CCCApply and CCCTran 2008 Workshop

Advanced Training Guide

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1. Advanced Training – CCCApply

1.1 Term Rules

To Activate a Term Rule

1. Select Term Controls from the Application Controls menu.
2. Select the term to be edited and click 'edit'.
3. Select Application Status from the menu on the left.
4. Select a rule from the Available Rules area and click the 'add' button next to the desired rule. A pop-up box will appear.
5. Enter the date you wish to activate the rule. The date must be in the mm/dd/yyyy format. If you do not enter a date, the rule will remain active indefinitely.
4. Enter a message that will appear to the applicant/user if they attempt to submit an application that meets the rule specifications.
5. Click the 'Save' button.

To edit the rule settings for an active rule, click the 'edit' button next to the rule.

To deactivate the rule, click the 'remove' button next to the rule.

1.2 Major Management

To Add a Major

1. Highlight the major you would like to precede the new major.
2. Click the 'Add' button.
3. Enter the desired major name (limited to 64 characters per name) and major code (limited to 30 characters per code)
   Select an open/close status for this major.
4. Click the 'Add' button.

1.3   Variable Workspace Manager

To Create a Project

1. Select Variable Workspace Manager from the Application Controls menu and click create.
2. Enter a name and a description of that project and click 'Next'.
3.   Select the Data Source to be used. In most cases it will be the Application.
4. Select the screen which contains the data element or field you want to use.
5. Select from the lists of fields and click the right arrow button.

Add to an Application Follow up Task

1. Select the Application Confirmation E-mail you would like to update click 'edit'.
2. Select a project from the Variable Workspace menu and click the magnifying glass.
3. Click the text message box where you want the variable to appear.
4. Click the "+" next to the variable you want to use. It should appear in the desired space.
5. Click the 'Save' button.

1.4   Rules Wizard

Add to a Submitted Applicant Filter/Rule

1. Select Rules Wizard from the Application Controls dropdown menu.
2. Select Submitted Applicant Filters and click the 'create' button.
3. Assign it a unique name in the text field located in the Rule Setting area and click the 'next' button at the bottom of the screen to begin creating your filter/rule.
4. Select the Data Source to be used. In most cases it will be the Application.
5. Select the screen which contains the data element or field you want to use to create your filter/rule.
6. Select from the lists of fields and click the right arrow button.
7. Click the 'finished' button.
8. Use the Rules Wizard Toolbox to construct your filter/rule.
9. Click the 'save' button.

To Add a Application Term Open/Close Filter**/**Rule

1. Select Rules Wizard from the Application Controls dropdown menu.
2. Select an Application Term Open/Close Filter and click the 'create' button.
3. Assign it a unique name in the text field located in the Rule Setting area and click the 'next' button at the bottom of the screen to begin creating your filter/rule.
4. Select the Data Source to be used. In most cases it will be the Application.
5. Select the screen which contains the data element or field you want to use to create your filter/rule.
6. Select from the lists of fields and click the right arrow button.
7. Click the 'finished' button.
8. Use the Rules Wizard Toolbox to construct your filter/rule.
9. Click the 'save' button.

1.5   Supplemental Design Kit

1. Select Supplemental Design Kit from the Application Controls dropdown menu.
2. On the Project Selection screen, click the 'Create' button.
3. Enter a name for the supplemental project in the field provided. We recommend that you name it something that relates to your project or is easily identifiable.
4. Click the 'create' button. You will be taken to the Project Settings screen.
5. Click the 'add new group' button in the Project Questions area. The Edit Group Name popup window will appear.
6. Enter the Heading for the set of Project Questions you are going to create. You can use the dropdown list under 'Select a group name' or enter a name of your choice below 'Enter custom name'.
7. Click the 'save' button. The Group Name will appear under the Group Heading column in the Project Questions box.

To Create a Question Under Any Heading

1. Click on the corresponding 'add new question' button. You will be taken to the Question Wizard screen.
2. In the Question name box, type in a name that you wish to associate with the question.
3. In the box titled "Type of question" Use the dropdown list to select the question type:
Yes or No question
Dropdown list
Free form text box (up to 255 characters)
Essay box (over 255 characters)
Check box
4. Click the 'next' button.

If you select "Dropdown list" or "Free-form text box from the "Type of question" list, you will be taken to a screen that requires you to choose the type of data to be stored before being taken to the question prompt screen

If you selected any of the other options from the "Type of question" list, you will be taken directly to the question prompt screen.

5. In the row, named "Question prompt", enter the question you wish to ask. You are limited to 255 characters.

6. In the next row, indicate whether or not you wish to make this a required response by clicking Yes or No. Clicking Yes will prevent the applicant from submitting your application until the question is answered.

7. Click the 'next' button. Depending on the type of question you choose there may be further formatting options.

Activating a Project

To add a project to your **beta** application, select the button beside your project and click the 'activate beta' button.

To activate a project to the **live** application, select the button beside the project and click the 'activate live' button.

You can only activate one project (one Beta and one on Live) using the Supplemental Design Kit at any given time. However, you can create as many projects as you wish.

Deactivating a Project

To deactivate a project that is on the **beta** site, select the button beside the project that has the words [Active on Beta] and click the corresponding 'deactivate' button.

To deactivate a project that is **live**, select the button beside the project that says [Active on Live] and click the corresponding 'deactivate' button.

To edit or delete a project, select the button beside the project name and click the 'edit' or 'delete' button.

1.6   Creating a Custom Export Project (Export Wizard)

To create a custom export project:

1. Select and click "Export Wizard" from the Application Processing menu.
2. Click on the "create" button.
3. Select the student information system that your institution uses [Express Configuration (for users who wish to download application projects), SunGard Higher Education Banner Express, People Soft, TS189 Express, Datatel Express, and Custom Configuration (for expert users only)] and then click on "next".
4. SunGard Higher Education Banner, People Soft, TS189, and Datatel Express formats will automatically name your project, then generate and build it. You cannot modify any of these express formats except for the Datatel Express.
5. For the other export configurations, choose a name for your export project and enter it and then click "next."
6. Wait for a few seconds while the Control Center adds the appropriate export fields and then click "next."
7. If you selected the Express Configuration, you will be at the Project Fields screen.
8. If you selected Custom Configuration, the export wizard will take you into the Project Setting for your Export project. Choose your setting and then it will take you to the Project Fields screen.
9. Select the Data Source to be used. In most cases it will be the Application.
10. Select the screen which contains the data element or field you want to use.
11. Use the left arrow key to remove data elements/fields that you do not want to use.
12. Use the right arrow key to add data elements/fields that you want to use.
13. You can also click the "Insert String" button in order to insert special characters (transaction codes, field delimiters, tabs, line breaks) into your export output.
14. You can also edit a field in your current export by selecting it and then clicking on edit.
15. Once you hit edit you can change the field question; you can change the data conversion/format; you can change the start position; you can change the maximum/fixed length; and you can choose whether or not you want to concatenate fields.
16. In Project Fields you can also change the order of your selected fields. Highlight the field you want to move and then click either the up or down arrow key. Each click will move the field one space. To move a field more than one space, enter the number of spaces you would like to move the field in the box next to the up/down arrow keys and then click either the up or down arrow.
17. In the Global Settings tab you can customize the delimiter formats, footers, and headers. (A delimiter is a character that identifies the beginning or the end of a string of characters. A delimiter serves as a signal to the computer that it has reached the end of the data for that field and that the following data is for the subsequent field.)
18. The Documentation tab is next. This tab is a data dictionary for each of your export projects. It will show you information such as: the date an export project was created, last modified, and last generated, how you how many fields your project has, the length of each field, and the format of each field.
19. To implement your field configurations, click the "Generate Project" tab.
20. You will see your project summary: project name, date created, last updated by, etc.
21. Click "generate" when you are ready to begin using the project.

22. Once the project is finished building, you can download test records by clicking the "download" button.
23. Select the date range that you want to access applications from, click the view you want to use, and then click "update".
24. Check the box by the applicant's last name and click the "download selected" button.
25. You can click the "cancel" button at anytime if you wish to stop the system from retrieving the records.
26. After your file has generated, right click on the hypertext and save the flat file to your hard drive or network for importing into your institution's student information system.

1.7   Creating a custom Print Project (Print Wizard)

The print wizard is an automated tool that enables you to create simple and compact PDF reports of submitted applications. Each time you use the Print Wizard to configure a new file format, you create a print project. Each print project you create is available to every campus representative from your institution that has privileges to the Print Wizard tool.

1. Go to Application Processing and click on "Print Wizard."
2. Click on the "create" button at the bottom of the screen.
3. Choose the print configuration that you want to use and click "next." Express configuration places all fields contained in your XAP online application into your print project. The custom configuration allows you to build the Print output as you wish.
4. Name you print project and click "next."
5. Wait as the system adds the print fields.
6. Click "next" after the system is finished adding print fields.
7. Select the "Global Settings" tab.
8. You will see 4 sections (project options, table style, title style, logo style) on the left side of your screen.
9. "Project Options" contains options to add, change, or delete application-specific information. After you make any changes click "save."
10. "Table Style" contains options for general formatting preferences: cell padding, cell spacing, alignment, border thickness, etc. After you make any changes click "save."
11. "Title Style" contains options that allow you to format the application header and footer. After you make any changes click "save."
12. "Logo Style" contains options to control the alignment and border thickness of the school logo. After you make any changes click "save."
13. Next select the "Manage Sections" tab.
14. On the left side of the screen click you will see "Rearrange Sections", "Rearrange Questions", and "Section Settings."

15. In "Rearrange Sections" you can delete sections by highlighting the section you want to delete and then clicking on the "delete" button.

16. If you want to add a page break, line break, or line separator highlight the section you would like it to appear after, select the separator you want to use and then click the "add" button.

17. If you want to move a section, highlight the section, in the box type in the # of spaces you want to move the section and then click on either the up or down arrow button.

18. Click on "Rearrange Questions" if you want to rearrange or move questions from one section to another.

19. In the "Move Questions from:" group, select the section from which you wish to move a question from.

20. In the "Move Questions to:" group, select the section from which you want to move the question to.

21. Select "Section Settings" if you wish to modify a particular section in your print project.

22. Select the section you want to modify and click the "go" button.

23. You will now be able to change the header, the footer, and the number of columns.

24. Make the desired changes and then click "save."

25. Now select the "Project Fields" tab.

26. On this screen you will see 2 boxes. The "Available Data" box on the left side will display all fields available from the application that is not already in your Print Output. To view the available fields, you must first select the Data Source.

27. Now you select the appropriate screen in order to view the corresponding data fields. (The drop down menu lists all of the screens available in your application.)

28. The dropdown menu found in the "Current Section Questions" area contains all of the sections, line separators, and page and line breaks that will be displayed on the print output.

29. To select a section choose the section of interest from the drop down menu and click on that section.

30. You will see a list of fields contained in the section you choose. You will also see new options that are specific to the option you choose.

31. To add duplicate fields from your application, turn on the "Display repeats" option. Fields that have been in the Print Project at least once will be displayed. Fields that have been used in the Print Project at least once will be marked with an asterisk. There is no limit how many times a field can be used.

32. To add a field to your print output, highlight the desired field from the Available Data list on the left and click on the right arrow button.

33. To insert a new field in a specific location, highlight the field that is just above the area you want your new field to be placed. Then click the right arrow button. Your new field will be moved to the location you requested. If no field in the print output is highlighted, the new item will be placed at the bottom of the list.

34. To remove a field, simply highlight the desired field from the "Current Section Questions" area and click the left arrow button.

35. To move fields up or down the list, highlight the field and click the up or down button. Each click of the up or down button will move the field one space. If you want to move the field more

than one space at a time, enter in the small box the number of spaces you want to move the field and then click on either the up or down button.

36. To edit a specific field question's format, highlight that field in the "Current Section Questions" area and then click on format edit.
37. Now you can edit the field question, data conversion/format, start position, maximum/fixed length, and choose whether or not to concatenate the field.
38. To edit the style of a field, highlight the field listed under "Current Section Questions" and then click on the style edit button.
39. Now you can change the field question and answer's alignment, font size, font color, etc.
40. Click preview to see how your print output currently looks (before you generate it).
41. Click on the "Documentation" tab.
42. This tab is a data dictionary for print projects you create. Here you can see when a project was created; when it was last updated; if it has any delimiters; how many fields are in the print project; etc.
43. Click on the "Generate Project" tab.
44. You will see a project summary (Project name, Used By, date last generated, etc.).
45. Click on the "generate" button to generate the print project.
46. The system will add the print fields.
47. Select the view you want to use and enter the date range you want to use and then click on "update".
48. Check the box next to the applications you want to download, and then click on the "download selected" button.
49. You will see two hypertext links. Click on the 1st one to view the file. Right-click on the end link and select "Save Target As" to download the file.

1.8 Assigning Projects to the Download Manager (Download Manager)

The Download Manager is designed to control an institution's Export Wizard, Print Wizard, and mapping projects. Its primary purpose is to associate and track various combinations of download projects and users. It does this so that multiple departments can have individual access to a variety of record formats whose downloads are tracked independently of each other. The first step to configure your download manager is to assign download slots.

1. Go to Application Processing and click on Download Manager.
2. Click on "Slot Allocation" on the left side of the screen.
3. There are 30 slots to choose from – one person to one slot, although more one individual can have more than one slot.
4. Each of the 30 slots has a drop down menu. Select the slot you want to use and select your name from the drop down list.

5. Slot #1 is the primary download slot. The date and time at which downloading from Slot 1 occurs is the "Download Date" in the list files, transcript managers, and other user records.

After you allocate your slots by clicking on 'Slot Allocation', you need to assign an Export Project, Print Project, or pregenerated project to your slot(s). This will allow you to access these projects every time you log on to the Control Center and go to the 'Download/Print Applications' section.

6. Click "Format Configuration" to edit your download slots. A screen will appear that lists your slot settings. If you have more than one slot, each slot number will be listed. (The 1st time you access this screen, your slot will be labeled "Project Not Assigned".
7. To assign your project, click "edit settings" next to the slot which you want to assign a project.
8. Select the format you wish to use (Pre-generated, Application, File Attachment). You cannot edit pre-generated formats. Because they were pre-generated by Xap.
9. If applicable enter a term filter. (will not download these terms)
10. If applicable enter a download filter. This allows you to create specific rules that can filter out certain applications. (for example if you only wanted to download applications from transfer students)
11. Select "yes" or "no" if you want to be reminded by e-mail when new applications arrive.
12. Select how often you want to be reminded when new applications arrive.
13. To modify the file name patterns for a specifically chosen student or for files that contain information for multiple students, select from the formats available on the drop down menus.
14. Enter the number of applications that you want per file (maximum is 9999).
15. Select "yes" or "no" if you want the Xap Communicator to automatically download this slot. (You have the ability within the Download Settings to set up each slot to either download the files manually or use the Xap Communicator. If you select 'Yes', the slot will be read and downloaded via the Xap Communicator. If you select 'No', you can only download the files by going into the Control Center and doing so manually.)
16. Next select if you want to wait until the Letter of Recommendation (LOR) is received before downloading the application.
17. Once all of your settings have been selected, click the "save" button.

1.8.1   Assigning a project to the default viewer (Download Manager)

The Default Viewer allows you to view a student application in a Particular Print Wizard format.

1. Click on "default viewer" on the Download Settings Menu.
2. If there is already a current download format listed and you want to switch to another download format, click the "clear" button.
3. Select which Print Wizard project you would like to view the applicant files in.

1.8.2 Marking/Unmarking records (Download Manager)

The Download Reminder Settings is designed to allow you to manage the status of your marked and unmarked records. The slot status information is created individually by slot and project, so they are useful in tracking which applications have been downloaded and which have not. When a project is initially assigned to a slot, all submissions are marked as Not Downloaded. Therefore, if you intend to download only new records submitted from that point on, you first need to mark all of the old records as Downloaded. Conversely, if a correction to a download project is made mid-stream, it may be useful to mark them as not downloaded and mark them again.

1. Go the Application Processing and select "Download Manager".
2. Click on the "Mark/Unmark Records" tab.
3. Enter a date range and time (time is optional) for the records you want to mark as either downloaded or not downloaded.
4. (The system reads 1 day as standard 24 hour time intervals. Thus, days begin at 12:00 AM and end at 11:59 PM; unless you enter in a specific time, all applications submitted between these hours will be marked for that day.)
5. Click "mark not downloaded" or click "mark downloaded".
6. You can also mark applications using their confirmation numbers instead of using date ranges.
7. Enter one confirmation number per line for each application you want to mark.
8. Then click on "mark not downloaded" or "mark downloaded".

1.9   Reports

1.9.1   Creating custom online reports (Application Submission Reports)

1.   Go to Reports and select "Application Submission Reports."
2. Click on the "View List" tab.
3. Go to the "View using" dropdown menu and select the view you want to use.
4. If you want to create a new view, click on the "create" button.
5. Name the view you are creating and click "create."
6. You are now in the Customized View Workspace. You now need to select the fields you would like to use to create the view.
7. The fields that will be displayed are found in the table on the right side of the screen.
8. The fields available to be included in your view are in the table on the left side of the screen.
9. If you select "Application" from the dropdown menu next to "Data Source" allows for the selection of various data fields from your mentor application.
10. To locate a specific data field, select the name of the screen for which it resides on your application. Once you select the name of the screen, all applicable fields will be displayed in the data table found beneath the screen fields.
11. To generate the view, click the "finished" button found at the bottom of the screen.
12. To add/delete field(s) highlight the desired field(s) from the table in which the field(s) currently reside. Click the arrow button found in the center of the screen to either insert or delete the highlighted fields to the alternative location.
13. You may edit the style of a specific data field by highlighting that field in the Current Section box and clicking on the 'edit' button found towards the bottom of the screen. This will open a popup window. Make the appropriate changes and click 'save'. When you are finished making changes or if you choose not to make any changes, click 'cancel'.
14. To move fields up and down the list, highlight the field and use the up arrow button or down arrow button, located to the right of the Selected Fields box. Each click will move the highlighted field up or down by one space. Hold down the Ctrl button (Command for Macintosh users) to select multiple fields at once.
15. Once you have created your view, you must enter the date range (from and to dates) for the applications that you wish to retrieve.
16. You can select (or create) a rule if you wish to filter out certain types of applications from your application submission report.
17. Click "update" and you will see an "Application Submission List" which lists the applicants' names, social security numbers, confirmation numbers, date submitted, date downloaded, and slots downloaded.
18. You have the option of clicking on the "Open in Excel" hypertext, which will generate the report in an excel spreadsheet.
19. You can click on the printer icon to print an application.
20. You can click on the "View Profile" icon and you will get detailed information regarding the applicant. From this screen you can even send the applicant an email or add a note.
21. By clicking on the gray envelop icon, you can also send an email to the applicant.
22. Click on the "Tally" tab.

23. Input the date range to you want information regarding.
24. Enter (or create) a rule if you want to filter out (exclude) certain applications from the results.
25. Click the "run" button.
26. You will see a tally (broken down by term and month) of how many applications were submitted during the time frame in question.

1.9.2   Creating a custom online statistical report (Application Stats Report)

The Application Report Wizard module allows you to generate customized real-time reports based on submitted application data. The reports created can filter data based on date of submission as well as any custom rule that you have created for downloading applicants. Statistical Reports are for generating aggregate information on your data. For example, they can provide a breakdown of how many people are from each zip code or high school. They do not provide lists of individuals.

1. From the Reports menu, choose the Application Report Wizard option. Click on the Report Editor tab, and click the "create" button.
2. Type a name for the report in the Report Title text box, and click the save button.
3. Select a data source from the Available Fields box. Choose Application if you want to create the report based on data from your application. If you are looking for special fields like application start date, submitted term, or payment type, select the Special Values item from the list of screen names.
4. Use the arrow buttons to add data fields to the Selected Fields box. You can select the fields from one or more data source. After you add the fields, click the "finished" button. The report name will be added to the "Report Viewer".
5. To view the report, click the "Report Viewer" tab, select a report, and click the "view" button.
6. To specify a timeframe for the report, enter the dates in the "From" and "To" fields.
7. If applicable, select a Rule to filter or limit the results.
8. Click the "run" button to generate the report.

2.   Advanced Training – CCCTran

2.1   Preferences

To access the CCCTran Preferences:

1. Select Preferences from the Transcript Menu.
2. Select from the list of Transcript Options.

Transcript Options	
Transcript Receipt	Configure various methods for receiving transcript and request data.
Transcript Expiration	Control the process of when transcript records will expire in CCCTran.
Transcript Request Setup	Enables a transcript institution to determine the student information that it requires from a requestor for single or batch requests for transcripts.
Fees Policy	Set the individual rates for the various types of transcript requests.
Fee Waiver Rules	Allows an institution to waive its fees for single, bulk and batch requests.
Fulfillment Workflow	Enables an institution to manage CCCTran's default workflow steps for transcript fulfillment.
Request Acceptance Rules	Enables an institution to identify the colleges and third-party institutions that it will not accept requests from and identify the colleges that will be allowed to submit bulk list requests.
Miscellaneous Institution Information	Additional institution information.

2.1.1   Transcript and Request Receipt Options

The Transcript and Request Options establish the preferred method for delivery of transcript data. The default delivery method for receipt of transcript data is via the Control Center through the and/or the Transcript Download Manager. To use this method, an administrative user must configure a download slot with a project format and other settings; after which, transcript requests and transcripts may be downloaded as a part of CCCTran operations. Click each applicable link.

2.1.2 To configure the Transcript Request Download Manager

1. Select Preferences from the Transcript Menu.
2. Select "Transcript Request Download Manager" from the list of Transcript Options.
3. Select "Slot Allocation" from the menu on the left.
4. Select an "open slot" and click the down arrow for the slot. A drop-down list will display with the names of people for your institution that have access to the download functions for transcripts.
5. Select your name from the list. Click the "Save" button.
6. Select "Edit Settings".
7. Select "Pre-generated" from the available formats.
8. Choose "Transcript Request CCC ASCII" or "Transcript Request CCC XML".
9. Make changes to the download settings, if necessary.
10. Click the "Save" button.

2.1.3 To configure the Transcript Download Manager

1. Select Preferences from the Transcript Menu.
2. Select "Transcript Request Download Manager" from the list of Transcript Options.
3. Select "Slot Allocation" from the menu on the left.

4. Select an "open slot" and click the down arrow for the slot. A drop-down list will display with the names of people for your institution that have access to the download functions for transcripts.
5. Select your name from the list. Click the "Save" button.
6. Click the "edit settings" button for the slot you want to configure, or click the "Format Configuration" link.
7. Choose one of the "Pre-generated" project formats:

       College Transcript CCC XML
       College Transcript TS130
       College Transcript View: Brief
       College Transcript View: Full
       College Transcript View: Gen Ed
       Debugging Purposes Only – CCCASCII

8. Make changes to the download settings, if necessary.
9. Click the "Save" button.

2.1.4 Transcript Expiration Policy

The Transcript Expiration Policy controls the process for when transcript records will expire in CCCTran. When a transcript is expired, it can no longer be viewed or download in CCCTran. The expiration policy for the transcript institution affects the transcript up to the time the transcript is delivered; the expiration policy for the recipient institution applies after the transcript is accessed (i.e., viewed or downloaded). An expiration policy can be set for both "sent" and "received" transcripts.

Received Transcripts
The expiration policy for Transcripts Received controls when to expire the transcript records received from other institutions. Select one option only.

- Expire after issuance
- Expire after view/download
- Expire immediately following delivery
- Do not expire. This option will retain the received transcripts on CCCTran for future access.

Sent Transcripts
The expiration policy for Transcripts Sent controls when to expire the transcript records sent to other institutions. The user may select one option. Select one option only.

- Expire after issuance
- Do not expire. This option will retain the sent transcripts on CCCTran for future access.

2.1.5 Transcript Request Setup

The Request Setup preference enables the transcript institution to determine the student information it requires from a requestor for single or batch requests for transcripts.

Create Required Fields Group

1. From the list of Preferences , click the "Request Setup" link.
2. Click the "add" button.
3. Select the required fields from the ID Fields Requested list, and click the upper arrow to add fields to the Required Fields Group list.
4. Click the "update" button to store a fields group.

If more than one group is created, the requestor will be presented with all groups and allowed to choose.

Edit/Delete Required Fields Group

1. From the Edit Transcript Requests list, select a group to edit or delete.
2. Click the "edit" button to add or remove fields for a particular group.
3. Click the "update" button.

To remove a group, select the fields group and click the "delete" button.

2.1.6 Fees Policy

The Fees Policy preference sets the rates for the various types of transcript requests. The options are:

- Flat rate per transcript: The rate charged for a single transcript. The applicable rate is included in the electronic confirmation for requestors and in the e-mail sent to students after a request is submitted.
- Flat rate per request (multiple destinations): The rate charged per transcript request when multiple institutions are involved.
- Flat rate for unlimited requests: The rate that will be charged by the institution for unlimited requests.

- Flat rate for fixed number of transcripts: The rate that will be charged for a fixed number of transcripts, and the cost for each additional transcript.
- No fee: This option enables a transcript institution to withhold charging any fees for transcript requests.
- Custom fee statement: This option allows the transcript institution to indicate a special fee amount and statement.

2.1.7   Fee Waiver Rules

The Fee Waiver preference allows an institution to waive its fees for single, bulk and batch requests, or for all requests for one or more partner schools. Authorized users can manage a list of selected schools for their own institution. The options are:

- Waive only bulk list and batch request
- Waive only individual requests
- Waive all requests

To add a school, select the name from the Available Schools list and click the upper arrow. The name will be added to the Selected Schools list. To remove a school from the Selected Schools list, select the name and click the bottom arrow.

2.1.8   Fulfillment Workflow

The Fulfillment Workflow preferences contain the settings to manage e-mail notifications that may be sent at the completion of each fulfillment workflow step, and manage the Approve Transcript Request workflow step as an automatic process. Authorized users can create e-mail notifications for automatic delivery to students and the involved institutions, and enable or disable the option for CCCTran to automatically approve transcript requests.

1. From Preferences , select the "Fulfillment Workflow" link to access the editing options for the fulfillment workflow steps.
2. Automatic Approval for Transcript Requests: Clear the checkmark if you want to disable the automatic approval process for transcript requests. Otherwise, you must approve transcript requests manually in the Transcript Fulfillment Manager by means of the "approve requests" command.
3. Select a fulfillment workflow step from the list, and click the "edit" button.

2.1.9 Workflow Edit: E-Mail Notification Tasks

The E-Mail Task screen displays the various e-mail notifications that can be delivered as part of the fulfillment process. CCCTran automatically sends the notification when the step is successfully processed.

- The **Current Tasks** area displays the selected e-mail notifications for the workflow step, the task's active status and/or Rule filter, and other information.
- The **Add New Task** area shows the available e-mail notifications, and descriptions, that can be selected for the workflow step. A notification task can be added multiple times with delivery to different people.

  - Student Confirmation E-Mail –This notification will be delivered to the e-mail address provided for the student during the transcript request process. The default text can be modified accordingly, and you can append the notification with a customized message during the request process.
  - Transcript Institution Notification E-Mail –This e-mail notification will be sent to the primary contact at the transcript institution of the requestor. The user must configure the Task settings.
  - Requesting Institution Notification E-Mail –This e-mail notification will be sent to the primary contact at the requesting institution. You must configure the Task settings and e-mail text.
  - Recipient Notification E-Mail –This e-mail notification will be sent to the recipient if the recipient's e-mail address is included in the transcript request file. Otherwise, the notification will be sent to the primary contact's e-mail address. You must configure the Task settings and e-mail text.
  - Customer Notification E-Mail –This e-mail notification can be sent to other individuals who are involved with the request. You must configure the Task settings and e-mail text.

2.1.10 Task Settings

Select a task from the "Add New Task" column and click the "add" button to access the Task Settings screen.
The Task settings allow you to manage the status, behavior, and message for the e-mail notice.

- The "Active" option instructs CCCTran to automatically send the e-mail at the completion of the workflow step.
- The "Inactive" option disables CCCTran from sending the e-mail at the completion of the workflow step.

- The "Move on to next task" option instructs CCCTran to execute the next e-mail task, if it is active. Do not change the "Move on to next task" default setting. If you have a subsequent e-mail notification that you do not want delivered, change that e-mail task setting to "Inactive."
- "Do not execute any more tasks." Do not select this option.
- Create or select an existing Rule as a filter for who will receive e-mail notification based on selected criterion.
- Use the Variable Workspace to build a project of the data elements maintained in the Transcript Transaction or to create a list of variables to personalize your e-mail message. When you create the body text for the e-mail message, you can insert variables as placeholders for the actual data elements. Example: "Hello [student first name] [student last name], this notice is to inform you that..." When the message is generated, the variable is replaced with the actual data. Example: "Hello April Sanders, this notice is to inform you that..."etc.
- Input the "From" information for the "Name, E-Mail Address, and Subject" fields. Note: the Student E-Mail Notification will be delivered to the e-mail address that is submitted with the transcript request.
- Type the text of the letter in the Text Message box. If you are familiar with HTML, you can perform additional edits by selecting the View Source checkbox. You can design the e-mail message with specific fonts and other styles by selecting the applicable command button from the design toolbox. Click the save button to store the message.

2.1.11 Request Acceptance Rules

The Request Acceptance Rule enables an institution to identify the colleges and third-party institutions that it will not accept requests from and identify the colleges that will be allowed to submit bulk list requests.

- *Automatically Reject Requests (institutions).* This option identifies the institutions whose transcript requests will be rejected automatically. When the particular institution selects your institution to submit a bulk list request, the message "You are currently unable to submit requests to that school" will display.
- *Automatically Reject Requests (third party).* This option lets you automatically reject third-party transcript requests from the National Student Clearinghouse or from Credentials, Inc. Select the check box for one or both institutions. CCCTran automatically issues a rejection message to the third-party service . Leave the box unchecked to accept transcript requests from these services.
- *Accept Bulk List Requests.* This option identifies the institutions whose bulk list requests will automatically be accepted when submitted through the Transcript Request Wizard interactive process.

To add a school, select the name from the Available Schools list and click the upper arrow. The name will be added to the Selected Schools list. To remove a school from the Selected Schools list, select the name and click the bottom arrow.

2.1.12 Miscellaneous Institution Information

The Miscellaneous Institution Information preference has additional options for processing transcript requests. From the Preferences menu, choose the "Misc. Institution Info" link.

- You can identify the turnaround time required to process the transcript requests. This information will display when a requestor selects the "transcript institution link" for your school from the Transcript Activity page. Select the number of days and choose "business" or "calendar" from the applicable drop-down menus.
- You also can manage the allowed terms for which students may submit transcript requests. Complete the Term Name and Term Code fields, and then click the "add" button to include the term in the Active Terms box.
- Click the "update" button to save the preference settings.

2.1.13 Account Manager

The Account Manager component for CCCTran has the settings to create accounts for users, and to assign access to CCCTran based on a user's job responsibilities. The authorized user's account must have access rights for "Create/Edit Accounts" in the Account Manager in order to manage users' accounts.

2.1.13.1 Create User Account

1. From the Transcripts menu, select "Account Manager ." Click the "create account" button on the User Accounts table.
2. Type in the user's e-mail address, and click "next" to access the Create Account screen,
   Note: If the user has an active Control Center account, the Local Administrator will only be able to assign access rights to CCCTran functions but will not be able to assign an expiration time frame for the password.
3. On the Create Account screen, enter the user's profile information. The "Username," "Password," "First name," and "Last name" fields all must be completed with the required information in order to create an account. All other information is optional.
4. If the account belongs to the designated primary contact for transcripts, select the check box "Set as Primary Contact for this institution." Only one primary contact account is allowed, per institution for CCCTran. The primary contact's information will display when a requestor clicks the link for the particular institution from either the electronic confirmation or the transcript activity page.
5. To set an automatic logout when the account is idle, click the down arrow for "Enforce automatic idle account logout" and set a timeframe.

6. The user's CCCTran username and password also can be used to logon to the Xap Communicator. If the account will have access rights to the Communicator, set the selection for "Password expires after" to the highest setting (999 days). An expired password must be updated before logon access to CCCTran or the Xap Communicator can be restored.

2.1.13.2   Edit an Account

The authorized user can modify an account's information and access levels or delete accounts from the system. From the Transcripts menu, select "Account Manager ."

2.1.13.3   How to Modify an Account

Select the user's name from User Accounts list and click the "edit account" button. After you modify the settings, click the "update" button to permanently save the changes.

3.   The Xap Communicator (Automate Download)

The Xap Communicator is a Windows 2000/XP program that allows you to securely download newly submitted applications and transcripts automatically. It has built-in scheduling and can be configured to run as a Windows service or as a stand-alone application. The Xap Communicator is also equipped with the ability to launch programs or transfer files to a designated FTP server for post-processing.

3.1   Downloading the Communicator

1. Go to Application Processing and select "Download Manager."
2. Select the Automate Download tab.
3. Respond to the Install Shield Wizard prompts to download & install the Xap Communicator.
4. After the Xap Communicator has been downloaded and installed, open it from the folder to which you downloaded it.
5. Install the Xap Communicator to your desktop or run on a network system.
6. You must have administrator privileges to install the Communicator as a "services."
7. If you are not logged on with Administrator privileges during installation, you will only be able to operate the Communicator as an "application."

3.2   Launching the Communicator

1. The "Getting Started" dialog box will appear the 1st time Xap Communicator is launched.
2. Type in your Xap Control Center user name and password.
3. Select a directory location for the download files.

3.3   The Communicator Control Box

1. You will see the Communicator Control Box, which contains 4 command buttons: **Connect Now**, **Manage Service**, **Preferences**, and **View Report**.
2. "Connect Now" lets you manually launch the file transfer process. "Manage Service" opens the Service Controller, which allows you to manage the Communicator as a service or an application. "Preferences" contains options to maintain a schedule for automatic downloads, to select the directory location, and set up pre and post processing tasks. "View Report" displays the Transfer Report which shows the status of transferred files, total record counts, and other details.

3.3.1   Communicator Operations

Service Controller

1. Click "Manage Service" to launch the Xap Communicator Service Controller.
2. Select "Run as a Service" command to operate the Communicator as a service that will automatically launch when the designated computer system is started – whether or not you log on to the system.
3. Select "Run as an Application" to operate the Communicator as a standalone application that is launched manually.
4. Select "Start the Service" to resume operating the Communicator as a service if it has been disabled.
5. Select "Stop the Service" to suspend the Communicator when it is operating as a service.

3.3.2   Download Preferences

3.3.2.1   *General Setup*

1. Click Preferences and then click the "General" tab.
2. The "Username" and "Password" text boxes contain the username and password you use to log on to Xap systems. The "Xap server" option identifies which server the Communicator will connect to for the file transfer process.
3. Select "Live" to receive applications submitted through your live Mentor site or select "Beta" to receive test applications submitted through your beta Mentor site.
4. You will see the "Log Activity" text box.
5. The "Log activity" text box shows the directory location for the log file. The "Log detailed info" option (default) will update the existing log file with new information; otherwise, the Communicator will over write the existing log file and create a new log file each transfer process. The log file records all download activity.
6. You can generally leave the 'Log detailed info' box unchecked except in debugging situations, as it enables verbose logging.

3.3.2.2   *Automatic Schedule*

1. Click "Preferences" and then click the "Schedule" tab to set the download schedule.

2. In the "Schedule Panel" click the "Change Automatic Schedule" button. This will open the "Schedule Preferences" dialog box.
3. To enable the schedule for automatic downloading, check "Enable automatic schedule".
4. Go to the dropdown box labeled "When" and select how often you want downloading to occur ("Daily at", "Hourly", or "Every").
5. If you select "Daily at" or "Every", a set of additional dropdown lists will appear directly to the right, allowing you to specify additional schedule parameters.
6. If you select "Daily at" you can set the time.
7. If you select "Every" you can select an interval amount and unit of time. For example of you select "Every 2 Days", "2" would be the interval amount and "Days" would be the unit of time.
8. Checking "Only between (and including) the times:" and "Only on the following days:" enables you to enter and set additional scheduling parameters.
9. Click "OK" to save the settings and close the scheduler. Or click "Cancel" to disregard the settings; or, click "Apply" to save the settings and remain in the scheduler.

3.3.2.3   Download Process

1. Click the "Download" tab to choose the location for the download file.
2. The "Download files" text box will appear. This text box shows the directory where the download files will be stored. For every slot your account is assigned to in the Download Manager, the Xap Communicator will produce a separate download folder.
3. Applications are written to a file with the name: (AppID)_MMDYYYYHHMISS.txt. For example, if your campus Application ID is 3333 and you downloaded the application at 6:00:05 AM, March 13, 2005, the file name will show as: 3333_03132005060005.txt

3.3.2.4   Post-Download Actions

1. You can choose to automatically open the application file as soon as it is downloaded by checking 'Perform post-processing on each downloaded file' and selecting an executable program.
2. You can also choose to send the files to a remote FTP host by checking "Send downloaded applications to FTP host" and filling in the appropriate information.
3. To set up post-download processing, click the "Preferences" command, click the "Download" tab, and then click the "Post-Download Actions" button.
4. If you want to run an external program, select the "Run a program or script" check box, and then click "Select Program" to locate the program. The Communicator will pass the download file name as the first parameter to the external program. The download file name must be called by the external program.

5. If you want to send the file to an FTP host, select the "Send the received file to an FTP host" check box. Type either the URL or the IP address to the FTP host, username, password, and directory, and then select the "Mode" option.

3.3.2.5   Manual Download

To manually download applications, click the 'Connect Now' command on main Xap Communicator control box. The download process will be identical to the scheduled auto-downloader.

3.3.3   Download Reports

3.3.3.1   Viewing Communicator Reports

Each time the Communicator performs the file transfer process, an activity report is generated that shows the status of the data transferred. To view the report, click the "Reports" command. Click the hyperlink to the selected downloaded file to view its contents. The report is updated each time the Communicator downloads (or uploads) new files.

3.3.3.2   Viewing Communicator Transfer Logs

Each time the Communicator downloads or uploads a file, an activity log is generated and saved to the directory specified in "Preferences". You can choose to maintain a single /continuous log file for all downloads and uploads, or you can create a new file with each download.