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

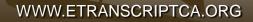
Requesting Transcripts

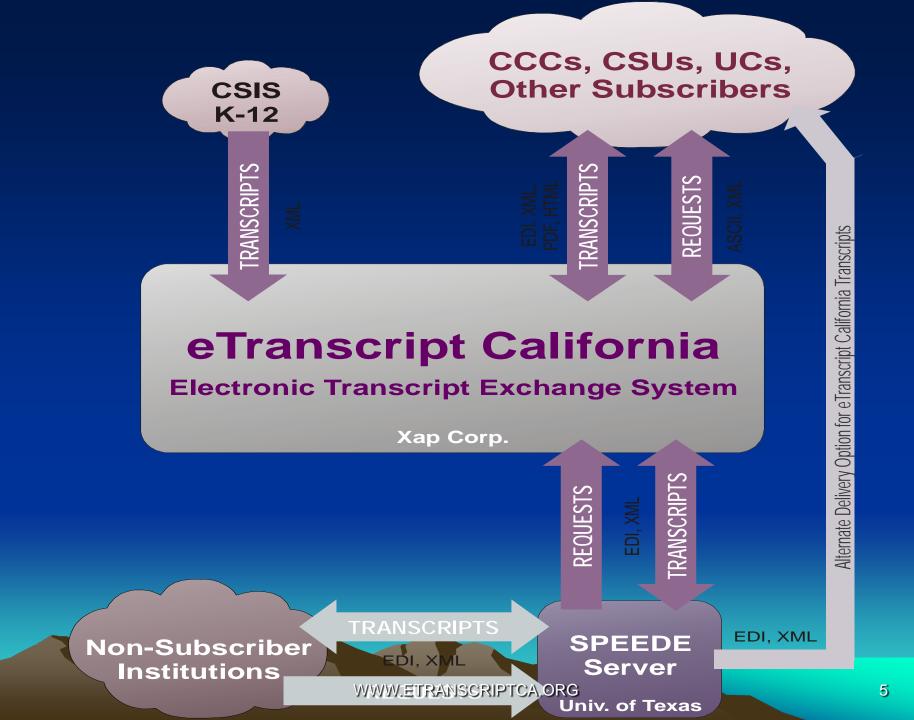
- Single (user interactive)
- Batch
- Bulk
- Request Holds Fulfilling Transcripts
- Download Requests
- Uploading Transcripts
- Messaging
- Hold Processing
- **Receiving Transcripts**
- Viewing, Printing
- Standard Views

- 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

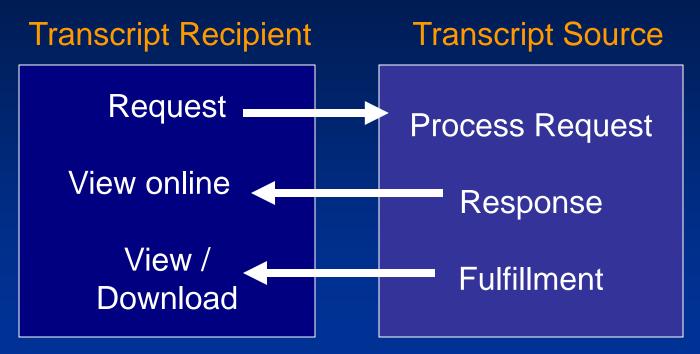
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General Information





Major Functionality



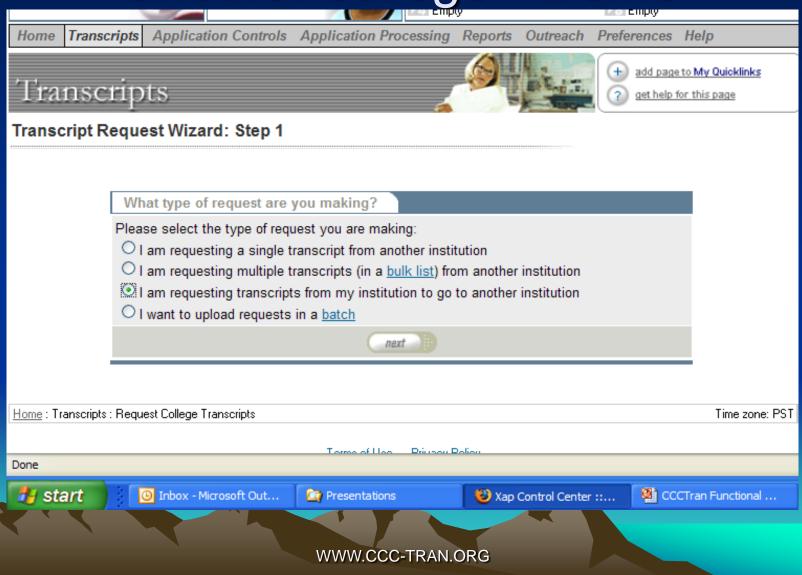
- Setup for either Manual or Automated processing
- Support for national standards XML & EDI
- Common eTranscript California Data Dictionary (ASCII based)
- Automated email messaging (optional setup)
 - Standardized transcript layout (online or printed)

Transcript Options

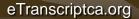
		2		т 0
Home	Transcripts Preferences Help			
	Request College Transcripts			
ß	Fulfill College Transcript Requests	\sim		
	Download College Transcripts			
	Download High School Transcripts	^{My} Control C	enter	
Data Ma	Account Manager	Ferm Status		
	Reports	Term	Status	Notes
Und		Fall 2006	CLOSED	
· · · · ·		Calendar		
Help	About eTranscriptCA	Event Start	Date	End Date

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Push Transcript from my college to another college - Demo



Demo – Request Transcript from my college to another



Request Transcript from another College - Demo

What type of request are you making?

Please select the type of request you are making:

I am requesting a single transcript from another institution

I am requesting multiple transcripts (in a <u>bulk list</u>) from another institution

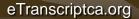
I am requesting transcripts from my institution to go to another institution.

O I want to upload requests in a <u>batch</u>



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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

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Download Requests Manually or Schedule Automated Process

Transcript Fulfillment Manager										
View Options										
Transaction status:	Transaction status: All									
Transcript Fulfillment Workflow										
All Transactions	Options									
View using: Default View										
From: 4/1/2009 to: 4/30/2009 Rule: None Results: 100 V update										
Search for:		leave empty for all records	i -							
All Transactions	(<u>Open in Excel</u>)									
<u>View Activity</u>	Status	<u>Response Status</u>	Last Name	<u>First Name</u>	<u>M. I.</u>	<u>Student ID</u>	Date Requested	Requested By		
2	Transcript Delivered		Graziadei	Linda			04/01/2009	National University		
2	Transaction Held	НО	Marks	Janelle			04/01/2009	National University		
2	Transaction Held	НО	Ramahi	Anna			04/01/2009	National University		
2	Request Approved		Graziadei	Linda			04/06/2009	National University		
			Results	s: 1-4						
		download i	requests u	oload transcripts/respo	onses					
Done										
🦺 start	🕒 Inbox - Microsoft Out	🔄 Test files	🕹 Xap Control Cent	ter :: 🛯 🖉 CCCTr	an Functio	onal 👜 Doci	ument14 - Micros			
	WWW.CCC-TRAN.ORG									

Download Requests or Upload Transcripts - Automatically

Xap Communicator Preferenc	es 🗾 🔀							
General Schedule Download Upload About								
Username: Lrobison Password: **** Duplicate Filename Handling:	Xap server: Beta 💌 Connection Settings							
 append the new filename with abort the file download. overwrite the existing file with 								
Log Activity to File:	onWap Communicato Choose Dir							
C:\Program Files\Xap Corporation\Xap Communicato Choose Dir Image: Create a new log file each time the program is started								
	OK Cancel Apply							
lart 💿 Inbox - Microsoft Out 🍉 Test files WWW.C	Kep Control Center :: COCtran Functional Document L W W W.CCCC:- I KAIN, CORC:							

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 WWW.CCC-TRAN.ORG

Workflow Email

Fulfillment Workflow - Transcript Request Submitted

Transcript Stage Change Action

Cu	rrent Tasks							
	Task	Active	Rule	On Success	Order			
\odot	Transcript Institution Notification E-Mail.	No		Continue				
\bigcirc	Requesting Institution Notification E-Mail.	Yes		Continue	\odot			
\odot	Recipient Notification E-Mail.	No		Continue				
\bigcirc	Custom Notification E-Mail For Anybody.	No		Continue	\odot			
\odot	Student Confirmation E-Mail.	No		Continue	\odot			
	edit copy delete							

Ad	d New Task	
	Task	Task Description
\bigcirc	Student Confirmation E-Mail.	Send confirmation email to the student.
\bigcirc	Transcript Institution Notification E- Mail.	Send confirmation email to the Transcript Institution.
\bigcirc	Requesting Institution Notification E- Mail.	Send confirmation email to the Requesting Institution.
\bigcirc	Recipient Notification E-Mail.	Send confirmation email to the Recipient Institution.
\bigcirc	Custom Notification E-Mail For Anybody.	Send confirmation email to anybody you want.
	C	add 16

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

Slot Allocation	Edit	Slot Download Settings						
Format Configuration	Slo	ot 2 Download Settings						
	Form	nats						
	● 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					
	\bigcirc	College Transcript TS130	10/24/2005 11:08:00 AM					
	\circ	College Transcript View: Brief	10/14/2005 1:47:00 PM					
	\bigcirc	College Transcript View: Full	2/24/2006 5:00:00 PM					
	\circ	College Transcript View: Gen Ed	2/7/2006 4:02:00 PM					
	\bigcirc	Debugging Purposes Only - CCCASCII	10/24/2005 11:06:00 AM					
		Ca	ncel					

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



Reporting

Transcrip	ots		+ add page to t ? get help for t	My Quicklinks his page
Transcript Repo	orts			
Av	ailable Transcript Reports			
Inco	oming transcripts from other institutions	S		
	Transcripts we've requested:	Summary	Detail	
	Transcripts we've received:	Summary	<u>Detail</u>	
	Transcripts we're waiting to receive:	Summary	<u>Detail</u>	
Out	going transcripts to other institutions			
	Transcripts Requested by all Institutions:	Summary	Detail	
	Transcripts we've sent:	Summary	<u>Detail</u>	

Common Transcript Views

Test Original Complete transpirat issued: 05/01/2007 11:03:00 AM

Student Name Her LOCAL SID: SENDER SID: 000 DERTHOATE: 1949 MAJOR: Music	SACRAMENTO CITY COLLEGE 3535 Freque t Boleward Support of the COTITACT: Advessors & Reports FIELD: 155-550-000 Ref FIEL: 00120									
HIGH SCHOOL S	outh Taboe High									
						T	Attenut units	Earted artis	drade puterla	-
Appled summary of	redit from archived records					s	8.00	8.00	32.00	4.000
	r 08/14/2000 - 12/16/2000									
POLS 001	Intro To Govt U S	844	Adh	Carel		- 10	Afternal solls 2.00	2.00	12.00	A
PSYC OH	Issues in Psycho					ŝ	2.00	2.00	8.00	2
PSYC OH TA 000						s	3.00	2.00	12.00	Â
TERM TOTALS	Cinema Genres					5	2.00 strate	00.6	12.00	
	in the second second					1				000
	Transcript Inst: Carry Credit		7			5	8.00	8.00	32.00	4.000
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Annala a succession of	redit from archived records					ŝ	13.00	13.00	43.00	3,200
white an and the state of the s	AREAS FOR THE AREAS FROM THE COURSE					1	13.00	13.00	+3.00	3.306
2001 Spring Seme	ster 01/18/2001 - 05/23/2001									
Course D	Course Tille		-	freed	-	τ	Atlengt solls.	Earned sortis	Grade petida	Grade
ECON 001A	Principles Of Economics		_	-	_	5	2.00	3.00	12.00	
HIST 015	Hist Us-African Amer					s	3.00	3.00	0.00	в
MUNI 0234	Volce Class Inter					s	1.00	1.00	4.00	A
PSYC 007	Human Behavior					s	2.00	3.00	0.00	в
ANTH 012	Magin/WtcherthRel					s	3.00	3.00	0.00	B
TERM TOTALS						T	Attempt units	Earned units	drade points	047
	Transcript Inst: CarryoverCredit					s	13.00	13.00	43.00	3.305
Cumulative for (Contributed Inst; All Honors					5	21.00	21.00	75.00	3.571
	The last					T	Attempt units	Exted with	thrade puterts	974
Appled summary o	redit from archived records					5	13.00	13.00	45.00	3.462
TOT EAL Camana	00202001 - 12/21/2001									
Dores B	Course Tille	244	Auto	Cred	-	7	Alternation the	Samuel and a	Grade points	Oralle
MUFHL 013	Intre American Pop Music	_	_	-		ŝ	3.00	3.00	12.00	A
PSVC 000	Psych Death & Dying					s	3.00	3.00	12.00	A
SPICE 001	Speech Communication					5	3.00	3.00	8.00	8
STAT OD1	Intro Prob & Stats					s	4.00	4.00	12.00	8
TERM TOTALS						1	Atlemat units	Earned unlike	Grade poleta.	074
	Transcript Inst: CarryoverCredit					s	13.00	13.00	46.00	3.462
Cumulative for (Combined Inst; All					5	34.00	34.00	120.00	3.529
	Honors						Attempt write	Exted with	throader publicities	974
Appled summary a	redit from archived records					5	13.00	13.00	46.00	3.538
2002 Spring Seme	ster 01/23/2002 - 05/30/2002									
Cores E	Course Title	204	Auto	Creel		1	Alternal sellis	Earted units	Grade points	Oracle
MUIVI 038	Applied Music	_	_	_		ŝ	1.00	0.00	0.00	W
ENGL 016	Creative Writing					s	3.00	3.00	0.00	в
MUFHL 003A	Music Theory					5	4.00	4.00	16.00	A
PHOTO D40	Elementary Photography					\$	3.00	3.00	12.00	A
PSYC 033	Personality					5	3.00	3.00	8.00	в
TERM TOTALS							Attempt units	Carrier Lints	Used# points	

Test Original Complete transprint issued, 05/01/2007, 11:03:00 AM NCE ID: 02007090111030012330000749898 REQUEST ID: 0001631258001154

Student Name Hare

LOCAL BID: SSN: 909909999 3835 Freeport Boulevard Sacramento, CA 968221386, US CONTACT: Admissions & Records CSIS ID: 9000000000 SENDER SID: 1234507 BIRTHDATE 11/11/1989 PHONE \$10-558-000 MANUTE MART NGT FICE: 001233 ... INST CELLE 004570 000134673713457425 San Francisco State University B 1600 Hisloway Avenue San Francisco, CA 941321 115 HIGH SCHOOL: South Takee High Applied summary credit from archived records 8.00 8.00 32.00 4.000 2000 Fail Semesier 05/14/2000 - 12/15/2000 Intro To Govt U S 3.00 12.00 POLS 001 3.00 OF SOME SCALE CODE-24 STATE ARTIC ID. GOVT2 Transferable to UC and CSU; Degree Applicable 2.00 2.00 8.00 PSYC 644 Issues in Psychology 5 - A GRADE SCALE CODE 25 Transferable to UC and CSLP. Decree Applicable 3.00 12.00 TA 009 Cinema Genres s 3.00 14 CRADE SCALE CODE: 26 Transferable to UC and CSUt; Degree Applicable TERM TOTAL S ٠ Marriel units Epresidently. Directo animis -Cumulative for Transcript Inst; CarryoverCredit 8.00 8.00 32.00 4.000 Cumulative for Contined Inst, All 8.00 8.00 32.00 4.000 Highest Honors Applied summary credit from archived records 13.00 13.00 43.00 3,309 2001 Spring Semester 01/16/2001 - 05/23/2001 By and the mon T Principles Of Feanamins 12.00 FCON 001A 3.00 3.00 . GRADE SCALE CODE 28 STATE ARROND FOR EDOMO Transferable to UC and CSU: Depree Applicable HIST DIE Hist Us-African Amer 3.00 3.00 0.00 B \$ GRADE SCALE CODE: 26 ransferable to UC and CSU: Degree Applicable ARID/0.0234 Voice Class Inter . 1.00 1.00 +10 + SPADE SCALE CODE: 28 Transferable to UC and CSU: Degree Applicable PSYC 007 s 3.00 3.00 9.00 Human Behavior 8 GRADE SCALE CODE 28 Transferable to UC and CSU: Degree Applicable ANTH 012 3.00 3.00 9.00 B Magio/WitehorthRel s GRADE SCALE CODE 28 Transferable to CSU. Degree Applicable

SACRAMENTO CITY COLLEGE

	Transferable to CSU; Degree App	vicable				
MATH 130 C	Survey of Calculus			5	4.00	4.00
	Transferable to UC and CSU; De	gree Applicable				
PE 152 C	Fitness Training Lab-Nautilus			s	(0.50)	0.00
	Transferable to UC and CSU; Dep	pree Applicable				
POSC 100 C	Government the Units of States		-	s	0.00	3,00
	JANZA, UC CSU: DR	pre 1 coble				
TERM TOTALS				Ξ	sites of sects	Earted
Non-cumul for 1	na ini inawa			3	15.00	15
Cumulative for 1	fran Nost-1			s	42.00	
	wster 00/02/2003 - 08/10/2003					
Course ID	Course Tibe	Det Auto	5780 1989	х.	Attempt units	Earned units
CIS 111 C	Cmptr Litroy-Intro Info System			5	3.00	3.00
	Transferable to CSU; Degree App	vicable				
PE 129 C	Step Aerobics			s	1.00	1.00
	Transferable to UC and CSU; Dep	gree Applicable				
TERM TOTALS				Ξ	Altempt units	Earned unifs.
	Transcript Inst; All			5	4.00	4.00
Cumulative for 1	Franscript Inst; All			3	40.00	40.00
	08/18/2003 - 12/19/2003					
Course ID	Course Title	265 248	5766 1985		Attempt units	Earned units
ACCT 102 C	Managerial Accounting			5	4.00	4.00
	Transferable to UC and CSU; Dep	gree Applicable				
DANC 101 C	Multicultural Dance in the US			3	3.00	3.00
	Transferable to UC and CSU; De	pree Applicable				
ECON 105 C	Principles of Economics			3	3.00	3.00
	Transferable to UC and CSU; De	gree Applicable				
ENGL 104 C	Critical Analysis & Literature			s	(4.00)	0.00
	Transferable to CSU; Degree App	vicable				
POSC 100 C	Governit of the United States			3	3.00	3.00
	Transferable to UC and CSU; Dep	gree Applicable				
TERM TOTALS				1	Attempt units	Earned units
Non-cumul for 1	Transcript Inst; All			3	13.00	13.00
Cumulative for 1	Franscript Inst; All			s	59.00	59.00
	ster 01/02/2004 - 05/26/2004					
Course ID	Course Title	Det Arte	5786 1988	1	Attempt units	Earned units
BIOL 111 C	Principles of Biology 1			3	(3.00)	0.00
	Transferable to UC and CSU; De	gree Applicable				
BIOL 112 C	Principles of Biology 1 Lab			s	(2.00)	0.00
	Transferable to UC and CSU; Dep	gree Applicable				
DANC 105 C	Ballet			5	(1.50)	0.00
	Transferable to CSU; Degree App	vicable				
TERM TOTALS				1	Attempt units	Earred units
Non-cumul for 1	Transcript Inst; All			3	0.00	0.00

Non-cumul for Transcript Inst; All

Cumulative for Transcript Inst: All

ACCT 101 C

ECON 100 C

GEOL 131 C

2003 Spring Semester 01/02/2003 - 05/29/2003

Financial Accounting

Principles of Econor

Intro to Oceanography Lab

Transferable to UC and CSU; Degree Applicable

Transferable to UC and CSU: Degree Applicable

Transferable to CSU: Decree Applicable

Cumulative for Transcript Inst. All END OF COLLEGE ACADEMIC RECORD END OF COLLEG	S E ACADEMIC	59.00 RECORD	59.00 END OF COLLE	103.00 GE ACADEMIC	2.700 RECORD
INSTITUTION TOTALS:		Attempt units	Earned units	Grade points.	074
Cumulative for Transcript Inst; All	s	59.00	59.00	163.00	2.700
Cumulative for External Inst; All	5	16.50	16.50	42.00	2.540

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Gen-Ed Additions

GE Certification Table on Transcript View

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

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

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Gen-Ed Additions

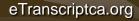
Course details – GE & IGETC information

2004 Spring Semester 01/15/2004 - 03/30/2004							
Course ID	Course Title					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:	098765432	1				
	Transferable to UC/CSU; Degree Applicab	le					
	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 Application	ble					
PE 1500	Aerobics	R ARCE	0	S 0.00	0.00	0.00 F	
	Not transferable; not degree applicable						
TERM TOTALS				Attempt units		Grade points GPA	
	Non- <u>cumul</u> for Transcript Inst;	A11		S 6.00	6.00	22.50,2.555	5
	Cumulative for Transcript Inst;	All		11.00	11.00	42.50-3.555	5

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

eTranscript Californa Project Team

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- Tim Calhoon
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- Leonard Robison
 Project Manager CCCCO
- Catherine McKenzie
 Project Monitor CCCCO

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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;..."