

# eTranscript Batch

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**Classic View:** [Grading and Standards > Reports > eTranscript Batch](#)

**Search Terms:** eTranscript Batch

The eTranscript Batch Report allows users to generate eTranscripts to upload to third party vendors. In order to do this, an [eTranscript Report](#) must be created in the [Report Setup](#) tool.

*eTranscript Batch Report*

## eTranscript Workflow

Generating the eTranscript Batch Report is Step 11 in the workflow.

▶ [Click here to expand...](#)

The following workflow provides information on using eTranscripts.

Step	Campus Location
1. Assign tool rights to eTranscripts for the appropriate users (see table below).	System Administration > User Security > Tool Rights
2. Verify the school's <a href="#">CEEB number</a> is entered.	System Administration > Resources > School
3. Establish <a href="#">Code Defining</a> values for diploma type.	System Administration > Data Defining Tools > Code Defining
4. Configure a <a href="#">server connection</a> to your eTranscript vendor's API for electronic release functionality.	System Administration > Preferences > eTranscripts > Electronic Release Setup
5. Select eTranscript report type and customize <a href="#">eTranscript report preferences</a> .	System Administration > Preferences > Reports > eTranscripts
6. Verify <a href="#">PESC Test and PESC Sub-test options</a> are entered on tests for assessments that are chosen on preferences. For example, if the student's ACT score should be included in the eTranscript, verify these fields are populated for the ACT test.  In order for tests to report, at least one date and one score must be present in a Campus Test Family (Parent Test or Child Test).  The Display in Transcripts checkbox must be marked to select these options.	Assessment > Test Setup
7. Verify <a href="#">PESC grade levels</a> are assigned to grade levels.	System Administration > Resources > Grade Level Definitions
8. Ensure a PESC Name assigned to the <a href="#">Credit Groups</a> .  If the Credit Group does not have a PESC Name assigned, it will not be reported in the PESC output on the eTranscript.	Grading and Standards > Credit Groups > PESC Name

Step		Campus Location
9.	Verify the Diploma Type, Diploma Date and NGA Cohort Year are populated on the student's <a href="#">Graduation</a> record.	Student Information > General > Graduation
10.	Confirm the student has <a href="#">transcript</a> records.	Student Information > Counseling > General > Transcripts  Student Information > General > Transcripts
11.	Use the <a href="#">eTranscript Batch Report</a> to generate an eTranscript for multiple students.  Options are available to display the eTranscript (PESC XML output) immediately or to submit a batch of eTranscript records to Batch Queue to download at a later time, or release the records.	Grading and Standards > Reports > eTranscript Batch
12.	Download (save) and send eTranscript files to third party eTranscript vendors.	N/A

Only students with **primary enrollments** (Enrollment Service Type is P: Primary) are included in eTranscripts.

## eTranscript Batch Editor

The following provides information on the options available on the eTranscript Batch editor.

Option	Description
<b>Report Required</b>	Determines which <a href="#">eTranscript report</a> generates. eTranscript reports are created in <a href="#">Report Preferences</a> . A report must be selected in order to generate the report.
<b>Student Selection</b>	Students can be selected by choosing a <b>Grade</b> level of enrollment, an <b>Ad hoc filter</b> , or by <b>searching for students</b> .

Option	Description
	<p><b>Grades</b></p> <p>Only grade levels that are available in the school calendar selected in the Campus toolbar are available for selection. Or, leave the selection at All Students to generate eTranscripts for all students.</p> <p>Selecting All Students is <b>NOT recommended</b> for performance purposes, unless using the Submit to Batch option for generating the report.</p> <p>Note that only the primary school of record can send eTranscripts.</p>
	<p><b>Ad hoc Filter</b></p> <p>Only those students included in the filter will be returned on the report. Filters are created in the <a href="#">Filter Designer</a>.</p>
	<p><b>Enrollment Effective Date</b></p> <p>Filter the student set to only those students who are actively enrolled as of the entered date. This date only applies to the student selection when choosing a grade level.</p>
	<p><b>Student Search</b></p> <p>Search for specific students using <b>Last Name, First Name, Grade Level</b> or <b>Student Number</b> (school-assigned student number).</p> <p>At least one letter must be entered when searching for last name and first name. The complete student number must be entered in order for results to return.</p> <p>The Enrollment Effective Date entry does not apply to the student search; both active and inactive students can be found when using the student search.</p>
<p><b>Report Generation</b></p>	<p>Use the <b>Generate Report</b> button to display the results of the report immediately. Use the <b>Submit to Batch</b> button to download a large quantity of eTranscripts. See the <a href="#">Batch Queue</a> article for more information.</p> <p>If you are generating eTranscripts for more than ten students, consider using the Submit to Batch button.</p>

# Generate eTranscript Reports

## Using Grade or Ad hoc Filter Options

1. Select the appropriate eTranscript report from the **Report** dropdown list.
2. Determine how students should be selected, by **Grade level** or by **Ad hoc Filter**.
3. Enter an **Enrollment Effective Date**.
4. Click the **Generate Report** button or **Submit to Batch** button.

## Using Search for Students Option

1. Select the appropriate eTranscript report from the **Report** dropdown list.
2. Choose the **Search for Students** radio button.
3. Enter the desired search criteria (last name, first name, grade level or student number).
4. Click the **Search** button. Matching results display in the left hand box.
5. Select the students by highlighting their name and click the right-facing arrow. This moves the student name to the right hand box. Once the student's name is selected and moved to the right, the name no longer displays in the Results List (left hand box). Click the left-facing arrow to move the student's name back to the left hand box. Only the student names in the Selected List (right hand box) are included in the report.
6. Click the **Generate Report** button or **Submit to Batch** button.

The eTranscript Report displays in XML format. See the [PESC XML Output for eTranscripts](#) for more information.

```

<?xml version="1.0" encoding="UTF-8" standalone="true"?>
- <arb:AcademicRecordBatch xmlns:arb="urn:org:pesc:message:AcademicRecordBatch:v1.0.0"
  xmlns:ns3="urn:org:pesc:core:CoreMain:v1.3.0" xmlns:ns2="urn:org:pesc:message:HighSch
- <ns2:HighSchoolTranscript>
  - <TransmissionData>
    <DocumentID>2016-08-29T11:00:14.192-04:00</DocumentID>
    <CreatedDateTime>2016-08-29T11:00:14.191-04:00</CreatedDateTime>
    <DocumentTypeCode>InstitutionRequest</DocumentTypeCode>
    <TransmissionType>Original</TransmissionType>
  - <Source>
    - <Organization>
      <CEEBACT>999999</CEEBACT>
      - <LocalOrganizationID>
        <LocalOrganizationIDCode>888888</LocalOrganizationIDCode>
        <LocalOrganizationIDQualifier>TN</LocalOrganizationIDQualifier>
      </LocalOrganizationID>
      <OrganizationName>Test High School</OrganizationName>
    - <Contacts>
      - <Address>
        <AddressLine>123 Street Lane</AddressLine>
        <City>Town</City>
        <StateProvinceCode>TN</StateProvinceCode>
        <PostalCode>12345</PostalCode>
      </Address>
      - <Phone>
        <AreaCityCode>865</AreaCityCode>
        <PhoneNumber>5949999</PhoneNumber>
      </Phone>
      - <FaxPhone>
        <PhoneNumber>8655949999</PhoneNumber>
      </FaxPhone>
    </Contacts>
    </Organization>
  </Source>
- <Destination>

```

*Sample eTranscript XML*

When using the **Submit to Batch** option, the Batch Queue list of reports displays which reports have been submitted. The following four statuses display:

- **Queued** - the submitted batch is waiting to process
- **Processing** - the submitted batch is currently being processed
- **Completed** - the submitted batch has finished processing and the user can get the report and/or release the XML file
- **Sending** - the submitted batch has processed and is being sent to the vendor

- **Released** - the user has electronically submitted the batch to their vendor of choice; the date and time of release displays
- **Error** - the submitted batch could not complete the sending process due to an issue in the file (missing required fields, etc.).

Completed and released reports display a **Get the report** link in the **Download** column. This displays the generated report in XML format.

The screenshot shows a 'Batch Queue' interface with a table of reports. The table has columns for 'Queued Time', 'Report Title', 'Status', 'Download', and 'Electronic Release'. Two reports are listed: 'Emerson High School - 2017-08-01' (Completed) and 'Franklin High School - 2017-07-27' (Released). The 'Download' column for the 'Released' report contains a 'Get the report' link. A modal window displays the XML content of the report, including fields like DocumentID, CreatedDateTime, DocumentTypeCode, and OrganizationName.

Queued Time	Report Title	Status	Download	Electronic Release
08/01/2017 11:10:24 AM	Emerson High School - 2017-08-01	Completed	Get the report	Release
07/27/2017 12:26:11 PM	Franklin High School - 2017-07-27	Released	Get the report	07/27/2017 12:45:50 PM

```

<?xml version="1.0" encoding="UTF-8" standalone="true"?>
- <arb:AcademicRecordBatch xmlns:arb="urn:org:pecsc:message:AcademicRecordBatch:v1.0.0"
  xmlns:ns3="urn:org:pecsc:core:CoreMain:v1.3.0" xmlns:ns2="urn:org:pecsc:message:HighSchoolTranscript">
  - <ns2:HighSchoolTranscript>
    - <TransmissionData>
      <DocumentID>2016-08-29T11:00:14.192-04:00</DocumentID>
      <CreatedDateTime>2016-08-29T11:00:14.191-04:00</CreatedDateTime>
      <DocumentTypeCode>InstitutionRequest</DocumentTypeCode>
      <TransmissionType>Original</TransmissionType>
    - <Source>
      - <Organization>
        <CEEBACT>999999</CEEBACT>
        - <LocalOrganizationID>
          <LocalOrganizationIDCode>888888</LocalOrganizationIDCode>
          <LocalOrganizationIDQualifier>TN</LocalOrganizationIDQualifier>
        </LocalOrganizationID>
        <OrganizationName>Test High School</OrganizationName>
      - <Contacts>
        - <Address>
          <AddressLine>123 Street Lane</AddressLine>
          <City>Town</City>
          <StateProvinceCode>TN</StateProvinceCode>
          <PostalCode>12345</PostalCode>
        </Address>
      </Contacts>
    </Organization>
  </Source>
  </TransmissionData>
  </ns2:HighSchoolTranscript>
</arb:AcademicRecordBatch>
  
```

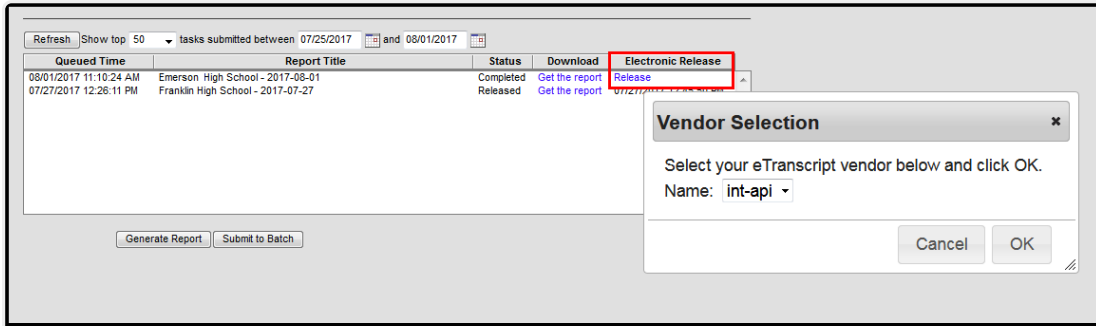
Batch Queue - Download saved reports

## Release XML eTranscript to Vendor

In order to use this option, a vendor must be set up on the [Electronic Release Setup](#) tab.

*This process requires at least **R(ead) rights** to the **Electronic Release** subright of the **eTranscript Batch report** and **R(ead) rights** to the **Electronic Release Setup**. See the recommended [eTranscript Tool Rights](#) for more information.*

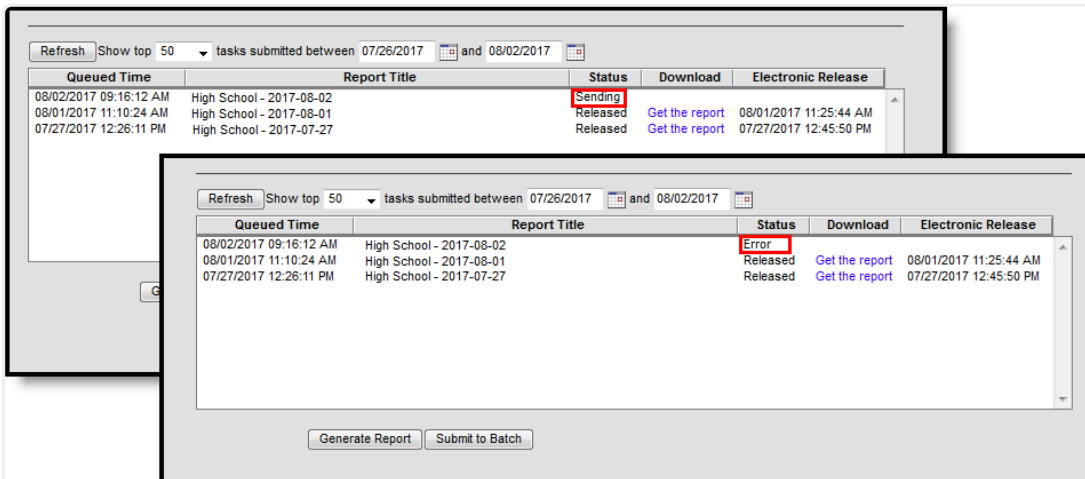
Once a report has completed, the report can be released. Click the **Release** option in the Batch Queue editor. Select the correct **eTranscript vendor** from the Name dropdown list and click **OK**. The eTranscript vendor is created and access to the vendor's API is configured in the [Electronic Release Setup](#) tool.



Vendor Selection to Release eTranscripts

A popup message indicating electronic release has initiated displays. Click **OK**. When a date and time display in the Electronic Release column, the eTranscripts that were generated have been released.

The Status column changes to **Sending**, and when it has sent, changes to **Released**. If there is an issue with the sending of the batch file, the status of **Error** displays. An error occurs when there are missing values in the XML output for a required field, or when a connection has failed. When an error occurs, the XML batch file is not released and data is not submitted to the vendor.



Batch Queue Status Display of Sending, Error