Electronic Transcript Management System (eTMS) User Guide

FOR HIGH SCHOOLS & SCHOOL BOARDS

OCAS

What does **tomorrow** look like?

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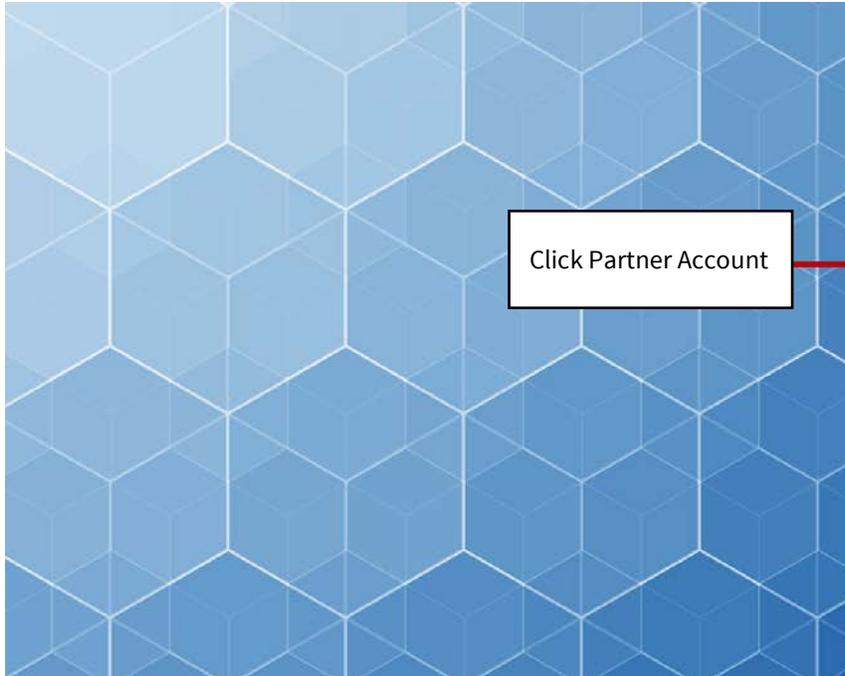
Accessing eTMS

To access eTMS, log in to the Partner Portal at: **www.ocas.ca**

Click **Log In / Register**, then **Partner Portal Login**.

You can also log in by visiting the following link: **partnerportal.ocas.ca**
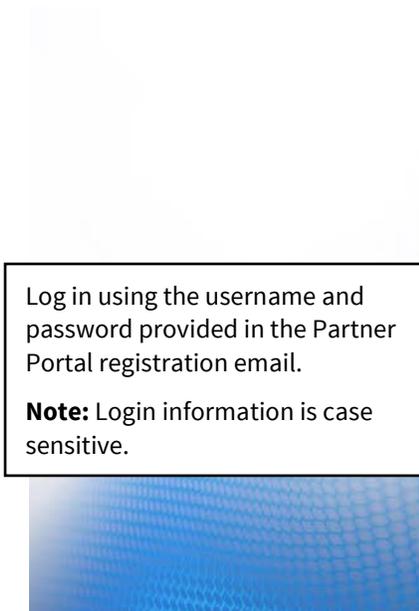
Be sure to bookmark this URL for quick one-click access.

OCAS Partner Portal / Portail de partenaires OCAS

Choose how you want to sign in / Veuillez sélectionner votre mode de connexion:

OCAS Employee Account / Compte d'employé(e) OCAS

Partner Account / Compte de partenaire

Click Partner Account

OCAS

LOG IN

Username

PARTNER\ Username

Forgot your password or username?

Password

Password

Log in using the username and password provided in the Partner Portal registration email.

Note: Login information is case sensitive.

Manage your account access with the "Forgot your password or username?" link.

Log In

Request Account

If you don't have an OCAS partner account you can request one below.

Request Account

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eTMS Features

Transcript Requests – Access all transcript requests at a board / school (board staff have access to requests for all of their schools)

Reports – Access Summary and Detailed Reports (see pages 19 & 20 for details)

Notifications – Access to customizable email notification options (see pages 21 & 22 for details)

Search – Access basic and expanded search filters (refer to pages 17 & 18 for details)

To Be Processed – View transcript requests to be processed or requiring other follow up

Incomplete – View transcript requests with an exception (e.g. Student Not Found, On Financial Hold, No Academic Data, File Upload error)

In Progress – View transcript requests currently being processed by the system

Completed – View completed or fulfilled transcript requests

Download to CSV – View all transcript request details provided by each applicant. The information can be filtered and sorted, if required.

Download to PDF – View all transcript request details provided by each applicant

eTMS

Transcript Requests | Reports | Notifications

⊞ Search

| To Be Processed | Incomplete | In Progress | Completed |

Pages: |<First <Previous 1 2 Next> Last>|
Showing 50 Items per Page. Page 1 of 2, Items 1 - 50 of 64

Download to: CSV PDF

| Date Requested ⬆ | Age | Reference Number | Name | Request Type | Date Last Attended | Send Date | Request Status | ⦿ Upload Transcript ○ Action (No Upload) |

Date Requested – Date a transcript request was paid

Age – Age of the request(s) in number of days. If a request reaches the Service Level Agreement (SLA) threshold time, it will be yellow. If a request goes beyond the SLA time, it will be red.

Reference Number – Number assigned by the system when the transcript request was initiated. Click the link to view the transcript request details.

Name – Applicant's first and last name as provided on their ontariocolleges.ca application. Click the link to view the Applicant Details page. By default, the table is sorted by Date Requested in descending order. **HINT:** Click the **Name** label to sort the table in alpha order by last name.

Request Type – Type of request

Date Last Attended – Year and month the applicant last attended high school

Send Date – Date the transcript request is to be sent (e.g. Send Transcript Now, Send End of Term)

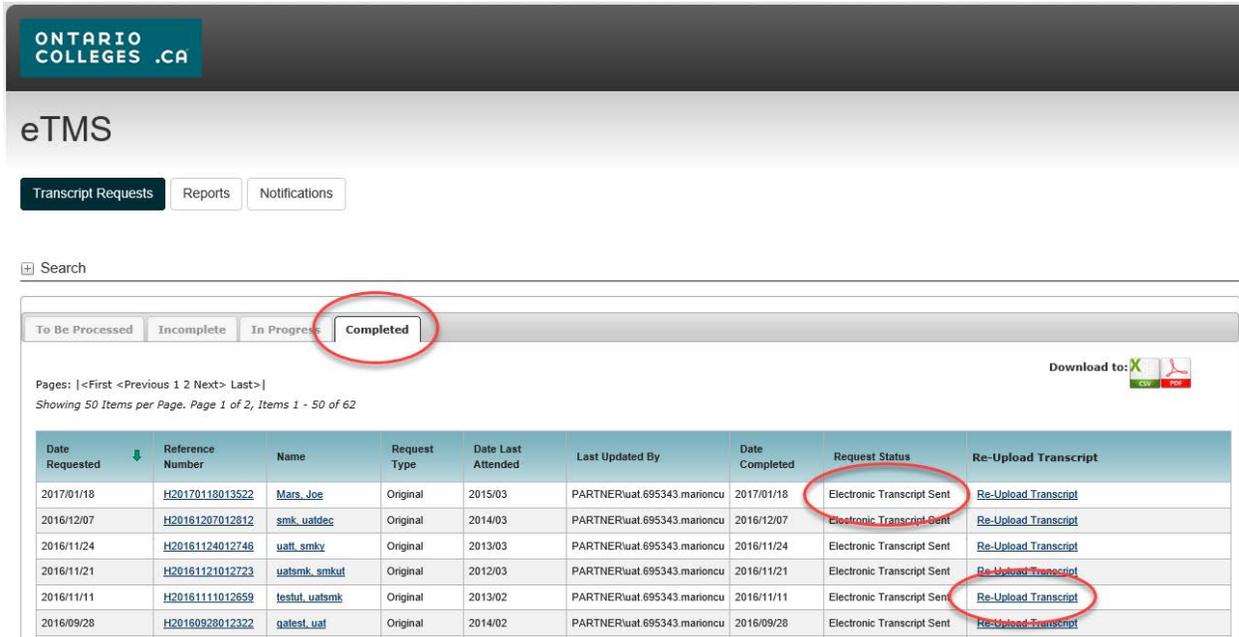**Request Status** – Status of the request

Upload Transcript – By default, the Upload Transcript option is selected and provides easy access to the Upload Transcript function

Action (No Upload) – Click this option and select the appropriate action when an electronic file (XML) cannot be uploaded

Re-Upload Transcript – Located on the **Completed** tab, an XML file can be uploaded again to eTMS

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Auto eTMS

Auto eTMS is a web service that automatically matches applicant transcript requests to student records in a board or school's Student Information System (SIS).

When a transcript request is successfully matched with information in a board / school's SIS system, an electronic transcript file is returned and automatically loaded into the eTMS system. The transcript request then moves to the Completed tab in eTMS and its status is updated to Electronic Transcript Sent.

The transcript is then sent to the applicant's college choices through a nightly transmission.

If for any reason a transcript needs to be re-sent through eTMS, the **Re-Upload Transcript** option is available to upload a new XML file.

Transcript Requests

If Auto eTMS is unable to match the information from a transcript request to a student record in a board / school's SIS system, the request will remain in the To Be Processed folder of eTMS and its status will be changed to Auto-Fulfillment Error.

If a discrepancy in the transcript request details prevents Auto eTMS from locating a matching student record, quite often it can be matched manually and an electronic transcript (XML) file of the transcript can be uploaded.

Transcript Request Details

To view **all of the details** about an individual transcript request, click the **Reference Number link**.

The Transcript Request Details page also indicates if a request could not be automatically fulfilled and the reason why.

Uploading Transcripts

Upload Transcript can be accessed in two ways – through the Reference Number link or from the eTMS main page.

Reference Number Link

The **Upload Transcript** radio button is selected by default.

Click **Browse** to locate the stored transcript file in your system. Select the file and click OK. You'll then be returned to the Transcript Request Details window and the Browse box will display the file you selected.

Next, click **Upload** to upload the transcript file to eTMS. To cancel the transaction, click the X (top right corner of page) or **Close** button (bottom of page).

NOTE: After you've successfully uploaded a transcript file from your system, eTMS remembers the last folder you selected a file from so you won't have to search for the folder again.

eTMS Main Page

The Upload Transcript radio button is selected by default. Click the **Upload Transcript** link to open the upload window.

| To Be Processed | Incomplete | In Progress | Completed |

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Download to: X CSV PDF

Date Requested ⬆	Age	Reference Number	Name	Request Type	Date Last Attended	Send Date	Request Status	◉Upload Transcript ○Action (No Upload)
2013/09/03	Past Due	H20130903001465	Bétten, Lindaouac	Original	2008/06	Send Transcript Now	Auto-Fulfillment Error	Upload Transcript
2013/09/03	Past Due	H20130903001467	Kitchingfivé, Ouac	Original	2005/06	Send Transcript Now	Auto-Fulfillment Error	Upload Transcript

Upload Window

Upload Transcript File (XML or PDF)

Reference Number	H20150317002355
Student Name:	Test User
Date of Birth	1989/04/04

If an XML transcript is available in your Student Information System, it is encouraged that you upload the XML file rather than the PDF file as processing of XML files is immediate and will be transmitted to the colleges the same day. PDF transcripts must be manually processed by Document Management at OCAS and could take up to 5 days to process.

Select Transcript File:

[   ] Browse...

[Submit] [Cancel]

Click the **Browse** button to locate the stored transcript file in your system. Select the file and click OK. You'll then be returned to the upload window and the Select Transcript File box will display the file you selected.

Click **Submit** to upload the transcript file to eTMS or click **Cancel** to cancel the transaction.

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Validation Screen

The **Transcript Request Details** validation screen displays when a mismatch occurs between the data fields. This same validation screen appears whether you upload the XML using the Reference Number link or from the Upload Transcript screen on the eTMS main page.

When you attempt to upload an XML file, the system compares the information from the transcript request to the information in the XML file you've selected. The fields used for comparison are: First Name, Surname, Date of Birth and Gender. Mismatches will be shown in red text.

TRANSCRIPT REQUEST DETAILS		
FIELD	TRANSCRIPT REQUEST	TRANSCRIPT SUBMITTED
FIRST NAME	randy	RANDY
SURNAME	rizzo	RIZZO
DATE OF BIRTH	1991/08/28	1991/08/29
GENDER	M	M
HIGH SCHOOL NUMBER	0	000060162542
OEN	000000000	948743687
HIGH SCHOOL BSID	722790	722790
DATE LAST ATTENDED	2010/02	N/A
OSSD ISSUE DATE	N/A	2010/02/02

No - Cancel and Return to Previous Screen	Yes - Save and Continue

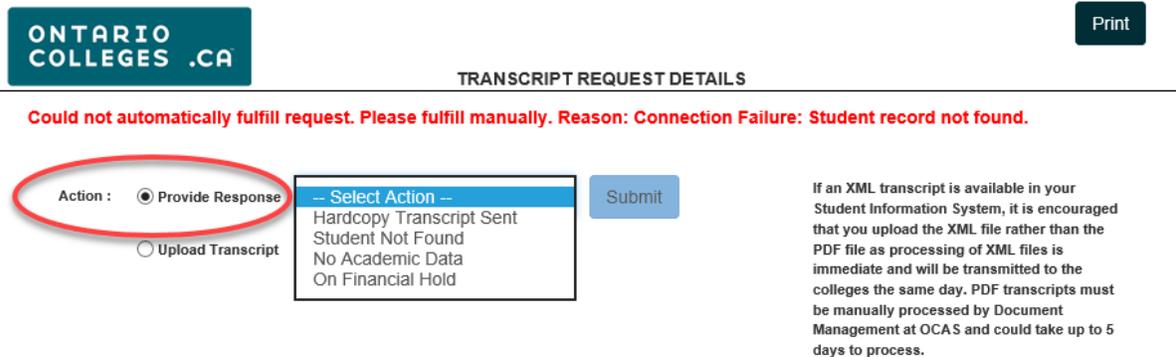When the validation screen appears, there are two options:

1. **No - Cancel and Return to Previous Screen** – Cancel the upload and return to the previous screen. See Action (No Upload) on the following page for next steps.

2. **Yes - Save and Continue** – Complete the upload for the request.

Action (No Upload)

When a board / school cannot upload a file using eTMS, the **Select Action** drop-down list can be accessed in two ways – through the Reference Number link or from the eTMS main page.

Reference Number Link

Click **Provide Response** to view and select from the drop-down list of actions.

Main Page

Click on **Action (No Upload)** to view and select from the drop-down list of actions.

Definitions

Hardcopy Transcript Sent – The transcript is only available in hardcopy format and is being sent to OCAS. The Board / school cannot locate an electronic transcript (XML file) in their Student Information System (SIS) or may have a transcript in an archive format, only. The Board / school faxes a hardcopy transcript to OCAS and sets the Request Status to Transcript Image Sent to OCAS. This informs OCAS and the applicant that a hardcopy transcript has been sent. The transcript request is then moved to the 'Completed' tab.

Student Not Found – The student's record could not be located in the Board / school's SIS system. The Request Status is updated in the application to inform the applicant that their student record could not be found. The applicant is sent an automated email with instructions to contact their Board / school. The transcript request is then moved to the 'Incomplete' tab.

No Academic Data – The student is registered at a Board / school and is found in the SIS system, but no academic data is available to send (i.e. student pre-registered only).

On Financial Hold – The transcript request is on hold due to outstanding fees owed to the Board / school by the applicant. The Request Status is updated in the application to inform the applicant that a payment is outstanding and the transcript request will not be processed. The applicant will be sent an automated email with instructions to contact the Board / school to settle the outstanding fees. The transcript request is then moved to the 'Incomplete' tab and can be further actioned at a later date.

Submit (Button) – Submit the selected response

Applicant Search

Click the +/- icon beside 'Search' to access basic search functions.

Start Date / End Date – Search for transcript requests by creation date

Application Number – Search for transcript requests by Application Number

Account Number – Search for transcript requests by Account Number

Reference Number – Search for transcript requests by Reference Number

OEN – Search for transcript requests by OEN

First Name – Search for transcript requests by First Name

Last Name – Search for transcript requests by Last Name

Search (Button) – Submit search using the entered criteria

Clear (Button) – Clear all search criteria

Advanced Search Options

Click the +/- icon next to More Search Options to access advanced search functions.

Date Last Attended – Search for requests by the date the applicant last attended high school

Show Status

☐ Select All – Search all tabs and request statuses to retrieve a result

To Be Processed – Search only within the 'To Be Processed' tab

☐ Action Required – Search for requests with 'Action Required' status

Incomplete – Search the following:

☐ File Upload Error – Search for requests with Student Not Found status

☐ On Financial Hold – Search for requests with On Financial Hold status

☐ No Academic Data – Search for requests with No Academic Data status

☐ Student Not Found – Search for requests with Student Not Found status

In Progress – Search the following:

☐ Transcript File Uploaded to OCAS – Search for requests with electronic transcript files waiting to be processed by OCAS' system

Complete – Search the following:

☐ Electronic Transcript Sent – Search for requests with electronic transcript files sent to the institutions

☐ Hardcopy Transcript Sent – Search for requests with hardcopy transcripts sent to the institutions

☐ Request Cancelled – Search for requests with electronic transcript files waiting to be processed by OCAS' system

Search (Button) – Submit search using the selected criteria

Clear (Button) – Clear all search fields

Reports

Start Date & End Date – Select request creation date criteria

Select High School (for Board users only) – Generate a report by a specific school

Clear (button) – Clear all report criteria

Run Report (button) – Generate a report based on the specified criteria

Reports – Summary & Detailed

Summary – View the status of transcript requests by date range

Detailed – View transcript request details by applicant by date range.

Notifications

eTMS

Transcript Requests | Reports | **Notifications**

Summary Notification Settings

Select the Enable Summary Notification checkbox below to be notified by email whenever there are requests that are to be processed.
Note that this configuration does not affect the request Non-Fulfillment Notifications to the requestor which are always sent immediately and cannot be turned off.

Enable Summary Notifications: ☐

Notify transcript requests fulfilled: ☐

Select a day: ☐ Sunday ☐ Monday ☐ Tuesday ☐ Wednesday ☐ Thursday ☐ Friday ☐ Saturday

Select a time: [8:00 ▾] [AM ▾]   **Time Zone:** [(GMT-05:00) Eastern Time (US & Canada) ▾]

Email: [   ]

○ Notify of Transcript Requests which are waiting to be processed for [   ] or more business hours

○ Notify of any to be processed Transcript Requests

[Clear] [Submit]

Enable Summary Notifications –Enables email notifications. Users will receive email notifications whenever there are processed or pending requests.

Notify transcript requests fulfilled (for Auto eTMS users, only) – Email sent to user to identify how many requests were fulfilled by Auto eTMS

Select a day – Select the day(s) to send email notifications

Select a time –Select the time to send email notifications

Time Zone – Select the time zone for email notifications

Email – Enter the email addresses that will receive email notifications. Use a semicolon (;) to separate each email address.

Notify of Transcript Requests which are waiting to be processed for ___ or more business hours – Set the number of hours to receive a notification for transcript requests requiring attention.

Notify of any to be processed Transcript Requests – An email will be sent as each transcript request occurs.

Clear (button) – Clear all fields and disable email notifications. Note: Changes will not be saved until the Submit button is clicked. If clicked by accident, simply close the browser and re-open the Notifications tab.

Submit (button) – Save the current email notifications configuration. Note: Click this button each time any changes are made.