eTranscript California procedure – email notification for received transcripts

In eTranscript California, if a college is listed on the 'production' Xap Control Center, then other colleges see them as being ready to accept transcripts. When colleges new to eTranscript California have not yet set up automated processes to receive electronic transcripts into their internal systems, they sometimes may be unaware that other eTranscript California colleges are sending electronic transcripts to them. Even if a college is not ready to accept incoming transcripts into their student information system, they can still benefit by receiving the transcript to view online, print, and process manually. And most importantly, this ensures that student transcripts receive the prompt attention they deserve.

One way for a college to make sure received transcripts do not go unnoticed is to use the automated email function associated with transcript downloading. This function sends an email notification if a transcript has been received but not downloaded within a user-selected period of time.

The basic steps involved in this solution are:

- A. Log into the Control Center using the account of the person who will be receiving the email notification of transcripts received.
- B. Using the Download Manager (menu path Transcripts → Download College Transcripts), set up an eTranscript California transcript download slot to download transcript files in the desired format (PDF, EDI, or XML). Typically, you will want to select the PDF format unless you have software to process XML or EDI transcripts.
- C. When configuring the transcript download slot, select the option to send an email when a received transcript has not been downloaded, and select the period of time after receipt of the transcript when the email will be sent.

When an email notification of a received transcript arrives, there are two basic approaches that can be employed for retrieving and processing the transcript:

- Using the Transcripts We've Received Report in the Control Center, you can view and print transcripts online to process them manually.
- You can retrieve the downloaded file and print or process it as appropriate.

Implementation Steps for Email Notification

The user performing these steps must have been granted the ability to download college transcripts via the Account Manager. (See your eTranscript California administrator for help if you need to be granted this ability.) The email address that is used for notification of received transcripts is the email address associated with the user account signed in during these steps.

1. Log into the Control Center. Then, from the Transcripts drop-down menu, select "Download College Transcripts" as shown in *Figure D-1*.

Home	Transcripts	Application Processing	g Reports	Preference	es Help		
Request College Transcripts		- 1					
Fulfill College Transcript Requests		~~ ` `					
1	Download College Transcripts				10		
1 yes	Download High School Transcripts		Control Center				
Data M	Reports		Ferm Statu:	s			
	Un Preferences About CCCTran			Term		Status	Notes
Un			Fall 2009			OPEN	
			Fall 2010			OPEN	
Help		Spring 2010			OPEN		
Control Center Tour		Calendar					

Figure D-1. Transcripts Drop-Down Menu

2. If the resulting screen is like the one shown in *Figure D-2*, then there are no download slots allocated to this account, and you will need to allocate one. Otherwise, skip to step 3.

Home	Transcripts	Application Processing	Reports	Preferences	Help
Tra Web [nscrip				
The Download Manager is currently not configured for this account. If you wish to enable web-based or automated Export file download you must <u>configure your download slots</u> in the Download Manager and select an Export Wizard or Print Wizard project.					

Figure D-2. Web Download Screen (No Slots Allocated)

- a. In the screen shown in *Figure D-2*, click on the link, "configure your download slots". This will result in the screen shown in *Figure D-3*.
- b. Click on "Slot Allocation" in the left column to display the Download Slot Allocation screen (*Figure D-4*).
- c. Click on one of the open slots, the select the account holder's name from the Download Menu.
- d. Click on the "update" button at the bottom of the screen. This will display the College Download Slot Settings screen like the one shown in *Figure D-6*. Go to step 4.

Transcripts	wnload Settings Mark/Unmark Records Automate Download
<u>Slot Allocation</u> Format Configuration	College Download Slot Settings Your Download Slots
	You currently have no download slots assigned to you. Each application is allocated 30 distinct download slots for logging purposes. The number of slots assigned to each user is controlled by a campus representative with download administration privileges. Please <u>click here</u> if you require further assistance.

Figure D-3. College Download Setting Screen (No Slots Allocated)

Download Settings Mark/Unmark Records Automate Download					
Slot Allocation	Download Slot Allocation				
Format Configuration Default Viewer	Slots				
Delaurenonen	1.* Open Slot	16. Open Slot			
	2. Open Slot	17. Open Slot			
	3. Open Slot	18. Open Slot			
	4. Open Slot	19. Open Slot			
	5. Open Slot	20. Open Slot			
	6. Open Slot	21. Open Slot			
	7. Open Slot	22. Open Slot			
	8. Open Slot	23. Open Slot			
	9. Open Slot	24. Open Slot			
	10. Open Slot	25. Open Slot			
	11. Open Slot	26. Open Slot			
	12. Open Slot	27. Open Slot			
	13. Open Slot	28. Open Slot			
	14. Open Slot	29. Open Slot			
	15. Open Slot	30. Burt, Hong			
* Slot 1 is the primary download slot. The date and time at which download bate" in the list files, transcript managers, and		e and time at which downloading from Slot 1 , transcript managers, and other user records.			
	(up	date			



3. If the screen that results from step 1 is like the one shown in *Figure D-5*, then there is at least one download slot allocated to this account.



Figure D-5. Web Download Screen (Slots Allocated)

- a. Click on the link, "Click here to configure downloads with the College Download Manager". This will display the College Download Slot Settings screen like the one shown in *Figure D-6*.
- b. If you want to add a new slot rather than add email notification on an existing slot, follow the procedure in steps 2.b to 2.d.
- 4. The College Download Slot Settings screen (*Figure D-6*) lists the slots assigned to your account, and identifies the download 'project' assigned to the slot. Click on "edit settings" for the download slot you want to use for email notification.

Transcripts	vnload Settings Mark/Unmark Records Automate Download	add page to My Quicklinks get help for this page ad
Slot Allocation	College Download Slot Settings	
Format Configuration	Your Download Slots	
	Slot 17: Project Not Assigned	edit settings
	Slot 20: College Transcript TS130	edit settings
	Slot 21: College Transcript CCC XML	edit settings
	Slot 28: Debugging Purposes Only - CCCASCII	edit settings

Figure D-6. College Download Setting Screen (Slots Allocated)

- a. If you have selected a slot *not* labeled "Project Not Assigned", the main Edit College Download Slot Settings screen (*Figure D-8*) will be displayed. Go to step 5.
- b. If you have selected a slot labeled "Project Not Assigned", choose a "Pre-generated" project from the list shown in *Figure D-7*. For a slot whose prime purpose is email notification, one of the College Transcript View projects is recommended.

Transcripts			(+) add pr (*) get he	age to My Quicklinks Ip for this page
Down	nload	Settings Mark/Unmark Records	Automate Download	
Slot Allocation	Edit	College Slot Download Settings	•	
r onnac conliquiation	Slot 22 Download Settings			
	Pre-generated College Transcript			
	Available Projects			
		Project Name	Date Created	Date Last Modified
	\circ	College Transcript CCC XML	10/6/2005 5:24:00 PM	
	\circ	College Transcript TS130	10/24/2005 11:08:00 AM	
	\circ	College Transcript View: Brief	10/14/2005 1:47:00 PM	
	0	College Transcript View: Full	2/24/2006 5:00:00 PM	
	\circ	College Transcript View: Gen Ed	2/7/2006 4:02:00 PM	
	0	Debugging Purposes Only - CCCASCII	10/24/2005 11:06:00 AM	
		Cal	ncel	

Figure D-7. Edit College Slot Download Setting Screen: Choosing a Project

Transcripts	4	 add page to My Quicklinks get help for this page 				
Down	Download Settings Mark/Unmark Records Automate Download					
Slot Allocation	Edit College Slot Download Settings					
Format Configuration	Slot 22 Download Settings					
	Setting name:	College Transcript View: Full				
	Current download format: (project is pre-generated)	College Transcript View: Full				
	Downloaded file format:	PDF 💌				
	Download Filter:	None 💌 👂				
	Remind me by e-mail when new transcripts arrive:	Yes C No				
	New transcript reminder schedule:	Daily				
	File name pattern for files that contain information for a specifically chosen student:	Xap_Download .pdf				
	File name pattern for files that contain information for multiple students:	Xap_Download				
	Number of transcripts per file:	999 (max download 9999)				
	0	save cancel				

Figure D-8. Edit College Download Setting Screen

- 5. Use the Edit College Slot Download Setting screen to configure the slot. *Figure 2-8* shows recommended settings.
 - a. The critical settings for enabling email notification of new transcripts are:
 - "Remind me by e-mail when new transcripts arrive" = "Yes"
 - "New transcript reminder schedule" = "Daily" (or any other option except "Never")
 - b. Other settings can be modified as desired.
 - c. Click "save" at the bottom of the page to finalize the slot configuration. This completes the setup for email notification of new transcripts.

July 2011

Responding to Email Notification

Figure D-9 shows a typical transcript notification email. The content and format of this notification are not user-definable.

80p	THE CONTROL CENTER	
Applica	tion Processing	
Dear Stephanie	,	
This is an autom	patic reminder to notify you that there	a are submitted college

This is an automatic reminder to notify you that there are submitted college transcripts which have not yet been downloaded.

To retrieve them, simply go to the Xap <u>Control Center</u> site at <u>http://control.xap.com</u>

Currently, you have the following submitted college transcripts(s) that have not been downloaded within the configured reminder period.

College Transcripts	Number of College Transcripts
El Camino College (Slot 27) 63

You received this email because you have been designated as the contact for the download reminder. You may configure your reminder interval and other information on the <u>Control Center</u> site.

If you have questions on how to retrieve the college transcripts(s) or need assistance logging on, please feel free to contact me by e-mail at <u>ceene@xap.com</u> or by telephone at (310) 842-9800 x309.

Your Client Services Manager,

Ceene Randle

Figure D-9. Typical Transcript Notification Email

You will continue to receive this email daily (or as otherwise scheduled) until you download the transcripts via the slot identified in the email. Therefore, even in you use the Transcripts We've Received Report to view and print transcripts, you must perform the following steps to clear the slot and prevent repeated emails for the same transcripts.

- 1. When you receive an transcript notification email, log into the Control Center. Then, from the Transcripts drop-down menu, select "Download College Transcripts" (as shown in *Figure D-1*).
- 2. On the Web Download screen (*Figure D-10*), select the slot used for email notification. Then click on the "next" button.

Transcript	s				
Web Download					
Click here to configure	e downloads with the College Download Manager.				
Select download project:	Slot 17. College Transcript View: Full				

Figure D-10. Web Download Screen

3. On the College Transcript Batch Download screen (*Figure D-11*), click on the "download" button to initiate download of the new transcripts. Continue as prompted. (Download procedures will vary.)

Transci	ripts	et help for th
College Tran	script Batch Download	
	Slot 17 Student File Download Option	s
	3 new transcripts available:	download
	Download in date range:	from:
	(May include records that have already been marked as downloaded)	to: (mm/dd/yyyy hh:mm AM/PM, time optional)
	Get single student information:	SSN (### #####)
	Get single student information:	Request confirmation number
	Download from list:	show list

Figure D-11. College Transcript Batch Download Screen

4. Process the PDF transcripts according to your college's procedures.