eTranscript California

Electronic Transcript Exchange

Fullerton College Workshop
April 19th 2011

Today's Agenda

This session provides an demo of the eTranscriptCA workflow from Transcript Request through Delivery

- eTranscriptCA Demo
- Implementation
- Q&A

Session Includes

Requesting Transcripts
- Single (user interactive)
- Batch
- Bulk

Request Holds

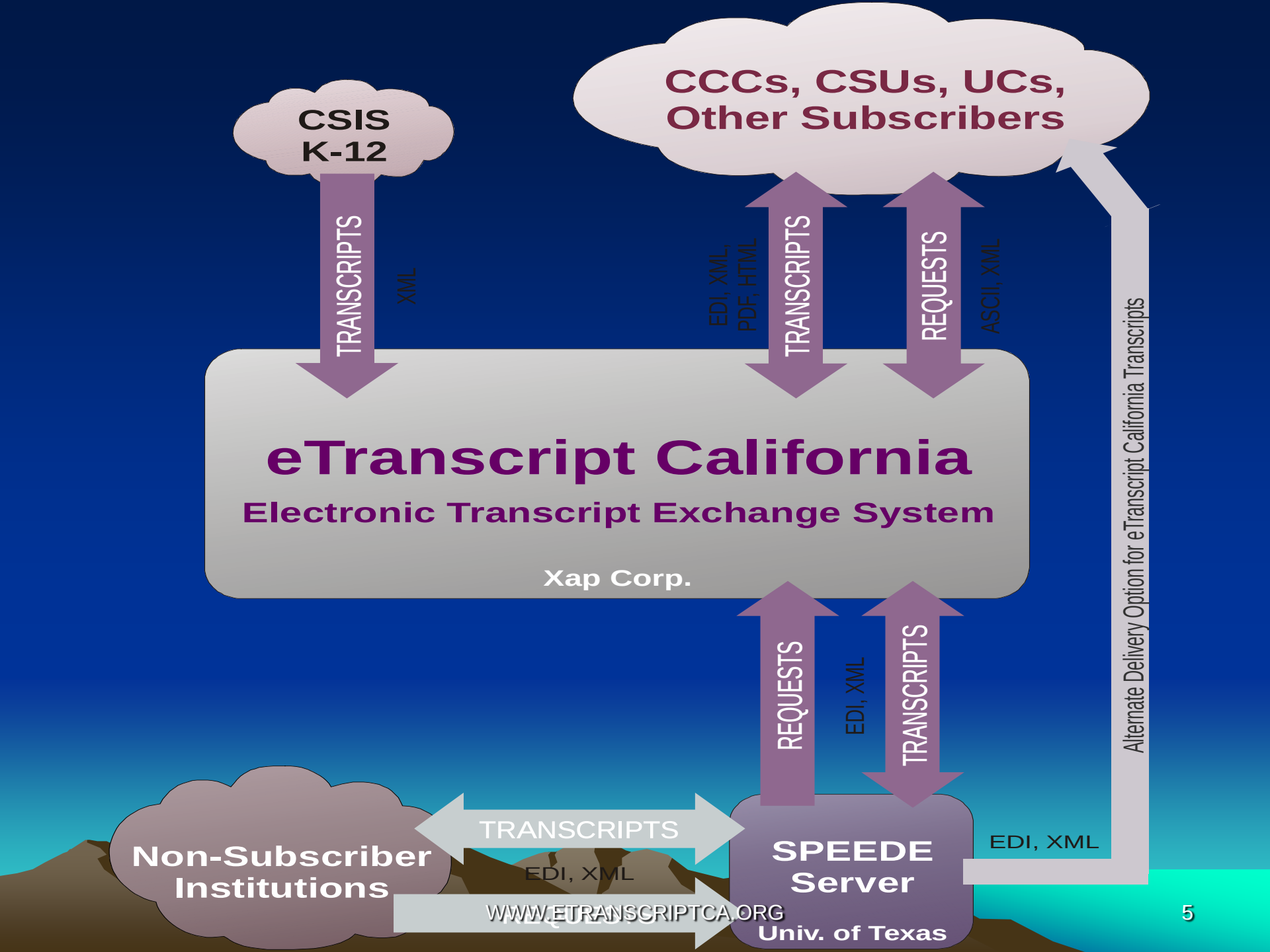
Fulfilling Transcripts
- Download Requests
- Uploading Transcripts
- Messaging

Hold Processing

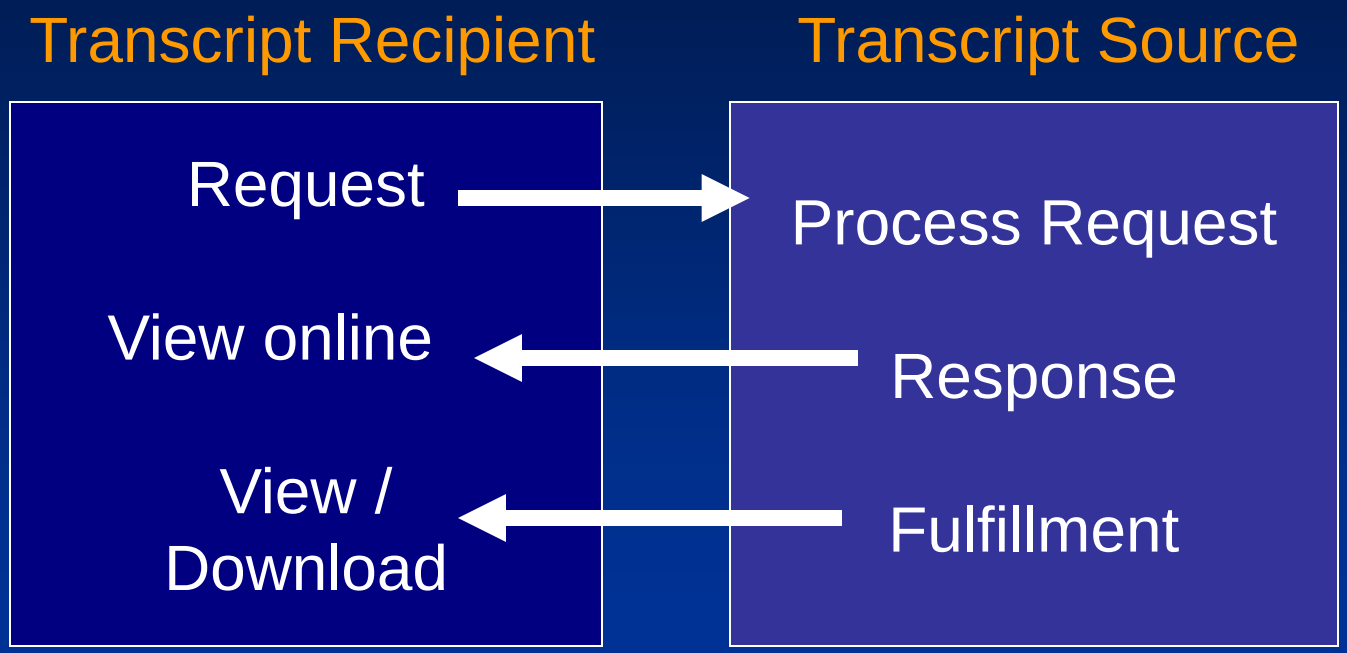
Receiving Transcripts
- Viewing, Printing
- Standard Views
- Downloading
- Standard Data Formats
- SPEEDE Server

Administering Transcripts
- Request & Submission Reports
- Transaction Event History
- Account Management
- Workflow Preferences
- Email Communication
- Fee & waiver rules
- Control & expiration
- Institution setup

General Information

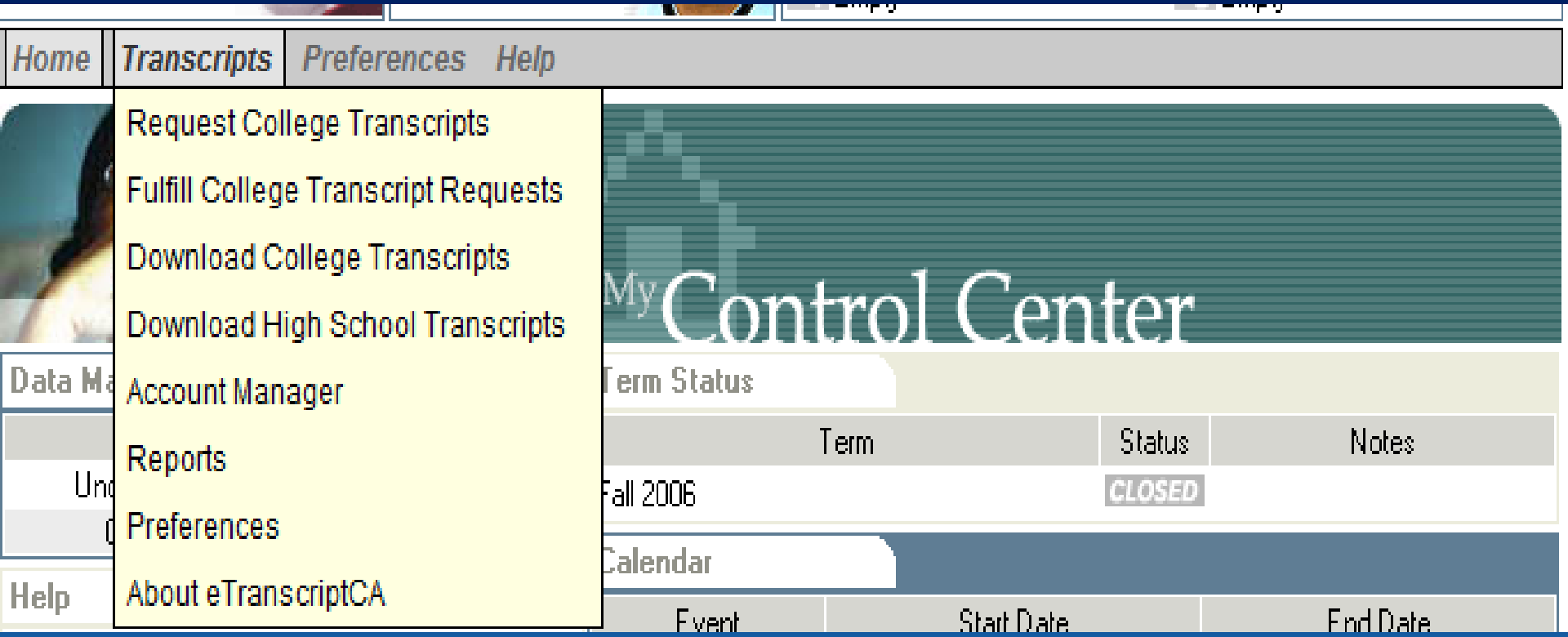

CCCs, CSUs, UCs,
Other Subscribers
CSIS
K-12
TRANSCRIPTS
XML
EDI, XML,
PDF, HTML
TRANSCRIPTS
REQUESTS
ASCII, XML
Alternate Delivery Option for eTranscript California Transcripts
eTranscript California
Electronic Transcript Exchange System
Xap Corp.
REQUESTS
EDI, XML
TRANSCRIPTS
TRANSCRIPTS
EDI, XML
REQUESTS
Non-Subscriber
Institutions
SPEEDE
Server
EDI, XML
Univ. of Texas

Major Functionality

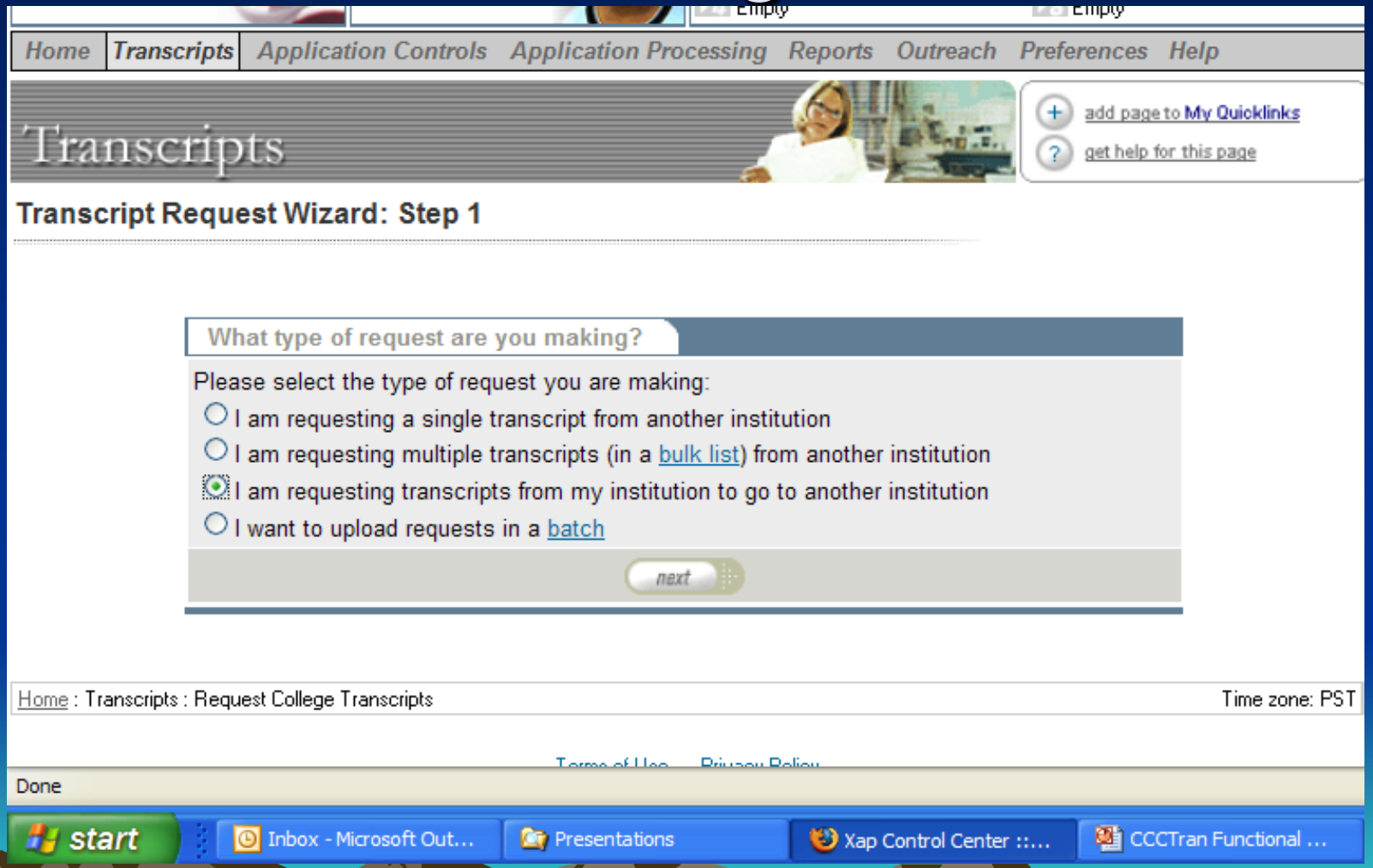


- Setup for either Manual or Automated processing
- Support for national standards – XML & EDI
- Common eTranscript California Data Dictionary (ASCII based)
- Automated email messaging (optional setup)
- Standardized transcript layout (online or printed)

Transcript Options

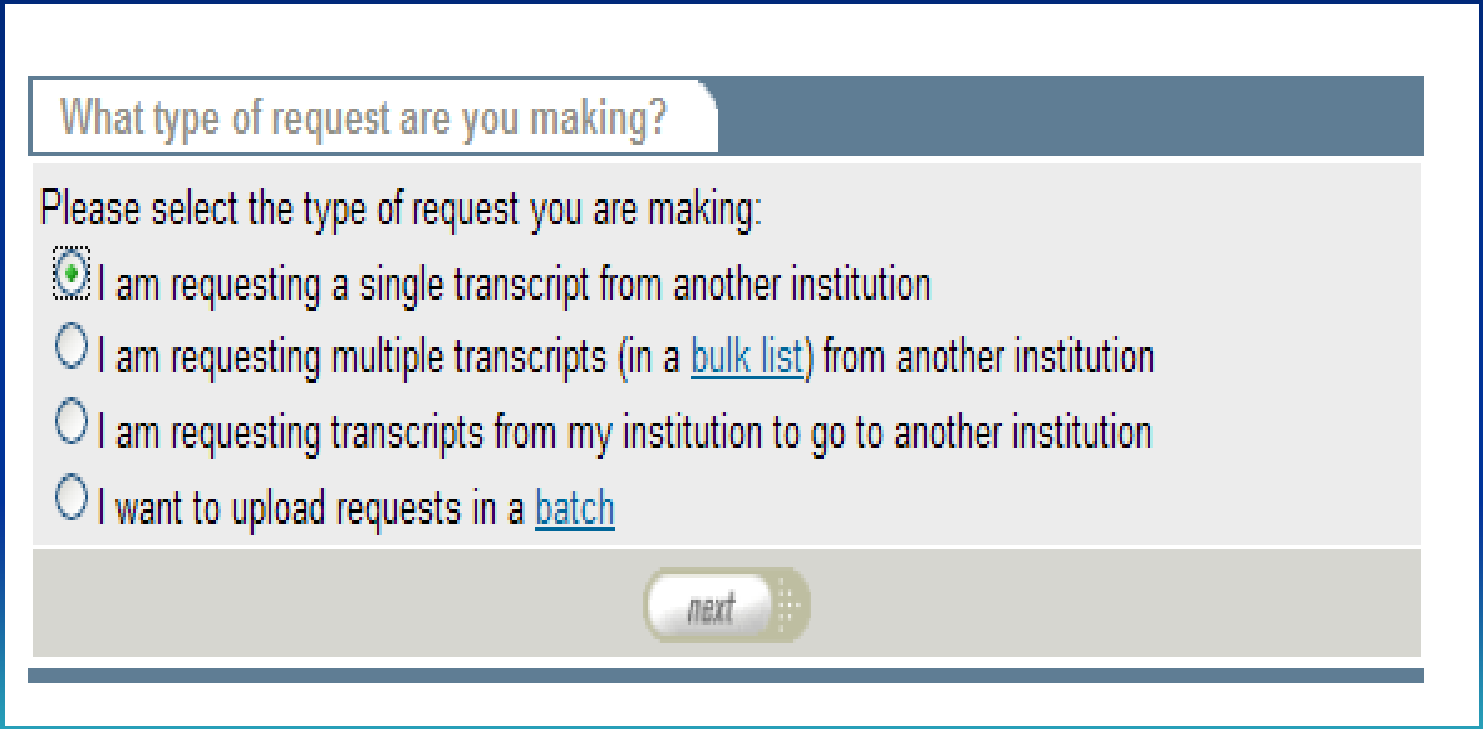


Push Transcript from my college to another college - Demo



Demo – Request Transcript from my college to another

Request Transcript from another College - Demo

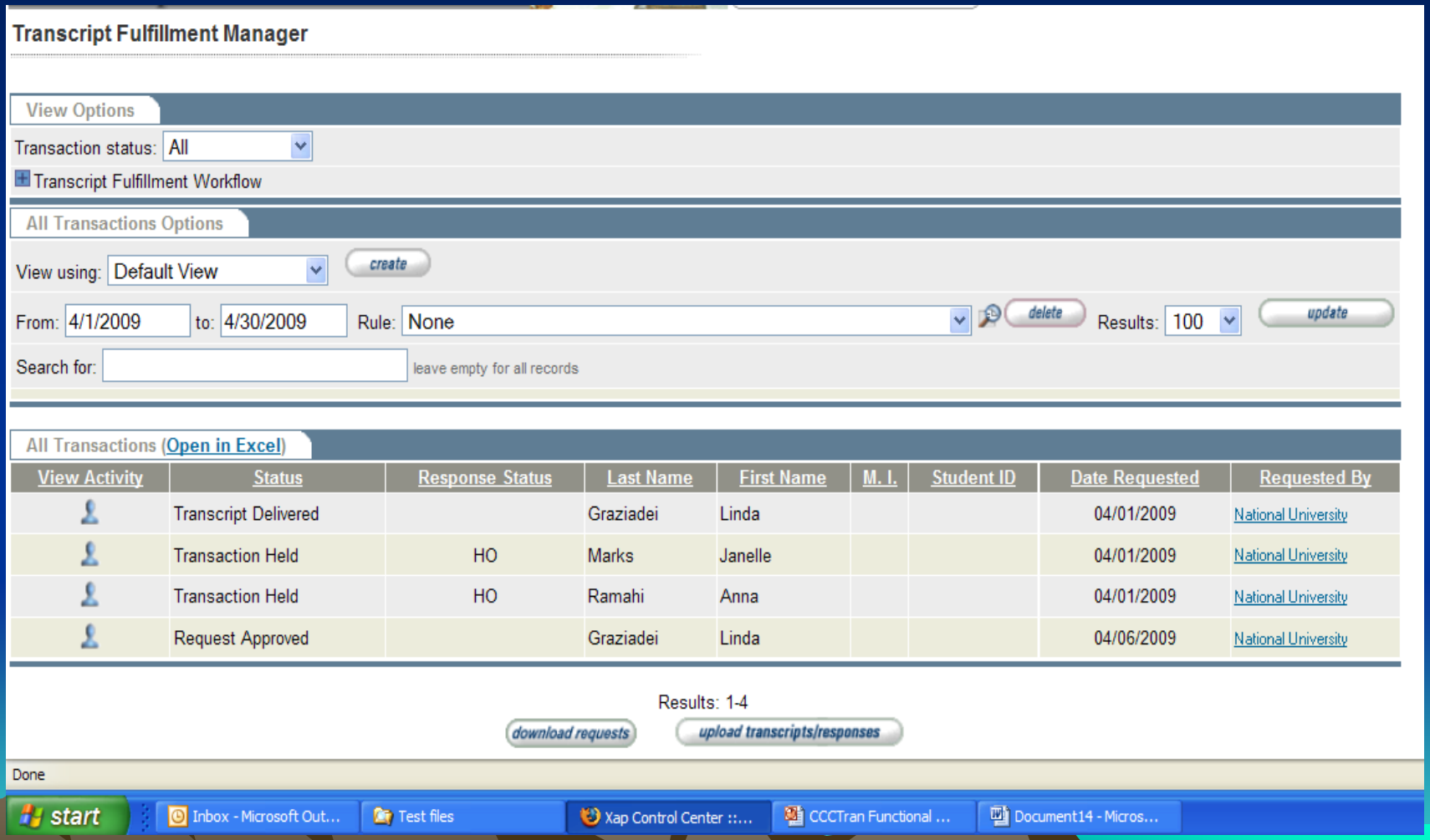


Demo – Requesting from another college

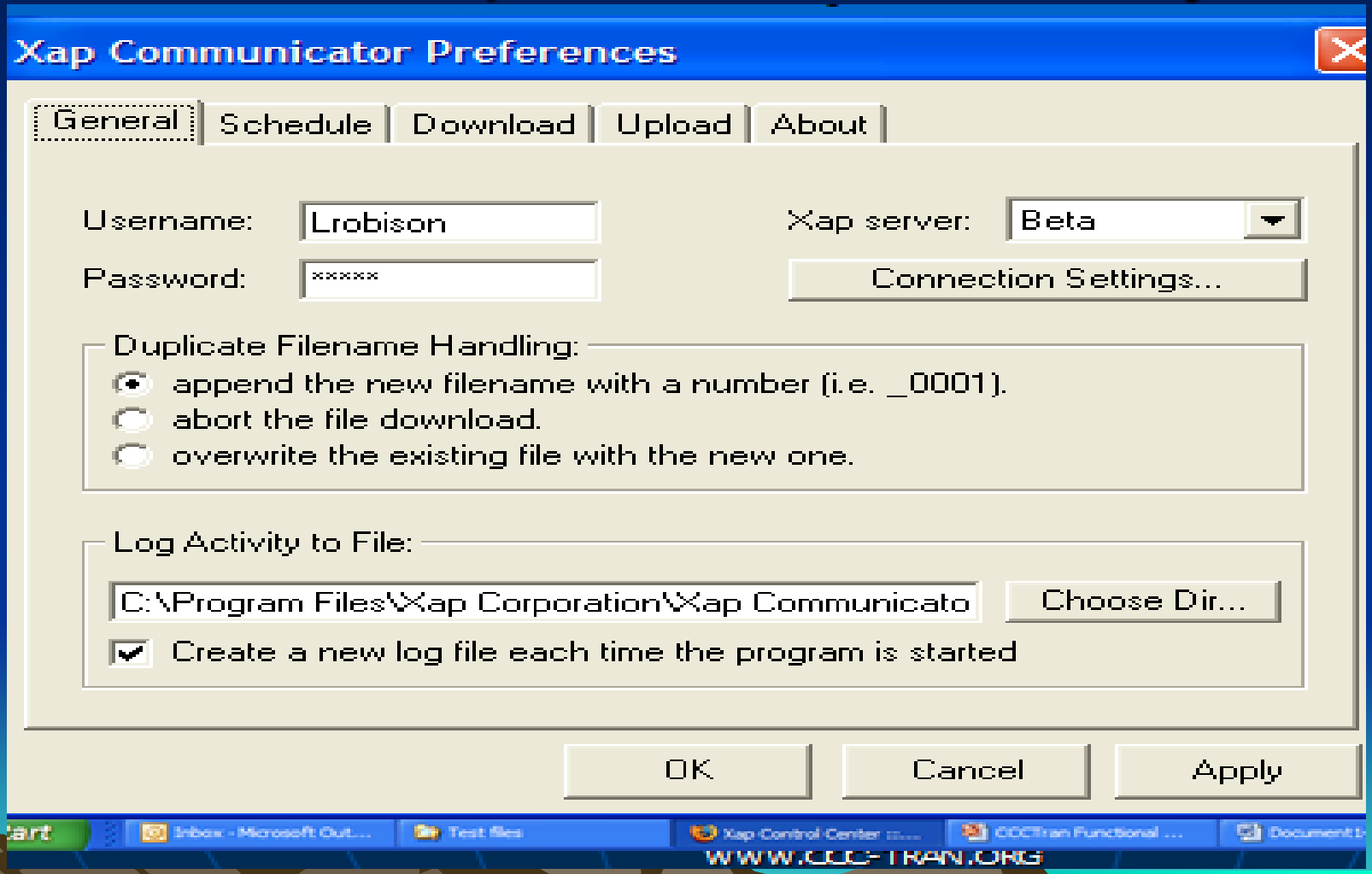
Workflow - Fulfilling Transcript Requests

- Downloading Online Requests
  - Xap Communicator or manually
- Fulfilling Request from SIS
  - IT program to match records & extract
- Hold Processing
  - IT program to furnish response code to eTranscript California and trigger Response to requestor
- Uploading Transcripts
  - Xap Communicator uploads from folder

Download Requests Manually or Schedule Automated Process



Download Requests or Upload Transcripts - Automatically



Hold Processing

Student Information

Student name:	Robison, Lenny		
Date of birth:	10/11/1980		
Social security number:	566123456		
Transcript institution:	Sacramento City College	Student ID:	
Recipient institution:	CSU Sacramento	Student ID:	
Student email:	lenny.robison@sbcglobal.net		
Current status:	Transaction On Hold		
Request conf. number:	1372687		

Transcript Transaction History

Transcript Fulfillment Workflow

Action	Date	Notes
New Request	4/7/2009 5:04:22 PM	
Request Approved	4/7/2009 5:04:23 PM	Automatic approval
Response Uploaded	4/7/2009 5:08:29 PM	(OR) Offline Records Search Required: Search for online records
Transaction Held	4/7/2009 5:08:29 PM	(OR) Offline Records Search Required: Search for online records

Actions

cancel request | update/release hold | add note | close

Workflow Email

Fulfillment Workflow - Transcript Request Submitted

Transcript Stage Change Action

Current Tasks

	Task	Active	Rule	On Success	Order
○	Transcript Institution Notification E-Mail.	No		Continue	▲ ▼
○	Requesting Institution Notification E-Mail.	Yes		Continue	▲ ▼
○	Recipient Notification E-Mail.	No		Continue	▲ ▼
○	Custom Notification E-Mail For Anybody.	No		Continue	▲ ▼
○	Student Confirmation E-Mail.	No		Continue	▲ ▼

edit copy delete

Add New Task

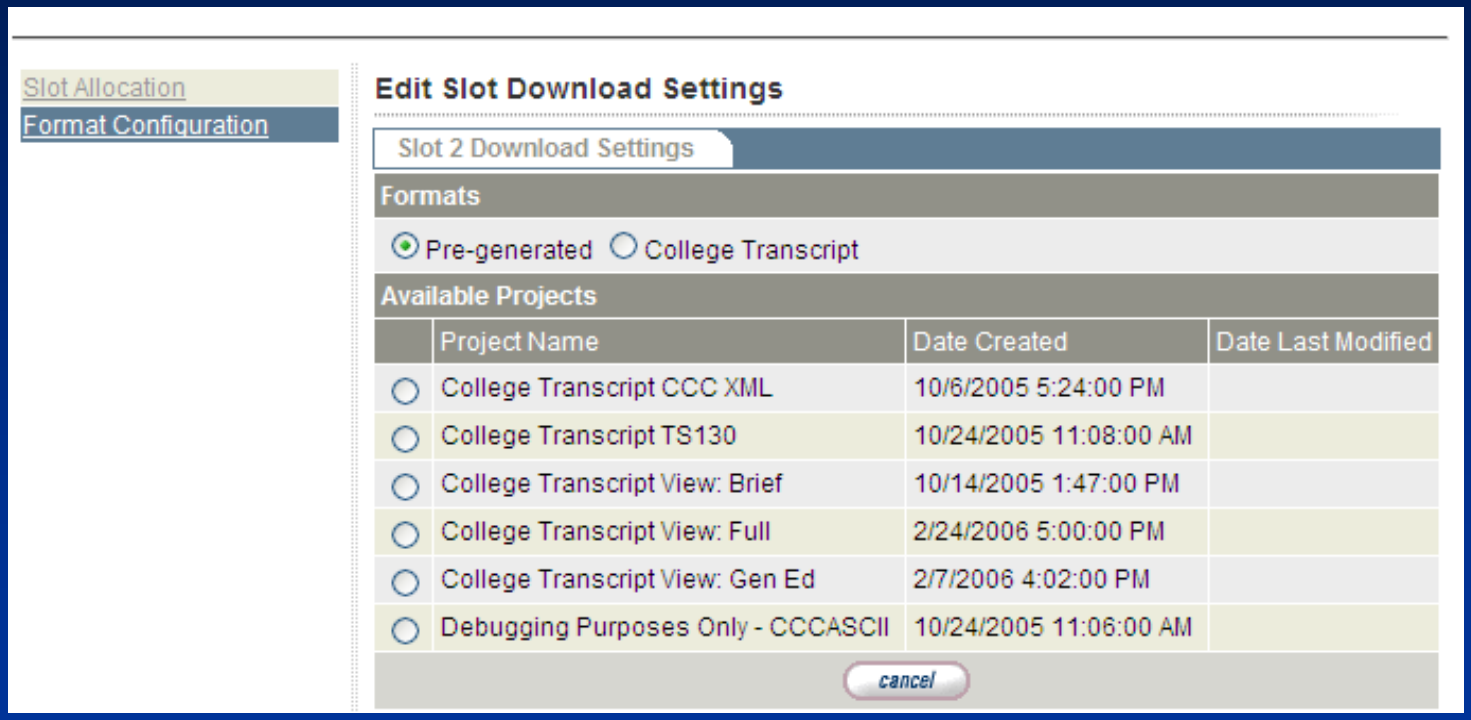
	Task	Task Description
○	Student Confirmation E-Mail.	Send confirmation email to the student.
○	Transcript Institution Notification E-Mail.	Send confirmation email to the Transcript Institution.
○	Requesting Institution Notification E-Mail.	Send confirmation email to the Requesting Institution.
○	Recipient Notification E-Mail.	Send confirmation email to the Recipient Institution.
○	Custom Notification E-Mail For Anybody.	Send confirmation email to anybody you want.

add

Determine your approach to Receiving Transcripts

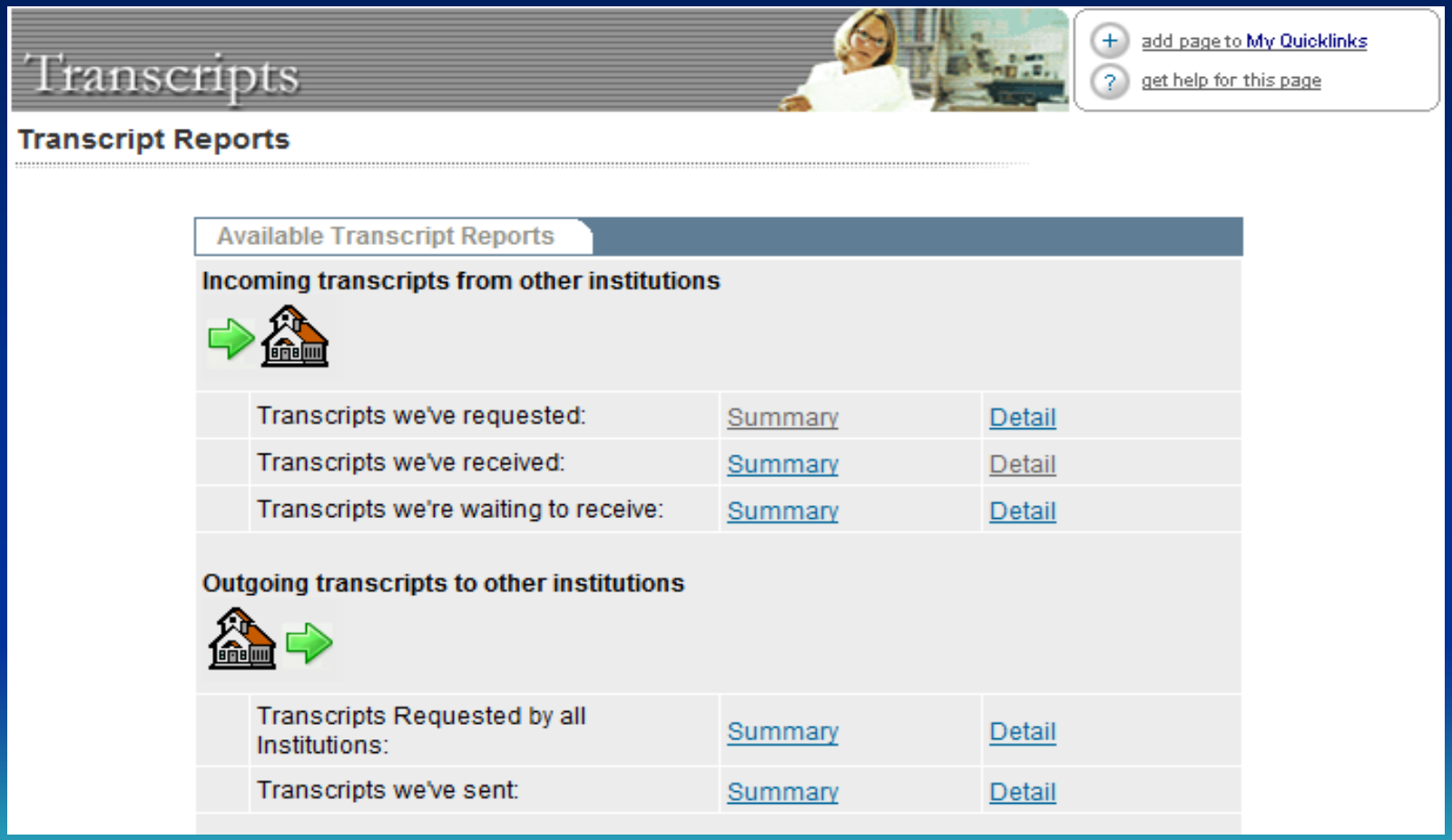
- Define your scope
  - Request/receive or both?
  - Interactive or automated processing?
  - View and/print in what format?
  - Download in what format and update SIS?

Transcript Download Formats

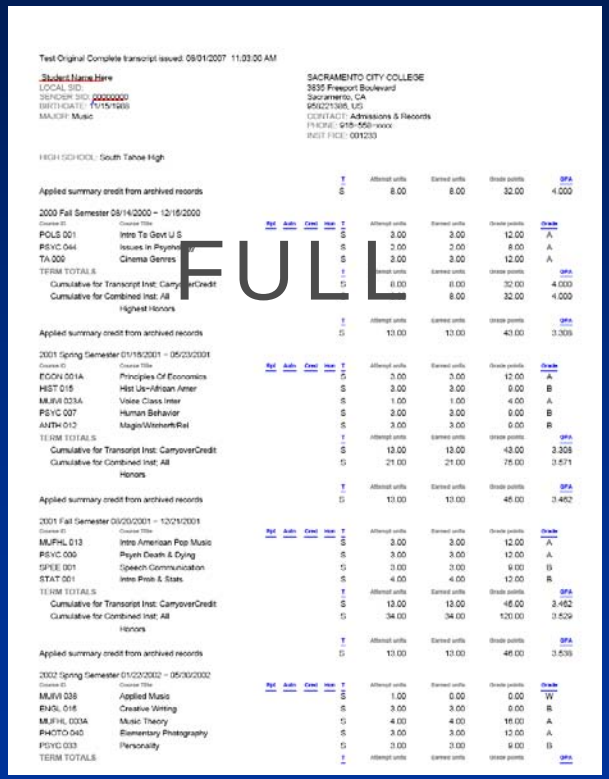


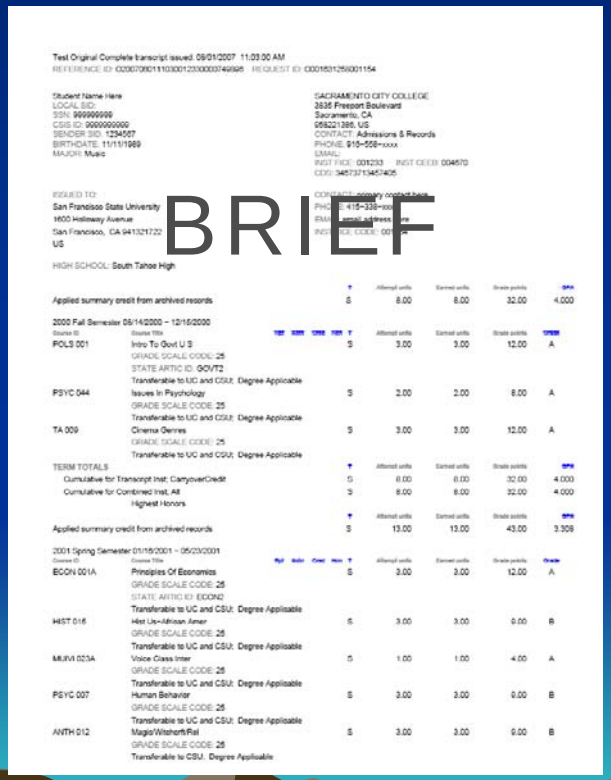
- Standard Transcript Download Formats - TS130; XML; HTML; PDF; CCCASCII for internal testing

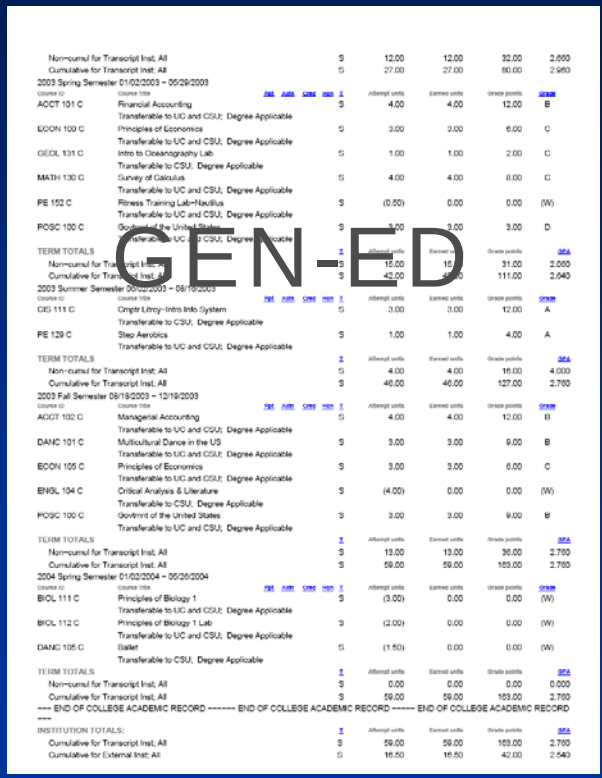
Reporting


Transcripts
add page to My Quicklinks
get help for this page
Transcript Reports
Available Transcript Reports
Incoming transcripts from other institutions
Transcripts we've requested: Summary Detail
Transcripts we've received: Summary Detail
Transcripts we're waiting to receive: Summary Detail
Outgoing transcripts to other institutions
Transcripts Requested by all Institutions: Summary Detail
Transcripts we've sent: Summary Detail

Common Transcript Views







Gen-Ed Additions

GE Certification Table on Transcript View

GENERAL EDUCATION CERTIFICATION

CSU GE Completed		05/30/2005	CSU IGETC			UC IGETC		
Area A	Y	05/30/2005				Area 1	N	
Area B	Y	05/30/2005				Area 2	N	
Area C	P	03/10/2005				Area 3	Y	05/30/2005
Area D	Y	05/30/2005				Area 4	N	
Area E	Y	12/15/2004				Area 5	P	03/15/2005
Amer. Hist/Inst	Y	07/10/2004				Area L	N	

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

Gen-Ed Additions

Course details – GE & IGETC information

2004 Spring Semester 01/15/2004 – 03/30/2004

Course ID	Course Title	Rpt Actn CredHon	T	Course units	Earned units	Grade points	Grade
Hist 1101A	**American history**	**H**	**S**	**3.00**	**3.00**	**10.50**	**B+**
	GRADE SCALE CODE: 55						
	LOCATION: North trade-tech campus						
	ALTERNATE COURSE ID: 001-233-15789						
	STATE ARTIC ID: 1234567890; CSU ARTIC ID: 0987654321						
	Transferable to UC/CSU; Degree Applicable						
	CSU GE Eligible A10, B1 Certified A10						
	CSU AMER.HIST Met;						
	CSU IGETC Eligible 1A, 2A						
	UC IGETC Certified 3B						
Engl 12A	**English composition**			**3.00**	**3.00**	**12.00**	**A**
	Transferable to CSU only; Degree Applicable						
PE 1500	**Aerobics**	**R ARCE O**	**S**	**0.00**	**0.00**	**0.00**	**F**
	Not transferable; not degree applicable						

TERM TOTALS	T	Attempt units	Earned units	Grade points	GPA
Non-cumul for Transcript Inst; All	S	6.00	6.00	22.50	2.555
Cumulative for Transcript Inst; All		11.00	11.00	42.50	3.555

Basic Steps for Implementation

- Xap will provide phone training
- Review Implementation guide
- Develop a process to build requests to Trading Partners
- Mapping your transcript data to eTranscriptCA files
- Programming SIS extraction
- Contact trading partner to get test transcripts for uploading into SIS
- Build processes to receive files
- Test receiving transcripts with trading partners
- Test sending transcripts with trading partners
- Confirm transcripts are complete and accurate
- Document internal business processes
- Test all processes before going live

Questions?

Further Information

Website: http://WWW.ETRANSCRIPTCA.ORG

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  Project Manager – CCCCO
- Catherine McKenzie — cmkenzi@cccco.edu
  Project Monitor – CCCCO

FERPA

" …FERPA allows schools to disclose those records without consent, to the following parties or under the following conditions (34 CFR § 99.31):

- School officials with legitimate educational interest;
- Other schools to which a student is transferring;
- Specified officials for audit or evaluation purposes;
- Appropriate parties in connection with financial aid to a student;…"