eTranscript Batch

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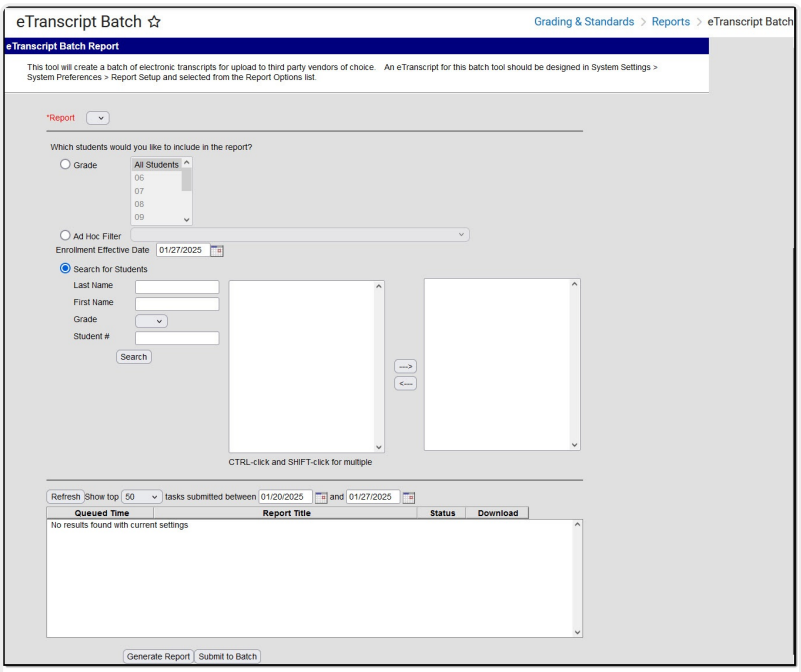
Path: Grading & Standards > Reports > eTranscript Batch

Use the **eTranscript Batch** tool to generate eTranscripts for multiple students and prepare them for submission to a supported third-party vendor. Generating eTranscripts in the Batch tool is Step 11 of the eTranscript Workflow. This guide explains how to generate eTranscripts using grade levels, Ad hoc Filters, or student search results.

For information about the complete eTranscript process, see the eTranscript Workflow.

Before you start

- Create an eTranscript report in Report Setup. A report must exist before eTranscripts can be generated.
- Create a student-based Ad hoc Filter if you plan to select students using a filter. Only Student Data Type filters are available.
- Only the primary school of record can send eTranscripts.
- Determine whether students will be selected by grade level, Ad hoc Filter, or individual student search.
- Students excluded from eTranscript output:
  - No Show enrollments
  - Enrollment Start Date > today (future-dated enrollments)
  - Enrollment Service Type of S or N
- Set appropriate tool rights. Refer to the Grading & Standards Reports Tool Rights article.



Configure, generate, and track batch eTranscript requests for selected students.

Generate eTranscripts using grade levels or an Ad hoc Filter

Use this option when generating eTranscripts for a group of students.

1. Select an eTranscript report from the **Report** dropdown list.
2. Select students using one of the following methods:
    - Select one or more **Grade Levels**.
    - Only grade levels available in the school calendar selected in the Campus toolbar are available for selection. Alternatively, you can leave the selection at All Students to generate eTranscripts for all students.
    - Selecting All Students i**s NOT recommended** for performance purposes unless you use the Submit to Batch option to generate the report.
    - Only the primary school of record can send eTranscripts.
    - Select an **Ad hoc Filter**.
        - Results may differ from those generated by the eTranscripts tool because Ad hoc Reporting does not apply the same business rules, validation criteria, or eligibility requirements used during eTranscript creation.
3. Enter an **Enrollment Effective Date**.
4. Click **Generate Report** or **Submit to Batch.** Use Batch Queue when generating eTranscripts for a large number of students. For batches containing more than ten students, Batch Queue is recommended to improve performance.

Impact

The eTranscript report is generated in XML format or is submitted for background processing and becomes available in the Batch Queue when processing is complete. The report includes only students who meet eTranscript eligibility requirements.

Generate eTranscripts by searching for students

Use this option when generating eTranscripts for specific students.

1. Select an eTranscript report from the **Report** dropdown list.
2. Select **Search for Students**. The Enrollment Effective Date entry does not apply to the student search; active and inactive students can be found there.
3. Enter one or more search criteria :
    - Last Name
    - First Name
        - When searching for first and last names, at least one letter must be entered for each.
    - Grade Level
    - Student Number

    - The complete student number must also be entered to return the results.
4. Click **Search**.
5. Select students from the search results and click the right-facing arrow to move them to the **Selected List**.
6. Remove students from the selection, if necessary, using the left-facing arrow.
7. Click **Generate Report** or **Submit to Batch.** Use Batch Queue when generating eTranscripts for a large number of students. For batches containing more than ten students, Batch Queue is recommended to improve performance.

Impact

The eTranscript report is generated in XML format or is submitted for background processing and becomes available in the Batch Queue when processing is complete. The report includes only students listed in the **Selected List**.

Troubleshooting

Students expected in the report do not appear

The following students are automatically excluded from eTranscript output:

- Students with No Show enrollments.
- Students with future-dated enrollments (Enrollment Start Date is greater than today).
- Students with an Enrollment Service Type of **S** or **N**.

When selecting students using an Ad hoc Filter, results may differ from those generated by the eTranscripts tool because Ad hoc Reporting does not apply the same business rules, validation criteria, or eligibility requirements used during eTranscript creation.

Student search returns unexpected results

- At least one character must be entered when searching by first or last name.
- The complete student number must be entered when searching by student number.
- The **Enrollment Effective Date** does not apply to student searches. Both active and inactive students can appear in search results.

What's next?

- Review the generated XML output using the PESC XML Output for eTranscripts documentation to verify that student data, transcript information, and required fields are included as expected.
- Monitor the batch status in the Batch Queue to confirm the report completed successfully and, if applicable, was released to the selected vendor.
- After a batch has completed processing and an electronic release vendor has been

configured, release the eTranscripts to a vendor for electronic delivery.

- Generate additional eTranscript batches for other student populations as needed.