

Getting the Most out of eTranscript California

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- Palomar College – Jeri Richards
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Getting the Most out of eTranscript California

- How are Colleges using eTranscriptCA
 - CSU Long Beach
 - Palomar College
 - Fullerton College
- Control Center Tips and Features
 - Working with Online Help
 - Reports – Create new Views & Rules
 - Fulfillment Workflow - Automated Emails



CSU Long Beach

- Requesting transcripts electronically
- Downloading transcripts
- Dealing with requests on hold
- Importing into CSU LB systems
- Paper versus Electronic Transcripts



Palomar College

- Palomar processing student transcript requests:
 - Counter requests, and
 - Requests from Credential Solutions as a portal for student requests
 - Credentials' programs build the transcript file from SIS data and delivers the transcript to the recipient college via eTranscriptCA or SPEEDE
- Xap Communicator is used for Transcript export and import



Palomar College

- Palomar includes GE and IGETC certification within the outgoing transcripts



PALOMAR CUSTOM PEOPLESOFT PAGES FOR ENTRY OF CSU GE AND IGETC INFORMATION EXAMPLE 1 (GE AND IGETC FULLY MET)

CSU Note

CSU General Education Requirements

Communication/Critical Thinking [A]:

Physical Universe/Life Forms [B]:

Arts/Lit./Phil./Foreign Lang [C]:

Social Institutions/Behavior [D]:

Lifelong Understanding [E]:

General Education Units as of: :

American Institutions Requirement

US History:

US Constitution/Gov't:

California Government:

[Create CSU Gen Note](#)

CSU GENERAL EDUCATION REQUIREMENTS-----AMERICAN INSTITUTIONS REQUIREMENT

Comm/Critical Thinking.....A CERTIFIED. . US History..... MET

Phys. Universe/Life Forms...B CERTIFIED. . US Constitution/Gov't... MET

Arts/Lit.Phil./For. Lang....C CERTIFIED. . California Government... MET


Social Inst/Behavior.....D CERTIFIED

Lifelong Understanding.....E CERTIFIED

General Education Units as of 2009-02-03: 41

[Save](#) [Return to Search](#)

IGETC CSU Cert: 01/26/2009 

IGETC UC Cert: 01/26/2009 

American Institutions Requirement

US History: Met ▼

US Constitution/Gov't: Met ▼

California Government: Met ▼

Create IGETC Note

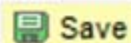
.INTERSEGMENTAL GENERAL EDUCATION TRANSFER CURRICULUM

IGETC GENERAL EDUCATION REQUIREMENTSAMERICAN INSTITUTIONS REQUIREMENT

CSU System Certification Completed: 2009-01-26. US History..... MET

.UC System Certification Completed: 2009-01-26. US Constitution/Gov't... MET

. California Government... MET



Save



Return to Search

RESULTING CERTIFICATION GRID ON ELECTRONIC TRANSCRIPT

EXAMPLE 1 (GE AND IGETC FULLY MET)

	T	Attempt units	Earned units	Grade points	GPA
Associate in Arts Degree awarded 12/20/2008					
TYPE: AA MAJOR: General Studies - Arts and Humanities					
	S				
Associate in Arts Degree awarded 12/20/2008					
TYPE: AA MAJOR: Liberal Arts and Sciences					
	S				

GENERAL EDUCATION CERTIFICATION

CSU GE Completed 02/03/2009			CSU IGETC Completed 01/26/2009			UC IGETC Completed 01/26/2009		
Area A	Y	02/03/2009	Area 1	Y	01/26/2009	Area 1	Y	01/26/2009
Area B	Y	02/03/2009	Area 2	Y	01/26/2009	Area 2	Y	01/26/2009
Area C	Y	02/03/2009	Area 3	Y	01/26/2009	Area 3	Y	01/26/2009
Area D	Y	02/03/2009	Area 4	Y	01/26/2009	Area 4	Y	01/26/2009
Area E	Y	02/03/2009	Area 5	Y	01/26/2009	Area 5	Y	01/26/2009
Amer Hist & Inst	Y	02/03/2009				Area 6	Y	01/26/2009

Y = Certified completed; N = Not completed; P = Completed with pass-along credit from another institution

2005 FALL Semester 08/22/2005 - 12/17/2005

Course ID	Course Title	<u>Rpt</u>	<u>Actn</u>	<u>Cred</u>	<u>Hon</u>	<u>I</u>	Course units	Earned units	Grade points	<u>Grade</u>
CINE 100	ART OF THE CINEMA					S	3.00	3.00	6.00	C

GRADE SCALE CODE: 025

PALOMAR CUSTOM PEOPLESOFT PAGES FOR ENTRY OF CSU GE AND IGETC INFORMATION EXAMPLE 2 (GE PARTIALLY MET/NO IGETC)

CSU Note

CSU General Education Requirements


Communication/Critical Thinking [A]:

Physical Universe/Life Forms [B]:

Arts/Lit./Phil./Foreign Lang [C]:

Social Institutions/Behavior [D]:

Lifelong Understanding [E]:

General Education Units as of:  :

American Institutions Requirement

US History:

US Constitution/Gov't:

California Government:

[Create CSU Gen Note](#)

CSU GENERAL EDUCATION REQUIREMENTS-----AMERICAN INSTITUTIONS REQUIREMENT

Comm/Critical Thinking.....A NOT MET . . US History..... MET

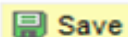
Phys. Universe/Life Forms...B NOT MET . . US Constitution/Gov't... MET

Arts/Lit.Phil./For. Lang....C CERTIFIED. . California Government... MET

Social Inst/Behavior.....D CERTIFIED

Lifelong Understanding.....E CERTIFIED

General Education Units as of 2010-01-29: 34



Save



Return to Search

IGETC CSU Cert:

 31

IGETC UC Cert:

 31


American Institutions Requirement


US History:

US Constitution/Gov't:

California Government:

Create IGETC Note

 Save

 Return to Search

RESULTING CERTIFICATION GRID ON ELECTRONIC TRANSCRIPT

EXAMPLE 2 (GE PARTIALLY MET/NO IGETC)

T Attempt units Earned units Grade points GPA

Associate in Arts Degree awarded 12/19/2009

TYPE: AA MAJOR: General Studies - Social/Behavioral Sci

S

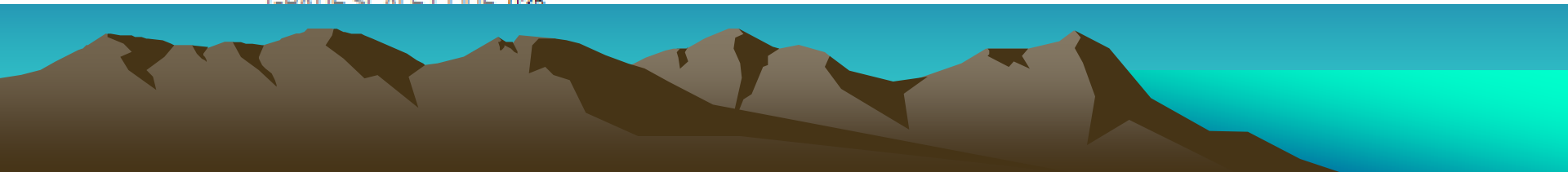
GENERAL EDUCATION CERTIFICATION

CSU GE			CSU IGETC			UC IGETC		
Area A	N							
Area B	N							
Area C	Y	01/29/2010						
Area D	Y	01/29/2010						
Area E	Y	01/29/2010						
Amer Hist & Inst	Y	01/29/2010						

Y = Certified completed; N = Not completed; P = Completed with pass-along credit from another institution

2006 FALL Semester 08/21/2006 - 12/16/2006

Course ID	Course Title	<u>Rpt</u>	<u>Actn</u>	<u>Cred</u>	<u>Hon</u>	<u>I</u>	Course units	Earned units	Grade points	<u>Grade</u>
MATH 15	PREALGEBRA					S	3.00	3.00	12.00	A
GRADE SCALE CODE: 025										



Palomar College

- Future Plans
 - import incoming student transcript data into internal systems



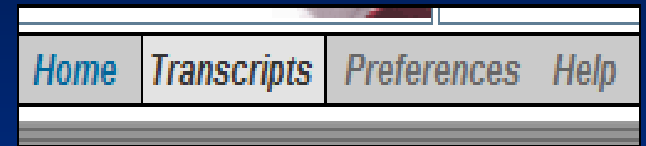
Fullerton College

- Automated transcript request fulfillment
- Student Portal transcript requests
- Fulfillment Workflow Emails
- Managing or cancelling requests on Hold



Online Help

- Online Help Menu Item



- Select Help Topics
- Select Transcripts from Content List
- Select Video Tutorials or Search for Help
- Download PDF Documents

Transcript Menu

- Request College Transcripts
- Fulfill College Transcript Requests
- Download College Transcripts
- Download High School Transcripts
- Account Manager
- **Reports**
- Preferences
- About eTranscriptCA

Reports – Custom Views & Rules

DetailSummary




Recipient School Options

View using: Recipient School

From: 4/1/2009 to: 4/30/2011 Rule: All Recipients except CSUS Results: 100


Search for: leave empty for all records

Recipient School ([Open in Excel](#))

View Activity	Status	Response Status	Last Name	First Name	Date Requested	Requested By	Recipient Institute
	Transcript Delivered		Graziadei	Linda	04/01/2009	National University	National University
	Transcript Expired	HO	Marks	Janelle	04/01/2009	National University	National University
	Transcript Expired		Graziadei	Linda	04/06/2009	National University	National University



Rules Wizard

From: 4/1/2011 to: 4/30/2011 Rule: All Recipients except CSUS  delete

Search for: leave empty for all records

STEP 1 [Rule Settings](#)

STEP 2 [Workspace](#)




STEP 3 Construct Rule

Construct Rule Logic

Rules Wizard Statement for 'All Recipients except CSUS'

Recipient Institution Name DOES NOT EQUAL {CSU Sacramento}

Rules Wizard Toolbox

{	Recipient Institution Name	EQUALS DOES NOT EQUAL GREATER THAN GREATER THAN OR EQUAL TO LESS THAN LESS THAN OR EQUAL TO CONTAINS	Blank Enter Value Enter List Select Field Enter Parameters	Recipient Institution Name	AND OR AND NOT	 undo  clear  save
---	----------------------------	--	--	----------------------------	----------------------	---

Transcript Menu

- Request College Transcripts
- Fulfill College Transcript Requests
- Download College Transcripts
- Download High School Transcripts
- Account Manager
- Reports
- **Preferences**
- About eTranscriptCA

Fulfillment Workflow - Emails

Transcripts

[Institution Information](#)

[Request Processing](#)

[Transcripts](#)

[Fulfillment Workflow](#)

[add page to my quicklinks](#)

[get help for this page](#)

Fulfillment Workflow

Fulfillment Workflow

Automatic Request Approval

☒ Automatically approve all received transcript requests

[update](#)

Automated Emails

Select a workflow step and click edit to configure automated email for that step.

- | | | | | |
|----------------------------------|------------------------------|----------------------------|-----------------------------|---|
| <input type="radio"/> | Transcript Request Submitted | | | |
| <input type="radio"/> | <input type="checkbox"/> | Approve Transcript Request | | |
| <input type="radio"/> | <input type="checkbox"/> | <input type="checkbox"/> | Download Transcript Request | |
| <input checked="" type="radio"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Upload Transcript/Response |
| <input type="radio"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Release Transcript to Recipient Institution |
| <input type="radio"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Transcript Delivered |

[edit](#)

Email Tasks

Transcript Stage Change Action

Current Tasks

	Task	Active	Rule	On Success	Order
<input type="radio"/>	Transcript Institution Notification E-Mail.	No	Original Request On FN Hold	Continue	▲ ▼
<input type="radio"/>	Requesting Institution Notification E-Mail.	No	Original Request On FN Hold	Continue	▲ ▼
<input type="radio"/>	Recipient Notification E-Mail.	No	Original Request On FN Hold	Continue	▲ ▼
<input type="radio"/>	Custom Notification E-Mail For Anybody.	No	Original Request On FN Hold	Continue	▲ ▼
<input type="radio"/>	Custom Notification E-Mail For Anybody.	Yes	Offline Record Search	Continue	▲ ▼
<input type="button" value="edit"/> <input type="button" value="copy"/> <input type="button" value="delete"/>					

Add New Task

	Task	Task Description
<input type="radio"/>	Student Confirmation E-Mail.	Send confirmation email to the student.
<input type="radio"/>	Transcript Institution Notification E-Mail.	Send confirmation email to the Transcript Institution.
<input type="radio"/>	Requesting Institution Notification E-Mail.	Send confirmation email to the Requesting Institution.
<input type="radio"/>	Recipient Notification E-Mail.	Send confirmation email to the Recipient Institution.
<input type="radio"/>	Custom Notification E-Mail For Anybody.	Send confirmation email to anybody you want.

Fulfillment Workflow - Upload Transcript/Response	
Transcript Institution Notification E-Mail.	
Transcript Institution Notification E-Mail.	
This module is:	<input type="radio"/> Active <input checked="" type="radio"/> Inactive
If task is successful:	<input checked="" type="radio"/> Move on to next task <input type="radio"/> Do not execute any more tasks
Rule:	Original Request On FN Hold
Variable Workspace:	Transcript Transaction Info
From Name	SCC Transcripts
From Email	scctranscripts@scc.losrios.edu
Email Subject	CCCTran Request On Hold-Trans
Text Message	
<pre>eTranscriptCA TRANSCRIPT REQUEST ON HOLD The request for the following student's transcript has been placed on hold due to financial holds on the student's record: Student First Name: [Student First Name] Student Last Name: [Student Last Name]</pre>	

Questions?

