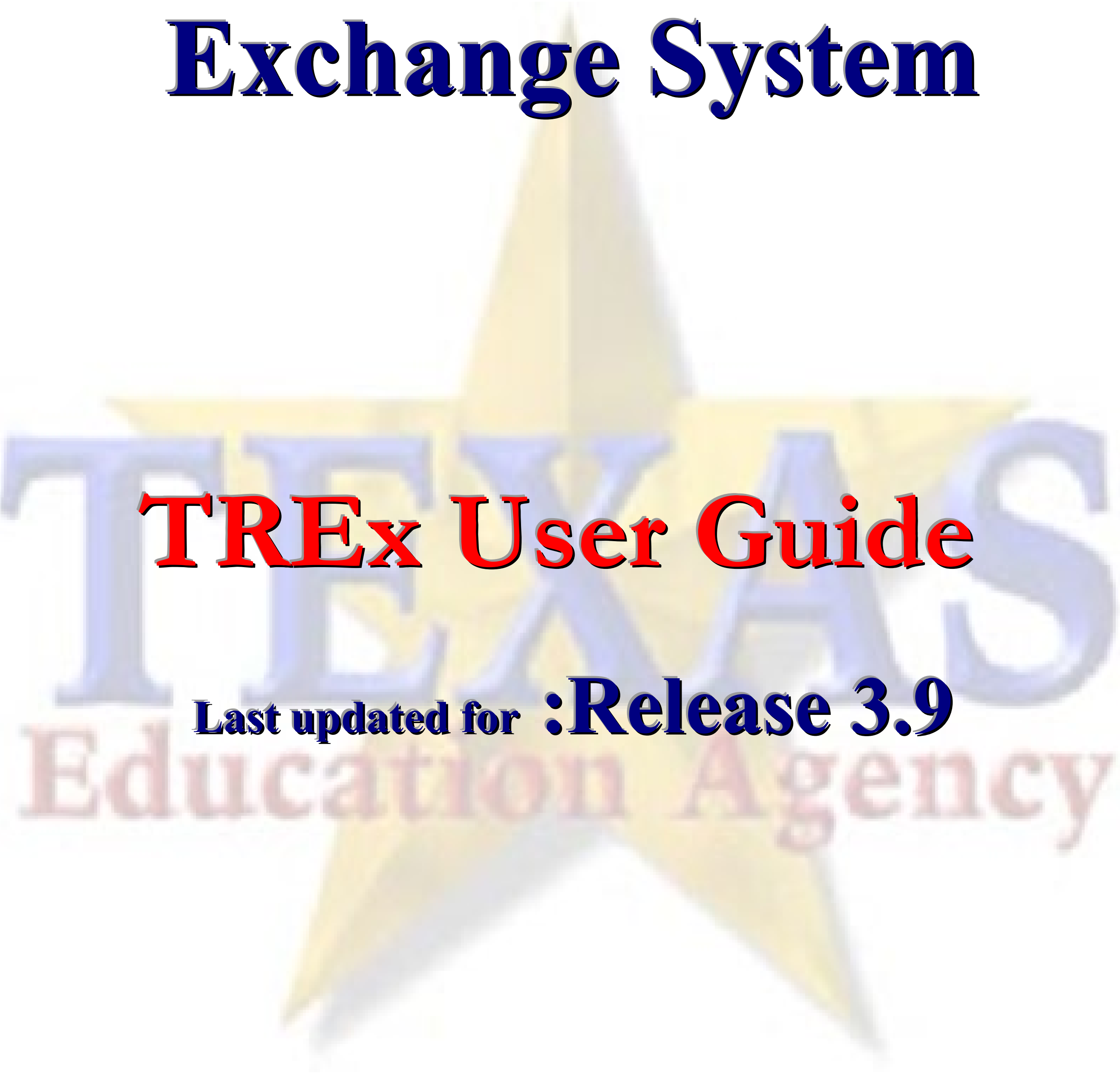
Texas Records Exchange System


TEXAS
Education Agency

TREx User Guide

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Introduction

The Texas Records Exchange system (TREx) enables institutions of all sizes to save time and money while fulfilling an important part of their mission - exchanging information about students' progress and competencies with other educational institutions.

The TREx provides a convenient and easy to use interface that enables authorized users to:

- Request records/transcripts from other institutions
- Send records/transcripts to other institutions
- Search TEA records for the last campus attended by a particular student
- Track inbound and outbound transactions
- Add or edit student data manually (once a record is created it can no longer be edited)
- Attach additional information to student records/transcripts
- Receive email notification of aged requests
- Ensure validation of data upload to TREx
- Reporting for evaluation of general performance and of electronic transfers
- Fulfill requests initiated by other institutions
- Receive record/transcript transmissions initiated by other institutions

Background

House Bill 1 from the 79th Legislature 3rd Called Session, 2006 (H.B.1), mandates Texas public schools' participation in the exchange of electronic student records using the Texas Records Exchange system (TREx). TREx is an Internet accessible, web-based application hosted by the Texas Education Agency.

According to the Student Records Exchange Senate Education Committee, "the objective of the project is to develop and deploy a web-based application for the exchange of electronic student records between Texas public school districts and for the submission of electronic transcripts to Texas public colleges and universities."

Data imports and exports from the Student Information System (SIS)

TREx accepts the upload of XML-based files extracted from local student information systems (SIS). These files are encrypted and temporarily stored on the TREx server. When the receiving campus accepts a record/transcript delivery, it can download the record/transcript from TREx.

Note: TREx does not update local student information systems with transmitted information. Implementation of either manual or automated processes to incorporate information transmitted by TREx is the responsibility of local districts or campuses.

Student records/transcripts stored on TREx are held for a maximum of ten working days and then are purged from the system. If you must send a student record/transcript again, after it has been purged, you must recreate the extract and upload it again.

District and TEA Policies

The primary purpose of TREx is to provide a means of transferring student records within Texas electronically. It provides the mechanism and tools to transfer a standardized set of student information between authorized campuses and districts. TREx does not change or supersede state or local policy in reference to transferring student information between campuses and districts.

Both state and federal law protect the right of access to student records. Entities that have access to students' private information must safeguard this information from unauthorized access. Student records/transcripts that are transmitted using TREx are encrypted during transmission and storage. Once a TREx user downloads student records/transcripts from TREx however, the responsibility for safeguarding the data falls to the receiving district or campus.

All users of TREx are required to follow the regulations of the Family Educational Rights and Privacy Act (FERPA). FERPA is a federal law that protects the privacy of student records and applies to all schools that receive funds under an applicable program of the US Department of Education.

Data Transfer Requirements and Authorization

Part 3, Section 3-4, "Withdrawal Procedures," of the current Student Attendance Accounting Handbook (SAAH) specifies that the minimum amount of information that must be transferred with a student moving from one Texas public school district to another is:

- Student's ID number (SSN or alternate state approved ID)
- Student's Prior ID number (SSN or alternate state approved ID if different from Student ID)
- Student's Local Student ID number (if used)
- County-District-Campus number
- Campus Name and Phone number
- Student's First, Middle, and Last Names and Suffix
- Student's Gender, Ethnicity, and Date of Birth
- Student's Current Grade level
- Student's Immunization Records

Part 3, Section 3-4, of the current SAAH states that enrollment in a school district constitutes authority for the sending district to release a student's education records regardless of whether parental authorization has been received. (Family Education Rights and Privacy Act (FERPA) 34 CFR Part 99, 99.31(a) (2) and 99.34).

By Texas law (TEC 25.002(a-1)), a district must respond to a request for a student record from the student's new district within 10 days of the request. A prompt transfer of the student's record is important for the student's instructional placement and for the new district's use fulfilling reporting requirements. TREx facilitates the request for student records and the response to these requests within the required time period.

TREx provides the student record exchange services mandated by H.B.1 and transfers additional information recommended by focus groups involved in the design and development of the electronic student records exchange application.

File naming conventions

TREx accepts two types of file uploads: the upload of XML extracts containing student records/transcripts and the upload of attachments that can be associated with a particular student record/transcript.

Student record extracts must be named according to the following convention:

```
[last four][LastName]_[FirstName]_stu
```

where

- [last four] is the last four digits of the student ID
- [LastName] is the student's last name
- [FirstName] is the student's first name
- **stu** is the file descriptor indicating that the file is a student record

For example, an extract for Fourth Student, student ID 000990004, would be named:

```
0004Student_Fourth_stu
```

Attachments to student records must be named according to the following convention:

```
[last four][LastName]_[FirstName]_[descriptor][sequence number]
```

where

- [last four] is the last four digits of the student ID
- [LastName] is the student's last name
- [FirstName] is the student's first name
- [Descriptor] is one of the following two letter codes describing the type of attachment
    - le - Limited English Proficiency
    - im - Immunization record
    - gt - Gifted/Talented(GT) attachment such as a GT profile
    - ms - Miscellaneous

    - ot - Other - to be used when the district does not wish to indicate what is contained in the document
    - tl - Transcript Legend
- [sequence number] a two digit numeric code (01-99) to allow for multiple document attachments of the same type
    - ms 81-89 are reserved for Disciplinary Action attachments
    - ms 91-99 are reserved for Individual Education Plan (IEP) attachments

For example, attachments for Fourth Student, student ID 000-99-0004, would be named:

```
0004Student_Fourth_im01 an immunization record
0004Student_Fourth_ms81 a Disciplinary Action statement
0004Student_Fourth_ms82 a second Disciplinary Action statement
0004Student_Fourth_ms91 an IEP attachment
```

About the Texas Records Exchange system (TREx)

The Texas Records Exchange system (TREx) enables academic institutions to request and send student information with other institutions and to track these information exchanges for follow up using a convenient and intuitive interface.

The following topics give you an overview of how the TREx works:

About TREx data flow (p. v)
A few request scenarios (p. vi)
About user roles (p. viii)

About TREx data flow

The TREx is the data store and intermediary for participating institutions. When an institution requests a transcript from you, the TREx assigns a tracking number to the transaction and forwards the request to you.

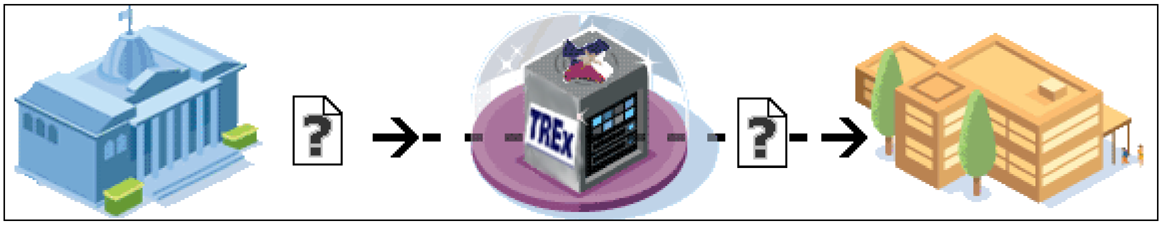


Figure 1: A request is submitted to TREx and routed to the target institution

When you receive a request, the first step in fulfilling the request is uploading the requested record/transcript to the TREx, or optionally, entering the student information using the Manual Data Entry (MDE) process.

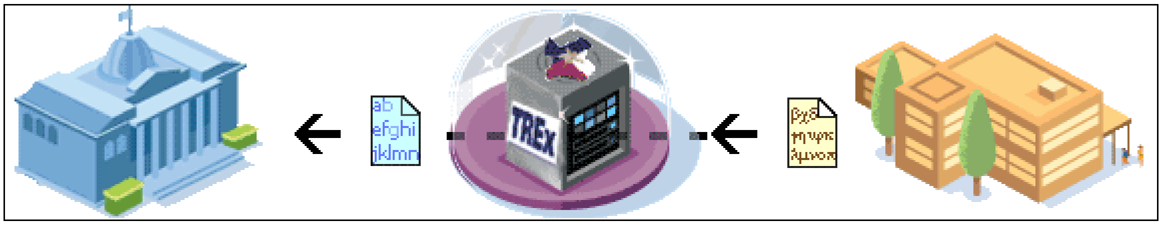


Figure 2: The record/transcript is sent to TREx which translates it and sends it to the requestor

TREx validates the student record/transcript to be sure the data meets Texas Education Agency data standards. If the record/transcript is being sent to a post secondary institution, TREx also translates the record/transcript to the SPEEDE format (used by Texas public post-secondary institutions) and then forwards the record/transcript to the requesting institution.

A few request scenarios

The following scenarios show some different ways in which a request transaction can be completed.

The student attended the institution, the request has enough identifying information to fulfill the request, and there are no impediments to sending the record/transcript

step 1 **Request** - Akins High School requests a record/transcript for Fourth Student from Bowie High School and the request is sent to Bowie High School's **Inbound Requests** queue.

step 2 **Fulfill** - Bowie High School uploads the student's record/transcript to the TREx and it is sent to the Akins High School's **Inbound Records/Transcripts** queue.

step 3 **Accept** - Akins High School accepts the record/transcript, which completes the transaction.

The student attended the institution, the request has enough identifying information to fulfill the request, but the most current semester's grades have not yet been posted

step 1 **Request** - Akins High School requests a record/transcript for Fourth Student from Bowie High School and the request is sent to Bowie High School's **Inbound Requests** queue.

step 2 **Hold** -Bowie High School places the request on hold for grades.

step 3 **Fulfill** - When the grades are posted, Bowie High School uploads the student's record/transcript to the TREx and it is sent to Akins High School's **Inbound Records/Transcripts** queue.

step 4 **Accept** -Akins High School accepts the record/transcript, which completes the transaction.

The student identifying information is not specific enough to determine whether the request can be fulfilled

step 1 **Request** - Akins High School requests a record/transcript for Fourth Student from Bowie High School and the request is sent to Bowie High School's **Inbound Requests** queue.

step 2 **Reject** - Bowie High School rejects the request with a note that explains: "there is more than one Fourth Student, neither with the date of birth supplied, please check the date of birth and/or supply addition information such as middle name and gender". The transaction appears in Akins High School's **Rejected Outbound Requests** queue.

step 3 **Resend** - Akins High School resends the request, adding identifying information and correcting the date of birth. The request appears in Bowie High School's **Inbound Requests** queue.

step 4 **Fulfill** - Bowie High School uploads the student's record/transcript to the TREx and it is sent to Akins High School's **Inbound Records/Transcripts** queue.

step 5 **Accept** -Akins High School accepts the record/transcript, which completes the transaction.

The student never attended the institution

step 1 **Request** - Akins High School requests a record/transcript for Fourth Student from Bowie High School and the request is sent to Bowie High School's **Inbound Requests** queue.

step 2 **Reject** - Bowie High School rejects the request with a note that explains: "We have no record of Fourth Student. Perhaps try Jim Bowie High School."

step 3 **Resend** - The transaction appears in Akins High School's **Rejected Outbound Requests** queue. Akins High School checks the information and resends the request to Jim Bowie High School.

step 4 **Fulfill** - The request appears in Jim Bowie High School's **Inbound Requests** queue. Jim Bowie High School uploads the student record/transcript to the TREx and it is sent to Akins High School's **Inbound Records/Transcripts** queue.

step 5 **Accept** - Akins High School accepts the record/transcript, which completes the transaction.

An identical request was fulfilled two days ago

step 1 **Request** - Akins High School requests a record/transcript for Fourth Student from Bowie High School and the request is sent to Bowie High School's **Inbound Requests** queue.

step 2 **Reject** - The Bowie High School registrar remembers the name and does a search on the student's name. The student's history shows that the same request was fulfilled two days ago. The registrar rejects the request with a note explaining: "We just sent this record/transcript two days ago with transaction number 0001234567".

step 3 **Recall** - The request appears in Akins High School's **Rejected Outbound Requests** queue. Akins High School looks up the transaction number, sees that this is the case and recalls the request, which completes the transaction.

About user roles

The user role that you are assigned determines the workflows to which you have access. Most users will be either a **Viewer** or a **Registrar**. In addition, your TREx account will have a scope. User accounts may be single campus, or multi-campus in scope. Multi-campus accounts may encompass one district or more districts, all of the districts affiliated with an Education Service Center (ESC), or all of the districts within the state of Texas.

Viewer users can generate and view reports about transactions within their scope (single or multi-campus).

Registrar users can generate reports and can also enter and upload student records/transcripts, initiate and respond to record/transcript requests, and initiate and accept record/transcript deliveries.

Single-campus users can only work with transactions sent or received by their own campuses. Multi-campus users can only work with transactions sent or received by the campuses for which their account is configured.

Note: Multi-campus users can only create and respond to record/transcript transactions of one campus at a time. However, multi-campus users can generate reports that cover multiple campuses at a time.

There are other, special-purpose account types. For example, a vendor account provides TREx access for the purpose of testing XML extracts from a local system.

This account enables the vendor to upload and validate test records to ensure that the extraction process is implemented correctly, but does not allow any other kind of TREx transactions.

The National Option

The **National Option** is an optional service offered to TREx users by the National Transcript Center (NTC). The National Option enables institutions to send records/transcripts to private colleges and universities within Texas and to over 125,000 public and private academic institutions outside of the state of Texas.

There is a nominal per-record/transcript fee charged to TREx users for sending records/transcripts using the National Option.

If your district signs up for the National Option service, your TREx experience will be changed in the following ways:

- When sending records/transcripts, you will be able to see many more institutions when choosing transaction recipients.
- Workflow pages for sending records/transcripts will have an indicator next to

each delivery specified that will incur a transaction fee.

- Workflow summary pages will show a total of fees incurred by the deliveries specified.

Private School Access to TREx

Private schools are now allowed access to TREx. The user experience for a TREx private school user differs only slightly from that of a public school user.

Student record/transcript validation takes into account the variation in practice in both course planning and record keeping in private schools. Student records that are either uploaded or entered using Manual Data Entry (MDE) are validated differently for private schools in the following ways:

- Student ID numbers are not constrained to the same rules as public school IDs
- Student coursework entry allows for courses that span more than two semesters

Student record requests are treated differently to ensure the safeguarding of student social security numbers and other confidential data. When requesting a record a private school user:

- must use the last four (and only the last four) digits of a student's social security number as the student ID when requesting a record.
- does not have access to the PID search tab when choosing a request recipient.

About student documents

Student documents can include:

- *student records/transcripts* (p. ix)
- *student record/transcript attachments* (p. ix)
- *transcript legends* (p. x)

Student academic records/transcripts include a listing of the student's attempted and earned academic credits, and the grades associated with these credits, plus additional required information such as immunization and disciplinary action incidents.

Student records/transcripts are either *imported* (p. ii) in XML format, or entered by hand using the *Manual Data Entry* (p. 44) process.

Student record/transcript attachments

If you need to send additional information with a student's academic records, you can add file attachments to individual student records/transcripts using the **Manage records** workflow.

Once you add attachments to a student record/transcript, they remain attached to the record until you remove them. When the record/transcript is sent to another PK-12 institution, the attachments are sent with it.

Note: Attachments are not included in record/transcript deliveries sent to post-secondary institutions unless you have the National Option.

If you have the National Option, attachments are included in deliveries to post-secondary institutions selected from the National Option tab.

Attachments are uploaded, stored, and downloaded as is. No translation or transformation is performed. Therefore, it is best to use file formats that can be read by any TREx recipient's operating system, such as pdf, text, or html.

Transcript legends

Registrar users can upload a transcript legend using the Administration section on the TREx home page. The transcript legend can include such information as a key to letter grades and scales and other information that is useful to a third party when interpreting a record/transcript. Transcript legends must be a file in PDF format. Once a transcript legend is uploaded for your institution, it will be appended to every record/transcript sent from your institution.

Using TREx online help

Each TREx page has a link to online help in its upper right corner. When you click the link, the online help will open to the topic appropriate to your current TREx workflow. For example, if you are on your **Home** page and click the **Need help?** link, the help describing the **Home** page will be presented.

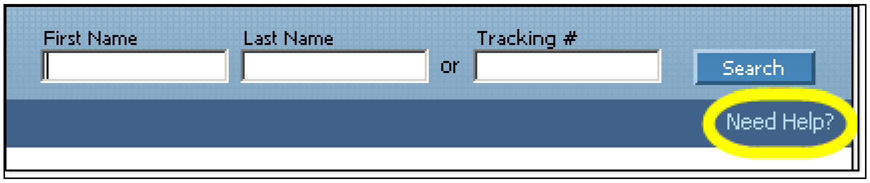
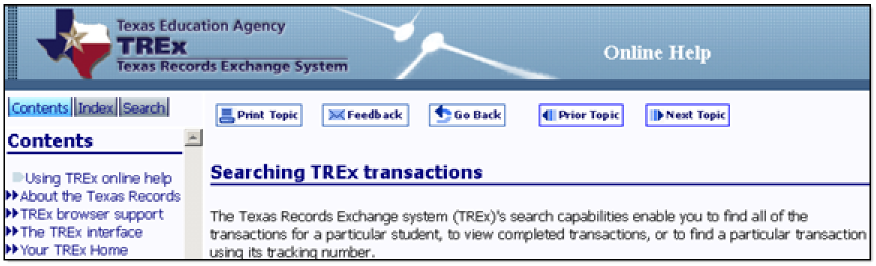

First Name
Last Name
or
Tracking #
Search
Need Help?

Figure 3: The link to online help is located in the upper right area of each page

When there is more than one topic associated with a particular workflow, you are presented with the associated topics and can choose from among them by clicking the appropriate link.

Help Contents, Index, and Search panes

The **Contents**, **Index**, and **Search** panes give you different ways to find information.


Texas Education Agency
TREx
Texas Records Exchange System
Online Help
Contents
Index
Search
Print Topic
Feedback
Go Back
Prior Topic
Next Topic
Contents
Using TREx online help
About the Texas Records
TREx browser support
The TREx interface
Your TREx Home

Searching TREx transactions

The Texas Records Exchange system (TREx)'s search capabilities enable you to find all of the transactions for a particular student, to view completed transactions, or to find a particular transaction using its tracking number.

Figure 4: Online help navigation

The **Contents** pane resembles the table of contents of a traditional book. It is a sequential listing of help topics. The Contents pane uses a show/hide icon to enable you to view only main topics or to view sub-topics as well.

The **Index** pane resembles a book index. It enables you to look for topics using key words and phrases.

The **Search** pane provides a full text search of the online help topics. You can search for a word or phrase that you type in **Search** box.

Help Navigation Buttons

The online help also provides navigation buttons to help you move between topics.

Feedback

When clicked, opens an email client window so that you can provide user feedback about the current help topic. The email is pre-populated with the help topic ID and description so that an information specialist can use your feedback to improve the appropriate topic.

Print Topic

When clicked, submits the current topic to your printer.

Go Back

When clicked from the main help window, pages back to the topic that was visited just before this topic. When clicked from a UI popup window, closes the UI popup window.

Prior Topic

When clicked, pages to the topic that precedes the current topic in the **Contents**.

Next Topic

When clicked, pages to the topic which follows the current topic in the **Contents**.

Main Topic

When clicked, pages to the workflow topic that contains the current sub-flow topic.

Links within help topics

▶ Expanding block

When clicked, shows a hidden block of text that has more details about the topic or a relevant sub-topic. Sub-flow tasks are shown in expanding blocks.

▼ Hide block

When clicked, hides a block that was expanded.

➡ Jump

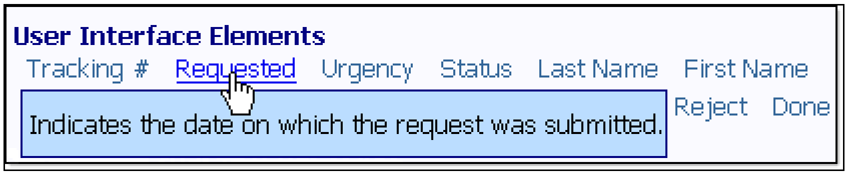
When clicked, changes the main help window's topic to the linked topic. You can return to the previous topic by clicking the **Go Back** button.

UI popup window

When clicked, opens a new window so that you can see a picture of the TREx page referred to without losing your place in the current topic. A User Interface (UI) popup window shows a picture of the TREx page and also has definitions of the UI elements on that page.

UI element

When moused over, UI element links show a brief explanation of the term under the mouse cursor. These links are usually found within a UI popup window.



Indicates the date on which the request was submitted.

Figure 5: A user interface element popup definition

The TREx interface

The TREx interface is designed around workflows - sequences of tasks that you must perform to accomplish a particular goal. You can start the main workflows from your *Home* (p. 19) page, which is the first page you see when you log in.

In addition to workflows, the TREx uses a variety of user interface controls that help you find the information you need including *list controls* (p. xii) and *search fields* (p. xiii).

The TREx also offers context sensitive *online help* (p. x).

TREx browser support

The TREx web application supports several browsers including:

- Firefox 1.5 or higher
- Internet Explorer 6.0 or higher
- Safari 2.0 or higher

You must configure the following browser features to use the TREx:

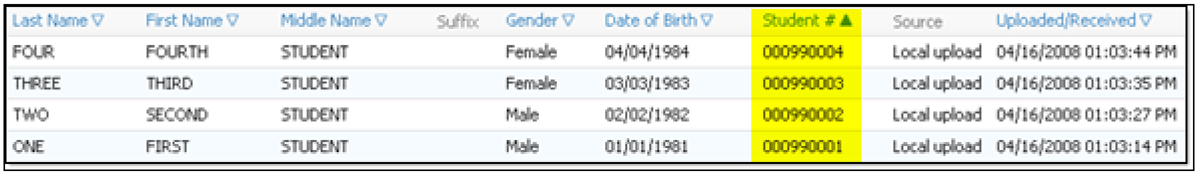
- Turn on JavaScript
- Turn on cookies

Turn on JavaScript and cookies in Internet Explorer (p. 69)
Turn on JavaScript and cookies in Firefox (Windows) (p. 69)
Turn on JavaScript and cookies in Firefox (Macintosh) (p. 70)
Turn on JavaScript and cookies in Safari (p. 71)

List controls

There are several controls that help you work with lists when using the TREx. You can control sorting, pagination, and list searching/filtering to find information quickly and efficiently.

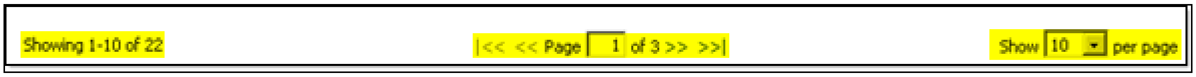
Column sorts - you can sort columns in ascending (1,2,3) or descending (3,2,1) order by clicking any column label that has a blue arrow next to it. Clicking a column header sorts by that column and toggles between ascending (a,b,c; 1,2,3) and descending (z,y,x; 9,8,7) sorts.



Last Name ▽	First Name ▽	Middle Name ▽	Suffix	Gender ▽	Date of Birth ▽	Student # ▲	Source	Uploaded/Received ▽
FOUR	FOURTH	STUDENT		Female	04/04/1984	000990004	Local upload	04/16/2008 01:03:44 PM
THREE	THIRD	STUDENT		Female	03/03/1983	000990003	Local upload	04/16/2008 01:03:35 PM
TWO	SECOND	STUDENT		Male	02/02/1982	000990002	Local upload	04/16/2008 01:03:27 PM
ONE	FIRST	STUDENT		Male	01/01/1981	000990001	Local upload	04/16/2008 01:03:14 PM

Figure 6: This list is sorted by Date of Birth. Therefore, that arrow is solid blue; other arrows are outlined in blue.

The column by which the list is sorted has a solid blue arrow next to its label. All other columns have arrows outlined next to their column labels.



Showing 1-10 of 22

|<< << Page 1 of 3 >> >>|

Show 10 per page

Figure 7: List paging controls change how many items are shown per page and move through the pages.

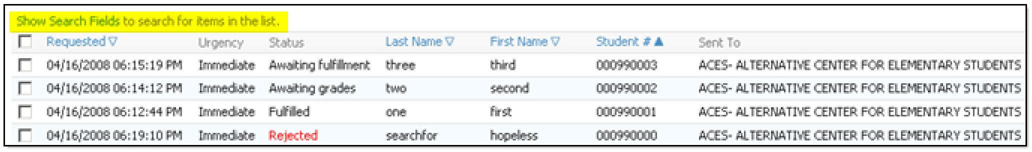
Page through lists - If there is more than one page of list items, the paging controls above the list filters are activated. The following paging controls are available when applicable:

- **|<<** - go to first page of the list
- **<<** - go to previous page of the list
- **>>** - go to next page of the list
- **>>|** - go to final page of the list

Show [number] per page - specifies the maximum number of list items shown per page. Selecting a larger number of items per page decreases the number of pages it takes to display a long list.

Search Fields

Search fields - You can choose to show or hide search fields for most lists. If search fields are hidden, click the **Show Search Fields** link to make the search fields visible. If search fields are visible, click the **Hide Search Fields** link to make them disappear.

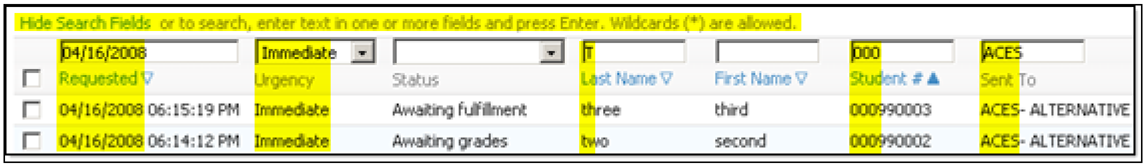


Show Search Fields to search for items in the list.

☐	Requested ▽	Urgency	Status	Last Name ▽	First Name ▽	Student # ▲	Sent To
☐	04/16/2008 06:15:19 PM	Immediate	Awaiting fulfillment	three	third	000990003	ACES- ALTERNATIVE CENTER FOR ELEMENTARY STUDENTS
☐	04/16/2008 06:14:12 PM	Immediate	Awaiting grades	two	second	000990002	ACES- ALTERNATIVE CENTER FOR ELEMENTARY STUDENTS
☐	04/16/2008 06:12:44 PM	Immediate	Fulfilled	one	first	000990001	ACES- ALTERNATIVE CENTER FOR ELEMENTARY STUDENTS
☐	04/16/2008 06:19:10 PM	Immediate	Rejected	searchfor	hopeless	000990000	ACES- ALTERNATIVE CENTER FOR ELEMENTARY STUDENTS

Figure 8: A list with search fields hidden has a Show Search Fields link.

When the search fields are visible, you can specify criteria to filter the list items displayed. For example, entering **D** in the Last Name search box limits list items to those having a Last name that starts with "D".



Hide Search Fields or to search, enter text in one or more fields and press Enter. Wildcards (*) are allowed.

	Requested ▽	Urgency	Status	Last Name ▽	First Name ▽	Student # ▲	Sent To
	04/16/2008	Immediate		T		000	ACES
☐	04/16/2008 06:15:19 PM	Immediate	Awaiting fulfillment	three	third	000990003	ACES- ALTERNATIVE
☐	04/16/2008 06:14:12 PM	Immediate	Awaiting grades	two	second	000990002	ACES- ALTERNATIVE

Figure 9: A list with search fields visible

Text boxes - Almost all text box search entries match the first characters of the search term entered. Dates, however, must be a full match of month, day, and year.

Text box search terms take effect when you press **Enter** on your keyboard.

Drop down lists - You can select any of the values from a drop down list filter. These values are pre-defined according to the type of information held in that column.

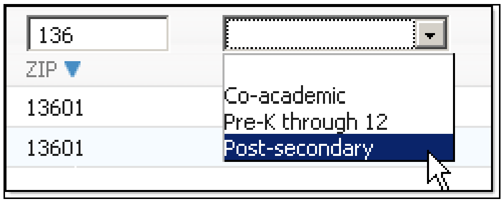


Figure 10: Search fields can be text entry fields or drop down lists.

Drop down list search fields take effect as soon as you make a choice.

About password security

! Caution: It is very important that you keep your TEAL password a secret. Your password provides access to confidential student information.

Passwords for TEAL must conform to the following rules;

- Must be at least 8 characters long and contain at least;
  - one capital letter
  - one lower case letter
  - one number and
  - one special character.
- Any one character cannot be used more than twice.
- You may not repeat a previous password

You can create stronger passwords by following the following guidelines:

- Use non-alphabetic characters such as numbers and punctuation marks in your password. For example, **F33d-back** is more secure than **F33dback**, which is more secure than **Feedback**.
- Do not use words that can be found in a dictionary.
- Do not use an easy-to-guess password such as the name of a spouse, child, or pet or other words or numbers, such as birth dates, that are associated with you.

Regardless of the password you choose, safeguard your login by following these guidelines:

- Change your password regularly.
- Do not write your password down.
- Do not share your password with anyone.

If you need more help

For problems with the TREx web application or the TREx online help, contact support at TREx@tea.state.tx.us.

Reset a forgotten password

If you forget your TREx password, you can request a new password. A temporary password will be sent to the email address listed in your TEAL contact information.

Prerequisites

- You must have access to the email account associated with your TEAL account.

Note: If you have forgotten your user name, forgotten your email address, do not have an email address registered with the system or have been locked out, contact the help desk at (512) 463-9229 and choose option 5 from the menu, or send an email message to trex@tea.state.tx.us for assistance.

» To reset your forgotten password

step 1 Open a browser window and type in the TEAL url:

`https://pryor.tea.state.tx.us/`

The TEAL login page opens.

step 2 Click the link labeled **Forget your password?**

The **Reset Password (p. 75)** page opens.

step 3 Fill in your TEAL **User Name** *and* click **Submit**.

You will be prompted to answer the security question that you set up when you first set up your TEAL account.

Note: Your answer must match exactly the original answer that you supplied, including capitalization, punctuation, etc.

step 4 Enter the answer to the security question and click **Continue**.

The **Change Password** page opens.

step 5 Enter a new password.

Select a new password using the password rules indicated below;

- It must be at least 8 characters long and contain at least;
  - one capital letter
  - one lower case letter
  - one number and
  - one special character.
- Any one character cannot be used more than twice.
- You may not repeat a previous password

Searching TREx transactions

The Texas Records Exchange system (TREx)'s search capabilities enable you to find all of the transactions for a particular student, to view completed transactions, or to find a particular transaction using its tracking number.

Look up transactions by student name (p. xvii)

View completed transactions (p. xvii)

Look up a transaction by tracking number (p. xviii)

Look up transactions by student name

You can look up a student's TREx transaction history using the student's first and last names as search criteria. The search boxes are at the top right of every TREx page.

Note: The TREx performs a metaphone search. That is, your search will return records for students whose names sound like the names you enter. For example, searching for a last name "Four" will return the last name "For".

» To retrieve a student's transaction history by name

step 1 Log in to the Texas Records Exchange system (TREx).

step 2 Enter the first name or first initial and the last name in the text boxes at the top of the page and click **Search**.

The **Search results** (p. 77) page opens, showing a list of students who are close or exact matches for the name you entered.

Note: It is possible to have the same student appear more than once in the list because one or more of the basic identifying fields differ between records. For example, the same name may be listed separately if the date of birth for that name differs between two transactions.

step 3 Click **Details**.

The **Transaction Details for [student name]** (p. 77) page opens, showing the transactions in which your institution has participated, for that student.

step 4 Click on a particular tracking number to see more information about that transaction.

step 5 The **Details for [transaction type and number]** (p. 78) page opens.

step 6 Click **Done** to return to the **Search results** page.

step 7 Click **Done** again to return to your **Home** page.

View Completed Transactions

You can view completed transactions to which you have been a party.

» To view completed transactions

step 1 Log in to the Texas Records Exchange system (TREx).

step 2 Click **View completed transactions**.

The **Completed Transactions** (p. 78) page opens, showing a list of transactions that have been completed.

Note: Requests are complete when they have been fulfilled and accepted or when they have been recalled. Deliveries are complete when they have been accepted or when they have been recalled.

step 3 View a completed item's history by clicking its tracking number.

The **Details for Tracking # [number]** (p. 78) page opens, showing the transaction's status, the submission details, and a history of its status changes from creation through completion.

Look up a transaction by tracking number

You can track a transaction to which you are a party using the **Tracking #** search box that appears at the top of every TREx page.

» To look up a transaction by tracking number

step 1 Type in the **Tracking #** in the search box at the top of the TREx page and click **Search**.

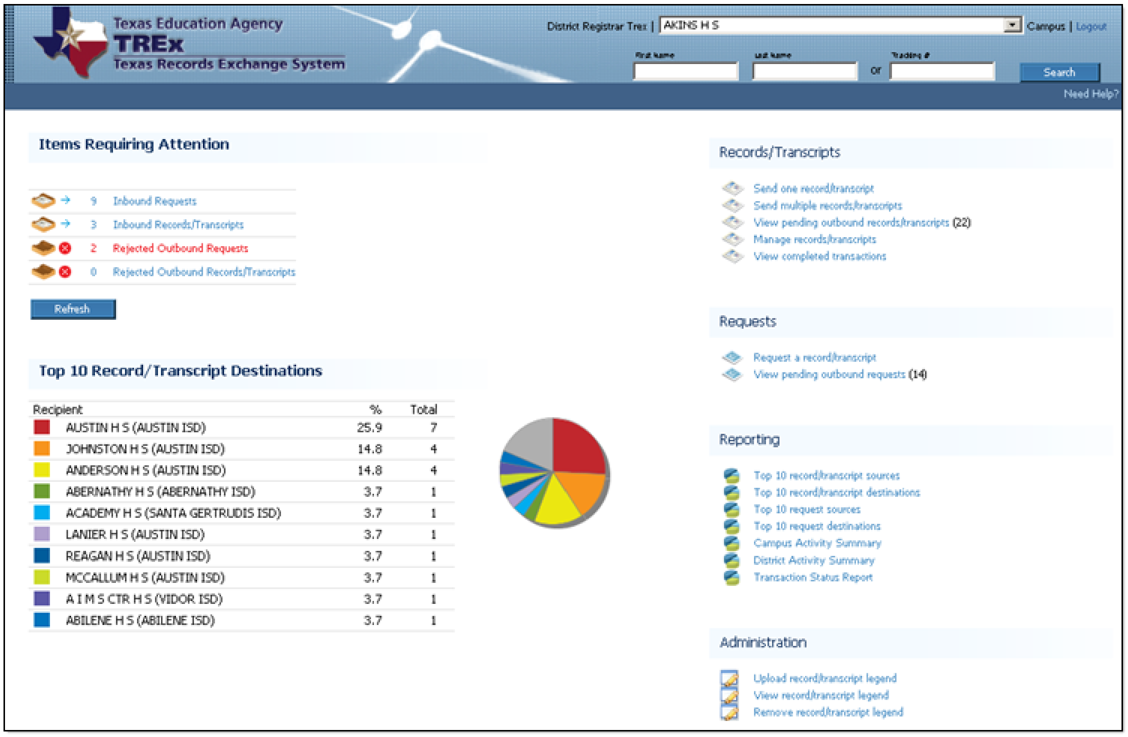
The *Details for [transaction type, tracking number]* (p. 78) page opens. It displays the current status of the transaction, transaction details, and a history of the transaction's status.

step 2 Click **Done** to return to your Home page.

Tip: You can also *search for transactions by student name* (p. xvii).

Home page

Your TREx **Home** page contains links to the workflows that you are authorized to use. These links are organized according to the type of transaction the workflows manage.


Texas Education Agency
TREx
Texas Records Exchange System
District Registrar Trex | AKINS H S
Campus | Logout
First name
Last name
or
Tracking #
Search
Need Help?
Items Requiring Attention
9 Inbound Requests
3 Inbound Records/Transcripts
2 Rejected Outbound Requests
0 Rejected Outbound Records/Transcripts
Refresh
Top 10 Record/Transcript Destinations
Records/Transcripts
Send one record/transcript
Send multiple records/transcripts
View pending outbound records/transcripts (22)
Manage records/transcripts
View completed transactions
Requests
Request a record/transcript
View pending outbound requests (14)
Reporting
Top 10 record/transcript sources
Top 10 record/transcript destinations
Top 10 request sources
Top 10 request destinations
Campus Activity Summary
District Activity Summary
Transaction Status Report
Administration
Upload record/transcript legend
View record/transcript legend
Remove record/transcript legend

	Recipient	%	Total
🟥	AUSTIN H S (AUSTIN ISD)	25.9	7
🟧	JOHNSTON H S (AUSTIN ISD)	14.8	4
🟨	ANDERSON H S (AUSTIN ISD)	14.8	4
🟩	ABERNATHY H S (ABERNATHY ISD)	3.7	1
🟦	ACADEMY H S (SANTA GERTRUDIS ISD)	3.7	1
🟪	LANIER H S (AUSTIN ISD)	3.7	1
🟦	REAGAN H S (AUSTIN ISD)	3.7	1
🟨	MCCALLUM H S (AUSTIN ISD)	3.7	1
🟪	A I M S CTR H S (VIDOR ISD)	3.7	1
🟦	ABILENE H S (ABILENE ISD)	3.7	1

Figure 11: The TREx Home page (Registrar view).

Depending on the role assigned to you, one or more of the following sections may appear on your home page:

[Top] (p. 20) - shows information about the user currently logged in, provides a way to search for transactions by tracking number or student name. *District, ESC, and TREx-level users* (p. 23) also have a control to select an affiliated campus at the top of the **Home** page.

Items Requiring Attention (p. 20) - provides access to the inbound requests, inbound records/transcripts, rejected outbound requests and rejected outbound records/transcripts workflows.

Records/Transcripts (p. 21) - provides access to the send one record/transcript, send multiple records/transcripts, view pending outbound records/transcripts, manage records, and view completed transactions workflows.

Requests (p. 21) - provides access to the request a record/transcript and the view pending outbound request workflows.

Reporting (p. 22) - provides access to reports about the 10 most frequent sources of incoming and destinations of outgoing requests and records/transcripts. Depending on your account permissions, additional reports (**Activity Summaries**) may also be available.

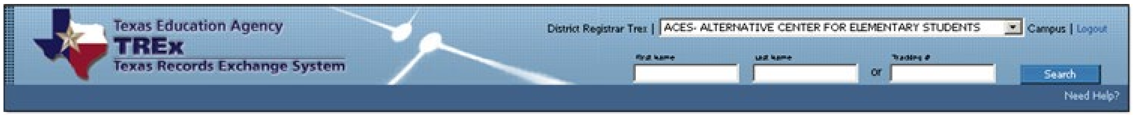
Administration (p. 23) - provides access to the View legend, Remove legend, and Upload legend workflows.

Home - Top section

[Top]

The top of most TREx pages, including your **Home** page, shows the name of the user who is currently logged in, a **Logout** link, access to user profile search tools, and user help.

If you are a District or ESC-level user, you also have a control that enables you to switch between affiliated campuses.



District Registrar Trex | ACES- ALTERNATIVE CENTER FOR ELEMENTARY STUDENTS

Figure 12: The top section of the Home page

User Interface Elements

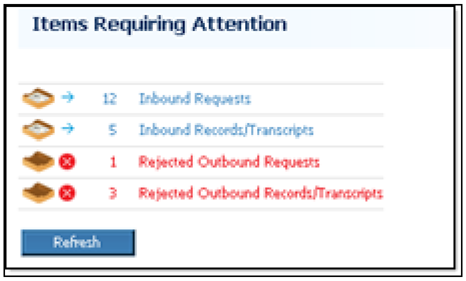
Workflows

Look up transactions by student name (p. xvii)

Select an affiliated campus (p. 23)

Home - Items Requiring Attention section

The **Items Requiring Attention** section shows counts of the items that are queued for your response. Clicking a queue link opens the appropriate workflow.



Items Requiring Attention

12	Inbound Requests
5	Inbound Records/Transcripts
1	Rejected Outbound Requests
3	Rejected Outbound Records/Transcripts

Figure 13: The Items Requiring Attention section of the Home page.

Workflows

Inbound Requests (p. 25)

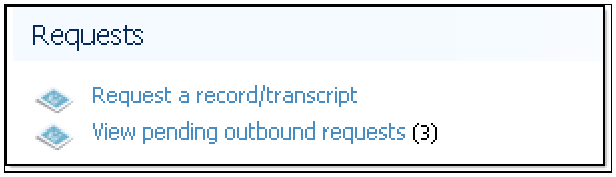
Inbound Records/Transcripts (p. 29)

Rejected Outbound Requests (p. 31)

Rejected Outbound Records/Transcripts (p. 33)

Home - Requests section

The **Requests** section provides links to the workflows that request records/transcripts or monitor requests.


Requests

Request a record/transcript

View pending outbound requests (3)

Figure 14: The Requests section of the Home page.

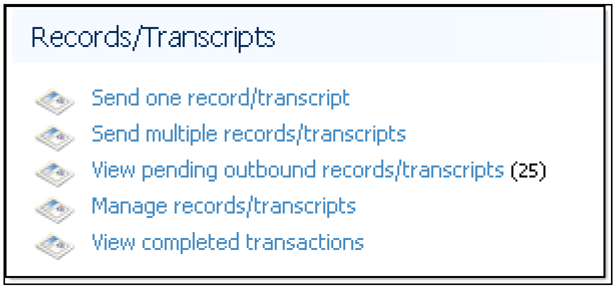
Workflows

Request a record/transcript (p. 36)

View pending outbound requests (p. 31)

Home - Records/Transcripts section

The **Records/Transcripts** section provides links to workflows that send, manage, or monitor outbound student records/transcripts.


Records/Transcripts

Send one record/transcript

Send multiple records/transcripts

View pending outbound records/transcripts (25)

Manage records/transcripts

View completed transactions

Figure 15: The Records/Transcripts section of the Home page.

Workflows

Send one record/transcript (p. 39)

Send multiple records/transcripts (p. 41)

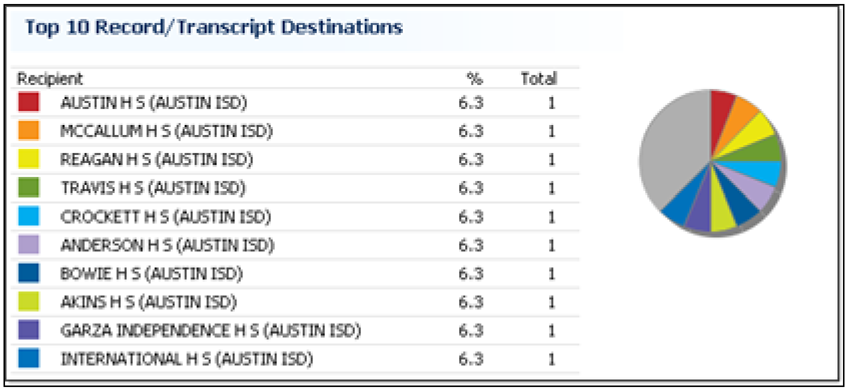
View pending outbound records/transcripts (p. 33)

Manage records (p. 43)

View completed transactions (p. xvii)

Home - Top 10

The **Performance** section shows you a current summary of TREx activity.



Top 10 Record/Transcript Destinations

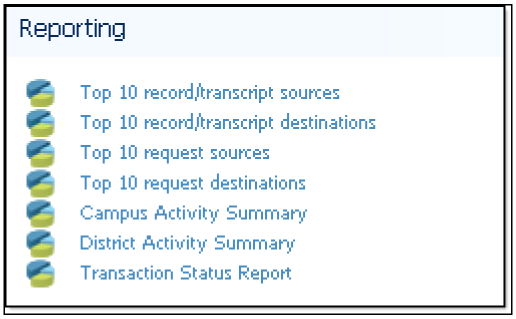
	Recipient	%	Total
🟥	AUSTIN H S (AUSTIN ISD)	6.3	1
🟧	MCCALLUM H S (AUSTIN ISD)	6.3	1
🟨	REAGAN H S (AUSTIN ISD)	6.3	1
🟩	TRAVIS H S (AUSTIN ISD)	6.3	1
🟦	CROCKETT H S (AUSTIN ISD)	6.3	1
🟪	ANDERSON H S (AUSTIN ISD)	6.3	1
🟦	BOWIE H S (AUSTIN ISD)	6.3	1
🟨	AKINS H S (AUSTIN ISD)	6.3	1
🟪	GARZA INDEPENDENCE H S (AUSTIN ISD)	6.3	1
🟦	INTERNATIONAL H S (AUSTIN ISD)	6.3	1

Figure 16: The Performance section of the Home page

Home - Reporting section

The **Reporting** section provides links to reports that show the composition of your institution's TREx transactions. Users have access to relevant Top 10 reports. For example, single campus users can see Top 10 reports, Campus Activity summaries, and Transaction Status reports for their campuses.

Multi-campus users can see additional reports such as District Activity summaries, and the scope of Transaction Status reports can cover entire districts instead of single campuses.



Reporting

- Top 10 record/transcript sources
- Top 10 record/transcript destinations
- Top 10 request sources
- Top 10 request destinations
- Campus Activity Summary
- District Activity Summary
- Transaction Status Report

Figure 17: The Reporting section of the Home page.

Reports

Top 10 Reports (p. 53)

Campus Activity Summary (p. 55)

District Activity Summary (p. 56)

Transaction Status Report (p. 59)

The **Administration** section provides links to workflows that show, upload, and remove your institution's transcript legend. If no record/transcript legend has been uploaded, only the link to the **Upload record/transcript legend** workflow is shown.

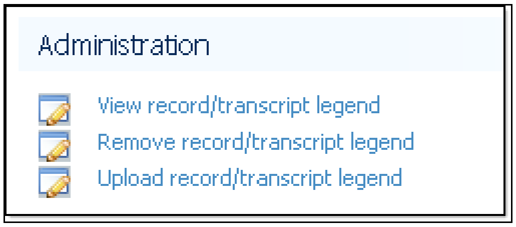

Administration
View record/transcript legend
Remove record/transcript legend
Upload record/transcript legend

Figure 18: The Administration section of the Home page.

Workflows

View transcript legend (p. 64)

Remove transcript legend (p. 63)

Upload transcript legend (p. 63)

District, ESC and TREx Users

The type of operations you can perform using TREx depend on whether you have a Viewer or Registrar account. The campuses on which you can perform these operations depend on whether you have a Campus, District, ESC, or TREx level account.

District, ESC and TREx users have access to more than one affiliated campus. When creating or managing transactions and records/transcripts, a district, ESC or TREx user can only work with one school at a time. Transaction reports, however, can be run for individual schools or for all schools to which the user has access.

District, ESC and TREx level workflow:

Select an affiliated campus (p. 23)

Select an affiliated campus

District, ESC, and TREx level users may have access to multiple campuses in their areas of responsibility. The operations a multi-campus user can perform depend on whether the multi-user account has Registrar or Viewer access.

Note: You do not have to select a campus from your Home page if you wish to run a multi-campus report such as a **District Activity Summary** or a **Transaction Status Report**.

» To select an affiliated campus

step 1 Log in to your TREx account.

Your **Home** page opens.

step 2 At the top of your **Home** page, click the **Campus** drop-down list to display the campuses to which you have access.

step 3 From the campus list, select the campus with which you want to work.

The campus name is displayed at the top of your **Home** page.

Note: To prevent confusion, you can only select a campus from your **Home** page. Until you select another campus, all statistics and operations to which you have access are related to the campus whose name is displayed at the top of subsequent TREx pages.

Inbound Requests

Inbound requests are requests for records/transcripts sent to you by other institutions. Inbound requests can be:

- Fulfilled - you send the requested record/transcript to the institution.
- Rejected - you cannot send the requested record/transcript either because of something more you need from the requesting institution, or for some other reason, such as no such student ever attended your institution.
- Put on hold - the record/transcript cannot be sent until grades are posted.

Workflows

Fulfill an inbound request (p. 25)

Reject inbound requests (p. 26)

Hold inbound requests (p. 27)

Fulfill an inbound request

Fulfilling an inbound request includes matching the inbound request with a student record and sending that record to the requesting institution.

Note: You can fulfill one request at a time.

» To fulfill an inbound request

step 1 Log in to the Texas Records Exchange system (TREx).

step 2 Click **Inbound Requests**.

The **Requests sent to [your institution]** (p. 81) page opens, listing inbound requests for records/transcripts.

step 3 Check the box next to the record/transcript request you want to fulfill.

step 4 Click **Fulfill**.

The TREx attempts to match the request you selected with records that you currently have on the TREx.

The **Select Record/Transcript** (p. 81) page opens, listing any matches or partial matches for the requested records/transcripts shown.

If there is not a match (p. 26).

step 5 Click the button next to the matching record.

step 6 Click **Next**.

The **Confirm and Submit** (p. 82) page opens. The request information and the record that you have matched with it are shown. Any fields that do not match are highlighted in yellow.

step 7 If you want to send a message with the record/transcript, enter it in the optional message box.

step 8 Check box that electronically "signs" your delivery.

step 9 Click **Send**.

The **Results** (p. 83) page opens, showing you a summary of the transaction, including a tracking number that you can use to track the request fulfillment.

If there is not a match

The workflow might not detect a matching record for one of two reasons: the identifying information in the request contains errors that make an automated match impossible, or the matching record has not yet been uploaded to the TREx.

» If there is not a match

step 1 Click **Search for Record/Transcript** to show a list of your records currently available on the TREx.

Fields in the list items that match the request's fields are shown in bold type. If you don't find a matching record, you must *upload the record* (p. 43) to the TREx.

step 2 Once you have uploaded the record, click **Search for Records/Transcripts** and find the record you uploaded.

Reject an Inbound Request

Requests that you cannot fulfill as entered should be rejected. For example, if an inbound request lacks sufficient identifying information or you have no record for the requested student, reject the request. When you reject a request, you can include a reason for the rejection to help the requesting institution expedite resolution of the transaction.

Tip: Requests that cannot be fulfilled yet, because of grades, should be *placed on hold* (p. 27), not rejected.

» To reject inbound requests

step 1 Log in to the Texas Records Exchange system (TREx).

step 2 Click **Inbound Requests**.

The **Requests sent to [your institution]** (p. 81) page opens, listing inbound requests for records/transcripts.

step 3 Check the box next to each request that you want to reject.

step 4 Click **Reject**.

You are prompted to enter a reason for the rejection.

Note: You can reject one or more requests at a time. If you reject more than one request in the same batch, the same reason for rejection will be sent to each originator.

step 5 Enter the reason and click **OK**.

The requests are rejected and removed from your queue.

Hold inbound requests

In some cases, it may be better to hold a request until grades are posted. A hold for grades is imposed when grades for the most recent term have not yet been recorded.

» To hold inbound requests

step 1 Log in to the Texas Records Exchange system (TREx).

step 2 Click **Inbound Requests**.

The **Requests sent to [your institution]** (p. 81) page opens, listing inbound requests for records/transcripts.

step 3 Check the box next to each of the requests you want to hold for grades.

step 4 Click **Hold for Grades**.

You are asked to confirm that you want to hold the selected requests for grades. You can also enter an explanation for the hold.

step 5 Click **OK**.

The selected requests are assigned a status of **Awaiting Grades** and your inbound requests queue is updated.

Note: If you put more than one request on hold at the same time, any optional message text that you enter at that time will be associated with each of the requests.

Inbound Records/Transcripts

Inbound records/transcripts must be either accepted or rejected. Accepting a record/transcript completes the request or delivery transaction. The transaction is removed from your inbound records/transcripts queue and the record/transcript is made available from your Manage Records page.

Rejecting a record/transcript returns the transaction to the sender. You can reject a record/transcript because you need more information or because it was sent to you in error.

Workflows

Accept inbound records/transcripts (p. 29)

Reject inbound records/transcripts (p. 29)

Accept a Student Record

You must accept inbound records before you can download them.

» To accept inbound records/transcripts

step 1 Log in to the Texas Records Exchange system (TREx).

step 2 Click **Inbound Records/Transcripts**.

The **Records/Transcripts sent to [your institution]** (p. 85) page opens, listing any inbound records/transcripts.

Tip: If you have so many items in the list that it is hard to find what you are looking for, use the *search fields* (p. xiii) to find a specific record/transcript or to narrow down the list.

step 3 Check the box next to each record/transcript that you want to accept.

step 4 Click **Accept**.

A message informs you that the selected records/transcripts were accepted and transferred to **Manage Records**.

From the **Manage Records** (p. 103) page, you can view, download, or delete the records/transcripts.

Reject inbound records/transcripts

If you need more information, or if a record is sent to you in error, you can reject the delivery. Rejected records appear in the sender's Rejected records queue.

Tip: Although entering a reason for rejections is optional, including a message can expedite the successful resolution of transactions.

» To reject inbound records/transcripts

step 1 Log in to the Texas Records Exchange system (TREx).

step 2 Click **Inbound Records/Transcripts**.

The **Records/Transcripts sent to [your institution]** (p. 85) page opens, listing any inbound records/transcripts.

Tip: If you have so many items in the list that it is hard to find what you are looking for, use the *search fields* (p. xiii) to find a specific record/transcript or to narrow down the list.

step 3 Check the box next to each record/transcript that you want to reject.

step 4 Click **Reject**.

You are prompted to enter a reason for the rejection.

step 5 Type in the reason and click **OK**.

The selected inbound records/transcripts are rejected and removed from your queue.

Outbound Requests

To check the status of requests that you have made but which have not been fulfilled, you can click the **View pending outbound requests** link on your **Home** page. To review and either resend or recall rejected requests, you can click the **Rejected Outbound Requests** link on your **Home** page.

Workflows

View pending outbound requests (p. 31)

Rejected Outbound Requests (p. 31)

View pending outbound requests

Pending outbound requests include all requests that you have sent to other institutions that have not been fulfilled and accepted or rejected and recalled.

» To view pending outbound requests

step 1 Log in to the Texas Records Exchange system (TREx).

step 2 Click **View pending outbound requests**.

The **Requests sent from [your institution]** (p. 87) page opens, showing a list of your pending outbound requests.

step 3 To view more information about a request, click **Details**.

step 4 To view a request's full history, click the tracking number in the details popup.

You can resend or recall rejected requests:

Resend a rejected request (p. 32)

Recall a rejected request (p. 32)

Rejected outbound requests

» To manage rejected outbound requests

step 1 Log in to the Texas Records Exchange system (TREx).

step 2 Click **Rejected Outbound Requests**.

The **Your Rejected Requests** (p. 88) page opens.

step 3 To see more information about a request, click **Details**.

Tip: When you place your mouse cursor over the **Details** link without clicking, any message associated with the transaction will be shown adjacent to your mouse cursor.

step 4 Based on the reason the request was rejected, resend or recall the request.

Workflows

Resend a request (p. 32)

Recall a request (p. 32)

Tip: If the rejecting institution did not say why the request was rejected, resend the request and use the optional message field to ask why it was rejected.

Resend a request

If a request that you initiated is rejected by the institution from which you requested a record/transcript, you can edit your request and resend it.

» To resend a request

From the **Requests sent from [your institution]** page or the **Your rejected requests** page:

step 1 Check the box next to the request you would like to send again.

step 2 Click **Resend**.

The *Enter Student Information* (p. 91) page opens, with the choices from your request filled in.

step 3 Edit choices if necessary and click **Next**.

The *Select Institution* (p. 91) page opens.

step 4 Choose the recipient institution and click **Next**.

step 5 The *Confirm & Submit* (p. 93) page opens.

step 6 If necessary, enter a clarifying message for the request recipient.

step 7 Click **Send**.

The *Results* (p. 93) page opens, showing you the results of your request.

Note: When you resend a record/transcript request, the tracking number is changed, but the original tracking number is shown on the **Details for request** page.

Recall a request

If you find that a rejected request was made in error, you can recall the request.

» To recall a request

From the **Requests sent from [your institution]** page or the **Your rejected requests** page:

step 1 Check the box next the request you want to recall.

step 2 Click **Recall**.

You are asked to confirm the recall.

step 3 Click **OK**.

The request is recalled and your pending outbound request queue is updated.

Outbound records/transcripts

Outbound records/transcripts, also known as outbound deliveries, are the records/transcripts that you send to other institutions. Outbound deliveries may be records/transcripts that you send in response to a request initiated by another institution, or they may be records/transcripts whose transmission you initiate in response to a walk-in, mail-in, or Internet request from a student.

From the **Home** page users can view their pending outbound deliveries and can resolve rejected outbound records/transcripts.

Workflows

View pending outbound records/transcripts (p. 33)

Rejected outbound records/transcripts (p. 33)

View pending outbound records/transcripts

Pending outbound records/transcripts are deliveries that have not been completed yet.

» To view pending outbound records/transcripts

step 1 Log in to the Texas Records Exchange system (TREx).

step 2 Click **View pending outbound records/transcripts**.

The **Records/Transcripts sent from [your institution]** (p. 89) page opens, showing deliveries that have not yet been completed.

step 3 Click the **Details** link for a record/transcript transaction to see more information about it.

Tip: When you place your mouse cursor over the **Details** link without clicking, any message associated with the transaction will be shown adjacent to your mouse cursor.

You can resend or recall rejected records/transcripts:

Resend rejected outbound records/transcripts (p. 34)

Recall rejected outbound records/transcripts (p. 34)

Rejected outbound records/transcripts

Rejected outbound records/transcripts are records/transcripts that you have sent to another institution that the recipient has chosen to reject instead of accept. When an outbound record/transcript is rejected, check the tracking details for that transaction to see if the recipient has noted why the record/transcript was rejected. If you resend a rejected record/transcript, it will appear in the recipient's **Inbound records/transcripts** queue again, with a new tracking number.

If you recall a rejected record/transcript, the transaction is marked as complete, the item is removed from your queue, and no further action is required.

» To manage rejected outbound records/transcripts

step 1 Log in to the Texas Records Exchange system (TREx).

step 2 Click **Rejected Outbound Records/Transcripts**.

The **Your rejected records/transcripts** (p. 90) page opens.

step 3 Click the Details link for a record/transcript transaction to see more information about it.

Tip: When you place your mouse cursor over the **Details** link without clicking, any message associated with the transaction will be shown adjacent to your mouse cursor.

You can resend or recall a rejected record/transcript.

Workflows

Resend rejected records/transcripts (p. 34)

Recall rejected records/transcripts (p. 34)

Resend rejected outbound records/transcripts

If you believe a record/transcript was rejected accidentally, or if you can provide more information to the recipient, you can resend a record/transcript.

Tip: Mouse over the **Details** link to see if the recipient sent a message when rejecting the record/transcript.

» To resend rejected outbound records/transcripts

From the **Your rejected records/transcripts** page:

step 1 Check the box next to each record/transcript you would like to send again.

step 2 Click **Resend**.

You are asked to provide a reason for sending the records again.

step 3 Type a reason in the text entry box and click **OK**.

The records are sent and your queue is updated.

Recall rejected outbound records/transcripts

If you find that a rejected record/transcript was sent in error, you can recall the delivery.

Tip: Mouse over the **Details** link to see if the recipient sent a message when rejecting the record/transcript.

» To recall rejected outbound records/transcripts

From the **Your rejected records/transcripts** page:

step 1 Check the box next to each record/transcript whose transmission you want cancel.

step 2 Click **Recall**.

You are asked to confirm that you want to recall the deliveries.

step 3 Click **OK**.

The records/transcripts are recalled.

Request a record/transcript

To get a copy of a student's records, send a record/transcript request to the institution.

Prerequisites:

- Know the student's first name, last name, and *date of birth* (p. 37)
- Know the name and location of the institution

» To request a record/transcript

step 1 Log in to the Texas Records Exchange system (TREx).

step 2 On your TREx home page, click **Request a record/transcript.**

The **Enter Student Information** (p. 91) page opens.

step 3 Enter as much identifying information about the student as you can.

Note: You must enter at least the first name, last name, and date of birth.

step 4 Select the **Urgency** of your request.

step 5 Click **Next**.

The **Select Institution (p. 91)** page opens.

step 6 Select the institution from which you want to request a record/transcript.

step 7 Click **Next**.

The **Confirm & Submit** (p. 93) page opens.

step 8 Confirm that the student information and the institution chosen are correct .

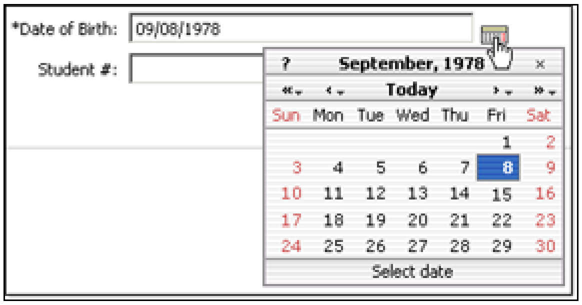
step 9 Enter a message to accompany your request (optional).

step 10 Click **Send**.

The **Results** (p. 93) page opens and shows you the status of your request, including the tracking number that you can use to monitor the request's progress.

About the student's Date of Birth

When you enter a date in TREx date fields, you can type in the date or, when the calendar control is available, you can select the date from a popup calendar.



*Date of Birth: 09/08/1978

Student #:

?	September, 1978					×
«▾	‹▾		Today		›▾	»▾
Sun	Mon	Tue	Wed	Thu	Fri	Sat
					1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30

Figure 19: Use the calendar control to enter dates.

The calendar control

The calendar control, when available, is located next to each date field that accepts entries. Clicking the small calendar icon opens the calendar. The single arrows change the date by one month, the double arrows change the date by one year.

Typing in a date

You can type in a student's **Date of Birth** using the following formats:

- Month - written or numeric. For example, `July` or `07`

Note: If you choose to spell out the month, you must use a comma between the day and the year. For example, `July 14,02`

- Day - numeric only. For example, `4` or `04`.
- Year - two or four digit numeric. For example, `88` or `1988`.
- Separator - either a forward slash or a period. For example, `07/04/88` or `07.04.88`.

Note: If you enter a two digit year, it is assumed that the year is less than 100 years before the current year. For example, if you enter the year as `23` the year will be assumed to be `1923`. If you enter the year as `02` the year will be assumed to be `2002`.

Note: The **Select Institution** page has different tabs to help you select the request recipient: the **Most Frequently Used Institutions** tab, the **Search for an Institution** tab, and, for public schools only, the **PID Search** tab.

Send a record/transcript

Using the **Send one record** workflow, you can send one student's record/transcript to one or more institutions.

» To send one record/transcript

step 1 Log in to the Texas Records Exchange system (TREx).

step 2 Click **Send one record/transcript**.

The **Select Record/Transcript** (p. 95) page opens.

step 3 Select the record that you want to send:

- If you have not uploaded the record, *upload the record to the TREx* (p. 43).
- Click the button next to the record that you want to send.

step 4 Click **Next >>**.

The **Select Recipients** (p. 95) page opens.

step 5 To specify an institution as a recipient:

5a Click either the **Most Frequently Used Institutions** tab or the **Search for Institutions** tab.

Note: Institutions with the National Option can also use the **Search for National Option Institutions** tab.

5b Find the institution in the list of available institutions.

5c Click **Select** in the left column of the institution's listing.
The institution is added to the **Recipients** list.

5d Continue to add recipients as needed.

step 6 Click **Next >>**.

The **Review Exit Level Assessments** (p. 96) page opens.

step 7 Determine the source (Uploaded from SIS or Texas Assessment Systems Data) of each assessment you want to be used for the transcript data.

7a Click the radio button in front of each assessment you choose to use.

step 8 Click **Next>>**.

step 9

The **Confirm and Submit** (p. 97) page opens. It shows the information that you have specified and also lists a tracking number for the transaction.

step 10 Check the information that you have specified for the transfer. You can add a note to accompany the record/transcript at this stage, but it is not required.

step 11 Check box that electronically "signs" your delivery.

Note: If you are sending a record/transcript to both a PK-12 institution and a post-secondary institution you will have two boxes to check.

step 12 Click **Send**.

The **Results** (p. 97) page opens, showing the transactions and tracking numbers created for each recipient institution.

Send multiple records/transcripts

You can use the **Send multiple records/transcripts** workflow to send several students' records/transcripts to the same recipient.

» To send multiple records/transcripts

step 1 Log in to the Texas Records Exchange system (TREx).

step 2 Click **Send multiple records/transcripts**.

The **Select Records/Transcripts** (p. 99) page opens.

step 3 Click **Select** next to each student's name whose transcript you wish to send.

When you click **Select**, the record is added to the **Selected Students** list.

step 4 Click **Next**.

The **Select Recipient** (p. 99) page opens.

step 5 To specify an institution as a recipient:

5a Click either the **Most Frequently Used Institutions** tab or the **Search for Institutions** tab.

Note: Institutions with the National Option can use the **Search for National Option Institutions** tab.

5b Find the institution in the list of available institutions.

5c Click **Select** in the left column of the institution's listing.

The institution is shown as the **Recipient**.

step 6 Click **Next>>**.

The **Review Exit Level Assessments** (p. 100) page opens.

step 7 Determine the source (Uploaded from SIS or Texas Assessment Systems Data) of each assessment you want to be used for the transcript data.

7a Click the radio button in front of each assessment you choose to use.

step 8 Click **Next>>**.

The **Confirm and Submit** (p. 100 page opens.

step 9 Enter a single message that will be sent with each record. Note: Messages cannot be sent to Colleges and Universities with transcripts.

step 10 Review the information that you have specified.

step 11 Check box that electronically "signs" your delivery.

step 12 Click **Send**.

The records/transcripts are sent to the TREx to be translated and forwarded to the recipient.

The **Results** (p. 101) page opens, showing the results of your transactions, including the tracking numbers.

Manage Student Records

You can upload, download, create, edit, and view your records that are stored on the TREx using the **Manage Records** workflow. You can also add and remove attachments to student records/transcripts that you have uploaded or created.

Workflows

Upload records/transcripts to the TREx (p. 43)

Create or edit a student record/transcript using Manual Data Entry (MDE) (p. 44)

Remove records/transcripts from the TREx (p. 50)

Add an attachment to a student record/transcript (p. 49)

Download records/transcripts from the TREx (p. 50)

Upload records to the TREx

Before you can send a record/transcript to another institution, you must upload it to the TREx data center.

Prerequisites:

- The records to be uploaded must be in a properly formatted file.
- You must be able to browse to the record file from the computer which is logged in to the TREx.

Note: You can upload records from within the **Manage Records** workflow or from within any of the workflows that send student records/transcripts to other institutions.

» To upload records to the TREx

step 1 From the **Manage Records for [your institution]** (p. 103) page or from the **Select Record/Transcript** page, click **Upload**.

The **Upload Records for [your institution]** (p. 104) page opens.

step 2 Click **Browse...** to browse for and select the record file to be uploaded.

step 3 Click **Upload**.

An upload progress bar shows the various stages of the upload process. When the process is finished, a confirmation box tells you how many records were uploaded.

If your record/transcript extract does not meet TEA data standards, the record will not be saved. Make note of the errors generated by the validation process and correct them and then try the upload again.

Note: Most record/transcript uploads will generate validation warnings, but this will not prevent the records from being saved on the TREx server. Only records with errors will be rejected.

step 4 Click **OK**.

Note: After you upload records, you are returned to the workflow from which you started.

Create or edit a student record using Manual Data Entry (MDE)

If you cannot produce an extract file for a particular student, you can enter, edit and save that student's information using the Manual Data Entry (MDE) interface. The MDE provides the ability to enter or edit the minimum required information and supplemental information about a student's record/transcript.

The MDE process is divided into seven steps:

step 1 *Enter Student and School Data* (p. 44)
step 2 *Enter Enrollment and Academic Data* (p. 45)
step 3 *Enter Current Coursework* (p. 45)
step 4 *Enter Completed Coursework* (p. 46)
step 5 *Enter Assessments* (p. 47)
step 6 *Validate Manually Entered Data* (p. 48)
step 7 *Confirm and Create Student Record* (p. 49)

Note: On the Student and School Information and the Enrollment / Academic Information pages, you cannot advance to the next step of data entry until you fill in all fields marked with an asterisk (*).

Manual Data Entry Step 1 - Enter Student and School Information

The first step in the Manual Data Entry process consists of entering **School and Student Information**. This information includes identifying and demographic information about the student, and contact information about the sending institution. In addition, this step includes the means to enter parental, immunization, and disciplinary action information.

» To enter student and school information in Manual Data Entry

step 1 From the **Manage Records** (p. 103) page, click **Create** (or **Edit** if editing an existing record/transcript).

The **Student and School Information** (p. 105) page opens. This provides the interface to enter or edit identifying information about the student, the school, the student's parents, immunization history, demographics, and disciplinary actions.

step 2 Enter the Student and School information.

Note: You must supply all information marked with an asterisk (*). You cannot save your work, nor can you advance to the next step of Manual Data Entry until all required fields of Student School Information have been entered.

step 3 Click **Save**.

The information that you have entered so far is saved.

step 4 Leave the **Student and School Information** data entry tab:

- To continue the manual data entry process, click **Next>>**.

  Step 2 - **Enrollment/Academic Information** starts.

- To leave additional steps for a later time, click **Cancel**.

  You are returned to the **Manage Records** page.

Manual Data Entry Step 2 - Enter Enrollment and Academic Information

Entering enrollment and academic information is the second step of creating or editing a student record using Manual Data Entry.

Note: You cannot access the Enrollment/Academic Information page until you have entered all required fields (marked with an asterisk *) on the **Student and School Information** page. You cannot access any of the subsequent Manual Data Entry steps until you have entered at least the student's **Grade Level** on the **Enrollment/Academic Information** page.

» To enter Enrollment and Academic information using Manual Data Entry

step 1 Open the **Enrollment/Academic Information** page:

- If you have just started creating a new record, click **Next>>** from the **Student and School Information** page.

- If you are resuming data entry on a record that you started or edited, and then saved for later, find the record on your **Manage Records** page and click **Create** or **Re-edit** in the **Modify** column of that record's listing, then click the **Enrollment/Academic Information** tab.

The **Enrollment / Academic Information** (p. 106) page opens.

step 2 Enter the relevant information about the student's enrollment.

step 3 Click **Save**.

The information that you have entered so far is saved.

step 4 Leave the **Enrollment/Academic Information** data entry tab:

- To continue the manual data entry process, click **Next>>**.

  Step 3 - **Current Coursework** starts.

- To leave additional steps for a later time, click **Cancel**.

  You are returned to the **Manage Records** page.

Manual Data Entry Step 3 - Enter Current Coursework

» To Enter Current Coursework using Manual Data Entry

step 1 Open the **Current Coursework** page:

- If you have just started creating a new record, click **Next>>** from the **Enrollment/Academic Information** page.

- If you are resuming data entry on a record that you started or edited, and then saved for later, find the record on your **Manage Records** page and click

Create or **Re-edit** in the **Modify** column of that record's listing, then click the **Current Coursework** tab.

The **Current Coursework** (p. 107) page opens.

step 2 At the top of the page, enter information about the current academic session.

step 3 Add individual courses to the list of current coursework:

3a Inside the **Courses** area, click **Add** to enter information about individual courses.

The **Add Course** page opens.

3b Enter course information, including whether credit has been awarded, and any special explanations about the type of course such as Honors, Advanced Placement, Physical Education Equivalent, or other designators for a course that is outside the standard curriculum for that grade level.

3c Click **Add** to save the course information.

You are returned to the **Current Coursework** page.

3d Repeat steps 3a through 3c for each course that you wish to add.

step 4 When you are done entering courses in the **Courses** area, click **Add** at the bottom of the **Current Coursework** page.

The courses listed in the **Courses** area are added to the student record in progress.

step 5 Click **Save**.

The information that you have entered so far is saved.

step 6 Leave the **Current Coursework** data entry tab:

- To continue the manual data entry process, click **Next>>**.

  Step 4 - **Completed Coursework** starts.

- To leave additional steps for a later time, click **Cancel**.

  You are returned to the **Manage Records** page.

Manual Data Entry Step 4 - Enter Completed Coursework

» To Enter Completed Coursework using Manual Data Entry

step 1 Open the **Completed Coursework** page:

- If you have just started creating a new record, click **Next>>** from the **Current Coursework** page.
- If you are resuming data entry on a record that you started or edited, and then saved for later, find the record on your **Manage Records** page and click **Create** or **Re-edit** in the **Modify** column of that record's listing, then click the **Completed Coursework** tab.

The *Completed Coursework* (p. 108) page opens.

step 2 At the top of the page, enter information about the completed academic session.

step 3 Add individual courses to the list of completed coursework:

3a Inside the **Courses** area, click **Add** to enter information about individual courses.

The **Add Course** page opens.

3b Enter course information, including whether credit has been awarded, and any special explanations about the type of course such as Honors, Advanced Placement, Physical Education Equivalent, or other designators for a course that is outside the standard curriculum for that grade level.

3c Click **Add** to save the course information.

You are returned to the **Completed Coursework** page.

3d Repeat steps 3a through 3c for each course that you wish to add.

step 4 When you are done entering courses in the **Courses** area, click **Add** at the bottom of the **Completed Coursework** page.

The courses listed in the **Courses** area are added to the student record in progress.

step 5 Click **Save**.

The information that you have entered so far is saved.

step 6 Leave the **Completed Coursework** data entry tab:

- To continue the manual data entry process, click **Next>>**.

  Step 5 - **Add Assessments** starts.

- To leave additional steps for a later time, click **Cancel**.

  You are returned to the **Manage Records** page.

Manual Data Entry Step 5 - Enter Assessments

» To Enter Assessments using Manual Data Entry

step 1 Open the **Enter Assessments** page:

- If you have just started creating a new record, click **Next>>** from the **Completed Coursework** page.
- If you are resuming data entry on a record that you started or edited, and then saved for later, find the record on your **Manage Records** page and click **Create** or **Re-edit** in the **Modify** column of that record's listing, then click the **Enrollment/Academic Information** tab.

The *Assessments* (p. 109) page opens.

step 2 Add individual assessments to the list of assessments:

2a Inside the **Assessments** area, click **Add**.

The **Add Assessment** page opens.

2b Enter the assessment information.

Note: The **Test Name** field offers both a drop-down list and a text entry box.

Use only one of these to specify the assessment name.

2c If there are any sub tests, add them by clicking **Add Sub Test**.

2d At the bottom of the **Add Assessment** page, click **Add**.
The assessment is added to the list of assessments on the **Assessments** page.

2e Repeat steps 2a through 2c for each assessment you wish to enter.

step 3 When you are done entering assessments, click **Save**.
The information that you have entered so far is saved.

step 4 Leave the **Enter Assessments** data entry tab:

- To continue the manual data entry process, click **Next>>**.
  Step 6 - **Validate Manually Entered Data** starts.
- To leave additional steps for a later time, click **Cancel**.
  You are returned to the **Manage Records** page.

Manual Data Entry Step 6 - Validate Manually Entered Data

The sixth step of the manual data entry process is a review of the data you have entered before you submit it for validation. The data is divided into five groups that correspond to the first five steps of the manual data entry process. To correct any information, click the appropriate tab for that information. For example, if you find that you have omitted a course that the student completed, click **4.Completed Coursework**.

» To Validate Manually Entered Data

step 1 Open the **Validate** page:

- If you have just started creating a new record, click **Next>>** from the **Assessments** page.
- If you are resuming data entry on a record that you started or edited, and then saved for later, find the record on your **Manage Records** page and click **Create** or **Re-edit** in the **Modify** column of that record's listing, then click the **Validate** tab.

The **Validate** (p. 111) page opens.

step 2 Review the data that you have entered in the previous five steps.

step 3 If necessary, correct data that was not entered correctly by visiting the appropriate tab of the Manual Data Entry interface.

step 4 Once you have ensured that the data is correct, click **Save**.

step 5 Click **Validate**.
The **Validation Results** (p. 115) page opens.

Note: A student record/transcript cannot be created or updated until all Errors are resolved. A record/transcript can be created or updated if validation produces only Warnings.

step 6 If data validation produced Errors:

6a Review the error messages to determine which data elements need to be corrected.

6b Correct the data elements using the appropriate steps of the Manual Data Entry Process.

Tip: If you cannot remember the appropriate MDE step for a particular data element, use the **Validation** page to find it. Data elements on the **Validation** page are grouped by the step in which they are entered.

6c Return to the **Validation** page by clicking the Validation tab.

6d Click **Save** to save your changes.

6e Repeat Steps 5 and 6 until validation produces no Errors.

step 7 Leave the **Validate Manually Entered Data** tab:

- To finalize creation of the student record/transcript, **Next>>**.

  The student record/transcript is created.

- To leave additional steps for a later time, click **Cancel.**

You are returned to the **Manage Records** page.

Manual Data Entry Step 7 - Confirm and Create Student Record

Manual Data Entry Step 6 - Data validation - produces Warnings and Errors. Warnings indicate that there may be some data missing, but that the record is essentially complete. Errors indicate that there is required data that is missing, or that there is conflict between data elements within the record/transcript.

Once you have resolved all Errors, you can finalize creation of the student record/transcript.

» To Confirm and Create (or Update) a Student Record

step 1 *Validate the data that you have entered* (p. 48).

step 2 From the **Confirm and Create** tab, click **Create** (or **Update** if editing an existing record).

The student record/transcript is created (or updated) and you are returned to the **Manage Records** page.

Add an attachment to a student record/transcript

You can add one or more attachments to student records/transcripts that you have uploaded to the TREx. Attachments are uploaded, stored, and transmitted in their original file formats.

» To add an attachment to a student record/transcript

step 1 Log in to the Texas Records Exchange system (TREx).

step 2 Click **Manage records**.

The **Manage Records for [your institution or partner name]** (p. 103) page opens, showing a list of student records.

step 3 Locate the student record/transcript to which you want to add an attachment and click the **Add attachment** or **[X] Attachments** link.

The **Upload attachment for [student name]** (p. 103) page opens.

step 4 Click **Browse...** to browse to and select the file that you want to attach.

step 5 Click **Upload**.

The file is uploaded. A progress bar shows status of the transfer. You are returned to the Manage records page when the transfer is complete.

Remove records from the TREx

Records that you leave on the TREx server will be purged after ten days. If you know you are finished using a record, you can delete it before this ten day period has elapsed.

Note: After you are notified that a record/transcript has been sent, you can remove it from the TREx - you don't need to wait for the record to be accepted.

» To remove records from the TREx

step 1 Log in to the Texas Records Exchange system (TREx).

step 2 Click **Manage records**.

The **Manage Records for [your institution]** (p. 103) page opens.

step 3 Check the box next to each student record you want to remove.

Tip: If you have so many items in the list that it is hard to find what you are looking for, use the *search fields* (p. xiii) to find a specific record/transcript or to narrow down the list.

step 4 Click **Delete**.

You are asked to confirm the deletion.

step 5 Click **OK**.

The records you selected are deleted from the database and the **Manage Records** page is updated.

step 6 When you are done deleting records, click **Done** to return to the TREx home page.

Download a record/transcript from the TREx

You can download one or more student records from the **Manage Records** page. Downloaded records are in XML format and are named according to the student's name and ID number. For example, the download file of a record for a student with a first name of "First", a middle name of "Student", a last name of "One", and a student ID of "000990001" would be named:

```
FIRST_STUDENT_ONE_000990001
```

» To download records from the TREx

step 1 Log in to the Texas Records Exchange system (TREx).

step 2 Click **Manage records**.

The **Manage Records for [your institution]** (p. 103) page opens.

step 3 Click **Download** next to the student record you want to download.

Tip: If you have so many items in the list that it is hard to find what you are looking for, use the *search fields* (p. xiii) to find a specific record/transcript or to narrow down the list.

step 4 Click **Download**.

Your browser's download dialog starts.

Note: The exact flow of the download dialog depends on the browser you are using.

step 5 Confirm that you want to download the record file.

step 6 Specify the download location for the student record.

The file is downloaded to the location you specified.

Reporting

Depending on the type of account that you have, you can view one or more reports from your TREx **Home** page.

The TREx offers a few different types of reports:

- Performance reports tell to whom and from whom requests and records are most frequently sent and received.
- Activity reports tell about the numbers and outcomes of different types of transactions.
- Transaction status report lists transactions by their current state.

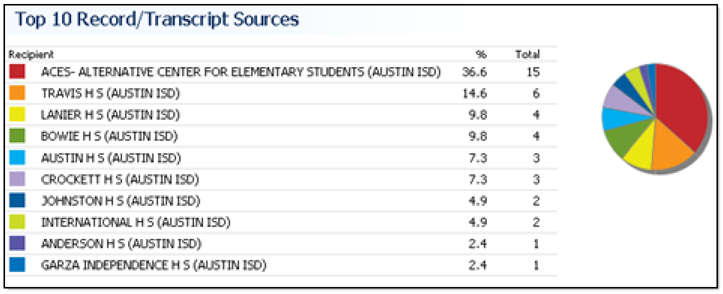
Workflows

Top Ten Reports (p. 53)
Institution Activity Summary (p. 55)
District Activity Summary (p. 56)
Transaction Status (p. 59)

Top Ten Reports

The Top 10 reports give you a quick snapshot of the institutions with which you are exchanging the most records and requests.

Top 10 record/transcript sources



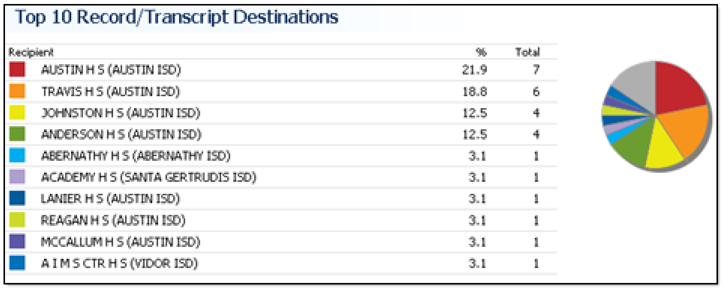
Top 10 Record/Transcript Sources

	Recipient	%	Total
🟥	ACES- ALTERNATIVE CENTER FOR ELEMENTARY STUDENTS (AUSTIN ISD)	36.6	15
🟧	TRAVIS H S (AUSTIN ISD)	14.6	6
🟨	LANIER H S (AUSTIN ISD)	9.8	4
🟩	BOWIE H S (AUSTIN ISD)	9.8	4
🟦	AUSTIN H S (AUSTIN ISD)	7.3	3
🟪	CROCKETT H S (AUSTIN ISD)	7.3	3
🟦	JOHNSTON H S (AUSTIN ISD)	4.9	2
🟨	INTERNATIONAL H S (AUSTIN ISD)	4.9	2
🟪	ANDERSON H S (AUSTIN ISD)	2.4	1
🟦	GARZA INDEPENDENCE H S (AUSTIN ISD)	2.4	1

Figure 20: The Top 10 Record/Transcript Sources report.

The **Top 10 record/transcript sources** report shows the ten institutions that have sent the most records/transcripts to your institution.

Top 10 record/transcript destinations



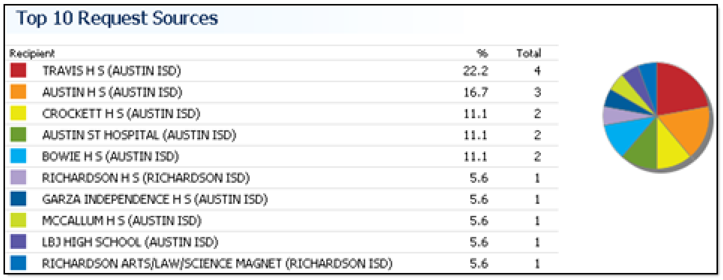
Top 10 Record/Transcript Destinations

	Recipient	%	Total
🟥	AUSTIN H S (AUSTIN ISD)	21.9	7
🟧	TRAVIS H S (AUSTIN ISD)	18.8	6
🟨	JOHNSTON H S (AUSTIN ISD)	12.5	4
🟩	ANDERSON H S (AUSTIN ISD)	12.5	4
🟦	ABERNATHY H S (ABERNATHY ISD)	3.1	1
🟪	ACADEMY H S (SANTA GERTRUDIS ISD)	3.1	1
🟦	LANIER H S (AUSTIN ISD)	3.1	1
🟨	REAGAN H S (AUSTIN ISD)	3.1	1
🟪	MCCALLUM H S (AUSTIN ISD)	3.1	1
🟦	A I M S CTR H S (VIDOR ISD)	3.1	1

Figure 21: The Top 10 Record/Transcript Destinations report.

The **Top 10 record/transcript destinations** report shows the ten institutions to which you have sent the most records/transcripts.

Top 10 request sources



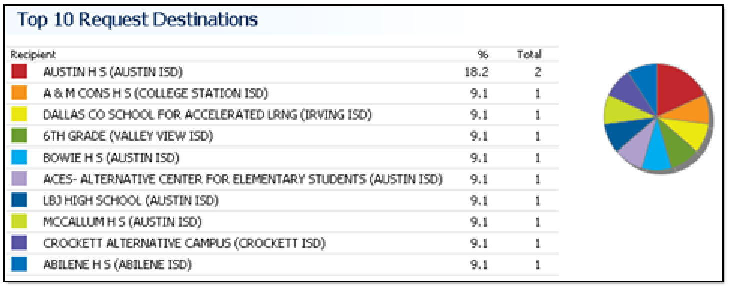
Top 10 Request Sources

	Recipient	%	Total
🟥	TRAVIS H S (AUSTIN ISD)	22.2	4
🟧	AUSTIN H S (AUSTIN ISD)	16.7	3
🟨	CROCKETT H S (AUSTIN ISD)	11.1	2
🟩	AUSTIN ST HOSPITAL (AUSTIN ISD)	11.1	2
🟦	BOWIE H S (AUSTIN ISD)	11.1	2
🟪	RICHARDSON H S (RICHARDSON ISD)	5.6	1
🟦	GARZA INDEPENDENCE H S (AUSTIN ISD)	5.6	1
🟨	MCCALLUM H S (AUSTIN ISD)	5.6	1
🟪	LBJ HIGH SCHOOL (AUSTIN ISD)	5.6	1
🟦	RICHARDSON ARTS/LAW/SCIENCE MAGNET (RICHARDSON ISD)	5.6	1

Figure 22: The Top 10 Request Sources report.

The **Top 10 request sources** report shows the ten institutions that have requested the most records/transcripts from your institution.

Top 10 request destinations



Top 10 Request Destinations

	Recipient	%	Total
🟥	AUSTIN H S (AUSTIN ISD)	18.2	2
🟧	A & M CONS H S (COLLEGE STATION ISD)	9.1	1
🟨	DALLAS CO SCHOOL FOR ACCELERATED LRNG (IRVING ISD)	9.1	1
🟩	6TH GRADE (VALLEY VIEW ISD)	9.1	1
🟦	BOWIE H S (AUSTIN ISD)	9.1	1
🟪	ACES- ALTERNATIVE CENTER FOR ELEMENTARY STUDENTS (AUSTIN ISD)	9.1	1
🟦	LBJ HIGH SCHOOL (AUSTIN ISD)	9.1	1
🟨	MCCALLUM H S (AUSTIN ISD)	9.1	1
🟪	CROCKETT ALTERNATIVE CAMPUS (CROCKETT ISD)	9.1	1
🟦	ABILENE H S (ABILENE ISD)	9.1	1

Figure 23: The Top 10 Request Destinations report.

The **Top 10 request destinations** report shows the ten institutions from which you have requested the most records.

Reporting - Campus Activity Summary

The **Campus Activity Summary** provides you with a summary of the transactions conducted by TREx users from your campus.

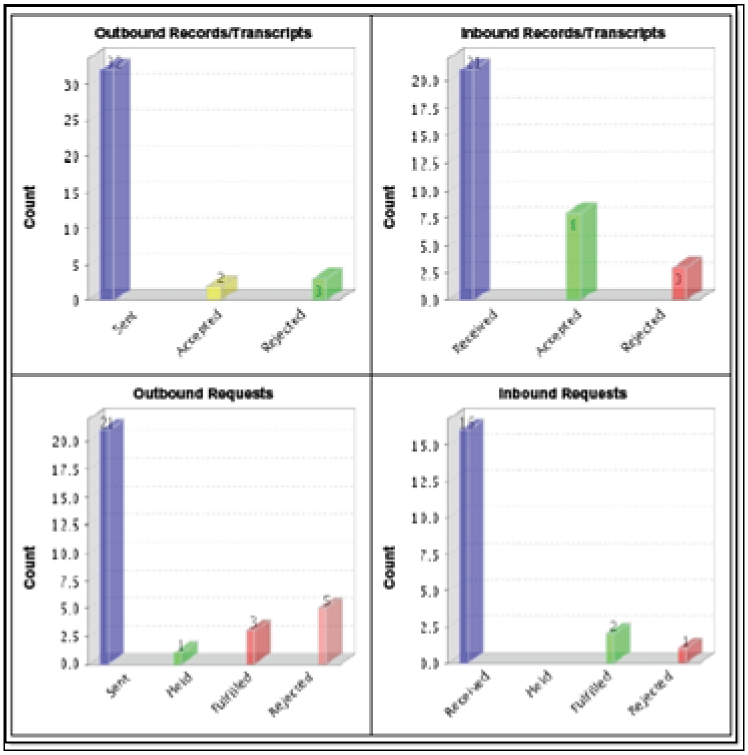
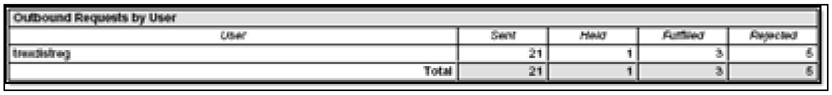


Figure 24: The Institution Activity Summary provides graphs of totals for different transaction types and their outcomes.

The report features graphs of campus totals, and tables of user totals for outbound records/transcripts, inbound records/transcripts, outbound requests, and inbound requests.



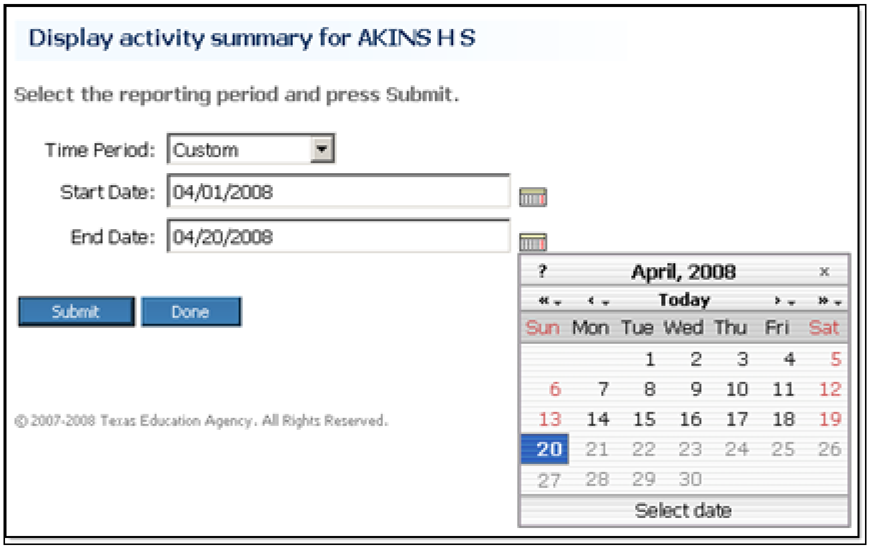
Outbound Requests by User

User	Sent	Held	Fulfilled	Rejected
trexdistreg	21	1	3	5
Total	21	1	3	5

Figure 25: The Institution Activity Summary provides tables of totals for different transaction types and their outcomes by user.

Running the report

You can run this report from the **Reporting** section of your **Home** page. The report interface provides several pre-defined report time periods (Today, Yesterday, Week to date, and so on) from which you can choose when running the report. You can also define your own time period for the report by selecting **Custom** from the **Time Period** list. This activates the **Start Date** and **End Date** fields which you can fill in by typing in dates or by using the calendar control next to each date field.



Display activity summary for AKINS H S

Select the reporting period and press Submit.

Time Period: Custom

Start Date: 04/01/2008

End Date: 04/20/2008

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Submit
Done
?
April, 2008
×
«
‹
Today
›
»
Sun Mon Tue Wed Thu Fri Sat
1 2 3 4 5
6 7 8 9 10 11 12
13 14 15 16 17 18 19
20 21 22 23 24 25 26
27 28 29 30
Select date

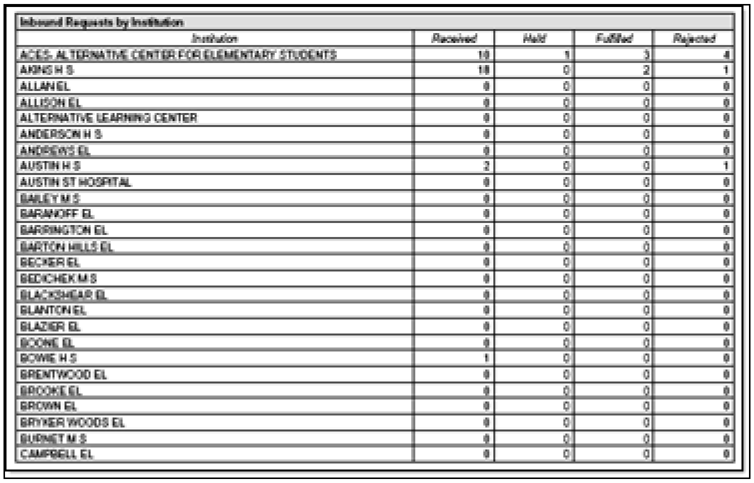
Figure 26: Choose a pre-defined time period from the list or choose Custom to define your own time period.

Reporting - District Activity Summary

The **District Activity Summary** provides you with a summary of the TREx transactions conducted by members of a particular district.

If you are a District level user, the report covers campuses in your district.

If you are multi-district level user, such as an ESC user, the report covers campuses in the the same district as the campus that is currently selected.

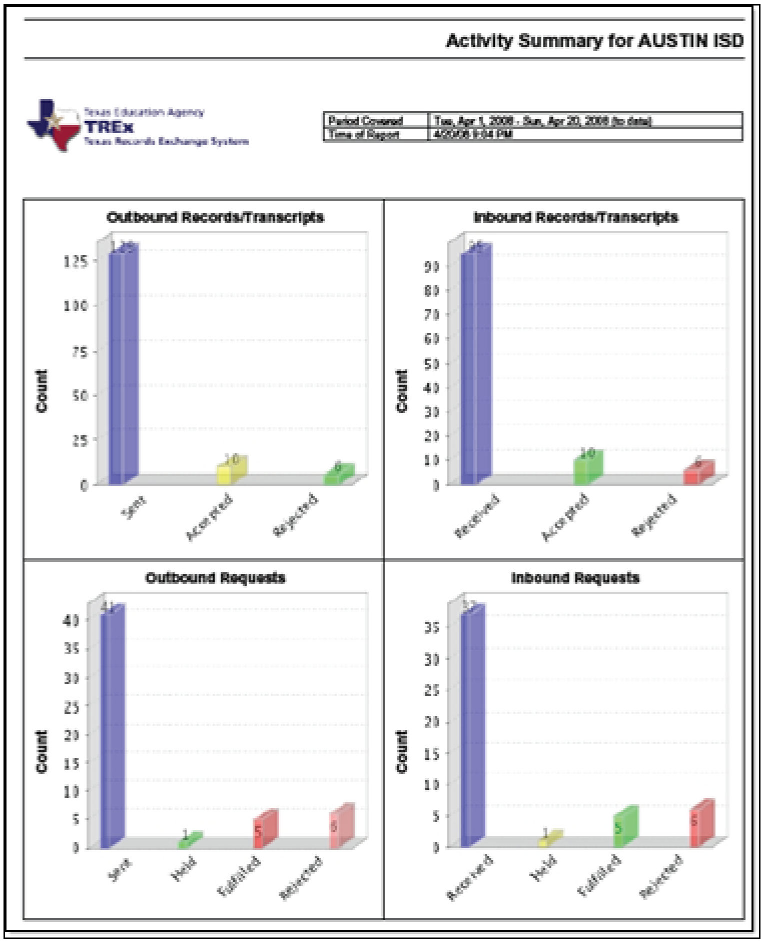


Inbound Requests by Institution

Institution	Received	Held	Fulfilled	Rejected
ACES- ALTERNATIVE CENTER FOR ELEMENTARY STUDENTS	10	1	3	4
AKINS H S	18	0	2	1
ALLAN EL	0	0	0	0
ALLISON EL	0	0	0	0
ALTERNATIVE LEARNING CENTER	0	0	0	0
ANDERSON H S	0	0	0	0
ANDREWS EL	0	0	0	0
AUSTIN H S	2	0	0	1
AUSTIN ST HOSPITAL	0	0	0	0
BAILEY M S	0	0	0	0
BARANOFF EL	0	0	0	0
BARRINGTON EL	0	0	0	0
BARTON HILLS EL	0	0	0	0
BECKER EL	0	0	0	0
BEDICHEK M S	0	0	0	0
BLACKSHEAR EL	0	0	0	0
BLANTON EL	0	0	0	0
BLAZIER EL	0	0	0	0
BOONE EL	0	0	0	0
BOWIE H S	1	0	0	0
BRENTWOOD EL	0	0	0	0
BROOKE EL	0	0	0	0
BROWN EL	0	0	0	0
BRYKER WOODS EL	0	0	0	0
BURNET M S	0	0	0	0
CAMPBELL EL	0	0	0	0

Figure 27: The District Activity Summary provides graphs of district totals for different transaction types and their outcomes.

The report features graphs of partner totals, and tables of institution totals for inbound records/transcripts, outbound records/transcripts, inbound requests, and outbound requests.



Activity Summary for AUSTIN ISD

Period Covered	Tue, Apr 1, 2008 - Sun, Apr 20, 2008 (to date)
Time of Report	4/20/08 9:04 PM

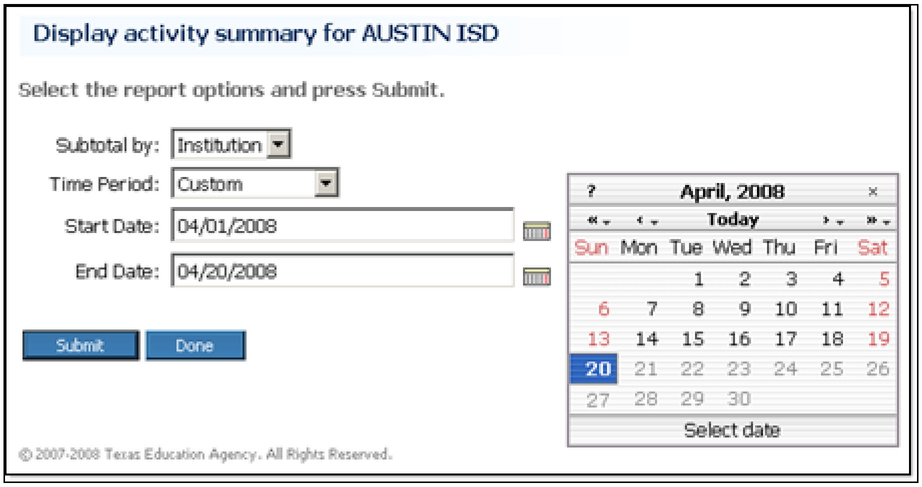
Texas Education Agency
TREx
Texas Records Exchange System
Outbound Records/Transcripts
Count
125
100
75
50
25
0
10
6
Sent
Accepted
Rejected
Inbound Records/Transcripts
Count
90
80
70
60
50
40
30
20
10
0
10
6
Received
Accepted
Rejected
Outbound Requests
Count
40
35
30
25
20
15
10
5
0
41
1
5
Sent
Held
Fulfilled
Rejected
Inbound Requests
Count
35
30
25
20
15
10
5
0
1
5
6
Received
Held
Fulfilled
Rejected

Figure 28: Transaction types and their outcomes are shown in a tabular format.

Running the report

You can run this report from the **Reporting** section of your **Home** page.

The report interface provides several pre-defined report time periods (Today, Yesterday, Week to date, and so on) from which you can choose when running the report. You can also define your own time period for the report by selecting **Custom** from the **Time Period** list. This activates the **Start Date** and **End Date** fields which you can fill in by typing in dates or by using the calendar control next to each date field.



Display activity summary for AUSTIN ISD

Select the report options and press Submit.

Subtotal by: Institution

Time Period: Custom

Start Date: 04/01/2008

End Date: 04/20/2008

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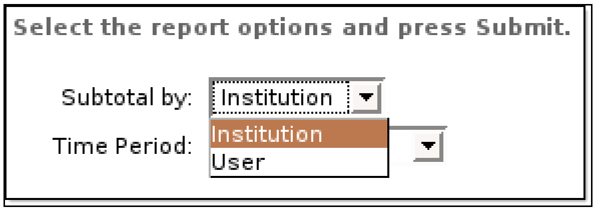
In addition, you can choose to total transactions by individual users or by institutions.

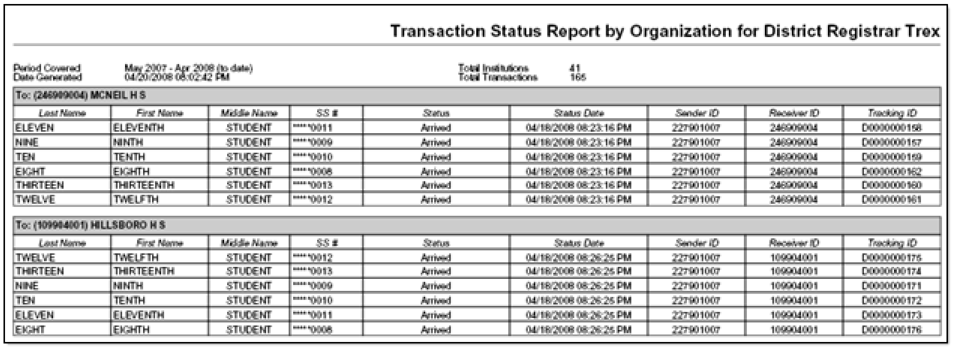


Select the report options and press Submit.

Subtotal by: Institution

Reporting - Transaction Status

The **Transaction Status** report provides a listing of all chosen transactions, sorted by transaction type and status, and for multi-campus reports, by campus.



Transaction Status Report by Organization for District Registrar Trex

Period Covered May 2007 - Apr 2008 (to date)
Date Generated 04/20/2008 08:02:42 PM

Total Institutions 41
Total Transactions 165

To: (246909004) MCNEIL H S

Last Name	First Name	Middle Name	SS #	Status	Status Date	Sender ID	Receiver ID	Tracking ID
ELEVEN	ELEVENTH	STUDENT	*****0011	Arrived	04/18/2008 08:23:16 PM	227901007	246909004	D000000158
NINE	NINTH	STUDENT	*****0009	Arrived	04/18/2008 08:23:16 PM	227901007	246909004	D000000157
TEN	TENTH	STUDENT	*****0010	Arrived	04/18/2008 08:23:16 PM	227901007	246909004	D000000159
EIGHT	EIGHTH	STUDENT	*****0008	Arrived	04/18/2008 08:23:16 PM	227901007	246909004	D000000162
THIRTEEN	THIRTEENTH	STUDENT	*****0013	Arrived	04/18/2008 08:23:16 PM	227901007	246909004	D000000160
TWELVE	TWELFTH	STUDENT	*****0012	Arrived	04/18/2008 08:23:16 PM	227901007	246909004	D000000161

To: (109904001) HILLSBORO H S

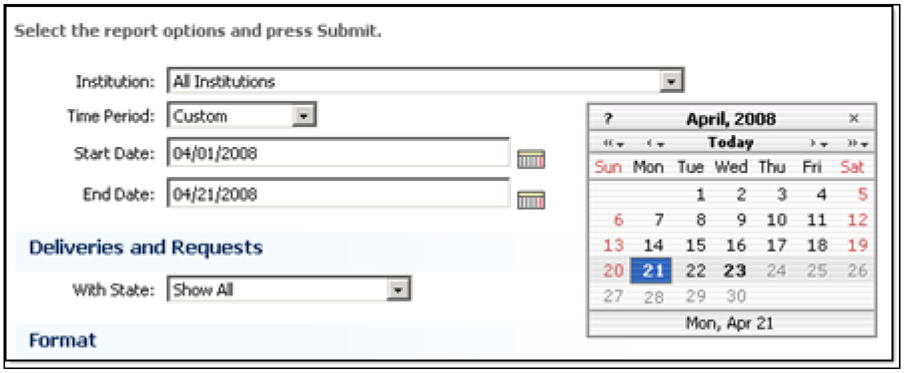
Last Name	First Name	Middle Name	SS #	Status	Status Date	Sender ID	Receiver ID	Tracking ID
TWELVE	TWELFTH	STUDENT	*****0012	Arrived	04/18/2008 08:26:25 PM	227901007	109904001	D000000175
THIRTEEN	THIRTEENTH	STUDENT	*****0013	Arrived	04/18/2008 08:26:25 PM	227901007	109904001	D000000174
NINE	NINTH	STUDENT	*****0009	Arrived	04/18/2008 08:26:25 PM	227901007	109904001	D000000171
TEN	TENTH	STUDENT	*****0010	Arrived	04/18/2008 08:26:25 PM	227901007	109904001	D000000172
ELEVEN	ELEVENTH	STUDENT	*****0011	Arrived	04/18/2008 08:26:25 PM	227901007	109904001	D000000173
EIGHT	EIGHTH	STUDENT	*****0008	Arrived	04/18/2008 08:26:25 PM	227901007	109904001	D000000176

Figure 29: The Transaction Status report lists transactions sorted by transaction type, transaction status, and when applicable, by campus.

Running the report

You can run this report from the **Reporting** section of your **Home** page.

The report interface provides several pre-defined report time periods (Today, Yesterday, Week to date, and so on) from which you can choose when running the report. You can also define your own time period for the report by selecting **Custom** from the **Time Period** list. This activates the **Start Date** and **End Date** fields which you can fill in by typing in dates or by using the calendar control next to each date field.



Select the report options and press Submit.

Institution: All Institutions

Time Period: Custom

Start Date: 04/01/2008

End Date: 04/21/2008

Deliveries and Requests

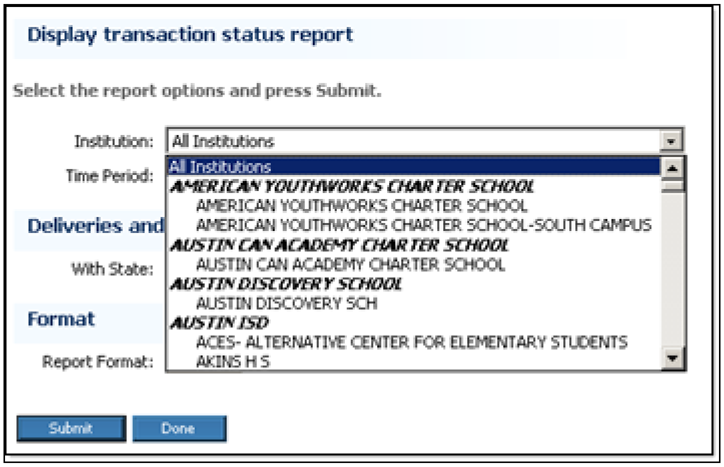
With State: Show All

Format

?
April, 2008
×
Today
Sun Mon Tue Wed Thu Fri Sat
1 2 3 4 5
6 7 8 9 10 11 12
13 14 15 16 17 18 19
20 21 22 23 24 25 26
27 28 29 30
Mon, Apr 21

Figure 30: The calendar control enables you to enter report start and end dates.

Multi-campus users can chose to run the report either for all affiliated campuses or for a particular affiliated campus.



Display transaction status report

Select the report options and press Submit.

Institution: All Institutions

Time Period:

Deliveries and

With State:

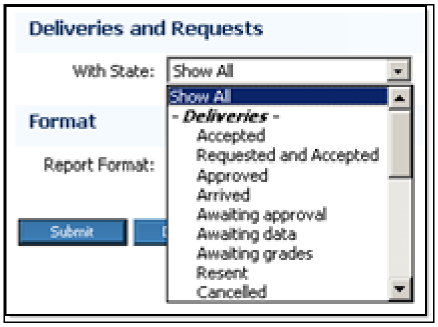
Format

Report Format:

All Institutions
AMERICAN YOUTHWORKS CHARTER SCHOOL
AMERICAN YOUTHWORKS CHARTER SCHOOL
AMERICAN YOUTHWORKS CHARTER SCHOOL-SOUTH CAMPUS
AUSTIN CAN ACADEMY CHARTER SCHOOL
AUSTIN CAN ACADEMY CHARTER SCHOOL
AUSTIN DISCOVERY SCHOOL
AUSTIN DISCOVERY SCH
AUSTIN ISD
ACES- ALTERNATIVE CENTER FOR ELEMENTARY STUDENTS
AKINS H S
Submit
Done

Figure 31: Multi-campus users can run the report for one or all of their affiliated campuses.

The report can be run for all transactions of all statuses or for transactions of a specified status such as **cancelled requests**.



Deliveries and Requests

With State: Show All

Format

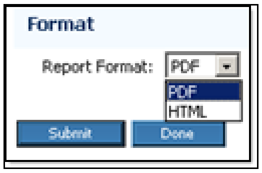
Report Format:

Show All
- Deliveries -
Accepted
Requested and Accepted
Approved
Arrived
Awaiting approval
Awaiting data
Awaiting grades
Resent
Cancelled
Submit

Figure 32: You can choose a particular transaction status for the report or you can show all statuses.

The report can be shown in either PDF or HTML format.

Tip: If you want to print the report, choose the PDF format.


Format
PDF
HTML
Submit
Done

Report Format: PDF

Figure 33: You can choose either HTML or PDF format for the report.

Manage Legends

Your institution can define an explanatory legend to be attached to all records/transcripts that you send to other institutions using the TREx.

Workflows

View transcript legend (p. 64)

Remove record/transcript legend (p. 63)

Upload record/transcript legend (p. 63)

Remove Transcript Legend

If you upload a record/transcript legend to the TREx, each record/transcript sent on your institution's behalf will include that legend. If you no longer want to send a legend with each record/transcript, you must remove the legend from the TREx.

If a transcript legend has been uploaded, you can view it from your **Home** page. If no legend has been uploaded, or the legend has been removed, the **Remove record/transcript legend** link will not be shown.

» To remove a record/transcript legend

step 1 Log in to the TREx

Your **Home** page opens.

step 2 Click **Remove record/transcript legend**.

You are asked to confirm that you want to remove the legend.

step 3 Click **Remove**.

The legend file is removed from the TREx and you are returned to the **Home** page.

Upload Transcript Legend

You can upload a transcript legend that explains your institution's grading system. The TREx attaches this legend to each record/transcript sent from the institution on whose behalf the legend was uploaded.

Note: Transcript legends are not attached to records/transcripts sent to Texas post-secondary institutions (or other institutions using the SPEEDE server).

A transcript legend file must be an Adobe Acrobat (pdf) file and can be no larger than 17MB.

Note: You can only have one transcript legend per institution. If your institution has already uploaded a transcript legend, the existing legend will be replaced when you upload a new legend.

» To upload a record/transcript legend

step 1 Create a PDF file containing your transcript legend.

step 2 Log in to the TREx.

Your **Home** (p. 19) page opens.

step 3 Click **Upload record/transcript legend**.

The **Upload New Transcript Legend for [your institution]** page opens.

step 4 Click **Browse** to locate and select the record/transcript legend file.

step 5 Click **Upload** to begin the file transfer.

The progress bar shows the upload progress. When the file transfer is complete you are returned to the **Home** page.

View transcript legend

If a transcript legend has been uploaded, you can view it from your **Home** page. If no legend has been uploaded, or the legend has been removed, the **View record/transcript legend** link will not be shown.

» To view a record/transcript legend

step 1 Log in to the TREx.

Your **Home** (p. 19) page opens.

step 2 In the **Administration** (p. 23) section, click **View record/transcript legend**.

The current transcript legend is shown in a new window.

Glossary of Terms

A

Accept a record/transcript

To accept a record/transcript means that you acknowledge delivery of the record/transcript and it is moved to your data store on the TREx. From there you can view the record/transcript in PDF format or download the transcript in electronic data format.

Accepted

A delivery status indicating that student data files were accepted by the recipient.

Accepted from request

A delivery status indicating that the requested student data files have been received and accepted by the requesting institution.

Arrived

A delivery status indicating that the student data files have arrived at the recipient institution.

Awaiting Delivery

A request status indicating that the request is waiting for student data to be delivered from the record holding institution.

Awaiting Fulfillment

A request status indicating that the request has been place din the recipient's queue.

Awaiting Grades

A request or delivery status indicating that the sending institution is holding the transaction until grades are posted.

Awaiting Resend

Delivery status indicating that the delivery will be sent again.

C

Canceled

A request or delivery status indicating that the institution which initiated the transaction has chosen to cancel it.

Co-academic

Non-academic institutions that require official academic records such as certification authorities, licensing boards, and others.

Completed

A request or delivery status indicating that the student data files have been accepted by the requesting or receiving institution.

D

Data Translation

Data translation is the process of extracting data from one format and converting it to another format. When you import a file into your word processor or spreadsheet, the import utility is performing data translation. Many programs store data in a proprietary format. Data translation software must be programmed for each proprietary format.

Delivering

A request status indicating that the student data files are being delivered to the requesting institution.

Delivery

A student's record/transcript that is sent to another institution. A delivery can be initiated by an institution, or it can be a response to a request.

E

EDI

Electronic Data Interchange (EDI) is a standard that defines how electronic information should be structured so that it can be exchanged between differing systems. EDI is implemented using other standards, such as ASC X12.

F

FERPA

The Family Educational Rights and Privacy Act (FERPA) defines who can and cannot have access to student records, and under what circumstances these rules apply.

For more information about FERPA, see:

`http://www.ed.gov/policy/gen/guid/fpco/ferpa/index.html`

Fulfilled

A request status indicating that the student data files have been delivered to the requesting institution.

I

Inbound

Inbound transactions are requests or records/transcripts that someone else has sent to you. Inbound requests are always initiated by a different institution. Inbound records are records that have been sent to you with or without a request from you.

L

Legend

A transcript legend is an explanation of the way your institution presents academic information in its transcripts to help other institutions interpret them. Once you have uploaded a transcript legend, it is included with each transcript that you send using the TREx until the legend is removed.

O

Outbound

Outbound requests or records/transcripts are transactions that you are sending to another institution. Outbound requests are always initiated by you. Outbound record/transcript deliveries may be initiated by you or they may be in response to another institution's request.

P

Processing

A delivery or request status indicating that the transaction is being processed.

R

Ready to Process

A delivery status indicating that the student data has been uploaded and the delivery is ready to process.

Reject a request or record/transcript

Transactions that come from other institutions, such as requests and records/transcripts can be rejected by the recipient. There are several reasons why an institution might reject a transaction including:

- The recipient requires more information from the initiator before it can proceed
- The transmission was made to the wrong institution
- The transmission is a duplicate transmission

Note: If a recipient institution cannot fulfill a request until an internal condition is fulfilled, such as posting of grades, the request should be placed on hold, not rejected.

Rejected requests and records can be sent again without having to re-enter the transaction information.

Rejected

A request or delivery status indicating that the transaction was not accepted by one of the parties to the transaction. For example, a request that was rejected by the record holder or a delivery that was rejected by the recipient.

Request

Request is shorthand for a request for records/transcripts. A request must include the student's first name, last name, and date of birth for identification purposes.

Tracking number

A unique number assigned to each transaction by the TREx. If you send one transcript to multiple recipients each copy receives its own tracking number.

Transferred

A delivery status indicating that the recipient institution was changed.

Type (Institution Type)

Institution type indicates the purpose and clientele of an institution. TREx institution types include:

- Co-academic - Non-academic institutions that require official academic records such as certification authorities, licensing boards, and others.
- Pre-K through 12 - Academic institutions whose students are in the preschool through high school grade range.
- Post-secondary - Academic institutions whose entry requirements include at least a high school diploma.

Undelivered

A request or delivery status indicating that communications with the recipient institution could not be established.

Workflow

A workflow is a sequence of activities that you complete to accomplish a goal. Also known as a task or a procedure, a workflow may be a part of a larger task or it may contain one or more smaller workflows.

The rules governing a workflow, such as when and if it must be performed in relation to other workflows, vary. For example, when you manage inbound requests, you can choose to reject, fulfill, or hold requests, and can do so in any order you choose. However, when you fulfill a request, you must either have or put the student record/transcript into the TREx database before you can send it to the requesting institution.

Configuring Your Browser for TREx Use

Turn on JavaScript and cookies in Internet Explorer

Note: Check your browser's help for the most current information on configuration options.

» To turn on JavaScript and cookies in Internet Explorer

step 1 Start Internet Explorer

step 2 Select **Tools >> Internet Options** from the Internet Explorer menu.
The Internet Options window opens.

step 3 Turn on JavaScript:

- 3a Click the **Security** tab.
- 3b Click the **Trusted sites** icon.
- 3c Click **Sites.**...
  The **Trusted sites** window opens.
- 3d Type the TEAL url https://pryor.tea.state.tx.us/, in the **Add this Web site to the zone:** text box and click **Add**.
  The TREx domain name is moved to the **Web sites:** list.
- 3e Click **OK**.
  The **Trusted sites** window closes.

step 4 Turn on cookies:

- 4a Click the **Privacy** tab.
- 4b Click **Sites...**.
  The **Per Site Privacy Actions** window opens.
- 4c Type the TEAL URL in the **Address of Website** text box and click **Allow**.
  The TEAL domain name is moved to the **Managed Web sites** list. It should say Always Allow in the **Setting** column.
- 4d Click **OK**.
  The **Per Site Privacy Actions** window closes.

step 5 Click **OK** to close the **Internet Options** window.

Turn on JavaScript and cookies in Firefox (Windows)

Note: Check your browser's help for the most current information on configuration options.

» To turn on JavaScript and cookies in Firefox

step 1 Start Firefox.

step 2 Select **Tools >> Options** on the Firefox menu.
The **Options** window opens.

step 3 Turn on JavaScript:

3a Click **Content** at the top of the window.
The content handling options are displayed.

3b Make sure **Enable JavaScript** is checked.

Note: For better display of online help and the user interface, allow the TREx website to display popups and to load images.

step 4 Turn on cookies:

4a Click **Privacy** at the top of the window.
The **Privacy** tabs are displayed.

4b Click the **Cookies** tab.
The **Cookies** options are displayed.

4c Click **Exceptions** (beside the **Allow sites to set Cookies** check box).
The **Exceptions - Cookies** window opens.

4d Type the TEAL url, https://pryor.tea.state.tx.us/ in the **Address of web site:** text box and click **Allow**.
The url is moved to the list of website exceptions. The status column should say **Allow**.

4e Click **Close** to close the **Cookies - Exceptions** window.

step 5 Click **OK** on the **Options** window to save your changes and close the window.

Turn on JavaScript and cookies in Firefox (Mac)

Note: Check your browser's help for the most current information on configuration options.

» To turn on JavaScript and cookies in Firefox (Mac)

step 1 Start Firefox.

step 2 Turn on JavaScript:

2a Select **Preferences...** on the **Firefox** menu and click **Content**.
The content handling options are displayed.

2b Make sure **Enable JavaScript** is checked.

Note: For better display of online help and the user interface, allow the TREx website to display popups and to load images.

step 3 Turn on cookies:

3a Click **Privacy** at the top of the window.
The Privacy tabs are displayed.

3b Click the **Cookies** tab.
The Cookies options are displayed.

3c Click **Exceptions** (beside the **Allow sites to set Cookies** check box).
The **Exceptions - Cookies** window opens.

3d Type the TEAL url, https://pryor.tea.state.tx.us/ in the **Address of web site:**

text box and click **Allow**.
The url is moved to the list of website exceptions. The status column should say **Allow**.

step 4 Close the Firefox preferences window.

Turn on JavaScript and cookies in Safari

Note: Check your browser's help for the most current information on configuration options.

» To turn on JavaScript and cookies in Safari

step 1 Start Safari.

step 2 Select **Preferences** from the Safari menu and click the **Security** tab.
The Security window opens.

step 3 Configure the following settings:

- **Web content: Enable JavaScript** is checked, **Block popups** is cleared (not checked).
- **Accept cookies:** Either **Always** or **Only from sites you navigate to** is selected.

Texas Records Exchange System (TREx) Pages

The following TREx screen captures are organized according to the functional areas of the TREx in which they are encountered. When the same page appears in more than one task within a functional area, or when it appears in a different functional area, it is not listed more than once.

The following functional areas of TREx are covered in this reference:

Reset Password Page (p. 75)
Finding Transactions Pages (p. 77)
Inbound Requests Pages (p. 81)
Inbound Records/Transcripts Pages (p. 85)
Outbound Requests Pages (p. 87)
Outbound Records/Transcripts Pages (p. 89)
Request a Record/Transcript Pages (p. 91)
Send One Record/Transcript Pages (p. 95)
Send Multiple Records/Transcripts Pages (p. 99)
Manage Records/Transcripts Pages (p. 103)

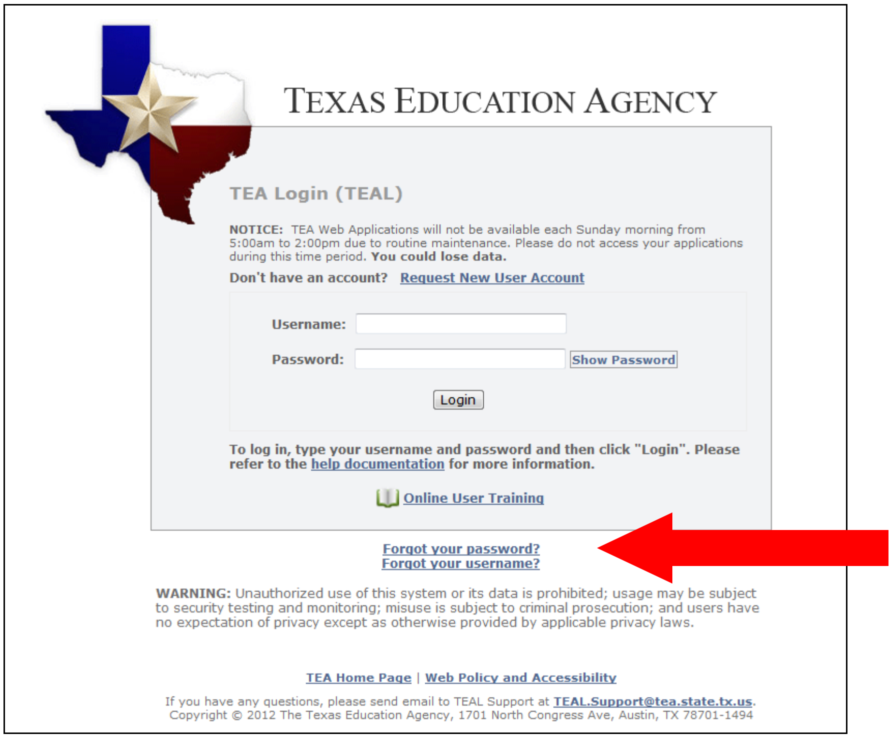
Reset Password Page

This page is used for the following workflow:

Reset a forgotten password (p. xvi)

Reset password page

The **Reset Password** page enables you to regain access to your TREx account after you have forgotten your password. TREx access is controlled through the Texas Education Agency Logon (TEAL) secure logon web portal.


TEXAS EDUCATION AGENCY
TEA Login (TEAL)
Username:
Password:
Show Password
Login
Online User Training
Forgot your password?
Forgot your username?
TEA Home Page | Web Policy and Accessibility

NOTICE: TEA Web Applications will not be available each Sunday morning from 5:00am to 2:00pm due to routine maintenance. Please do not access your applications during this time period. **You could lose data.**

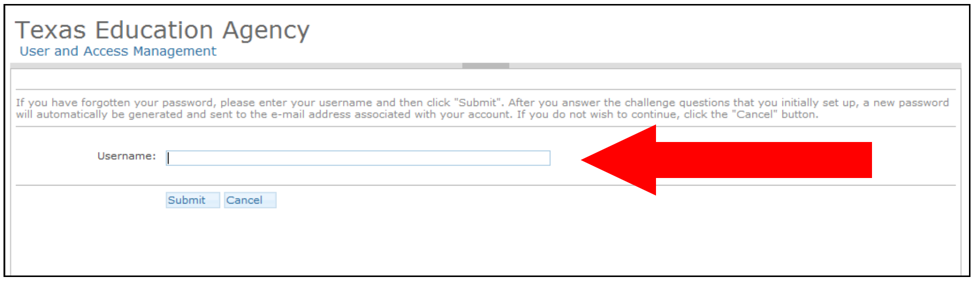
Don't have an account? Request New User Account

To log in, type your username and password and then click "Login". Please refer to the help documentation for more information.

WARNING: Unauthorized use of this system or its data is prohibited; usage may be subject to security testing and monitoring; misuse is subject to criminal prosecution; and users have no expectation of privacy except as otherwise provided by applicable privacy laws.

If you have any questions, please send email to TEAL Support at TEAL.Support@tea.state.tx.us.
Copyright © 2012 The Texas Education Agency, 1701 North Congress Ave, Austin, TX 78701-1494

Figure 34: You must have access to the email account associated with your TEA SE account to reset your password. After submitting your reset request you will receive an email with a new temporary password.


Texas Education Agency
User and Access Management
Username:
Submit
Cancel

If you have forgotten your password, please enter your username and then click "Submit". After you answer the challenge questions that you initially set up, a new password will automatically be generated and sent to the e-mail address associated with your account. If you do not wish to continue, click the "Cancel" button.

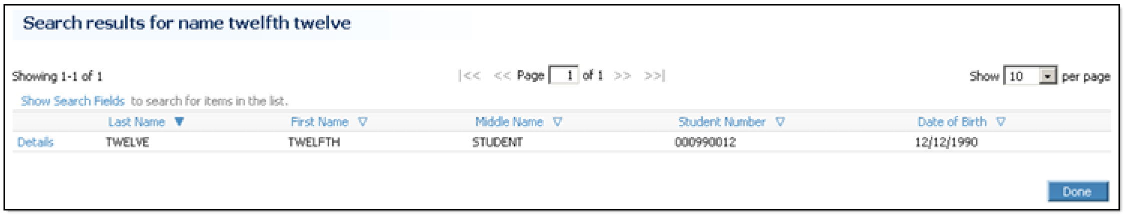
Finding Transactions Pages

The pages in this section are used in one or more of the following workflows:

Look up transactions by student name (p. xvii)
View completed transactions (p. xvii)
Look up a transaction by tracking number (p. xviii)

Search results (Student name search)

The **Search results for [student name]** page shows you the names that match the student name that you entered in the search boxes.



Search results for name twelfth twelve

Showing 1-1 of 1

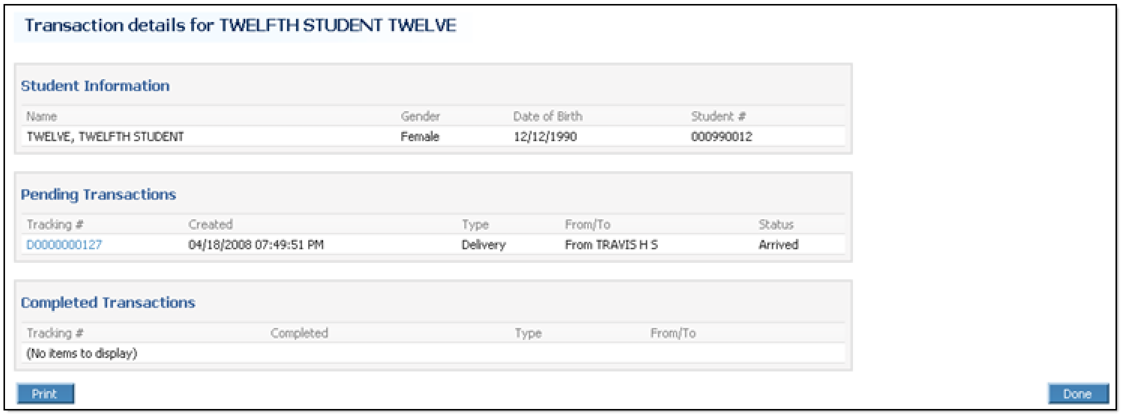
Show Search Fields to search for items in the list.

	Last Name	First Name	Middle Name	Student Number	Date of Birth
Details	TWELVE	TWELFTH	STUDENT	000990012	12/12/1990

Figure 35: Search results for a name search.

Transaction details for [student name] page

The **Transaction details for [student name]** page shows your institution's transaction history for a particular student that you have looked up by name. From this page you can look at the histories of individual transactions.



Transaction details for TWELFTH STUDENT TWELVE

Student Information

Name	Gender	Date of Birth	Student #
TWELVE, TWELFTH STUDENT	Female	12/12/1990	000990012

Pending Transactions

Tracking #	Created	Type	From/To	Status
D0000000127	04/18/2008 07:49:51 PM	Delivery	From TRAVIS H S	Arrived

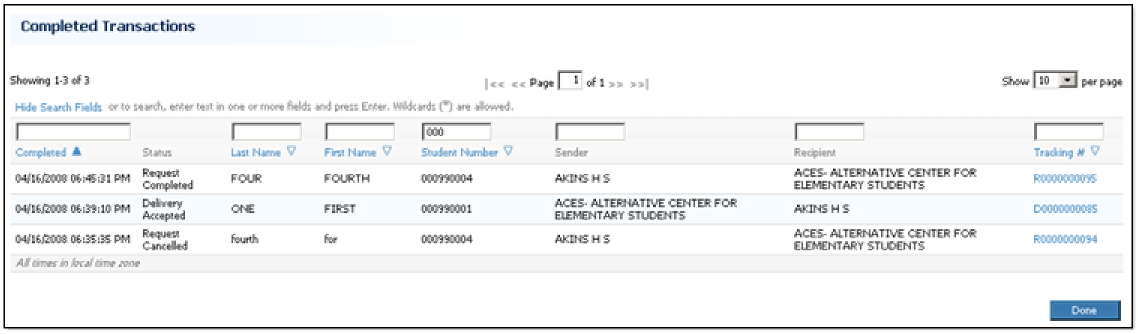
Completed Transactions

Tracking #	Completed	Type	From/To
(No items to display)			

Figure 36: The Transaction Details for [student name] report.

Completed Transactions page

The **Completed Transactions** page shows you transactions that have been resolved for which your institution was either the sender or recipient.



Showing 1-3 of 3

Hide Search Fields or to search, enter text in one or more fields and press Enter. Wildcards (*) are allowed.

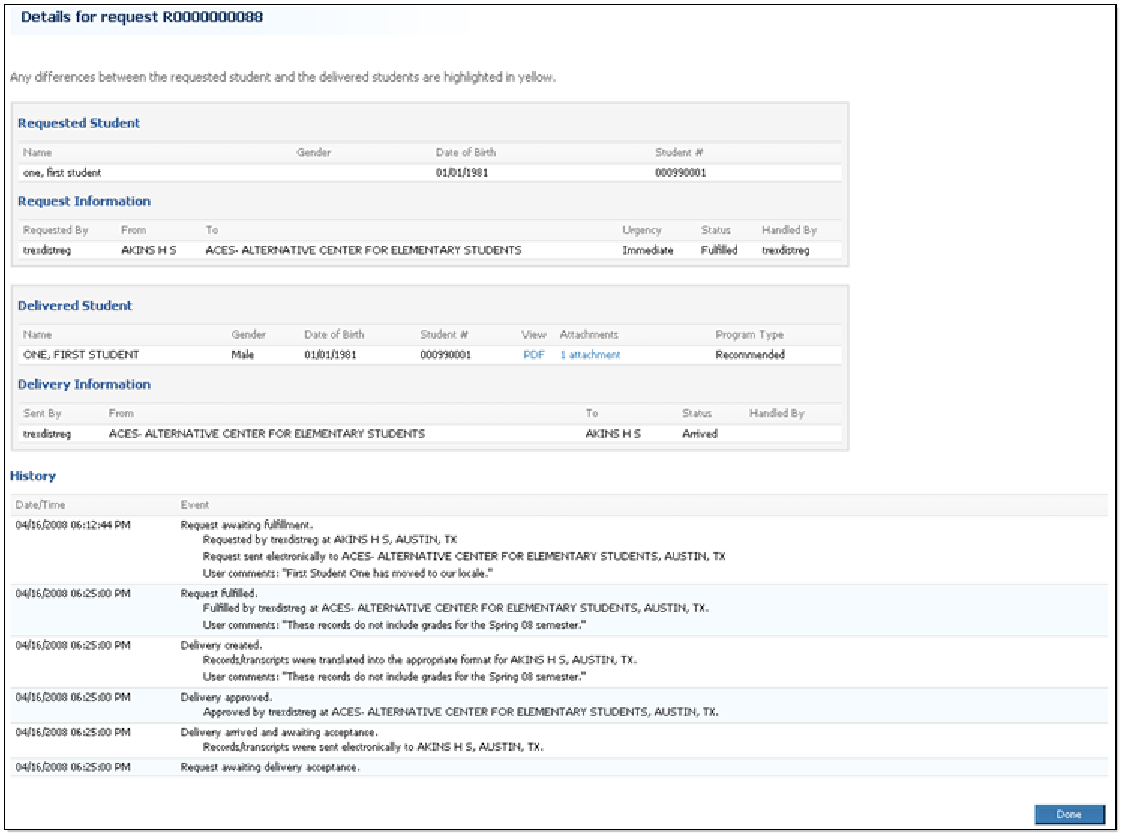
Completed ▲	Status	Last Name ▽	First Name ▽	Student Number ▽	Sender	Recipient	Tracking # ▽
				000			
04/16/2008 06:45:31 PM	Request Completed	FOUR	FOURTH	000990004	AKINS H S	ACES- ALTERNATIVE CENTER FOR ELEMENTARY STUDENTS	R000000095
04/16/2008 06:39:10 PM	Delivery Accepted	ONE	FIRST	000990001	ACES- ALTERNATIVE CENTER FOR ELEMENTARY STUDENTS	AKINS H S	D000000085
04/16/2008 06:35:35 PM	Request Cancelled	fourth	for	000990004	AKINS H S	ACES- ALTERNATIVE CENTER FOR ELEMENTARY STUDENTS	R000000094

All times in local time zone

Figure 37: The Completed Transactions page shows all of your transactions that have been completely processed.

Details for [transaction type tracking number] page

The **Details for [transaction type, tracking number]** page shows you a transaction's current status, its origin, and its history.



Any differences between the requested student and the delivered students are highlighted in yellow.

Requested Student

Name	Gender	Date of Birth	Student #
one, first student		01/01/1981	000990001

Request Information

Requested By	From	To	Urgency	Status	Handled By
trexdistreg	AKINS H S	ACES- ALTERNATIVE CENTER FOR ELEMENTARY STUDENTS	Immediate	Fulfilled	trexdistreg

Delivered Student

Name	Gender	Date of Birth	Student #	View	Attachments	Program Type
ONE, FIRST STUDENT	Male	01/01/1981	000990001	PDF	1 attachment	Recommended

Delivery Information

Sent By	From	To	Status	Handled By
trexdistreg	ACES- ALTERNATIVE CENTER FOR ELEMENTARY STUDENTS	AKINS H S	Arrived	

History

Date/Time	Event
04/16/2008 06:12:44 PM	Request awaiting fulfillment. Requested by trexdistreg at AKINS H S, AUSTIN, TX Request sent electronically to ACES- ALTERNATIVE CENTER FOR ELEMENTARY STUDENTS, AUSTIN, TX User comments: "First Student One has moved to our locale."
04/16/2008 06:25:00 PM	Request fulfilled. Fulfilled by trexdistreg at ACES- ALTERNATIVE CENTER FOR ELEMENTARY STUDENTS, AUSTIN, TX. User comments: "These records do not include grades for the Spring 08 semester."
04/16/2008 06:25:00 PM	Delivery created. Records/transcripts were translated into the appropriate format for AKINS H S, AUSTIN, TX. User comments: "These records do not include grades for the Spring 08 semester."
04/16/2008 06:25:00 PM	Delivery approved. Approved by trexdistreg at ACES- ALTERNATIVE CENTER FOR ELEMENTARY STUDENTS, AUSTIN, TX.
04/16/2008 06:25:00 PM	Delivery arrived and awaiting acceptance. Records/transcripts were sent electronically to AKINS H S, AUSTIN, TX.
04/16/2008 06:25:00 PM	Request awaiting delivery acceptance.

Figure 38: The Details for Tracking # page shows the complete history for a particular transaction.

Note: If a request transaction was fulfilled with a partial match, the differing fields are highlighted in yellow.

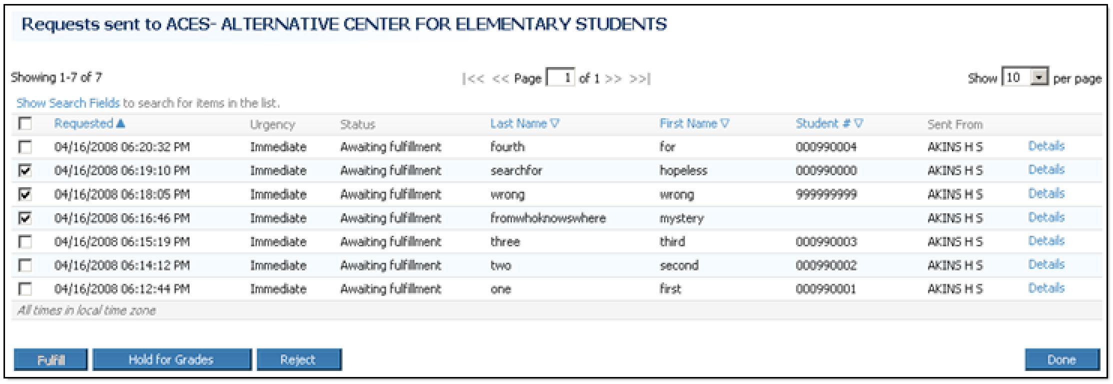
Inbound Requests Pages

The pages in this section are used in one or more of the following workflows:

- *Fulfill an inbound request* (p. 25)
- *Hold inbound requests* (p. 27)
- *Reject inbound requests* (p. 26)

Requests sent to [your institution] page

The **Requests sent to [your institution]** page shows you the inbound requests that are currently in your queue. It does not show you requests that you have already fulfilled or rejected.



Requests sent to ACES- ALTERNATIVE CENTER FOR ELEMENTARY STUDENTS

Showing 1-7 of 7

Show Search Fields to search for items in the list.

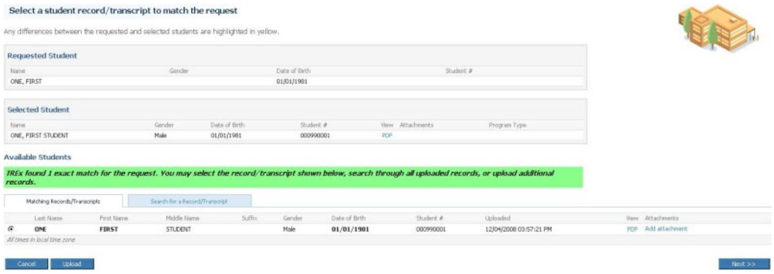
☐	Requested ▲	Urgency	Status	Last Name ▽	First Name ▽	Student # ▽	Sent From	
☐	04/16/2008 06:20:32 PM	Immediate	Awaiting fulfillment	fourth	for	000990004	AKINS H S	Details
☑	04/16/2008 06:19:10 PM	Immediate	Awaiting fulfillment	searchfor	hopeless	000990000	AKINS H S	Details
☑	04/16/2008 06:18:05 PM	Immediate	Awaiting fulfillment	wrong	wrong	999999999	AKINS H S	Details
☑	04/16/2008 06:16:46 PM	Immediate	Awaiting fulfillment	fromwhoknowswhere	mystery		AKINS H S	Details
☐	04/16/2008 06:15:19 PM	Immediate	Awaiting fulfillment	three	third	000990003	AKINS H S	Details
☐	04/16/2008 06:14:12 PM	Immediate	Awaiting fulfillment	two	second	000990002	AKINS H S	Details
☐	04/16/2008 06:12:44 PM	Immediate	Awaiting fulfillment	one	first	000990001	AKINS H S	Details

All times in local time zone

Figure 39: The Requests sent to [your institution] page with the Details popup shown.

Select Record/Transcript page (Fulfill a Request)

The **Select Record Transcript** page enables you to choose the student record to fulfill a request. It will show any matching records (either exact or partial matches) that are currently stored in the TREx database. If the student record/transcript is not currently stored in the TREx database, you can upload it using the **Upload** button on this page.



Select a student record/transcript to match the request

Any differences between the requested and selected students are highlighted in yellow.

Requested Student

Name	Gender	Date of Birth	Student #
ONE, FIRST		01/01/1981	

Selected Student

Name	Gender	Date of Birth	Student #	View	Attachments	Program Type
ONE, FIRST STUDENT	Male	01/01/1981	000990001	PDF		

Available Students

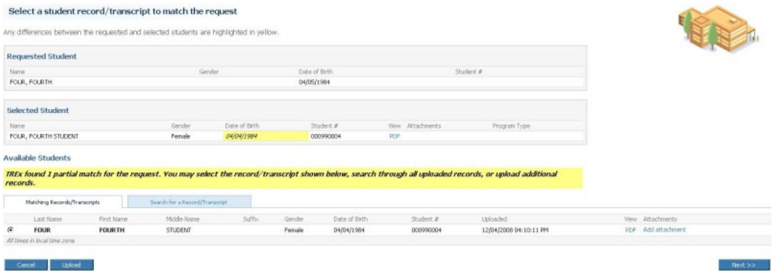
TREx found 1 exact match for the request. You may select the record/transcript shown below, search through all uploaded records, or upload additional records.

	Last Name	First Name	Middle Name	Suffix	Gender	Date of Birth	Student #	Uploaded	View	Attachments
●	**ONE**	**FIRST**	STUDENT		Male	**01/01/1981**	000990001	12/04/2008 03:57:21 PM	PDF	Add attachment

All times in local time zone

Figure 40: A green message informs you that TREx has found an exact match.

Exact matches are labeled with a green message and partial matches are labeled with a yellow message.



Select a student record/transcript to match the request

Any differences between the requested and selected students are highlighted in yellow.

Requested Student

Name	Gender	Date of Birth	Student #
FOUR, FOURTH		04/05/1984	

Selected Student

Name	Gender	Date of Birth	Student #	View	Attachments	Program Type
FOUR, FOURTH STUDENT	Female	04/04/1984	000990004	PDF		

Available Students

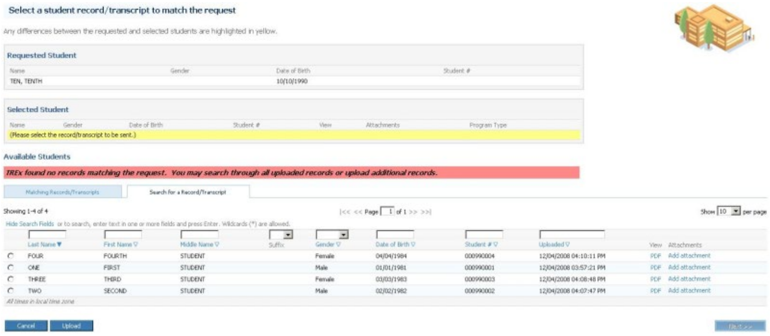
TREx found 1 partial match for the request. You may select the record/transcript shown below, search through all uploaded records, or upload additional records.

	Last Name	First Name	Middle Name	Suffix	Gender	Date of Birth	Student #	Uploaded	View	Attachments
●	FOUR	FOURTH	STUDENT		Female	04/04/1984	000990004	12/04/2008 04:10:11 PM	PDF	Add attachment

All times in local time zone

Figure 41: A yellow message informs you that TREx has found a partial match.

Requests that have no matching record display a red message.


Matching Records/Transcripts
Search for a Record/Transcript
|<< << Page 1 of 1 >> >>|
Show 10 per page
Hide Search Fields
Cancel
Upload
Next >>

Select a student record/transcript to match the request

Any differences between the requested and selected students are highlighted in yellow.

Requested Student

Name	Gender	Date of Birth	Student #
TEN, TENTH		10/10/1990	

Selected Student

Name	Gender	Date of Birth	Student #	View	Attachments	Program Type
(Please select the record/transcript to be sent.)						

Available Students

TREx found no records matching the request. You may search through all uploaded records or upload additional records.

Showing 1-4 of 4

or to search, enter text in one or more fields and press Enter. Wildcards (*) are allowed.

	Last Name ▼	First Name ▽	Middle Name ▽	Suffix	Gender ▽	Date of Birth ▽	Student # ▽	Uploaded ▽	View	Attachments
○	FOUR	FOURTH	STUDENT		Female	04/04/1984	000990004	12/04/2008 04:10:11 PM	PDF	Add attachment
○	ONE	FIRST	STUDENT		Male	01/01/1981	000990001	12/04/2008 03:57:21 PM	PDF	Add attachment
○	THREE	THIRD	STUDENT		Female	03/03/1983	000990003	12/04/2008 04:08:48 PM	PDF	Add attachment
○	TWO	SECOND	STUDENT		Male	02/02/1982	000990002	12/04/2008 04:07:47 PM	PDF	Add attachment

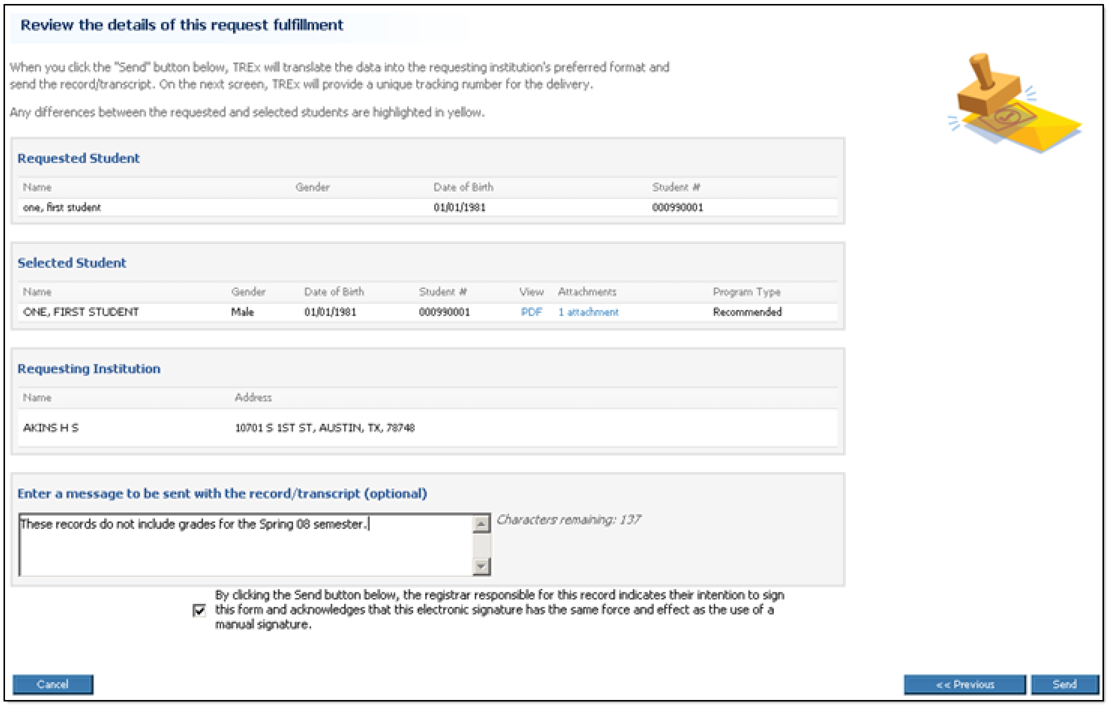
All times in local time zone

Figure 42: A red message informs you that no matching records have been found.

Confirm and Submit page (Fulfill a Request)

The **Confirm and Submit** page gives you the opportunity to review a fulfillment before you send it to the requesting institution.

Note: If you fulfill the request using a record that is a partial match, the differing fields are highlighted in yellow.



Review the details of this request fulfillment

When you click the "Send" button below, TREx will translate the data into the requesting institution's preferred format and send the record/transcript. On the next screen, TREx will provide a unique tracking number for the delivery.

Any differences between the requested and selected students are highlighted in yellow.

Requested Student

Name	Gender	Date of Birth	Student #
one, first student		01/01/1981	000990001

Selected Student

Name	Gender	Date of Birth	Student #	View	Attachments	Program Type
ONE, FIRST STUDENT	Male	01/01/1981	000990001	PDF	1 attachment	Recommended

Requesting Institution

Name	Address
AKINS H S	10701 S 1ST ST, AUSTIN, TX, 78748

Enter a message to be sent with the record/transcript (optional)

These records do not include grades for the Spring 08 semester.

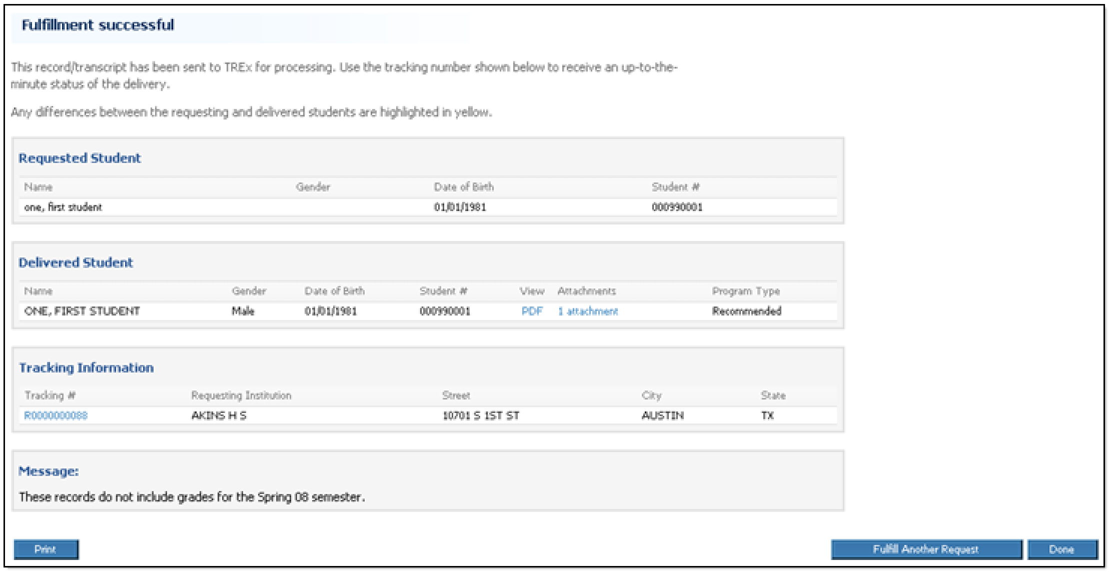
Characters remaining: 137

☑ By clicking the Send button below, the registrar responsible for this record indicates their intention to sign this form and acknowledges that this electronic signature has the same force and effect as the use of a manual signature.

Figure 43: Before you fulfill a request, you can review the details of the fulfillment.

Results page (Fulfill a request)

The **Results** page shows you the outcome of your record/transcript submission.



Fulfillment successful

This record/transcript has been sent to TREx for processing. Use the tracking number shown below to receive an up-to-the-minute status of the delivery.

Any differences between the requesting and delivered students are highlighted in yellow.

Requested Student

Name	Gender	Date of Birth	Student #
one, first student		01/01/1981	000990001

Delivered Student

Name	Gender	Date of Birth	Student #	View	Attachments	Program Type
ONE, FIRST STUDENT	Male	01/01/1981	000990001	PDF	1 attachment	Recommended

Tracking Information

Tracking #	Requesting Institution	Street	City	State
R0000000088	AKINS H S	10701 S 1ST ST	AUSTIN	TX

Message:

These records do not include grades for the Spring 08 semester.

Figure 44: The Results page from a request fulfillment.

Inbound Records/Transcripts Pages

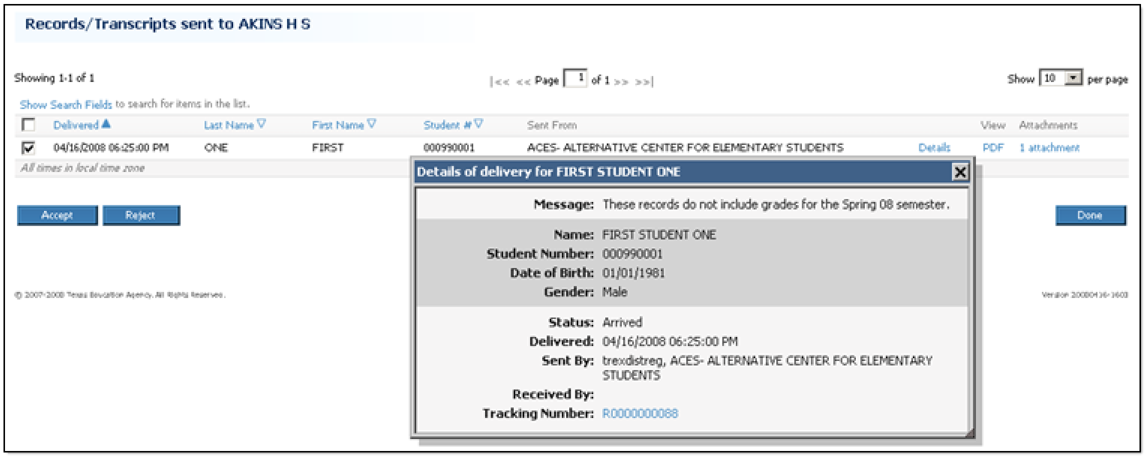
The page in this section is used in one or more of the following workflows:

Accept inbound records/transcripts (p. 29)

Reject inbound records/transcripts (p. 29)

Records/Transcripts sent to [your institution] page

The **Records/Transcripts sent to [your institution]** page shows records/transcripts that have been sent to you, either in response to your requests or in deliveries initiated by the sending institution.


Records/Transcripts sent to AKINS H S
Showing 1-1 of 1
|<< << Page 1 of 1 >> >>|
Show 10 per page
Show Search Fields to search for items in the list.
Accept
Reject
Done
Details of delivery for FIRST STUDENT ONE

☐	Delivered ▲	Last Name ▽	First Name ▽	Student # ▽	Sent From		View	Attachments
☑	04/16/2008 06:25:00 PM	ONE	FIRST	000990001	ACES- ALTERNATIVE CENTER FOR ELEMENTARY STUDENTS	Details	PDF	1 attachment

All times in local time zone

Message: These records do not include grades for the Spring 08 semester.

Name: FIRST STUDENT ONE
Student Number: 000990001
Date of Birth: 01/01/1981
Gender: Male

Status: Arrived
Delivered: 04/16/2008 06:25:00 PM
Sent By: trexdistreg, ACES- ALTERNATIVE CENTER FOR ELEMENTARY STUDENTS
Received By:
Tracking Number: R0000000088

Figure 45: The Records/Transcripts sent to [your institution] page with Details popup shown.

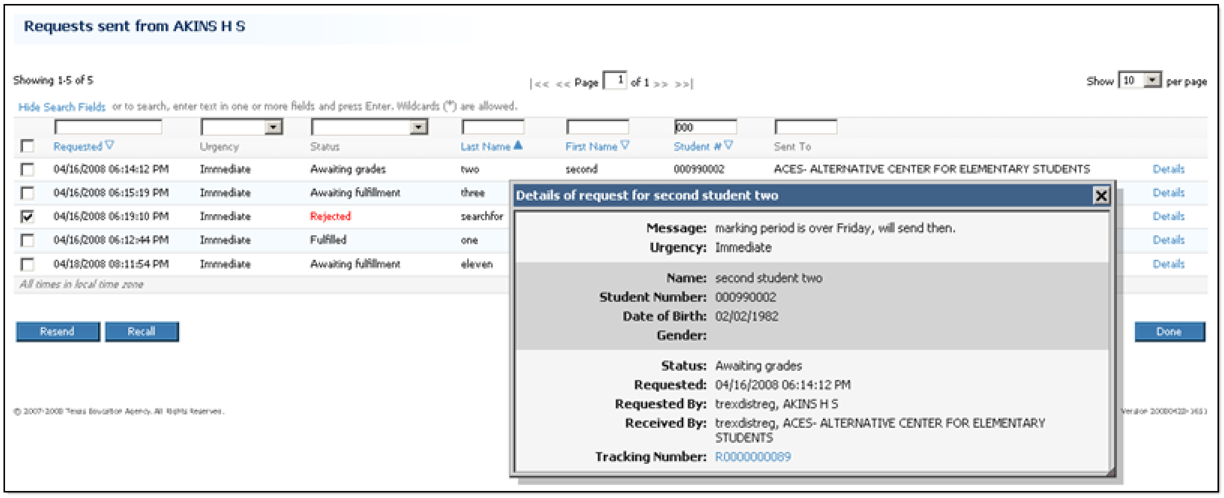
Outbound Requests Pages

The pages in this section are used in one or more of the following workflows:

- *View pending outbound requests* (p. 31)
- *Rejected outbound requests* (p. 31)

Requests sent from [your institution] page

The **Requests sent from [your institution]** page shows you requests that you have sent that have not yet been completed. Clicking Details shows more information about a transaction, including it's tracking number. You can click the tracking number to see a complete history of the transaction.



Requests sent from AKINS H S

Showing 1-5 of 5

|<< << Page 1 of 1 >> >>|

Show 10 per page

Hide Search Fields or to search, enter text in one or more fields and press Enter. Wildcards (*) are allowed.

Student #: 000

☐	Requested ▽	Urgency	Status	Last Name ▲	First Name ▽	Student # ▽	Sent To	
☐	04/16/2008 06:14:12 PM	Immediate	Awaiting grades	two	second	000990002	ACES- ALTERNATIVE CENTER FOR ELEMENTARY STUDENTS	Details
☐	04/16/2008 06:15:19 PM	Immediate	Awaiting fulfillment	three				Details
☑	04/16/2008 06:19:10 PM	Immediate	Rejected	searchfor				Details
☐	04/16/2008 06:12:44 PM	Immediate	Fulfilled	one				Details
☐	04/18/2008 08:11:54 PM	Immediate	Awaiting fulfillment	eleven				Details

All times in local time zone

Details of request for second student two

Message: marking period is over Friday, will send then.
Urgency: Immediate

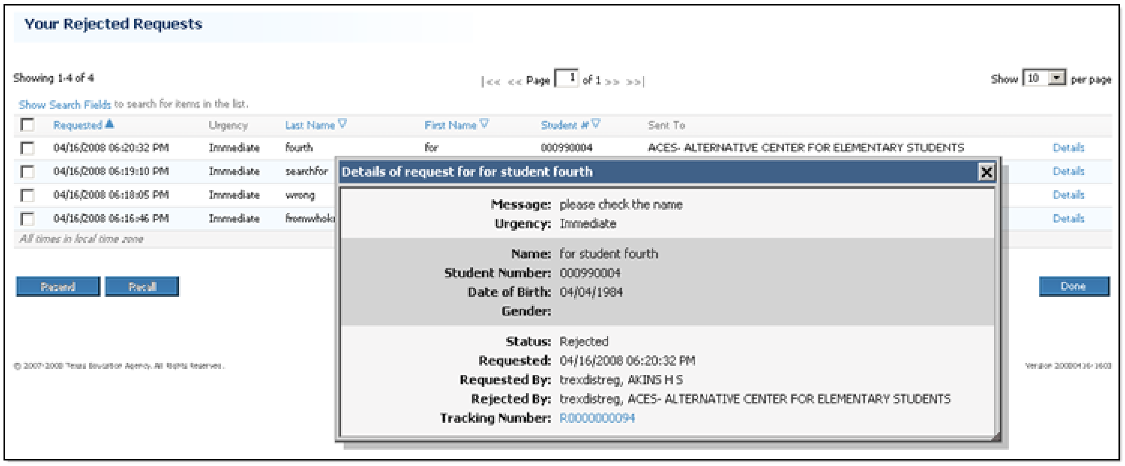
Name: second student two
Student Number: 000990002
Date of Birth: 02/02/1982
Gender:

Status: Awaiting grades
Requested: 04/16/2008 06:14:12 PM
Requested By: trexdistreg, AKINS H S
Received By: trexdistreg, ACES- ALTERNATIVE CENTER FOR ELEMENTARY STUDENTS
Tracking Number: R0000000089

Figure 46: The Requests sent from [your institution] page with Details popup shown.

Your Rejected Requests page

The **Your Rejected Requests** page shows you the requests you have made that have been rejected and are currently waiting for you to either resend or recall them.


Your Rejected Requests
|<< << Page 1 of 1 >> >>|
Show 10 per page
Resend
Recall
Done
Details of request for for student fourth

Showing 1-4 of 4

Show Search Fields to search for items in the list.

☐	Requested	Urgency	Last Name	First Name	Student #	Sent To	
☐	04/16/2008 06:20:32 PM	Immediate	fourth	for	000990004	ACES- ALTERNATIVE CENTER FOR ELEMENTARY STUDENTS	Details
☐	04/16/2008 06:19:10 PM	Immediate	searchfor				Details
☐	04/16/2008 06:18:05 PM	Immediate	wrong				Details
☐	04/16/2008 06:16:46 PM	Immediate	fromwhol				Details

All times in local time zone

Message: please check the name
Urgency: Immediate

Name: for student fourth
Student Number: 000990004
Date of Birth: 04/04/1984
Gender:

Status: Rejected
Requested: 04/16/2008 06:20:32 PM
Requested By: trexdistreg, AKINS H S
Rejected By: trexdistreg, ACES- ALTERNATIVE CENTER FOR ELEMENTARY STUDENTS
Tracking Number: R0000000094

Figure 47: The Your Rejected Requests page.

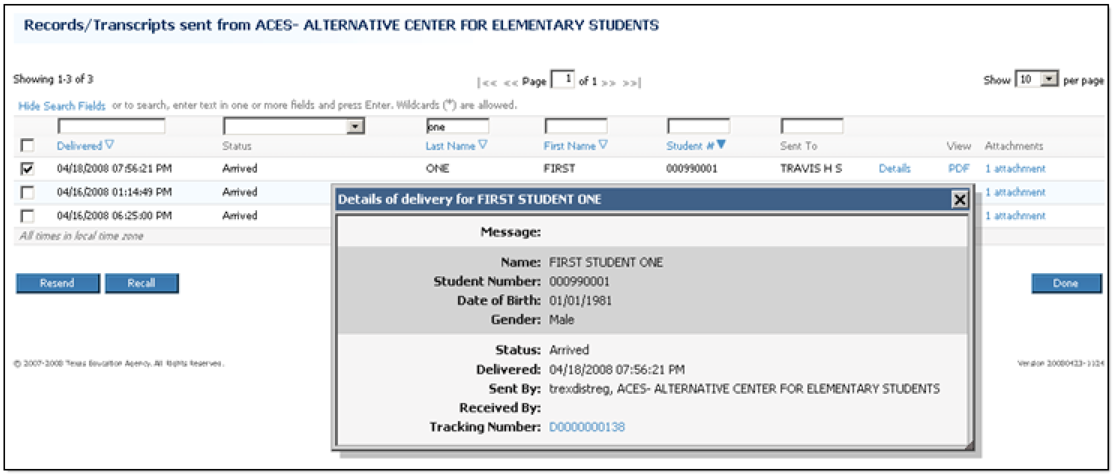
Outbound Records/Transcripts Pages

The pages in this section are used in one or more of the following workflows:

View pending outbound records/transcripts (p. 33)
Rejected outbound records/transcripts (p. 33)

Records/Transcripts sent from [your institution] page

The **Records/Transcripts sent from [your institution]** page shows records/transcripts that you have sent whose transaction status is not yet complete.



Records/Transcripts sent from ACES- ALTERNATIVE CENTER FOR ELEMENTARY STUDENTS

Showing 1-3 of 3

Hide Search Fields or to search, enter text in one or more fields and press Enter. Wildcards (*) are allowed.

Last Name search field: one

☐	Delivered	Status	Last Name	First Name	Student #	Sent To		View	Attachments
☑	04/18/2008 07:56:21 PM	Arrived	ONE	FIRST	000990001	TRAVIS H S	Details	PDF	1 attachment
☐	04/16/2008 01:14:49 PM	Arrived							1 attachment
☐	04/16/2008 06:25:00 PM	Arrived							1 attachment

All times in local time zone

Details of delivery for FIRST STUDENT ONE

Message:

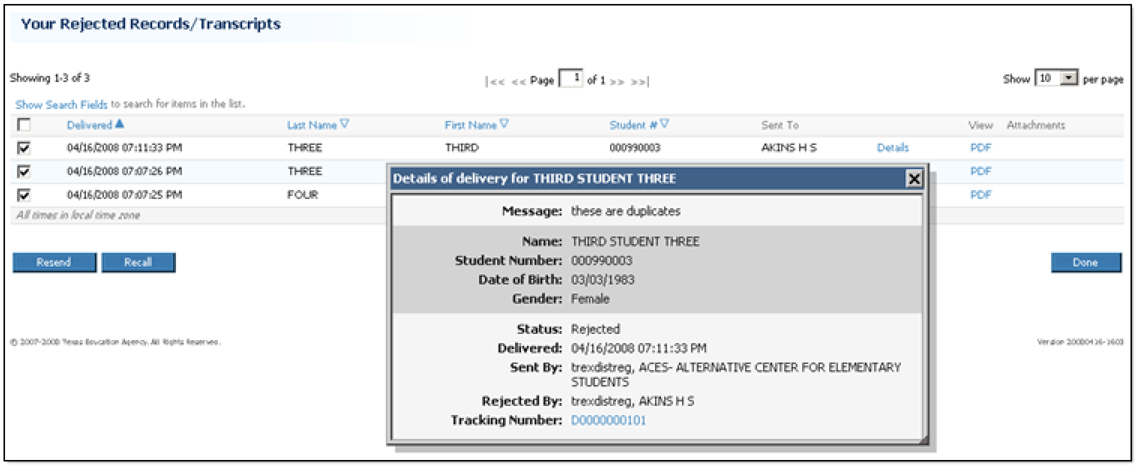
Name: FIRST STUDENT ONE
Student Number: 000990001
Date of Birth: 01/01/1981
Gender: Male

Status: Arrived
Delivered: 04/18/2008 07:56:21 PM
Sent By: trexdistreg, ACES- ALTERNATIVE CENTER FOR ELEMENTARY STUDENTS
Received By:
Tracking Number: D0000000138

Figure 48: The Records/Transcripts sent from your institution page with Details popup shown.

Your Rejected Records/Transcripts page

The **Your Rejected Records/Transcripts** page shows you deliveries that you have sent that have been rejected and are waiting for you to either send them again, recall them, or send them as printed documents.



Your Rejected Records/Transcripts

Showing 1-3 of 3

Show Search Fields to search for items in the list.

☐	Delivered ▲	Last Name ▽	First Name ▽	Student # ▽	Sent To		View	Attachments
☑	04/16/2008 07:11:33 PM	THREE	THIRD	000990003	AKINS H S	Details	PDF	
☑	04/16/2008 07:07:26 PM	THREE					PDF	
☑	04/16/2008 07:07:25 PM	FOUR					PDF	

All times in local time zone

Details of delivery for THIRD STUDENT THREE

Message: these are duplicates

Name: THIRD STUDENT THREE
Student Number: 000990003
Date of Birth: 03/03/1983
Gender: Female

Status: Rejected
Delivered: 04/16/2008 07:11:33 PM
Sent By: trexdistreg, ACES- ALTERNATIVE CENTER FOR ELEMENTARY STUDENTS
Rejected By: trexdistreg, AKINS H S
Tracking Number: D0000000101

Figure 49: The Your Rejected Records/Transcripts page.

Request a Record/Transcript Pages

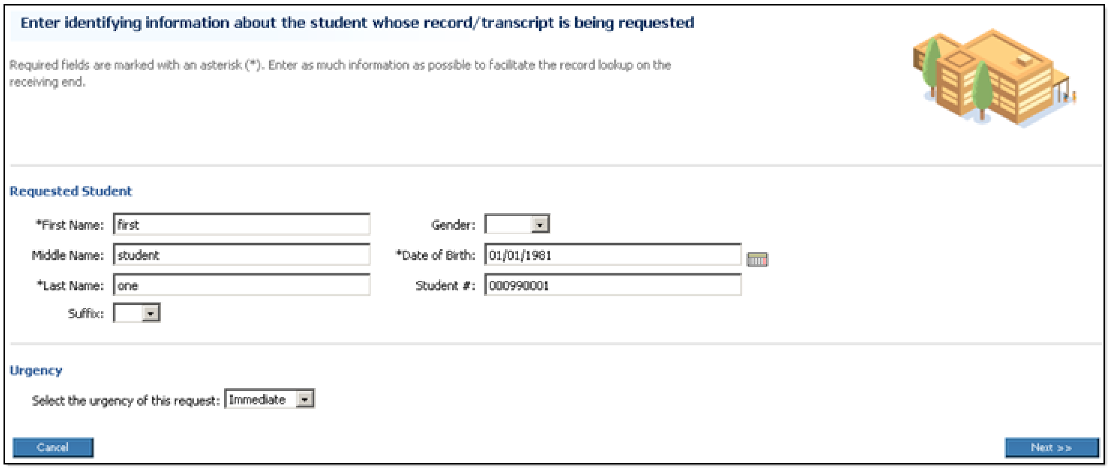
The pages in this section are used in one or more of the following workflows:

Request a record/transcript (p. 36)

Resend a request (p. 32)

Enter Student Information page (Request)

The **Enter Student Information** page collects student information used to make a record/transcript request. The **First Name**, **Last Name**, and **Date of Birth** fields are required entries for this page.



Enter identifying information about the student whose record/transcript is being requested

Required fields are marked with an asterisk (*). Enter as much information as possible to facilitate the record lookup on the receiving end.

Requested Student

*First Name: first

Middle Name: student

*Last Name: one

Suffix:

Gender:

*Date of Birth: 01/01/1981

Student #: 000990001

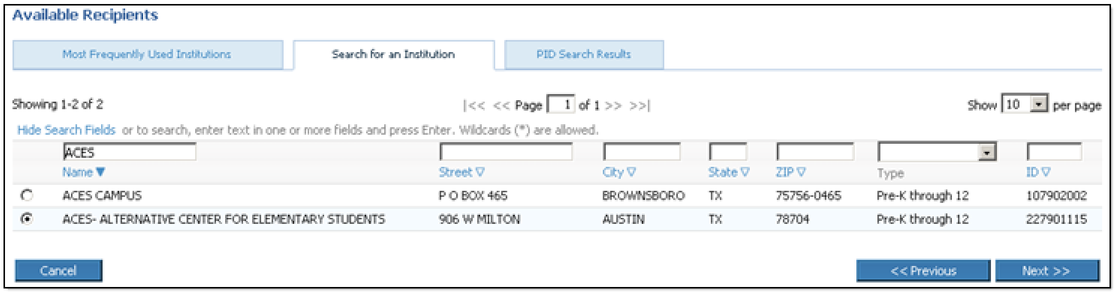
Urgency

Select the urgency of this request: Immediate

Figure 50: Enter as much information about a student as you can to help the sending institution find the correct record.

Select Institution page (Request)

The **Select Institution** page provides you with three tabs. The **Most Frequently Used Institutions** tab, the **Search for an Institution** tab, and the **PID Search** tab. You can select the request recipient using any one of these tabs.



Available Recipients

Showing 1-2 of 2

|<< << Page 1 of 1 >> >>|

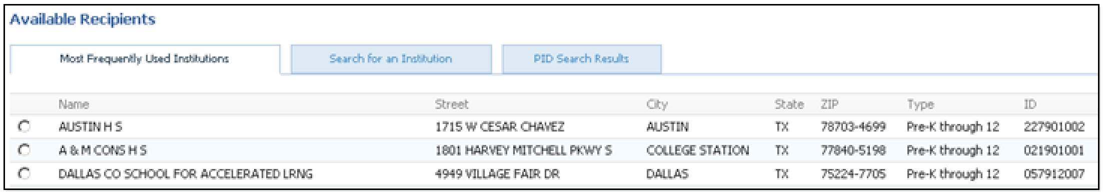
Show 10 per page

Hide Search Fields or to search, enter text in one or more fields and press Enter. Wildcards (*) are allowed.

	Name ▼	Street ▽	City ▽	State ▽	ZIP ▽	Type	ID ▽
	ACES						
○	ACES CAMPUS	P O BOX 465	BROWNSBORO	TX	75756-0465	Pre-K through 12	107902002
●	ACES- ALTERNATIVE CENTER FOR ELEMENTARY STUDENTS	906 W MILTON	AUSTIN	TX	78704	Pre-K through 12	227901115

Figure 51: The Select Institution page for a request.

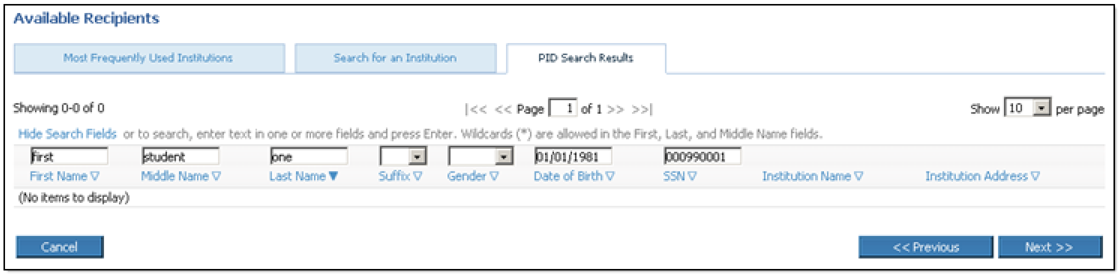
The **Search for an Institution** tab enables you to search through the entire list of available institutions using the search fields.


Available Recipients
Most Frequently Used Institutions
Search for an Institution
PID Search Results

	Name	Street	City	State	ZIP	Type	ID
○	AUSTIN H S	1715 W CESAR CHAVEZ	AUSTIN	TX	78703-4699	Pre-K through 12	227901002
○	A & M CONS H S	1801 HARVEY MITCHELL PKWY S	COLLEGE STATION	TX	77840-5198	Pre-K through 12	021901001
○	DALLAS CO SCHOOL FOR ACCELERATED LRNG	4949 VILLAGE FAIR DR	DALLAS	TX	75224-7705	Pre-K through 12	057912007

Figure 52: The Most Frequently Used Institutions tab lists recipients that you use more frequently.

The **Most Frequently Used Institutions** tab can save you time if you frequently send requests to the same several institutions.


Available Recipients
Most Frequently Used Institutions
Search for an Institution
PID Search Results
|<< << Page 1 of 1 >> >>|
Show 10 per page
Hide Search Fields
Cancel
<< Previous
Next >>

Showing 0-0 of 0

Hide Search Fields or to search, enter text in one or more fields and press Enter. Wildcards (*) are allowed in the First, Last, and Middle Name fields.

First Name ▽	Middle Name ▽	Last Name ▼	Suffix ▽	Gender ▽	Date of Birth ▽	SSN ▽	Institution Name ▽	Institution Address ▽
first	student	one			01/01/1981	000990001		

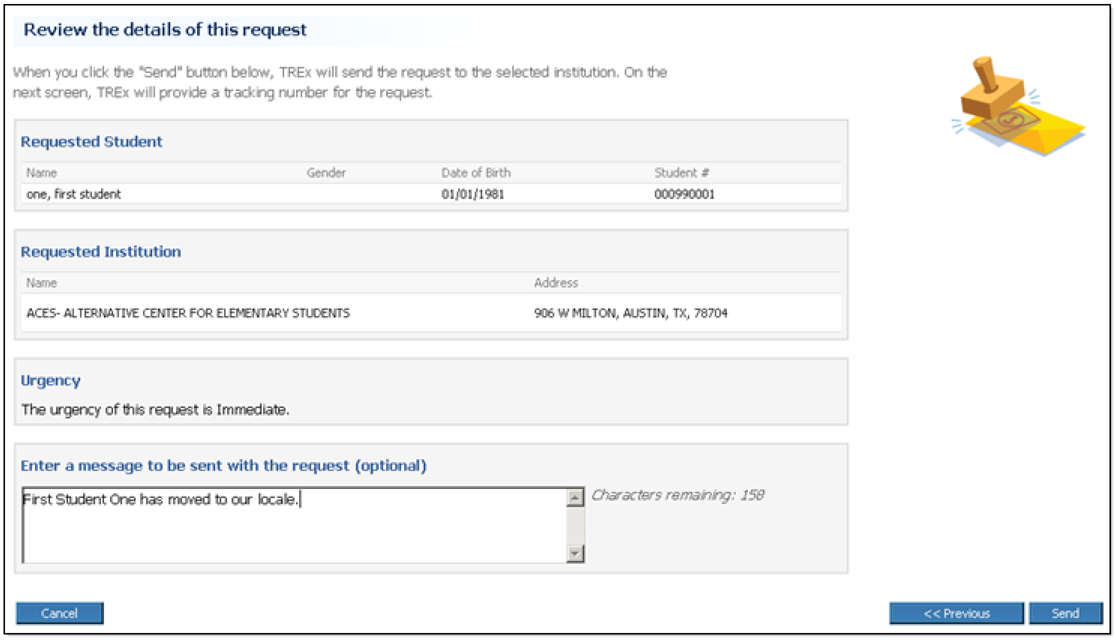
(No items to display)

Figure 53: The PID Search Results tab shows the most recent enrollment of the student according to TEA records.

The **PID Search Results** tab checks TEA records for the most recent enrollment records for the student whose SSN was entered when you filled in the student information for the request.

Note: Private School TREx users do not have access to the **PID Search Results** tab.

The **Confirm and Submit** page enables you to check the information you have entered before you send or resend a request.



Review the details of this request

When you click the "Send" button below, TREx will send the request to the selected institution. On the next screen, TREx will provide a tracking number for the request.

Requested Student

Name	Gender	Date of Birth	Student #
one, first student		01/01/1981	000990001

Requested Institution

Name	Address
ACES- ALTERNATIVE CENTER FOR ELEMENTARY STUDENTS	906 W MILTON, AUSTIN, TX, 78704

Urgency

The urgency of this request is Immediate.

Enter a message to be sent with the request (optional)

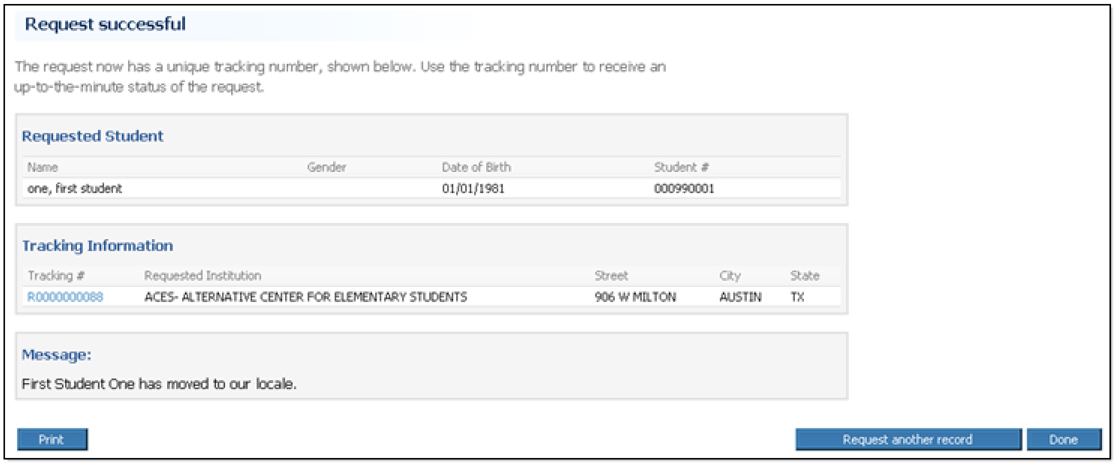
First Student One has moved to our locale.

Characters remaining: 158

Figure 54: Before you send a request, you can review the information you entered.

Results page

The **Results** page shows you the outcome of your request submission, including the unique tracking number that you can use to check on your request's status.



Request successful

The request now has a unique tracking number, shown below. Use the tracking number to receive an up-to-the-minute status of the request.

Requested Student

Name	Gender	Date of Birth	Student #
one, first student		01/01/1981	000990001

Tracking Information

Tracking #	Requested Institution	Street	City	State
R0000000088	ACES- ALTERNATIVE CENTER FOR ELEMENTARY STUDENTS	906 W MILTON	AUSTIN	TX

Message:

First Student One has moved to our locale.

Figure 55: The Results page for a request.

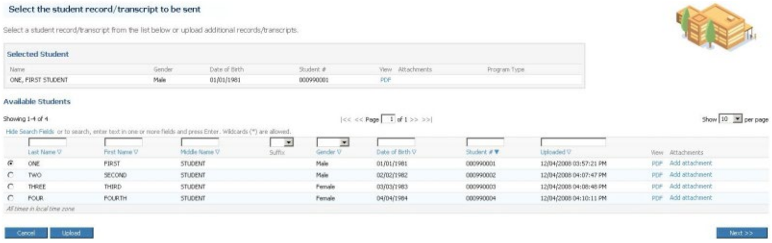
Send One Record/Transcript Pages

The pages in this section are used in the following workflow:

Send one record/transcript (p. 39)

Select Record/Transcript page (Send one record/transcript)

The **Select Record/Transcript** page enables you to select a student record/transcript to be sent to another institution.



Select the student record/transcript to be sent

Select a student record/transcript from the list below or upload additional records/transcripts.

Selected Student

Name	Gender	Date of Birth	Student #	View	Attachments	Program Type
ONE, FIRST STUDENT	Male	01/01/1981	000990001	PDF		

Available Students

Showing 1-4 of 4

|<< << Page 1 of 1 >> >>|

Show 10 per page

Hide Search Fields or to search, enter text in one or more fields and press Enter. Wildcards (*) are allowed.

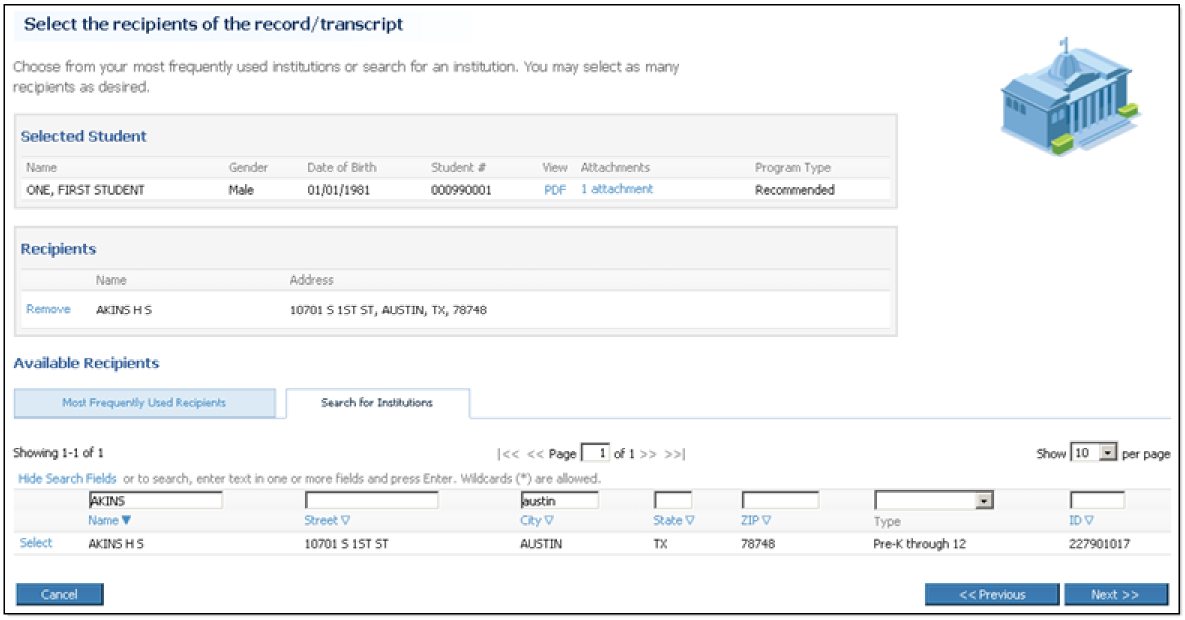
	Last Name ▽	First Name ▽	Middle Name ▽	Suffix	Gender ▽	Date of Birth ▽	Student # ▼	Uploaded ▽	View	Attachments
●	ONE	FIRST	STUDENT		Male	01/01/1981	000990001	12/04/2008 03:57:21 PM	PDF	Add attachment
○	TWO	SECOND	STUDENT		Male	02/02/1982	000990002	12/04/2008 04:07:47 PM	PDF	Add attachment
○	THREE	THIRD	STUDENT		Female	03/03/1983	000990003	12/04/2008 04:08:48 PM	PDF	Add attachment
○	FOUR	FOURTH	STUDENT		Female	04/04/1984	000990004	12/04/2008 04:10:11 PM	PDF	Add attachment

All times in local time zone

Figure 56: The Select Record Transcript page enables you to select the student record that you want to send.

Select Recipients page (Send one record/transcript)

The **Select Recipients** page enables you to select destinations for a record/transcript that you want to send. You can choose the recipients from the **Most Frequently Used Institutions** tab and the **Search for Institutions** tab. If your institution has the *National Option* (p. viii), you can also use the **Search for National Option Institutions** tab.



Select the recipients of the record/transcript

Choose from your most frequently used institutions or search for an institution. You may select as many recipients as desired.

Selected Student

Name	Gender	Date of Birth	Student #	View	Attachments	Program Type
ONE, FIRST STUDENT	Male	01/01/1981	000990001	PDF	1 attachment	Recommended

Recipients

	Name	Address
Remove	AKINS H S	10701 S 1ST ST, AUSTIN, TX, 78748

Available Recipients

Showing 1-1 of 1

|<< << Page 1 of 1 >> >>|

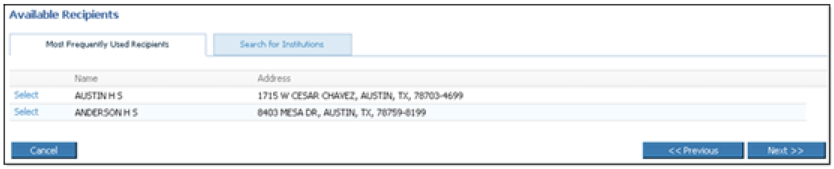
Show 10 per page

Hide Search Fields or to search, enter text in one or more fields and press Enter. Wildcards (*) are allowed.

	Name ▼	Street ▽	City ▽	State ▽	ZIP ▽	Type	ID ▽
	AKINS		austin				
Select	AKINS H S	10701 S 1ST ST	AUSTIN	TX	78748	Pre-K through 12	227901017

Figure 57: The Search for Institutions tab.

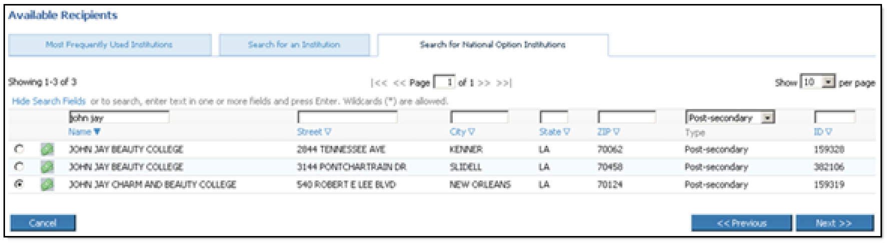
Note: The **Search for Institutions** tab shows more institution information than the **Most Frequently Used Institutions** tab to facilitate searches.


Available Recipients
Most Frequently Used Recipients
Search for Institutions
Cancel
<< Previous
Next >>

	Name	Address
Select	AUSTIN H S	1715 W CESAR CHAVEZ, AUSTIN, TX, 78703-4699
Select	ANDERSON H S	8403 MESA DR, AUSTIN, TX, 78759-8199

Figure 58: The Select Recipients page with the Most Frequently Used Institutions tab showing.

Note: The **Most Frequently Used Recipients** tab shows the institutions to which you send the most transactions.


Available Recipients
Most Frequently Used Institutions
Search for an Institution
Search for National Option Institutions
|<< << Page 1 of 1 >> >>|
Show 10 per page
Hide Search Fields
Cancel
<< Previous
Next >>

Showing 1-3 of 3

or to search, enter text in one or more fields and press Enter. Wildcards (*) are allowed.

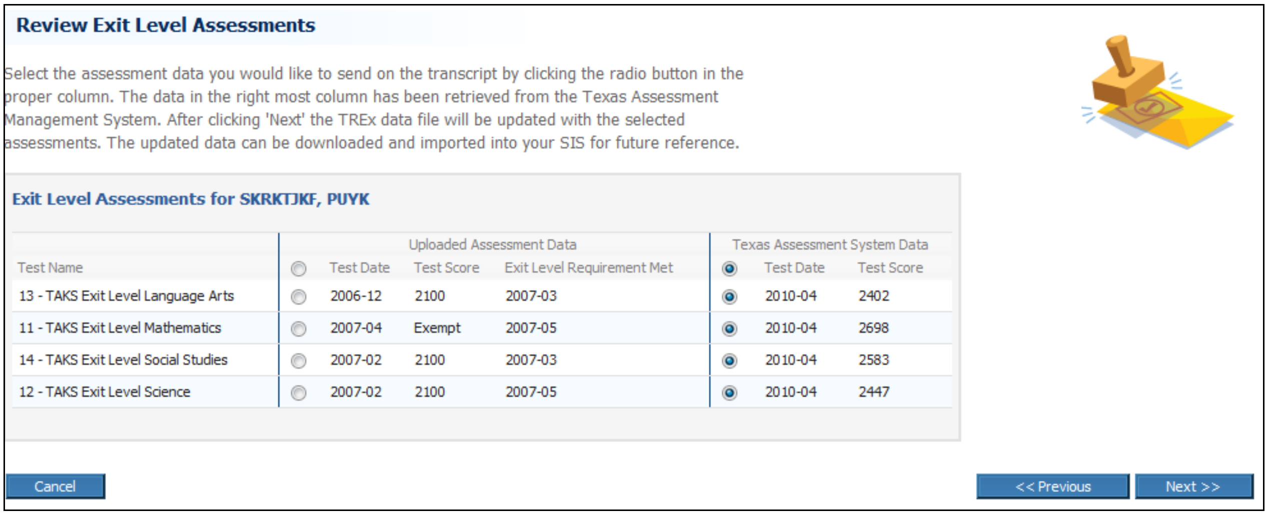
		Name	Street	City	State	ZIP	Type	ID
		john jay					Post-secondary	
○		JOHN JAY BEAUTY COLLEGE	2844 TENNESSEE AVE	KENNER	LA	70062	Post-secondary	159328
○		JOHN JAY BEAUTY COLLEGE	3144 PONTCHARTRAIN DR	SLIDELL	LA	70458	Post-secondary	382106
●		JOHN JAY CHARM AND BEAUTY COLLEGE	540 ROBERT E LEE BLVD	NEW ORLEANS	LA	70124	Post-secondary	159319

Figure 59: The National Option tab enables enrolled institutions to choose recipients outside of Texas for a nominal fee.

Note: If your institution has the National Option, you can search for institutions anywhere in the United States using the **Search for National Option Institutions** tab.

Review Exit level Assessments

The **Review Exit level Assessments** page shows you the assessments uploaded from your SIS and also the Assessment data acquired from the Pearson Texas Assessment System Data database. From this page you select which source you want to use for each assessment.


Cancel
<< Previous
Next >>

Review Exit Level Assessments

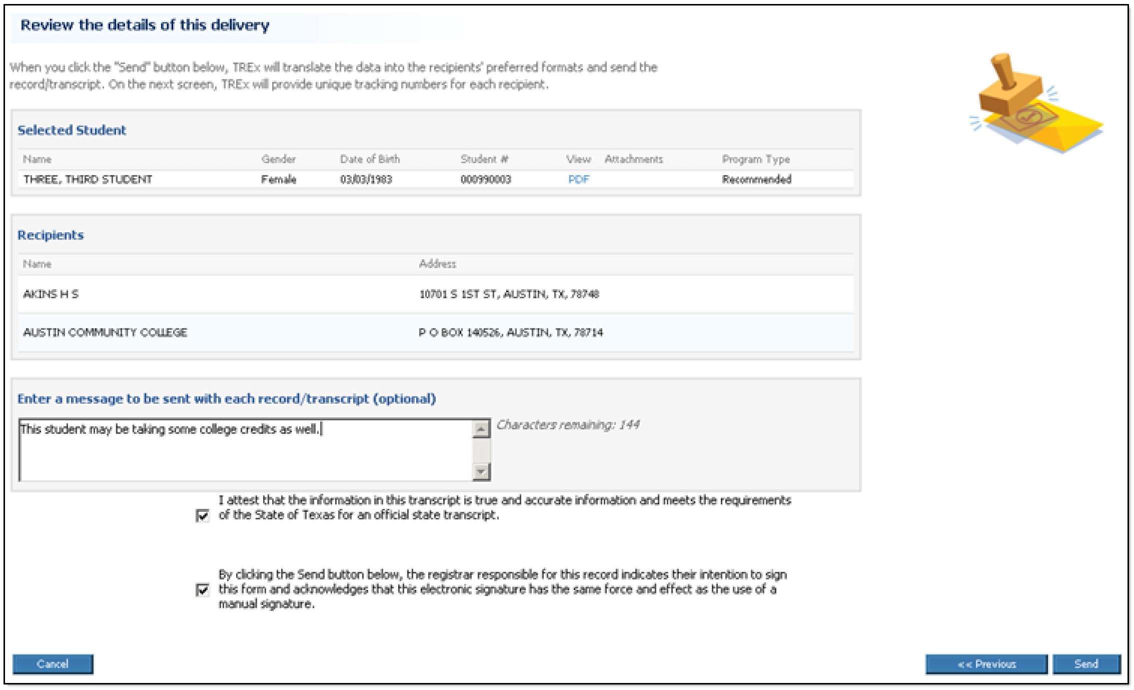
Select the assessment data you would like to send on the transcript by clicking the radio button in the proper column. The data in the right most column has been retrieved from the Texas Assessment Management System. After clicking 'Next' the TREx data file will be updated with the selected assessments. The updated data can be downloaded and imported into your SIS for future reference.

Exit Level Assessments for SKRKTJKF, PUYK

		Uploaded Assessment Data				Texas Assessment System Data	
Test Name	○	Test Date	Test Score	Exit Level Requirement Met	●	Test Date	Test Score
13 - TAKS Exit Level Language Arts	○	2006-12	2100	2007-03	●	2010-04	2402
11 - TAKS Exit Level Mathematics	○	2007-04	Exempt	2007-05	●	2010-04	2698
14 - TAKS Exit Level Social Studies	○	2007-02	2100	2007-03	●	2010-04	2583
12 - TAKS Exit Level Science	○	2007-02	2100	2007-05	●	2010-04	2447

Confirm and Submit page (send one record)

The **Confirm & Submit** page enables you to check the information you have entered before you send a student record/transcript.



Review the details of this delivery

When you click the "Send" button below, TREx will translate the data into the recipients' preferred formats and send the record/transcript. On the next screen, TREx will provide unique tracking numbers for each recipient.

Selected Student

Name	Gender	Date of Birth	Student #	View	Attachments	Program Type
THREE, THIRD STUDENT	Female	03/03/1983	000990003	PDF		Recommended

Recipients

Name	Address
AKINS H S	10701 S 1ST ST, AUSTIN, TX, 78748
AUSTIN COMMUNITY COLLEGE	P O BOX 140526, AUSTIN, TX, 78714

Enter a message to be sent with each record/transcript (optional)

This student may be taking some college credits as well.

Characters remaining: 144

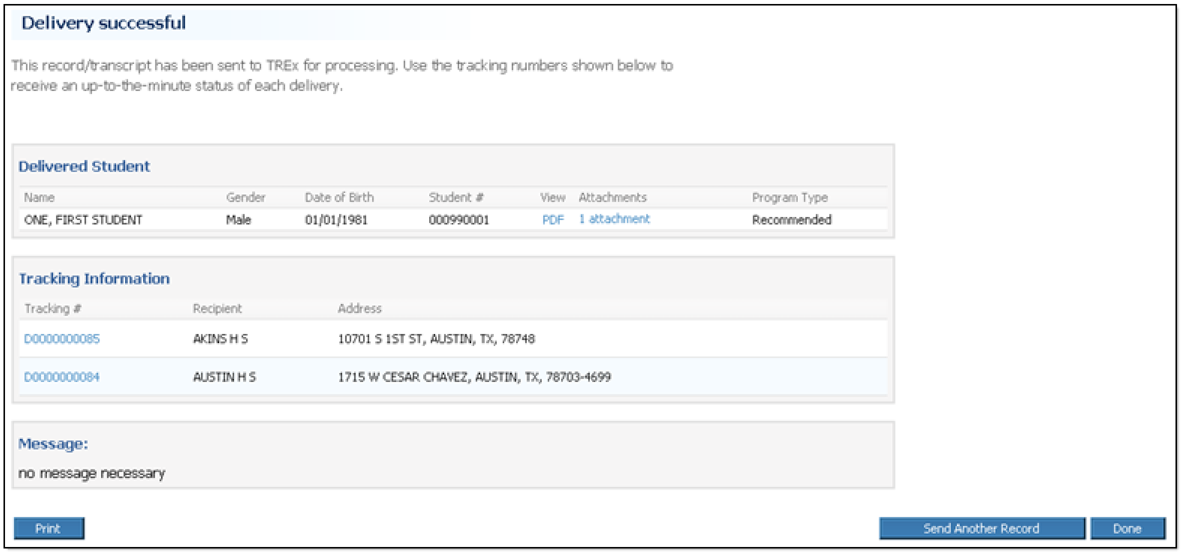
☑ I attest that the information in this transcript is true and accurate information and meets the requirements of the State of Texas for an official state transcript.

☑ By clicking the Send button below, the registrar responsible for this record indicates their intention to sign this form and acknowledges that this electronic signature has the same force and effect as the use of a manual signature.

Figure 60: You can review the details of your delivery before you send the record.

Results page (Send one record/transcript)

The **Results** page shows you the outcome of submitting one record/transcript to the TREx for delivery, including the unique tracking number assigned to each transaction created by the submission.



Delivery successful

This record/transcript has been sent to TREx for processing. Use the tracking numbers shown below to receive an up-to-the-minute status of each delivery.

Delivered Student

Name	Gender	Date of Birth	Student #	View	Attachments	Program Type
ONE, FIRST STUDENT	Male	01/01/1981	000990001	PDF	1 attachment	Recommended

Tracking Information

Tracking #	Recipient	Address
D0000000085	AKINS H S	10701 S 1ST ST, AUSTIN, TX, 78748
D0000000084	AUSTIN H S	1715 W CESAR CHAVEZ, AUSTIN, TX, 78703-4699

Message:

no message necessary

Figure 61: The results page for sending one record/transcript.

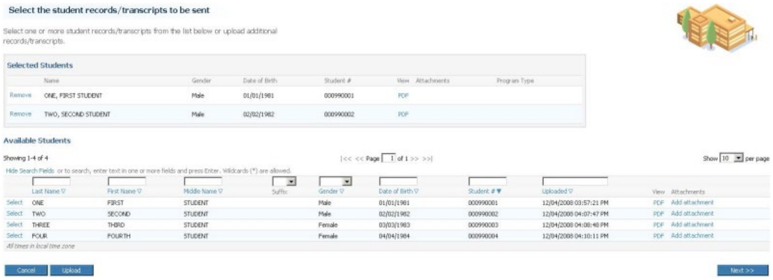
Send Multiple Records/Transcripts Pages

The pages in this section are used in the following workflow:

Send multiple records/transcripts (p. 41)

Select Records/Transcripts page (send multiple records/transcripts)

The **Select Records/Transcripts** page enables you to select several student records/transcripts to be sent to another institution.



Select the student records/transcripts to be sent

Select one or more student records/transcripts from the list below or upload additional records/transcripts.

Selected Students

	Name	Gender	Date of Birth	Student #	View	Attachments	Program Type
Remove	ONE, FIRST STUDENT	Male	01/01/1981	000990001	PDF		
Remove	TWO, SECOND STUDENT	Male	02/02/1982	000990002	PDF		

Available Students

Showing 1-4 of 4

Hide Search Fields or to search, enter text in one or more fields and press Enter. Wildcards (*) are allowed.

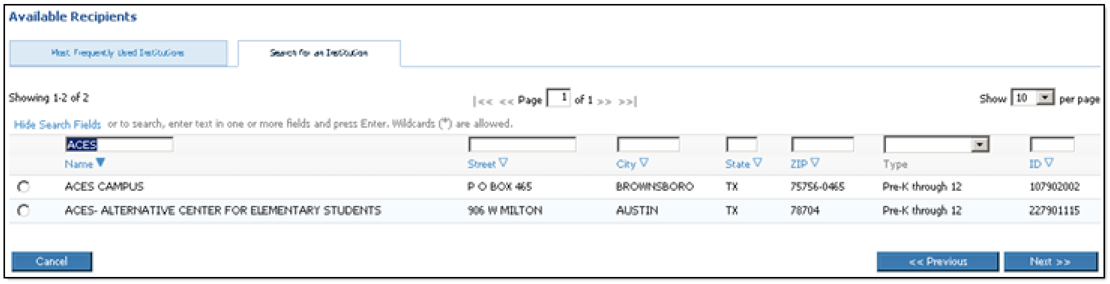
	Last Name ▽	First Name ▽	Middle Name ▽	Suffix	Gender ▽	Date of Birth ▽	Student # ▼	Uploaded ▽	View	Attachments
Select	ONE	FIRST	STUDENT		Male	01/01/1981	000990001	12/04/2008 03:57:21 PM	PDF	Add attachment
Select	TWO	SECOND	STUDENT		Male	02/02/1982	000990002	12/04/2008 04:07:47 PM	PDF	Add attachment
Select	THREE	THIRD	STUDENT		Female	03/03/1983	000990003	12/04/2008 04:08:48 PM	PDF	Add attachment
Select	FOUR	FOURTH	STUDENT		Female	04/04/1984	000990004	12/04/2008 04:10:11 PM	PDF	Add attachment

All times in local time zone

Figure 62: The Select Records/Transcripts page for sending multiple records/transcripts.

Select Recipient page (send multiple records/transcripts)

The **Select Recipient Institution** page enables you to chose the recipient of the multiple records/transcripts you send.



Available Recipients

Showing 1-2 of 2

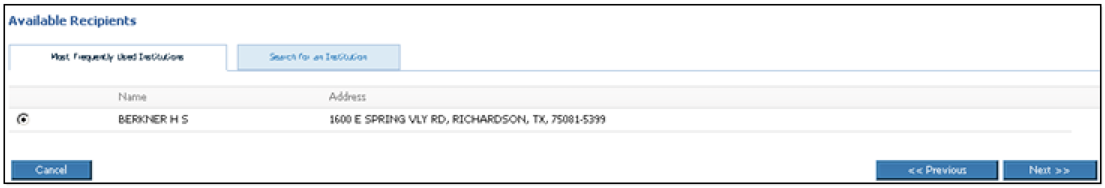
Hide Search Fields or to search, enter text in one or more fields and press Enter. Wildcards (*) are allowed.

	Name ▼	Street ▽	City ▽	State ▽	ZIP ▽	Type	ID ▽
	ACES						
○	ACES CAMPUS	P O BOX 465	BROWNSBORO	TX	75756-0465	Pre-K through 12	107902002
○	ACES- ALTERNATIVE CENTER FOR ELEMENTARY STUDENTS	906 W MILTON	AUSTIN	TX	78704	Pre-K through 12	227901115

Most Frequently Used Institutions
Search for an Institution
|<< << Page 1 of 1 >> >>|
Show 10 per page
Cancel
<< Previous
Next >>

Figure 63: The Select Recipient page for sending multiple records.

Note: The **Search for an Institution** tab shows more information than the **Most Frequently Used Recipients** tab to facilitate searches.

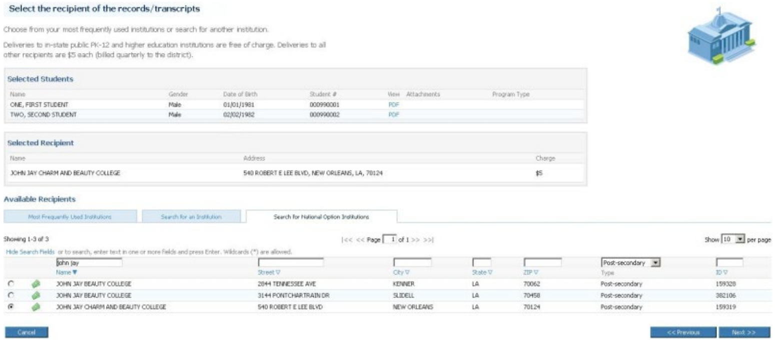


Available Recipients

	Name	Address
●	BERKNER H S	1600 E SPRING VLY RD, RICHARDSON, TX, 75081-5399

Figure 64: Select Recipient - Most Frequently Used Institutions tab.

If your institution has the National Option, you can also search for recipients outside of Texas using the **Search for National Option Institutions** tab.


Most Frequently Used Institutions
Search for an Institution
Search for National Option Institutions
Cancel
<< Previous
Next >>

Select the recipient of the records/transcripts

Choose from your most frequently used institutions or search for another institution.

Deliveries to in-state public PK-12 and higher education institutions are free of charge. Deliveries to all other recipients are $5 each (billed quarterly to the district).

Selected Students

Name	Gender	Date of Birth	Student #	View	Attachments	Program Type
ONE, FIRST STUDENT	Male	01/01/1981	000990001	PDF		
TWO, SECOND STUDENT	Male	02/02/1982	000990002	PDF		

Selected Recipient

Name	Address	Charge
JOHN JAY CHARM AND BEAUTY COLLEGE	540 ROBERT E LEE BLVD, NEW ORLEANS, LA, 70124	$5

Available Recipients

Showing 1-3 of 3 |<< << Page 1 of 1 >> >>| Show 10 per page

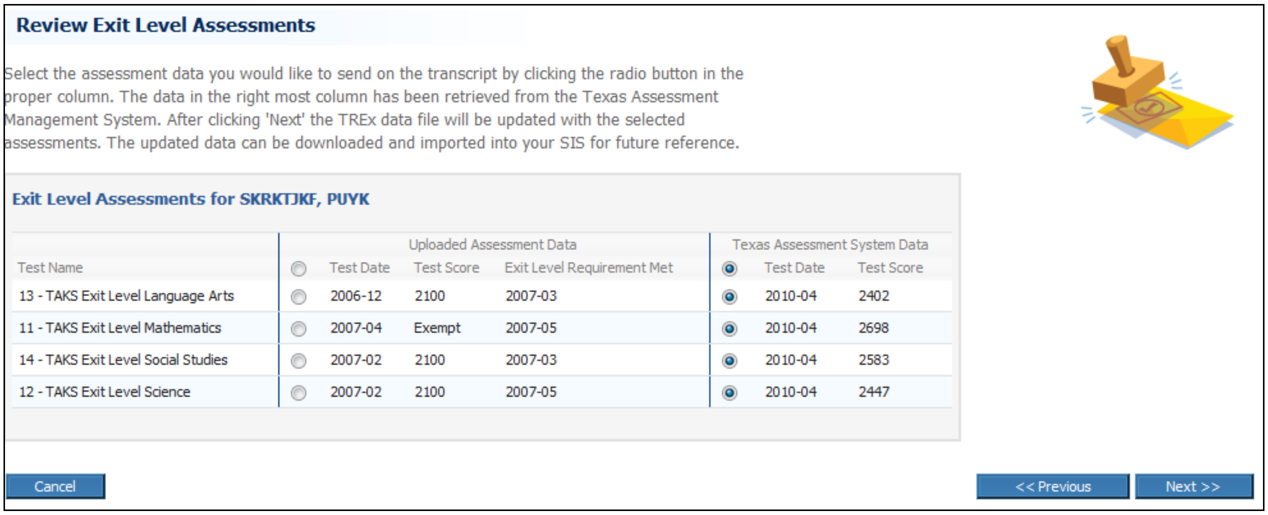
Hide Search Fields or to search, enter text in one or more fields and press Enter. Wildcards (*) are allowed.

		Name ▼	Street ▽	City ▽	State ▽	ZIP ▽	Type	ID ▽
		john jay					Post-secondary	
○		JOHN JAY BEAUTY COLLEGE	2844 TENNESSEE AVE	KENNER	LA	70062	Post-secondary	159328
○		JOHN JAY BEAUTY COLLEGE	3144 PONTCHARTRAIN DR	SLIDELL	LA	70458	Post-secondary	382106
●		JOHN JAY CHARM AND BEAUTY COLLEGE	540 ROBERT E LEE BLVD	NEW ORLEANS	LA	70124	Post-secondary	159319

Figure 65: The National Option tab enables enrolled institutions to choose recipients outside of Texas for a nominal fee.

Review Exit level Assessments

The **Review Exit level Assessments** page shows you the assessments uploaded from your SIS and also the Assessment data acquired from the Pearson Texas Assessment System Data database. From this page you select which source you want to use for each assessment.



Review Exit Level Assessments

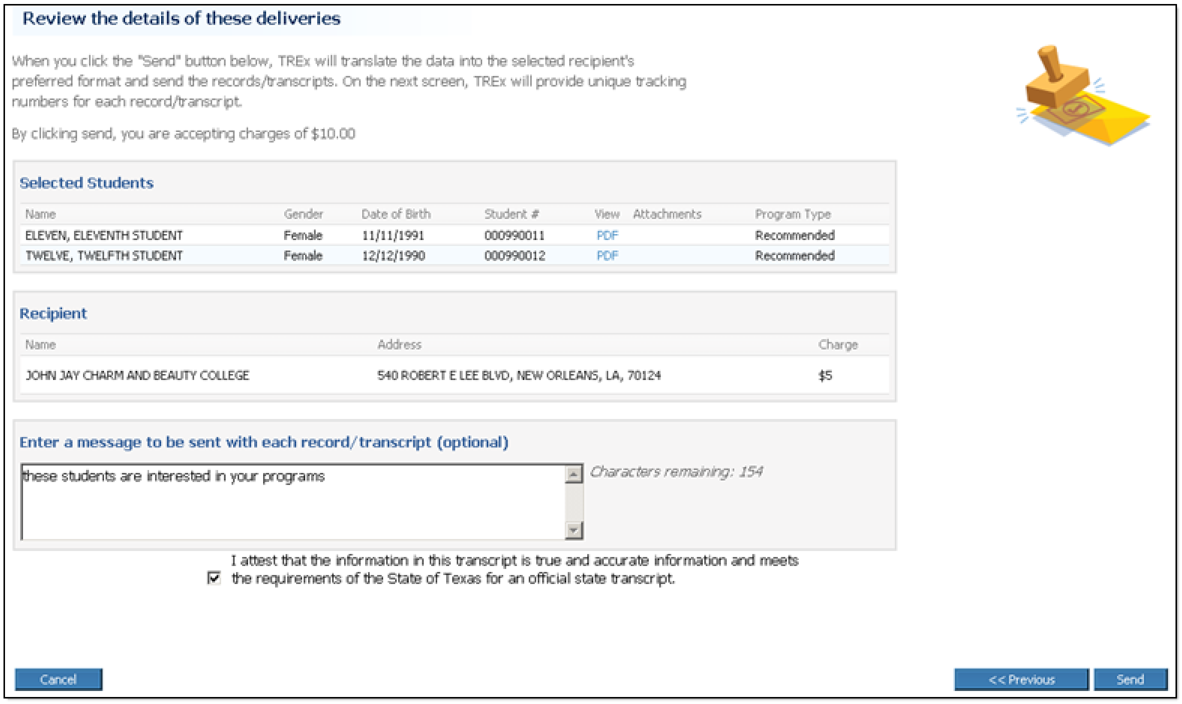
Select the assessment data you would like to send on the transcript by clicking the radio button in the proper column. The data in the right most column has been retrieved from the Texas Assessment Management System. After clicking 'Next' the TREx data file will be updated with the selected assessments. The updated data can be downloaded and imported into your SIS for future reference.

Exit Level Assessments for SKRKTJKF, PUYK

	Uploaded Assessment Data				Texas Assessment System Data		
Test Name	○	Test Date	Test Score	Exit Level Requirement Met	●	Test Date	Test Score
13 - TAKS Exit Level Language Arts	○	2006-12	2100	2007-03	●	2010-04	2402
11 - TAKS Exit Level Mathematics	○	2007-04	Exempt	2007-05	●	2010-04	2698
14 - TAKS Exit Level Social Studies	○	2007-02	2100	2007-03	●	2010-04	2583
12 - TAKS Exit Level Science	○	2007-02	2100	2007-05	●	2010-04	2447

Confirm and Submit page (send multiple records)

The **Confirm & Submit** page enables you to check the information you have entered before you send multiple records/transcripts.



Review the details of these deliveries

When you click the "Send" button below, TREx will translate the data into the selected recipient's preferred format and send the records/transcripts. On the next screen, TREx will provide unique tracking numbers for each record/transcript.

By clicking send, you are accepting charges of $10.00

Selected Students

Name	Gender	Date of Birth	Student #	View	Attachments	Program Type
ELEVEN, ELEVENTH STUDENT	Female	11/11/1991	000990011	PDF		Recommended
TWELVE, TWELFTH STUDENT	Female	12/12/1990	000990012	PDF		Recommended

Recipient

Name	Address	Charge
JOHN JAY CHARM AND BEAUTY COLLEGE	540 ROBERT E LEE BLVD, NEW ORLEANS, LA, 70124	$5

Enter a message to be sent with each record/transcript (optional)

these students are interested in your programs

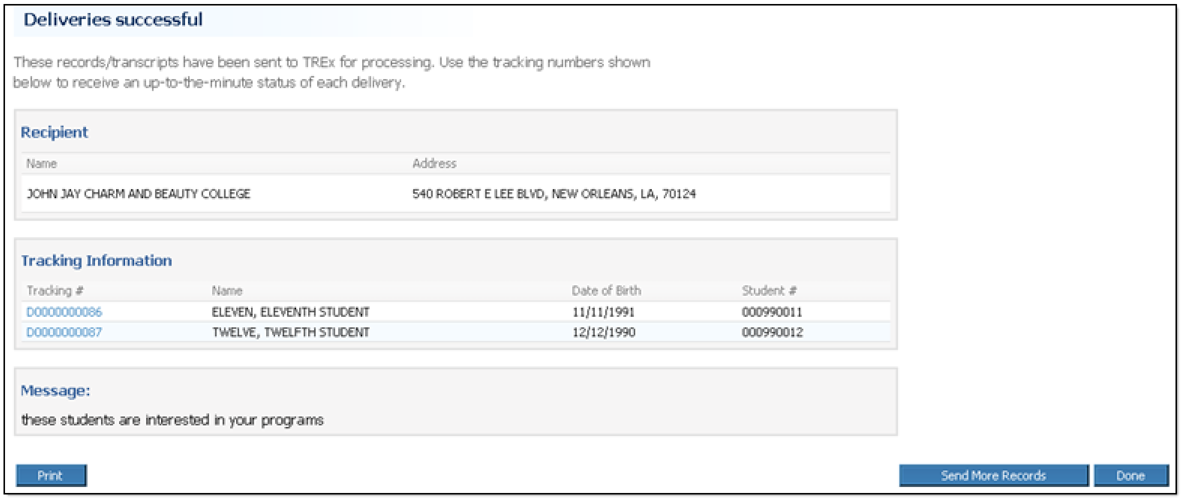
Characters remaining: 154

☑ I attest that the information in this transcript is true and accurate information and meets the requirements of the State of Texas for an official state transcript.

Figure 66: You can review the details of your delivery before you send the records.

Results page (send multiple records)

The **Results** (send multiple records) page shows you the outcome of submitting multiple records to the TREx for delivery.



Deliveries successful

These records/transcripts have been sent to TREx for processing. Use the tracking numbers shown below to receive an up-to-the-minute status of each delivery.

Recipient

Name	Address
JOHN JAY CHARM AND BEAUTY COLLEGE	540 ROBERT E LEE BLVD, NEW ORLEANS, LA, 70124

Tracking Information

Tracking #	Name	Date of Birth	Student #
D0000000086	ELEVEN, ELEVENTH STUDENT	11/11/1991	000990011
D0000000087	TWELVE, TWELFTH STUDENT	12/12/1990	000990012

Message:

these students are interested in your programs

Figure 67: The Results page from a send multiple records transaction.

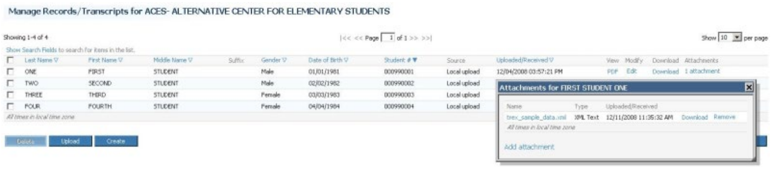
Manage Records/Transcripts Pages

The pages in this section are used in one or more of the following workflows:

- *Upload records to the TREx* (p. 43)
- *Add an attachment to a student record/transcript* (p. 49)
- *Remove a Student record from TREx* (p. 50)
- *Download records/transcripts from the TREx* (p. 50)
- *Create a Student Record/Transcript Using Manual Data Entry (MDE)* (p. 105)

Manage Records page

The **Manage Records** page enables you to view, upload, download and add attachments to your TREx student records.



Manage Records/Transcripts for ACES- ALTERNATIVE CENTER FOR ELEMENTARY STUDENTS

Showing 1-4 of 4

|<< << Page 1 of 1 >> >>|

Show 10 per page

Show Search Fields to search for items in the list.

☐	Last Name ▽	First Name ▽	Middle Name ▽	Suffix	Gender ▽	Date of Birth ▽	Student # ▼	Source	Uploaded/Received ▽	View	Modify	Download	Attachments
☐	ONE	FIRST	STUDENT		Male	01/01/1981	000990001	Local upload	12/04/2008 03:57:21 PM	PDF	Edit	Download	1 attachment
☐	TWO	SECOND	STUDENT		Male	02/02/1982	000990002	Local upload					
☐	THREE	THIRD	STUDENT		Female	03/03/1983	000990003	Local upload					
☐	FOUR	FOURTH	STUDENT		Female	04/04/1984	000990004	Local upload					

All times in local time zone

Attachments for FIRST STUDENT ONE

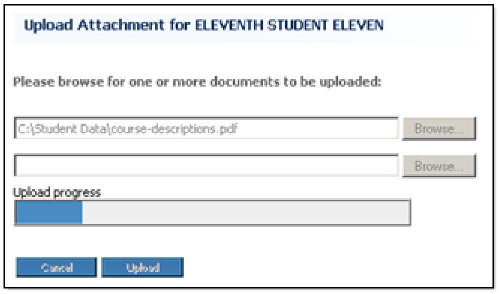
Name	Type	Uploaded/Received		
trex_sample_data.xml	XML Text	12/11/2008 11:35:32 AM	Download	Remove

All times in local time zone

Figure 68: You can upload, download, create, and delete student records and attachments from the Manage Records page.

Upload Attachment for [student name] page

The **Upload Attachment for [student name]** page enables you to browse for and upload one or more file attachments for a particular student record.



Upload Attachment for ELEVENTH STUDENT ELEVEN

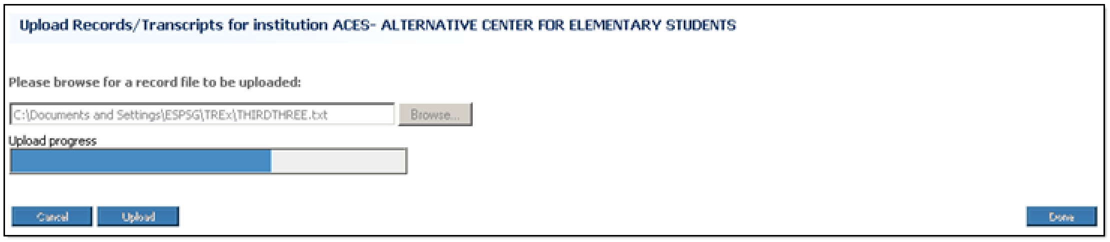
Please browse for one or more documents to be uploaded:

C:\Student Data\course-descriptions.pdf

Figure 69: The Upload Attachment page enables you to browse for files to attach to a student record.

Upload Records for [your institution] page

The **Upload Records for [your institution]** page enables you to browse your local computer for a file containing one or more exported student records to be uploaded to the TREx.



Upload Records/Transcripts for institution ACES- ALTERNATIVE CENTER FOR ELEMENTARY STUDENTS

Please browse for a record file to be uploaded: C:\Documents and Settings\ESPSG\TREx\THIRDTHREE.txt

Upload progress

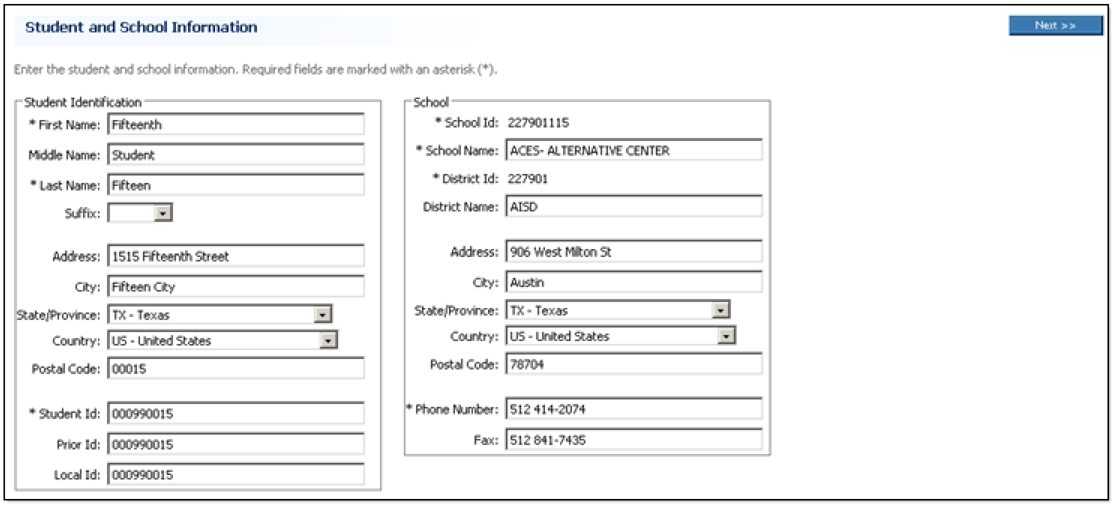
Figure 70: The Upload page with the progress bar shown.

Create a Student Record/Transcript Using Manual Data Entry (MDE)

Manual Data Entry - 1. Student and School Information

The **Student and School Information** page enables you to enter basic identifying information about the student whose record/transcript you are manually entering and about the sending school.

Note: You must supply all information marked with an asterisk (*). You cannot save your work, nor can you advance to the next step of Manual Data Entry until all required fields of Student School Information have been entered.



Student and School Information

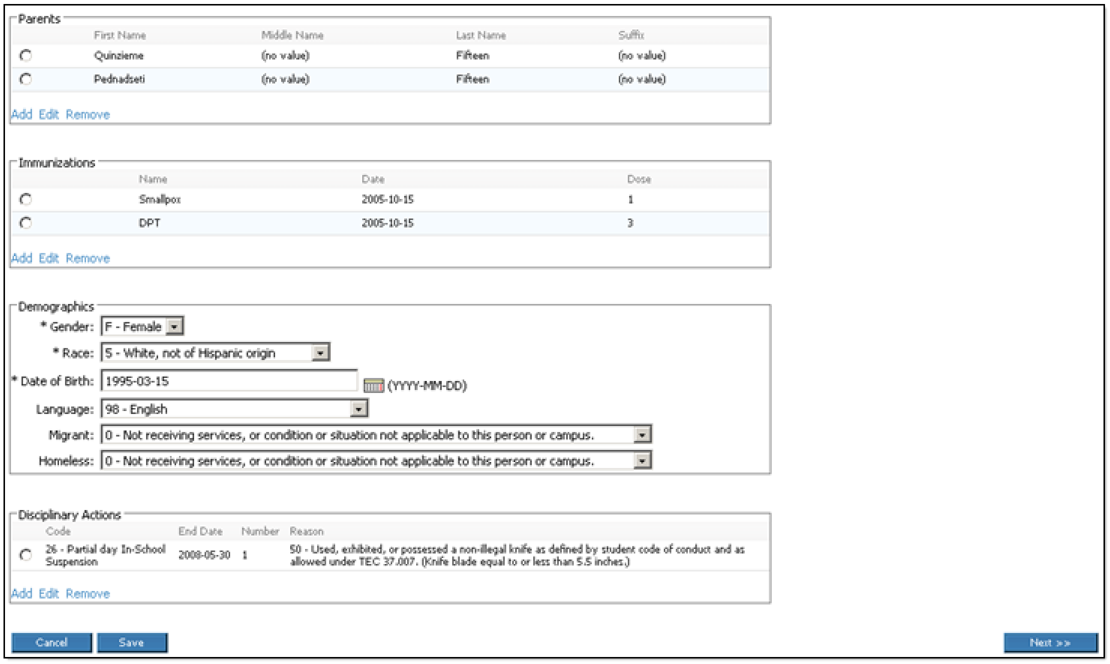
Enter the student and school information. Required fields are marked with an asterisk (*).

Student Identification
* First Name: Fifteenth
Middle Name: Student
* Last Name: Fifteen
Suffix:
Address: 1515 Fifteenth Street
City: Fifteen City
State/Province: TX - Texas
Country: US - United States
Postal Code: 00015
* Student Id: 000990015
Prior Id: 000990015
Local Id: 000990015

School
* School Id: 227901115
* School Name: ACES- ALTERNATIVE CENTER
* District Id: 227901
District Name: AISD
Address: 906 West Milton St
City: Austin
State/Province: TX - Texas
Country: US - United States
Postal Code: 78704
* Phone Number: 512 414-2074
Fax: 512 841-7435

Figure 71: The top section of the Student and School Information page specifies identifying information about the student and school for whom the record is being entered.

On this page, you can also specify supplemental information about the student's parents, immunizations, demographics, and disciplinary actions.



Parents

	First Name	Middle Name	Last Name	Suffix
○	Quinzieme	(no value)	Fifteen	(no value)
○	Pednadseti	(no value)	Fifteen	(no value)

Add Edit Remove

Immunizations

	Name	Date	Dose
○	Smallpox	2005-10-15	1
○	DPT	2005-10-15	3

Add Edit Remove

Demographics

* Gender: F - Female

* Race: 5 - White, not of Hispanic origin

* Date of Birth: 1995-03-15 (YYYY-MM-DD)

Language: 98 - English

Migrant: 0 - Not receiving services, or condition or situation not applicable to this person or campus.

Homeless: 0 - Not receiving services, or condition or situation not applicable to this person or campus.

Disciplinary Actions

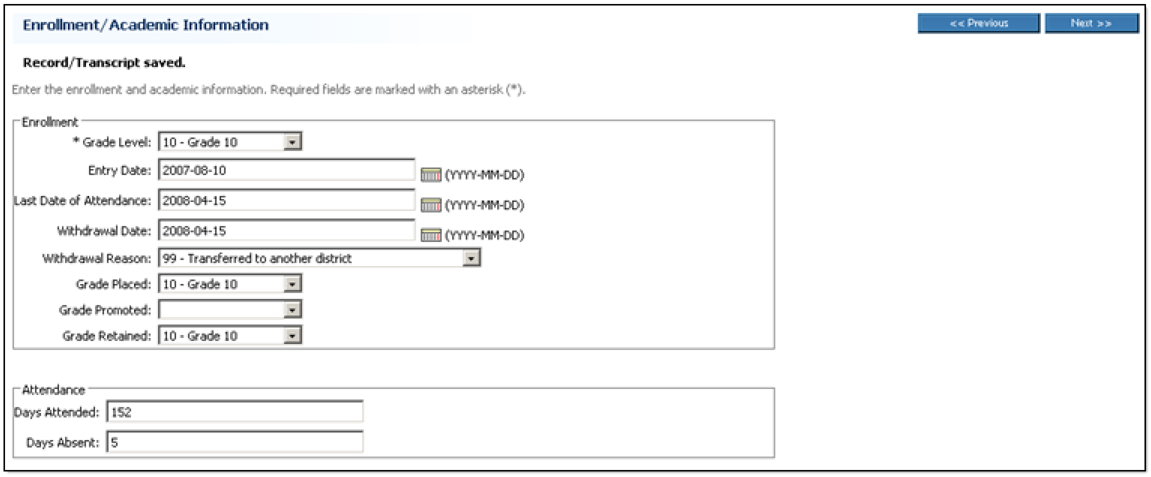
	Code	End Date	Number	Reason
○	26 - Partial day In-School Suspension	2008-05-30	1	50 - Used, exhibited, or possessed a non-illegal knife as defined by student code of conduct and as allowed under TEC 37.007. (Knife blade equal to or less than 5.5 inches.)

Add Edit Remove

Figure 72: The bottom section of the Student and School Information page specifies important supplemental information about the student.

Manual Data Entry - 2. Enrollment / Academic Information

The Enrollment/Academic Information page specifies grade level and attendance information such as start and withdrawal dates and number of days attended and absent.



Enrollment/Academic Information

Record/Transcript saved.

Enter the enrollment and academic information. Required fields are marked with an asterisk (*).

Enrollment

* Grade Level: 10 - Grade 10

Entry Date: 2007-08-10 (YYYY-MM-DD)

Last Date of Attendance: 2008-04-15 (YYYY-MM-DD)

Withdrawal Date: 2008-04-15 (YYYY-MM-DD)

Withdrawal Reason: 99 - Transferred to another district

Grade Placed: 10 - Grade 10

Grade Promoted:

Grade Retained: 10 - Grade 10

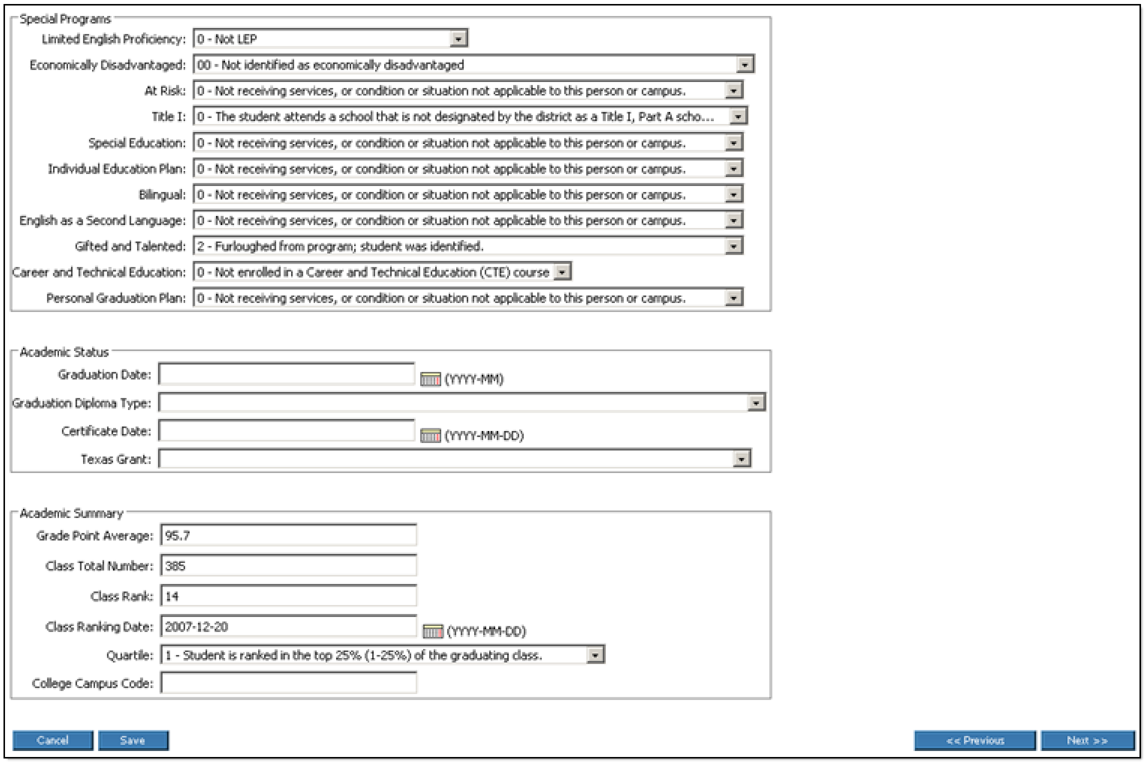
Attendance

Days Attended: 152

Days Absent: 5

Figure 73: You must enter at least a Grade Level before leaving the Enrollment/Academic Information page.

You can also specify special programs for which the student is eligible and list academic status and class ranking information.



Special Programs

Limited English Proficiency: 0 - Not LEP
Economically Disadvantaged: 00 - Not identified as economically disadvantaged
At Risk: 0 - Not receiving services, or condition or situation not applicable to this person or campus.
Title I: 0 - The student attends a school that is not designated by the district as a Title I, Part A scho...
Special Education: 0 - Not receiving services, or condition or situation not applicable to this person or campus.
Individual Education Plan: 0 - Not receiving services, or condition or situation not applicable to this person or campus.
Bilingual: 0 - Not receiving services, or condition or situation not applicable to this person or campus.
English as a Second Language: 0 - Not receiving services, or condition or situation not applicable to this person or campus.
Gifted and Talented: 2 - Furloughed from program; student was identified.
Career and Technical Education: 0 - Not enrolled in a Career and Technical Education (CTE) course
Personal Graduation Plan: 0 - Not receiving services, or condition or situation not applicable to this person or campus.

Academic Status

Graduation Date: (YYYY-MM)
Graduation Diploma Type:
Certificate Date: (YYYY-MM-DD)
Texas Grant:

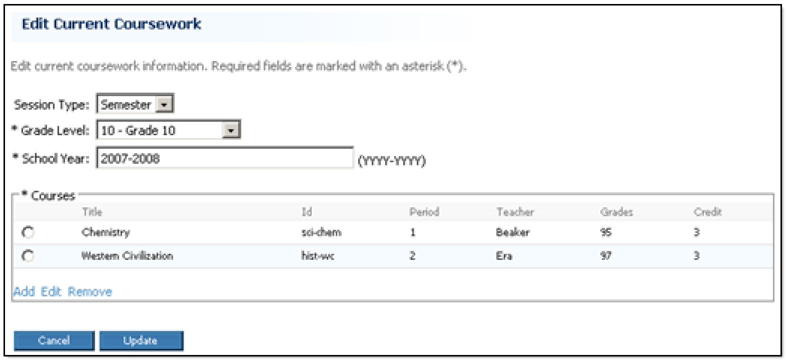
Academic Summary

Grade Point Average: 95.7
Class Total Number: 385
Class Rank: 14
Class Ranking Date: 2007-12-20 (YYYY-MM-DD)
Quartile: 1 - Student is ranked in the top 25% (1-25%) of the graduating class.
College Campus Code:

Figure 74: The Enrollment/Academic Information page collects information about special services for the student.

Manual Data Entry - 3. Current Coursework

The **Current Coursework** tab enables you to enter detailed information about the courses a student is currently taking.



Edit Current Coursework

Edit current coursework information. Required fields are marked with an asterisk (*).

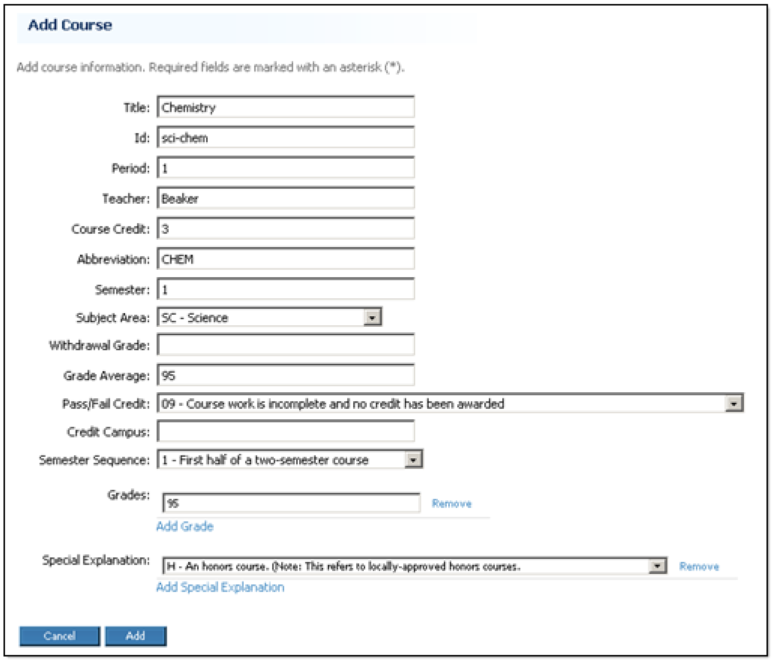
Session Type: Semester
* Grade Level: 10 - Grade 10
* School Year: 2007-2008 (YYYY-YYYY)

* Courses

	Title	Id	Period	Teacher	Grades	Credit
○	Chemistry	sci-chem	1	Beaker	95	3
○	Western Civilization	hist-wc	2	Era	97	3

Figure 75: The Current Coursework tab specifies courses in progress.

Each course is added using the **Add Course** window that enables you to specify identifying and classifying information about a specific course.



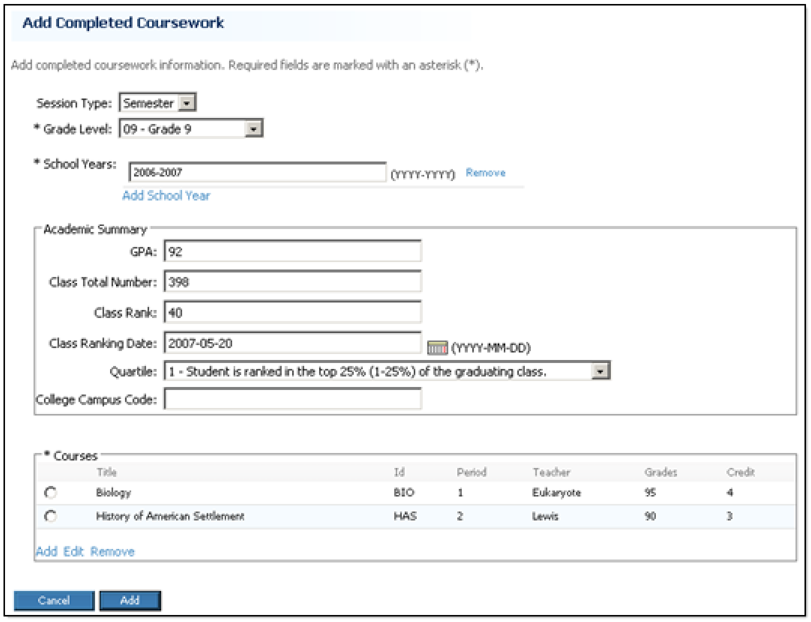
Add course information. Required fields are marked with an asterisk (*).

Title: Chemistry
Id: sci-chem
Period: 1
Teacher: Beaker
Course Credit: 3
Abbreviation: CHEM
Semester: 1
Subject Area: SC - Science
Withdrawal Grade:
Grade Average: 95
Pass/Fail Credit: 09 - Course work is incomplete and no credit has been awarded
Credit Campus:
Semester Sequence: 1 - First half of a two-semester course
Grades: 95
Special Explanation: H - An honors course. (Note: This refers to locally-approved honors courses.

Figure 76: The Add Course window specifies course details.

Manual Data Entry - 4. Completed Coursework

The **Completed Coursework** tab enables you to enter detailed information about the courses a student has finished, including class ranking information for the academic term in question.



Add completed coursework information. Required fields are marked with an asterisk (*).

Session Type: Semester
* Grade Level: 09 - Grade 9
* School Years: 2006-2007 (YYYY-YYYY)

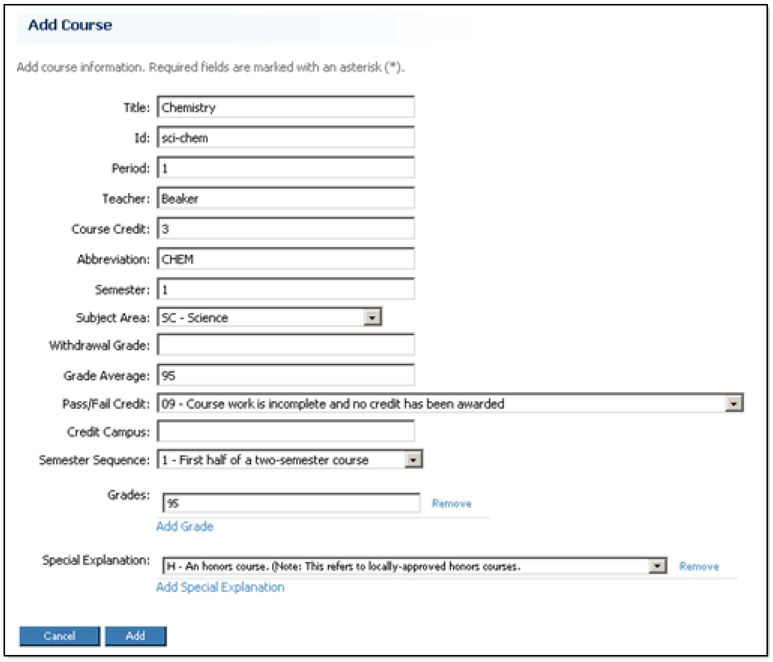
Academic Summary
GPA: 92
Class Total Number: 398
Class Rank: 40
Class Ranking Date: 2007-05-20 (YYYY-MM-DD)
Quartile: 1 - Student is ranked in the top 25% (1-25%) of the graduating class.
College Campus Code:

* Courses

	Title	Id	Period	Teacher	Grades	Credit
○	Biology	BIO	1	Eukaryote	95	4
○	History of American Settlement	HAS	2	Lewis	90	3

Figure 77: The Completed Coursework page includes Academic Summary information.

Each course is added using the **Add Course** window that enables you to specify identifying and classifying information about a specific course.



Add Course

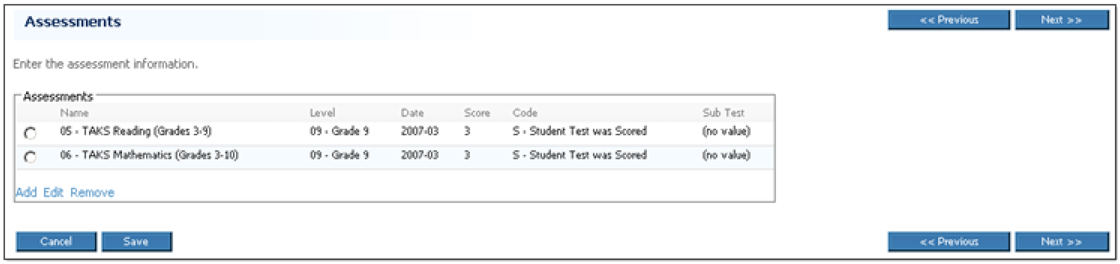
Add course information. Required fields are marked with an asterisk (*).

Title:	Chemistry
Id:	sci-chem
Period:	1
Teacher:	Beaker
Course Credit:	3
Abbreviation:	CHEM
Semester:	1
Subject Area:	SC - Science
Withdrawal Grade:	
Grade Average:	95
Pass/Fail Credit:	09 - Course work is incomplete and no credit has been awarded
Credit Campus:	
Semester Sequence:	1 - First half of a two-semester course
Grades:	95
Special Explanation:	H - An honors course. (Note: This refers to locally-approved honors courses.

Figure 78: The Add Course window specifies course details.

Manual Data Entry - 5. Assessments

The **Assessments** tab specifies academic assessments that the student has taken.



Assessments

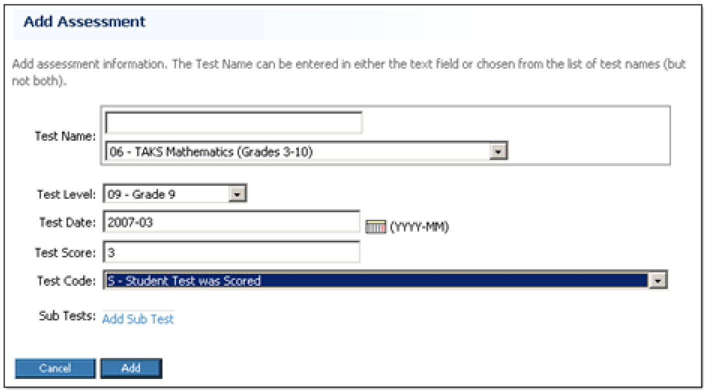
Enter the assessment information.

Assessments

	Name	Level	Date	Score	Code	Sub Test
○	05 - TAKS Reading (Grades 3-9)	09 - Grade 9	2007-03	3	S - Student Test was Scored	(no value)
○	06 - TAKS Mathematics (Grades 3-10)	09 - Grade 9	2007-03	3	S - Student Test was Scored	(no value)

Figure 79: The Assessments page lists assessments that have been entered so far.

The **Add Assessment** window enables you to add detailed information about an assessment, including information about any sub tests included in an assessment.



Add assessment information. The Test Name can be entered in either the text field or chosen from the list of test names (but not both).

Test Name: 06 - TAKS Mathematics (Grades 3-10)

Test Level: 09 - Grade 9

Test Date: 2007-03 (YYYY-MM)

Test Score: 3

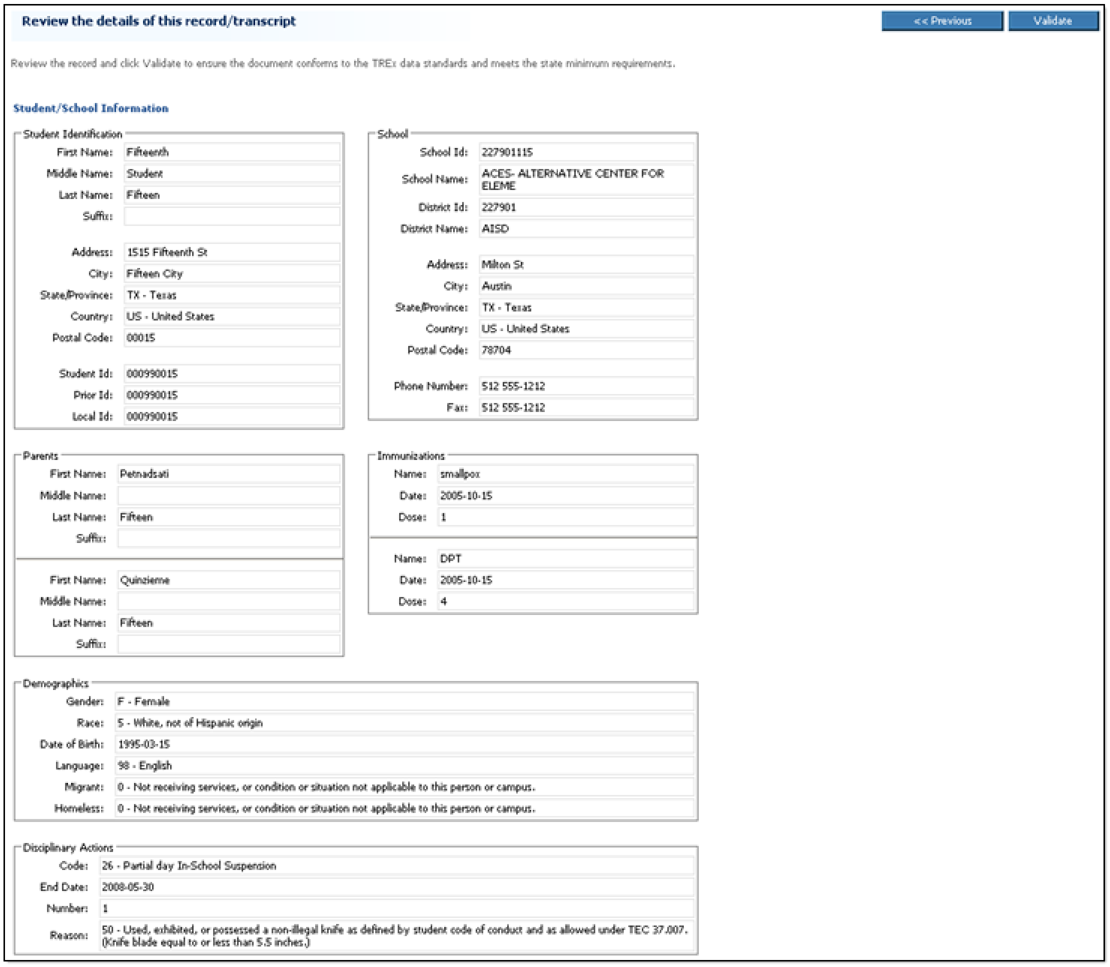
Test Code: S - Student Test was Scored

Sub Tests: Add Sub Test

Figure 80: The Add Assesments window specifies assessment details.

Manual Data Entry - 6. Validate

The **Validate** tab shows you all of the information that you have entered for the current student record. It is divided into sections that correspond to the steps of the Manual Data Entry process, starting with the **Student/School Information** section which corresponds to the **Student/School Information** tab.



Review the details of this record/transcript

Review the record and click Validate to ensure the document conforms to the TREx data standards and meets the state minimum requirements.

Student/School Information

Student Identification
First Name: Fifteenth
Middle Name: Student
Last Name: Fifteen
Suffix:

Address: 1515 Fifteenth St
City: Fifteen City
State/Province: TX - Texas
Country: US - United States
Postal Code: 00015

Student Id: 000990015
Prior Id: 000990015
Local Id: 000990015

School
School Id: 227901115
School Name: ACES- ALTERNATIVE CENTER FOR ELEME
District Id: 227901
District Name: AISD

Address: Milton St
City: Austin
State/Province: TX - Texas
Country: US - United States
Postal Code: 78704

Phone Number: 512 555-1212
Fax: 512 555-1212

Parents
First Name: Petnadsati
Middle Name:
Last Name: Fifteen
Suffix:

First Name: Quinzieme
Middle Name:
Last Name: Fifteen
Suffix:

Immunizations
Name: smallpox
Date: 2005-10-15
Dose: 1

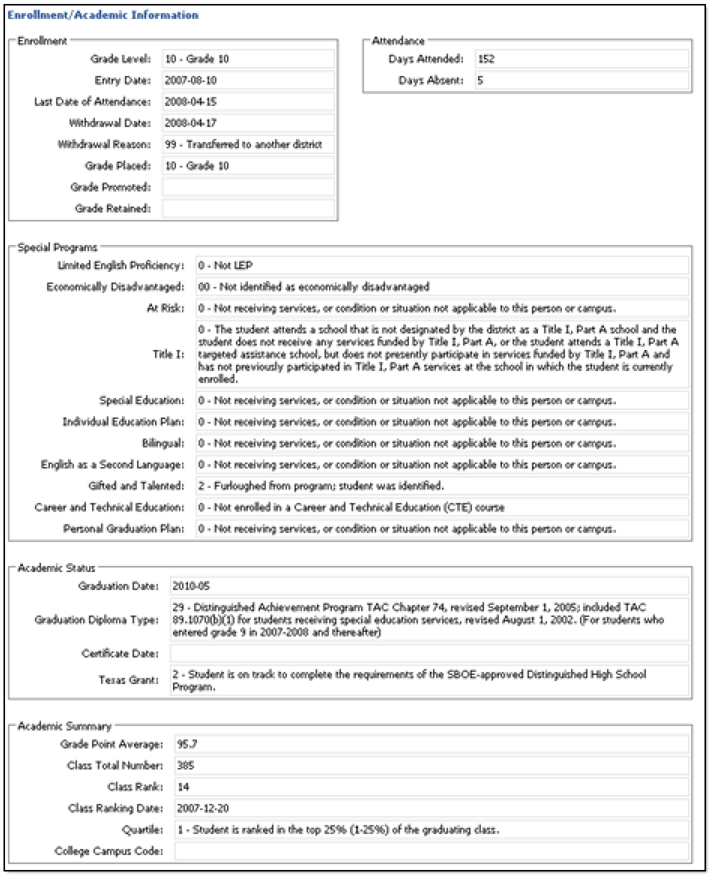
Name: DPT
Date: 2005-10-15
Dose: 4

Demographics
Gender: F - Female
Race: 5 - White, not of Hispanic origin
Date of Birth: 1995-03-15
Language: 98 - English
Migrant: 0 - Not receiving services, or condition or situation not applicable to this person or campus.
Homeless: 0 - Not receiving services, or condition or situation not applicable to this person or campus.

Disciplinary Actions
Code: 26 - Partial day In-School Suspension
End Date: 2008-05-30
Number: 1
Reason: 50 - Used, exhibited, or possessed a non-illegal knife as defined by student code of conduct and as allowed under TEC 37.007. (Knife blade equal to or less than 5.5 inches.)

Figure 81: Each section corresponds to a Manual Data Entry tab.

The **Enrollment/Academic Information** section corresponds to the **Enrollment/Academic Information** tab.



Enrollment/Academic Information

Enrollment

Grade Level: 10 - Grade 10
Entry Date: 2007-08-10
Last Date of Attendance: 2008-04-15
Withdrawal Date: 2008-04-17
Withdrawal Reason: 99 - Transferred to another district
Grade Placed: 10 - Grade 10
Grade Promoted:
Grade Retained:

Attendance

Days Attended: 152
Days Absent: 5

Special Programs

Limited English Proficiency: 0 - Not LEP
Economically Disadvantaged: 00 - Not identified as economically disadvantaged
At Risk: 0 - Not receiving services, or condition or situation not applicable to this person or campus.
Title I: 0 - The student attends a school that is not designated by the district as a Title I, Part A school and the student does not receive any services funded by Title I, Part A, or the student attends a Title I, Part A targeted assistance school, but does not presently participate in services funded by Title I, Part A and has not previously participated in Title I, Part A services at the school in which the student is currently enrolled.
Special Education: 0 - Not receiving services, or condition or situation not applicable to this person or campus.
Individual Education Plan: 0 - Not receiving services, or condition or situation not applicable to this person or campus.
Bilingual: 0 - Not receiving services, or condition or situation not applicable to this person or campus.
English as a Second Language: 0 - Not receiving services, or condition or situation not applicable to this person or campus.
Gifted and Talented: 2 - Furloughed from program; student was identified.
Career and Technical Education: 0 - Not enrolled in a Career and Technical Education (CTE) course
Personal Graduation Plan: 0 - Not receiving services, or condition or situation not applicable to this person or campus.

Academic Status

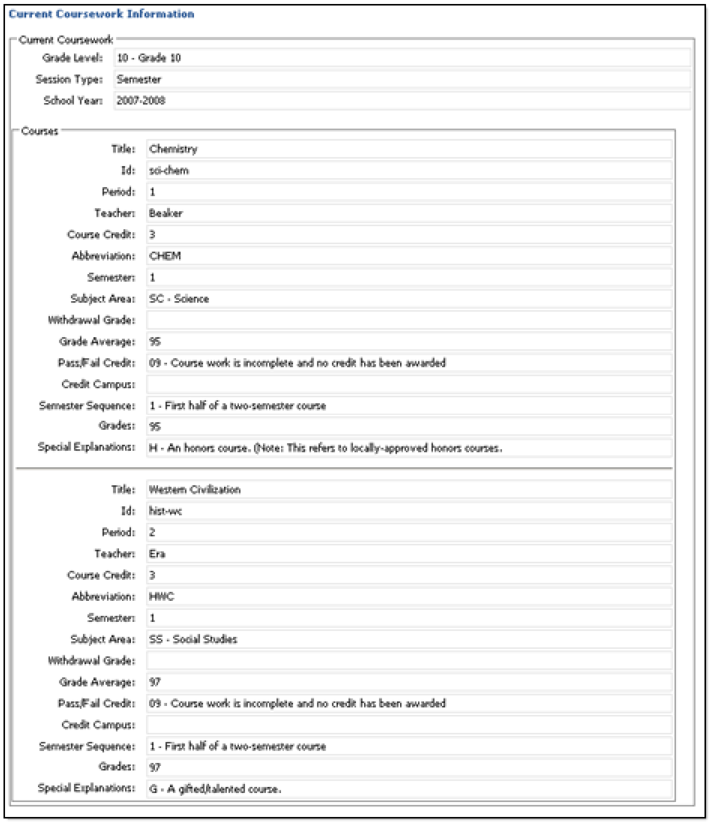
Graduation Date: 2010-05
Graduation Diploma Type: 29 - Distinguished Achievement Program TAC Chapter 74, revised September 1, 2005; included TAC 89.1070(b)(1) for students receiving special education services, revised August 1, 2002. (For students who entered grade 9 in 2007-2008 and thereafter)
Certificate Date:
Texas Grant: 2 - Student is on track to complete the requirements of the SBOE-approved Distinguished High School Program.

Academic Summary

Grade Point Average: 95.7
Class Total Number: 385
Class Rank: 14
Class Ranking Date: 2007-12-20
Quartile: 1 - Student is ranked in the top 25% (1-25%) of the graduating class.
College Campus Code:

Figure 82: If validation produces errors, you can correct them on the appropriate data entry tab.

The **Current Coursework Information** section corresponds to the **Current Coursework** tab.



Current Coursework Information

Current Coursework

Grade Level: 10 - Grade 10
Session Type: Semester
School Year: 2007-2008

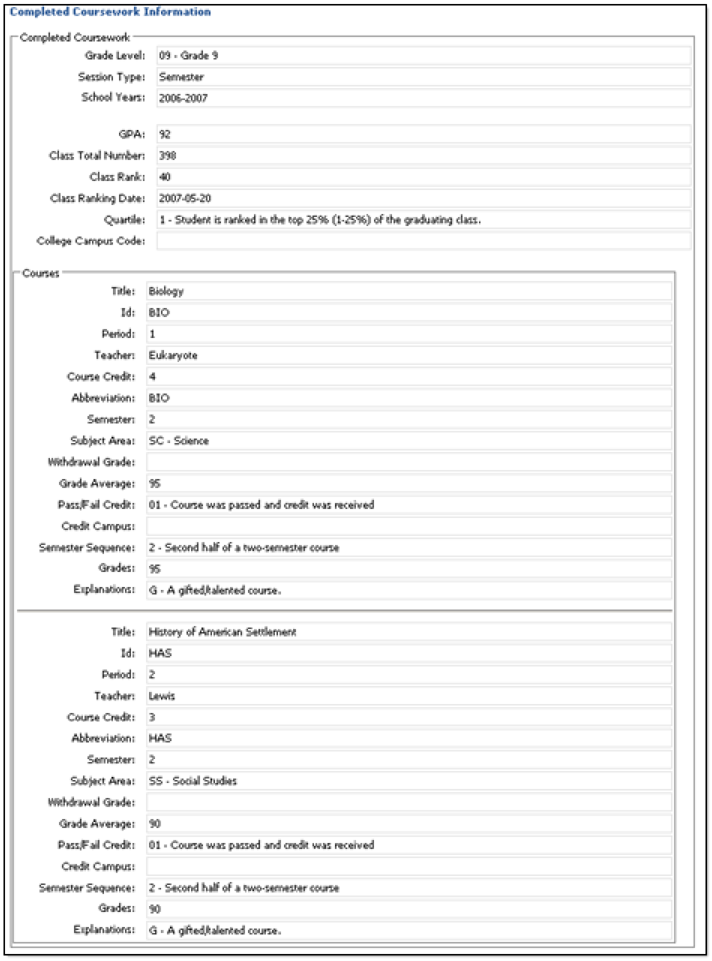
Courses

Title: Chemistry
Id: sci-chem
Period: 1
Teacher: Beaker
Course Credit: 3
Abbreviation: CHEM
Semester: 1
Subject Area: SC - Science
Withdrawal Grade:
Grade Average: 95
Pass/Fail Credit: 09 - Course work is incomplete and no credit has been awarded
Credit Campus:
Semester Sequence: 1 - First half of a two-semester course
Grades: 95
Special Explanations: H - An honors course. (Note: This refers to locally-approved honors courses.

Title: Western Civilization
Id: hist-wc
Period: 2
Teacher: Era
Course Credit: 3
Abbreviation: HWC
Semester: 1
Subject Area: SS - Social Studies
Withdrawal Grade:
Grade Average: 97
Pass/Fail Credit: 09 - Course work is incomplete and no credit has been awarded
Credit Campus:
Semester Sequence: 1 - First half of a two-semester course
Grades: 97
Special Explanations: G - A gifted/talented course.

Figure 83: You can use the Validate page to find the appropriate tab when you need to correct an error.

The **Completed Coursework Information** section corresponds to the **Completed Coursework** tab.



Completed Coursework Information

Completed Coursework

Grade Level: 09 - Grade 9
Session Type: Semester
School Years: 2006-2007

GPA: 92
Class Total Number: 398
Class Rank: 40
Class Ranking Date: 2007-05-20
Quartile: 1 - Student is ranked in the top 25% (1-25%) of the graduating class.
College Campus Code:

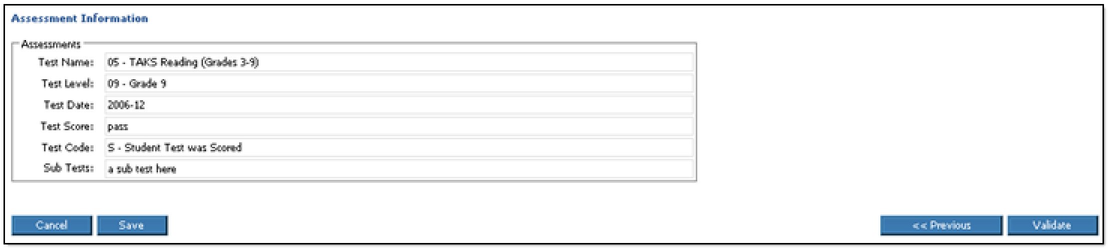
Courses

Title: Biology
Id: BIO
Period: 1
Teacher: Eukaryote
Course Credit: 4
Abbreviation: BIO
Semester: 2
Subject Area: SC - Science
Withdrawal Grade:
Grade Average: 95
Pass/Fail Credit: 01 - Course was passed and credit was received
Credit Campus:
Semester Sequence: 2 - Second half of a two-semester course
Grades: 95
Explanations: G - A gifted/talented course.

Title: History of American Settlement
Id: HAS
Period: 2
Teacher: Lewis
Course Credit: 3
Abbreviation: HAS
Semester: 2
Subject Area: SS - Social Studies
Withdrawal Grade:
Grade Average: 90
Pass/Fail Credit: 01 - Course was passed and credit was received
Credit Campus:
Semester Sequence: 2 - Second half of a two-semester course
Grades: 90
Explanations: G - A gifted/talented course.

Figure 84: All details of a tab's data, including data entered on a sub-tab is displayed on the Validate page.

The **Assessment Information** section corresponds to the **Assessments** tab.



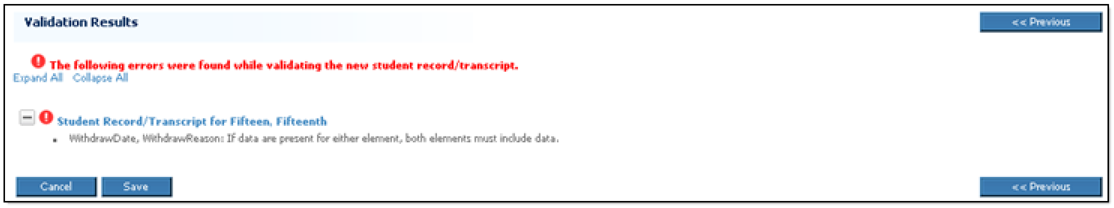
Assessment Information

Assessments

Test Name: 05 - TAKS Reading (Grades 3-9)
Test Level: 09 - Grade 9
Test Date: 2006-12
Test Score: pass
Test Code: S - Student Test was Scored
Sub Tests: a sub test here

Figure 85: It's a good idea to click Save one last time before you click Validate.

Manual Data Entry - 7. Confirm and Create/Validation Results

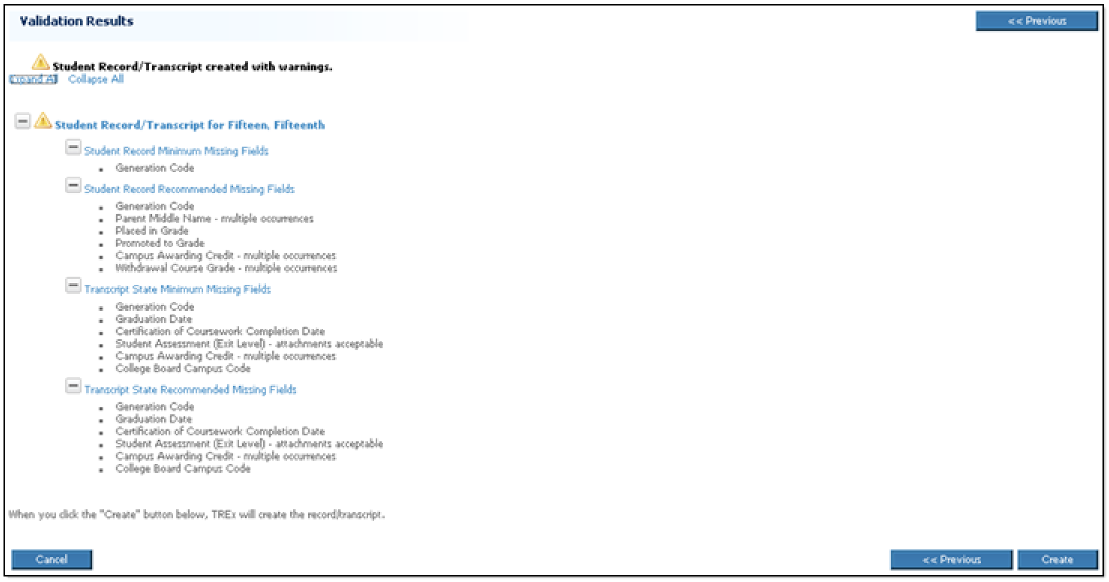


The following errors were found while validating the new student record/transcript.

Student Record/Transcript for Fifteen, Fifteenth

- WithdrawDate, WithdrawReason: If data are present for either element, both elements must include data.

Figure 86: A record cannot be sent while it has validation errors.



Student Record/Transcript created with warnings.

Student Record/Transcript for Fifteen, Fifteenth

Student Record Minimum Missing Fields

- Generation Code

Student Record Recommended Missing Fields

- Generation Code
- Parent Middle Name - multiple occurrences
- Placed in Grade
- Promoted to Grade
- Campus Awarding Credit - multiple occurrences
- Withdrawal Course Grade - multiple occurrences

Transcript State Minimum Missing Fields

- Generation Code
- Graduation Date
- Certification of Coursework Completion Date
- Student Assessment (Exit Level) - attachments acceptable
- Campus Awarding Credit - multiple occurrences
- College Board Campus Code

Transcript State Recommended Missing Fields

- Generation Code
- Graduation Date
- Certification of Coursework Completion Date
- Student Assessment (Exit Level) - attachments acceptable
- Campus Awarding Credit - multiple occurrences
- College Board Campus Code

When you click the "Create" button below, TREx will create the record/transcript.

Figure 87: Records that have only validation warnings can be sent to other institutions.

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