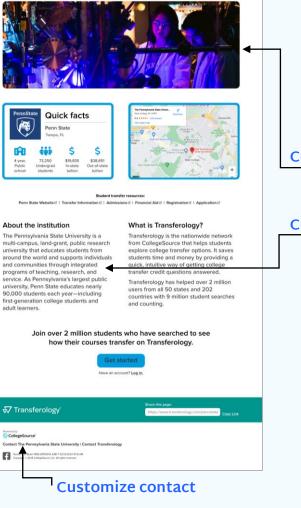


Using the URL, **transferology.com/pennstate** (or similar, for example), will ensure anyone clicking that link will only see USF in their school match results, even if students use an existing Transferology account.

## 😽 Transferology®

#### LANDING PAGE: CUSTOM ELEMENTS





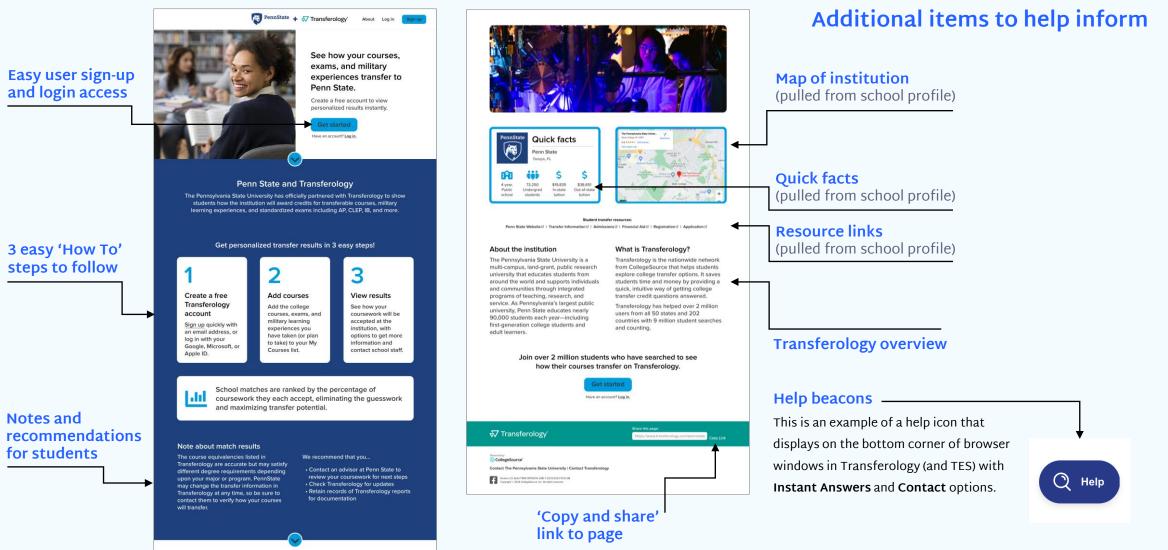
Staff will have the ability to customize these elements in the institution landing page.

#### Customize image

**Customize About text** 



#### LANDING PAGE: HELPFUL ELEMENTS



**Transferology**<sup>®</sup>



# Questions?

For more info on Transferology and other products, please visit collegesource.com or email us at info@collegesource.com

Visit our Support Center at support.collegesource.com/transferology



#### Get in touch!

Aleta Carlberg Transfer Solutions Specialist CollegeSource, Inc.

✓ aleta@collegesource.com