

Some eTranscript California colleges may find it necessary to process electronic transcripts in significantly different ways depending on the college from which the transcript is received. For example, a college may be able to process transcripts from a primary “feeder” college in EDI or XML format, but will need to receive transcripts from other colleges in PDF format to print and process as paper transcripts.

As an example, this appendix outlines a procedure for downloading transcripts from one college in EDI TS130 format, and downloading transcripts from all other colleges in PDF format. The procedure uses two slots, one for EDI downloads and one for PDF downloads. Custom filters (called ‘rules’) are applied to the two slots to determine the colleges whose transcripts will be downloaded in each slot (i.e., format).

Download Slot Allocation

You will need to have at least two slots allocated for this procedure. A “College Transcript TS130 project must be assigned to one slot, and a “College Transcript View: Full” (i.e., PDF) project must be assigned to another slot.

For this example, slot 25 is configured to download TS130 transcripts, and slot 26 is configured to download PDF transcripts, as shown in *Figure E-1*.

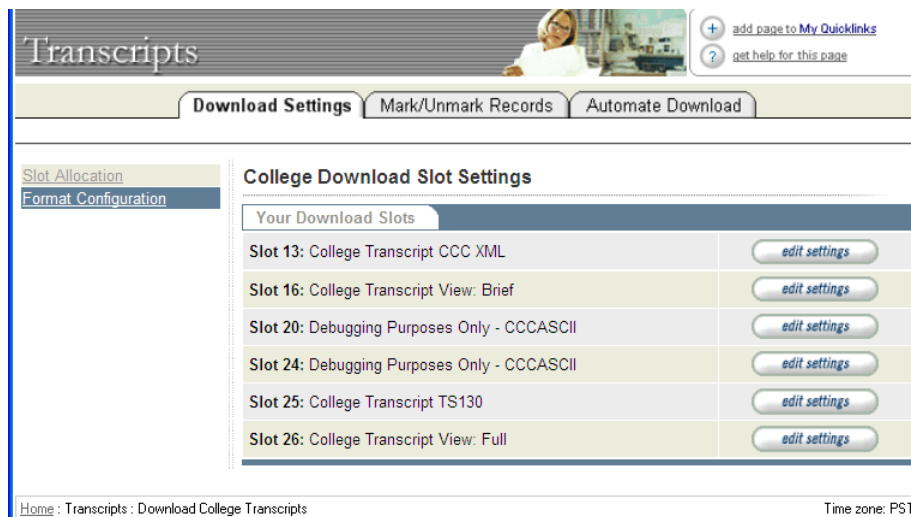


Figure E-1. College Download Slot Settings

Applying a Filtering Rule for the TS130 Slot

In this example, we want to create a rule that filters the transcripts downloaded in slot 25 so that only transcripts from Butte College are downloaded. The procedure for doing this is as follows:

1. Select “edit settings” for slot 25 on the College Download Slot Settings screen (*Figure E-1*). This will bring up the Edit College Download Slot Settings screen, as shown in *Figure E-2*.

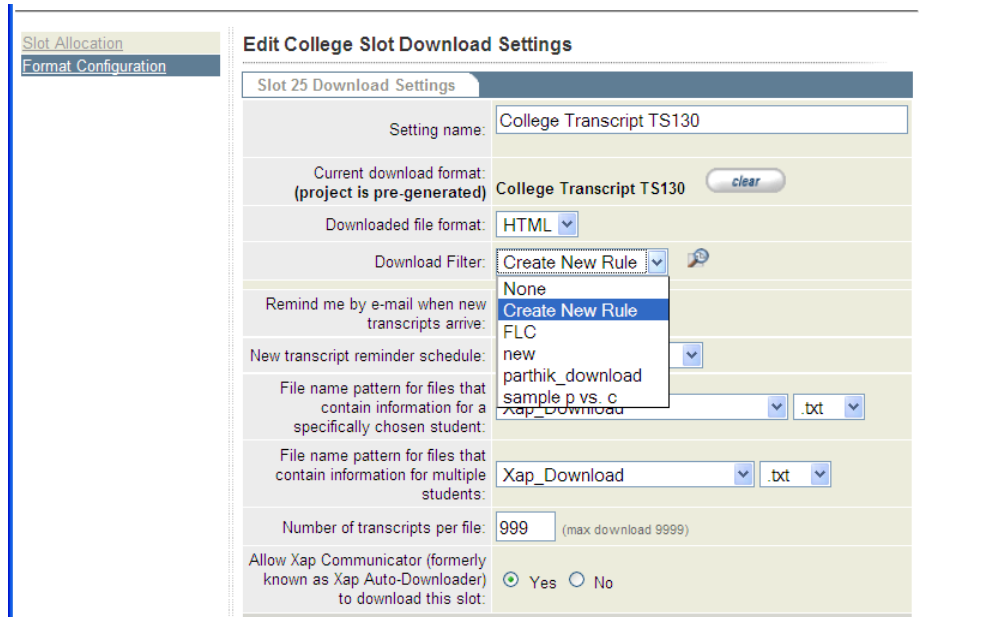


Figure E-2. Edit College Download Slot Settings Screen

- For “Download Filter”, select “Create New Rule” as shown in Figure E-2. Then click the magnifying glass icon at the right of “Create New Rule”. This will open the Rules Wizard as shown in Figure E-3.

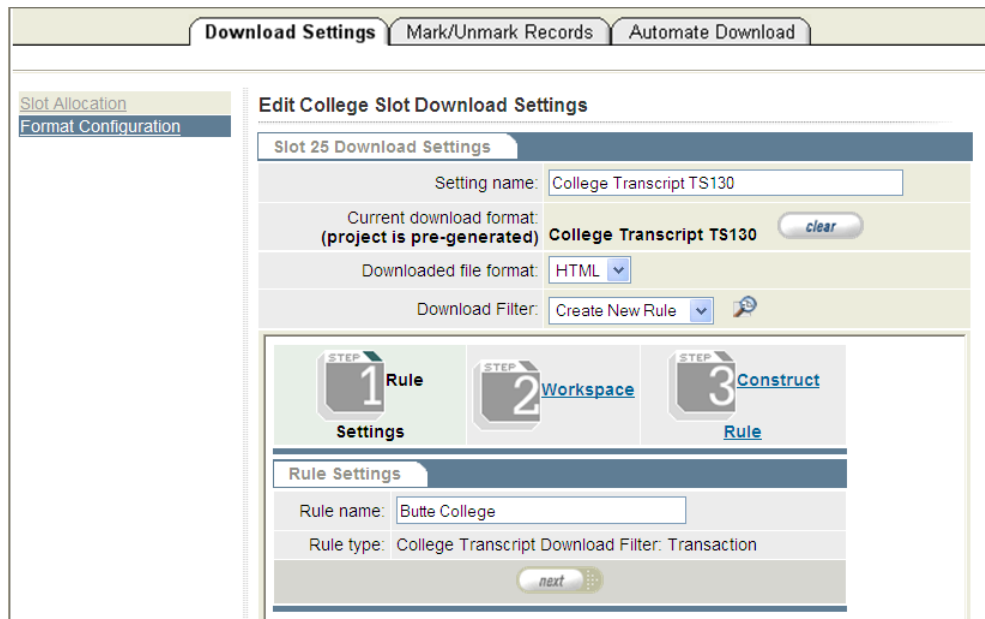


Figure E-3. Edit College Download Slot Settings Screen with Rules Wizard

3. Enter a name for the new filter/rule being created. Since in this case we will use the TS130 slot to download transcripts only from Butte College, we will name the rule "Butte College", as shown in *Figure E-3*. Then click "next". The Rules Wizard will advance to the Workspace segment as shown in *Figure E-4*.

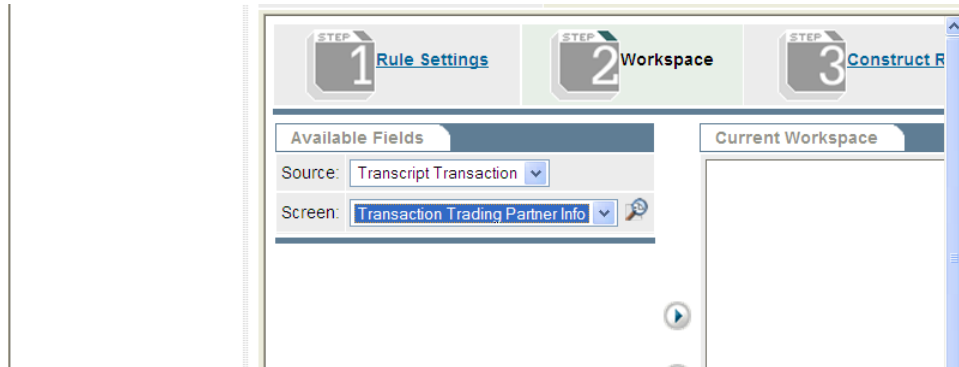


Figure E-4. Rules Wizard, Workspace Segment

4. For the "Source", select "Transcript Transaction". For the "Screen", select "Transaction Trading Partner Info". The list of Available Fields will populate as shown in *Figure E-5*.

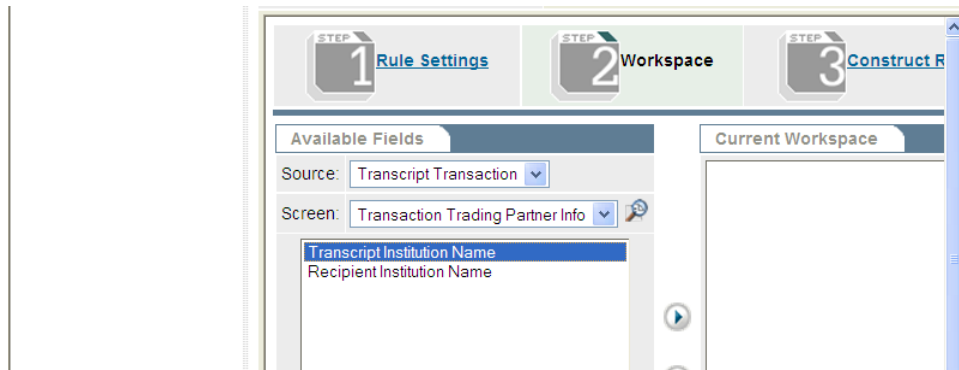


Figure E-5. Rules Wizard, Workspace Segment: Fields Listed

5. From the listed fields, select "Transcript Institution Name" as shown in *Figure E-5*. Click the right-pointing arrow to move that value into the "Current Workspace" column, as shown in *Figure E-6*.

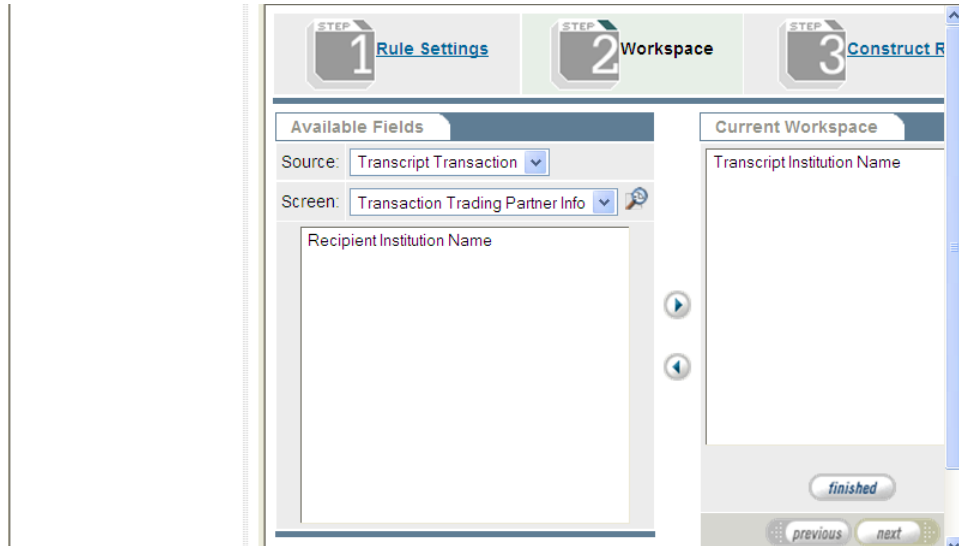


Figure E-6. Rules Wizard, Workspace Segment: Field Selected

6. Click the “finished” button directly below “Current Workspace”. The Rules Wizard will advance to the Construct Rule segment as shown in Figure E-7.

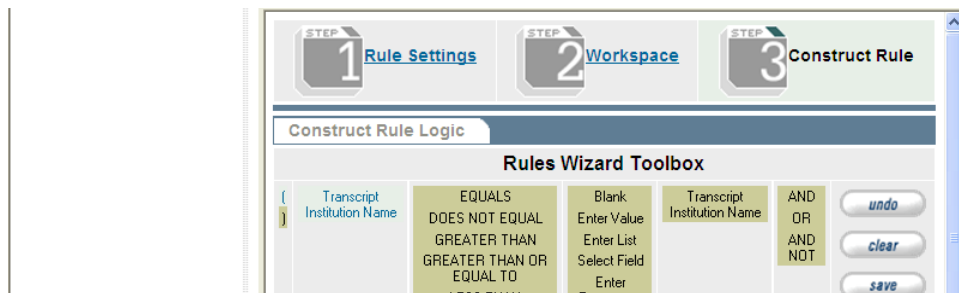


Figure E-7. Rules Wizard, Workspace Segment: Field Selected

7. At this point you’ll begin constructing the rule as a Boolean logical statement.
 - a. First click on “Transcript Institution Name” in the left column. That field will appear in the Rules Wizard Statement for Butte College as shown in Figure E-8.

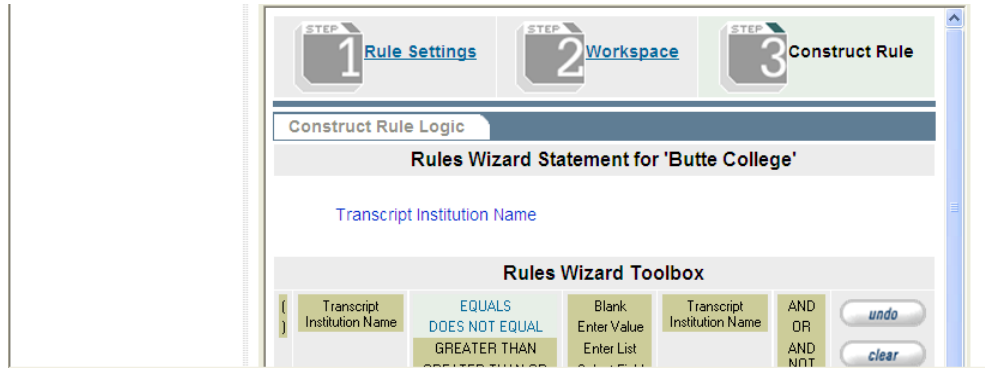


Figure E-8. Rules Wizard: Constructing the Rule

- b. Moving from left to right in the Rules Wizard Toolbox, click on “EQUALS”, which will then appear in the Rules Wizard Statement as shown in Figure E-9.

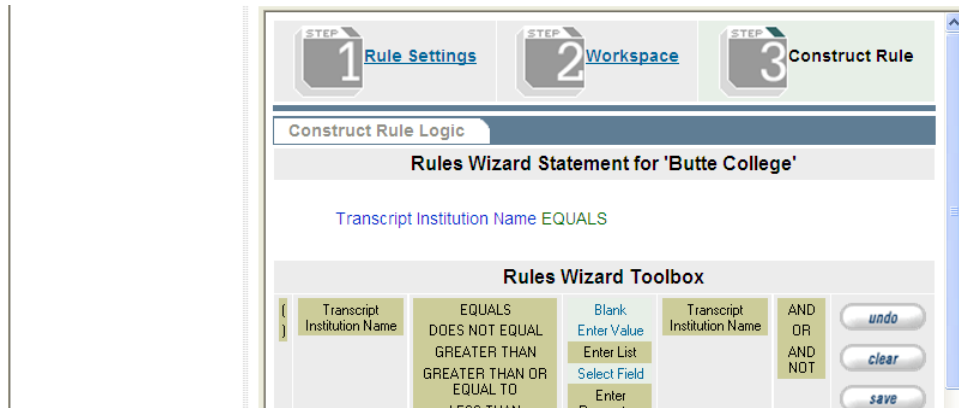


Figure E-9. Rules Wizard: Constructing the Rule

- c. Click on “Enter Value”. The Toolbox will then show the value-entry section shown in Figure E-10.

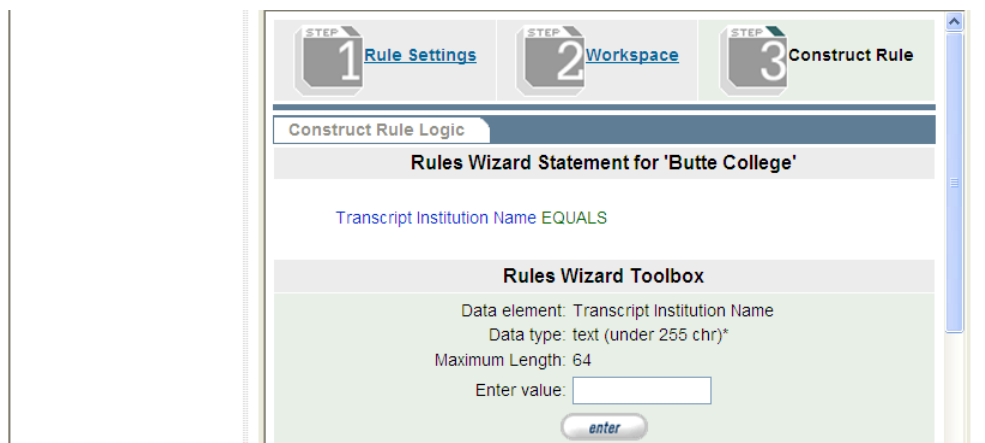


Figure E-10. Rules Wizard: Constructing the Rule

- d. Enter the college name EXACTLY as it appears in eTranscript California: in this case, “Butte College”. Then click “enter”. The Rules Wizard Statement will be completed as shown in Figure E-9.

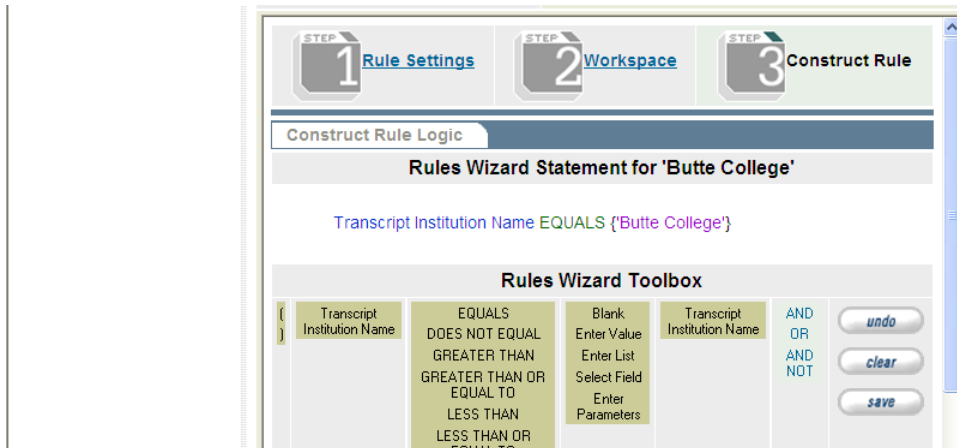


Figure E-11. Rules Wizard: Constructing the Rule

- e. Click the “save” button. This will create the new rule and close the Rules Wizard.

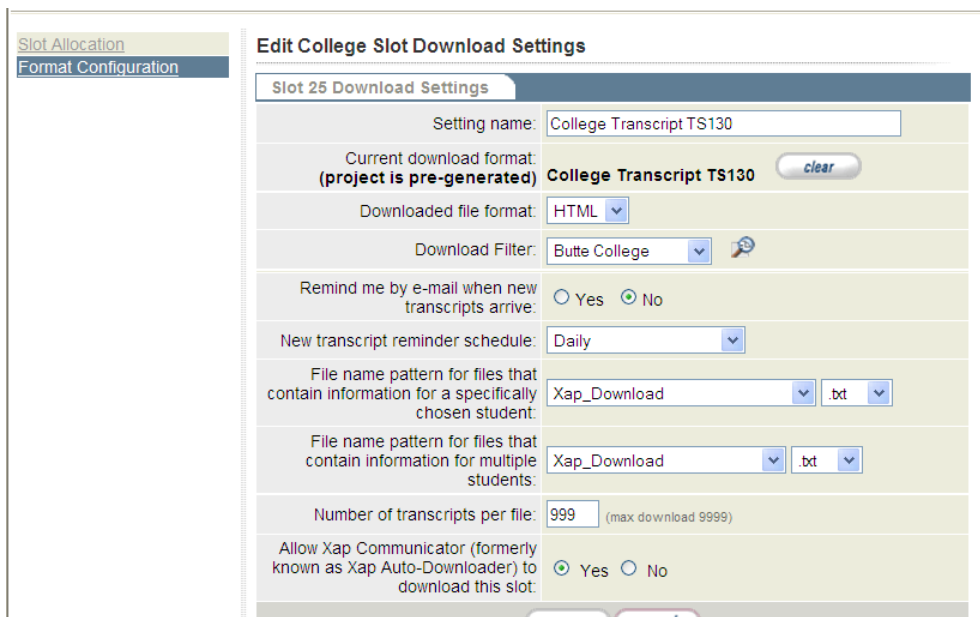


Figure E-12. Edit College Download Slot Settings Screen: Rule Applied

8. In the Edit College Download Slot Settings screen, complete any other configuration for the slot that you would like. Then click the “save” button at the bottom of the screen. This will save the new slot configuration, including the added Download Filter.

Applying a Filtering Rule for the PDF (Transcript View) Slot

In this example, we want to create a rule that filters the transcripts downloaded in slot 26 so that all transcripts are downloaded EXCEPT transcripts from Butte College. The procedure for doing this is exactly the same as given above for the TS130 slot, except:

- At step 3, name the rule “Not Butte College”.
- At step 7.b, select “DOES NOT EQUAL” (instead of “EQUALS”).