

## Procedures for Installation eTranscripts for a Division

The installation process for a division eTranscript implementation should be as follows:

1. **Division Identification** - State Services will confirm the participation of a division in the eTranscript project with the VDOE. State Services will then add them to the project plan.
2. **Gap Analysis** - Edustructures will initiate contact with the division to schedule the Gap Analysis. They will work with the Division to complete the Gap Analysis. When the Gap Analysis is complete, Edustructures will email the Gap Analysis to the State Services for approval to proceed.
3. **Confirm the Division Meets the Requirements for eTranscripts** - State Services and VDOE will contact the divisions and deliver the Gap Analysis with comments as to the division meeting the requirements. Divisions not meeting the requirements will need to be notified formally that the requirements are not met. State Services will notify Edustructures as to whether to proceed with installation or not.
4. **Scheduling** - Edustructures will contact division once the confirmation and notification above has been complete. A schedule of installation dates will be delivered to State Services based on the division's availability and the availability of Edustructures installers. State Services will update the plan for the divisions and deliver the custom project plan for the division to the division. Once the division has been confirmed to meet the eTranscript requirements, State Services will contact Edustructures providing the division eTranscript Project Manager's contact information so that Edustructures can begin the NTC Checklist information collection process.
5. **SFTP Server** – Once notified that a new division will be participating in Virginia Transcript Center, Edustructures will create the appropriate directory on the NTC SFTP server for that division.
6. **Complete Implementation Checklist in the Divisions** - Edustructures will send an email to the eTranscript Project Manager in the Division, identified by State Services, explaining the Implementation Checklist and instructions on how they should complete it. Any follow up on the checklist will be done by Edustructures.
7. **User Id/Set Up Enabling** - When the division returns the NTC checklist to Edustructures, Edustructures will configure the division within Virginia Transcript Center and the appropriate institutions will be assigned. At this point, no user accounts will be created so that no one will be enabled to log on to Virginia Transcript Center until the verification is completed. The exception is the person(s), designated by the eTranscript Project Manager in the division, as the verification/signoff person(s). Pearson will notify Edustructures whom that is. At

that point, Edustructures will create the account(s) for the verification/signoff person(s).

8. **Load Data** - Edustructures will then install the software necessary and configure the environment for data transmission on the dates specified in the plan. Data will be extracted using SIF and transmitted to State Services. State Services will then be notified that the data has been sent. Pearson Development will confirm that the division has been transmitted to NTC and configure any new divisions necessary for SFTP transmission. Pearson will notify Edustructures that the transmission has occurred and await confirmation from Edustructures that the data is in place within Virginia Transcript Center. This process of notifying will be for the first time the transmissions occur. Any subsequent transmissions after the first successful one will not require notification of State Services and Edustructures as the process is automated.
9. **Training on VRF** - This task maybe accomplished at anytime after the data has been loaded. Mass trainings are acceptable for this completion. The quicker we train the divisions, the less intervention will be need by Edustructures if the division needs to re-fulfill the VRF report manifest. Therefore timely training will be necessary. Until the point in which a division is trained, Edustructures will need to be available to resubmit data for the division. Training may be in the form of a Web-Ex Session or an online tutorial. It is the division's choice how they would like to receive VRF training.
10. **Verification and Data Validation of Completion for divisions** - State Services will create a separate Verification Report that will be added to the Gap Analysis. The Verification report will be sent to the person(s) that were identified as verification/sign off person(s) by the eTranscript Project Manager for the division. They will be asked to review a copy of the old transcript and the new Virginia Transcript Center transcript (PDF) and make data comparisons. We are not comparing format, but actual data accuracy. They are to make notes on the discrepancies and send them back to State Services. In addition, they will complete the verification checklist for each data element that we transmitted. Again, any discrepancies will be reported to State Services. State Services will notify the development and implementation teams if there are issues. Once the issues are resolved by the responsible party, State Services will contact the division contacts again for verification and signoff. This process will continue until the data is completely accurate. Any recommendations that are not a part of the Va Requirements will be logged as future enhancements by State Services.
11. **Training for Users in Divisions** - This task maybe accomplished at anytime after all user ids have been enabled in the division (note this is after verification). Mass trainings are acceptable for this completion. We can discuss pre-trainings, where the division is not enabled yet, if the need arises. Training will occur via Web-Ex sessions.

12. **Completion and Data Signoff for divisions** - This is the final step of installation. A division will return a signed Verification report or emailed one confirming all data is accurate to State Services.
  
13. **Activate IDs** - When the division signs off on the data accuracy, State Services will notify Edustructures that all user ids for the division can be enabled. Edustructures will then create the remaining accounts (in the NTC Implementation Checklist) and we will consider this a *production implementation*.

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