

Texas Records Exchange (TREx): An Introduction to the System

for

Education Service Centers

Project Background

About TREx

The Texas Records Exchange (TREx) system is a web-based software application designed for the exchange of electronic student records as mandated by the 79th Legislature, 3rd Called Session, 2006 (House Bill 1).

TREx Purpose

School registrars can electronically request and receive student records for students who have attended or will be attending Texas public schools.

High school registrars can electronically create and send official student transcripts to Texas public colleges and universities using TREx to access the University of Texas (UT) SPEEDE server.

TREx Objectives

Provide quick and cost-effective method for sending and receiving student records and transcripts

Facilitates response within 10 day required time frame

TEASE log-in and electronic encryption of data protects student information (data only transferred via TREx – it is housed at district/school site)

Minimal software and hardware requirements

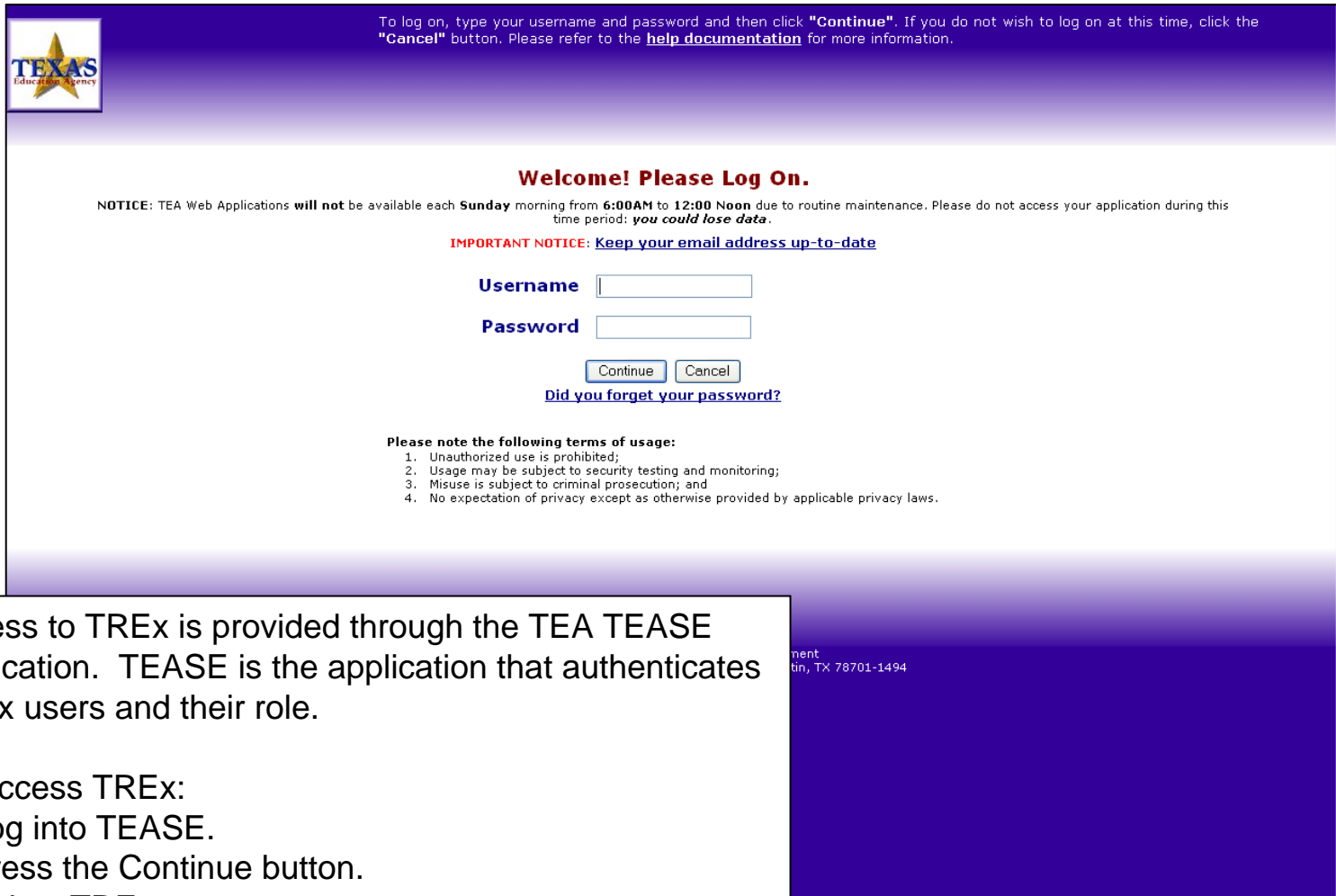
Six Primary Functions

How to...

1. Look up a student
2. Request a record/transcript
3. Track a transaction
4. Send a record/transcript
5. Receive a record/transcript
6. Upload, create, and manage data files

How to use TReX

TEASE Login



To log on, type your username and password and then click "**Continue**". If you do not wish to log on at this time, click the "**Cancel**" button. Please refer to the [help documentation](#) for more information.

Welcome! Please Log On.

NOTICE: TEA Web Applications **will not** be available each **Sunday** morning from **6:00AM** to **12:00 Noon** due to routine maintenance. Please do not access your application during this time period: **you could lose data**.

IMPORTANT NOTICE: [Keep your email address up-to-date](#)

Username

Password

[Did you forget your password?](#)

Please note the following terms of usage:

1. Unauthorized use is prohibited;
2. Usage may be subject to security testing and monitoring;
3. Misuse is subject to criminal prosecution; and
4. No expectation of privacy except as otherwise provided by applicable privacy laws.

ment
tin, TX 78701-1494

Access to TREx is provided through the TEA TEASE application. TEASE is the application that authenticates TREx users and their role.

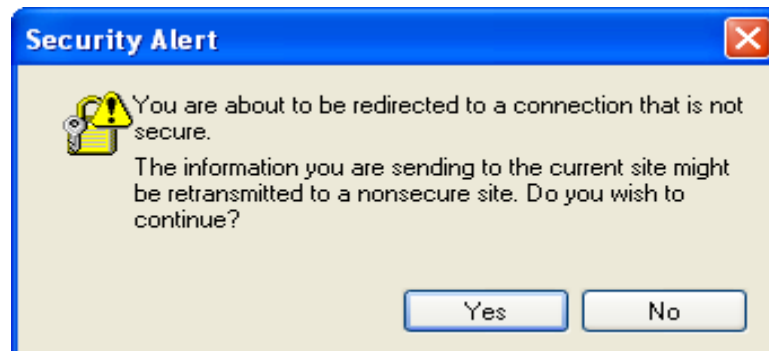
To access TREx:

1. Log into TEASE.
2. Press the Continue button.
3. Select TREx.


Security Alert

The following Security Alert warning message appears.

Select the Yes button.



TREx Home Page





**TREx**
Texas Records Exchange System

Campus Registrar Trex | PEARCE H S Campus | Logout




First Name Last Name or Tracking #

Need Help?

Items Requiring Attention

	0	Inbound Requests
	1	Inbound Records/Transcripts
	0	Rejected Outbound Requests
	0	Rejected Outbound Records/Transcripts






Top 10 Record/Transcript Destinations

Recipient	%	Total
 AUSTIN H S (AUSTIN ISD)	33.3	2
 BERKNER H S (RICHARDSON ISD)	33.3	2
 TRAVIS H S (AUSTIN ISD)	33.3	2




As a new TREx user, no records transfer history, pending or sent requests, and reports will appear yet.






Records/Transcripts

-  Send one record/transcript
-  Send multiple records/transcripts
-  View pending outbound records/transcripts (0)
-  Manage records/transcripts
-  View completed transactions



Requests

-  Request a record/transcript
-  View pending outbound requests (1)

Reporting

-  Top 10 record/transcript sources
-  Top 10 record/transcript destinations
-  Top 10 request sources
-  Top 10 request destinations
-  Campus Activity Summary

Administration

-  Upload record/transcript legend
-  View record/transcript legend
-  Remove record/transcript legend

TREx Home Page - Navigation

The screenshot shows the TREx Home Page with the following elements:

- Header:** TREx Texas Records Exchange System logo, Campus Registrar TReX | PEARCE H S Campus | Logout, and search fields for First Name, Last Name, and Tracking #.
- Items Requiring Attention:** A section with a red circle and an arrow pointing to it. It contains a table with the following items:

Icon	Count	Link
Inbound Request icon	0	Inbound Requests
Inbound Records/Transcripts icon	1	Inbound Records/Transcripts
Rejected Outbound Requests icon	0	Rejected Outbound Requests
Rejected Outbound Records/Transcripts icon	0	Rejected Outbound Records/Transcripts
- Records/Transcripts:** A section with links: Send one record/transcript, Send multiple records/transcripts, View pending outbound records/transcripts (0), Manage records/transcripts, and View completed transactions.
- Requests:** A section with links: request a record/transcript, view pending outbound requests (1), and a list of links for record/transcript sources and destinations.
- Registration:** A section with links: upload record/transcript legend, view record/transcript legend, and remove record/transcript legend.

Section: *Items Requiring Attention*:

- “Inbound Request” is the link to access requests that have been sent to your campus.
- “Inbound Records/Transcripts” is the link to access records/transcripts sent to your campus.
- “Rejected Outbound Requests” is the link to access requests that you generated, but were rejected.
- “Rejected Outbound Records/Transcripts” is the link to access records/transcripts that you generated, but were rejected.

“Refresh” button reloads the homepage to see if any new items might have arrived since you logged in

TREx Home Page - Navigation

The screenshot shows the TREx Home Page with the following elements:

- Header:** TREx Texas Records Exchange System logo, Campus Registrar Trex | PEARCE H S Campus | Logout, and search fields for First Name, Last Name, and Tracking #.
- Items Requiring Attention:** A section with three items: 0 Inbound Requests, 1 Inbound Records/Transcripts, and 0 Rejected Outbound Requests.
- Records/Transcripts:** A section with five links: Send one record/transcript, Send multiple records/transcripts, View pending outbound records/transcripts (0), Manage records/transcripts, and View completed transactions. This section is circled in red and pointed to by an arrow.
- Requests:** A section with two links: Request a record/transcript and View pending outbound requests (1).
- Reporting:** A section with five links: Top 10 record/transcript sources, Top 10 record/transcript destinations, Top 10 request sources, Top 10 request destinations, and Campus Activity Summary.
- Administration:** A section with three links: Upload record/transcript legend, View record/transcript legend, and Remove record/transcript legend.

Section: *Records/Transcripts*:

- “Send one record/transcript” is the link to begin the process for sending a student record/transcript.
- “Send multiple records” allows you to begin the process for sending multiple student records/transcripts.
- “View pending outbound records/transcripts” allows you to check the status of records/transcripts that were sent from you.
- “Manage records/transcripts” allows you to manage records/transcripts requests that have arrived for you or you can begin the manual data entry process.
- “View completed transactions” allows you to view transaction that are complete.

TREx Home Page - Navigation

TREx
Texas Records Exchange System

Campus Registrar Trex | PEARCE H S Campus | Logout

First Name Last Name or Tracking # Search

Need Help?

Items Requiring Attention

	0	Inbound Requests
	1	Inbound Records/Transcripts
	0	Rejected Outbound Requests
	0	Rejected Outbound Records/Transcripts

Refresh

Records/Transcripts

- Send one record/transcript
- Send multiple records/transcripts
- View pending outbound records/transcripts (0)
- Manage records/transcripts
- View completed transactions

Requests

- Request a record/transcript
- View pending outbound requests (1)

Reporting

- Top 10 record/transcript sources
- Top 10 record/transcript destinations
- Top 10 request sources
- Top 10 request destinations
- Campus Activity Summary


Administration

- Upload record/transcript legend
- View record/transcript legend
- Remove record/transcript legend

Section: *Requests*

- “Request a record/transcript” allows you to begin the process for requesting a student record/transcript.
- “View pending outbound requests” allows you to view the status of requests sent by you.

TREx Home Page - Navigation





**TREx**
Texas Records Exchange System

Campus Registrar Tnex | PEARCE H S Campus | Logout




First Name Last Name or Tracking #



Need Help?

Items Requiring Attention






	0	Inbound Requests
	1	Inbound Records/Transcripts
	0	Rejected Outbound Requests
	0	Rejected Outbound Records/Transcripts

Top 10 Record/Transcript Destinations



Recipient	%	Total
 AUSTIN H S (AUSTIN ISD)	33.3	2
 BERKNER H S (RICHARDSON ISD)	33.3	2
 TRAVIS H S (AUSTIN ISD)	33.3	2








Records/Transcripts

-  Send one record/transcript
-  Send multiple records/transcripts
-  View pending outbound records/transcripts (0)
-  Manage records/transcripts
-  View completed transactions




Requests

-  Request a record/transcript
-  View pending outbound requests (1)

Reporting


-  Top 10 record/transcript sources
-  Top 10 record/transcript destinations
-  Top 10 request sources
-  Top 10 request destinations
-  Campus Activity Summary

Administration

-  Upload record/transcript legend
-  View record/transcript legend
-  Remove record/transcript legend

Section: *Reporting*:
As records/transcripts activity occurs within your campus' account, dynamic activity reports are automatically generated. These reflect the type of activity that has occurred in your campus account.

TREx Home Page - Navigation


**TREx**
Texas Records Exchange System


Campus Registrar Tnex | PEARCE H S Campus | Logout


First NameLast NameTracking #Search


Need Help?

Items Requiring Attention

 0 Inbound Requests




 1 Inbound Records/Transcripts


 0 Rejected Outbound Requests

 0 Rejected Outbound Records/Transcripts


Refresh


Top 10 Record/Transcript Destinations


Recipient	%	Total
 AUSTIN H S (AUSTIN ISD)	33.3	2
 BERKNER H S (RICHARDSON ISD)	33.3	2
 TRAVIS H S (AUSTIN ISD)	33.3	2





Records/Transcripts

 Send one record/transcript


 Send multiple records/transcripts


 View pending outbound records/transcripts (0)

 Manage records/transcripts


 View completed transactions


Requests


 Request a record/transcript


 View pending outbound requests (1)


Reporting

 Top 10 record/transcript sources


 Top 10 record/transcript destinations


 Top 10 request sources


 Top 10 request destinations

 Campus Activity Summary

Administration

 Upload record/transcript legend

 View record/transcript legend

 Remove record/transcript legend

Section: *Administration*:
Administration allows you to upload, view, and remove your campus high school transcript legend.

Training Objectives

1. Understanding TEA SE login to access TREx
2. Searching for a student and recent enrollment, via PID
3. Select student and recent campus of enrollment and request records from Exiting school and log out
4. Login as the Exiting registrar
5. View pending outbound requests for outstanding requests
6. Choose to fulfill, hold for grades, or reject request, or Manual Data Entry and add attachments, choose submit and log out
7. Log in as the original Requesting registrar, view inbound requests

Six TREx scenarios:

1. Generating a student request
2. Responding to a request
 - Fulfilling
 - Rejecting with reason
 - Holding for grades
3. Uploading a data file
 - without validation errors
 - with validation errors
4. Manual Data Entry
5. Sending the data
 - optional: send with attachments
6. Receiving the fulfilled request

Scenario 1: Generating a request

TREx
Texas Records Exchange System

Campus Registrar Tnex | PEARCE H S Campus | Logout

First Name Last Name Tracking # Search

Need Help?

Items Requiring Attention

- 0 Inbound Requests
- 1 Inbound Records/Transcripts
- 0 Rejected Outbound Requests
- 0 Rejected Outbound Records/Transcripts

Refresh

Top 10 Recipients

Recipient	%	Total
AUSTIN H S (AUSTIN ISD)	33.3	2
BERKNER H S (RICHARDSON ISD)	33.3	2
TRAVIS H S (AUSTIN ISD)	33.3	2

In the Requests section, select the "Request a record/transcript" link.

Records/Transcripts

- Send one record/transcript
- Send multiple records/transcripts
- View pending outbound records/transcripts (0)
- Manage records/transcripts
- View completed transactions

Requests

- Request a record/transcript
- View pending outbound requests (1)

Reporting


- Top 10 record/transcript sources
- Top 10 record/transcript destinations
- Top 10 request sources
- Top 10 request destinations
- Campus Activity Summary

Administration

- Upload record/transcript legend
- View record/transcript legend
- Remove record/transcript legend

The following screens describe how to request a student record/transcript.

Step 1. Enter student information

**TREx**
Texas Records Exchange System

Campus Registrar TREx | PEARCE H S Campus | Logout

First NameLast NameTracking #

Search


Request a record/transcript from another institution

Need Help?

1. Enter Student Information2. Select Institution3. Confirm and Submit4. Results

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.



Required Student

A

*First Name: Sandra

B

Middle Name:

Last Name: Clause

Suffix:

C

Gender:

*Date of Birth: 02/02/1998

Student #:

Urgency

Select the urgency of this request: Immediate

Cancel

Tab #1: Student Identification, at minimum, enter the required fields information:
A –“First Name”
B –“Last Name”
C –“Date of Birth” (format: mm/dd/yyyy)
D – Select the “Next>>” button.

D

Next >>

Step 2 a. Select Student

TREx
Texas Records Exchange System

First Name Last Name or Tracking # Search

Request a record/transcript from another institution

1. Enter Student Information 2. Select Institution 3. Confirm and Submit 4. Results

Select the institution from which the record/transcript is to be requested

Choose from your most frequently used institutions, or search for another institution.

C Requested Student

Name	Gender	Date of Birth
Clause, Sandra		02/02/1998

Requested Institution

Name	Address
(Please select the institution from which the record/transcript is being requested.)	

A Available Recipients

Most Frequently Used Institutions Search for an Institution **PID Search Results**

B Showing 0-0 of 0 |<< << 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 in the First, Last, and Middle Name fields.

First Name	Middle Name	Last Name	Suffix	Gender	Date of Birth	SSN	Institution Name	Institution Address
Sandra		Clause			02/02/1998			

(No items to display)

Cancel << Previous **Next >>**

D

Tab #2: Select Institution:

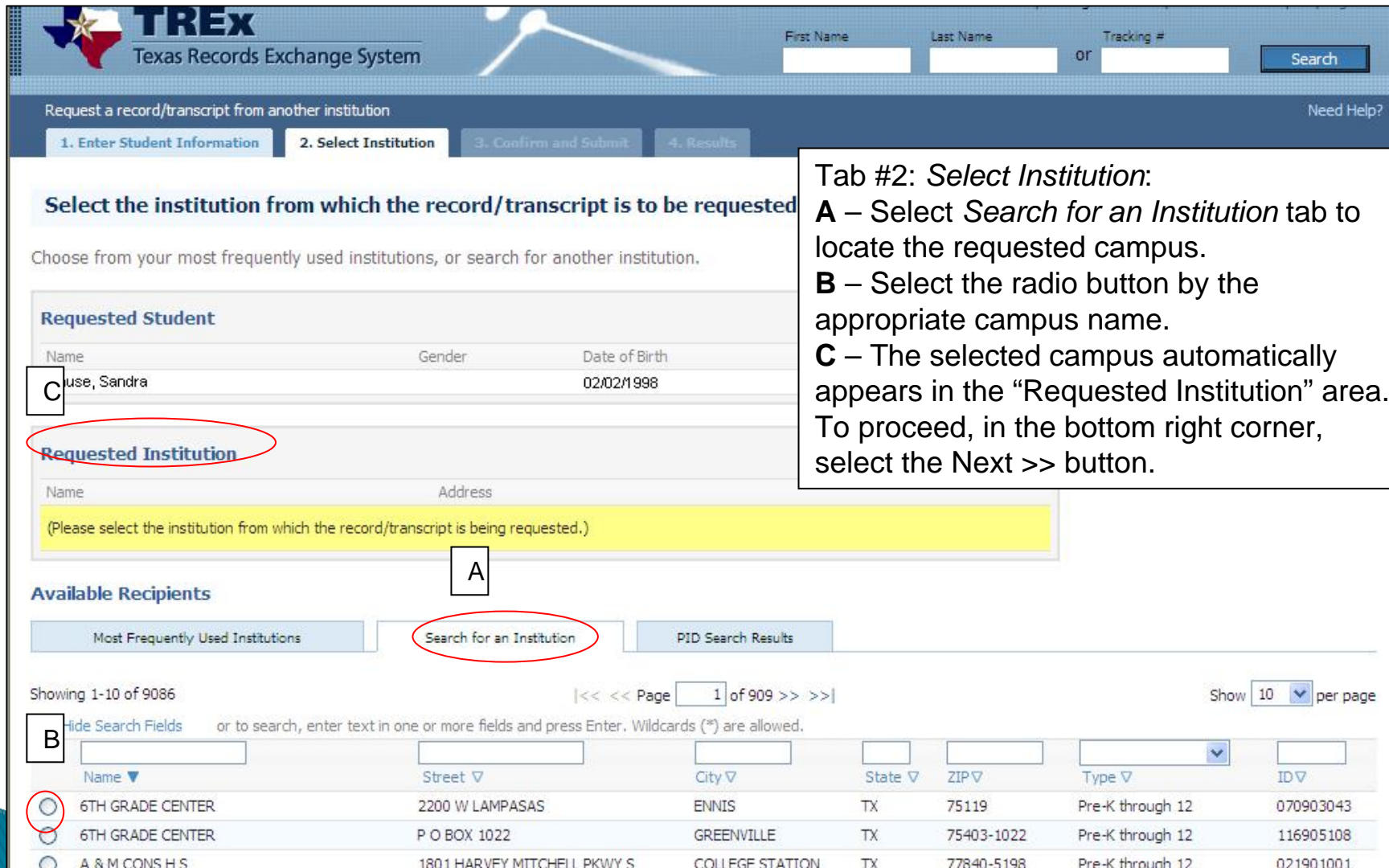
A – Select the *PID results* tab to view the potential students returned from the PID search.

B – Verify if the student was found in the PID results tab; if so select the corresponding student.

C – When the student is selected, the name automatically appears, along with the Date of Birth, in the “Requested Student” area.

D – Once the student’s name is selected, the Next button is enabled. To proceed to the next tab, select the Next >> button.

2 b. Identify previous campus of enrollment



TREX
Texas Records Exchange System

First Name Last Name Tracking # Search

Request a record/transcript from another institution Need Help?

1. Enter Student Information 2. Select Institution 3. Confirm and Submit 4. Results

Select the institution from which the record/transcript is to be requested

Choose from your most frequently used institutions, or search for another institution.

Requested Student

Name	Gender	Date of Birth
Cuse, Sandra		02/02/1998

Requested Institution

(Please select the institution from which the record/transcript is being requested.)

Available Recipients

Most Frequently Used Institutions Search for an Institution PID Search Results

Showing 1-10 of 9086 <<< << Page 1 of 909 >> >>> 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
6TH GRADE CENTER	2200 W LAMPASAS	ENNIS	TX	75119	Pre-K through 12	070903043
6TH GRADE CENTER	P O BOX 1022	GREENVILLE	TX	75403-1022	Pre-K through 12	116905108
A & M CONS H S	1801 HARVEY MITCHELL PKWY S	COLLEGE STATION	TX	77840-5198	Pre-K through 12	021901001

Tab #2: Select Institution:

A – Select *Search for an Institution* tab to locate the requested campus.

B – Select the radio button by the appropriate campus name.

C – The selected campus automatically appears in the “Requested Institution” area. To proceed, in the bottom right corner, select the Next >> button.

Step 3. Confirm and Submit request

TREx
Texas Records Exchange System

Campus Registrar TREx | PEARCE H S Campus | Logout

First Name Last Name Tracking # Search

Request a record/transcript from another institution

1. Enter Student Information 2. Select Institution 3. Confirm and Submit

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
CLAUSE, SANDRA

Requested Institution

Name Address
AUSTIN H S 1715 W CESAR CHAVEZ, AUSTIN, TX, 78703-4699

Urgency

The urgency of this request is Immediate.

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

Please send record as long as final grades are included. Characters remaining: 144

Cancel Send

<< Previous Send

Tab #3: Confirm and Submit

A – *Requested Student*, review and confirm the selected student.

B – *Requested Institution*, confirm the correct campus is selected.

C – If desired, you may add a comment in the *Enter a message...* box.

D – Select *Send* to send the record to the recipient.

Step 4. View Request Results

TREx
Texas Records Exchange System

Request a record/transcript from another institution

1. Enter Student Information 2. Select Institution 3. Confirm and Submit 4. Results

Request successful

A 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
CHAVEZ, SANDRA		09/12/1988

Tracking Information

Tracking #	Requested Institution	Street	City	State
R0000000704	AUSTIN H S	1715 W CESAR CHAVEZ	AUSTIN	TX

Message:

Please include student's final grades

Print

Request another record **Done**

Tab #4: Results

A – Requested Student area allows you to view the status of the request

B – Tracking Information area allows you to search and view this student's transaction history.

C – To print, select the *Print* button


D – Select either *Send Another Request* to generate another record request, returning you back to tab #1. Or, select the *Done* button to return to the TREx home page

Scenario 2: Responding to a Request

Options for responding to a request:

1. Fulfill
2. Reject
3. Hold for grades

Responding to a request


**TREx**
Texas Records Exchange System


Campus Registrar Tnex | AUSTIN H S Campus | Logout


First NameLast NameTracking #Search


Need Help?

Items Requiring Attention

 → 2 Inbound Requests


 → 0 Inbound Records/Transcripts


 × 0 Rejected Outbound Requests

 × 0 Rejected Outbound Records/Transcripts


Refresh


Top 10 Record/Transcript Destinations


Recipient	%	Total
 BERKNER H S (RICHARDSON ISD)	100.0	1





Requests

 Send one record/transcript


 Send multiple records/transcripts


 View pending outbound records/transcripts (0)


 Manage records/transcripts


 View completed transactions


Reporting

 Top 10 record/transcript sources

 Top 10 record/transcript destinations

 Top 10 request sources

 Top 10 request destinations

 Campus Activity Summary

To fulfill a request, under the *Items Requiring Attention* area, select the *Inbound Requests* link.

The following screens describe how to fulfill a request sent to you from another campus.

Responding to an Inbound Request

TREx
Texas Records Exchange System

Campus Registrar Trex | AUSTIN H S Campus | Logout

First Name Last Name Tracking # Search

Need Help?

Requests sent to AUSTIN H S

Showing 1-2 of 2

<<< << Page 1 >> >>>

Show 10

Show Search Fields to search for items in the list.

Requested	Urgency	Status	Last Name	First Name	Student #	Sent From	
<input checked="" type="checkbox"/> 10/17/2007 10:59:03 AM	Immediate	Awaiting fulfillment	Clause	Sandra		PEARCE H S	Details
<input type="checkbox"/> 10/16/2007 03:39:32 PM	Immediate	Awaiting fulfillment	Doe	Joe		PEARCE H S	Details

10/16/2007 03:39:32 PM

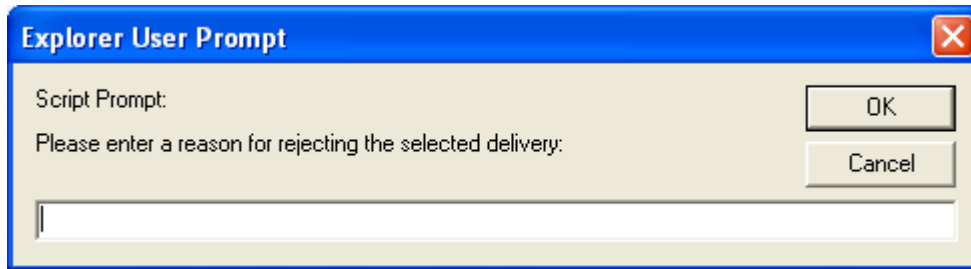
[Fulfill](#) [Hold for Grades](#) [Reject](#)

[Done](#)

A – Select the radio button next to the student's name.
B – Select either *Fulfill*, *Hold for Grades*, or *Reject*. The following screens describe each of these three options.
C – When done, select the *Done* button.

Rejecting or holding for grades

A



Explorer User Prompt

Script Prompt:

Please enter a reason for rejecting the selected delivery:

OK

Cancel

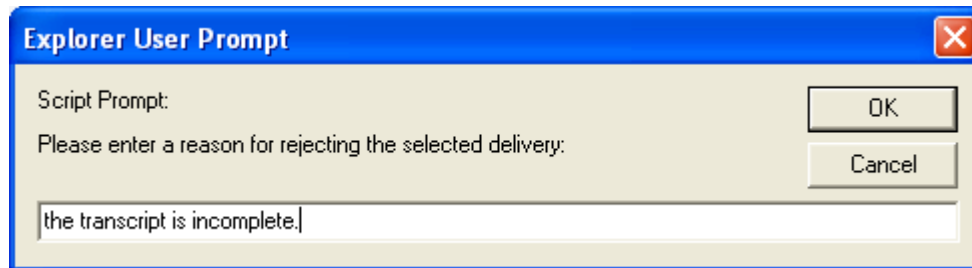
A text input field is located below the prompt, currently empty.

A – After choosing either to reject or hold for grades, a message box displays.

B – Enter a reason. The character limit is 255.

All information entered here becomes a permanent record for this specific student in the TREx system.

B



Explorer User Prompt

Script Prompt:

Please enter a reason for rejecting the selected delivery:

OK

Cancel

the transcript is incomplete.

TREx Required Data Entry Elements

Below is the list of required data elements that must be correctly entered in either the student data file, or through the TREx manual data entry process. When performing the TREx manual data entry process the required elements are identified with an asterisk. It is recommended that registrars become familiar with the TREx data standards and data schema requirements documentation available at the TEA TREx website: <http://www.tea.state.tx.us/trex/datastds/>

Data Element Common Name	XML Name
Student ID	StudentID
First Name	FirstName
Last Name	LastName
Gender Code	Gender
Ethnicity Code	Race
Date of Birth	BirthDate
District ID	DistrictID
Campus ID	SchoolID
Campus Name	SchoolName
Campus Phone	PhoneNumber
Academic Year	SchoolYear
Grade Level (Current)	GradeLevel

Step 1. Fulfilling a request

A

Fulfill a request from PEARCE H S

1. Select Record/Transcript

2. Confirm and Submit

3. Review

Select a student record/transcript to match the

Any differences between the requested and selected students

B

Requested Student

Name	Gender
Clause, Sandra	

Selected Student

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

C

Available Students

TREx found no records matching the request. You may records.

Matching Records/Transcripts

Search for a Record/Transcript

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.

Last Name	First Name	Middle Name	Suffix	Gender	Date of Birth	Student #	Uploaded	View	Attachments
CLAUDE	SANDRA			Female	02/02/1998	55AA1A663	10/17/2007 10:24:18 AM	PDF	

All times in local time

D

Cancel Upload

E

Next >>

A – When you chose to fulfill a student request, the first tab *Select Record/Transcript* appears.

B – You will see the student's name in the *Requested Student* area.

C – If you see the student's name in the *Search for a Record/Transcript* tab or the *Matching Records/Transcripts* tab, you already have the student uploaded into TREx and can simply select the radio button next to the student's name. If the student's name does NOT appear in the *Available Students* area, you need to either *Upload* the data file extracted from your local Student Information System, or go to the *Manage Records* workflow and manually enter the student into TREx. (See later slides for instructions about Manual Data Entry process.)

D – If you chose to upload a student's data file, select the *Upload* button. The next slides present the process for uploading a data file into TREx.

E – To proceed to the upload process, select the *Next >>* button.

Fulfilling a request through Uploading a Data File

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Texas Records Exchange System

Campus Registrar Trex | AUSTIN H S Campus | Logout

First Name _____ Last Name _____ Tracking # _____ or _____ Search

Upload Records/Transcripts for institution AUSTIN H S

Please browse for a record file to be uploaded:

A Please browse for a record file to be uploaded:

Browse...

B Choose file

Look in: TREx

Name	Size
0596DOE_JANE_stu.XML	34 KB
1255SMITH_JOHN_stu.XML	34 KB
2262LEARNER_TEX_stu.XML	562 KB
2722STUDENT_IMA_stu.XML	34 KB
3456STUDENT_SHEILA_stu.XML	34 KB
4495DOE_JOHN_stu.XML	562 KB
5931LEARNER_AUSTIN_stu.XML	34 KB
7080LEARNER_SALLY_stu.XML	28 KB
7663CLAUS_SANDRA_stu.XML	27 KB
9788STUDENT_HOUSTON_st...	27 KB

C Please browse for a record file to be

C:\TREx\7663CLAUS_SANDRA_stu.XML

D Upload

E Done

A – After choosing the *Upload* button, select the *Browse...* button to navigate to the student's data file.

B – Locate the data file to upload and select the *Open* button.

C – The network path location of the data file appears.

D – Select the *Upload* button. A process bar displays. Results of the data validation process appear, allowing you to view any Errors or Warnings that result out of the upload process. Errors must be resolved within the data file from your Student Information System. Correcting Warnings is up to your discretion.

E –To proceed, select the *Done>>* button.

Accessing Manage Records for Manual Data Entry

TREx
Texas Records Exchange System

Campus Registrar Trex | PEARCE H S Campus | Logout

First Name _____ Last Name _____ or Tracking # _____

Need Help?


A – From the TREx homepage, select the *Manage Records/Transcripts* to begin the Manual Data Entry (MDE) process

Items

- 0 Inbound Requests
- 1 Inbound Records/Transcripts
- 0 Rejected Outbound Requests
- 0 Rejected Outbound Records/Transcripts

Top 10 Record/Transcript Destinations

Recipient	%	Total
AUSTIN H S (AUSTIN ISD)	33.3	2
BERKNER H S (RICHARDSON ISD)	33.3	2
TRAVIS H S (AUSTIN ISD)	33.3	2



Records/Transcripts

- Send one record/transcript
- Send multiple records/transcripts
- View pending outbound records/transcripts (0)
- A** Manage records/transcripts
- View completed transactions

Requests

- Request a record/transcript
- View pending outbound requests (1)

Reporting

- Top 10 record/transcript sources
- Top 10 record/transcript destinations
- Top 10 request sources
- Top 10 request destinations
- Campus Activity Summary

Administration

- Upload record/transcript legend
- View record/transcript legend
- Remove record/transcript legend

Fulfilling a request through Manual Data Entry

TREx
Texas Records Exchange System

Kathryn O'Dell | REAGAN H S Campus | Logout

First Name Last Name Tracking # Search

Need Help?

Manage Records/Transcripts for REAGAN H S

Showing 1-5 of 5 << << Page 1

Show Search Fields to search for items in the list.

<input type="checkbox"/>	Last Name ▾	First Name ▾	Middle Name ▾	Suffix	Gender ▾	Date of Birth ▾	Student							
<input type="checkbox"/>	DOE	JANE			Female	01/26/1987	55AA1A6							
<input type="checkbox"/>	SINGER	IMA			Female	08/27/1986	55AA3A722	Local upload	10/05/2007 01:01:36 PM	PDF	Download	Add attachment		
<input type="checkbox"/>	LEARNER	JESSICA			Female	08/27/1986	55AA2A080	Local upload	10/05/2007 01:03:32 PM	PDF	Download	Add attachment		
<input type="checkbox"/>	LEARNER	TEX			Male	08/20/1988	55AA2A262	Local upload	10/05/2007 01:04:48 PM	PDF	Download	Add attachment		
<input type="checkbox"/>	STUDENT	SALLY			Female	06/25/1984	55AA2A788	Local upload	10/05/2007 01:05:07 PM	PDF	Download	Add attachment		

All times in local time zone.

A

Delete Upload **Create** Done

A – If you are unable to upload a student data file, you have the option to perform the Manual Data Entry process. Select the *Create* button to begin manual data entry.

The following slides demonstrate the process for completing the manual data process.

MDE: Student/School Information Tab

A

B

Next>>

Student and School Information

Enter the student and school information. Required fields are marked with an asterisk (*).

Student Identification

* First Name: Sally
Middle Name:
* Last Name: Student
Suffix: ☒
Address: 123 Austin
City: Austin
State/Province: ☒
Country: ☒
Postal Code: 12345
* Student Id: 55AAQAT88
Prior Id:
Local Id:

School

* School Id: 987654321
* School Name: Austin H S
* District Id: 123456
District Name:
Address:
City:
State/Province: ☒
Country: ☒
Postal Code:
* Phone Number: 512 1234567
Fax:

Parents

First Name	Middle Name	Last Name	Suffix
Add			

Immunizations

Name	Date	Dose
Add		

Demographics

* Gender: ☒
* Race: ☒ White, not of Hispanic origin
* Date of Birth: 1993-10-31
Language: ☒
Migrant: ☒
Homeless: ☒

Disciplinary Actions

Date	End Date	Number	Reason
Add			

A – The *Student/School Information* tab will open, prompting you to enter the data. Remember that required elements are identified by an asterisk.

B – Once data is entered in this tab, to proceed select the *Next>>* button.

MDE: Student/School Information Tab

A Enrollment/Academic Information

Enter the enrollment and academic information. Required fields are marked with an asterisk(*).

B Previous **C** Next>>

Enrollment

Grade Level: ☒

Entry Date: ☒

Exit Date: ☒

Withdrawal Date: ☒

Withdrawal Reason: ☒

Grade Placed: ☒

Grade Promoted: ☒

Grade Retained: ☒

Attendance

Days Attended:

Days Absent:

Special Programs

Unmet English Proficient: ☒

Economically Disadvantaged:

At Risk:

Title I:

Special Education:

Individual Education Plan: ☒

Bilingual: ☒

English as Second Language: ☒

Gifted and Talented: ☒

Career and Technical Education: ☒

Personal Graduation Plan: ☒

Academic Status

Graduation Date: ☒

Graduation Diploma Type: ☒

Certificate Date: ☒

Texas Grant: ☒

Academic Summary

Grade Point Average:

Class Total Number:

Class Rank:

Class Ranking Date: ☒

Quantile: ☒

College Campus Code:

B Previous **C** Next>>

A – The *Enrollment/Academic* tab opens prompting you to enter the data accordingly. Remember that the required elements are identified by an asterisk.

B – To return to the preceding tab, select the *Previous* button.

C – Once data is entered under this tab, to proceed select the *Next>>* button.

MDE: Current Coursework Tab

The screenshot displays the TREx Texas Records Exchange System interface. At the top, the logo features a Texas state outline with a star and the text 'TREx Texas Records Exchange System'. To the right, user information 'Kathryn O'Dell | REAGAN HS Campus | Logout' is visible. Below this is a search bar with fields for 'First Name', 'Last Name', and 'Tracking #', followed by a 'Search' button and a 'Need Help?' link. A navigation bar contains seven tabs: '1. Student/School', '2. Enrollment/Academic', '3. Current Coursework' (which is highlighted), '4. Completed Coursework', '5. Assessments', '6. Validate', and '7. Create'. Below the tabs, the 'Current Coursework' section is titled 'Enter the current coursework information.' It contains a form with three input fields: 'Current Coursework', 'Grade Level', 'School Year', and 'Courses'. An 'Add' link is positioned below the 'Current Coursework' field. To the left of the 'Add' link is a 'Cancel' button, labeled with a box 'A'. To the right of the form are two sets of navigation buttons. The top set includes '<< Previous' (labeled with a box 'B') and 'Next >>' (labeled with a box 'C'). The bottom set includes '<< Previous' (labeled with a box 'B') and 'Next >>' (labeled with a box 'C'). The 'Cancel' button and both 'Previous' buttons are circled in red.

A – The *Current Coursework* tab allows you to enter the student's current coursework information. Select the *Add* link to begin entering each individual coursework's information.

B – To return to the preceding tab, select the *Previous* button.

C – Once data is entered in this tab, select the *Next>>* button.

MDE: Completed Coursework Tab

The screenshot displays the TREx Texas Records Exchange System interface. At the top, the header includes the TREx logo, the text "Texas Records Exchange System", and a user profile for Kathryn O Dell at REAGAN HS Campus. Below the header is a navigation bar with tabs: 1. Student/School, 2. Enrollment/Academic, 3. Current Coursework, 4. Completed Coursework (highlighted), 5. Assessments, 6. Validators, and 7. Print and Create. The main content area is titled "Completed coursework" and contains the instruction "Enter the completed coursework information." Below this is a table with columns for "Completed Coursework", "Grade Level", "School Years", and "Courses". An "Add" link is positioned below the table, and a "Cancel" button is at the bottom left. Navigation buttons "<< Previous" and "Next >>" are located at the bottom right of the table area. Red circles and labels A, B, and C are used to highlight specific elements: A points to the "Completed Coursework" tab, B points to the "<< Previous" button, and C points to the "Next >>" button.

- A** – The *Completed Coursework* tab allows you to enter the student's completed coursework information from prior academic sessions. Select the *Add* link to begin entering each individual coursework information.
- B** – To return to the preceding tab, select the *Previous* button.
- C** – Once data is entered in this tab, select the *Next>>* button.

MDE: Assessment tab

A – The *Assessment* tab allows you to enter the student's assessment information. Select the *Add* link to begin entering each individual assessment information.

B – When selecting the *Add* link the Add Assessment screen determination appear. Enter the data accordingly. To continue to add assessments, select the *Add* button.

C – Select the *Add Sub Test* link to enter a specific test's sub test (such as GT Profile) information.

D – To return to the preceding tab, select the *Previous* button.

E – Once data is entered in this tab, select the *Next>>* button.

MDE: Validate tab

TREx
Texas Records Exchange System

Kathryn O'Dell | REAGAN H S Campus | Logout

Create a record/transcript

1. Student/School 2. Enrollment/Academic 3. Current Coursework 4. Completed Coursework 5. Assessments 6. Validate

A Review the details of this record/transcript

Review the record and click Validate to ensure the document conforms to the TREx data standard and meets the state minimum requirements.

B << Previous

C Validate

Student/ School Information

Student Identification

First Name: Sally
Middle Name:
Last Name: Student
Suffix:
Address:
City:
State/Province:
Country:
Postal Code:
Student Id: 55AA2A788
Prior Id:
Local Id:

School

School Id: 987
School Name: Aus
District Id: 123
District Name:
Address:
City:
State/Province:
Country:
Postal Code:
Phone Number: 5121234567
Fax:

Parents
No parents

Immunizations
No immunizations

Demographics

Gender: F
Race: 5 - White, not of Hispanic origin
Date of Birth: 1983-10-31

This screen continues beyond the demographic information

MDE: Confirm and Create with Validation Results

The screenshot displays the TREx Texas Records Exchange System interface. At the top, the header includes the TREx logo, the text 'Texas Records Exchange System', and a user profile for Kathryn O'Dell at REAGAN H S Campus. Below the header is a navigation bar with seven tabs: 1. Student/School, 2. Enrollment/Academic, 3. Current Coursework, 4. Completed Coursework, 5. Assessments, 6. Validate, and 7. Confirm and Create. The 'Confirm and Create' tab is active. On the left side of the main content area, there is a section labeled 'Validation Results' (circled in red) and a message 'File failed with exceptions' (also circled in red). Below this, there are links for 'Expand All' and 'Collapse All'. A section titled 'Student Record/Transcript for Student, Sally' is visible, with a 'Cancel' button below it. On the right side, there are two '<< Previous' buttons. The interface is designed with a blue and white color scheme.

A

B

A –The *Confirm and Create* tab allows you to review the results of the validation procedure.

B – Depending on the quality of the entered data, you may have data errors or data warnings. Data errors must be resolved. Data warnings are simply warnings and are not required within the TREx system to be resolved.

MDE: Confirm and Create with Validation Results

TREx
Texas Records Exchange System

Kathryn O'Dell | REAGAN HS Campus | Logout

Create a record/transcript

1. Student/School 2. Enrollment/Academic 3. Current Coursework 4. Completed Coursework 5. Assessments 6. Validate 7. Confirm and Create

Validation Results

A File failed with exceptions.

Expand All Collapse All

Student Record/Transcript for Student, Sally

The DistrictID contained within the CampusID must match an entry registered with the TEA.
...The CampusID must match an entity registered with TEA.
GraduationDiplomaType is required if GradeLevel is 11 or 12.

Cancel

B << Previous

A – To view the exact errors or warnings, select the *Expand All* link. Or, when expanded, you can select the *Collapse All*.

B – If you need to modify any entered data to resolve errors or warnings, you can return to the desired tab by selecting the *Previous* button throughout the MDE tabs.

MDE: Confirm and Create

The screenshot shows the TREx web application interface. At the top, there is a header with the TREx logo and a navigation bar with tabs: 1. Student/School, 2. Enrollment/Academic, 3. Current Coursework, 4. Completed Coursework, 5. Assessments, 6. Validate, and 7. Confirm and Create. The 'Confirm and Create' tab is selected. Below the tabs, the 'Validation Results' section displays a message: 'File successfully validated with warnings'. Below this message, there is a 'Cancel' button. At the bottom right, there are two buttons: '<< Previous' and 'Create'. Both buttons are circled in red. Above the 'Create' button, there is a box labeled 'B'. Above the '<< Previous' button, there is a box labeled 'A'.

A – To modify any data, you can return to the desired tab by selecting the *Previous* button throughout the MDE tabs.

B – When you are satisfied with the entered data and ready to proceed, select the *Create* button.

Manual Data Entry Outcome

Kathryn O'Dell | REAGAN H SCampus | Logout

First Name

Last Name

or

Tracking #

Search

Need Help?

Manage Records/Transcripts for REAGAN H S

Showing 1-6 of 6

<< < Page 1 > >>

Show 10

Show Search Fields to search for items in the list:

<input type="checkbox"/>	Last Name ▾	First Name ▾	Middle Name ▾	Suffix	Gender ▾	Date of Birth ▾	Student # ▾	Source	Uploaded/Received ▾	View	Attachments
<input type="checkbox"/>	DOE	JANE			Female	01/26/1987	55AA1A696	Local upload	10/05/2007 01:04:31 PM	PDF Download	3 attachments
<input type="checkbox"/>	SINGER	IMA			Female	08/27/1986	55AA3A722	Local upload	10/05/2007 01:01:36 PM	PDF Download	Add attachment
<input type="checkbox"/>	LEARNER	JESSICA			Female	08/27/1986	55AA2A080	Local upload	10/05/2007 01:03:32 PM	PDF Download	Add attachment
<input type="checkbox"/>	SINGER	IMA			Female	10/31/1983	512345678	Local upload	10/05/2007 01:39:43 PM	PDF Download	Add attachment
<input type="checkbox"/>	STUDENT	SALLY			Male	08/20/1988	55AA2A788	Local upload	10/05/2007 01:04:48 PM	PDF Download	Add attachment
<input type="checkbox"/>	LEARNER	TEX			Female	06/25/1984	55AA2A262	Local upload	10/05/2007 01:05:07 PM	PDF Download	Add attachment


Delete

Upload

Done

- A** – Once the manual data entry process is complete, you will be returned to the *Manage Records/Transcripts for your school* screen.
- B** – Notice the student that was just entered is in smaller font size.
- C** – To view the student's entered information, select the PDF link.
- D** – You can view or save the actual .xml data file that was created from the **MDE** process.
- E** – You can add or view student attachments.
- F** – When completed, select the *Done* button.

Step 2. Fulfilling a Request

 **TREx**
Texas Records Exchange System

Campus Registrar Trex | AUSTIN H S Campus | Logout


First Name Last Name or Tracking #

Fulfill a request from PEARCE H S Need Help?

1. Select Record/Transcript 2. Confirm and Submit 3. Results

Select a student record/transcript to match the request

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



A Requested Student

Name	Gender	Date of Birth	Student #
STUDENT, SALLY	Female		

Selected Student

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

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.

Matching Records/Transcripts

	Last Name	First Name	Middle Name	Suffix	Gender	Date of Birth	Student #	Uploaded	View	Attachments
<input type="radio"/>	STUDENT	SALLY			Female	02/02/1988	55AA2A788	10/17/2007 01:42:22 PM	PDF	

All times in local time zone

C

A – See the student in the *Requested Student* area.
B – Once you have either uploaded the student data file or performed the manual data entry process, the student's name appears in the *Available Student* area. Select the radio button next to the student's name.
C – To proceed select the *Next>>* button.

Step 3. Confirm and Submit

Fulfill a request from PEARCE H S Need Help?

1. Select Record/Transcript 2. Confirm and Submit 3. Results

Review the details of this request fulfillment

When you click the "Send" button below, TREx will translate the data into the requested preferred format and send the record/transcript. On the next screen, TREx will provide a 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, SALLY	Female	02/02/1988

Selected Student

Name	Gender	Date of Birth	Student #	View	Attachments	Program Type
STUDENT, SALLY	Female	02/02/1988	55AA2A788	PDF		Distinguished

Requesting Institution

Name	Address
PEARCE H S	1600 N COIT RD, RICHARDSON, TX, 75080-2805

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

A Characters remaining: 153

B ☐ 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.

A – In the optional message box, you can enter information for the receiving registrar to see. Note information entered here becomes a permanent record to this student's transaction.

B – The registrar must check the assurance checkbox before sending the record.

Step 4. Results



Campus Registrar Trex | AUSTIN H S Campus | Logout

First Name Last Name OR Tracking #

Fulfill a request from PEARCE H S

Need Help?

A 1. Select Record/Transcript 2. Confirm and Submit 3. Results

Fulfillment successful

This record/transcript has been sent to TREx for processing. Use the tracking number shown 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, Sally		02/02/1988

Delivered Student

Name	Gender	Date of Birth	Student #	View
STUDENT, SALLY	Female	02/02/1988	55AA2A788	PD

Tracking Information

Tracking #	Requesting Institution	Street	City	State
R0000000709	PEARCE H S	1600 N COIT RD	RICHARDSON	TX

Message:

C This data file includes Sally's final grades.

A – In the *Results* tab is a summary of the response information.

B – The TREx unique tracking number is listed. You may select the *Tracking #* link to view the status.

C – Select the Print button to print this page.

D – To fulfill another request, select the *Fulfill Another Request* button.

E – If you choose not to fulfill another request, you can select the *Done* button and return to the TREx homepage.

End of part 1 training
session for ESCs