

E-Transcript Start-up Checklist

Key to assignments: **Registrar/Enrollment Manager**, **Campus IT Specialist**, **Both**

1) Gain Institutional Buy-in through Cost Savings Analysis and Evidence of SPEEDE Use and Longevity

- a) Determine cost savings in a year's worth of sending and/or receiving transcripts using *the Electronic Transcript Cost Savings Analysis* form
- b) Share *Missouri Opinion Paper* with Campus Administration
- c) Review useful websites:
 - a. AACRAO SPEEDE- <http://www.aacrao.org/speede/index.cfm>
 - b. PESC- <http://www.pesc.org/>

2) Develop your project plan and how it fit into the institutional priorities

- a) Staffing: Who is your EDX Coordinator or team members
- b) What are the staff roles and responsibilities
- c) Determine deliverables, timelines, etc
- d) Testing
- e) Ongoing Operations Maintenance

3) Define your scope

- a) Identify Documents to Exchange
 - i) Transcripts, Applications, Etc.
- b) Will you send and receive, or just send or just receive?
- c) Will you need a PDF?

4) Review capabilities of your SIS- Work with your campus IT to determine this

- a) EDX Capable?
- b) Determine if you will use EDI or XML to extract data
- c) Data Extraction/Data Mapping
- d) Communication Capabilities
- e) Document Management
- f) Reporting Capabilities

5) Register with SPEEDE Server and SPEEDE ListServ

- a) <http://registrar.utexas.edu/speede/help/registration.html>
- b) To subscribe to SPEEDE ListServ:
 - i) Send a message to listserv@listserv.vt.edu
 - ii) Do not put any text on the subject line
 - iii) In the first line of the message type: subscribe speede-L (your first name) (your last name)

6) Share implementation strategies with your colleagues

- a) Share your progress or ask questions at etranscripts@moacrao.org
- b) Check for updates on the MOACRAO website- www.moacrao.org

7) Select trading partners

- a) Who are the top colleges you send to
- b) Who are the top colleges you receive from
- c) Are any of these colleges using the same SIS that your college uses? (while this is not absolutely necessary, this might be a good first partnership since you will be talking the same language)

8) Finalize trading agreements

- a) Agree what makes a document 'official'
- b) Determine which transcript fields need to be delivered
- c) Define the decision making process
 - i) Determine which version should be used
 - ii) Identify problem resolution
- d) Include Mapping Issues specific to the trading partners involved
- e) List version, protocol, security, etc. used

9) Determine what data will be exchanged

- a) Utilize the PESC standards: http://www.pesc.org/interior.php?page_id=183

10) Write code, mapping data, set up crosswalks, etc

- a) XML Implementation guide for college transcripts:
<http://www.pesc.org/library/docs/standards/College%20Transcript/XMLCollegeTranscriptImplementationGuide05162008V%201.1.1.pdf>
<http://www.pesc.org/library/docs/standards/Transcript%20Acknowledgement-Batch/XMLTranscriptAcknowledgementImplementationGuide04-22-2007.PDF>
- b) Choose EDX Translation Software: UT Austin (Quick 'N Easy Software)
 - i) <http://registrar.utexas.edu/speede/tools/qne.html>

11) Automate your process

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| <ol style="list-style-type: none">a) Send<ol style="list-style-type: none">i) Data Extraction to Flat Fileii) Translate Flat File to EDXiii) Send EDX dataiv) Receive Acknowledgmentsv) Reconcile Acknowledgmentsvi) Report/Archive | <ol style="list-style-type: none">b) Receive<ol style="list-style-type: none">i) Receive EDX Dataii) Translate EDX data to Flat Fileiii) Upload into SIS and/or Print Transactioniv) Generate and Send Acknowledgments |
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12) Test with trading partners (sending and/or receiving)

- a) Set up transcript request and response

13) Review and Go Live

- a) Evaluate process
- b) Make modifications, if necessary

14) Continue to share implementation strategies with your colleagues

- a) Share your progress or ask questions at etranscripts@moacrao.org
- b) Check for updates on the MOACRAO website- www.moacrao.org