



MISMO Implementation Framework – Case Study Part 1: Instructor-Guided Online Course

Welcome to the *MISMO Implementation Framework Case Study* instructor-guided online course!

The purpose of this document is to give you an overview of the course. Below you will find some essential information about the course to get you started.

Course Purpose

This hands-on instructor-guided online course is designed for business and technology professionals who are currently (or who may soon be) involved in the consideration, planning, and/or development of a MISMO-based project. The course provides an interactive case study of how to map data to the MISMO Reference Model. This includes creating the required conditionality and cardinality and leveraging them along with the data mapping to the MISMO Reference Model to create specifications for your developer. The case study will use a timely, real life example, to achieve course objectives by mapping from portions of the recently released CFPB Integrated Mortgage Disclosures Closing Disclosure form to the 3.3 Version of the MISMO Reference Model and creating the corresponding developer specifications. The course will also offer a review of many MISMO core principles including containers, data types, choice groups, cardinality and relationships.

Course Description

The course is presented in a blend of self-study and instructor-guided learning, all from the comfort of your own desk. The course includes live webinars, lasting two hours each, over four consecutive days. This will allow for participant interaction with the instructor and other industry experts. Course activities also include readings, homework activities, quizzes, and online discussions. Students who successfully complete the course will be issued a certificate of completion for their training transcript. *MISMO Fundamentals* is recommended as a prerequisite for students taking this course.

Topics include:

- Review of MISMO Core Principles
- Introduction to the MISMO Implementation Framework
- Overview of the CFPB Integrated Disclosure Closing Disclosure Form
- Key concepts and structured approach for data mapping
- How to create and populate a data mapping template
- Techniques for rationalizing data from multiple databases
- Drafting conditionality and cardinality statements
- Documenting critical information such as XPATH, data points, definitions, and enumerations
- Developing a technical specification for your development team
- Resources and tools available to assist in a MISMO implementation

Course Dates and Times

The webinars will take place from 1:00 PM – 3 PM ET on Tuesday, October 11 through Friday, October 14, 2016.



Instructors

Students will be guided through the course by the host, **Kelly Bradshaw, MBA.**

Lesson 1: Ralph Russo, Actualize Consulting

Lesson 2: Charlie Epperson, Signia Docs

Lesson 3: Heather Kerns, Actualize Consulting

Lesson 4: Steve Acker, Closergeist

Information about the course instructors can be found in the "Staff Information" area of the online course space.

For registration or technical issues, please contact MBA Education at (800) 793-6222 or email education@mba.org.

Course Objectives

By the end of this course, you will be able to:

- Apply MISMO Core Principles to your MISMO business analysis and mapping project
- Leverage the MISMO Implementation Framework
- Effectively map data to and from the MISMO Reference Model
- Create and populate a data mapping template
- Draft conditionality and cardinality statements
- Document critical information such as XPATH, data points, definitions, and enumerations
- Utilize new techniques for rationalizing data from multiple databases
- Prepare a technical specification that provides your developer with the information they need to build a solution that meets business objectives and is compliant with MISMO 3.x Version standards.

How It Works

To achieve a certificate of completion, participants are required to complete all course activities and participate actively in the four webinars. Students should plan to commit at least an hour between webinars to complete the assignments.

Course requirements include:

- Completing course exam with a score of 75% or higher
- Completing assigned homework

Course activities include reviewing reading materials and other online resources and participating in the online discussion board threads by the times/dates given.

Every student has the opportunity to:

- Send questions to the instructors at any time through the discussion boards



- Work with the other students directly, if desired

The instructor will:

- Lead the webinars
 - Review and respond to your questions
 - Review discussion board postings and provide individual feedback
 - Provide guidance for completing the assignments
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Course Schedule

The course officially begins on Tuesday, October 11th and ends on Friday, October 14th, 2016.

The course consists of four instructor-led 120-minute webinars on Tuesday, Wednesday, Thursday and Friday from 1:00 PM until 3:00 PM ET as well as online course activities to be completed between webinars.

Tuesday, Oct 11

Lesson 1

1 PM – 3PM ET

Wednesday, Oct 12

Lesson 2

1 PM – 3 PM ET

Thursday, Oct 13

Lesson 3

1 PM – 3 PM ET

Friday, Oct 14

Lesson 4

1 PM – 3 PM ET

Certificates will be emailed after the class for those attendees who successfully complete all course requirements.

Webinar Access Information

1. Go to: <http://mismo.adobeconnect.com/course2>
 2. Type your FIRST and LAST NAME under "Enter as a Guest" and press Enter. Please be sure to select the "Request Entry" button on the following page.
 3. Dial in to **1-800-768-2983**. Enter conference ID/Passcode **5572715**.
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Online Course Activities

Online course activities are available in the online course area. You should have received a separate email from MBA Education upon registration with login information for the online portion of the course.

Course resources, materials, and activities will be posted as the course progresses. Activities will include readings, virtual field trips, and discussion board assignments.

The instructors' goal is to get feedback to the student on Wednesday and Thursday evenings. Instructor feedback will be provided on the discussion board comments where needed.

Discussion Board

Participation in the discussion board assignments is required for successful completion of the course.

You should post at least one *new* comment thread in the forum, and you should reply to *at least* one other participant's post. Your discussion comments should be thoughtful and represent your opinion on the matter or on your company's best practices.

Technical Requirements

The four webinars run on Adobe Flash Version 9.0 or higher. Be sure to follow the instructions included in the email from **MBaEducation** to test your connection before Tuesday's call.

You will also need a phone connection for the audio in the webinars. We recommend using a land line and picking up your handset if using a speaker phone when you speak during the webinar calls.

Course Content Contributors

We would like to thank the generous contributors to this effort:

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