

This is part 2 of TREx training for ESCs

Adding Attachments

TREx
Texas Records Exchange System

Kathryn O'Dell | REAGAN H S Campus | Logout

First Name: [] Last Name: [] Tracking #: [] OR [] Search

Need Help?

Manage Records/Transcripts for REAGAN H S

Showing 1-5 of 5 |<< << 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	2 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"/>	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 – Select the Upload button to upload a student's data file (XML extract from your local SIS) into TREx.

Adding Attachments

First Name Last Name Tracking #

[Need Help?](#)

Manage Records/Transcripts for REAGAN H S

Showing 1-5 of 5

<< < Page > >>

Show

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 A	2 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	Add attachment
<input type="checkbox"/>	LEARNER	TEX			Male	08/20/1988	55AA2A262	Local upload	10/05/2007 01:04:48 PM	PDF B	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 – Student record/transcripts that you accept and receive also can be found in the Manage Records location. If the record includes attachments, you can view or download them by selecting the *Attachments* link after you have accepted the record.

B – Select the *Add attachment* link to add an attachment to a student's record.

Step 4a. Adding attachments

TREx
Texas Records Exchange System

Campus Registrar Trex from TRAVIS HS | Logout

First Name Last Name or Tracking #

Upload Attachment for REGINA M ANONYMA

Please browse for one or more documents to be uploaded:

A

B

D **C**


A – select the *Browse* button to find an attachment. Navigate to the location of the file and select the *Open* button.

B – After adding an attachment (A), TREx automatically prompts you to be able to add another attachment.

C – Select the *Upload* button to finish the attachment upload process.

D – Select the *Cancel* button to end the add attachment process without uploading the attachment file.

Step 5: Sending a student (Scenario 5)





Campus Registrar TReX | PEARCE H S Campus | Logout


First NameLast NameTracking #Search


Need Help?

Items Requiring Attention

0Inbound Requests




1Inbound Records/Transcripts


0

0

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


A

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

A – From the TREx homepage, select the *Send one record/transcript* link to begin the process for sending one student record.

Step 6: Identify the student

TREx
Texas Records Exchange System

Campus Registrar Trex | AUSTIN H S Campus | Logout

Send a record/transcript to multiple recipients

1. Select Record/Transcript 2. Select Recipients 3. Confirm as

Select the student record/ transcript to be sent

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

Selected Student

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

Available Students

Showing 1-2 of 2 Page 1 Show 10

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
<input type="radio"/> SINGER	IMA			Female	04/12/1989	55AA3A722	10/17/2007 01:42:22 PM	PDF	
<input checked="" type="radio"/> STUDENT	SALLY			Female	02/02/1988	55AA2A788	10/17/2007 10:24:18 AM	PDF	

All times in local time zone


Cancel Upload **Next >>**

A – If the student record/transcript already resides within TREx, the student is listed in the *Available Students* area. Once identified, select the student by clicking on the radio button next to their name. If a student is not listed, you can either upload the student's data file or complete the manual data entry process (see previous slides for instructions).

B – The student's name is automatically added to the Selected Student area.

C – To proceed, select the *Next >>* button.

Step 7: Identify the recipient

**TREx**
Texas Records Exchange System

Campus Registrar Trex | AUSTIN H S Campus | Logout

First NameLast NameTracking #orSearch

Send a record/transcript to multiple recipientsNeed Help?

1. Select Record/Transcript2. Select Recipients3. Confirm and Submit4. Results

Select the recipients of the record/transcript

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

Selected Student

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

Recipients

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

Available Recipients

[Most Frequently Used Recipients](#)[Search for Institutions](#)

Name	Address
Select PEARCE H S	1600 N COIT RD, RICHARDSON, TX, 75080-2805
Select BERKNER H S	1600 E SPRING VLY RD, RICHARDSON, TX, 75081-5399

[Cancel](#)[Previous](#)[Next](#)

A – Select a recipient by locating the campus from either the *Most Frequently Used Recipient* or the *Search for Institution* tab. Once found, select the *Select* link.

B – The chosen recipient automatically populates in the *Recipients* area.

C – To proceed, select the *Next >>* button.

Step 8: Verify and approve request

Fulfill a request from PEARCE H S Need Help?

1. Select Record **A** 2. Confirm and Submit **B** 3. Results

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 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 #
STUDENT, SALLY	Female	02/02/1988	55AA2A788

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

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

This data file includes final grades. Characters remaining: 153

C ☐ 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.

D << Previous Send

A – In the *Confirm and Submit* tab, review the record/transcript delivery summary.

B – You may enter a message for the receiving campus. (Remember information entered here becomes a permanent record within TREx.)

C – Once reviewed, confirm all information including the intended recipient information and select the check box, confirming the record is verified and correct.

D – To proceed, select the *Send* button.

Step 9: View an approved (pending) request


Before sending, you can view the student's student record and transcript by selecting the .pdf link.

TREx Watermark on High School Transcripts

- * The graduation program watermark on the transcript remains **PENDING** until the record/transcript is sent.
- * Once sent, the graduation program watermark turns to **UNOFFICIAL** until the recipient accepts and downloads the transcript.
- * When the recipient accepts the record/transcript, the watermark automatically changes to **OFFICIAL**.

TEXAS Academic Achievement Record							
Student Name:	STUDENT, SALLY			District ID:	237901		
Student ID:	5AA2A788			District Name:	Austin ISD		
Prior ID:				Campus ID:	237901002		
Local ID:				Campus Name:	Austin High School		
Student Address:	123 Austin			Campus Address:	5555 W. Cesar		
City/State/Zip:	Austin TX 82604			City/State/Zip:	Austin TX 78555		
Date of Birth:	02/02/1988			County:			
Gender:	Female			Campus Phone:	(555) 555-5555		
Ethnicity:	Hispanic			Campus Fax:			
				College Board:	555555		
Academic Year: 2004-2005 Campus Awarding Credit:							
Category	Course Name	Semester 1	Semester 2	Credit	Explanation	Pass/Fail Code	
Other	WIA Credit		3.454	0.5	E		01
Total Credits for Year				0.5			
Academic Year: 2004-2005 Campus Awarding Credit:							
Category	Course Name	Semester 1	Semester 2	Credit	Explanation	Pass/Fail Code	
English LA	English 11		3.454	0.5	E		01
Math	Algebra II		3.454	0.5	E		01
Science	Env Science		3.454	0.5	E		01
Social	World History		3.454	0.5	E		01
Fine Arts	Art Drawing 1-3		3.454	0.5	E		01
CTE	Fam-ConSci 1-3		3.454	0.5	E		01
Other	MicrosoftOfficeXP		3.454	0.5	E		01
Total Credits for Year				3.5			
Academic Year: 2005-2006 Campus Awarding Credit:							
Category	Course Name	Semester 1	Semester 2	Credit	Explanation	Pass/Fail Code	
English LA	English 11		3.454	0.5	E		01
Math	Algebra II		3.454	0.5	E		01
Science	Env Science		3.454	0.5	E		01
Social	World History		3.454	0.5	E		01
Fine Arts	Art Drawing 1-3		3.454	0.5	E		01
CTE	Vo Ag II		3.454	0.5	E		01
Other	Fam-ConSci 1-3		3.454	0.5	E		01
Total Credits for Year				3.5			
Academic Year: 2005-2006 Campus Awarding Credit:							
Category	Course Name	Semester 1	Semester 2	Credit	Explanation	Pass/Fail Code	
Other	WIA Credit		3.454	0.5	E		01
Total Credits for Year				0.5			
Academic Year: 2006-2007 Campus Awarding Credit:							
Category	Course Name	Semester 1	Semester 2	Credit	Explanation	Pass/Fail Code	
English LA	English 12		3.454	0.5	E		01
Math	Algebra III/Trig		3.454	0.5	E		01
Fine Arts	Draw /Painting 1-3		3.454	0.5	E		01
	Guitar 1		3.454	0.5	E		01
CTE	Child Development		3.454	0.5	E		01
	CondEd/WR Training		3.454	0.5	E		01
Other	Teacher Aide		3.454	0.5	E		01
Total Credits for Year				3.5			
Academic Year: 2006-2007 Campus Awarding Credit:							
Category	Course Name	Semester 1	Semester 2	Credit	Explanation	Pass/Fail Code	
English LA	ENGLISH		3.454	0.5	E		01
Math	ALGEBRA		3.454	0.5	E		01
Science	Phys. Science		3.454	0.5	E		01
Social	US History		3.454	0.5	E		01

Step 10: Delivery activity

**TREx**
Texas Records Exchange System

Campus Registrar Trex | AUSTIN H S Campus | Logout

First NameLast NameorTracking #Search

Send a record/transcript to multiple recipientsNeed Help?

1. Select Record/Transcript2. Select Recipients3. Confirm and Submit4. Results

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
STUDENT, SALLY	Female	02/02/1988	55AA2A788	PDF	

Tracking Information

Tracking #	Recipient	Address
00000000710	PEARCE H S	1600 N COIT RD, RICHARDSON, TX, 75080-2805

Message:

C student should arrive to your campus Monday, October 15

[Print](#)[Send Another Record](#)[Done](#)

A –To view the results of a transaction, choose the .pdf link.


B – To monitor the status of the transaction, select tracking number. (See next slide to view transaction history).

C – Select the *Print* button to print.

D – To send another record/transcript, select the *Send Another Record* link.

E – Select the *Done* button to return to the Home Page.

Step 11: View transaction details



Campus Registrar Trex | AUSTIN H S Campus | Logout

First NameLast NameTracking #Search

Need Help?

Details for delivery D0000000710

Delivered Student

Name	Gender	Date of Birth	Student #	view	Attachments
STUDENT, SALLY	Female	02/02/1988	55A,A2A,788	B PDF	

Delivery Information

Sent By	From	To	Status	Handled By
trexcampreg5	AUSTIN H S	PEARCE H S	Arrived	

A
History

Date/Time	Event
10/17/2007 03:17:03 PM	Delivery created. Records/transcripts were translated into the appropriate format for PEARCE H S, RICHARDSON, TX. User comments: "This student should arrive to your campus Monday, October 15"
10/17/2007 03:17:03 PM	Delivery approved. Approved by trexcampreg5 at AUSTIN H S, AUSTIN, TX.
10/17/2007 03:17:03 PM	Delivery arrived and awaiting acceptance. Records/transcripts were sent electronically to PEARCE H S, RICHARDSON, TX.


C
Done

A – After selecting the tracking number link, you can view the historical details of the record.

B – To view the student's transcript, select the *PDF* link.

C – To return to the Home Page, select the *Done* button.

Scenario 6: Receiving a fulfilled request



Campus Registrar Tnex | PEARCE H S Campus | Logout

First NameLast NameTracking #orSearch

Need Help?

Items Requiring Attention

A

Inbound Requests

Inbound Records/Transcripts


Rejected Outbound Requests

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

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

A – In the *Items Requiring Attention* section, select the “Inbound Records/Transcripts” link.

Step 1. Accepting a Record

TREx
Texas Records Exchange System

Kristin Newkirk | AUSTIN H S Campus | Logout

First Name Last Name Tracking # Search

Need Help?

Records/Transcripts sent to AUSTIN H S

Showing 1-4 of 4 |<< << Page 1 >> >> Show 10

Show Search Fields to search for items in the list.

<input type="checkbox"/>	Delivered▲	Last Name▼	First Name▼	Student #▼	Sent From	View Record
<input type="checkbox"/>	10/04/2007 11:49:45 AM	SINGER	IMA	55A03A722	ACES- ALTERNATIVE CENTER FOR ELEMENTARY STUDENTS	Details PDF
<input type="checkbox"/>	10/04/2007 11:49:45 AM	LEARNER	TEX	55A02A262	ACES- ALTERNATIVE CENTER FOR ELEMENTARY STUDENTS	Details PDF
<input type="checkbox"/>	10/03/2007 02:21:33 PM	DOE	JOHN	55A03A495	ACES- ALTERNATIVE CENTER FOR ELEMENTARY STUDENTS	Details PDF
<input checked="" type="checkbox"/>	09/11/2007 04:30:12 PM	DOE	JANE	55A01A596	PEARCE H S	Details PDF

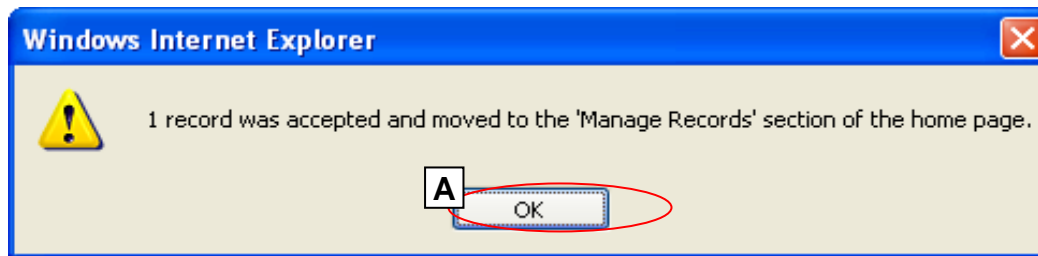
All times in local time zone

A **B** **C**

Accept Reject Done

A – Select the checkbox next to the student’s name that corresponds with the student that you want to download.
B – Select the *Accept* button.
C – If you decide not to *Accept* the student record, select the *Reject* button.


Step 2. After choosing to accept



A – After choosing to *accept* on the previous screen, a prompt appears stating that the record has been moved to the *Manage Records* section. Select the *OK* button to continue.

Select the *Done* button to return to the TREx homepage to proceed with receiving the request.

Step 3. Receiving a Record

Campus Registrar Trex | PEARCE H S Campus | Logout

First Name Last Name or Tracking #

Need Help?


Items Requiring Attention

		0	Int
		1	Int
		0	Re
		0	Re

A – Now that the record has been accepted, it is moved to the *Manage Records* section; select this link to begin the next step

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
- A** 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

Step 4. To download (.xml) data file



Kathryn O'Dell | REAGAN H S Campus | Logout

First Name Last Name OR Tracking #

[Need Help?](#)

Manage Records/Transcripts for REAGAN H S

Showing 1-5 of 5

<< << Page >> >>

Show

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	2 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"/>	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.

Delete

Upload

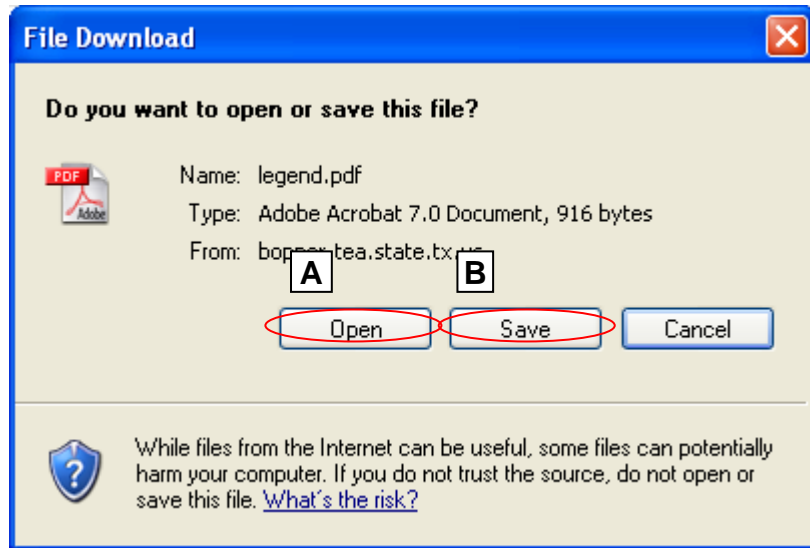
Create

Done

A – Locate the student that was just *Accepted* in the Manage Records page.

B – Select the *Download* link to either *View* or *Save* to your designated location the .xml student data file (see next slide).

Step 5. Open or Save (.xml) file



A – Select the *Open* button to view the .xml data file.

B – Select the *Save* button to save the .xml file. (Your computer will prompt you to identify the location where the student data file will be saved.)

TEA recommends that all FERPA requirements will be followed throughout the entire process of using TREx. This includes viewing or downloading any student data

Step 6. Logout of TREx

Campus Registrar Trex | PEARCE H S Campus **Logout** **A**

First Name Last Name Tracking #

A – Select the *Logout* link to end the TREx session.


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