eTranscript California – Checklist for moving from Beta to Production

Functions detailed below should be performed on the Test Control Center and managed again during the transition into Production for eTranscript California system.

- **Transcript "Request" Download Manager:** Re-configure Download Slots on the live Control Center site. Apply all rules that were on the beta download slots onto the live download slots.

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- **Automate Transcript and Response Uploads:** Re-configured Upload Transcripts and Response Settings on the live Control Center site. Upload settings need to be recreated if you want to use the Xap Communicator for uploading transcripts.

- **Upload Requests:** Re-configured Upload Settings on the live Control Center site. Upload settings need to be recreated if you want to use the Xap Communicator for uploading transcripts.

- **Custom Export & Print Projects:** All export/print projects created on the beta site will automatically appear on the live site. To make them operational on live, all you have to do is edit the project and regenerate it on the live control center site.

- **Fulfillment Workflow Emails:** Emails content will not copy over. You need to manually copy the text of each of them into the live control center site from beta. You will also need to active and inactivate each message as set up on the beta site. Apply any email filters that were on beta emails to the live emails.

- **Rules / Filters:** All rules created on beta will be on the live site. You don't need to do anything. It is recommended that the "test" rules be deleted from your live system.

- **Account Management and Accounts:** All users' accounts will work on the live control center site. All accounts on beta will appear on live.

- **Fulfillment Workflow:** The Fulfillment Workflow "tasks" will not be copied from Beta to Live. The Student email task will default for Live but will be set to Inactive and need to be set to inactive to prevent distribution of emails before you're ready.

- **Transcript Preferences:** All Preferences must be reviewed and recreated in Live as necessary. Expiration settings are part of Preferences. Therefore, they must be set up on live.

- **Xap Communicator:** In the Preference tab, change the Xap Server from beta to live.

- **Transcript Download Slot Emails:** For colleges just going live, it's a good idea to activate the email notification option available on the transcript download slots. This will ensure that the slot owner will be notified when transcripts are received and NOT downloaded within a set amount of time. Thus preventing new incoming transcripts from being overlooked. See eTranscript Implementation Guide for details.

- **Transcript Download Slot Filters:** Setting up there download filters is an excellent method for colleges to accept data (TS130 or XML) from some colleges while only having the ability to process PDF from other colleges. Once a college appears on the Live Control Center any other subscribers can send you transcripts. This will help you process them. See eTranscript Implementation Guide for details.