Academic Information Office Needs Assessment

**Needs Assessment Report**

**Report Title:**
Academic Information Office Internal Documentation Project – Phase One

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**Executive Summary**

During this period ITS Learning & Professional Development (LPD) conducted an initial needs interview with Academic Information Office (AIO) business analyst Andrea Stalker and other members of the AIO. Almost every member of the AIO completed a job analysis questionnaire. These documents form the basis of this initial needs report. This effort provided us with the initial understanding necessary to coordinate efforts between the AIO and LPD groups. Phase one of the project will cover the following

**Goals**

The goals of this phase were:

1. To familiarize the Learning & Professional Development team with the structure of the Academic Information Office and clarify each of the roles and responsibilities of the members of the AIO.
2. To identify the principle needs for AIO learning and documentation and identify any issues as perceived by the members of the AIO.
3. To create a framework for AIO documentation structure and helping each of the groups to understand what the other areas do.

**Process**

Completing phase one of the needs assessment involved:

1. Initial training interview with Andrea Stalker, Margery Sorenson and Eric Bradford
2. Meetings with each area of the AIO to explain the process and get more background through group interviews with each AIO team member
3. Gather data from each AIO team member in the form of a job analysis by each member
4. Synthesize the findings into a manageable document
Recommendations

1. That LPD provide training and support to the AIO for using SharePoint. LPD will work with AIO members to begin to plan the structure of their internal documentation and self-directed learning efforts. Workflows are another SharePoint technology we should investigate to address concerns to how to teach people how to follow a process correctly.

2. Training or how-to documents and videos can then be created based on the task analyses. LPD will assist where needed in the creation of documentation, tutorials, and training requests.

3. That the entire office standardize on Office 2007 with support and training as needed from ITS-LPD.

4. Early idea is to have them store most knowledge in the SharePoint knowledge base with documentation and videos embedded where necessary.

5. In phase two, project members should continue to identify and refine the job task analysis for each position in the Academic Information Office (AIO).

6. Investigate some possible uses of social media to support their processes and state-wide clients. Social learning might also help with their desire to know what each area does and to cross train. Lack of an easy way to communicate naturally and effortlessly between groups and team members was also mentioned frequently.

7. The main concerns from the interviews and the job analysis are that each position needs to be able to identify and then record how to complete each main task that each position does. This will allow team members to understand the needs of a particular position and assist when a particular person has a heavy cyclical workload or is out on an extended leave of absence.

8. Adopt a content management system so that Web development responsibilities can be dropped and less-technical members can easily assist with updating online information for end-users)

Findings

AIO Office Functional Areas (Alphabetical Order):

**Academic Catalog**
- Trish Rensink – Coordinator

**AIO Administrative Office**
- Ron Pitt – Associate Provost of Academic Administration
- Nicole Morrow – Program Coordinator, Sr

Head of the Academic Information Office
Not part of AIO, but works in Ron Pitt’s office and was mentioned in some of the job analyses as a person that some of the areas work with.

**Business Analyst – AIO**
- Andrea Stalker

**Course Catalog**
- Lisa Williams – Coordinator

Update and maintain PeopleSoft with all Course Catalog changes approved by the University Curriculum Committee (UCC) and the University Graduate Committee (UGC), as well as updates to courses in between UCC and UGC cycles.

Update and maintain the following Academic Structure tables in PeopleSoft: Institution, Grading Scheme, Level/Load Rules, Campus, Academic Career, Career Pointer Exception Rules, Degree, Academic Group, Academic Organization, Academic Program, Academic Plan, Academic Subplan, Academic Subject.

**Degree Progress**
- Eric Bradford – Coordinator
- Margery Sorensen – Coordinator

The role of degree progress (DP) is to provide online, real time academic advising information to all undergraduate students, their advisors and faculty. This position ensures that DP functions properly so that students/advisors get accurate information on degree requirements and what progress the student has made toward completing a degree. This position sets up (builds) new requirements annually and maintains the Academic Advising (Degree Progress) module in PeopleSoft.

**Schedule of Classes**
- Theresa Rogers – Coordinator

This position coordinates the on-campus fall and spring Flagstaff mountain campus class schedule. This includes creating and enforcing a timeline to build the schedule (work with Extended Campuses), creating and maintaining class dynamic date rules, editing class units and grading, building and maintaining topics in the Course Catalog, building entity groups and requirement groups as needed for class reserve capacities, working with Registrar’s Office staff to process study abroad and national student exchange grade memos, updating class records and/or student records with Extended Campuses and the Registrar’s Office per curriculum committee approvals, creating and/or running reports to keep the schedule clean for reporting and grading, testing and implementing system upgrades, building and improving SoC business processes and procedures, recommending policy changes related to the SoC, training faculty and staff in use of the Schedule of Classes (SoC) and CC via in person instructor-led training, online documentation and videos/tutorials, serving on university committees related to the SoC, keeping the
schedulers informed of any changes in the system or to procedures, keep them on track, and assisting in maintenance of Course Catalog and Academic Structure as needed.

Transfer Articulation

- Nicole Harris – Coordinator, Out of State
- Danye Johnson – Coordinator, Arizona Colleges & Universities
- Darrelle Martin – Coordinator, Arizona Colleges & Universities

This position supports the transfer articulation process in coordination with the Arizona Transfer Articulation Support System (ATASS). The primary role of this position is to establish course equivalencies for all courses from two-year colleges and universities. The course equivalencies are uploaded into the PeopleSoft Transfer Credit module in order to provide equivalencies for students transferring courses. Two positions in this area focus on Arizona public community colleges and universities and one position focuses on non-Arizona institutions and Arizona private institutions.

Initial Training Needs Interview

The initial training needs interview was conducted on April 6, 2009 by Steve Sorden with Steve Montague and Jason Edington from ITS-LPD and Andrea Stalker and Margery Sorensen from the AIO. In the interview Andrea and Margery explained that the AIO has a need for internal documentation to record team knowledge in case there is turnover and for cross training of areas within the AIO. They want to be able to create and update documents easily and locate team knowledge when they need it. They want documentation maintenance to be easier and they want a good document management system, knowledgebase and a way to view how-to videos. Eventually there will be a need for external documentation for end users, but the need right now is for internal documentation and possibly training in a few areas.

They are preparing to go from PeopleSoft 8.9 to 9.0 over the next year. They would like to have a good overview of what each area does and who to talk about specific issues when they arise. One example of a need that needs to be met is that they have not been able to cross train and help out when certain areas are busy and others aren’t. The current training and documentation exists in the Contribute (maintained by ITS-LPD) for PeopleSoft 8.9, plus some older stuff outside of Contribute for 8.0. Almost all of the training in the past has been on the job and through the existing documentation. There has been little formal training in the department.

The intended audience for the documentation is the nine members of the AIO who are listed above and a few student workers. The subject matter experts (SME) are the same nine AIO members. ITS-LPD will have access to the SMEs as time and their workloads permit. Trish Rensink is part-time and not always available. Theresa Rogers works on campus Mondays through Wednesdays and telecommutes from home the other days. All employees in the AIO are reasonably computer literate and will participate in developing the documentation and training over the course of a year as their workloads permit. They are motivated to create new documentation and job aids for internal support and learning.
AIO members are all using Windows XP. They have audio speakers or headphones, broadband Internet, but no microphones or cameras on their individual computers. They are using a mix of Office 2003 and 2007.

The department plans to slowly develop the documentation over the next year. The life expectancy of the LOUIE documentation is one to one and a half years before the 9.0 upgrade. The current documentation will change approximately 25% during the upgrade from 8.9 to 9.0. After the 9.0 upgrade, the documentation will only need to be changed incrementally as pieces of PeopleSoft are upgraded (they are moving away from major version upgrades) and should last for years.

Course Catalog

1. Main Job Responsibilities

The coordinator for the Course Catalog (CC) is responsible for all aspects of implementing and maintaining the PeopleSoft (PS) catalog for all NAU undergraduate and graduate plans, courses, requisites, course fees, etc. Key responsibilities include: build and maintain CC set-up for all NAU majors, minors & certificates, build courses, requisite groups, student groups, entity groups & milestones, assist in maintenance of Academic Structure, troubleshoot system problems, test and implement system upgrades, build and improve business processes related to the CC, recommend policy changes related to the CC, train faculty and staff in use of the Schedule of Classes (SoC) and CC, serve on university committees related to the CC.

- (25%) Reviews curriculum submitted by academic units to the University Curriculum Committee and the University Graduate Committee and attends all meeting of these two committees. Enters all new courses, all course changes and course deletions into PS
- (10%) Maintains and changes academic programs, plans, sub-plans and degrees in PS
- 10% - Maintains and changes course requisites, equivalent course groups, course requirements designations, and course fees.
- 5% - Coordinates curricular changes with Degree Auditors, Articulation Facilitators, Schedule of Classes coordinator, Academic Catalog Coordinator and academic departments.
- 20% - Daily end-user support
- 5% - Coordinates material in Course Catalog database with Academic Catalog Coordinator with respect to Web presentation and content of academic programs.
- 10% - Conducts all course catalog clean up
• 10% - Works with AIO Business Analyst to investigate problems with the system and develop solutions to problems. Works with AIO Business Analyst to develop new processes and procedures to make system more efficient and easier to use.
• 5% - Conducts bi-annual review of courses not offered for three academic years.
• Conducted AIO functions of January 2008 NAU-Yuma restructure and implementation. – one-time.
• Conducted key functions of summer 2007 and summer 2008 academic restructures and their implementations. - annually.
• Participated in fall 2006 upgrade to PS8.9, from fit-gap to implementation. – approximately every three-four years.
• Attend and participate in Campus Information Team and Process Flow meetings, on an as-needed basis. – two-three times/year.
• Reviewed and updated documentation for Updates & Fixes and coordinate testing for AIO office, including Transfer Credit, Degree Progress, Schedule of Classes, and Course Catalog. – every three months.
• Submit SOS tickets reporting issues with PeopleSoft processing. – as needed.
• Research and submit System Change Requests (SCRs) for changes to PeopleSoft system to improve efficiency and/or increase functionality. – as needed.
• Confer with developers on testing, migration, and implementation of new processes and process changes in PeopleSoft. – as needed.
• Provide end-user support for academic and business units across campus. - daily.
• Develop queries for data analysis/integrity utilizing PS Query. - weekly.
• Submit appropriate security documentation to enable cross-training with Business Analyst. - annually.
• Review and analyze curriculum submitted by academic units to the University Curriculum Committee and University Graduate Committee and attend all meetings of the two committees. – weekly.
• Enter all new courses, course changes, and course deletions in the Louie Course Catalog. – twice/month.
• Maintain and update the university’s Academic Structure in PeopleSoft. – annually.
• Maintain and change academic programs, plans, subplans, and degrees in the Louie Course Catalog. – twice/month.
• Maintain and change course requisites, equivalent course groups, requirement designations, and course fees. – twice/month.
• Coordinate curricular changes with Degree Progress, Articulation Facilitators, Schedule of Classes Coordinator, Academic Catalog Coordinator, and academic units. – twice/month.
• Serve on Ed Tech Team as liaison between AIO and OLE, e-Learning, Distance Learning, and Cline Library. – bi-weekly.
• Develop training materials for Schedule of Classes training. - annually

2. Equipment & Tools Used
• Computer, telephone, printer, copier, fax
• PeopleSoft, Excel, Word, Access, Outlook, SnagIt, Adobe, Internet Explorer

3. Knowledge and skills required to be successful in this job:
• Historical experience with and knowledge of NAU’s administrative policies and procedures, including those related to Oracle/PeopleSoft.
• Productive working relationships with administrators, faculty, and staff across campus.
• Initiative and a record of follow-through.
• Extensive database experience and analytical skills, resulting in accurate data-based reporting, aiding in informed planning and decision making.
• Excellent critical thinking and collaborative skills.
• Excellent oral and written communication skills.
• Ability to work in a team and identify overlapping areas for coordination, sharing information, and training.
• Skill in carrying out, reviewing, and reporting on all aspects of technical work.
• Strong skills using MS Word, Excel, Project, Access, and Internet Explorer.
• Ability to concurrently handle multiple priorities.
• Ability to successfully design and implement relational databases to manage distance learning cohorts, course scheduling, course evaluation, faculty load, Promotion and Tenure, and other data requests from the dean, assistant dean, and chairs. Work closely with PAIR on many data and reporting requests.
• Review and analysis of curricular requests and develop business processes and procedures for their successful implementation in PS. (Currently developing outlines for a major academic restructure that will greatly reduce the amount of time and resources spent on academic restructures.)
• Historical, functional knowledge of PeopleSoft
• Professional connections across campus in administrative and academic departments
• Communication among our office team members and constituents across campus

4. Training priorities for position:
• The Course Catalog, how it works, and how it ties into the Schedule of Classes. Familiarity with curricular processes and approvals, then building the curriculum in PS.
• Academic Structure – how it works, how it looks, what it looks like to an academic department, how to build it in PS.
• Training that contributed to success in this position: Undergraduate business classes, PeopleSoft training, SQL training.
Degree Progress

1. Main job responsibilities:

Currently Margery Sorensen and Eric Bradford form the DP group in AIO. The bulk of Margery’s interaction is in answering questions and solving problems with advisors across NAU. She is sort of the DP Help Desk. Eric tends to focus on the deeper technical issues.

Degree progress draws information from many parts of LOUIE. DP works with people in functional offices to resolve DP issues that affect, but may not originate with DP. Sometimes functionality outside of DP can improve our service to users so they partner with folks to make that happen.

Important areas that provide information needed to build Degree Progress include Transfer Articulation, Course Catalog and Academic Catalog. DP works primarily with the Registrar’s Office, specifically transfer credit evaluators, Student Records, and the Graduation Office. Admissions functions also affect degree progress.

- Build and maintain degree progress set-up for all NAU undergraduate plans and subplans.
  - To build the approved curriculum for each academic year using the Academic Advising module. The 3 primary tools used to build the curriculum are; Course-lists, Requirements, and Requirement Groups.
  - Maintain the current Degree Progress Setup in consultation with advisors and faculty across campus. Repair any errors or misinformation in the setup.
  - To review and attend the yearly University Curriculum Committee materials/meetings to insure curriculum is buildable within the limitations of the PeopleSoft system.
  - Solve system problems as reported by faculty and advisors
  - Input student exception and student individualized plans.
- Continually work with departments to find ways to streamline curriculum in order to provide a more accurate and automated system. Maintain and improve business processes.
- Build relationships with campus community to promote Degree Progress
- Assist with system testing for updates and fixes.
- Maintain the Degree Progress Web-page, most notably the yearly Program/Plan spreadsheets.
- Assist business analysts as needed in AIO projects.
- Answer questions and solve problems for advisors : 15+ times a day via phone and email
• Maintain set up in DP, correct errors, update requirements, etc.: 4+ times a day. Time required depends on the complexity of the problem.
• Input exceptions to individual student report: as many as I can get done, varies from 5 to 60 in a day.
• To review and attend the yearly University Curriculum Committee materials/meetings to insure curriculum is buildable within the limitations of the PeopleSoft system.
  o With an understanding of the limitations of the system I review the curriculum forms to find requirements that may be difficult to maintain, require a lot of personal hands on work, or that are impossible to build. I record my findings and return them to the departments for further review before the final meeting.
  o There are approximately 10 UCC meetings a year beginning in the fall and ending in early spring.
• To build the approved curriculum for each academic year using the Academic Advising module. The 3 primary tools used to build the curriculum are; Course-lists, Requirements, and Requirement Groups.
  o With the curriculum changes in hand I begin to either modify current setup or build new requirements. Each Plan (major, minor, certificate) may have 1 to 10 course-lists, 1 to 5 requirements, and 1 to 5 Requirement Groups. For UCC changes new course-lists, requirements, and requirement groups will be built numerous times daily.
• Maintain the current Degree Progress Setup in consultation with advisors and faculty across campus. Repair any errors or misinformation in the setup.
  o Degree Progress is a work in progress. As more and more individuals use the system new errors or limitations become apparent. I will work daily to improve the current set-up (often going back several years) to refine set-up and insure that it works for the most number of students possible.
• Continually work with departments to find ways to streamline curriculum in order to provide a more accurate and automated system.
  o As more and more departments become reliant upon the standardized and reliable Degree Progress reports for their students many will wish to make changes in order to make it more automated and functional.
  o With an understanding of the limitations of the systems I often will make suggestions to departments on how to make their curriculum work more efficiently with the system and yet maintain the standards that professional field requires to remain competitive in today's market. This is done per department request, perhaps 3 to 5 times a year. The modifications can take less than a day to 3 weeks to complete.
• Maintain the Degree Progress Web-page, most notably the yearly Program/Plan spreadsheets.
General information about Degree progress is updated an average of 2 or 3 times a year. Most notably would be the program/plan spreadsheets used by many departments (including me) for exceptions and maintenance of curriculum.

- Attend the Council for Academic Resources and Services
- Provide DP information to the academic advising community
- Get feedback on how DP is performing and what improvements could be made
- Keep in touch with the advising community and advising issues across campus

2. Equipment and tools used to perform the degree progress roll
   - A single computer with internet access, dual-screen monitor, PeopleSoft 8.9, Microsoft Office 2007,
   - LOUIE Degree Progress Functions,
   - Student Records functions e.g., program/plan screens, transfer course, etc.
   - Access to the PeopleSoft ADV listserv

3. Knowledge and skills required to perform the job:
   - Detailed knowledge of the Academic Advising module, DP functions and how they interact with other parts of LOUIE
   - Familiarity with the Northern Arizona University Curriculum (Liberal Studies, majors, minors etc.)
   - Knowledge of how advisors work with students and what their needs are for DP
   - Strong problem solving skills, desire to dig for a cause and test solutions, strong analytical skills and attention to detail
   - Equally important to my role are interpersonal skills while working with advisors and faculty. These include strong listening and diagnostic skills, a sense of how much to explain to people since many folks don’t care why there is a problem, ability to simplify without being condescending, patience, humor, empathy, etc.

4. Critical success factors for effective performance of this position:
   - Build accurate degree plans in DP based on approved curriculum. Test DP thoroughly to find problems before customers have to report them. Help people feel confident interpreting a DP report. Promote DP to students.
   - Going forward, it will be important to promote DP to administration as a possible reporting and planning tool. There are capabilities in DP that we haven’t used yet that could be very valuable in this respect.
   - Good communication between departments/advisors/faculty and AIO staff.
   - Support for the PeopleSoft system and a willingness to accept and work around its limitations.
   - A solid manager that supports our goals and assist in enforcing limitations to curriculum in relation to the system and the function of the university.
   - Annual curriculum changes documented through the UCC.
   - An understanding of the PeopleSoft Advisement Module
   - Basic understanding of other AIO functions such as Course Catalog and Transfer Articulation.

5. Perceived barriers to success:
• DP needs lots of maintenance and there is little time to experiment with new or better ways to do things. I hate managing the status quo and would like to be more proactive in trouble shooting and improving and promoting this function.
• There is no training. We figure things out on our own and while it’s good learning, it also takes a lot of time and trial and error.
• Lack of communication from departments/advisors/faculty.
• Unwillingness to compromise on system limitations.

6. Most difficult aspect of the job:
• Keeping the campus community trained on how to use DP, especially the Distance Learning advisors. In some areas there is high turnover and with no one to help new folks learn the job.
• Repetitive tasks (inputting exceptions) and answering the same questions over and over.
• Finding an error in the set-up and lack of knowledge to resolve it.
• Curriculum requirements with complex set-up and “If-Then” statements

7. Suggested Training Priorities:
• To understand the basic set-up of Degree Progress (Course-lists, Requirements, and Requirement Groups. Thorough understanding of basic DP functions (building degree plans, troubleshooting, inputting exceptions, etc).
• Understand the big picture; how AIO work together and how it serves the university. Know how other AIO functions impact DP.
• Understand how advisors work with students and how they use DP.
• Knowledge of where the curriculum comes from and the relative flow.
• A remedial understanding of NAU’s basic curriculum requirements. (University Requirements, Diversity, Liberal Studies, Majors, Minors, and electives).
• Know who to contact for specific problems outside of DP and/or where to send users when they have questions I can’t resolve.

8. Necessary qualities for success in this job:
• Enjoy helping people. Can’t see them as an interruption
• Be persistent when diagnosing problems and testing solutions
• Attention to detail and being comfortable with detail
• Sense of humor and diplomacy skills can come in handy
• Flexibility.
• Open and friendly communication.

9. Contributing factors for success in this position:
• Representing DP on various committees helps me stay informed about what’s going on outside of the AIO.
• Building trust with people around the university helps me stay informed.
• An open and friendly attitude.
• A willingness to get the job done when deadlines approach.
• Excellent communications between other individuals in my department and with other departments.
1. Main job responsibilities:
   - (4%) Coordinate the Fall and Spring on-campus Schedule of Classes - running copy fees process, running prior term copy, cleaning up and creating timeline for the build, attaching class level fees, cleaning up and publishing classes once finalized, creating documents to post online prior to early enrollment, ensuring data is correct and as free of errors as it can be, prompt clean up prior to each reporting period, prompt check of Vista access and roll ups, ensure instructors and grading access is in place prior to grading periods, etc. Twice a year in 3 month chunks for the build. Three times a term for the rest, on average. Work with Registrar’s Office and Extended Campuses on this responsibility.
   - (15%) Process any special class changes – unit changes, grading basis changes, creating dynamic dating. Acquire approval and roll class change to student records – work with Ron Pitt and Evie Garcia and Registrar’s Office enrollment area once students are enrolled. Daily.
   - (16%) Process any new course topics – create topic id in Course Catalog per form request from department – work with Extended Campuses on creating those for extended campuses as well. Daily.
   - (30%) Create classes for study abroad and national student exchange – memos as provided by the Center for International Education – work with Registrar’s Office enrollment and grading areas. Weekly.
   - (15%) Keep training and online documentation up to date – work with ISTT. Yearly but email updates more frequently as needed.
   - (10%) Testing- updates and fixes testing per CIT instruction, tools testing and academic restructure testing as well as upgrades, etc. Usually monthly.

   (Approximate percentage varies due to where we’re at in the academic year. I have listed percentages for this May – what I usually call my slow month, along with October typically. Those are the times I usually don’t do my main responsibilities. It starts to flip flop once July gets here with beginning of Fall being the craziest.)

   Important areas that Course Catalog must coordinate with: University Curriculum and Graduate Curriculum Committees, Departments and Faculty, Schedulers around campus

2. Equipment and tools used:
   - PC, dual monitors, Microsoft Office and phone.

3. Knowledge and skills required to perform the job:
   - Type quickly and be organized
   - Knowledge of academic structure and PS course catalog
   - Knowledge of UCC and UGC approvals
   - Work well with many different people

4. Critical success factors for effective performance of this position:
   - Clearly spelled out calendar, Email, IM and phone
   - Business process understanding – when approvals are needed & for what.
• Important areas that Schedule of Classes must coordinate with: University Curriculum and Graduate Curriculum Committees, Departments and Faculty, Registrar’s Office, Extended Campuses, and Schedulers around campus
• Knowledge of PS course catalog, academic catalog and how the Schedule of Classes trickles down from that.
• Knowledge of Registrar’s Office areas and processes and Extended Campus’ class create processes.
• Knowledge of ABOR/UCC/UGC approvals.

5. Perceived barriers to success:
   • Ultimately departments are in charge of their classes. If something is not clean, it’s mainly their responsibility.

6. Most difficult aspects of the job:
   • Dealing with those who think they know everything and never ask questions.
   • Dealing with others that don’t communicate changes that directly impact your area.

7. Training priorities for this position:
   • LOUIE AIO and Student Records pages
   • Processes, timeline, and relationship of SoC to other campus departments or other areas in AIO
   • Business Objects and PS Query (report creation/running/distributing/deciphering results)

8. Knowledge and skills required to perform the job:
   • Knowledge of PS course catalog, academic catalog and how the Schedule of Classes trickles down from that.
   • Knowledge of Registrar’s Office areas and processes.
   • Knowledge of ABOR/UCC/UGC approvals.

Transfer Articulation – Arizona Public Colleges and Universities

1. What other jobs, positions or roles in the organization are important for you in helping you to complete the responsibilities of your job? With whom do you work closely?
   • The other Transfer Articulation Coordinator
   • Also work closely with the Equivalency Coordinator, Nicole Harris,
   • Degree Progress
   • Course Catalog – Lisa Williams / Curriculum Changes
   • Academic Catalog – Trish Rensink / Curriculum Changes
   • Nicole Morrow / Curriculum pre-review, post meeting updates/changes
   • Business Analyst / U&F Testing, Updates/Changes to system, modification implementations,
   • NAU
     o Undergraduate Admissions and Registrar’s Office, Transfer Evaluators
     o Advisors
     o Gateway
   • Non-NAU
     o State staff, AZ public community colleges and universities

2. Main job responsibilities:
(35%) ACETS (Arizona Course Equivalency Tracking System) -
Process forms - Receive forms, review, forward to faculty; upon return, review, research/followup when needed; finalize equivalency decisions
Maintain contacts
Communicating/interface with faculty and state articulation folks
Participate in meetings
Train and mentor newer ACETS processors

(20%) ATFs (Articulation Task Forces) –
Maintain contacts
Read/review all ATF listserv correspondence
Monitor meeting notes, follow up if needed
Common Course Matrices – monitor and update; follow up with faculty as needed
Final approval for actions taken at meeting that affect NAU articulation
Facilitate meetings

(20%) AZTransfer Tools (State articulation web site) –
Degrees and Pathways – update and maintain program information for NAU
Prefix lists – update/maintain for NAU
Chatlines – update and maintain ATF group memberships for NAU

(5%) ATAC (Arizona Transfer Articulation Committee) -
Attend and participate in ATAC meetings and activities
Participate on subcommittees and workgroups as needed
Participate in trainings

(15%) Participate in the day-to-day activities of the office/organization
Attend meetings, trainings, conferences as needed

Encoding
- DARwin (New Rule, Modified Rule, Editorial Rule, Deletion Rule)
- Encoding ACETS (New, Modified, Editorial, Deletion, ATF-CEG, Data)
- Admin CEG (New Archive Rule, Update Archive Rule)
- PeopleSoft (Change to a rule, New rule)
- Liberal Studies/Diversity

CAS/DARS Upload
- ACCESS (CAS Extract (Coursebank), DARS Extract (Rule, Source, Target), Query, Export EXCEL – CSV)
- PeopleSoft (WebFU, LOUIE)
- NAU Coursebank Extract (PeopleSoft, WebFU, U.Select)

Course Lists (Liberal Studies, Diversity, Junior Level Writing, Capstone)
Curriculum (Pre-review, Post Meeting)
Transfer Guides (DARwin, U.Select, Transfer Guide Admin)
Test Credit (PeopleSoft, Academic Catalog)
Website (AIO (except Degree Progress and Out of State Articulation – links only), Academic Catalog, Academic Structure, Course Catalog, Schedule of Classes)
Academic Information Office Needs Assessment

- Transfer Articulation (Transfer Student, Advisor, Faculty and/or ATF Member, Diversity, Transfer Committee Issue Tracker form, FAQ, Transfer Guide Information, NAU LS Program, Glossary, Archived Transfer Guides)
- Course Lists (Diversity, Liberal Studies, Junior Level Writing, Capstone)

- ATF
  - Facilitating (Statewide Updates, CC Matrices, CEG Changes, Submitting ATF-CEG Change form in ACETS)
  - Training for NAU ATF Members

- Chatlines
  - Functions (Query Page – My Forms, Query All Forms, Meeting Host – Update Information, Meeting Chair – Edit Agenda)
  - Administrative (Add A New Contact, Edit Contacts, Edit ATF Prefixes, Add ATF Meeting Report, Manage Action Items)

- Daily correspondence/research – every day
- Encoding – check daily for new courses to encode, encoding of 40 courses can be 2-3 hours
- CAS/DARS Upload – done once a semester, test first in test environment for errors/corrections, can take a few days
- Course Lists – update after monthly curriculum meeting, if needed, depends on volume 1-2 hours
- Curriculum – pre-review for each meeting, again depends on volume, but can take half to a full day, after meetings make necessary changes to rules
- Transfer Guides – updated Fall and Spring semester. Fall takes a few weeks to get all changes for academic year updated. For Spring we just re run transfer guides with new equivalencies, can take a day
- Test Credit – update after curriculum if needed, make changes as requested by departments
- Website – makes changes as needed
- ATF – as ATAC member, facilitate up to 4 meetings in Fall (full day meetings and time to prepare), train and work with NAU ATF members (on-going)
- Chatlines – update information as needed
- ATAC – attend meetings, correspond to listserv questions/issues,

3. Equipment and tools used:
   - Computer with double monitors
   - Web-based tools:
     - ACETS
       1. AZTransfer applications (mentioned above)
       2. DARWin (used for encoding – I use as backup only now)
       3. Microsoft Office, Snaglt, Contribute, FrontPage for AIO Website
       4. DARwin (remoted to ASU server)
       5. Web – CEG Admin, Transfer Guide Admin, ACETS, ACETS Encoding, U.Select, PeopleSoft

4. Knowledge and skills required to perform the job:
• An understanding of the curriculum and the organization, reporting structure, etc., of NAU.
• Understanding of articulation in general.
• Knowledge and understanding of the workings of the state articulation system.
• Excellent communication skills, written and oral.
• Analytical ability; able to think through processes and research, understand history, resolve problems.
• An understanding of the state transfer model, PeopleSoft, and other areas in AIO and how they relate to this position.

5. Critical success factors for effective performance of this position:
• From the state articulation perspective:
  - That we reach students and advisors
  - That we continue to provide and improve useful, integral tools to support seamless transfer
  - That we have buy-in and support of all institutions at all levels (administration to support personnel)
  - That we have interest and active support of representatives in groups that are part of the state system (oversight and functional committees, discipline-specific and non-discipline specific ATFs).
  - That we have continued administrative and legislative support and funding.
• For our NAU organization:
  - That we have the understanding and support throughout NAU (administrators, faculty, advisors, staff) of the established process to support articulation.
  - That we communicate and train to maintain a level of visibility needed to reach students.
  - That we provide integral, accurate rules to be uploaded into PeopleSoft to support the transfer credit processes—once again, to assist students.
• Open communication with others in office, at NAU and around the state. Work that is being done is accurate, which cuts down on the time needed to research, and is done timely
• On the job training and working daily in the trenches.
• Attending state meetings.

6. Perceived barriers to success:
• Lack of understanding, or acknowledgement, on the part of higher administration and some departments at NAU of the tools we have in place to support articulation. There seems to be continual efforts to recreate the wheel and start projects in disregard to the partnerships we have in place.
• The silo effect we experience at NAU, and sometimes amongst institutions we work with throughout the state.
• Lack of established processes and documentation throughout campus. Our organization is actually a little ahead of the curve on this. Overall the campus suffers in this regard—the right hand rarely knows what the left hand is doing.
• Lack of effective communication from administrative levels (even our supervisor) about things that are important to our work.
• The biggest barrier is that I have all the PeopleSoft knowledge versus Danye, so I handle all the duties regarding PeopleSoft, along with the state encoding,
transfer guides, NAU curriculum, etc. She has recently taken over ACETS, which has helped in my workload.

- Another main barrier is the lack of communication and willingness to work together from Undergraduate Admissions who work with the transfer rules in PeopleSoft.

7. Training priorities:
   - PeopleSoft Transfer Credit modules, DARwin encoding, the transfer guide applications, and other tools that my co-worker takes responsibility for
   - Both the generic understanding of articulation and all it entails and specific training on all of the more technical applications. Basic understanding of all of the applications and tools provided by AIO—Course Catalog, Degree Progress, Transfer Articulation—and how they interrelate.
   - I would like to start documenting the many procedures so others can help. For both the state functions and PeopleSoft

Transfer Articulation – Non-Arizona Public Schools & All Private Schools

1. What other jobs, positions or roles in the organization are important for you in helping you to complete the responsibilities of your job? With whom do you work closely?
   - NAU Admissions
   - Evaluators (work through Janet Heinrichs)
   - TS130 / Doc Imaging – Cory Holland & Chris McLaughin
   - Registrars Office (through Elaine Gilman)
   - Transfer Articulation Coordinators (Darrelle Martin & Danye Johnson)
   - Academic Information Office Business Analysts – Andrea Stalker
   - Academic Administrations Office – Nicole Morrow – University Curriculum
   - Degree Progress – Margery Sorensen - for transfer articulation – Equivalency vs Exception
   - Non-Nau - Transfer Articulation, admissions and registrars staff from non-Az Transfer institution

2. Main responsibilities of the position:
   - Non-AzTransfer equivalencies
     - Edit and maintain database for tracking designated equivalencies and provide a reporting process for Academic Departments that communicates this information. – Daily
     - Enters course equivalencies directly on the transfer credit report page of the student information system. –weekly
     - Prepares annual report of all equivalency decisions made and distributes it to appropriate parties.
     - Conducts four-year sunset reviews of all course equivalencies.
     - Update and correct External Organizations in Peoplesoft as needed. – about 1 a month right now.
     - Use ACETS to route courses not approved for central approval to faculty members for course equivalencies. – biweekly
o Maintain web-site content for out-of-state and international equivalencies for students and Advisors/Faculty – as new rules are entered.

o DARwin: New Rule, Modified Rule, Deletion Rule

o ACETS: New, Modified, Data

o PeopleSoft: WebFU, LOUIE, Change to a rule, New rule

o Access: CAS/DARS : DARS Extract (Rule, Source, Target), Query, Export CASIDARS rules to EXCEL - CSV

- Diversity Database
  o Maintain the diversity database. Develop reports from the Diversity Database for use in the update of the web lists and transfer credit rules. – Biweekly
  o Enters course equivalencies directly on the transfer credit report page of the student information system. – daily

- UCC Review
  o pre-review for each meeting, again depends on volume, after meetings make necessary changes to rules. - monthly

3. What equipment and tools do you use in your job?
- Computer; Web and web based programs: College Source, Google Search, ASU Server Login, DARS, ACETS, Peoplesoft (>Campus Community>Organizations; >Records & Enrollment>Transfer Credit Evaluation, >Records & Enrollment>Transfer Credit Rules, >reporting tools, >People Tools); Web development software: Dreamweaver, Frontpage; Adobe Acrobat Pro; Snagit; MS Office Suite (mainly Access, Word, Excel, Outlook); Yahoo Messenger; AzTransfer Website

4. What knowledge and skills do you require to be successful in your job?
- Understanding of NAU Curriculum (past, present & future), Peoplesoft, AZ state regulations on transfer Articulation to build non-AzTransfer regulations, NAU Student advising practices.

5. What are the critical success factors for effective performance in your job?
- Communication with others with in my office and other offices on campus, academic and non, as well as Non-Az transfer institutions.

6. What are the main barriers to your success?
- The data that I pull is input by other offices on campus, if that information is incorrect I cannot create accurate transfer rules.

7. What are the most difficult aspects of your job?
- I must verify that each course I create a rule for has the correct prefix, number and data. This information is not always easy to locate in College Source, or on other institution web sites.

8. What should the training priorities for your job function be?
- NAU Curriculum procedures, Access, DARS, ACETS
- Previous training that helped (Office, Dreamweaver, FrontPage, PeopleSoft, SQL)

9. What knowledge do you require to perform your job successfully?
- NAU Curriculum, PS, DARS, Access, ACETS
10. What prior knowledge, skills and abilities, or attitudes did you bring to your position that helped to make you successful in your job?
   - Knowledge of NAU Curriculum
   - Access (all of the MS office suite)
   - Understanding of Student advising & records
   - Abilities: MultiTasking, Detail orientated,
   - Attitudes: Be creative in finding a solution that helps everyone, while working with in regulations.