Electronic Transcript Management System (eTMS) User Guide

FOR COLLEGES

OCAS

What does **tomorrow** look like?

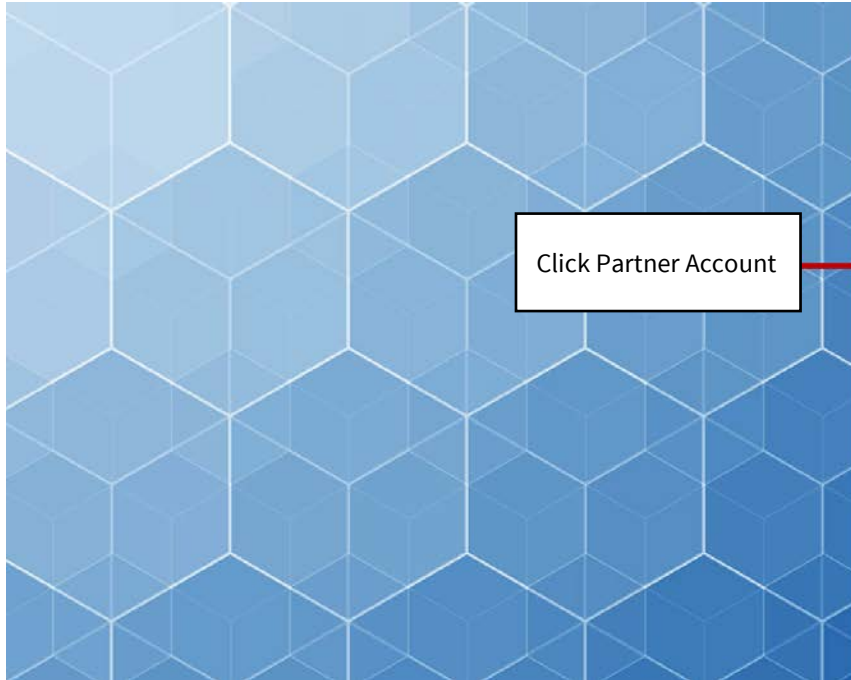# Contents

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

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

Note: Login information is case sensitive.

OCAS

LOG IN

Username

PARTNER\ Username

Forgot your password or username?

Password

Password

Log in

Request Account

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

Request Account

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

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College eTMS Features

Logout – Log out of eTMS and return to the login screen

Transcript Requests – Access all transcript requests for your college

Transcripts – Access all received electronic transcripts

Reports – Access Summary and Detailed Reports (see pages 14 & 15 for details)

Notifications – Access to customizable email notification options (see pages 16 & 17 for details)

Transcript Requests

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

Deferred – Display list of transcript requests that are currently deferred

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

Transcript Request Table

Date Requested ⬆	Age	Reference Number	Name	Request Type	Date Last Attended	Send Date	Request Status	⦿ Upload Transcript ○ Action (No Upload)
2015/11/12	Past Due	C20151112006011	Oehdk, Ljdbfl	Original		Send Transcript Now	Action Required	Upload Transcript
2016/08/26	Past Due	C20160826006788	ortwoc, sam	Original	2016/02	Send Transcript Now	Action Required	Upload Transcript
2016/11/23	Past Due	C20161123006938	Elnicki, Ashton	Original	2009/05	Send Transcript Now	Action Required	Upload Transcript
2016/11/23	Past Due	C20161123006939	Elnicki, Ashton	Original	2009/05	Send Transcript Now	Action Required	Upload Transcript
2017/01/09	Past Due	C20170109006988	Ostrom, Olivia	Original	2010/05	End Of Spring/Summer Term (By the end of Sep 2017)	Action Required	Upload Transcript
2017/02/13	Past Due	2017021300052	Nauta, John	Original	2005/01	Send Transcript Now	Action Required	Upload Transcript
2017/05/25	Past Due	C20170525007527	oronetwo, samtest	Original	2015/03	Send Transcript Now	Action Required	Upload Transcript
2017/05/25	Past Due	C20170525007528	oronetwo, samtest	Original	2015/03	Send Transcript Now	Action Required	Upload Transcript
2017/10/01	Past Due	C20171001008007	HJKSHFG, skfhjkd	Original		Send Transcript Now	Action Required	Upload Transcript
2017/10/02	Past Due	C20171002008018	bahubb, samtest	Original	2009/08	Send Transcript Now	Action Required	Upload Transcript
2018/01/09	Due	C20180109008434	vasione, samtest	Original	2014/03	Send Transcript Now	Action Required	Upload Transcript
2018/01/09	Due	C20180109008435	vasione, samtest	Original	2014/03	Send Transcript Now	Action Required	Upload Transcript
2018/01/09	Due	C20180109008438	testadd, sam	Original	2013/05	Send Transcript Now	Action Required	Upload Transcript
2018/01/09	Due	C20180109008439	testadd, sam	Original	2013/05	Send Transcript Now	Action Required	Upload Transcript

Pages: |<First <Previous 1 Next> Last>|
Showing 50 Items per Page. Page 1 of 1, Items 1 - 14 of 14

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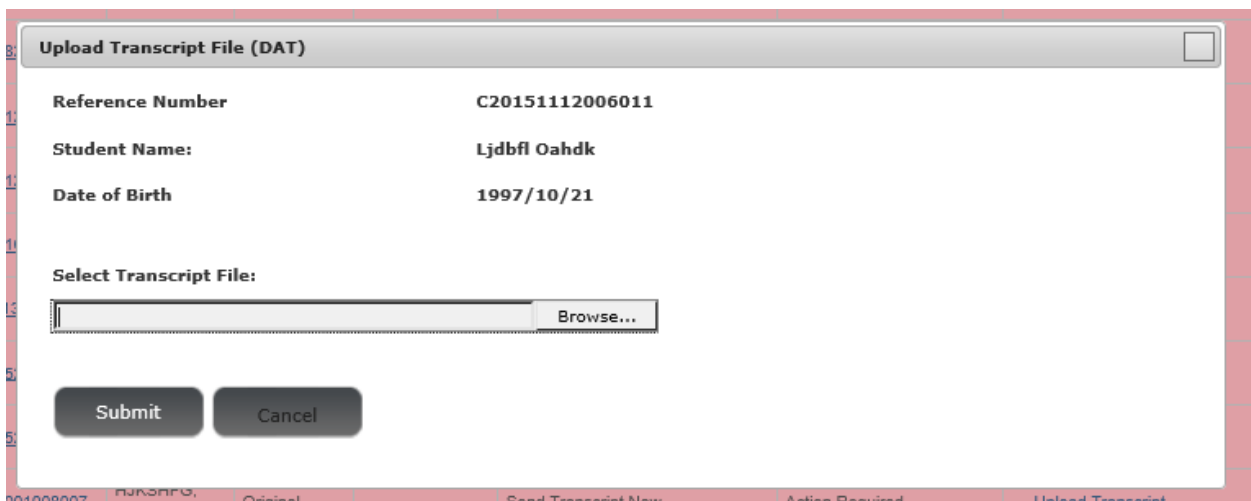
Action (No Upload) – Click this option and select the appropriate action when an electronic file (XML) cannot be uploaded

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

Upload Transcript
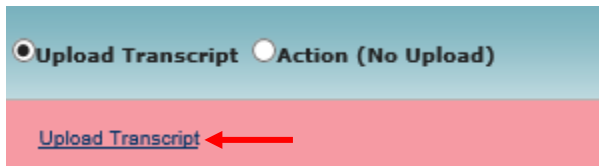
Select the Upload Transcript radio button and click the Upload Transcript link to open the Upload Transcript File window.
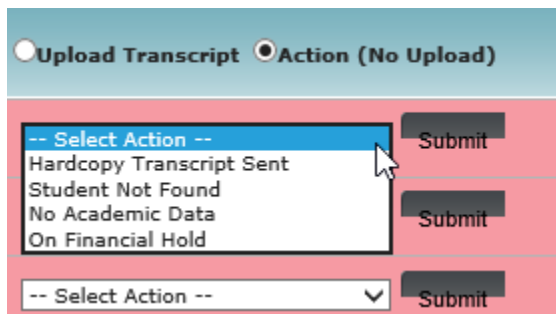
Browse – Click to select a DAT transcript file from your computer

Submit – Submit and upload the selected transcript file to the eTMS system

Cancel – Cancel uploading a transcript file and close the window

Action (No Upload)

Select the Action (No Upload) radio button and click the Select Action dropdown menu.

Hardcopy Transcript Sent – Transcript is only available in hardcopy format and is being sent to destination institutions. College user cannot locate an electronic transcript DAT in their Student Information System (SIS) to fulfill the transcript request and has the transcript in archive format only.

College user prints transcript and faxes or mails hardcopy transcript to destination institution(s) specified on transcript request details page.

Student Not Found – Student record could not be located in the college's SIS system.

Request status is updated in the online application portal to inform applicant their student record could not be located. An automated email is sent to applicant with instructions to contact the college with any questions.

Transcript request is moved to Incomplete tab.

No Academic Data – Used when the student is registered at a college and is found in the college's SIS system, but no academic data is available to send (i.e. student pre-registered only).

On Financial Hold – Used to hold transcript request due to outstanding fees owed to the college by the student / applicant.

Request status is updated in online application portal to inform the applicant that payment is outstanding and their transcript request will not be processed. An automated email is sent to the applicant with instructions to contact the college to settle the outstanding fees.

Transcript request is moved to Incomplete tab and can be further actioned at a later date.

Deferred – Available only if specified send date is other than Send Transcript Now. Request is placed on Deferred status and college user indicates date transcript will be available.

Transcript request is moved to the Deferred tab.

Acknowledge Cancellation – Available only for Cancellation Transcript Request Type; used to send acknowledge cancellation response.

Request status is updated in online application portal to inform the applicant their request was cancelled. Transcript request is moved to Completed tab.

Submit – 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

OEN – Search for transcript requests by OEN

Reference Number – Search for transcript requests by Reference Number

First Name – Search for transcript requests by First Name

Last Name – Search for transcript requests by Last Name

Search – Submit search using the entered criteria

Clear – 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

Deferred – Search the following:

☐ Winter – Search for requests with an End of Winter send date

☐ Fall – Search for requests with an End of Fall send date

☐ Spring / Summer – Search for requests with an End of Spring / Summer send date

☐ After Degree – Search for requests with an After Degree Conferred send date

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 colleges

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

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

Search – Submit search using the selected criteria

Clear – Clear all search fields

Transcripts

ontariocolleges.ca
APPLY TODAY. CHANGE TOMORROW.

Français

eTMS

| Transcript Requests | Transcripts | Reports | Notifications |

⊞ Search

To Be Processed   Completed

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Showing 50 Items per Page. Page 1 of 1, Items 1 - 4 of 4

Date Requested	Reference Number	Account Number	Name	Request Type	Request Status
2017/01/12	C20170112006989	210018163015	îhXfésaVgflosb'üB-VYîñvl, C	Original	Electronic Transcript Sent
2017/01/13	C20170113006990	210019002571	Lang, Stephenie	Original	Electronic Transcript Sent
2017/02/16	C20170216007098	210019165426	Key, Ignacia	Original	Electronic Transcript Sent
2017/05/03	C20170503007401	210019548862	Key, Ignacia	Original	Electronic Transcript Sent

Pages: |<First <Previous 1 Next> Last>|
Showing 50 Items per Page. Page 1 of 1, Items 1 - 4 of 4

To Be Processed – Display list of transcript requests to be processed

Completed – Display list of completed transcript requests

Date Requested – Date transcript request was paid

Reference Number – System-assigned number at the time the transcript request is initiated. Click the link to display the official transcript.

Account Number – Applicant's ontariocolleges.ca account number

Name – Applicant's first and last name, as provided on their ontariocolleges.ca application

Request Type – Type of request

Request Status – Status of request

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Transcript Search

Click the + icon beside Search to expand Basic Search functions. There are no advanced search functions.

Start Date & End Date – Search requests by creation date.

Application Number – Search requests by Application Number.

Account Number – Search requests by Account Number.

OEN – Search requests by OEN.

Reference Number – Search requests by Reference Number

First Name – Search requests by first name.

Last Name – Search requests by last name.

Clear – Clear all search criteria.

Search – Submit search using the criteria entered by user.

Reports

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eTMS

| Transcript Requests | Transcripts | **Reports** | Notifications |

Reports

Date Transcript Request Received

Start Date: [ ]   End Date: [ ]

(Dates refer to date transcript request paid by applicant)

Clear   **Run Report**

Start Date & End Date – Select request creation date criteria

Clear – Clear all report criteria

Run Report – Generate a report based on the specified criteria

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Reports – Summary & Detailed

Summary	Detailed

Download X CSV PDF

Date Range : 2018/01/01 to 2018/01/16

Total Transcript Requests	Original Transcript Requests	Re-Issue Transcript Requests
To Be Processed	4	0
Deferred	0	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	0	0
OCAS Auto eTMS Processed XML Electronic Transcripts Sent	0	0
OUAC Auto eTMS Processed XML Electronic Transcripts Sent	0	0
OCAS Manually uploaded XML Electronic Transcripts Sent	0	0
OUAC Manually uploaded XML Electronic Transcripts Sent	0	0
OCAS Hardcopy Transcripts Sent	0	0
OUAC Hardcopy Transcripts Sent	0	0
Requests Cancelled	0	0
Receipt Acknowledged	0	0
OCAS Unknown Source	0	0
OUAC Unknown Source	0	0
TOTAL TRANSCRIPT REQUESTS	4	0
AVERAGE TIME FOR FULFILLMENT - 0 BUSINESS DAYS		
% Of Transcript Requests processed by Auto eTMS	0%	

Summary – View the status of transcript requests by date range

Detailed – View transcript request details by applicant by date range

Download to CSV – The CSV report displays all transcript request details provided by each application. The Excel format file information can be filtered and sorted, if required.

Download to PDF – The PDF report displays all transcript request details provided by each applicant.

Notifications

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eTMS

| Transcript Requests | Transcripts | 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 – Enables the email notification to identify how many transcript requests were fulfilled

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.

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

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Transcript Request Details

Print

TRANSCRIPT REQUEST DETAILS

Action : ○ Provide Response

⦿ Upload Transcript [   ] Browse... Upload

Note that fields that have no values are hidden for your convenience.

TRANSCRIPT REQUEST INFORMATION

Date Received	2018/01/09
Reference Number	C20180109008439
Application Number	170382213
Account Number	210020378392
Request Type	ORIGINAL
Send Transcript	SEND TRANSCRIPT NOW
Send or Term Date	N
Current Status	Action Required
Last Updated By	System/Système

STUDENT INFORMATION

Surname	testadd
First Name	sam
Gender	Male
Date of Birth	1993/09/08
OEN	000000000
Student ID	1232121
College Name	Lambton
Date Last Attended	2013/05/01

CONTACT DETAILS

Phone Number	(111) 1111111
Email Address	samtestadd@mailinator.com

SEND TRANSCRIPTS TO

1. Algonquin

Close

Print – Prints the information displayed on-screen

Provide Response – Displays submit response function

Upload Transcript – Displays upload transcript function

Close – Closes the Transcript Request Details page and returns to eTMS

Note: Fields with no values are hidden for your convenience.

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