

Transferology FAQ

Q: Who do I contact if I'm having problems with logging into the Transferology Lab site?

A: Contact John Panzica - johnp@collegesource.com

Q: Who should I contact with questions or concerns after I begin using the site?

A: Send a Help Desk ticket to: <http://dars.custhelp.com/>

Q: What is the difference between Transferology and Transferology Lab?

A: Transferology (www.transferology.com) is the student site which leads the student through the process of entering or importing their courses, finding schools who will accept that coursework in transfer and finding how the coursework will apply to a degree program at a participating school. Students may also request advising and request more information from a participating school.

Transferology Lab (www.transferologylab.com) is the site used by college/university Advisors, Administrators, Recruiters and Equivalency Managers. Course equivalency tables are available on this site as well as many different options to improve transfer equivalencies, manage programs, create course bundles, advise students and recruit students.

Q: Must I create an account to use Transferology and Transferology Lab?

A: Yes, all users must create an account to sign in each time on either site. Email address is used for sign on id. New Transferology Lab users must have their security roles assigned by a Transferology Administrator at their college or university.

Q: How can I access the Advisor Training videos and documentation?

A: Advisor training videos and documentation are now available to assist college and university advisors in learning how to use Transferology Lab.

There are videos that cover the five areas most commonly used by Advisors within the Transferology Lab:

- My Stuff (account information)

- Managing Course Bundles
- Advising Students
- Viewing Programs
- Searching Equivalencies (video not yet available)

Locate the videos on the DARS project website at:

<http://www.dars.mntransfer.org/updates/transferology/index.html>

To access the documentation in addition to the videos, go to the CollegeSource documentation at:

<https://clients.collegesource.com/home/display/TFO/Transferology+User+Guide+for+Advisors>

Q: Will my current u.select Advisor account be moved to Transferology Lab?

A: Yes, if you created your account prior to February 1, 2014, an account will be created for you by CollegeSource for the Transferology Lab beta and those accounts will be moved to the production website for the March 31st launch. These advisors' accounts will be created by March 19, at which point they will have access to the Transferology Lab beta site.

Q: What if I'm an Advisor, but didn't have an Advisor account in u.select?

A: Transferology "Administrators" will be able to create new advisor accounts after March 17 on the Transferology User Management System. Once the account is created, Advisors can access the Transferology Lab site.

Q: As a Transferology "Administrator" what do I need to know about creating Advisor accounts?

A: Accounts are now linked to TES, so current TES account holders will use the same username for Transferology Lab. A new manage users area will be available to administrators for creating new accounts. We are not sure about how the Transferology administrators will get notified when an advisor wants to create an account with Advisor level security. Since all users must create an account to use Transferology and Transferology Lab, it may be more manageable to plan to proactively create advisor accounts, instead of having to react when an advisor decides they need an account.

Q: What information do I need in order to create an account for an advisor, equivalency manager, recruiter or another administrator?

A: To create each new account, you will need to enter:

- a. Name
- b. Title
- c. Email address

- d. Phone number
- e. School name/address entry defaults based on login account
- f. Transferology Role to be assigned
- g. Check the “Active” box

Q: What happens once the administrator creates the Transferology Lab account?

A: The person for whom the account is created will get an automatically generated email with login instructions.

Q: Will there be promotional items for Transferology?

A: BOOKMARKS – Bookmarks have been created with the new web address and some basic information about Transferology and each college and university has been sent a supply.

REFERRAL BADGE – If you saw the Transferology March 10 webinar, they talked about Referral Badges. This referral badge is a managed ‘link’ that you will use on your college/university website where you currently promote u.select and will begin to promote Transferology on March 31, 2014. By using this referral badge, when a student accesses Transferology via your website, any course equivalency match results that student gets will feature your school as the top school on the list, even when the match percentage is lower.

You may wish to get this on your webmaster’s job queue at this point as it can’t be actually put on your website until March 31. We will share more of the ‘how to’ as we know more.

PROMOTIONAL VIDEO - There’s a link to a Transferology promotional video also on our project website <http://www.dars.mntransfer.org/updates/transferology/index.html>

Q: What happened to the old u.select site?

A: The current website remained in effect until March 31, 2014. As of March 17, a link to the Transferology promotional video appeared on u.select to begin to introduce the move to Transferology.

Users going to the old site, www.transfer.org will be automatically redirected to the new site www.transferology.com beginning March 31, 2014.

Q: How do I learn more about CollegeSource webinars about Transferology and Transferology Lab?

A: If you currently have a support center account, go to the CollegeSource Support Center at: <https://clients.collegesource.com/home/display/SVC/Webinars>

If you don’t have a support center account, create a CollegeSource account at: <http://clients.collegesource.com/myprofile/RequestAccountServlet>

If you have a problem viewing the webinar, click on the link
<https://www4.gotomeeting.com/codec?Portal=www.gotomeeting.com>

Revised: 3/15/2017