eTranscript Request – Administrative Pages

Overview

eTranscript is available through One.IU 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.

- Students will pay for their transcripts using PayPal. If the students have an existing PayPal account, they can use it to pay via credit card, debit card, or bank account. If they do not have an existing PayPal account, they should use the guest account feature and enter a debit or credit card for a single transaction.

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 require DUO authentication.

All transcript types used for eTranscript Request end in ‘3’.

Steps

Administrative Summary Page

Administrators will access the Administrative Summary - eTranscript Request page via one.iu.edu.

1. Log into one.iu.edu.
2. In the Search bar, type, “transcript request” and press ENTER.
3. Click on the eTranscript Request (Administrative) task.

The Administrative Summary - eTranscript Request page shows the Order ID, Report Request number, EMPLID, Student Name, Campus, Transcript Type, Request Date, Status, Print Date, Hold and PDF 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.
4. 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 it will change to **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, the hold was satisfied and now the student has service indicator with TRAN impact. Must contact students to see if service indicator 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 the 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
- **Closed Manual (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.
- **Printed Force (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.

5. You can search on the **Administrative Summary – eTranscript Request** 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** field. You can also view all requests and the most current status for the past 30 days.

6. To search by a particular criteria, enter or select a **Req Date** or choose an **Admin Status**, then click **submit**. To clear your search criteria and start over, click **clear**.

7. **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 students do not know their ID number, the administrative user will have to look it up by name in SIS first.

8. The **Administrative Summary – eTranscript Request** 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.
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For each institution that you have access to view, you will see the current Print Status and BARR Printer specified.

To stop printing, click Stop Printing. 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 Resume Printing.

Administrative Detail Page

1. To view the details of a particular order, click on the Order ID.
If the transcript is being sent via PDF, the recipient information will include the recipient's email address.

The Administrative Detail – eTranscript Request 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.
  - **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:** This field will display a random string of characters.

- **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.

- **Dlvry 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, or Reactivated.

- **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 PayPal 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 PayPal 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 update.

**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 update.

**Send to Print:** This button will only appear when an order is left in incomplete status because the credit card payment did not make it over to the eTranscript Request system, but a second validation confirmed that the credit card payment was processed. In addition to this button the bottom of the page should reflect the Order Number and Transaction Id associated with the credit card payment.

**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 update.

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 update 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 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).

6. The **Order Number** section will show credit card charges that were processed but either 1) the order was left in incomplete status, therefore, it wasn’t processed by the eTranscript Request system automatically or 2) orders that were charged twice on two different Transaction Ids associated with the same order number. If you see an order like this, the bottom of the page will show **Multiple credit card payments** in red so you are aware that a refund needs to be processed for one of the orders. Note: the order numbers are the same with two different transaction/credit card confirmation IDs.

### Multiple credit card payments

<table>
<thead>
<tr>
<th>Order Number</th>
<th>Transaction Id</th>
<th>Order Amt</th>
<th>Result Message</th>
</tr>
</thead>
<tbody>
<tr>
<td>2012020019012120</td>
<td>9733115</td>
<td>40</td>
<td>APPROVAL</td>
</tr>
<tr>
<td>2012020019012120</td>
<td>9733365</td>
<td>40</td>
<td>APPROVAL</td>
</tr>
</tbody>
</table>
Administrative Inactive Entry Detail Page

1. 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.

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

- **EMPLID**: Student’s university ID
- **Last Updt Dt**: Date and time of the last update to this page.
- **Last Auth AtmpDt**: Date and time of the student’s last attempt to access eTranscript Request Inactive.
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- **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 the **Block Inactive Entry** checkbox.

2. Click **update**. The **Inact Entry Blocked** status will change to **Admin Blocked**.
3. To unblock a student, click **Unblock Inactive Entry**.

4. Click **update**.

**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.

- The **Transcript Type** will always end in ‘3’ to denote an eTranscript Request.
- The **Request Reason** will always display “eTranscript Request”.
3. On the Request Detail tab and the IU Request Detail tab:

- 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 **PayPal** if the student paid by credit card.
- The **Notes** will reflect the credit card confirmation code from PayPal 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.”