



CASE STUDY

A streamlined process for course exceptions and transfers

How Purdue University Northwest simplified transfer equivalency for students and staff

Purdue University Northwest (PNW) is a metropolitan university in the Chicagoland area with two campuses located in Northwest Indiana. Serving a population of around 9,300 students, the institution has focused on strategies for improving student retention, increasing student engagement, and automating cumbersome manual processes.

Recently, PNW began to explore ways to connect its business processes and integrate its suite of enterprise solutions—including Ellucian Banner and Ellucian Degree Works—through the use of Ellucian Workflow and Ellucian Ethos. “Our vice chancellor of information services, Tim Winders, wanted the team to examine and research creative ways to address manual processes through the use of automation tools,” says Carol Coupet, executive director of enterprise applications services at the university.

One of the institution’s first initiatives was to streamline transfer course equivalencies. The project team consisted of employees from the registrar’s office, academic advising, and the Enterprise Applications Services (EAS) team.



PURDUE UNIVERSITY NORTHWEST

Primary challenge

Streamline transfer course equivalencies

Solutions

Ellucian Workflow

Ellucian Degree Works

Ellucian Ethos

Results

Standardized and automated complex manual exception processes

Cleared backlog of 4,500 exceptions

Improved student service with timely feedback

“Number one, we wanted to solve the issue of replacing the manual paper process that was used to process student exceptions called ‘bingo sheets,’” Coupet said. “Additionally, we wanted to standardize how exceptions were processed and approved across the institution. The amount of labor involved with the manual exception process, coupled with the lack of standardization across campus, hindered the institution’s ability to address its backlog of transfer equivalencies.”

Purdue University Northwest began looking at ways to automate and recognized the potential of using Ellucian Workflow and Ellucian Degree Works to assist with exception processing and approval routing.

Bringing everything together

PNW began the project by identifying the key obstacles to efficiency. The institution found that dozens of people could be involved in handling transfer equivalencies and exceptions, including students, advisors, and deans—and each individual might use a different process or pull information from a different system.

To eliminate this complexity, the institution undertook a process review and established best practices for exceptions, using Ellucian Workflow to keep lines of communication open and improve the productivity and efficiency of managing transfer course credit.

The university has now created a new and improved process for exceptions and routing approvals:

- 1 A student submits a petition for course exception to their advisor.
- 2 The advisor enters the request into the Ellucian Workflow system using a link in the Degree Works student worksheet.
- 3 If additional consideration from a dean or department chair is required, the petition is routed accordingly. An automated email then notifies all parties of any status change, and the updated approval status is added into Degree Works.

“Ellucian Workflow has made the process more seamless. We’ve been able to approve about 4,500 exceptions from a backlog,” says Coupet. “That helps with the transfer articulation process. We’re engaging students and giving them timely feedback and information.”

Coupet also notes that the new system has also cleared up potential areas of confusion, for both students and advisors.

“We’ve created a standardized process in which transfer courses are reviewed and approved consistently across the organization,” she says. “In the past, one advisor might say, ‘Yes, this class meets



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CAROL COUPET

Executive Director of Enterprise Applications, Purdue University Northwest

this course requirement,' while another advisor might say the opposite. So, we standardized that across the organization and improved communication and collaboration across those areas."

Planning for the future

PNW recently added a Change of Degree workflow, and is looking at other workflows including the Add, Drop or Swap workflow, software hardware requests, and onboarding and offboarding for employees.

With the institution's systems now integrated using Ethos, staff has improved visibility into students' needs, helping the university to plan accordingly. Now, Coupet says, "we can take the required courses for each student for the next semester and generate a report of the total number of courses that are needed for next semester. And we're beginning to plan out our course schedules based upon that information."

For other institutions considering deploying Ellucian Workflow to connect campus systems, Coupet recommends that they thoroughly understand data models, and notes that it's crucial to remain flexible.

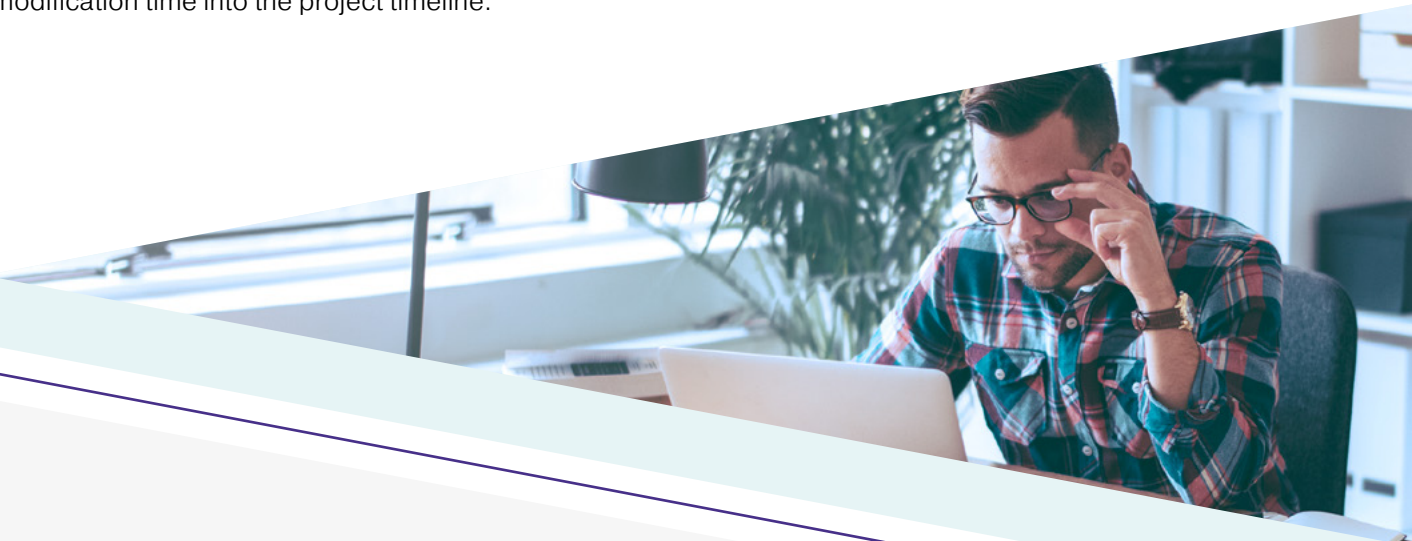
"Understanding the data models and the information you can and cannot get is extremely important," she says. "I think this can be an agile process, meaning code can be reused across workflows. However, you need to develop a plan, test the plan, and make modifications to the code as needed for project requirements. More importantly, you have to build that needed modification time into the project timeline."



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