

eTranscript Request – Administrative Pages

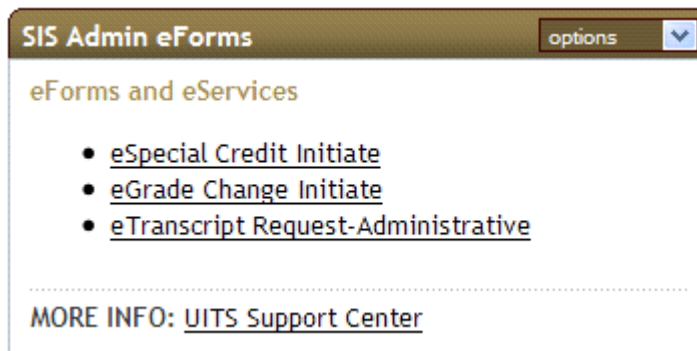
Overview

- eTranscript is available through OneStart for active students who can authenticate with their usernames and passphrases which replace their signature as permission to release the transcript. It is also available for inactive students who can provide information from their Indiana University record and authenticate through eTranscript Request.
- The Administrative Summary page will be used to manage requests behind the scenes.
- Security will be limited to users who have access to at least one institution, one of the existing transcript roles (SR Record Services 1, SR Record Services 2, SR Registrar 1, SR Registrar 2, SR Registrar 3 or SR Transcripts 2), and row level security for #OALL and #CALL transcript types. This page will also be Safeword card protected.
- All transcript types used for eTranscript Request end in '3'.

Pages

Administrative Summary Page

1. Administrators will access the *Administrative Summary* page via OneStart.
2. Click on the *Services* tab, then click **Administrative Systems**.
3. Click on **SIS** and go to the **SIS Admin eForms** channel.



4. Click eTranscript Request-Administrative.
5. The *Administrative Summary* page shows the **Order ID**, **Report Request number**, **EMPLID**, **Student Name**, **Campus**, **Transcript Type**, **Request Date**, **Status**, **Print Date**, and **Hold** information for each active request.

The **Order ID** is a unique number assigned by eTranscript Request when an order is created. The **Report Request Number** is created by SIS when the transcript request is generated.

eTranscript Request – Administrative Pages

Administrative Summary - eTranscript Request - Indiana University

Filters

Req Dt: (YYYY/MM/DD) Admin Status: Hold Status:

EMPLID: Name (Last, First Middle): Institution:

eTranscript Request - Status at East Campus

Print Status: **ON** BARR Printer: BRSS

Order ID	Rpt Req Nbr	EMPLID	Student Name	Campus	Trcpt Type	Request Dt	Status	Print Dt	Hold
2009040710591200		0000111111		IUEAA	OALL3	2009/04/07	Held		Degree Granted
2009032415125400		0000022222		IUEAA	OALL3	2009/03/24	Held		Curr Term Grds

6. The page will initially only show documents on hold, those that need validation, those with a TRAN impact since the request was created, or those ready to print. This page will refresh every 2 minutes to show the most recent orders in the statuses listed below.
- **Held (H):** Transcript requests will be checked daily by the system and printed automatically when the pending requirement is complete.
 - **Needs Validation (V):** Transcript requires validation, e.g. R18 service indicator. You can click on the order ID to view which service indicator the student has on her record. Once the validation service indicator has been removed, the request will change to a new status. It will change to **Ready-Request** if there are no other holds, or **Held** if the student also has specified special instructions.
 - **R19 Split (S):** Split requests that have part of the record online and part scanned and stored in Bloomington. All split requests are sent to Bloomington and printed manually (force print) when the scanned record has been located and printed.
 - **TRAN Impact After Hold (T):** Transcript request was on hold, then hold was satisfied and now student has service indicator with TRAN impact. Must contact students to see if SI can be resolved. If not, must refund credit card. After refund is awarded, status will change to **Refunded (Z)**.
 - **Ready – Request (R):** Transcript order has been paid. Request will be created on next cycle.

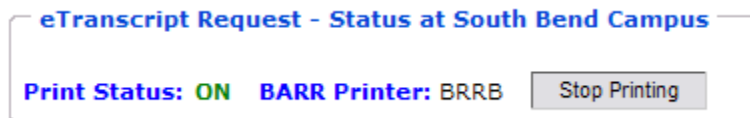
The other administrative statuses will be available for researching requests that have been submitted and are still going through the system.

- **Incomplete (I):** Request is pending payment
- **Ready - Generate (G):** Transcript request has been created, waiting to generate and print on next cycle (five minutes)
- **Printed – Auto (X):** Transcript processed normally and has been generated and printed
- **Manual Close (P):** Transcript requests that were in progress, but needed to be closed administratively because the student cancelled the request or the request was processed outside of eTranscript Request.
- **Force Print (F):** A request on hold that needs to be printed immediately can be “force” printed, overriding any holds the student may have placed during the request.

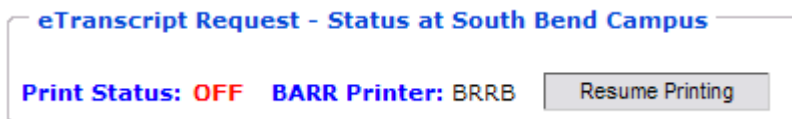
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7. You can search on the *Administrative Summary* page by **Request Date**, **EMPLID**, or **Name**. You can sort the requests by any of the **Admin Status** fields as well as on the **Hold** status. You can also view all requests and the most current status for the past 30 days.
8. To search by a particular criteria, enter or select a **Req Date** or choose an **Admin Status**, then click . To clear your search criteria and start over, click .
9. **Inactive Entry Lookup** can be used to search for inactive students to see if their request has been processed. This search is by university ID only, so if the student does not know his ID number, the administrative user will have to look it up by name in SIS first.
10. The *Administrative Summary* page can also be used to stop printing temporarily. This could be used to halt printing on a holiday or when staff are out of the office for several hours and don't want transcripts to pile up or have the printer run out of paper.

For each institution that you have access to view, you will see the current Print Status and BARR printer specified.



To stop printing, click . After clicking the button, the **Print Status** will change to **OFF** and the button will change to **Resume Printing**.



When you are ready to resume printing, click .

Administrative Detail Page

1. To view the details of a particular order, click on the **Order ID**.

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Administrative Detail - eTranscript Request - Indiana University

Administrative Information

Order ID: 2009040609254200	EMPLID:	Name:
Status: Printed - Auto	Last Update: PSETBATC	Last Update Dt: 04/14/2009 08:35:04
Report Request Nbr: 007014933	Payment Complete: Y	Payment Dt: 04/06/2009 09:27:09
Pay Click Dt: 04/06/2009 09:26:30	Print Dt: 04/14/2009 08:37:13	Manual Close Dt:
Force Print Dt:	Conf E-Mail Addr: sissr-ettrans-tech-l@listserv.indiana.edu	Charge Ind: C
Cr Card Resp: 123456	Cr Card Status: 1	Cr Card Conf ID: 20010354
Tot Amt: 7.00	Dlvry Chrg Only Amt: 0.00	Cr Card Refund ID:
Vldtion Srv Ind:	Finish Dt:	Cr Card Refund Dt:
Cr Card Rslt Msg: C	Entry Status: Active Entry	Frozen Transcript: N

Actions:
 Reprint Order: Finished:

Notes:

Request Information

Transcript Type: CALL3 Official Transcript with Enrollment **Request Dt:** 2009/04/06 09:25:42
Contact Phone Nbr: 812-855-0121

<u>Recipient</u>	<u>Address</u>	<u>Signed & Sealed?</u>	<u>Quantity</u>
	USA	No	1

Delivery Options: Regular Mail

Special Instructions/Hold Information

Release transcript after current term grades awarded: East, Spring 2009

Last Hold Review Dt: 2009/04/14 08:35:04

The *Administrative Detail* page provides many details about the request and payment.

- **Order ID:** Unique number created by eTranscript Request when the student initiates the transcript order
- **Status:** There are several different statuses to identify the stage of the request.
 - **Held (H):** Transcript requests will be checked daily and printed automatically when the pending requirement is complete.
 - **Needs Validation (V):** Transcript requires validation, e.g. R18 or other validation service indicator. You can click on the order ID to view which service indicator the student has on her record. Once the validation service indicator has been removed, the request will change to a new status. It will change to Ready-Request if there are no other holds, or Held if the student also has specified special instructions.

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- **R19 Split (S):** Split requests that have part of the record online and part scanned and stored in Bloomington. All split requests are sent to Bloomington and printed manually (force print) when the scanned record has been located and printed.
- **TRAN Impact After Hold (T):** Transcript request was on hold, then hold was satisfied and now student has service indicator with TRAN impact. Must contact students to see if SI can be resolved. If not, must refund credit card. After refund is awarded, status will change to Refunded (Z).
- **Ready – Request (R):** Transcript order has been paid. Request will be created on next cycle.

The other administrative statuses will be available for researching requests that have been submitted and are still going through the system.

- **Incomplete (I):** Request is pending payment
 - **Ready - Generate (G):** Transcript request has been created, waiting to generate and print on next cycle (five minutes)
 - **Printed – Auto (X):** Transcript processed normally and has been generated and printed
 - **Manual Close (P):** Transcript requests that were in progress, but needed to be closed administratively because the student cancelled the request or the request was processed outside of eTranscript Request.
 - **Force Print (F):** A request on hold that needs to be printed immediately can be “force” printed, overriding any holds the student may have placed during the request.
- **Report Request Nbr:** Assigned by SIS when the transcript is generated.
 - **Pay Click Dt:** The date and time when the student clicked the button to pay by credit card.
 - **Force Print Dt:** The date and time when a request is “force” printed.
 - **Cr Card Resp:** If Cr Card Status (see below) is 1, this field will contain the authorization code. If it is 2, it will contain the credit card rejection code. If it is 3 or 4, it will contain the credit card processing error code.
 - **Tot Amt:** The total amount charged to the credit card.
 - **Vldtion Srv Ind:** If a validation service indicator is/was on a student’s record, the service indicator code will appear here.
 - **Cr Card Rslt Msg:** This is a message describing the result of the transaction.
 - **EMPLID:** The student’s university ID.
 - **Last Update:** Username of the person who made the last update. This will display “PSETBATC” if the last update was an automatic print of the transcript.
 - **Payment Complete:** Yes/No field to indicate when the credit card payment has been processed.
 - **Print Dt:** The date and time when a request is printed.
 - **Conf E-Mail Addr:** The email address to which the request confirmation email is sent.
 - **Cr Card Status:** The response from the credit card company specifying the status of the payment. 1=Successful, 2=Declined, 3=Error, 4=Unknown.

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- **Delvry Chrg Only Amt:** The amount charged for express delivery.
- **Finish Dt:** The date and time the “Finished” box was checked. This box should be used when a request is done and has been sent out.
- **Entry Status:** The method of entry into eTranscript Request, Active Entry, Inactive Entry-Already Active, Inactive Entry – Use Frozen.
- **Name:** Student’s name
- **Last Update Dt:** The date and time when the last change was made to the request. This includes any administrative changes made by clicking “Update.”
- **Payment Dt:** The date and time the credit card or bursar payment was processed successfully.
- **Manual Close Dt:** The date and time the Manual Close action was taken.
- **Charge Ind:** C=Credit card, B=Bursar bill
- **Cr Card Conf ID:** Credit card confirmation number from IU Pay Plus when a charge is processed. This will be included on the confirmation email sent to the student.
- **Cr Card Refund ID:** Credit card confirmation number from IU Pay Plus when a refund is processed.
- **Cr Card Refund Dt:** Date refund was processed.
- **Frozen Transcript:** Whether or not the frozen transcript should be used, Y/N.

2. **Actions** available include the following:

Manual Close: Users can manually close requests that are not in **Print-Auto** or **Force Print** status that have been paid. This could be used when a student wants to change or cancel the request. No changes can be made to existing requests within eTranscript Request at this time. You must select the **Manual Close** check box and make a note explaining the action,


then click the  button.

Reprint Order: Users can reprint orders that have been paid and printed. This could be used when a transcript request is mailed, but never received by the recipient. This will reprint the original request with the original date on it. Any changes, made in SIS since the original transcript was printed, will NOT be captured. You must select the **Reprint Order** check box,

then click the  button.

Finished: Once a request has been printed and sent out, this box should be selected to

finalize the request. You must select the **Finished** check box, then click the  button.

3. The **Notes** field can be used to add notes about a request. This field can be updated at any point in the request. You must click the  button after entering a note to save it.

4. The **Request Information** section provides a summary of the recipient information including the transcript type, request date, recipient name and address, if the request was signed & sealed, the quantity, and delivery options.

5. The **Special Instructions/Hold Information** section repeats the special instructions requested by the student. These include degree hold, grade change hold, and current term grades hold. The special instructions will stay on the *Request Detail* page even after they are fulfilled. This is

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for research purposes.

The **Last Hold Review Dt** is the date and time this request was last reviewed to fulfill the special instructions. All held requests should be reviewed on a daily basis at the time specified in your config file (ETRANSCRIPT_PROCESS_HELD).

Administrative Inactive Entry Detail Page

- To view the details of an inactive order, use the **Inactive Entry Lookup** field. Search by university **ID**. If you do not have the university **ID** of the inactive student, you must search for it in SIS by the student's name.

Administrative Summary - eTranscript Request - Indiana University

Filters

Req Dt: (YYYY/MM/DD) Admin Status: Hold Status:

EMPLID: Name(Last,First Middle): Institution:

 Inactive Entry Lookup:

eTranscript Request - Status at South Bend Campus

Print Status: **ON** BARR Printer: BRRB

- The *Administrative Inactive Entry Detail* page will show the details about the attempts to access the system by the inactive student.

Administrative Inactive Entry Detail - eTranscript Request - Indiana University

Inactive Entry Authentication Information

EMPLID: Last Auth Atmpt Dt: 04/29/2009 08:40:18 Last Success Auth: 04/28/2009 13:12:27 Last Auth Failure: 04/29/2009 08:40:18
Reason Code: (none) Auth Fail Count: 2 Auth Entry Status: (none) Inact Entry Blocked: **Blocked**
Last Updt Dt: 04/29/2009 08:40:18 Last Updt OPRID: lgrether Block Rise Dt: 2009-05-29 08:40:18.499

Actions:
Unblock Inactive Entry:

Notes:

Authentication Attempt Information

Auth Atmpt Dt	Session ID	Last Name	First Name	National ID	Birth Dt	University ID	Auth Status	Reason	Entry Status	Institution	Frozen
04/07/2009	F259E42906DA30674CB7E8F11601EA2B.Sis2_1Engine						Successful	(none)	Unknown	IUBLA	N
04/07/2009	6C11DA403C0D5ABCCCE1D4AA0238EE65D.Sis2_1Engine						Failure	(none)	Unknown	IUBLA	N
04/08/2009	21486073173BCDE0EBE432B3AF8B5484.Sis2_2Engine						Failure	(none)	Unknown	IUBLA	N
04/08/2009	21486073173BCDE0EBE432B3AF8B5484.Sis2_2Engine						Successful	(none)	Active-Former Role	IUBLA	N
04/13/2009	48DD635A3ACAS11AFBAS3A83A5D8FDDA.Sis2_1Engine						Successful	(none)	Active-Former Role	IUBLA	N
04/13/2009	4E76781A6082E40B420F1210F6253AFB.Sis2_2Engine						Successful	(none)	Active-Former Role	IUBLA	N
04/14/2009	9E161FA41C1A2BF2260E1B1339330471.Sis2_2Engine						Successful	(none)	Active-Former Role	IUBLA	N
04/14/2009	BE3EA3D6724D5AEEA267F04B1DA24F27.Sis2_1Engine						Failure	(none)	Unknown	IUBLA	N
04/14/2009	CA16814A901E1929D52583ED9498B8ABE.Sis2_2Engine						Failure	(none)	Unknown	IUBLA	N
04/14/2009	99EB3A4AA085A438FAACCE2E42AAD7E3.Sis2_1Engine						Failure	(none)	Unknown	IUBLA	N
04/14/2009	6BF83E58CDE7AB66A8BDFE0CD49BAF7.Sis2_1Engine						Failure	(none)	Unknown	IUBLA	N
04/14/2009	6BF83E58CDE7AB66A8BDFE0CD49BAF7.Sis2_1Engine						Failure	(none)	Unknown	IUBLA	N
04/14/2009	C7663C463105D1DE7550D610C4422C89.Sis2_2Engine						Auth Blocked	(none)	Unknown	IUBLA	N

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- **EMPLID:** Student's university ID
- **Last Updt Dt:** Date and time of the last update to this page.
- **Last Auth Atmpt Dt:** Date and time of the student's last attempt to access eTranscript Request Inactive.
- **Auth Fail Count:** Number of times the student failed authentication.
- **Last Updt OPRID:** Operator ID of the last user to update this administrative detail page.
- **Last Success Auth:** Date and time of the student's last successful authentication.
- **Auth Entry Status:** The last entry status. Inactive – reactivated, Inactive – problem reactivating, Inactive – not reactivated (using frozen), Active - Former student (eligible for Inactive Entry method), CAS Authenticated Entry
- **Last Auth Failure:** Date and time of the student's last failed authentication.
- **Inact Entry Blocked:** Student's blocked status, Blocked = Locked out due to failed authentication attempts, Admin Blocked = Administratively blocked from using eTranscript Request, No = Student is not locked out
- **Block Rise Dt:** Date when student will automatically be released from block. If student is locked due to failed authentication, this will occur automatically 30 days after the failed authentication.

Administrative block

Students can be administratively blocked from using eTranscript Request. This could be used at the student's preference if he calls and says he does not want his record to be available electronically.

1. To administratively block a student from using eTranscript Request, click **Block Inactive Entry**. The **Inact Entry Blocked** status will change to **Admin Blocked**.

Administrative Inactive Entry Detail - eTranscript Request - Indiana University

Inactive Entry Authentication Information

EMPLID:	Last Auth Atmpt Dt: 2009/04/14 11:00:28	Last Success Auth: 2009/04/14 09:46:56	Last Auth Failure: 2009/04/14 10:48:26
Reason Code: (none)	Auth Fail Count: 2	Auth Entry Status: (none)	Inact Entry Blocked: Admin Blocked
Last Updt Dt: 2009/04/14 11:00:28	Last Updt OPRID: lgrether	Block Rise Dt:	

Actions:

Notes:

2. To unblock a student, click **Unblock Inactive Entry**.

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Actions:
Unblock Inactive Entry:

Notes:

update

3. Click .

Identifying eTranscript Requests in SIS

1. Use the **Report Request Number** or **EMPLID** to search for an eTranscript Request in SIS. Navigate to: **Records and Enrollment > Transcripts > Transcript Request**.
2. The *Request Header* page will display.

Request Header | Request Detail | lu Request Detail | Report Results | Report Errors

Report Request Nbr: 006096732 Request Date: 09/17/2008 User ID: PSETBATC

*Institution: IUEAA East
*Transcript Type: OALL3 Official All Careers
 Freeze Record
 Override Service Indicator

*Output Destination: Printer
Number of Copies: 1
Future Release: Immediate Processing
Academic Career:
Term:
Print Date: 09/17/2008
Request Reason: eTranscript Request
 Cancel Request

Save Return to Search Add Update/Display

[Request Header](#) | [Request Detail](#) | [lu Request Detail](#) | [Report Results](#) | [Report Errors](#)

- The **Transcript Type** will always end in '3' to denote an eTranscript Request.
- The **Request Reason** will always display "eTranscript Request".

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3. On the *Request Detail* tab and the *IU Request Detail* tab:

The screenshot displays the 'IU Request Detail' tab. At the top, there are navigation tabs: Request Header, Request Detail, **IU Request Detail**, Report Results, and Report Errors. Below the tabs, the 'Report Request Nbr' is 006096732, and the status is 'Completed'. The 'Transcript Type' is 'OALL3 Official All Careers'. There are buttons for '*BARR Printer: Process Request' and 'Print All'. A 'Process Monitor Report Manager' link is also present. The main section shows a table with columns for *Seq Nbr, *ID, Name, and Number of Copies. The first row shows Seq Nbr 1, ID 0000011111, Name Student Ima, and Number of Copies 1. Below this is a 'Calculated Transcript Charges' table with columns for Number of Copies, Item Amount, Transcript Fee, Override Total, Fax/Other, and No Charge. The first row shows 1 copy, \$7.00 item amount, \$7.00 transcript fee, and a \$7.00 override total. There is also a 'Transcript Payment Information' section with fields for Amount Paid (\$7.00), Balance Due (\$0.00), and Refund Amount (\$0.00). A 'Payment Method' dropdown is set to 'IU Pay Plus'. The 'Notes' section contains the text: 'Credit card confirmation code: 20005693. Delivery Option: Mail'. At the bottom, there are buttons for Save, Return to Search, Add, and Update/Display, along with a navigation bar.

- The **Number of Copies** and **Send** address will be reflected for each recipient.
- The **Amount Paid** will reflect the amount charged to the student's credit card/bursar bill.
- The **Payment Method** will be **IU Pay Plus** if the student paid by credit card.
- The **Notes** will reflect the credit card confirmation code from IU Pay Plus as well as the delivery option specified by the student.
 - If the request was printed from an IUIS Frozen Transcript, the notes will say "frozen transcript."

IUIE Reports

There will be five reports in the IUIE for researching eTranscript Requests. They will be located under Student > Records > Registrar.

- eTranscript Request – All Requests
 - For researching any request, in any status, regardless of how long ago it was produced.
- eTranscript Request – Held Requests
 - For researching requests in "held" status.
- eTranscript Request – Reconciliation
 - For performing the regular reconciliation maintenance to ensure that the amount charged from the transcript requests on your campus was deposited into your

eTranscript Request – Administrative Pages

account. The credit card fees will not be reflected in this report, but will be managed through an automated file with the Office of the Treasury in conjunction with US Bank for Visa and Mastercard charges and manually on a monthly basis by Treasury staff.

- eTranscript Request – Charges to refund (TRAN Impact)
 - For identifying students who requested a transcript be held for special instructions, then a service indicator was assigned to their record with a TRAN impact before the transcript could be printed. These students must be notified and told to clear the service indicators or refund their credit cards for the charges.
- eTranscript Request – Total Number of Requests
 - For statistical research to determine the total number of eTranscript Requests received during a given period.