Electronic Transcript Management System (eTMS) User Guide

For High Schools and School Boards





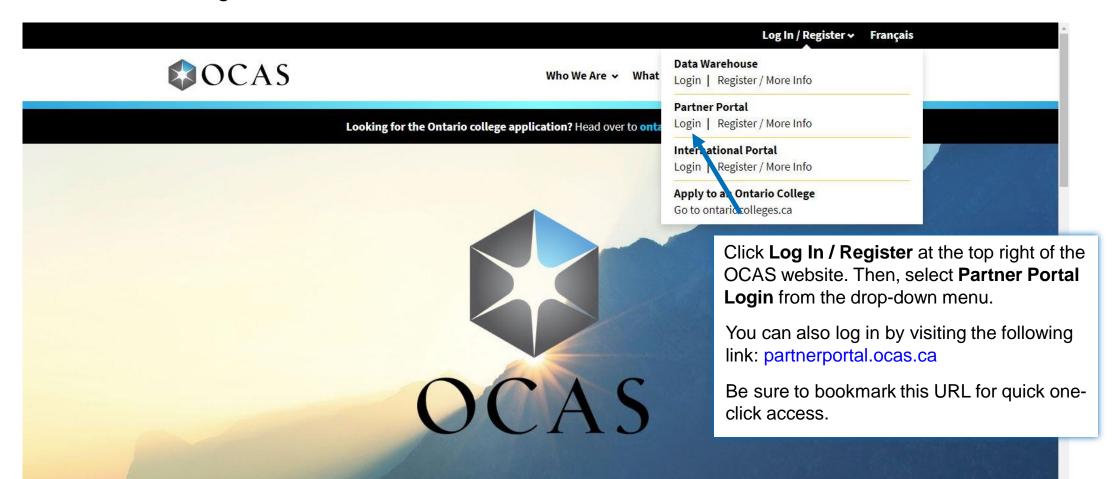
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Accessing eTMS

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





Accessing eTMS



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



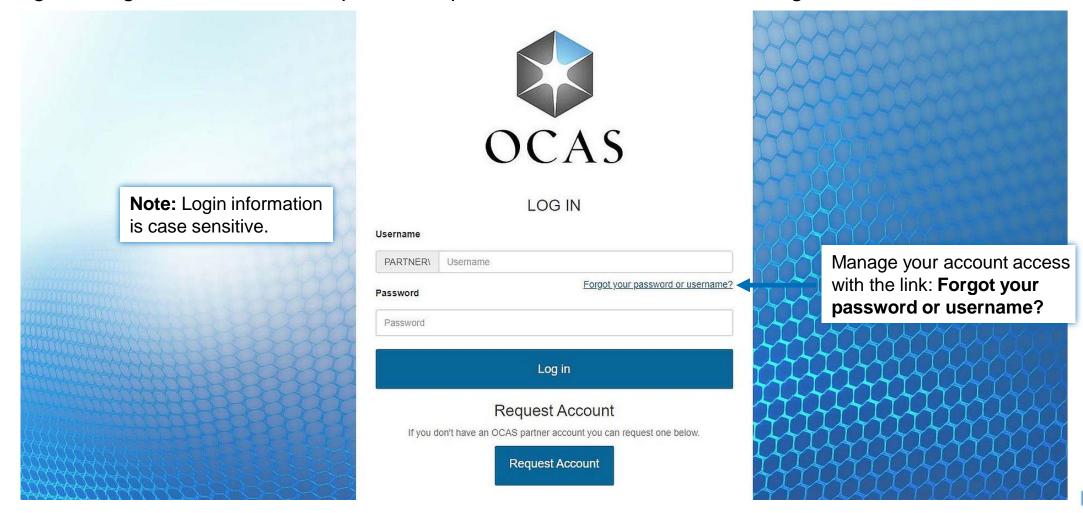
Partner Account / Compte de partenaire

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Accessing eTMS

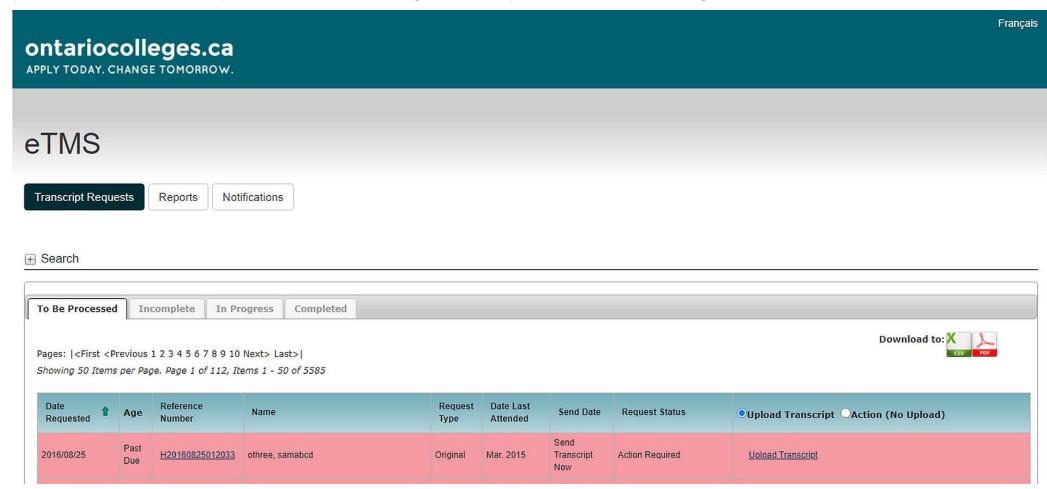
Log in using the username and password provided in the Partner Portal registration email.





Accessing eTMS – eTMS Only Users

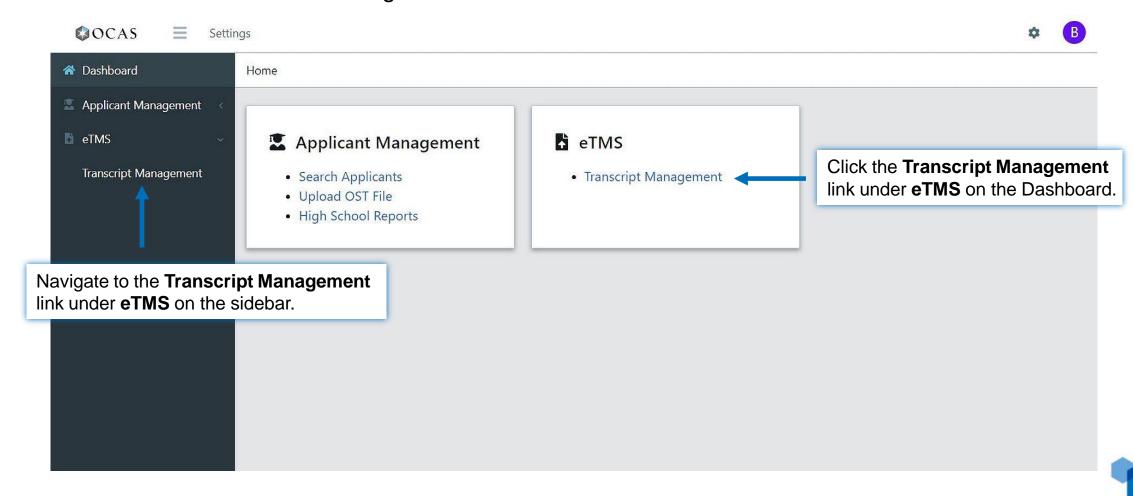
If you have eTMS only access, you will go directly to eTMS after log in.





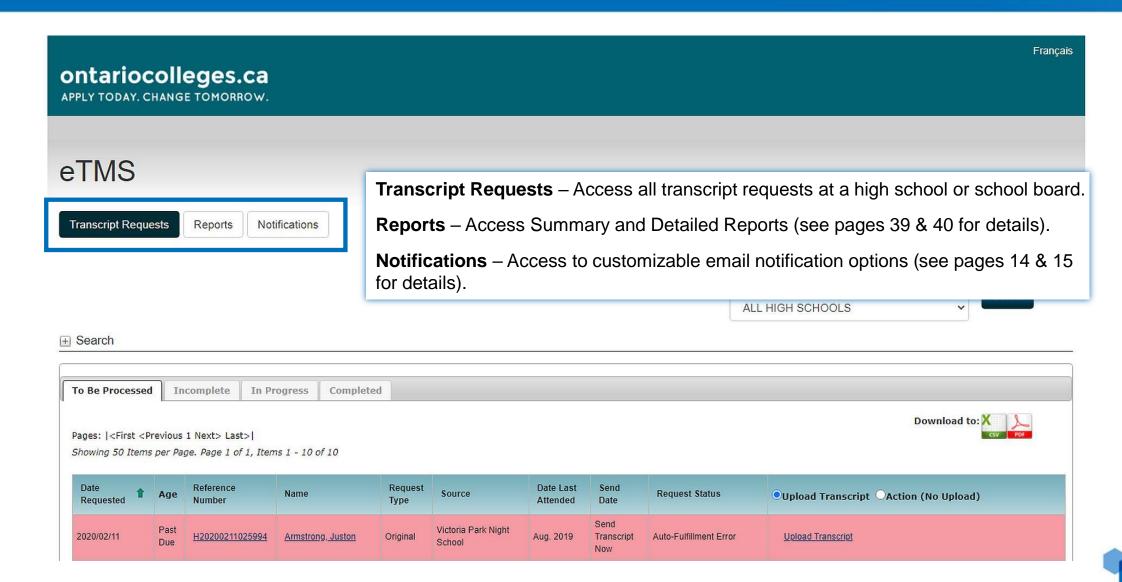
Accessing eTMS – Dashboard

If you have been granted access eTMS as well as other functions in the Portal, you will land on the Dashboard Home screen after log in. Access eTMS from the link on the Dashboard or sidebar.



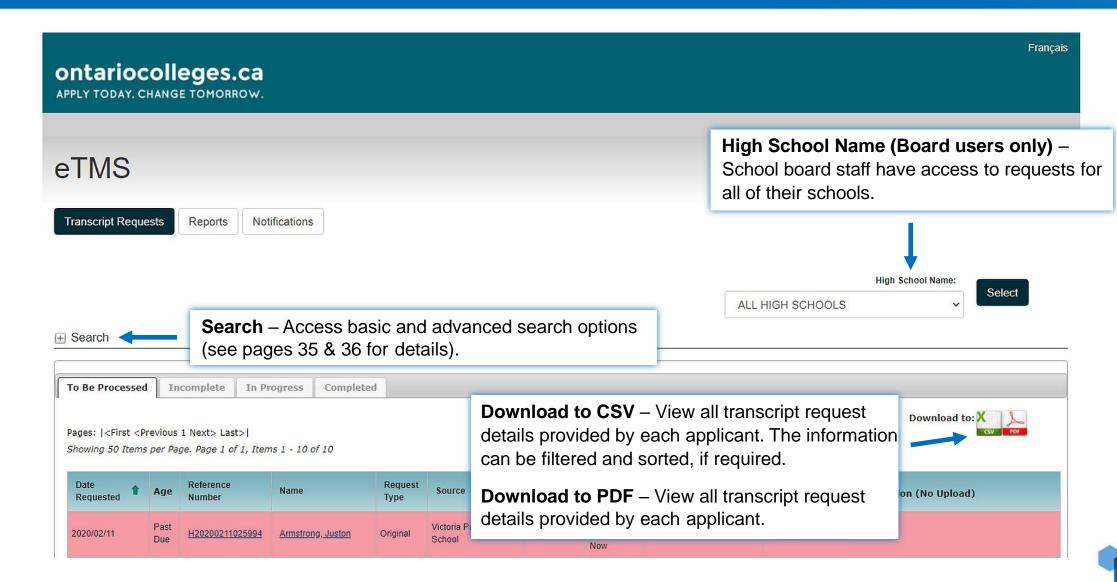


eTMS Features



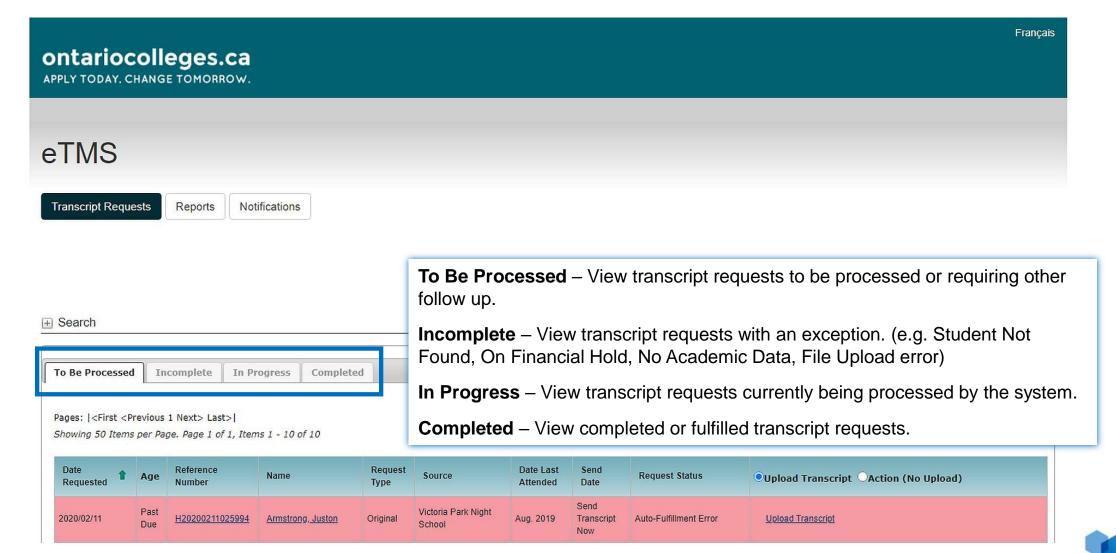


eTMS Features





eTMS Features – Tabs





eTMS Features – Request Table



Date Requested	Age	Reference Number	Name	Request Type	Source	Date Last Attended	Send Date	Request Status	OUpload Transcript OAction (No Upload)
2020/02/11	Past Due	H20200211025994	Armstrong, Juston	Original	Victoria Park Night School	Aug. 2019	Send Transcript Now	Auto-Fulfillment Error	<u>Upload Transcript</u>
2020/02/24	Past Due	H20200224026421	Pagac, Walter	Original	Valley Park Jr Hs	Dec. 2017	Send Transcript Now	Auto-Fulfillment Error	<u>Upload Transcript</u>
2020/03/05	Past Due	H20200305026778	Padberg, Alvera	Original	East Metro - Gallaway	Nov. 2017	Send Transcript Now	Auto-Fulfillment Error	<u>Upload Transcript</u>

Date Requested – Date a transcript request was paid. By default, the table is sorted by Date Requested from oldest to newest request (ascending order). Click the arrow to sort from newest to oldest.

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 Reference Number links to view the transcript request details.



eTMS Features – Request Table

Name – Applicant's first and last name as provided on their ontariocolleges.ca application. Click the name link to jump to the Applicant Details page. Hint: To sort the table in alphabetical order by last name, click the **Name** heading.

Request Type – Type of request.

Source (Board users only) – The institution that is the provider of the transcript or the source of the transcript.

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.

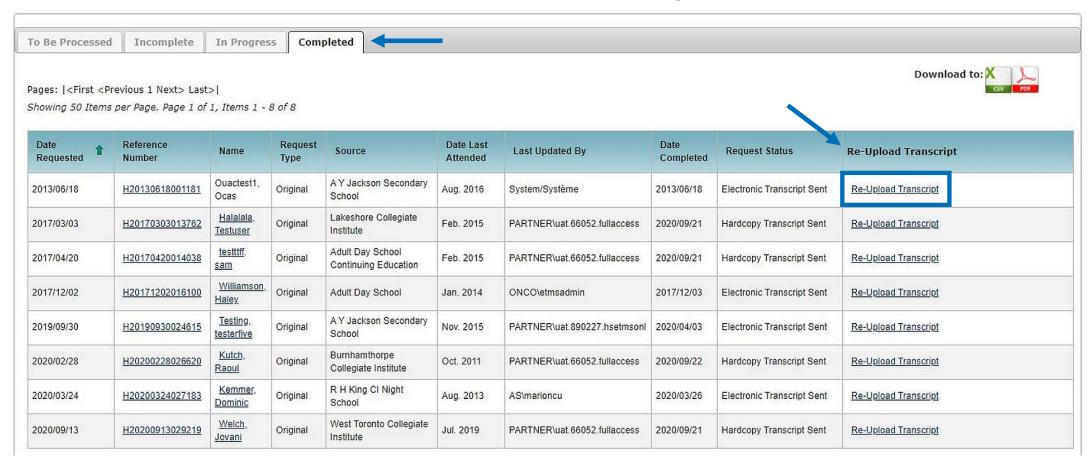
Upload Transcript – By default, the Upload Transcript option is selected and provides easy access to the Upload Transcript function.

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



eTMS Features - Re-Upload Transcript

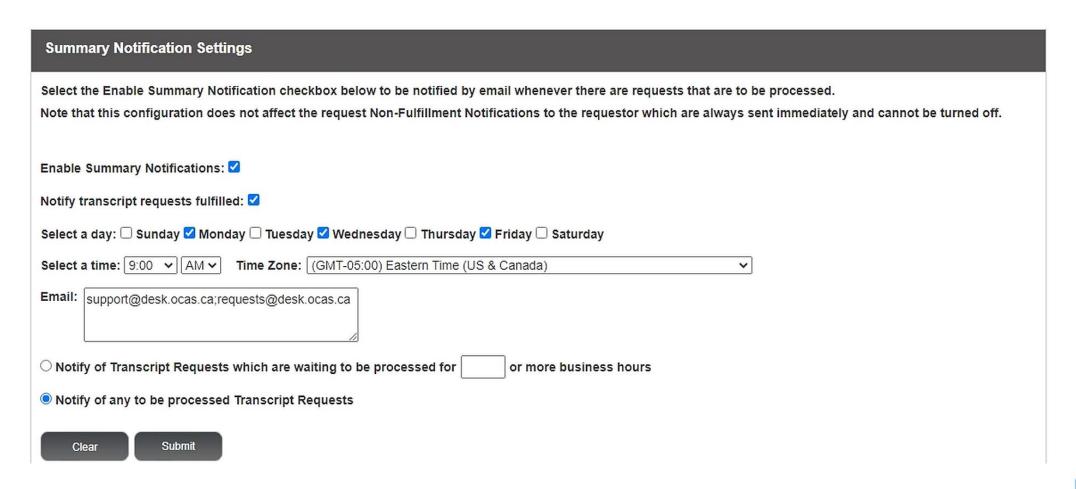
Located on the **Completed** tab, an XML file can be uploaded again to eTMS.





Notifications







Notifications

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. **Note:** The system recognizes eight business hours as equivalent to one day.

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

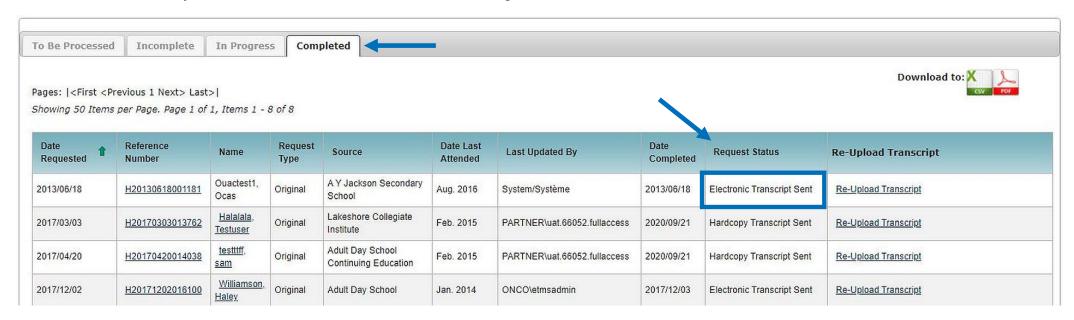
Submit – Save the current notifications settings. **Note:** Click Submit each time any changes are made.

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



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 the SIS, an electronic transcript file is returned and automatically loaded into eTMS. The transcript request then moves to the **Completed** tab in eTMS, and its status is updated to **Electronic Transcript Sent**.

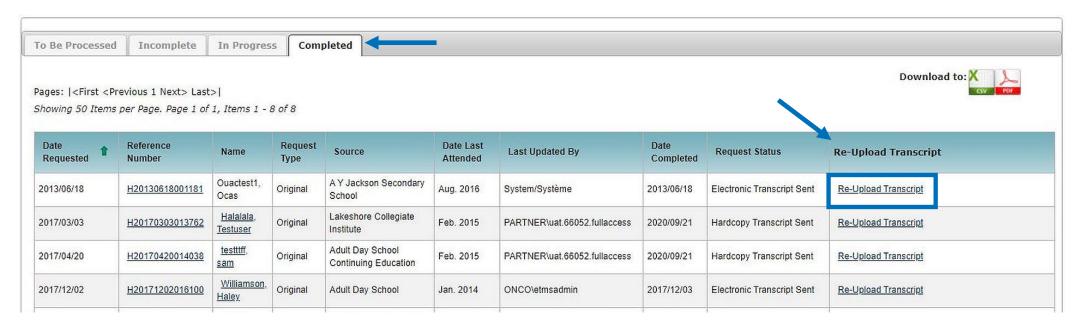


The transcript is then sent to the applicant's college choices through a nightly transmission.



Auto eTMS - Re-Upload Transcript

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



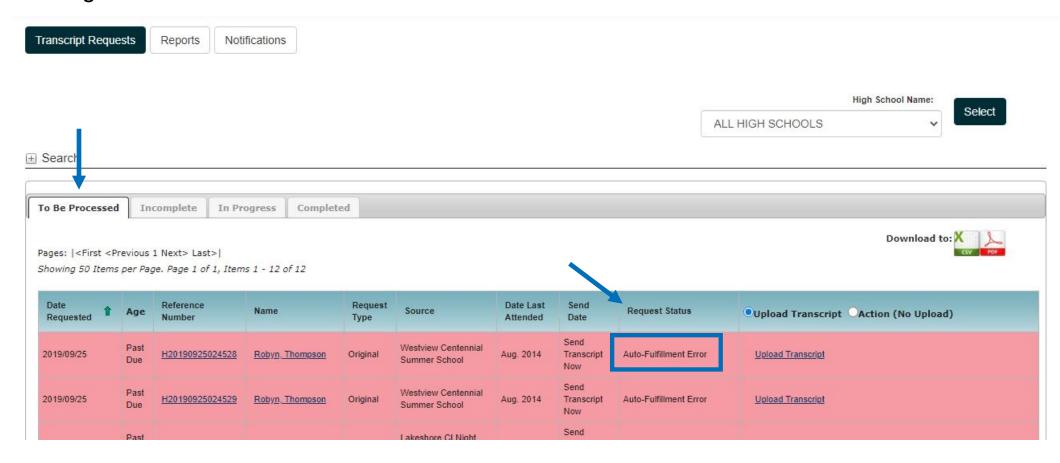
Note: If you have uploaded the wrong transcript, please use the **Re-upload Transcript** option to upload the correct one.

Please also send an email to service@ocas.ca in order for us to remove the incorrect transcript from our system.



Auto eTMS

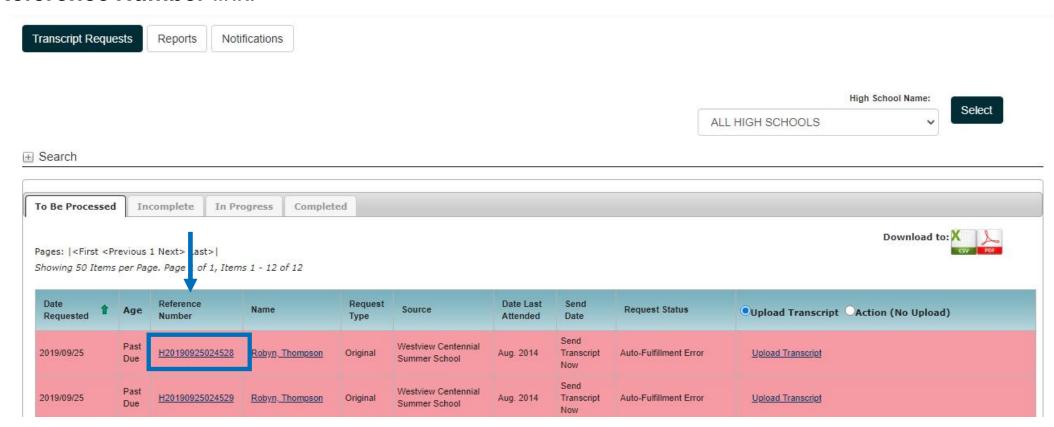
If Auto eTMS is unable to match the information from a transcript request to a student record in a board or school's SIS, the request will remain in the **To Be Processed** tab of eTMS and its status will be changed to **Auto-Fulfillment Error**.





Transcript Requests

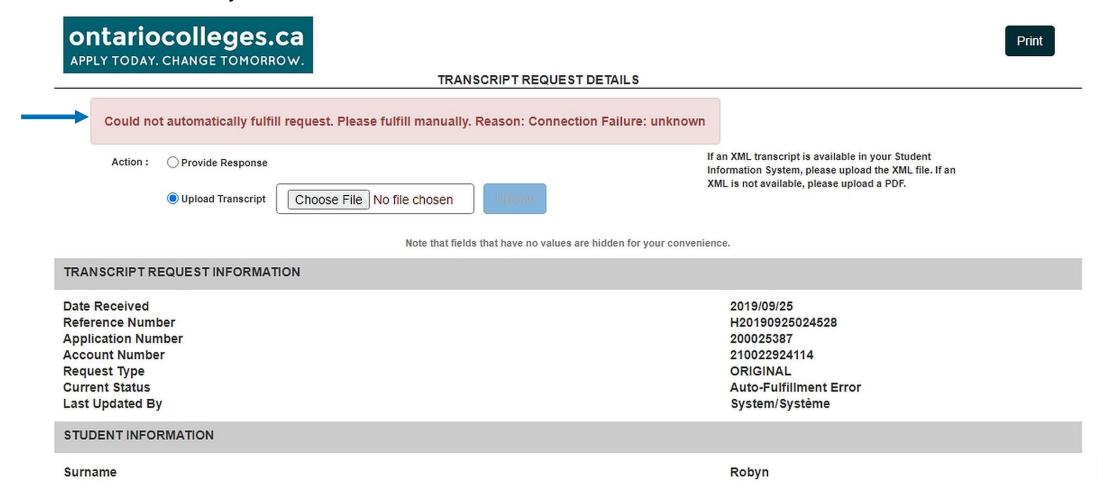
If a discrepancy in the transcript request details prevents Auto eTMS from locating a matching student record, quite often it can be matched manually, and an electronic transcript (XML) file of the transcript can be uploaded. To view all of the details about an individual transcript request, click the **Reference Number** link.





Transcript Request Details

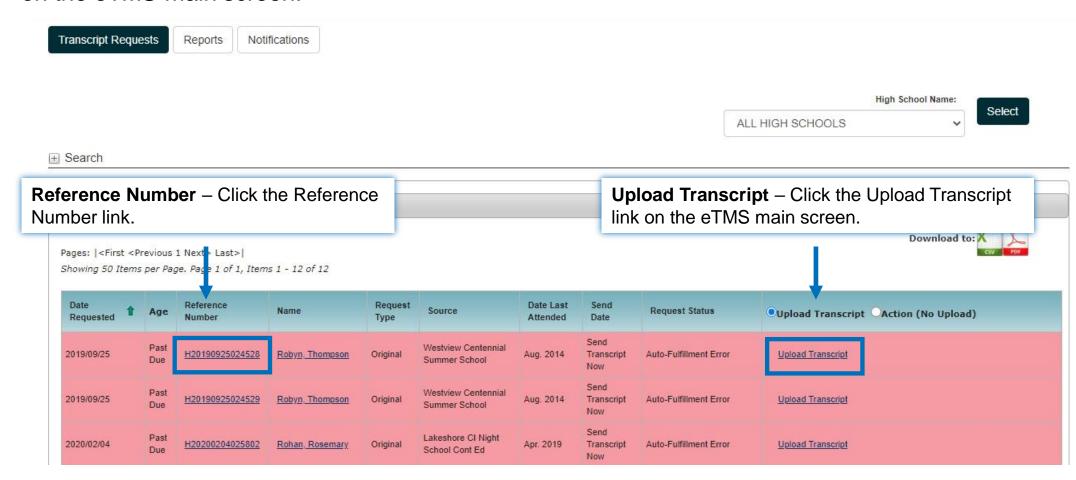
The **Transcript Request Details** window also indicates if a request could not be automatically fulfilled and the reason why.





Uploading Transcripts

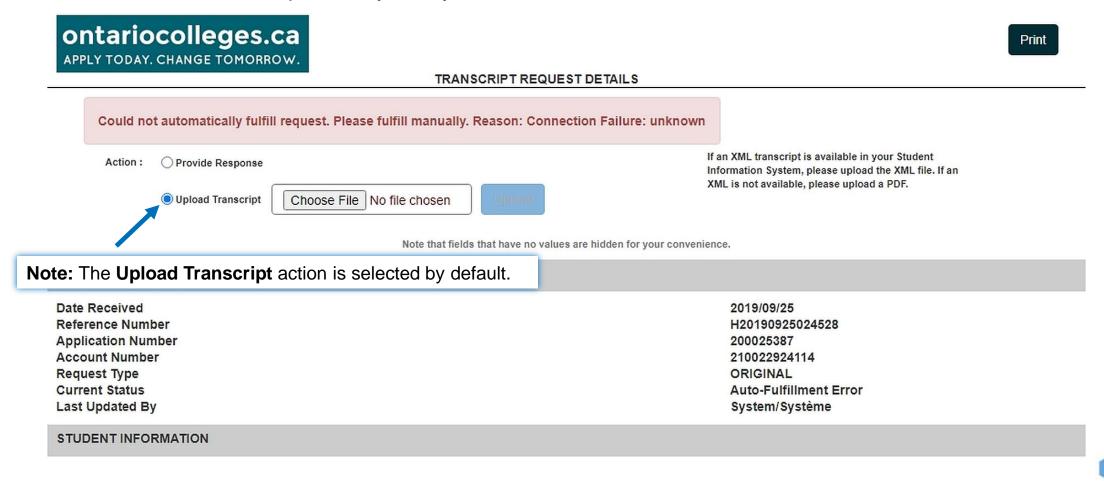
Upload Transcript can be accessed through the Reference Number link or from Upload Transcript on the eTMS main screen.





Uploading Transcripts – Reference Number Link

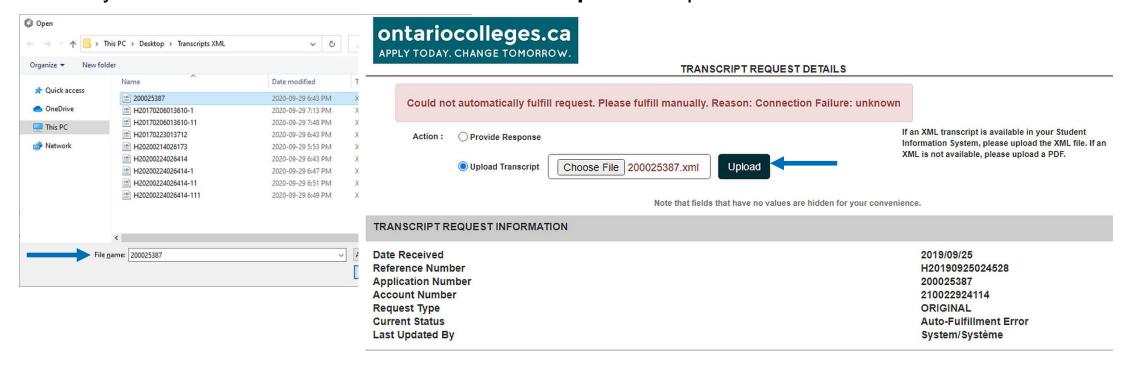
The **Reference Number** link opens the Transcript Request Details window. Click **Choose File** to locate the stored transcript file in your system.





Uploading Transcripts – Reference Number Link

Select the transcript file. You will then be returned to the Transcript Request Details window and see the file you selected in the **Choose File** box. Click **Upload** to upload the file to eTMS.



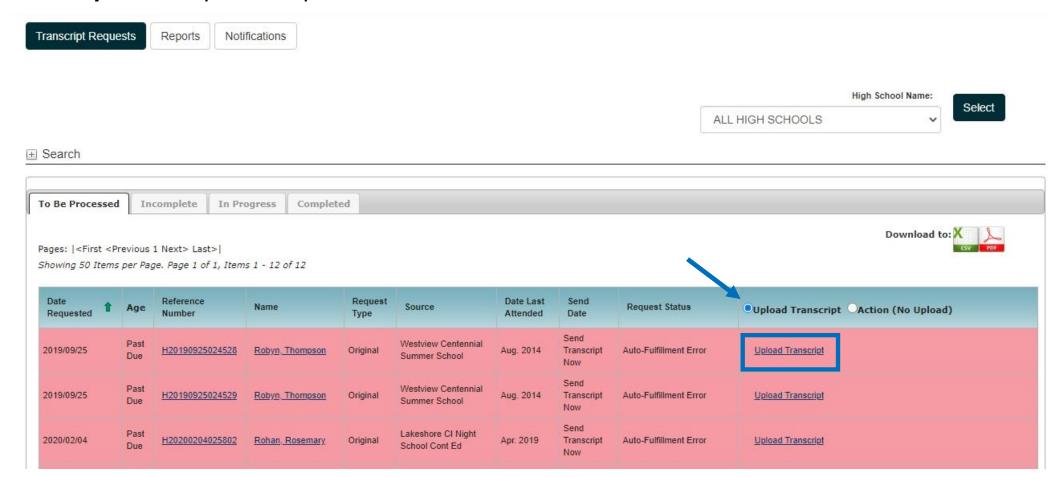
To cancel the transaction, click the X (top right of the window) or the **Close** button (bottom of page).

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



Uploading Transcripts – eTMS Main Screen

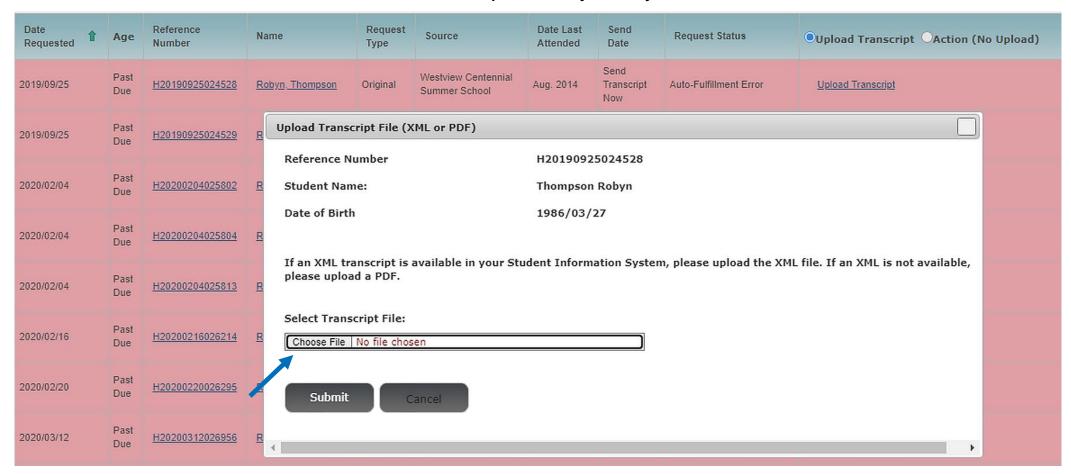
On the eTMS main screen, the **Upload Transcript** button is selected by default. Click the **Upload Transcript** link to open the upload window.





Uploading Transcripts – eTMS Main Screen

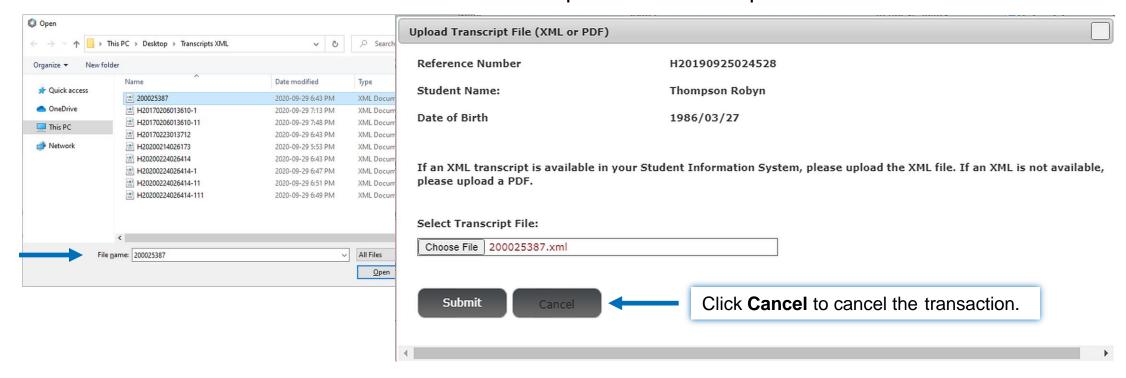
Click Choose File to locate the stored transcript file in your system.





Uploading Transcripts – eTMS Main Screen

Select the transcript file. You will then be returned to the upload window and see the file you selected in the **Choose File** box. Click **Submit** to upload the transcript file to eTMS.





Validation Screen

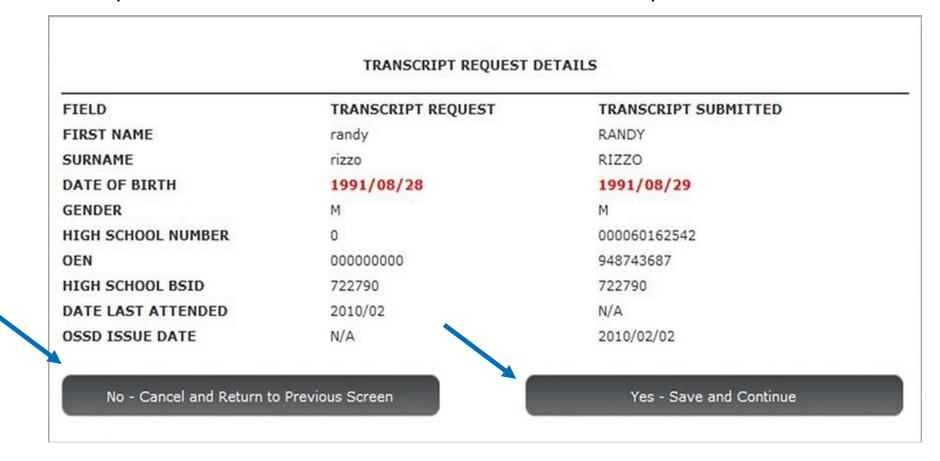
The system compares the information from the transcript request to the information in the XML file. The **Transcript Request Details** validation screen appears when a mismatch occurs between data fields in the request and the XML file you are attempting to upload. The fields used for comparison are **First Name**, **Surname**, **Date of Birth**, and **Gender**.

FIELD	TRANSCRIPT REQUEST	TRANSCRIPT SUBMITTED	70	
FIRST NAME	randy	RANDY		
SURNAME	rizzo	RIZZO	Minnestalenan	
DATE OF BIRTH	1991/08/28	1991/08/29	Mismatches are shown in red tex	
GENDER	M	М		
HIGH SCHOOL NUMBER	0	000060162542		
DEN	000000000	948743687		
HIGH SCHOOL BSID	722790	722790		
DATE LAST ATTENDED	2010/02	N/A		
OSSD ISSUE DATE	N/A	2010/02/02		



Validation Screen – Options

The validation screen appears whether you upload the XML using the Reference Number link or the Upload Transcript link from the eTMS main screen. You have the option to cancel or save the upload.





Validation Screen – Options

If you wish to Cancel the upload, select No - Cancel and Return to Previous Screen.

See Action (No Upload) on page 30 for next steps.

If you wish to save, select Yes - Save and Continue to complete the upload for the request.

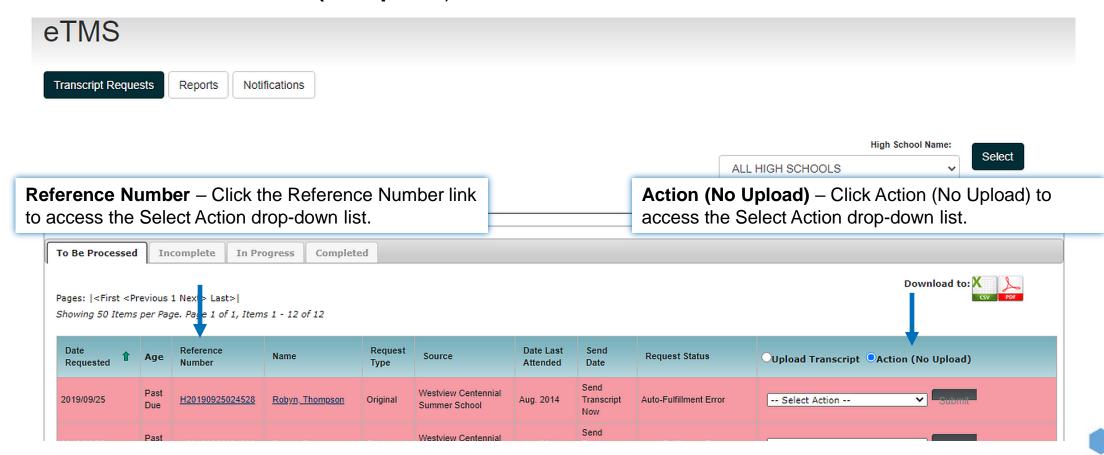
Note: If you have uploaded the wrong transcript, please use **Re-Upload Transcript** to upload the correct one.

Please send an email to service@ocas.ca in order for us to remove the incorrect transcript from our system.



Action (No Upload)

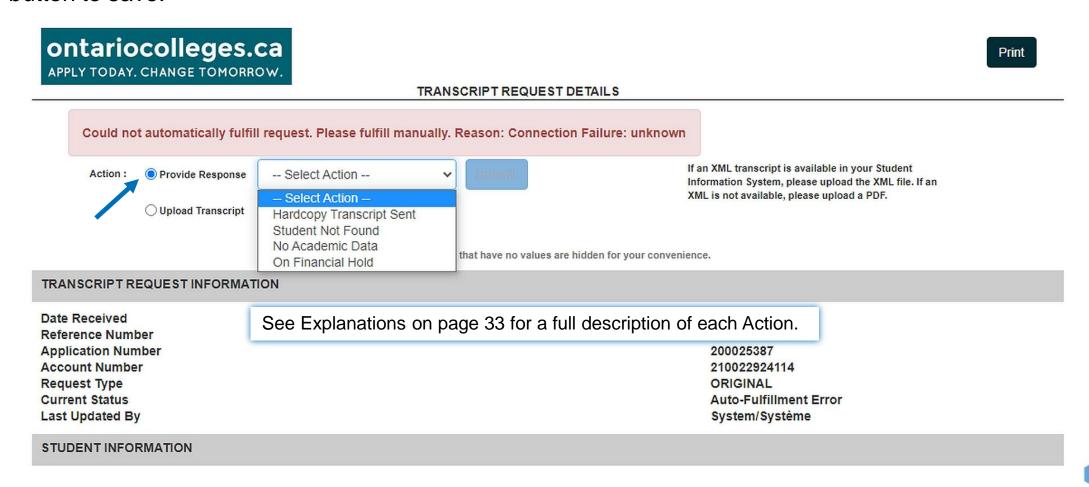
When you cannot upload a file using eTMS, you can chose an alternative action from the **Select Action** drop-down list. You can access the Select Action drop-down list through the **Reference Number** link or from **Action (No Upload)** on the eTMS main screen.





Action (No Upload) - Reference Number Link

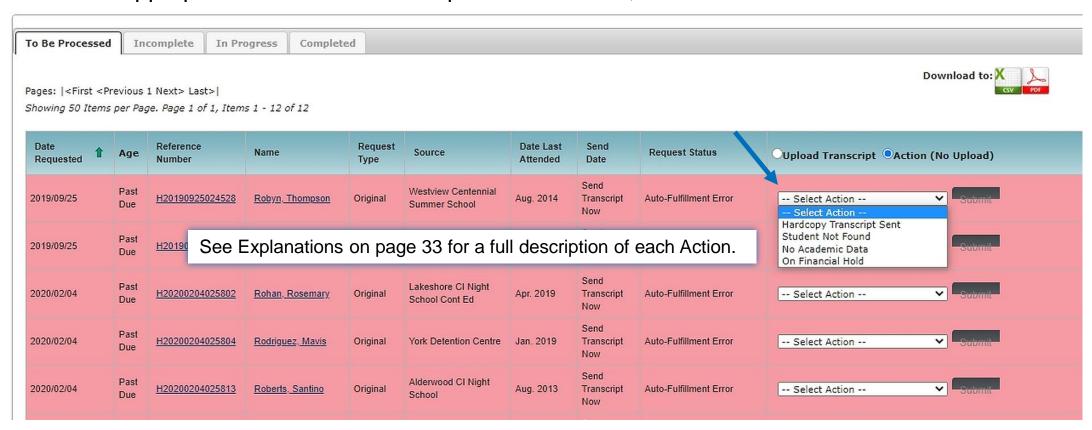
Click **Provide Response** to view and select from the drop-down list of actions. Then, click the **Submit** button to save.





Action (No Upload) – eTMS Main Screen

Select the appropriate action from the drop-down list. Then, click the **Submit** button to save.





Action (No Upload) – Explanations

Hardcopy Transcript Sent – The transcript is only available in hardcopy format and is being sent to OCAS. The Board or school cannot locate an electronic transcript (XML file) in their Student Information System (SIS) or PDF, and may have a transcript in an archive format only.

The Board or school can email a PDF to service@ocas.ca, mail or fax a hardcopy transcript to OCAS, and then sets the Request Status to **Hardcopy Transcript Sent.** 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 or school's SIS. 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 or school. The transcript request is then moved to the **Incomplete** tab.

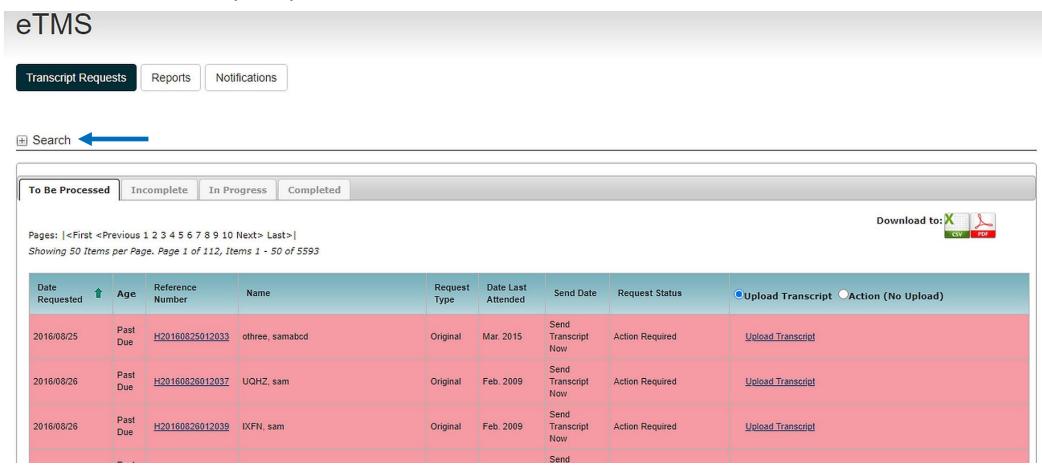
No Academic Data – The student is registered at a Board or school and is found in the SIS, but no academic data is available to send (i.e. student pre-registered only).

On Financial Hold – The transcript request is on hold due to outstanding fees owed to the Board or 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 or 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.



Applicant Search

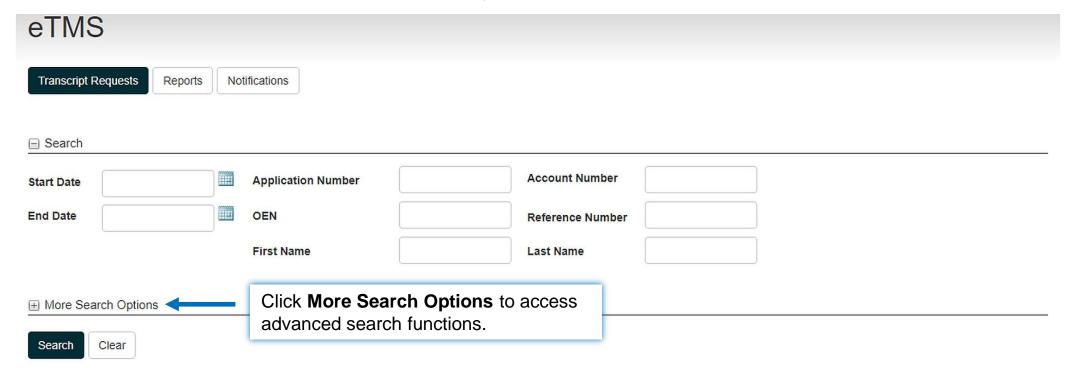
To search for a transcript request, click **Search** to access basic search functions.





Applicant Search – Basic Search

You can search for transcript requests by creation date (Start Date / End Date), Application and Account numbers, Ontario Education Number (OEN), Reference Number, and the applicant's name. Click Search to perform the search based on your criteria or Clear to clear all fields.





Applicant Search – Advanced Search

You can perform an advanced search using More Search Options.

Date Last Attended		То			
Show Status: To Be Processed: Incomplete: In Progress: Complete:	☐ Select All ☐ Action Required ☐ File Upload Error ☐ Transcript File Upload ☐ Electronic Transcrip		☐ On Financial Hold☐ Hardcopy Transcript Sent	□ No Academic Data□ Request Cancelled	☐ Student Not Found
Search					
To Be Processed	Incomplete In Progr	ress Comple	ted		

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.



Applicant Search – Advanced Search

To Be Processed: Action Required – Search for requests only within the To Be Processed tab with Action Required status.

Incomplete – Search within the Incomplete tab for the following request statuses: File Upload Error, On Financial Hold, No Academic Data, and Student Not Found

In Progress: Transcript File Uploaded to OCAS – Search within the In Progress tab for requests with electronic transcript files waiting to be processed by OCAS' system.

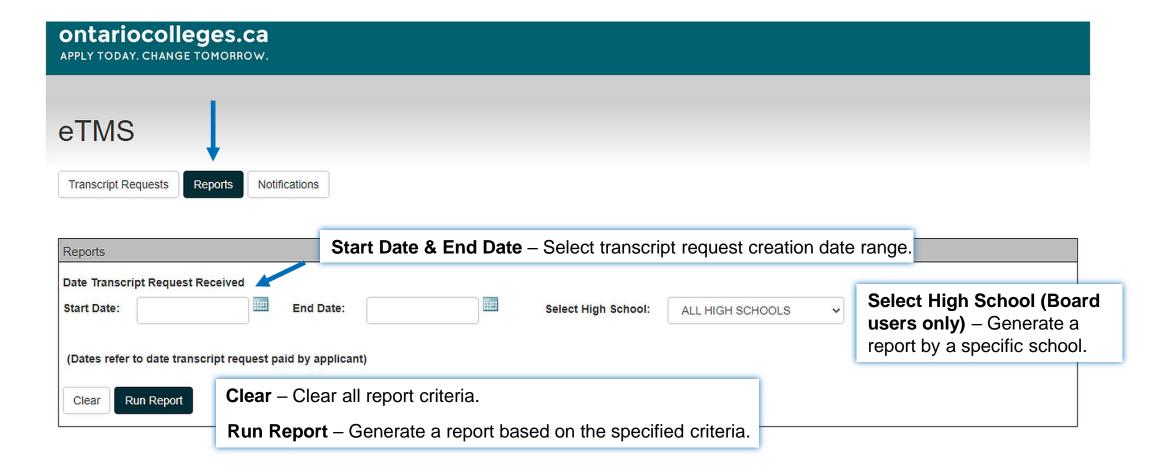
Complete – Search within the Complete tab for the following request statuses:

Electronic Transcript Sent – Requests with electronic transcript files sent to the institutions.

Hardcopy Transcript Sent – Requests with hardcopy transcripts sent to the institutions.

Request Cancelled – Requests that have been cancelled by OCAS.





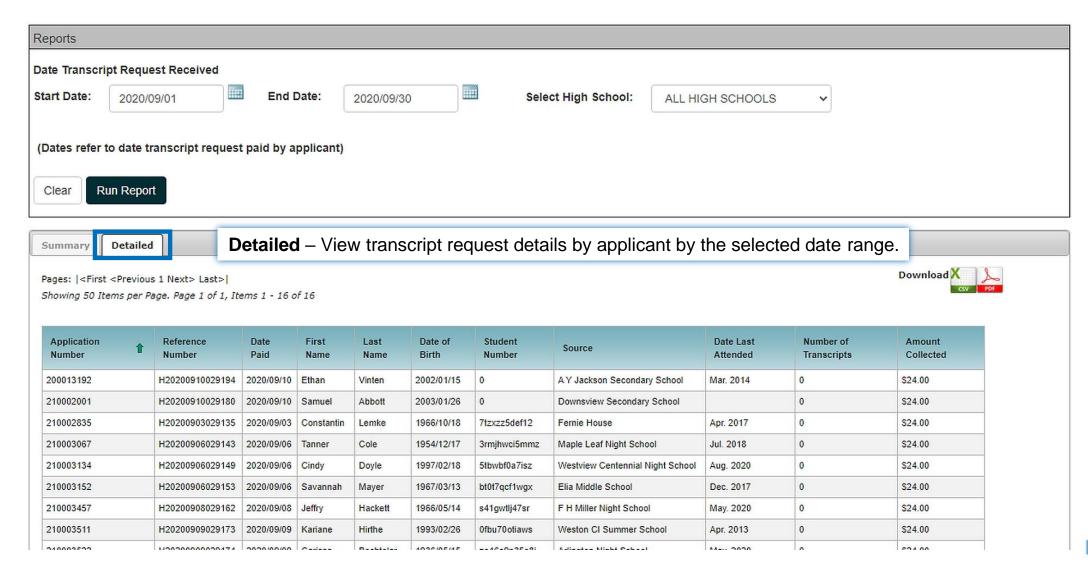


Reports – Summary

Reports									
Date Transcript Request Received									
Start Date: 2020/09/01	End Date: 2020/09/30 Sel	ect High School: ALL HIGH SCHOOL	DLS 🗸						
(Dates refer to date transcript request paid	(Dates refer to date transcript request paid by applicant)								
Clear Run Report									
Summary Detailed Summa	${f ry}$ – View the status of transcript ${f r}$	equests by the selected d	ate range.						
			Download X 🛴						
Date Range: 2020/09/01 to 2020/09/30			CSV POF						
Total Transcript Requests	Original Transcript Requests	Re-Issue Transcript Requests							
To Be Processed	15	0							
Action Required	0	0							
Auto Fulfillment Error	15	0							
Incomplete	0	0							
On Financial Hold	0	0							
Student Not Found	0	0							
No Academic Data	0	0							
File Upload Error	0	0							
In Progress	0	0							
Completed	1	0							



Reports – Detailed



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