Articulation and Transfer Clearinghouse Update

December 5, 2006

Agenda

- What is the Articulation and Transfer Clearinghouse?
- How will it work?
- How will we implement it?

What is the Articulation and Transfer Clearinghouse (ATC)?

- The ATC establishes a statewide transfer support mechanism to
  - Securely move electronic transcripts between the state-supported institutions using nationally accepted standards
  - Consistently apply the state-wide Articulation and Transfer course equivalencies established through TAGs, OANs, and review processes
  - Flexibly respond to changes in policies, curriculum, and technology

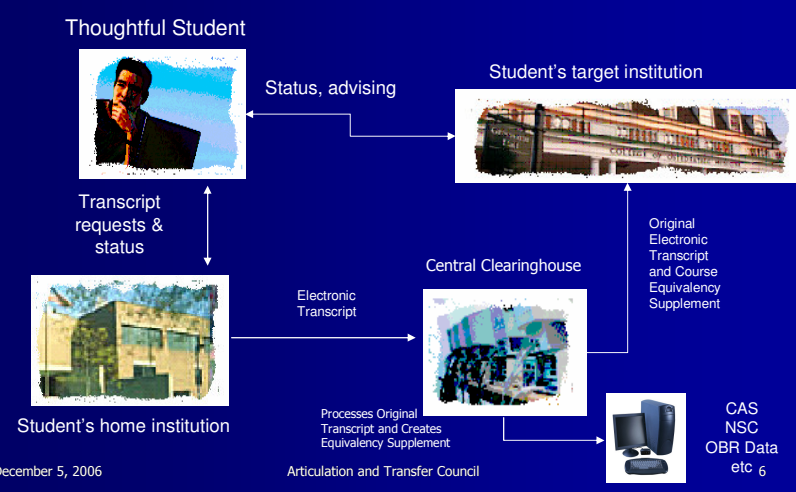
Why do I need the ATC?

- Facilitate routing of electronic transcripts in nationally accepted, standard format
  - PESC XML with Ohio implementation details
- Off-load institutional complexity in application of course equivalency rules
- Consistently and comprehensively apply the rules based on latest faculty panel decisions

Delivery of functionality

- Production – *Pilot appx. 3/1/07, production appx. 4/1/07*
  - Web page to send transcript
  - Web service to send transcript
  - Web page to receive transcript
  - Web service to receive transcript
  - User interface
  - Full security model
  - Electronic communication – email
  - Central ATC provides transcript and an empty course equivalency supplement
- Acknowledgement to source institution that transcript was received and processed by destination
- Course equivalency in supplement – *Pilot appx. 7/1/07, production appx. 8/1/07*
- Ohio Transfer Module in supplement
- Further enhancements…

Target Credit Transfer Process



What you won't see today

- Final implementation of the security model
  - Working with Gartner, Agile, and Haverstick consultants to create the model
  - First production delivery
- Course equivalency mapping
  - "Hard-coded" for now
  - Will be in delivery of functionality Summer 2007
  - Starting detailed requirements work December, 2006
- New Regents web site look and feel
  - Will be in first production delivery

Demonstration Scenario

- Gabriella Settle (not a real student) has requested her transcript be sent from Lorain County Community College to the University of Cincinnati via Lorain's web site
- Request has been received in Lorain's Records Office.

Business Processes

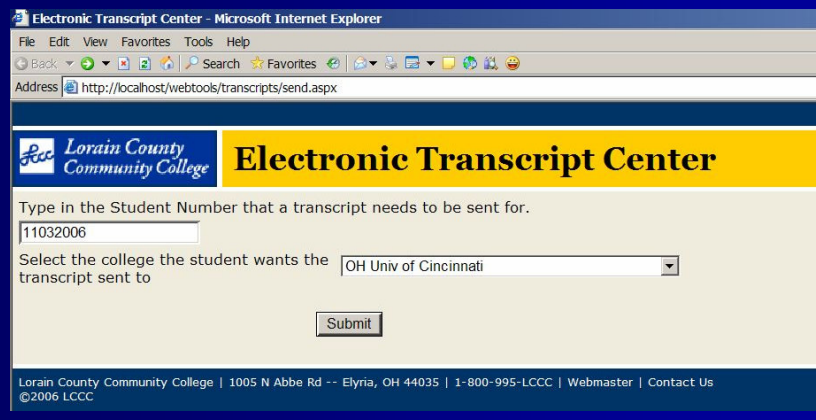
- At Lorain
  - Records office will
    - clear student's accounts
    - initiate an electronic process to extract student data from Lorain's Jenzabar TE Student Information System, format the transcript in the agreed upon standard, and deliver it to the Central Clearinghouse via a web service call
- At Cincinnati
  - Registrar's Office will periodically log onto the Central Clearinghouse to see if any transcripts are available to view or download via a web page interface.

Demonstration

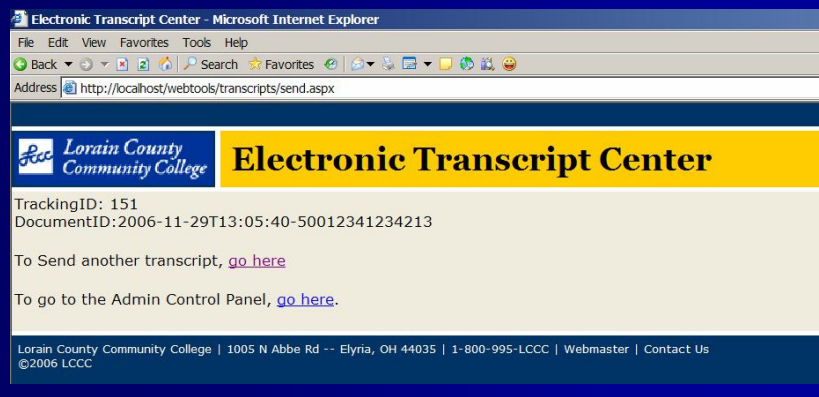
At Lorain: Trey Mitchell

From Cincinnati: Doug Burgess

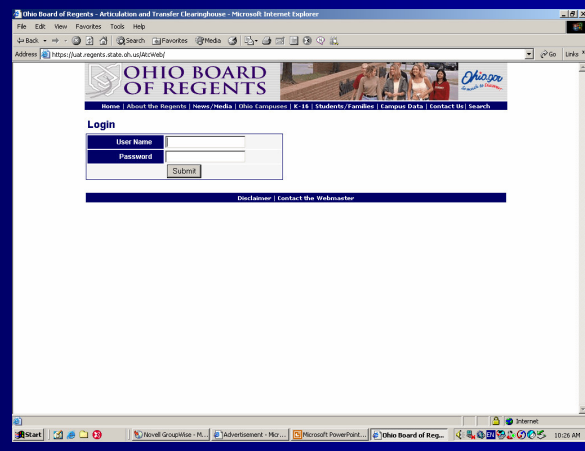
Sending institution – records office transcript request



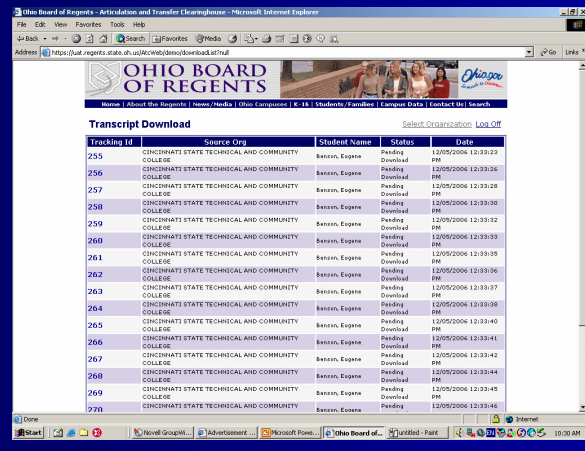
Sending institution – ATC central response



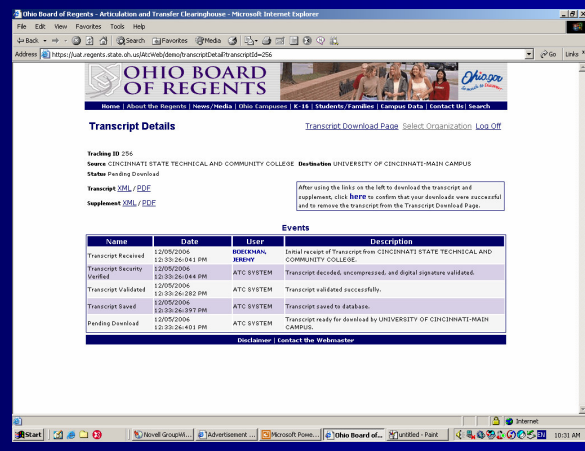
ATC Central – Login Page



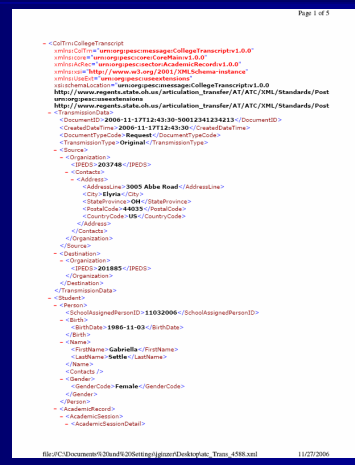
ATC Central – Download Page



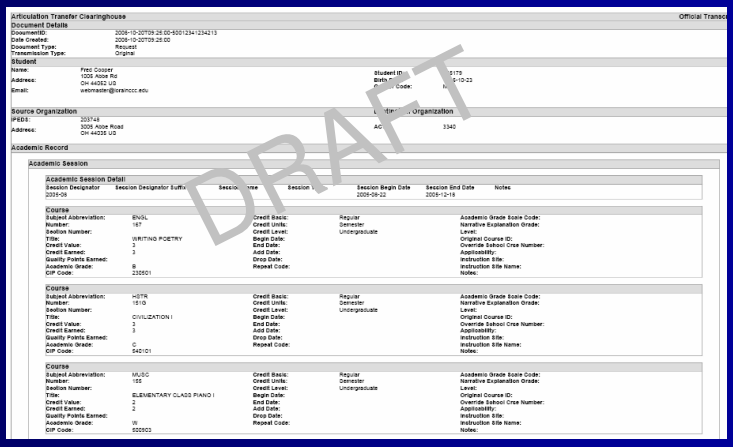
ATC Central – Transcript Details Page



XML Transcript



Screenshot of Draft Formatted Transcript



Articulation Transfer Clearinghouse — Official Transc

Document Details
DocumentID: 2006-10-20T09:26:00-5001234123421 3
Date Created: 2006-10-20T09:26:00
Document Type: Request
Transmission Type: Original

Student
Name: Fred Cooper
Address: 1005 Aide Rd
OH 44262 US
Email: webmaster@oranccc.edu
Student ID: 5179
Birth Date: 5-10-23
Auth Code:

Source Organization
IPEDS: 203748
Address: 3005 Aide Road
OH 44235 US

Destination Organization
ACT: 3340

Academic Record

Academic Session

Academic Session Detail

Session Designator	Session Designator Suffix	Session Name	Session Begin Date	Session End Date	Notes
2005-06			2005-08-22	2005-12-16	

Course
Subject Abbreviation: ENGL
Number: 167
Section Number:
Title: WRITING POETRY
Credit Value: 3
Credit Earned: 3
Quality Points Earned:
Academic Grade: B
CIP Code: 230501
Credit Basis: Regular
Credit Units: Semester
Credit Level: Undergraduate
Begin Date:
End Date:
Add Date:
Drop Date:
Repeat Code:
Academic Grade Scale Code:
Narrative Explanation Grade:
Level:
Original Course ID:
Override School Crse Number:
Applicability:
Instruction Site:
Instruction Site Name:
Notes:

Course
Subject Abbreviation: HSTR
Number: 1510
Section Number:
Title: CIVILIZATION I
Credit Value: 3
Credit Earned: 3
Quality Points Earned:
Academic Grade: C
CIP Code: 540101
Credit Basis: Regular
Credit Units: Semester
Credit Level: Undergraduate
Begin Date:
End Date:
Add Date:
Drop Date:
Repeat Code:
Academic Grade Scale Code:
Narrative Explanation Grade:
Level:
Original Course ID:
Override School Crse Number:
Applicability:
Instruction Site:
Instruction Site Name:
Notes:

Course
Subject Abbreviation: MUSC
Number: 155
Section Number:
Title: ELEMENTARY CLASS PIANO I
Credit Value: 2
Credit Earned: 2
Quality Points Earned:
Academic Grade: W
CIP Code: 500903
Credit Basis: Regular
Credit Units: Semester
Credit Level: Undergraduate
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End Date:
Add Date:
Drop Date:
Repeat Code:
Academic Grade Scale Code:
Narrative Explanation Grade:
Level:
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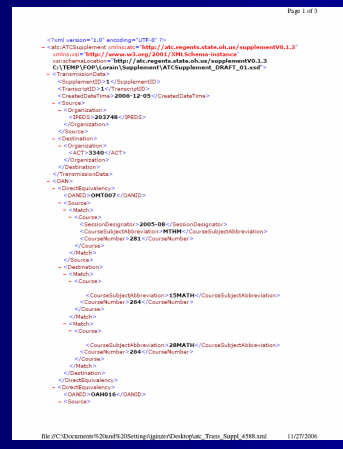
Override School Crse Number:
Applicability:
Instruction Site:
Instruction Site Name:
Notes:

DRAFT

XML Supplement



Page 1 of 3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- <TransmissionData>
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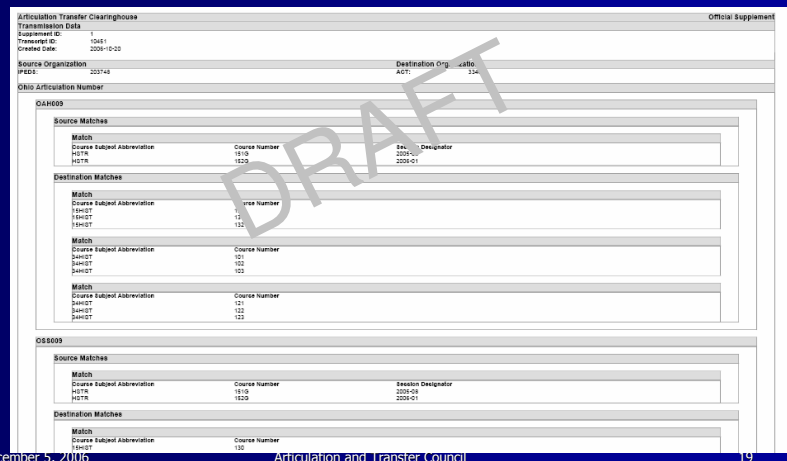
Screen Shot of Draft Formatted Supplement


Articulation Transfer Clearinghouse — Official Supplement

Transmission Data
Supplement ID: 1
Transcript ID: 10461
Created Date: 2006-10-20

Source Organization
IPEDS: 203748

Destination Organization
AGT: 334

Ohio Articulation Number

OAH009

Source Matches

Match		
Course Subject Abbreviation	Course Number	Session Designator
HGTR	1519	2006-08
HGTR	1620	2006-01

Destination Matches

Match	
Course Subject Abbreviation	Course Number
15HGT	1[illegible]
15HGT	12[illegible]
15HGT	132

Match	
Course Subject Abbreviation	Course Number
34HGT	101
34HGT	102
34HGT	103

Match	
Course Subject Abbreviation	Course Number
34HGT	121
34HGT	122
34HGT	123

OSS009

Source Matches

Match		
Course Subject Abbreviation	Course Number	Session Designator
HGTR	1519	2006-08
HGTR	1620	2006-01

Destination Matches

Match	
Course Subject Abbreviation	Course Number
15HGT	130

DRAFT

Acknowledgements

- Lorain
  - Trey Mitchell
  - Marjorie Martinez-Benson
- University of Cincinnati
  - Bob Miller
  - Barb Combess
  - Doug Burgess
  - Wendy Lambing
  - Fran Meyer

Acknowledgements

- Regents - Articulation and Transfer
  - David Barber
  - Brett Berliner
  - Paula Compton
  - Travis Dowds
  - Alex Leader
  - Jon Taffel
- Regents - IT
  - Ian Davis
  - Mike McGee
  - Roman Rudy
- Regents - HEI
  - Jeremy Boeckman
  - Daniel Bower
  - Eric Burke
  - John Chiu
  - Jamie Clarke
  - Jerome Hampson
  - Jay Johnson
  - Stephanie McCann

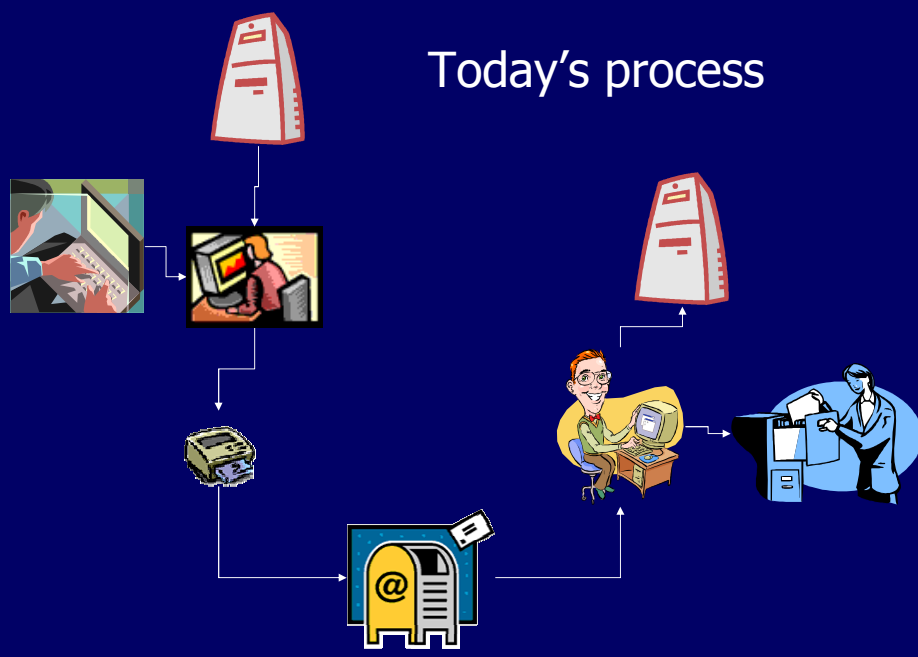
Where are we now – Central Clearinghouse?

- Completed hardware and software procurement
- Have implemented 3 development and test environments at Regents
- Have started planning for hosting production environment
- Established development and testing infrastructure

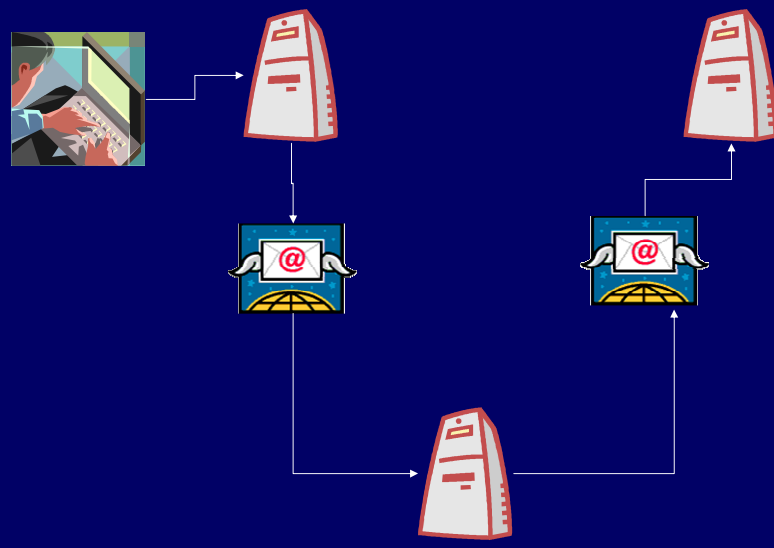
What will be different in production releases?

- Additional security surrounding the Central Clearinghouse
- Sending institution will have an option to log onto the Central Clearinghouse to manually upload transcripts via web page interface
- Receiving Institution may opt to receive the transcript and supplement in the agreed upon national standard format via web service and process the information electronically into its SIS, articulation tables, and degree audits

Today's process



Long term new process



Security considerations

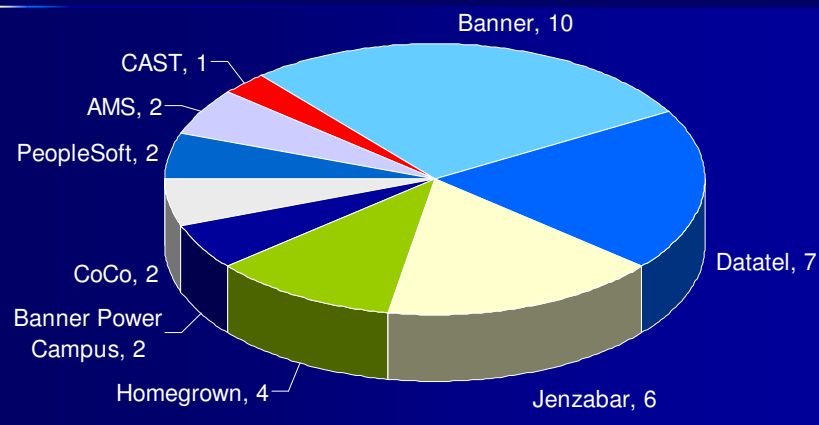
- Message
  - Transcript came from whom it was sent
  - Transcript has not been changed since it was sent
  - No unauthorized eyes have seen it
  - Transcript is being sent to whom it should be sent
  - Intended recipient is only one that can read it
- Central Clearinghouse
  - Secure and reliable facility
  - Role-based authentication and authorization
  - Firewalls
  - Disaster recovery policies

Deployment and Implementation

Deployment strategy considerations

- Which institutions will go into production use first?
  - What is the level of readiness?
    - Technology
    - Business Processes
  - What is the level of interest?
  - What software platform is being used?
  - How is transfer evaluation done today?
  - What third party products are in use?
  - What SIS are in use?
  - Are there any SIS changes or upgrades planned?
- Which institutions will be part of the pilots?

Student information systems



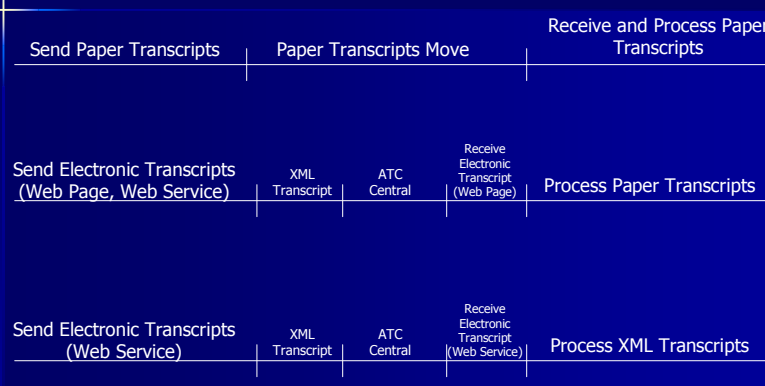
SIS Considerations

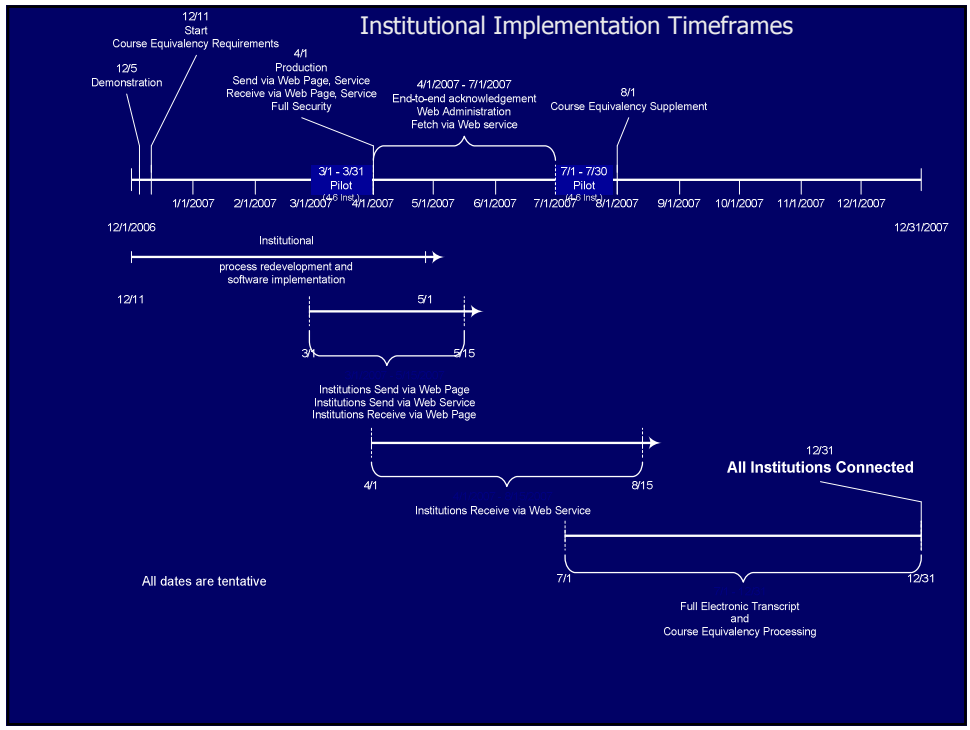
- Known Changes
  - 1 CAST to Jenzabar
  - 1 AMS to PeopleSoft – 1/09
  - 1 AMS to TBD (RFP)
  - 1 Homegrown to Datatel – 2/07
  - 1 Homegrown to PeopleSoft - 2009
  - 1 Jenzabar TE to TBD – Fall 2008
  - 1 COCO to TBD (RFP)
- Native PESC XML Support
  - Banner 7.3
  - PeopleSoft 9.0

Institutional support so far

- Established 3 centers focused on institutional software development needs
- Worked with 2 other institutions to validate transcripts
- Initiated bi-weekly communications with SIS center leads
- Initiated monthly communications with all institutions to facilitate the technical implementation as well business process redevelopment
  - Will go to bi-weekly
- Added Regents staff to assist institutions with testing and support.

Institutional Process Evolution





Institutional implementation needs

- Identify single point of contact for all ATC implementation matters
- Document existing business processes
  - Send transcript
  - Receive transcript
  - Received-transcript processing
- Identify needed changes to sending and receiving processes
- Document institutional project implementation plan and merge with ATC Central implementation plan

Additional support under consideration

- Peer reviews of business processes
  - Possible Business Process Redevelopment Conference
- Third-party Software Conference
  - Docufide, IMS, Credentials, ScripSafe
- Possible on-site consulting
  - Pass 1 – Process design, environment assessment
  - Pass 2 – Interface and process implementation

What we need from the council

- Identification of single point of contact at each institution for ATC implementation who will
  - Work with Regents staff to develop the institutional project team and project plan,
  - Have knowledge of the IT infrastructure,
  - Be familiar with the SIS implementation, and
  - Have transcript processing knowledge
- Support for identifying and implementing needed process changes
- Support for implementing necessary software changes

Thank-you!