

Ellucian eTranscripts for Banner API Guide



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Overview

Parchment Send is a comprehensive process for current and former students to order transcripts and for administrators to receive and fulfill transcript requests. Parchment works with every institution to determine the best way to implement Parchment Send to optimize current business process and technical requirements.

Ellucian eTranscripts is a new set of functionalities native to Ellucian administrative systems, allowing any institution to automate the fulfillment of transcript requests. This automation will process the majority of transcript requests without any administrative effort—eliminating manual request entries from paper order forms, institutional handling of transcript fees, manual checking for holds, and even allowing Parchment to print and mail paper transcripts on the institution's behalf. This native solution for automation is one of many supported by the Parchment Send service. Since it is included as baseline functionality within Ellucian's administrative system, it can be implemented quickly, without additional cost, code, or development required.

Parchment's Support for Ellucian eTranscripts

Uncompromising Ellucian Support

As an Ellucian Community partner, Parchment will always provide compatibility with new versions and updates for Ellucian eTranscripts. Parchment maintains a dedicated test environment that can be used for testing with the institutional pre-production administrative system to test any Ellucian updates prior to institutional deployment.

Parchment is committed to providing the most advanced transcript exchange platform to serve the education community. Recently campus leaders surveyed across the country by higher education management trade publication *University Business* named Parchment a 2014 Readers' Choice Top Product.

Enhancements Available Only Through Parchment

The native eTranscripts from Ellucian provide a seamless way for the Ellucian ERP to communicate with Parchment, but there are some factors surrounding the core API functionality that Parchment's integration provides exclusively to Parchment members. Each of these features can be scoped and enabled as part of your overall project implementation.

- **Extensive Experience with Automation:** Parchment's extensive experience implementing integration across a wide array of institutional requirements ensures that each institution's unique requirements are understood. Parchment's suite of integration options allows every institution to choose the tools that are right for their environment. Ellucian eTranscripts is an important option within that suite of tools.

- **Data:** Parchment Send is the only platform that provides effortless data exchange, allowing an institution to deliver transcripts in data formats, including PESC XML and TS-130 EDI, using Ellucian eTranscripts. This means institutions do not have to maintain separate processes for sending transcripts as data to other institutions. Parchment automatically performs the conversion and delivery of data without any additional effort on the part of the institution.
- **Comprehensive Services for Paper & Electronic Fulfillment:** Parchment is a full service provider for transcripts, both delivered electronically, as well as those delivered as mailed paper. Parchment's integration supports requests for printed transcript and can deliver those requests to an institutional print queue, or to Parchment's secure transcript printing facility where most transcripts are printed and mailed the same business day.

Student Experience Considerations

In any automation project, there are a variety of functional requirements that need to be determined to create the student and staff experience desired. The [Parchment Send Implementation Guide: Ellucian](#) illustrates the functional considerations that should be factored into the overall project plan. At a high level, they include options for student identification and authentication, branding and messaging, the types of documents available for request, and options for request fulfillment.

Technical Considerations

Parchment has the most experience in the industry, having automated with Ellucian administrative systems since 2006, and can recommend the best integration path given an institutions requirements and resources. The [Parchment Send Implementation Guide: Ellucian](#) provides an in depth discussion of Parchment's implementation methodology and the series of calls and workshops that will guide the implementing institution through to a successful project.

The purpose of this document is to provide details specific to the Ellucian eTranscripts native solution, and enumerate the considerations unique to this SIS communication method. Parchment has identified the following technical considerations for review.

Parchment provides solutions to accommodate each of these considerations, to achieve the eTranscripts solution ideally suited for you. However, we feel it important to illustrate where some technical limitations to the native Ellucian eTranscript solution might impact you.

- **PDF Generation Tools:** Ellucian eTranscripts uses new, native PDF creation tools, built into the administrative system. These tools are based on new transcript generation processes. If the institution uses a report processing tool, such as eVisions or Crystal Reports, additional processes may need to be implemented by the institution to replace the native PDF tool.
- **Support for Custom Ellucian Code:** It is important to note that any modification to baseline Banner transcript tables or output could potentially break any upgrade path

to the API support. If the institution uses custom code to generate transcripts, another integration method, besides APIs, may need to be used to accommodate creation of the custom transcript.

- **Student Authentication:** Ellucian eTranscripts includes functionality to identify students who are not authenticated through the institution's portal, however, there are limitations to the required attributes that are collected for matching, and limitations on the returned student's attributes and academic record, such as available transcript types (e.g., undergraduate versus graduate). If requirements include offering different document types, indicators driving student experience must be sent via SSO.
- **Non-Transcript Support:** Ellucian eTranscripts does not support the automated fulfillment of any documents other than official transcripts and does not automate delivery of any records that are not completely contained within the administrative system. Institutions can use other Parchment fulfillment and automation tools to deliver such requests.

If any of these technical considerations impact you, and you wish to develop solutions, Parchment has ready code and solutions to help. Please raise your desired workflow during the functional workshop to ensure the proper solution is developed.

Ellucian eTranscript Requirements

To enable Ellucian eTranscripts, the following deployments and updates, available from Ellucian, must be made by the institution prior to beginning implementation.

Banner Student 8.6.2 eTranscript Release

The Student 8.6.2 release includes a number of specific updates for transcripts and has the following dependencies:

Student 8.6
General 8.6
Accounts Receivable 8.4.5

XE API updates are included in a WAR file to be deployed to WebLogic or Tomcat server, running JDK 1.6

DBEU – Database Extension Utility

Requirements for the DBEU are available from Ellucian's DBEU FAQ available in Ellucian Commons at:

<http://www.edu1world.org/CommonsBanner/wiki/document/4230>

Integration Components

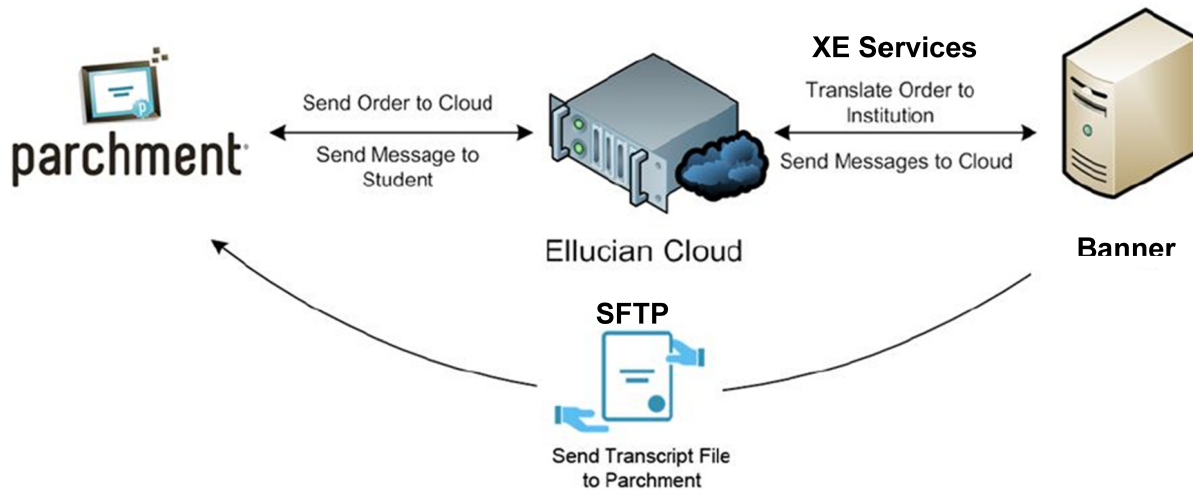
There are five required components that interact within the Ellucian eTranscripts solution.

- Parchment's hosted storefront, configured for accepting requests
- The Ellucian Cloud, providing connectivity between Parchment and the institution
- Banner XE services, supporting the real-time integration between these components
- The institution's Banner server, holding configuration and forms, as well as processing requests
- SFTP directly with Parchment for transcript file transfer and fulfillment

Ellucian eTranscripts bring automation to every step of transcript processing. Parchment provides a fully branded hosted storefront, which can be linked to the institutional portal, to allow secure requests of transcripts as well as other institutionally specific official documents. Requests that meet institutional automation criteria are securely transmitted to the Ellucian Cloud, an Ellucian hosted integration layer that is configured to accept requests for the institution.

The institution establishes a secure account within the Ellucian Cloud, and configures it with privileged access to the administrative system. With this access, the Ellucian Cloud can interact with the system to provide a number of services, including student matching, hold checking, transcript production, and fulfillment.

When a request can be automatically fulfilled, the transcript file will be produced by the administrative system and returned to Parchment via SFTP, where it will be customized to the institutions delivery requirements through the addition of institutional artwork, cover pages, and legend pages. Transcripts requested for delivery to an email address will also receive an institutionally specific digital signature to ensure the highest level of security and control on the delivered document.



Parchment Integration with Ellucian eTranscripts Overview

Additional components that can be implemented include SSO, Self-Registration, and support for other document types. These are scoped as part of the Functional Workshop and will be implemented as part of your overall project. Along with the new transcript related forms and jobs inside the Ellucian administrative system, Parchment provides robust administrative interfaces for managing order details, exceptions, request attachments, reporting, and more.

Implementation

Resources, Roles & Responsibilities

This list of roles required to successfully deploy this project. Your exact attendee list may vary and it is possible that a single person could fill one or more roles in the project.

Parchment Resources

Role	Responsibility
Regional Director	Advises and guides institutions towards mutually beneficial transcript processing solutions.
Account Executive	Manages the long term relationship with the institution to ensure all necessary support and assistance is provided.
Manager, Member Consulting Team	Oversees Project Management team and Implementation Specialists.
Project Manager & Business Analyst	Responsible for the overall planning, facilitation, and execution of the project. The Project Manager will also act as the lead business analyst, as the expert on the Parchment platform.
Manager, Application Services Team & Technical Lead	Facilitates the back end integration between Parchment and the Ellucian administrative system.
Implementation	Assists in the business analysis and configuration of the Parchment Send

Specialist	platform.
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Member Institution Resources

<u>Role</u>	<u>Responsibility</u>	<u>Associated Titles</u>
Project Sponsor	Makes critical business level decisions.	VP Student Services or Student Records, VP Enrollment, Registrar
Project Manager	Responsible for the planning, facilitation, and execution of the project in conjunction with Parchment's project team.	Project Manager, Registrar, Associate Registrar
Functional Lead, Business Analyst	Owns the overall business analysis for processing transcripts. Responsible for the test matrix design.	Business Analyst, Registrar, Assistant Registrar
Transcript Staff Representative	Responsible for day to day fulfillment of transcript requests and provides with the fulfillment/support process.	Transcript Staff Lead
SIS Administrator	Has access and ability to identify and execute functional changes to Banner SIS.	SIS Administrator, Assistant Registrar
Technical Lead	Has ability to own or assign a resource to develop the single sign on functionality from the student portal to the Parchment Send platform.	CTO, Assistant Registrar of Technology, Senior Developer
SIS Developer	Strong understanding of SIS tables, form, & PL SQL.	SIS Developer
Database Administrator (DBA)	Understanding of SIS database schema. Typically collaborates with Developer(s).	DBA
Systems Administrator	Grant access externally to the SIS system. Manage system-level tasks, such as SFTP access. Note: This may require the ability to navigate internal security policies.	Systems Administrator

Project Plan

Based on the [Parchment Send Implementation Guide: Ellucian](#) details the calls and workshops needed and provides specific agendas and tasks for each group the table below details the project plan for implementing Ellucian eTranscripts using the native APIs. Documentation will be provided prior to each call. Instructions specific to the API implementation are detailed below, numbered by their corresponding task in the table.

	<u>Task</u>	<u>Reference</u>	<u>Resource</u>	<u>Effort</u>	<u>Notes</u>
1	Attend		Parchment and	1	Parchment hosted, web-

	Introduction Call		Functional lead	hour	enabled conference call.
2	Review the readiness document.	<i>Ellucian eTranscripts Readiness</i>	Functional and Technical teams	4 hours	Review what is needed at your institution in order to be ready and able to install and use Ellucian eTranscripts.
3	Attend Kickoff Call		Parchment, Functional, and Technical teams	1 hour	Parchment hosted, web-enabled conference call.
4	Deploy or Verify required updates	Ellucian eTranscript Requirements section (detailed above)	Technical team		
5	Complete and Submit Ellucian Cloud Account Enablement form	Detailed instructions below.	Technical team	<1 hour	Ellucian will respond to the submitted form by providing Ellucian Cloud credentials to the institution within two business days.
6	Attend Functional Workshop		Parchment, Functional, and Technical teams	1 hour	Parchment hosted, web-enabled conference call.
7	Attend Technical Workshop		Parchment, Functional, and Technical teams	1 hour	Parchment hosted, web-enabled conference call.
8	Set up an SFTP connection for eTranscripts.	Banner eTranscript SFTP Setup	Technical team	<1 hour	Review these steps for use when setting up your test and later your production site connections.
9	Review how to set up and assign roles and permissions for the Ellucian Cloud.		Technical team	<1 hour	
10	Configure Ellucian Cloud Test Environment	Ellucian eTranscripts Cloud Configuration User Guide	Technical team	1 hour	
11	Configure eTranscript related forms	Related Forms: (SHAETAD, SHRTETC, SHRPDFT, GORCMRL, GORCMSC,	Technical team	8 hours	SGASTDN is required only if allowing future processing options for students.

		SOAXREF, SHATPRT, SHRETRN, SGASTDN)			
12	Review/Revise Ellucian baseline PDF Transcript output		Technical team	4 hours	
13	Attend Testing and Training Workshop		Parchment, Functional, and Technical teams	2 hours	Parchment hosted, web- enabled conference call.
14	Complete Test Plan		Functional team	18 hours	
15	Migrate Ellucian eTranscripts to Production		Parchment, Functional, and Technical teams	4 hours	

Contact information

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TECHNICAL SUPPORT

Go to exchange.parchment.com/support where you can search our Support Center for answers to questions. Make sure you're logged in first because we create special content just for you!

Or click **Submit a ticket** from the home page of our Support Center and someone from our technical support team will get back to you right away.