



Instructions for Uploading and Sending Transcripts to the CollegeforTN.org Transcript Exchange Chancery SMS

IMPORTANT NOTES:

START WITH STEP 1 ONLY IF YOU HAVE DOWNLOADED AND INSTALLED THE CHANCERY SMS EXTRACT ONTO YOUR COMPUTER. YOU SHOULD ONLY HAVE TO DOWNLOAD AND INSTALL THE EXTRACT ONCE. INSTRUCTIONS ON DOWNLOADING THE CHANCERY SMS EXTRACT ARE LOCATED ON PAGE 3. YOU MAY NEED TO WORK WITH YOUR SCHOOL'S DATA ADMINISTRATOR TO ASSIST IN INSTALLING THE EXTRACT.

IF YOU ARE UPLOADING TRANSCRIPTS ON A COMPUTER THAT IS RUNNING WINDOWS 7, PLEASE SEE THE ADDITIONAL INSTRUCTIONS ON PAGE 6.

STEP 1: Create XAP Data

- Extract transcript data from your school's student information system. Contact Troy Grant at the Tennessee Higher Education Commission (Troy.Grant@tn.gov or 615-532-0423) if you need assistance extracting transcript data.

STEP 2: Upload Transcripts to the Transcript Exchange

- Go to the XAP Counselor Center website to upload your text file at <http://counselor.XAP.com/>
- Enter your username and password and then click 'Log-on'. Contact Troy Grant if you do not have a username and password at Troy.Grant@tn.gov.
- On the Counselor Center screen, choose the 'Counselor Tools' dropdown and select 'Transcript Manager.'
- Click the 'Upload Transcripts' tab.
 - Indicate the type of transcripts (current, end of term, or final) that are being uploaded and whether or not you want to enable students to send their transcripts to their college or university of choice.
 - Click 'Browse' to locate transcript text file you just created. Once you have found the file highlight it and click 'Open.'
 - Use the 'These transcripts are from' dropdown to choose your school.
 - Next, you will find two checkboxes. The first checkbox is for a test-only upload. By clicking this box, you will NOT be uploading student information into the transcript exchange. Only click this box if you are testing the upload

process. The second checkbox will send a report to you via email with the status of your upload. This box is optional.

- Once you have located your file, click the 'Upload' button.
- At the completion of the upload, you will receive an Upload Transcript Report with information about the number of transcripts that were in the file. This is the same notice that is sent to you via email. Ensure the number of transcripts identified matches the number of transcripts uploaded to Xap Transcript Exchange.

STEP 3: Send Student Transcripts

- In the Counselor Center, click on the 'Counselor Tools' tab and the 'Transcript Manager.'

NOTE: Prior to sending an official transcript to an institution or to the Tennessee Student Assistance Corporation (TSAC), it is a good idea to review the transcript for accuracy. Click on the printer icon to the far left of a student's name to review a PDF document of the student's transcript.

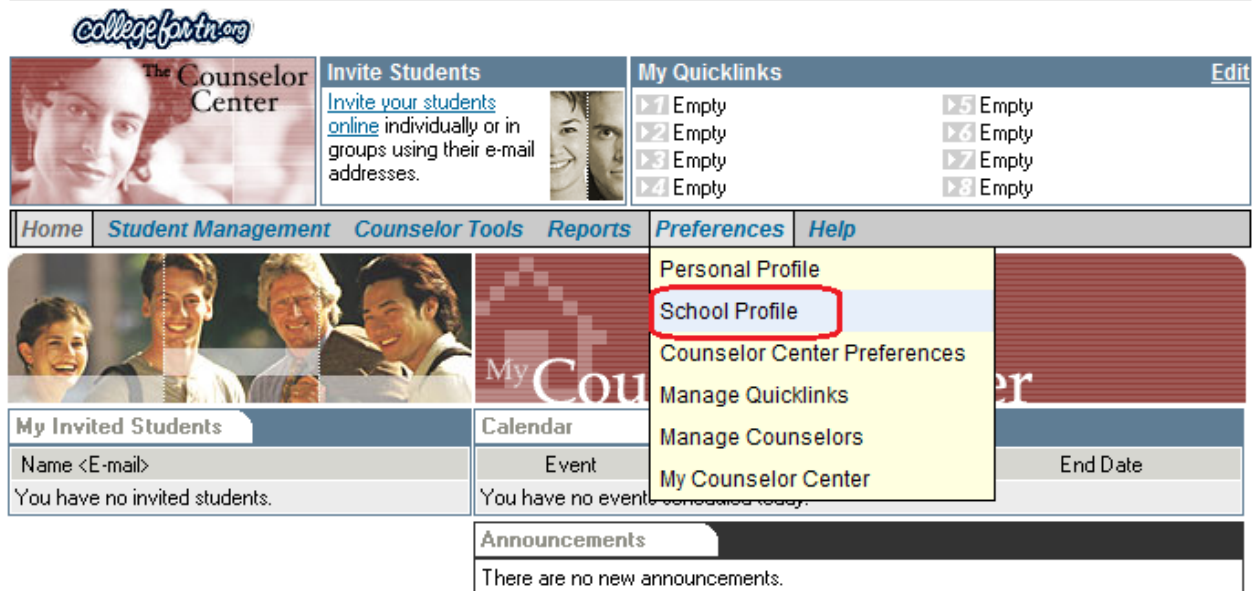
- Make sure the 'From' date range reflects the date your transcripts were uploaded (the system defaults to the current month). At the top of the screen in the 'Select transcripts to be Sent Options' section, pull down the results to select 1000 students at a time. By doing this you will be able to select and send all of your students in one screen.
- Select the student(s) you wish to send to an institution and hit the 'Next' button. You can choose one, some, or all of your students. If you are sending transcripts to TSAC, select all students.
- You will be provided with a list of destination institutions, including the Tennessee Student Assistance Corporation. Select the institution(s) you would like to send the transcript(s) to. Click 'next.'
- You will receive a confirmation screen. Click on the 'Validate' button at the bottom of the screen.
- Use the resulting page to check student GPAs prior to sending. Click the checkbox by the name of every student whose transcript you wish to send to the institution(s) you selected. Click 'submit.'
- Click the 'Finish' button. This completes the sending of your transcripts.

For assistance with uploading and sending transcripts, please contact Troy Grant (Troy.Grant@tn.gov or 615-532-0423) at the Tennessee Higher Education Commission.

For XAP support, please call 1-800-Go-To-Xap or 1-800-468-6927.

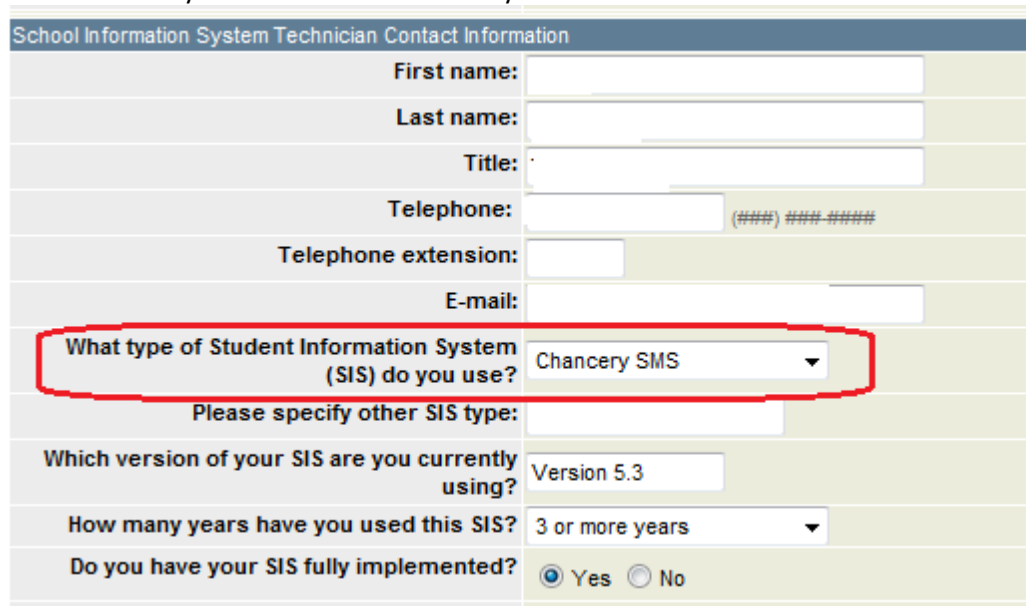
SMS Extract Installation

1. Upon logging into the Counselor Center (<https://counselor.xap.com>) go to **Preferences**
2. **School Profile**



The screenshot shows the Counselor Center interface. At the top, there's a header with the 'college for n. org' logo and a navigation bar with links: Home, Student Management, Counselor Tools, Reports, Preferences, and Help. The 'Preferences' link is highlighted. Below the navigation bar, there's a dropdown menu for 'Preferences' with options: Personal Profile, School Profile (highlighted with a red box), Counselor Center Preferences, Manage Quicklinks, Manage Counselors, and My Counselor Center. To the left of the dropdown, there's a section for 'My Invited Students' with a table showing no students. Below that, there's a 'Calendar' section with a table showing no events. At the bottom, there's an 'Announcements' section with a message: 'There are no new announcements.'

3. Confirm that your student information system is accurate

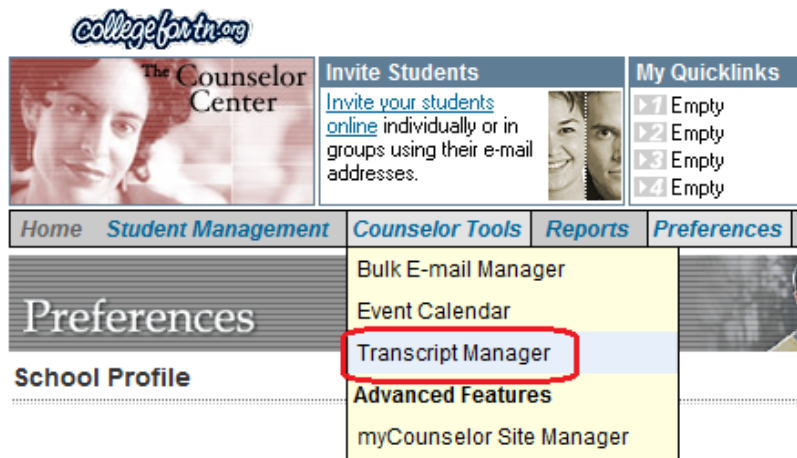


The screenshot shows the 'School Information System Technician Contact Information' form. The form has several fields: First name, Last name, Title, Telephone, Telephone extension, E-mail, What type of Student Information System (SIS) do you use? (highlighted with a red box), Please specify other SIS type, Which version of your SIS are you currently using?, How many years have you used this SIS?, and Do you have your SIS fully implemented?. The 'What type of Student Information System (SIS) do you use?' dropdown menu is currently set to 'Chancery SMS'.

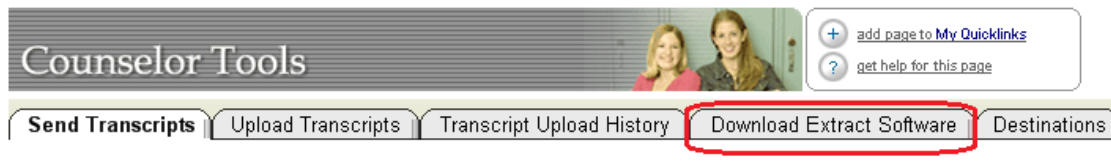
4. If you need to update your student information system, click on the drop down list
5. Select the correct SIS
6. Click "save" at the bottom of the screen

7. Go to the **Counselor Tools** menu

8. **Transcript Manager**



9. Click on the **Download Extract Software** tab

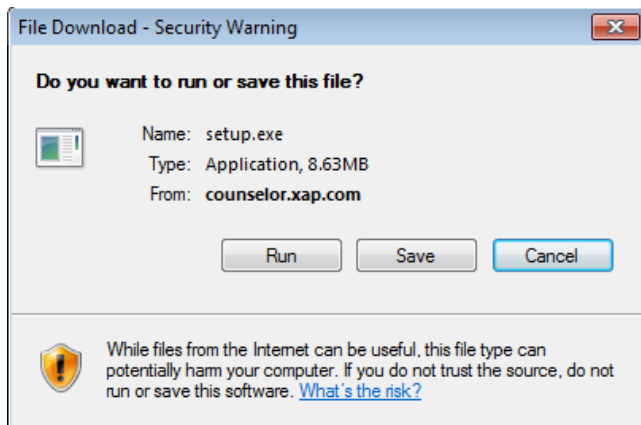


Send Uploaded Transcripts: Select Students

10. Click the **Download** button

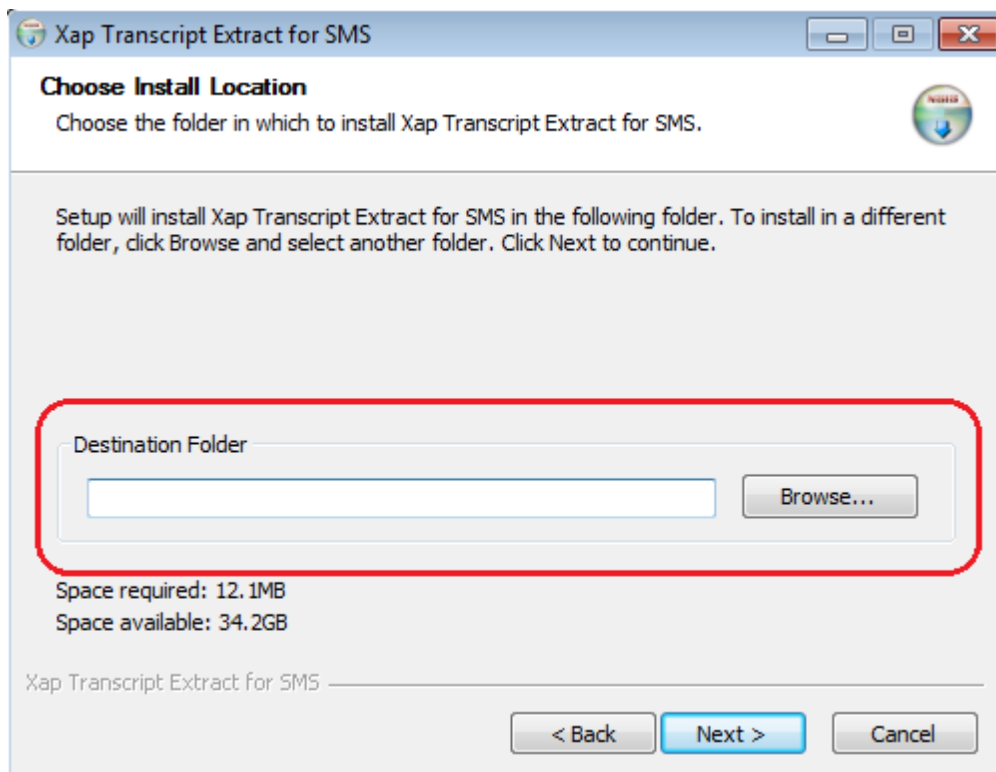


11. Choose whether you want to run or save the installation program



12. Click "Run" to begin the installation process immediately

13. In the Setup Wizard make sure to note of the Destination Folder where the program will be saved



14. The Setup Wizard will walk you through installing the software on your computer and connecting your SIS account to the extract

End of instructions.


If the individual uploading the transcripts from Chancery is using Windows 7 they must install Windows XP virtual mode onto their Windows 7 computer. The user should be able to then download and run the extract in the Windows XP virtual mode. The directions below walk you through this process. Again, **this is only applicable if your machine is upgraded to Windows 7.**

Installing and using Windows XP Mode

To use Windows XP Mode, you need to download and install Windows XP Mode, which is a fully licensed version of Windows XP with Service Pack 3. You also need to download and install Windows Virtual PC, which is the program that runs virtual operating systems on your computer.

When you install a program in Windows XP Mode, the program becomes available for use in both Windows XP Mode and Windows 7.

To download and install Windows XP Mode


1. Go to the [Windows XP Mode and Windows Virtual PC](http://www.microsoft.com/windows/virtual-pc/) website (<http://www.microsoft.com/windows/virtual-pc/>), and then click Get Windows XP Mode and Windows Virtual PC now.
2. Under Select your edition of Windows 7 and desired language for installation, click the Select system drop-down list, and then click the edition of Windows 7 you're currently running.
 - o To find out which edition of Windows 7 you're running, click the Start button , right-click Computer, and then click Properties. The edition of Windows 7 you're running is listed under Windows edition (and 32-bit and 64-bit information appears under System, next to System type).
3. Click the Select language drop-down list, and then click the language you want to use.
4. Under Download and install Windows XP Mode, in step 2, under Windows XP Mode, click Download.
5. To install Windows XP Mode immediately, click Open or Run, and then follow the instructions on your screen. To install Windows XP Mode later, click Save and download the installation file to your computer. When you're ready to install Windows XP Mode, double-click the file.

We recommend clicking Save and keeping the file on your computer in case you ever need to reinstall Windows XP Mode.


6. In the Welcome to Setup for Windows XP Mode dialog box, click Next.

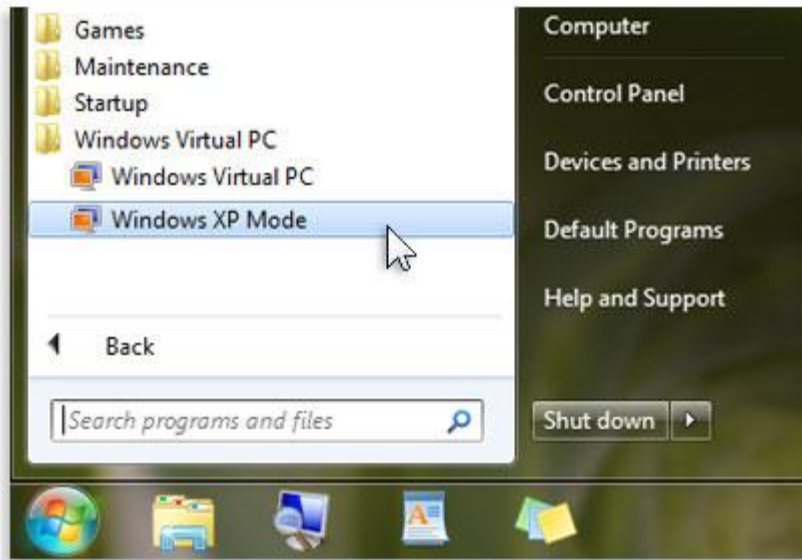
7. Choose the location for the virtual hard disk file that Windows XP Mode uses, or accept the default location, and then click Next.
8. On the Setup Completed screen, click Finish.

To download and install Windows Virtual PC

1. Go to the [Windows XP Mode and Windows Virtual PC](#) website, and then click Get Windows XP Mode and Windows Virtual PC now.
2. Under Select your edition of Windows 7 and desired language for installation, click the Select system drop-down list, and then click the edition of Windows 7 you're currently running.
 - To find out which edition of Windows 7 you're running, click the Start button , right-click Computer, and then click Properties. The edition of Windows 7 you're running is listed under Windows edition (and 32-bit and 64-bit information appears under System, next to System type).
3. Click the Select language drop-down list, and then click the language you want to use.
4. Under Download and install Windows XP Mode, in step 3, under Windows Virtual PC, click Download.
5. To install Windows Virtual PC immediately, click Open or Run, and then follow the instructions on your screen. To install Windows Virtual PC later, click Save and download the installation file to your computer. When you're ready to install Windows Virtual PC, double-click the file.
6. Click Yes to install Update for Windows (KB958559).
7. If you accept the license terms, click I Accept.
8. After installation is complete, click Restart Now to restart your computer.

To set up Windows XP Mode for first use

1. Click the Start button , click All Programs, click Windows Virtual PC, and then click Windows XP Mode.



Windows Virtual PC and

Windows XP in the list of programs

2. If you accept the license terms, click I accept the license terms, and then click Next.
3. On the Installation folder and credentials page, accept the default location where Windows XP Mode files will be stored, or choose a new location.
4. Type a password, type it again to confirm it, and then click Next.
5. On the Help protect your computer page, decide whether you want to help protect your computer by turning on automatic updates, and then click Next.
6. Click Start Setup.


After setup is complete, Windows XP Mode opens in a separate window.

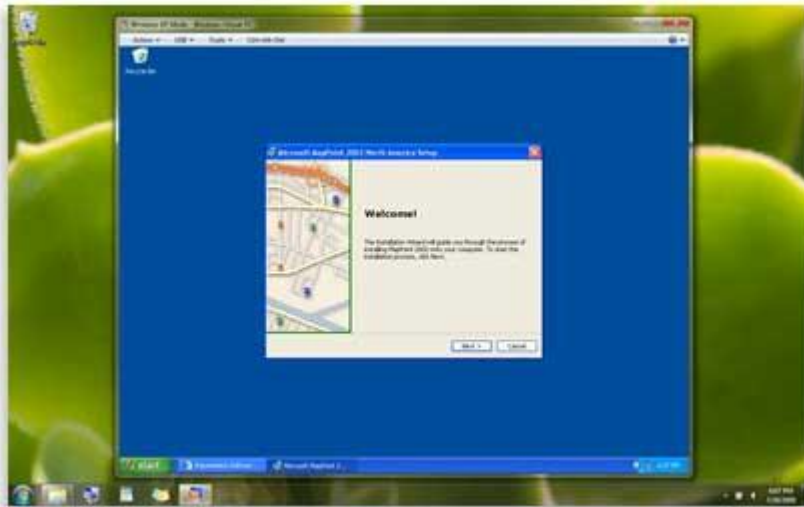
To install and use a program in Windows XP Mode



Note



Antivirus software isn't included with Windows XP Mode. Even if your computer running Windows 7 already has antivirus software, you should also install antivirus software in Windows XP Mode to help defend your computer against viruses.

1. In Windows 7, click the Start button , click All Programs, click Windows Virtual PC, and then click Windows XP Mode.
2. In Windows XP Mode, insert the program's installation disc into your computer's CD/DVD drive; or browse to the program's installation file, open the file, and follow the instructions to install the program.



Installing a program in

Windows XP Mode

3. Click the Close button  at the top of the Windows XP Mode window.
4. In Windows 7, click the Start button , click Windows Virtual PC, click Windows XP Mode Applications, and then click the program you want to open.



Note

If the Windows XP Mode window is open when you try opening a program in Windows XP Mode from Windows 7, you'll be prompted to close the virtual machine. Be sure to save any data you want to keep in Windows XP Mode before closing it.