



AD TS 130 Inbound Electronic Transcripts Setup Guide v. 8.0

Last Revised: 11/04/02

DRAFT

REVISION CONTROL

Document Title: AD TS 130 Inbound Electronic Transcripts Setup Guide
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File Reference: AD TS 130 Inbound Transcripts Setup Guide-v80-11042002.doc

Date	By	Action	Pages
10/20/2002	David Cartwright	New Document	All
10/24/2002	David Cartwright	Revisions based on peer review	All
11/4/2002	Linda Horan	Minor cleanup	All

Review/Approval History

Date	By	Action	Pages

This document is published as a baseline guide. Panel shots may reflect campus specific information, provided as examples only. Any questions concerning this document should be addressed to the CMS/SOSS Student Administration team.

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1.0 TS 130 Electronic Transcript Setup

The California State University receives applications from thousands of transfer students every year. Entering transcript data manually for admission and transfer credit evaluation would be a time consuming and error-prone process. To facilitate the transfer process, the CSU is using a combination of delivered PeopleSoft functionality and a custom SQR to load electronic transcripts in the ANSI X12 TS130 format into a campus database for use by PeopleSoft applications.

PeopleSoft provides the capability for institutions to load transcript data into the Education component using records in the PeopleSoft Business Document format. Transcripts received from community colleges and other institutions are generally in some form of ANSI X12 Transaction Set 130 format. The CSU implementation assumes “vanilla” TS 130 such as that delivered by the UT Austin EDI server.

For additional information on ANSI X.12 Transaction Set 130, please refer to the *Guide to the Implementation of Electronic Transcripts and Student Records Version 4 (April, 1998)*. The guide may be accessed and downloaded from the Postsecondary Electronic Standards Council at the following site:

<http://www.standardscouncil.org/index.asp?goto=taptech&sub=tsuite>

This guide will be very helpful in understanding and setting up the required data conversion profiles.

1.1 External Organizations

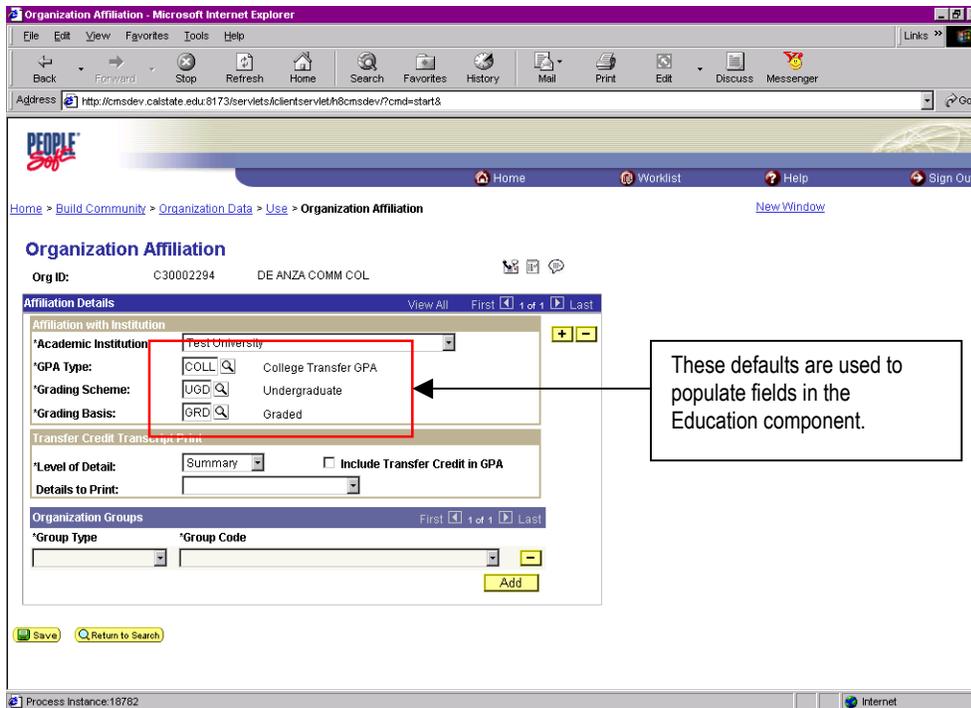
In order to receive and process data from a sending institution, that institution must be set up as a school in the external organization table. To properly process EDI transcripts, the external organization’s *School Data* must be complete as in the example below. The **School Codes** are used for the PeopleSoft Organization Search/Match process, and the **System Default Values** are used to populate default information about the school when data is loaded into PeopleSoft.

The screenshot shows the PeopleSoft Organization Table setup page for the organization DE ANZA COMM COL (Org ID: C30002294). The page is displayed in a Microsoft Internet Explorer browser window. The main content area is titled "Organization Details" and includes the following sections:

- Organization Details:** Effective Date: 10/21/2002, Status: Active, Mapping Values.
- School Characteristics:** Accredited (checked), Transcript Translation (unchecked), School Type: CC.
- School Codes:** ATP: 4286, FICE: 004480, ACT: 0253, IPEDS: (empty).
- System Default Values:** Career: Undergrad, Term Type: Quarter, Unit Type: Quarter.
- Catalog Information:** School District: (empty), Shared Catalog (unchecked), Catalog Org: (empty), School Code: (empty).

At the bottom of the form, there are buttons for Save, Return to Search, Add, Update/Refresh, Include History, and Correct History. The page also includes navigation links for Organization Table, Primary Contact and Dept., School Data, and Vendor Information.

Additional processing defaults are defined on the *Organization Affiliation* page:



1.2 TS 130 and Transfer Credit Processing

The TS 130 EDI process loads data into the delivered PeopleSoft Education component for use in application review as well as for transfer credit processing. This interdependence requires that at least a minimal amount of transfer credit processing needs to be set up before EDI can be implemented. At a minimum, the following tables must be set up:

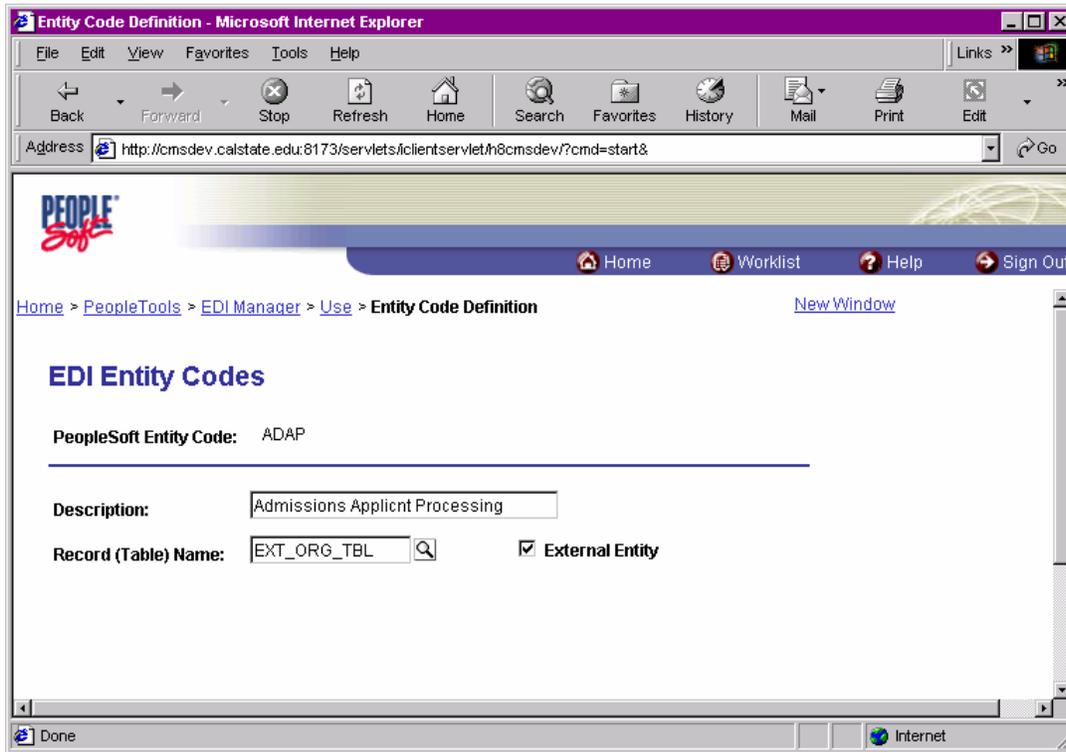
- External Organization
- External Term Table
- External Subject Table
- School Subject Table
- School Course Classification

For details on setting up transfer credit, refer to the *Transfer Credit Setup Guide*.

2.0 Setting Up Trading Partners

2.1 Entity Code Definition

Navigation: **Home → PeopleTools → EDI Manager → Use → Entity Code Definition**



2.1.1 Considerations

The EDI Entity Codes page is used to specify entity codes for processing and designate the record/table name to validate against for each type of entity (the prompt table for that code). Three entity codes are delivered for admissions processing:

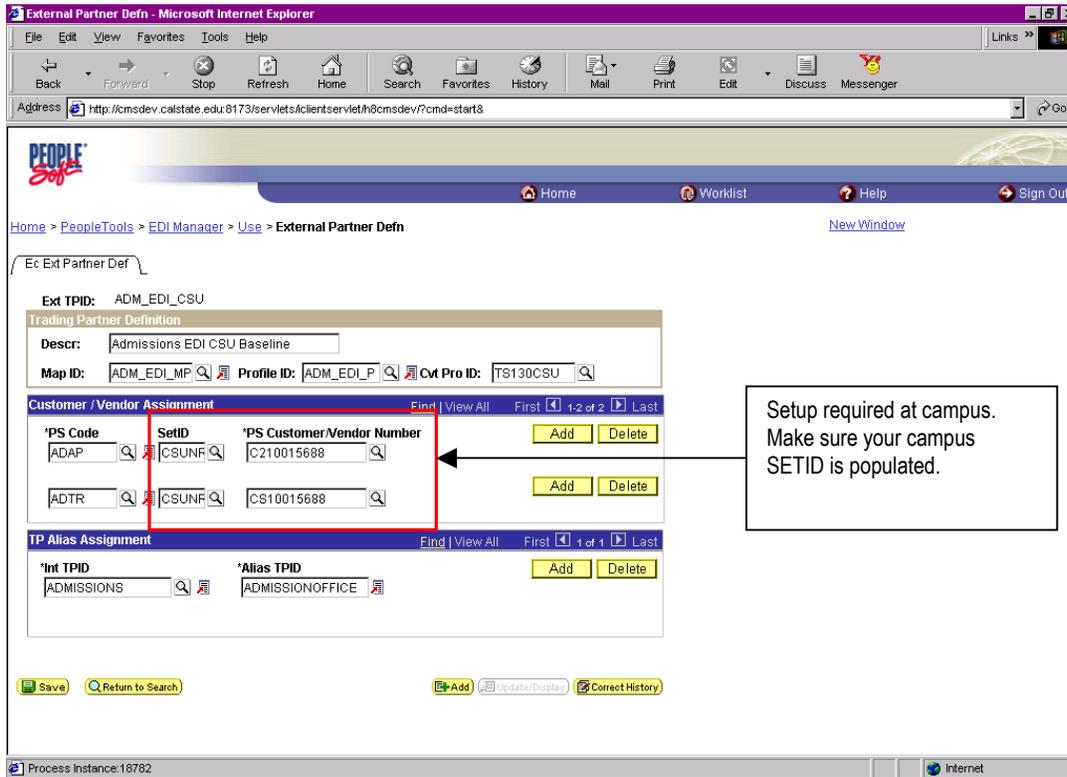
Code	Record
ADAP	PS_EXT_ORG_TBL
ADST	PS_BU_COMPANY_TBL
ADTR	PS_EXT_ORG_TBL

2.1.2 Recommendations

The delivered codes are sufficient for processing needs and do not need to be altered.

2.2 External Trading Partner ID

Navigation: **Home → PeopleTools → EDI Manager → Use → External Partner Defn**



2.2.1 Considerations

The external trading partner definition defines the external trading partner for EDI processing. In the context of CMS, only one external trading partner has been defined and is delivered with the CSU customization, ADM_EDI_CSU. This is because all EDI TS 130 data are processed through the custom CSU process to convert the received data into the PeopleSoft Business Document Format for further processing. This saves additional setup by requiring only one set of conversion routines and data mapping tables for loading the data into the staging tables

2.2.2 Recommendations

It is not necessary to set up additional external trading partners for the institutions from which you receive transcripts as long as the format is compatible with the “pure” TS 130 used by the CSU custom process.

NOTE: This page needs to be modified to use the SetID for your campus before using the system.

2.3 Internal Partner Definition

Navigation: **Home → PeopleTools → EDI Manager → Use → Internal Partner Defn**

Internal Partner Defn - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Back Forward Stop Refresh Home Search Favorites History Mail Print Edit Discuss Messenger

Address http://cmsdev.calstate.edu:8173/servlets/clientServlet.h8cmsdev?cmd=start&

PEOPLE Soft

Home Worklist Help Sign Out

Home > PeopleTools > EDI Manager > Use > Internal Partner Defn [New Window](#)

Ec Int Partner Defn

Int TPID: ADMISSIONS

Descr: Admissions Office

Business Unit Assignment Find | View All First 1 of 1 Last

PS Code	Unit	Add	Delete
UNIV	CSUNF		

TP ID Alias Definition Find | View All First 1 of 1 Last

Ext TPID	Alias TPID	Add	Delete
ADM_EDI_CSU	ADMISSIONOFFICE		

Save Return to Search Add Update/Display Correct History

Done Internet

Make sure that your campus SETID is selected

2.3.1 Considerations

This page is used to set up internal trading partners at the campus. TS 130 functionality in the CMS context requires only one internal trading partner be set up. The internal trading partner ID of ADMISSIONS needs to be set up.

- PS Code is UNIV
- Unit is the campus business unit for Admissions
- External Trading Partner ID is ADM_EDI_CSU
- The Alias TPID is ADMISSIONOFFICE. This ID is hard coded in some delivered programs and should not be changed.

2.3.2 Recommendations

PeopleSoft delivers an additional External Trading Partner ID, ADM_EDI_STX. This is a generic version and should not be used. The external trading partner ADM_EDI_CSU is included as part of CMS Baseline and is designed to work with the Baseline modification.

3.0 Data Mapping and Conversion Profiles

Navigation: [Home](#) → [PeopleTools](#) → [EDI Manager](#) → [Use](#) → [Conversion Data Profile](#)

Conversion Data Profile - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Back Forward Stop Refresh Home Search Favorites History Mail Print Edit Discuss Messenger

Address http://cmsdev.calstate.edu:8173/servlets/clientervlet/h8cmsdev?cmd=start&

Home Worklist Help Sign Out

Home > PeopleTools > EDI Manager > Use > Conversion Data Profile

Conversion Data Profile

Cvt Pro ID: TS130CSU

Description: CSU TS 130 Conversion Profile Source Profile:

View All First 5 of 18 Last Add Delete

*Cvt TypID: DEGREE TS130 Transcript Degree Setid Based

No-Value Pass Thru Default Value:

Conversion Values Find | View All First 1-3 of 15 Last

Internal Value	Int Deflt	External Value:	Ext Deflt
AA	<input checked="" type="checkbox"/>	2.3	<input checked="" type="checkbox"/>
AS	<input checked="" type="checkbox"/>	2.3	<input type="checkbox"/>
BA	<input checked="" type="checkbox"/>	2.4	<input checked="" type="checkbox"/>

Save Return to Search Add Update/Display

3.1.1 Considerations

EDI records are received using a standard set of codes defined either in the Postsecondary Education Standards Council's *Guide to the Implementation of Electronic Transcripts and Student Records Version 4* (in this context, fields such as ethnic group or address type), or by mutual agreement between trading partners (fields such as external subject area).

Each type of EDI transaction has a *Data Conversion Profile* associated with it to define code translations that need to take place in the data loading process. The Data Conversion Profile **TS130CSU** is provided as part of CMS Baseline and predefines data conversions required systemwide. The remaining conversions must be set up at the campus level.

This page has two scroll levels within it. The parent record (level 0) is the Conversion Type ID (*CvtTypeID*), and the child records (level 1) are each internal/external pair of values. For the level 1 records, the following definitions apply:

- Internal Value – The PeopleSoft value to which the data must be converted for further use in the system.

- Internal Default Checkbox – This is used in a situation where one internal value may translate to multiple external values. This checkbox indicates which external value the internal value should default to on **outbound** TS 130¹.
- External Value – This is either a standard code from the *Guide to the Implementation of Electronic Transcripts*, or a mutually agreed upon code between trading partners.
- External Default Checkbox - This is used in a situation where one external value may translate to multiple internal values. This checkbox indicates which internal value the external value should default to on **inbound** TS 130.

3.1.2 Recommendations

Significant care needs to be taken in setting up these data conversions, or data will not load properly into the PeopleSoft staging tables. This is crucial since much of the data entry on this table is not validated and errors on this page could result in inaccurate data being loaded into your system.

The following table lists all of the conversions defined in TS130CSU, along with whether the table is populated with values delivered by either PeopleSoft or CMS. The *Campus Setup Required* column indicates whether the table is complete (*No* setup required), if additional campus codes may be required (*Review*), or whether this is primarily a campus setup (*Yes*, campus setup is required). The prompt table for the translation is also indicated.

NOTE: Not all conversions have prompt tables associated with the internal values. Those designated with Xlat in the *Prompt Table* column use translate values and no prompt table is used. In all cases, the external values must be entered by hand.

Cvt TypeID	Description	Delivered	Campus Setup Required	Prompt Table
ACAD_LEVEL	EDI TS130/TS189 Academic Level	Yes	No	Xlat
ADDR_TYPE	EDI Address Type Conversion	Yes	Review	Xlat
CITZEN_STAT	EDI TS130/TS189 Citizenshp Stat	Yes	No	Xlat
CRSE_LEVEL	EDI TS130/TS189 Course Level	Yes	Review	Xlat
DEGREE	TS130 Transcript Degree	Sample Only	Yes	DEGREE_TBL
ETHNIC_GRP	EDI TS130/TS189 Ethnic Group	Yes	No	Xlat
EXT_CAREER	EDI TS130/TS189 Ext Career	Yes	Review	Xlat
EXT_SUBJ	EDI TS130/TS189 Ext Subj Area	Sample Only	Yes	EXT_SUBJECT_TBL
EXT_TERM	EDI TS130/TS189 External Term	Yes	Review	Xlat
GRADE_BAS	EDI TS130/TS189 Grade Basis	Sample Only	Yes	Xlat

¹ Although outbound EDI is not supported at this time, the internal default checkbox is enforced for data integrity.

Cvt TypeID	Description	Delivered	Campus Setup Required	Prompt Table
HONORS_CAT	EDI TS130/TS189 Honors Cat	Sample Only	Yes	
MAR_STATUS	EDI TS130/TS189 Martial Status	Yes	No	Xlat
NAME_PART	EDI TS130/TS189 Name Component	Yes	No	Xlat
TERM_TYPE	EDI TS130/TS189 Term Type	Yes	Review based on trading partner agreements	Xlat
TEST	Student Test Id	Sample Only	Yes, if test data is anticipated on transcripts	SA_TEST_TBL
TEST_CMP	Student Test Component	Sample Only	Yes, if test data is anticipated on transcripts	SA_TEST_CMP_TBL
TSCRT_STAT	EDI TS130/TS189 Transcript Stat	Yes	Review	Xlat
UNIT_TYPE	EDI TS130/TS189 Unit Type	Yes	Review	Xlat

If your campus anticipates receiving blanks for certain segments in your EDI and you wish to make assumptions in the data conversion, you can define a blank value for the external value and equate it to an internal default as shown below.

If the target field for the data in PeopleSoft allows blanks, the *External Value* of blank can be associated with a blank *Internal Value* as well..

