



BASIC GUIDE TO

Electronic Data *eXchange*

Prepared by the
AACRAO SPEEDE COMMITTEE

AMERICAN ASSOCIATION OF COLLEGIATE REGISTRARS AND ADMISSIONS OFFICERS



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Electronic Data *eXchange*



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Acknowledgments

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The AACRAO SPEEDE Committee is a standing committee of AACRAO that represents the interests of the AACRAO community in its standards-setting work with PESC.

AACRAO SPEEDE

MISSION

Facilitate the creation, maintenance, understanding, and adoption of electronic education records exchange standards in the secondary and postsecondary education community.

- Promote adoption and implementation of standards.

- Provide advisement, training, resources, and implementation support.
- Participate in standards development and maintenance.

VISION

Expand electronic education records exchange in the secondary and postsecondary education community by increasing visibility of standards, resources, and best practices and by reducing implementation and interoperability barriers.

OBJECTIVES

- Advance understanding and adoption of electronic exchange of education records through networking, webinars, sessions, and workshops.
- Develop and maintain standards for the electronic exchange of education records in conjunction with the appropriate national and international standards-setting bodies.
- Provide tools and support for institutions.

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Jeff Elliott has been with the University of Missouri (UM) System for more than ten years. He is Senior Manager of Enterprise Data Warehouse and Reporting and is responsible for data warehousing, enterprise reporting, and the enterprise budget and planning software Hyperion. His teams support the UM System and four campuses across the state. He represents the data domain on the Division of IT Enterprise Architecture Review Board and has been involved in electronic messaging and data exchange, first in public health and now in higher education for more than 15 years. He currently serves as Chair for the AACRAO SPEEDE Committee and represents AACRAO on the PESC Change Control Board. Jeff has served on the AACRAO SPEEDE Committee for more than four years.

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Doug Holmes has been a software developer at the Ontario Universities' Application Centre (OUAC), a centralized admission application processing service for the twenty universities in Ontario, Canada, since 1995. He was part of the original team that developed OUAC's EDI-based postsecondary transcript exchange system and has augmented that system for PESC XML transcripts (high school and postsecondary). He has worked with calculating GPAs from incoming electronic transcript data and has supported OUAC's various proprietary admission application exchange systems. Doug was also part of the team that mapped and implemented PESC XML standards for both the Admissions Application and Test Scores as part of OUAC's new data exchange process with university partners. He served as the Association of Registrars of Universities and Colleges of Canada (ARUCC) representative to the AACRAO SPEEDE Committee from 1998

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Joey LaConte is a Colorado native who has been working as an IT professional for more than fifteen years at the University of Colorado Boulder. As Associate Registrar for Technology, Communication, and Data Reporting, he manages a team of seven staff members, helping to automate business processes in the Office of the Registrar. He oversees operational reporting for student records and enrollment communications; designs, develops, and manages data-driven services; collaborates and contributes to campus and UC system-wide initiatives involving the data warehouse, CRM/e-communications, and document management. Previously, as technical lead for web services on campus, Joey became familiar with XML standards and structured data. Joey currently serves as Vice Chair of the AACRAO SPEEDE Committee and enjoys opportunities to contribute and learn on the national level while helping to provide resources as Colorado institutions of higher education explore the implementation of electronic data exchange, and adopting a formal schema for exchanging transcript data.

Michael Maysilles

Michael Maysilles joined the SPEEDE Committee at the 2017 AACRAO Annual Meeting. He began his career as Assistant Registrar for Scheduling and Registration in the Office of the Registrar at Northwestern

University in 1998, shortly after finishing a master of music degree. He became aware of the SPEEDE Committee through his mentor, University Registrar and SPEEDE Committee member Suzanne Anderson. During this time Michael began attending AACRAO annual meetings. Subsequently, he served as Registrar at Gettysburg College, Caldwell University, and New Jersey Institute of Technology (NJIT). He also served as Director of Assessment and Compliance at NJIT and as Director of Institutional Research (as well as Registrar) at Caldwell University, where he currently serves as a Special Projects Consultant. His specific interests in the SPEEDE Committee are future technologies (particularly Blockchain) in higher education, ease of secure data exchange, and SIS integration of data exchange.

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Sue Reyes has worked at San Diego State University (SDSU) for more than fifteen years, providing information technology support for enrollment services in a variety of projects and tasks. She has played a key role in paperless application and electronic transcript processing. She is the main technical support for EDI transcript processing and document imaging within enrollment services as well as the lead developer for SDSU's OnBase ECM software. She has also served as an Oracle Application Developer, EDI Developer, and SQL DBA and is a Certified OnBase System Administrator and OnBase Workflow Administrator. Sue joined the AACRAO SPEEDE Committee in 2012 and

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Matthew Schill has been a SPEEDE committee member since December 2015. He has been with the University of Nebraska since 2011 and served at Creighton University for ten years previously. He has presented numerous sessions at AACRAO, NACRAO, HEUG, and other vendor conferences. Matt is very involved in AACRAO and is an alternate on the AACRAO Nominations and Elections Committee 2018–19. Career highlights include: University of Nebraska Omaha (UNO) Campus Functional Student Records Lead and Campus Integration Team for Nebraska Peoplesoft Student Information System (NeSIS); UNO campus lead for mobile instance of Peoplesoft for registration and other student services; implementation of e-transcript initiative for entire NeSIS system and UNO campus, providing students with electronic

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Monterey Sims

Monterey Sims has worked at the University of Phoenix for 25 years and is currently Director of Admissions and Evaluation. She spearheaded efforts to implement electronic transcript exchange at the University of Phoenix, resulting in improved student and staff experiences. Monterey and her team received recognition from Southwest Alliance for Excellence, receiving their Showcase in Excellence Award for the Transcript Acquisition Process. She and her team have also received the PESC Best Practices Award for the Electronic Transcript Acquisition Process. Monterey has been a member of the AACRAO SPEEDE Committee since 2008 and is actively involved in AACRAO, PACRAO, and PESC. She also serves on the National Student Clearinghouse SPEEDE Server Advisory Committee and the PESC EdExchange Steering Committee.

Introduction

This guide has been written and updated by past and present AACRAO Standardization of Postsecondary Education Electronic Data Exchange (SPEEDE) Committee members to address the most commonly asked questions regarding electronic data exchanges related to education records, including matters relating to traditional electronic data interchange (EDI) standards and contemporary extensible markup language (XML) data exchange standards for education records as shaped by the P20W Electronic Standards Council (PESC). Additional information regarding newer popular methods of electronic records exchange, such as Portable Document Format (PDF) and JavaScript Object Nota-

tion (JSON), have been included along with relevant emerging technology trends in electronic transcript exchange.

The AACRAO SPEEDE Committee has compiled education record electronic data exchange (EDX) related technology tips and resources in one place to help AACRAO members and their institutions understand, analyze, and implement EDX of education records. Implementation of EDX is the best thing to do for the student experience as well as for the safety and security of student education records. Additional benefits to the institution include efficiency gains, cost savings, and employee job satisfaction.