

# Parchment Send User Guide



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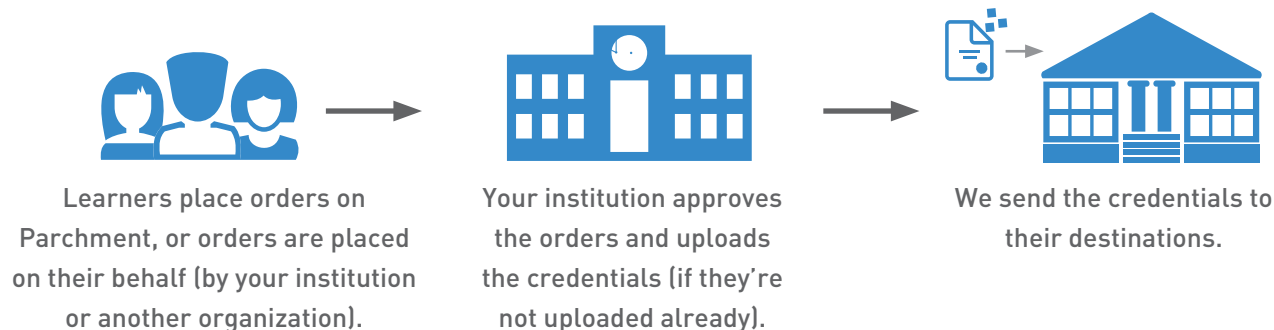
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# Introduction

Welcome to Parchment 7!

## HOW IT WORKS (IN A NUTSHELL):



## BUT THAT'S NOT ALL! WITH PARCHMENT 7, YOU CAN:

- Automate transcript requests with your Student Information System.
- Upload rosters and transcripts before your learners place orders, speeding up processing times.
- Allow learners, parents, and administrators to track orders every step of the way.
- Allow other organizations, such as verification companies, request credentials.
- Place requests on hold, so you can send transcripts after the next grading period.
- Cancel orders.
- Send documents electronically or on paper.
- Use registration codes (high school students only) to make it faster and easier for learners to register for Parchment.com accounts and request transcripts.
- Send other admissions documents, such as letters of recommendation, along with transcripts.
- Know that the PDF you send is the PDF that is delivered.
- Control the display, print, and forwarding permissions for each document you send.
- Track and report on the number and destinations of your requests.
- Control your eCommerce settings.

# Getting Started

Our recommendations in this **Getting Started** section may not apply if you get transcripts through a state database or integration with your SIS, or if you don't upload a roster.

The optimal way for transcripts to reach their destinations as quickly as possible is to prepare your account ahead of time, so that when your learners place orders, their transcripts can be delivered immediately.

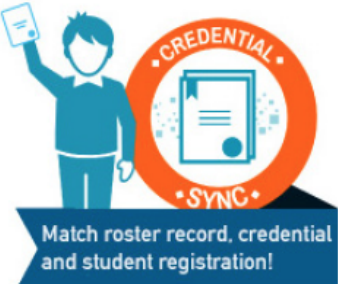
## A LITTLE BACKGROUND FIRST

When a learner places an order, their transcript must be associated/matched to their order before the transcript is sent out.

- If you upload a learner's transcript **after** the order is placed, the system will try to match the transcript with the order automatically. If it cannot do this, you will need to match the transcript and order manually (see our [Matching FAQ](#) for more information).
- If you follow our recommendations and upload the transcript **before** the order is placed, the matching process will have already taken place, greatly reducing the time it takes to fulfill orders.

## OUR RECOMMENDATIONS

We recommend that you upload your roster and transcripts **before** your learners place orders, so that by the time your learners place orders, their transcripts will be in place and ready to go. If you do not follow our recommendations, you can still fulfill orders, but the process takes a little longer.



- 1 **UPLOAD ROSTER AND SEND REGISTRATION CODES\***
- 2 **UPLOAD TRANSCRIPTS AND MATCH TO ROSTER RECORDS**
- 3 **MATCH PARCHMENT.COM REGISTRATIONS WITH ROSTER RECORDS**

## THREE EASY STEPS TO FULFILLING ORDERS IMMEDIATELY AFTER THEY ARE PLACED

Once you complete the steps above (instructions begin on the next page), you will have three key things in place and matched together – **roster record**, **transcript**, and the learner's **Parchment registration**. You can then enjoy near-immediate fulfillment after orders are placed, saving you a lot of time in the process.

\* [Registration codes are available for high school students only.](#)

## STEP 1: UPLOAD YOUR ROSTER AND SEND REGISTRATION CODES

In this first step, you will learn how to prepare your roster, upload your roster, and send registration codes. A registration code is available for high school students only. It allows a learner to register for a Parchment account quickly, and ensures that their account will match their roster record. Go to the [Registration Codes](#) section for more information.

- We recommend that you include your learners' email addresses in your roster, so that you can email registration codes. If you do not have email addresses for your learners, you can print invitation codes and hand them out.

### Prepare/create your roster

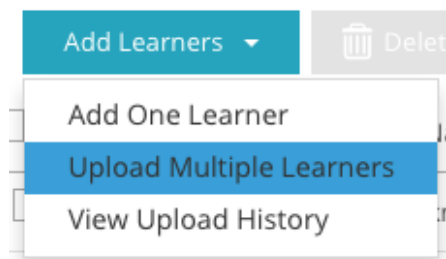
To create your roster, you can use the template we provide (instructions below), or you may want to use your Student Information System (where your transcripts are housed). If you need help generating a roster from your SIS, please refer to your SIS's Help Center.

Your roster must be saved as a .csv file, which you can do in Excel. It must include the following fields:

- First and last name
- Date of birth
- Learner ID
- Graduation/leave year

To create a roster using the template we provide:

1. Sign in to [Parchment](#).
2. Click **Learners**.
3. Click the **Add Learners** drop-down menu, and select **Upload Multiple Learners**.



4. Click the blue **CSV template** link. This will download a .csv file onto your computer. You can fill this in with your learners' information. Remember that you must include first and last name, date of birth, learner ID, and graduation/leave year.



### Upload your roster and send registration codes

Once your roster is in the correct format, you are ready to upload it.

1. Sign in to [Parchment](#).
2. Click **Learners**.
3. Click the **Add Learners** drop-down menu, and select **Upload Multiple Learners**.
4. The **Upload Student Roster** screen appears.

- If this is a new roster, you do not need to change the drop-down menu under **Roster Name** (it will say **Add New** like in the image above). You can then give your roster a name in the next text box. If you are replacing an existing roster, click the drop-down menu and select the existing roster.
    - If you upload an existing roster, you will be given the option to keep the existing roster records or replace them.
5. Now you need to upload the roster. You can:
    - Drag and drop your roster. You simply drag your roster file from your desktop (or wherever it is located on your computer) to the large gray box.
    - or
    - Click **Browse** to search for your roster. A box will open allowing you to search on your computer for the roster file. You can then upload it.
  6. Under **File Type**, keep **Comma Delimited** selected.
  7. Under **File Headers**, select if your roster file has headers. For example, if the top of each column in your roster spreadsheet says First name, Last name, etc, then keep the box selected **Yes**.
  8. Click **Continue**.
  9. You will get a screen showing if your roster was mapped successfully. There are five mandatory fields: first name, last name, learner ID, date of birth, and graduation year. After you upload your roster, the system will attempt to map each column in your roster to these fields. The next page explains how mapping works.



## UNDERSTANDING MAPPING

When you upload your roster, the system will try to identify and 'map' each of your columns.

In the example on the right, three of the columns have been 'mapped' (these three are shown in green). This means that the system was able to identify the columns that included the learner IDs, dates of birth, and graduation/leave years. It was unable to map the first name column and last name column.

In this case, you will need to map these last two columns manually.

You have mapped 3 of 5 required fields. ⓘ

Student First Name  
Student Last Name  
Student ID  
Date of Birth  
Graduation/Leave Year

File Column Header	< Sample Record >	Mapped Column (* indicates required mapping)
Student First Name	Jenny	Not Selected
Student Last Name	Jones	Not Selected
Student Id	46674	* Student ID
Graduation year	2015	* Graduation/Leave Year
Date of birth	1/2/98	* Date of Birth

## HOW TO MAP COLUMNS

If any columns are not mapped, you need to look at your headers under **File Column Header** on the left and compare it to the options selected under **Mapped Column** on the right, and see which ones do not match. Use the drop-down menus under **Mapped Column** to match any unmapped headers.

- **File Column Header** on the left shows the names of the column headers in your roster. If your roster does not have headers, it will show a series of numbers.
- **Sample Record**, the middle section, shows a sample row from your roster. You can use the left and right arrows to move through your records.
- **Mapped Column** on the right has drop-down menus with various options that you can select. What you select in the drop-down menus here must match the first column.

In the example on the right, all columns have been mapped. However, if you look at the red circle, you will notice that the last name and first name columns have been mapped incorrectly. In this example, you would click on both of these drop-down menus to select the correct options.

You have mapped 5 of 5 required fields. ⓘ

Student First Name  
Student Last Name  
Student ID  
Date of Birth  
Graduation/Leave Year

File Column Header	< Sample Record >	Mapped Column (* indicates required mapping)
Student First Name	Jenny	* Student Last Name
Student Last Name	Jones	* Student First Name
Student Id	46674	* Student ID
Graduation year	2015	* Graduation/Leave Year
Date of birth	1/2/98	* Date of Birth

10. Once you have matched all fields, click **Continue**.
11. You can now preview your roster.

**Preview**

Here is a preview of the Roster Students to be created or updated for Roster Name "My roster".

Keep Existing	Student	Date of Birth	Gender	Student ID	Registered Student	Grad Year	Errors
<input type="checkbox"/>	Jones , Jenny	1/2/1998		46674	<input checked="" type="checkbox"/> Jones, Jenny	2015	
<input type="checkbox"/>	Smith , Andy	1/3/1999		89033		2016	

☒ Send Registration Codes After Roster Is Processed

- **Keep Existing** column allows you to override an existing roster record. You can only check the **Keep Existing** box if the entry in the roster record matches or is similar to an existing roster record. You will not be able to check the box if you have uploaded new roster records.
- **Registered Student** column shows if this roster record matches a learner's Parchment.com registration, and if it does, it shows the name of the learner. If you see a learner's name here, like in the example above, you will also see a box that is checked next to the learner's name. If you uncheck the box, this learner's registration will no longer be matched to the roster record. This means that your school will be removed from their account.
- If you have email addresses in your roster, you should keep the box next to **Send Registration Codes After Roster is Processed** checked so that we can email your learners their registration codes.
  - For more information on registration codes, including how to print them instead of emailing them, go to the [Registration Codes](#) section.

12. Click **Continue**.



30 days before the start of your academic calendar, you will see an alert on the top right of your account reminding you to upload a new roster.

### Add a learner (not an entire roster)

You can add a learner without uploading an entire roster.

1. Sign in to [Parchment](#).
2. Click **Learners**.
3. Click the **Add Learners** drop-down menu, and select **Add One Learner**.
4. You can now enter the learner's information. You must enter the mandatory information, identified with asterisks (\*). You must also enter an email address if you want to place an order for this learner.

5. When you have filled in all the fields, click **Add Learner**.
6. The learner is now added to the roster. To send the learner a registration code, go to the [Registration Code section](#), and then come back here to proceed to step 2.

Add One Learner

Andrea

Middle Name

Smith

Name Suffix

Date of Birth \* ⓘ

01/01/2000

Grad/Leave Yr \* ⓘ

2018

Unique ID \* ⓘ

5555445

andreamsmith@parchmentuniversity.us

Gender

Add Learner & Order Credential

Add Learner

★ All items marked with an asterisk are required to submit this form.

## STEP 2: UPLOAD TRANSCRIPTS AND MATCH THEM WITH THE ROSTER RECORDS

In this step, you will upload your learners' transcripts and then match each one to the correct roster record.

You can upload transcripts in the way that suits your institution (for example, you can use the [Credentials Library](#) or the [Print Driver](#)). To make sure that the transcripts matched the roster records, go to the [Match Credentials](#) section.

## STEP 3: MATCH PARCHMENT.COM REGISTRATIONS WITH THE ROSTER RECORDS

In this final step, you will match your learners' Parchment.com registrations with their roster records (they may already be matched but you can confirm in this step). Your learners must have created Parchment.com accounts so that you can complete this final step. If they have not and if you are a high school, go to the [Registration Code section](#) for instructions on sending them registration codes, and then return here to complete this step.

Follow these instructions to match any unmatched registrations and to find out which learners have and have not registered.


1. Sign in to [Parchment](#).
2. Click **Learners**.
3. Click **Match Learner Accounts**.
  - When a learner creates a Parchment.com account, the system attempts to match their registration with a roster record. If the system is unable to match automatically, the learner's registration will be put 'On hold', and you will need to manually match their registration to a roster record.
4. This page is made up of two parts: unmatched registrations on the left side and roster records on the

right side. If you do not see anything listed on the left, you do not have to proceed further with this step because this means that you do not have any unmatched registrations.

**387 Learner Accounts**  
Information supplied by learners during registration

☐ **Smith, Little**  
DOB: 01/01/1995  
STUDENT ID:  
Email: little.smith@gatest.us

☐ **Smith, Jessica**  
DOB: 12/30/1999  
STUDENT ID:  
Email:

 **Match Learner**

Match a **Learner Account** with an **Official Record** by making a selection in each column and pressing the Match Learner button

**2838 Official Records**  
Learner records uploaded by an administrator

☐ **Kraus-Smith, Logan Harley**  
DOB: 05/06/1995  
STUDENT ID: 86321  
Email:

☐ **Smith, Alana Rae Jessica**  
DOB: 05/1995  
STUDENT ID: 84968  
Email:

To match unmatched registrations, look at the first unmatched registration on the left side and then look for the learner's roster record on the right side that matches it. Once you find it, click the radio button next to each name, and click **Match Learner**.

- The learners in the roster record on the right do not have registrations associated with them, so they are all available to choose from.
  - You may want to use the search box if you have a lot of unmatched registrations and roster records. In the image above, you will see that the name Smith was entered in the search boxes on the left side and the right side to help with matching.
5. If you do not see a match, click the radio button to the left of the learner's name and you can do one of two things:
- Click **Create Roster Record** to create a new learner roster record. When the learner's information appears, you can review and edit, if necessary. When you are ready, click **Submit** to create a roster record. This will automatically match the Parchment.com registration to the new roster record.
  - Click the trash can icon to remove your school from the learner's account. This will remove the unmatched registration from your account. Only do this if you are sure that the individual is not a current or former learner, bearing in mind that the individual may have had a name change.

☒ **Smith, Little**


DOB: 01/01/1995

STUDENT ID:

SSN:


[Create Roster Record](#)

# The Credentials Library

The **Credentials Library** is where documents reside after you upload/send/print them to Parchment. Once you've added credentials to the Credentials Library, you can:

- View the credentials and see when they were uploaded.
- See which credentials are matched to which learners, and which are not matched to any.
- Match, unmatch, and delete credentials.



Make sure you upload roster records **before** uploading transcripts to the Credentials Library, so that the system can attempt to match the transcripts to the roster records automatically (it cannot match automatically other way around). If it cannot match automatically, you can match manually in the **Match Credentials** tab, which is explained at the end of this section.

To access the **Credentials Library**:

1. Click **Credentials**. You will see the **Credentials Library** right away.

- Under **Credential Type**, you can see the type of credential, and you can click it to view it.
- Under **Detail**, you can see if a learner's roster record has been matched to the credential.
  - If the credential is matched to a learner, you will see the learner's name and a blue arrow at the end of the row. Click the arrow to expand it to see more detail.
  - If the credential is not matched to a learner's roster record, you will see a link that says **Unmatched**. You can match these credentials to roster records in the **Match Credential** tab.
- **Date Uploaded** shows the date and time the file was uploaded.
- To search for a credential, enter the information into the search field (for example, a learner's name or ID). This searches the contents of all the files in the library.
- To filter, click **Filter**. A window will open that allows you to select different filtering criteria: credential type, date uploaded, graduation/leave year, and if the credential is matched with a learner. Save your custom filters by creating your filter criteria and then clicking **Display & Save**. Saved filters will appear on the right, and can be deleted by clicking **X**.

## ADD CREDENTIALS

Before you add credentials, especially transcripts, you should add roster records, so that the transcripts can be matched to the roster records automatically. If the system cannot match them, you can match them manually in the [Match Credentials](#) tab.

You can add one credential or a batch. For example, if you have 20 transcripts in one file, you can upload them here and the system will divide them up and try to match each to a roster record. **If this does not work, try sending your batch through the [Print Driver](#).**



There are different ways you can add credentials. This section explains how to add credentials from within the Credentials Library. You can also add credentials using the Print Driver, SFTPs, APIs, or Infinite Campus integration.

To add credentials from the Credentials Library:

1. Click **Credentials**.
2. Click **Add Credentials**.



3. Select the type of credential from the drop-down menu.
4. Add the credential.
  - Drag and drop your credential. You simply drag your file from your desktop (or wherever it is located on your computer) to the large gray box.
  - or
  - Click **Browse** to search for your credential. A box will open allowing you to search on your computer for the roster file. You can then upload it.
5. Click **Done** when it has uploaded. You may not see the credential appear right away. If it does not appear after a reasonable amount of time, please contact us, or try sending through the [Print Driver](#).

## DELETE CREDENTIALS

1. Click **Credentials**.
2. Check the box next to the credential you want to delete and then click **Delete Selected**.



## UNMATCH CREDENTIALS

There may be times that you want to unmatched credentials (for example, if you have matched a learner's transcript with another learner accidentally).

1. Click **Credentials**.
2. Find the credential that you want to unmatched.
3. Click the blue sideways arrow on the right side to expand the box.
4. Click **Unmatch**.

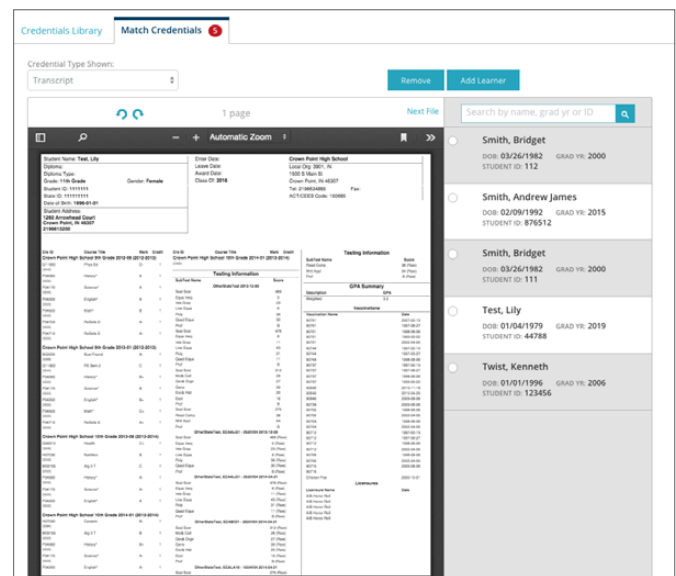
## MATCH CREDENTIALS

When you upload/print/send transcripts to Parchment, our system tries to match them to your roster records. If we cannot match a transcript (for example, the roster record does not exist or the information in the roster record does not match information on the transcript), the transcript will appear in the **Match Credentials** tab. To match transcripts with roster records manually:

1. Click **Credentials**.
2. Click **Match Credentials**. If there are unmatched credentials, you will see a number in a red circle.

3. You will see the first unmatched transcript on the left side and your roster records on the right side. Look at the unmatched transcript and try to find the learner who it belongs to on the right side. You can either search for the learner using the search box or you can scroll down to find the learner.

- Your learners that appear on the right side are all the learners in your roster. If you try to match a transcript to a learner who already has one attached, you will get a message asking if you would like to replace the existing transcript. If you do replace it, the transcript that was originally matched will remain in your Credentials Library, but it will not be matched to any learner.



4. Did you find the learner?
  - **Yes:** click the radio button next to the learner's name and then click **Match Credential**. If the learner already has a transcript attached, you will be asked if you would like to replace the existing transcript.
  - **No:** click **Add Learner** to create a roster record for the student.
  - If you do not do anything, the transcript will remain here. See next section: **Choose how long you would like unmatched credentials to remain in the library.**
5. Use the **Next** button to scroll through to the next transcript(s).

**CHOOSE HOW LONG YOU WOULD LIKE UNMATCHED CREDENTIALS TO REMAIN IN THE LIBRARY**

If a credential does not have a roster record attached to it, it is considered 'unmatched'. By default, the system discards these credentials after four days, but you can change this in your [Library Display Settings](#).



# The Print Driver

Many schools use our print driver to upload transcripts. The print driver can be used to:

- Upload transcripts to the Credentials Library before learners place orders, so that their transcripts are in the system and ready to go.
- Upload transcripts immediately after you approve the orders.

For instructions on how to install the Print Driver, [download the Print Driver user guide](#).

There are other ways you can upload transcripts. You can upload them directly from the [Credentials Library](#), which was explained in the previous section. You may also use SFTP or APIs. Whichever way you upload transcripts, they will all land in the Credentials Library. This section goes over the Print Driver.

## A FEW THINGS ABOUT THE PRINT DRIVER

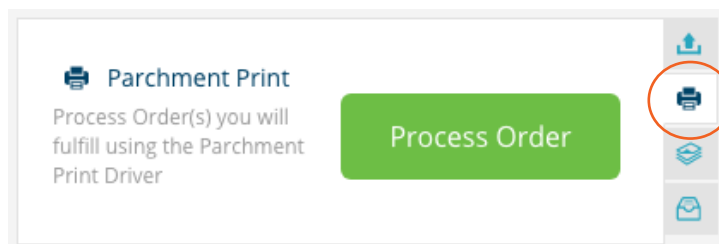
- Print each transcript only once. If you are printing a batch, make sure you print only once.
- Print one transcript per learner, regardless of how many destinations the transcript is being sent to.
- Before printing to the print driver, do not select **Shrink to fit** or **Fit to page**, and do not enable **Auto rotate** on the **Print Settings** window.
- If you use the Print Driver with Chrome or Firefox, [read the section below on browser settings](#).

## USE THE PRINT DRIVER TO UPLOAD TRANSCRIPTS TO THE CREDENTIALS LIBRARY

We strongly advise that you have roster records in place for the learners whose transcripts you want to add to the Credentials Library before printing to the Print Driver, so that the system can attempt to match the transcripts with the records automatically. If it cannot match, you can [match them manually](#).

## USE THE PRINT DRIVER TO FULFILL AN ORDER

1. Find the order in your **Open Orders**. Click the print symbol (see orange circle) to select Parchment Print.



2. Click **Process Order**.
3. Find the transcript and 'print' it to the Print Driver.

4. If the information on the order and transcript matches, the order should process fairly quickly. Check your **In Process** tab to make sure that the order went through.
  - If the order does not go through and remains in your In Process tab, this means that the transcript did not match the order. Click Reset Order and manually attach it from the Credentials Library.

In Process				
Learner Name (Last, First)	Order Date	Credential Ordered	Destination	Status
Carney, Faith Student ID: Date of Birth: 1998-05-06	7/10/2017	Transcript	Andres College	Processing

### BROWSER SETTINGS FOR WEB-BASED SIS

If you use the Print Driver with Chrome or Firefox, you must disable your Chrome or Firefox PDF Viewer to send batches of transcripts, and to allow the system to attempt to automatically match your transcripts to your learners' orders. Using Adobe Reader, rather than Chrome or Firefox, to preview files and print them will ensure the system can process your files correctly.

[Click here to install Adobe Reader for free.](#)

#### Disable PDF Viewer in Chrome

1. Open Chrome.
2. Type `chrome://plugins`
3. Click **Disable** under **Chrome PDF Viewer**.
4. Make sure you have Adobe Reader ([install for free](#)) or Adobe Acrobat installed.

#### Disable PDF Viewer in Firefox

1. Open Firefox.
2. Click **Firefox > Options > Applications**.
3. Click **Portable Document Format (PDF)**.
4. Under **Action**, change the default viewer from **Preview in Firefox** to **Adobe Reader**.
5. Make sure you have Adobe Reader ([install for free](#)) or Adobe Acrobat installed.

# Learners

The **Learners** tab is where you can:

- See all of the learners that you have added/uploaded.
- Add learners individually or add a roster with multiple learners.
- Add a credential to a learner's record.
- Send [registration codes](#) (high school learners only).
- Match unmatched Parchment.com accounts.
- Unmatch/delete transcripts.
- See which learners have registered for Parchment.com accounts.
- See details about previously uploaded rosters.

## TO ACCESS THE LEARNERS TAB:

1. Sign in to [Parchment](#).
2. Click **Learners**. Within the **Learners** tab are two or three tabs (depending on your school):
  - [Manage Learners](#)
  - [Invite Learners](#) (available to high schools only)
  - [Match Learner Accounts](#)

Manage Learners							
<a href="#">Add Learners</a>		<a href="#">Delete Selected</a>		Search by name, grad yr or ID		<a href="#">Filter</a>	
<input type="checkbox"/> All	Last Name	First Name	ID	Grad / Leave Yr	Parchment.com Account	Transcript	Other Credentials
<input type="checkbox"/>	Lange	Adam	123654	2016	NO	—	—
<input type="checkbox"/>	Music	Alex	52131	2015	<a href="#">i amusic@testing.om</a>	—	—
<input type="checkbox"/>	Langer	Cesar	125478	2016	<a href="#">i YES</a>	—	—

## MANAGE LEARNERS

In this tab, you can:

- Add learners individually or add a roster with multiple learners. For instructions on how to upload rosters and add individual learners, go to [Upload rosters](#) in the **Getting Started** section.
- View your roster upload history. Click **Add Learners** and select **View Upload History** to see the details of rosters that were uploaded, including the date they were uploaded and by whom. Click **View file** to see the actual file that was uploaded.

- See all of the learners that you have added/uploaded. You will see their first and last name, graduation/leave year, and Student ID. You will also see if they already have a Parchment.com account, and if they have a transcript or other credentials attached to their record.
- Click the blue arrow on the right to expand the box to perform certain actions for a particular learner.
  - If the learner does not have a Parchment.com account, you should encourage them to create one. If your institution is a high school, you can click the **Invite learner** link to email/print registration codes, so that students can register for Parchment.com accounts quickly. See Image 1 below. Go to the [Registration Codes](#) section for instructions on how to email/print registration codes.
  - To attach a transcript to a learner's record, you can upload one. You can click **Attach from the Credentials Library** (if you have a transcript in the [Credentials Library](#)), click **Upload New File** to add the transcript from your computer, or upload it another way, such as using the [Print Driver](#) or an API. It is helpful to have the learner's transcript here so that when this learner places an order, the transcript is in place and ready to go. See Image 1 below.
  - If a learner has a transcript attached already (see Image 2 below), click **Academic Transcript** to view it. Click **Unmatch** to unmatch it (for example, if you accidentally matched it to the wrong learner) or click the trash can icon to delete the transcript entirely. This will not delete the learner's record.




<input type="checkbox"/> All	Last Name ▾	First Name ▾	ID ▾	Grad / Leave Yr ▾	Parchment.com Account	Transcript	Other Credentials
<input type="checkbox"/>	Green	Aaron	82138	2012	NO	—	—
 Invite student to create an account  Attach from Credentials Library  Upload New File							

Image 1




 Academic Transcript	 Unmatch	
--	---	---

Image 2

## INVITE LEARNERS

In this tab, you can email/print registration codes for those learners who have not yet registered for Parchment.com accounts. Registration codes are available for high school learners only and help with the registration process. They are not mandatory. Go to the [Registration Codes](#) section for more details and instructions.

## MATCH LEARNER ACCOUNTS

In this tab, you can match your learners' Parchment.com accounts with their roster records, if a learner's registration did not match their roster record after they created an account. Go to the [Match accounts with roster records section](#) for more details and instructions.

# Fulfill orders

## TO DO TAB

**To Do** is where you view, manage, and fulfill orders. When you log in to your account, you will land on **To Do** right away and you will see three tabs:

- **Open Orders** - these are new orders that have not been actioned by your institution yet.
- **In Process** - these are orders that your institution has approved, but the orders have not processed yet. Some orders may only remain here for a few hours, and some may need to be reprocessed.
  - You can reset an order if it is stuck here. It will go back to your Open Orders.
  - If you approve an order and then print it to the Print Driver, the order will remain here for a short while and will then be processed (provided it matches the order).
- **On Hold** - these are orders that you or the learner placed on hold.

## A detailed look

The image below shows an open order, and explains some of the information you will see in an open order. The following pages explain how to fulfill open orders.

The screenshot shows the Parchment 'Open Orders' interface. At the top, there's a navigation bar with 'TO DO', 'HISTORY', 'LEARNERS', 'CREDENTIALS', 'ANALYTICS', and 'SETTINGS'. Below this, there are tabs for 'Open Orders', 'In Process', and 'On Hold'. The 'Open Orders' tab is active, showing a list of orders. The first order is for 'Test, Paul', dated 6/27/2017, with the credential 'Transcript' and destination 'Origami Test College'. The order status is 'Open'. To the right of the order list, there's a 'Web Upload' section with a 'Select File' button. Below the order list, there are three sections: 'LEARNER INFORMATION', 'ORDER INFORMATION', and 'OTHER ACTIONS'. The 'LEARNER INFORMATION' section shows the student's ID, date of birth, start year, graduation/leave year, and last 4 SSN. The 'ORDER INFORMATION' section shows the document ID 'T4Q4580F'. The 'OTHER ACTIONS' section includes 'Add Credential' and 'Cancel Request' buttons. Annotations explain the following elements:

- Delivery method:** This symbol means the order is being sent electronically. If it was being sent by mail, you would see an envelope icon.
- Place order on hold:** When you click this, you will see more order details.
- Document ID:** The Document ID is a reference number that is created once an order is placed. It can be used by you or the requestor to track the order.
- Cancel Request:** This cancels the order. After clicking this, you will select the reason you canceled the order.
- Other user icon:** This symbol means that someone other than the learner placed the order. Hover over it to see who placed the order.

parchment.com

### FULFILL ORDERS THAT HAVE MATCHED TO DOCUMENTS AUTOMATICALLY

When an order is received, the system looks at information in the order, including first name, last name, and date of birth, and tries to match the order to an existing learner record. If it is able to make a perfect match and the learner record has a transcript attached to it, you will see the green **Automatched** message. This doesn't mean that the order has been processed. You still need to do that. But it does mean that the order has been matched to a document.

To process an Automatched order, click the blue **File Date** link to view the file first so that you can double check that it is the correct document.

- If it is the correct document, click the green **Process Order** button, and the order will be processed.
- If it is not the correct document, click the blue **Remove Document** link. You will then need to manually match the order with the correct document.

The screenshot displays the Parchment interface for managing orders. At the top, there are tabs for 'Open Orders', 'In Process', and 'On Hold'. Below these is a search bar and a 'Filter' button. The main table lists orders with columns for 'Learner Name (Last, First)', 'Order Date', 'Credential Ordered', 'Destination', and 'Document Info'. A green 'Process All' button is located to the right of the table headers. The first order listed is for 'Bee, Kimmy', with an order date of '7/6/2017' and a credential of 'Transcript'. The destination is 'Origami Test Receiver'. In the 'Document Info' column, the status 'Automatched' is highlighted with a red circle. Below this status are two links: 'File Date: 7/6/2017' and 'Remove Document'. A green 'Process Order' button is located to the right of the 'Remove Document' link. The learner's details, including 'Student ID' and 'Date of Birth', are shown below the learner name.

Learner Name (Last, First)	Order Date	Credential Ordered	Destination	Document Info	
Bee, Kimmy Student ID: Date of Birth: 1998-09-25	7/6/2017	Transcript	Origami Test Receiver	Automatched File Date: 7/6/2017 Remove Document	Process Order

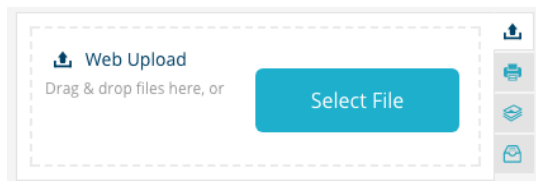
## FULFILL ORDERS THAT HAVE NOT MATCHED TO DOCUMENTS AUTOMATICALLY

Schools fulfill orders differently. Some may use the 'Print Driver' and others may use an API. The different options are explained below. Choose the method that your school uses. You may not see all options in your account.

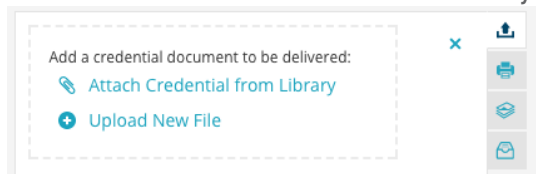
### Web Upload

**Web Upload** allows you to attach a document to the order by uploading the document directly from your computer, or attaching the document from the **Credentials Library**.

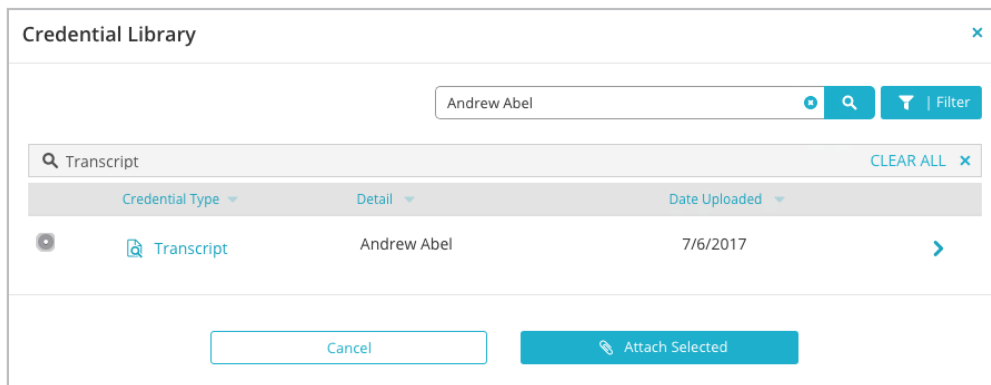
1. Click **Select File**.



2. Select either **Attach Credential from Library** or **Upload New File**.



- If you select **Attach Credential from Library**, you will get a screen like the one below. The learner's name will populate the search box so that you can easily find the correct document. Once you locate the correct document, click **Attach Selected**.



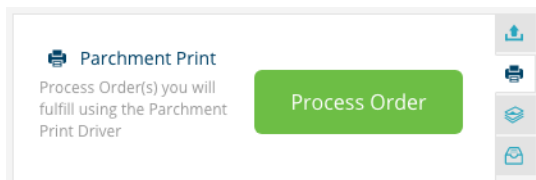
- If you click **Upload New File**, find the document on your computer and select it.
3. The document will be attached and you will see Manual Match. Click the blue File Date link to double check that it is the correct document. You can click **Remove Document** to remove the document. Otherwise, if it is the correct document, click **Process Order** and the order will be processed.



### Parchment Print

**Parchment Print** allows you to 'print' the transcript to our virtual print driver. This would have been set up on your computer with your institution's information ahead of time.

1. Click **Process Order**.

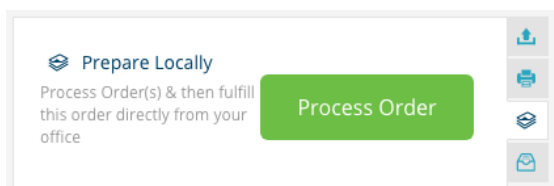


2. You now need to 'print' the transcript to the print driver. Go to the [Print Driver](#) section for more information.

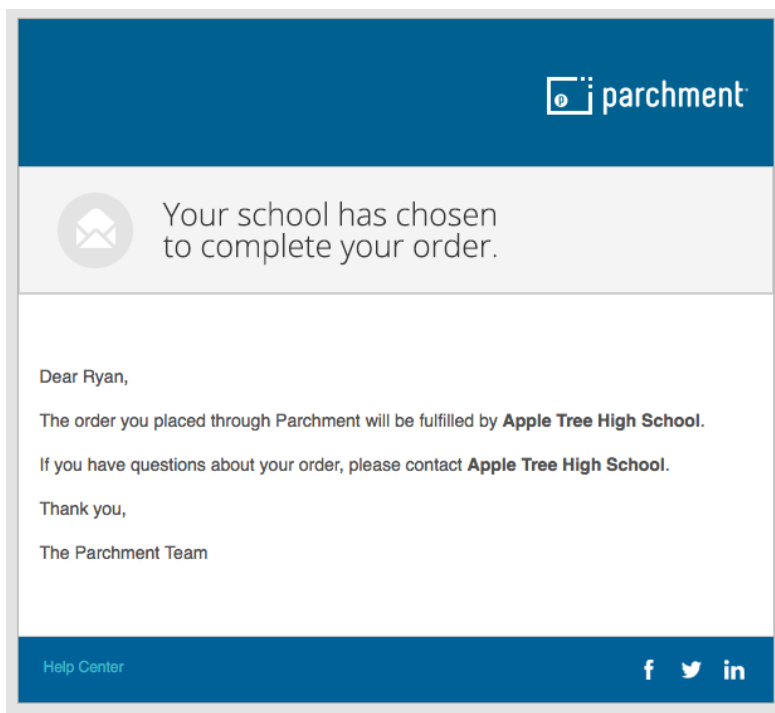
### Prepare Locally

**Prepare Locally** allows you to fulfill the order yourself at your school. Once you click **Prepare Locally**, the learner receives an email telling them that you will be sending the transcript to their destination.

1. Click **Process Order**.



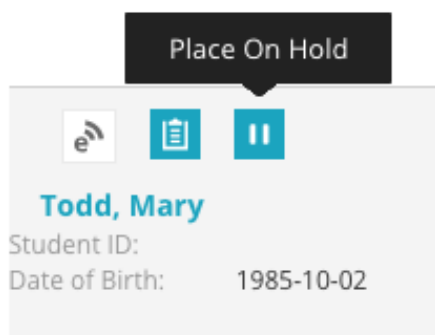
2. You can now prepare the transcript. Remember, the learner receives an email letting them know that you are doing this. This is what the email looks like:





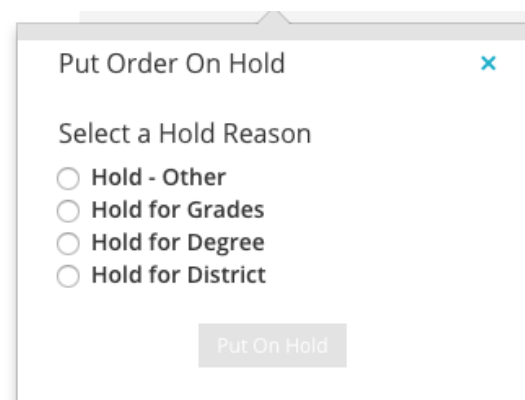
### PLACE AN ORDER ON HOLD

1. Click the pause button to place the order on hold.



2. Select a **Hold Reason**.

- **Hold - Other** allows you to type in a personalized message to the learner explaining why the request is being placed on hold. Any information entered here will be included in the email to the learner telling them the request has been placed on hold.
- **Hold for Grades** – use this to hold a transcript request until the next grades are posted.
- **Hold for Degree** – use this to hold a transcript request until the learner earns their degree.
- **Hold for District** – use this if the district will process the order.



3. The order will be placed in the **On Hold** tab. When you are ready to process it, go to the **On Hold** tab.

### PROCESS AN ORDER ON HOLD

1. Go to the **On Hold** tab.
2. Click **Remove Hold**.





3. This puts the order back in your Open Orders tab for you to process as normal.

### CANCEL AN ORDER

1. Hover over the order and click More.
2. Click **Cancel Request**.

3. Select the Cancellation Reason.

 **Confirm Cancellation** 

**REQUEST DETAILS**

Learner Name (Last, First)	Order Date	DID #	Credential	Destination
Abel, Andrew	7/6/2017	TQR6MJLM	School Report	● Origami Test College

**CANCELLATION REASON \***


Select A Reason ▼

Learner Not Found

Credential Not Available

Requested By Learner

Other

 [Back to To Do List](#)

**CANCEL THIS REQUEST**

All items marked with a red asterisk are required to submit this form

4. Click **Cancel this request**.

## In Process

The **In Process** tab is where you will find orders that have been approved, but have not yet been fulfilled.

Open Orders

**In Process**

On Hold

Search...

Filter

Learner Name (Last, First) ▼

Order Date ▼

Credential Ordered ▼

Destination ▼

Status ▼

**Bee, Kimmy**  
Student ID:  
Date of Birth: 1998-09-25

7/20/2017

Transcript

Origami Test Receiver

Processing

Reset Order

If an order has been in the In Process tab for more than a few hours and its status says **Processing**, this means that the order has not matched to a transcript in the system.

- If you use the Print Driver, make sure that you have printed the transcript to the Print Driver.
- Otherwise, click **Reset Order**. This moves the order back to your Open Orders, where you can try to process it again. If it still remains here, please contact our Support Team so that they can troubleshoot.

## Document requests

**Document Requests** is where you view and manage all requests other than transcript requests. This includes eSSRs (Guidance Report Requests), letters of recommendation, and school profiles. You will only see this tab if you have document requests waiting to be actioned.

To access **Document Requests**:

1. Sign in to [Parchment](#).
2. Click **Document Requests**.

You will see up to four tabs (depending on your settings, you may not see the **Guidance Report Requests** tab):

- All Requests
- Guidance Report Requests (eSSRs)
- Letter of Recommendation Requests
- School Profile Requests

On each tab, you will see these fields (not all fields may be populated):

- Student
  - Click on the individual's name to view more information about them, such as their email address and the last four digits of their social security number.
- Class of
- Transcript
- Document type
- College
  - Click on the college name to view more information about the college, including contact names.
- Date requested
- Action

### ESSRS (GUIDANCE REPORT REQUESTS)

In-network Receiver schools can request that electronic Secondary School Reports (eSSRs) accompany transcripts.

**You will receive these requests if you have subscribed to this service and if it is available in your state.** If you are interested in subscribing, please contact your Account Executive.

When a Guidance Report (eSSR) request comes through, you will see:

- The learner's transcript request in the **To Do** tab.
- A request for an eSSR in the **Document Requests** tab.

To fulfill requests for eSSRs:

1. Sign in to [Parchment](#).
2. Click **Document Requests**.
3. Click **Guidance Report Requests**.
4. Click **Complete eSSR** under **Action** for the learner whose eSSR you want to fulfill.
5. On the next screen, you will fill in all the requested fields. These are the fields that the colleges have asked to be filled in. However, they are not mandatory. Schools can select which fields they would like completed, so you may not see all of these:
  - Learner information
  - Current courses
  - Diploma type
  - Enrollment information
  - Class rank
  - Cumulative GPA
  - Course selection
  - SEVIS (Learner and exchange visitor information system)
  - Learner ratings by category
  - Evaluation
  - Supplemental information
  - School information
  - Counselor information
6. Confirm that the information you are providing is accurate.
7. Click **Save & Continue** or click **Save Go Back** if you don't want to submit the information yet.

#### **Cancel an eSSR request**

1. Sign in to [Parchment](#).

2. Click **Document Requests**.
3. Click **Delete**, which you'll find next to the name of the college.

#### LETTER OF RECOMMENDATION REQUESTS

1. Sign in to [Parchment](#).
2. Click **Document Requests**.
3. Click **Letter of Recommendation Requests**.
4. You can now upload the document or prepare it locally (see red circle below).
5. Make your selection and click **Submit**.
6. If you selected to upload the document, you will land at the **Process Document Requests** page. Click **Parchment Exchange Web Upload** to upload the document.

#### SCHOOL PROFILE REQUESTS

1. Sign in to [Parchment](#).
2. Click **Document Requests**.
3. Click **School Profile Requests**.
4. You can now select to upload the document or prepare it locally under **Actions**. Make your selection and click **Submit**.
5. If you selected to upload the document, you will land at the **Process Document Requests** page. Click **Parchment Exchange Web Upload** to upload the document.

# History

**History** is where you can search all of your orders (including those that have not been fulfilled and those that have been cancelled), and find the status of an order. If a document was uploaded within the last 90 days, you can click the **DID#** to view it. You can search by:

- Student's first and last name
- DID#
- Document type
- Document status
- Receiver
- Date requested, date approved, and date delivered
- Class of <year>

First Name <input type="text"/>	Last Name <input type="text"/>	DID# <input type="text"/>	<a href="#">Advanced Search</a> ▼
Document Type <input type="text"/>	Document Status <input type="text"/>	Receiver <input type="text"/>	
Date Requested <input type="text"/> to <input type="text"/>	Date Approved <input type="text"/> to <input type="text"/>	Date Delivered <input type="text"/> to <input type="text"/>	
Class Of <input type="text"/>		<input type="button" value="Search"/>	<a href="#">Clear All</a>

## SEARCH FOR AN ORDER

1. Sign in to [Parchment](#).
2. Click **History**.
3. Fill in the fields that you would like to search and click **Search**.
  - If a document was uploaded within the last 90 days, you can click the **DID#** to view it and you can also download it.
  - To export to Excel, click **Export report to Excel**.

Student Name	Date Requested	Date Delivered	Document Type	DID#	Receiver	Document Status
Jones, Jenny (Student)	06/19/2015	06/19/2015	Transcript	TR3JUPN	Jenny Jones	Complete: Download Confirmed
Jones, Jennifer (Student)	06/18/2015		Transcript	TR3JYKN	Unofficial Self View - No Fee	Complete: Delivered to Parchment

# Registration codes (available to high school learners only)

You will not have access to registration codes if you are a higher education institution.

Registration codes help speed up the registration process for learners. When your learners register for a Parchment.com account using a registration code, they do not have to enter any of the information that you already provided in the roster, such as their name and date of birth.

A registration code also ensures that the learner’s roster record automatically matches their Parchment.com registration.

You can print or email registration codes.

## REGISTRATION DATA TABLE

The registration data table (see example on right), shows how many learners have and have not registered for Parchment.com accounts, and shows them by graduation year. To access, click **Learners > Invite Learners**. You can click on the blue numbers to get a list of those learners. This is handy if you only want to invite seniors to register, for example. You would click the number **29** in the **Class of 2017** row to see who these learners are, and then you would generate registration codes for those learners specifically.

Registration Data

View registrations by class. Click a value to see the list of learners.

Class	Number of Learners	Registered	Unregistered
Total	653	29	624
2015	583	23	560
2016	39	4	35
2017	31	2	29
2018	0	0	0
Alumni	2302	88	2214

## GENERATE REGISTRATION CODES

You can generate registration codes two ways:

- When you upload a roster, you can email registration codes during this process. Go to the [Upload roster and send invitation codes section](#) for instructions.
- If you already added learners, follow the instructions below to print or email registration codes.

### Email registration codes

You can only email registration codes if you included learners’ email addresses when you added them.

- If you do not have email addresses, you should [Print registration codes](#).
- If you want to use the **Registration Data Table** (see section above) to help you decide who to invite, select the applicable number in the **Unregistered** column and then skip to **step 6** below.

1. Sign in to [Parchment](#).
2. Click **Learners**.
3. Click **Invite Learners**.



4. Click **Email Registration Codes**.
5. Select the applicable learners by checking or unchecking the box(es) under the **Checked** column.
6. Click **Email Registration Codes**.
7. Under **Customize Email**, you can:
  - Add a custom message.
  - Select if you would like the system to send the email up to four times if the learner does not register. Simply check or uncheck the box next to **Automatically attempt up to 4 emails for unregistered learners**.
8. Click **Email these <number> learners now**.

### Print registration codes

If you want to use the [Registration Data Table](#) to help you decide who to invite, select the number in the **Unregistered** column that you'd like to invite and then skip to **step 6** below.

1. Sign in to [Parchment](#).
2. Click **Learners**.
3. Click **Invite Learners**.
4. Click **Print Registration Codes**.
5. Select the learners who you want to receive invitation codes by checking or unchecking the box(es) under the **Checked** column.
6. Click **Print Registration Codes**.
7. You will see what the handout will look like on the left side. Under **Customize Handout** on the right side, you can:
  - Select whether you'd like additional Parchment.com features explained in the handout.
  - Add a custom message.
8. Click **Print handouts for these <number> learners now**.
  - Printed handouts will be sorted by last name (A to Z).

### Customize email

In addition to sending transcripts, Parchment.com offers free features such as detailed college information and a community discussion area. You can choose whether or not this is featured in the email you send to your students.

- ☒ **Explain these features**  
☐ **Do not explain these features**

#### Add a custom message:

Hello, this is your counselor, Please register as soon as possible.

#### This email will be sent from

registration\_codes@parchment.com

☒ **Automatically attempt up to 4 emails for unregistered students**

**Email these 103 students now**

## Order transcripts/other documents for learners

When a current or former learner wants to send their transcript or another document to a college or any other destination, you can do this for them on their behalf. If the learner already has an order sitting in your Open Orders, go to the next section, **Send Additional Documents**.

A few things first:

- You will need a credit or debit card if you are prompted to make a payment for the order.
- By default, all requests will be auto-approved, which means you will not see them in the **To Do** tab. However, **if you do not want requests to be auto-approved** (for example, you want to place orders but approve them at a later date), you can do this by changing the [Auto-approval setting](#).
- An administrator must have a **Sender** role to access the **Order** feature. To add this role to an existing administrator's profile, the Site Administrator needs to:
  - a. Sign in to [Parchment](#).
  - b. Click **Settings > Users**.
  - c. Click the name of the administrator.
  - d. Check the box next to **Sender**.
  - e. Click **Save**.

### IF THE LEARNER IS ALREADY IN YOUR ROSTER (IN YOUR PARCHMENT ACCOUNT)

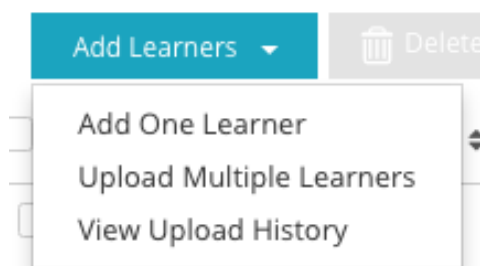
1. Click **Learners**.
2. Click the learner's name.
3. Click **Order Credential**, and then follow the steps to continue placing the order.

**Update Learner**

<b>First Name*</b>	<b>Middle Name</b>
<input type="text" value="Andrew"/>	<input type="text"/>
<b>Last Name*</b>	<b>Suffix</b>
<input type="text" value="Abels"/>	<input type="text"/>
<b>Gender</b>	<b>Date of Birth*</b>
<input type="text" value="Gender"/>	<input type="text" value="Jan"/>
	<input type="text" value="5"/>
	<input type="text" value="2001"/>
<b>Unique Student ID*</b>	<b>Graduation/Leave Year*</b>
<input type="text" value="637884"/>	<input type="text" value="2018"/>
<b>Email Address</b>	
<input type="text" value="aabels1@parchmentur"/>	

**IF THE LEARNER IS NOT IN YOUR ROSTER (IN YOUR PARCHMENT ACCOUNT)**

1. Click **Learners**.



2. Enter the learner's information.

A screenshot of the 'Add One Learner' form. The form has a title bar with 'Add One Learner' and a close button. It contains several input fields: 'First Name' (Joe), 'Middle Name' (empty), 'Last Name' (Anderson), 'Name Suffix' (empty), 'Date of Birth \*' (01/01/2000), 'Grad/Leave Yr \*' (2018), 'Unique ID \*' (555555), and 'Email' (joeanderson@parchmenthighschool.com). There are also dropdown menus for 'Gender' and 'Name Suffix'. At the bottom, there are two buttons: 'Add Learner & Order Credential' (blue) and 'Add Learner' (green). A note at the bottom states: '\* All items marked with an asterisk are required to submit this form.'

3. Click **Add Learner & Order Credential**, and follow the steps to place the order. The learner will be added to your roster.

## Send additional documents

If you have an open order sitting in your Open Orders tab, use the **Add Credentials** button to send other documents to the same destination for that learner. If you do not have an open order and you want to place an order for a learner, go to the previous section, **Order transcripts/other documents for learners**.

- You can only send documents to destinations that receive documents electronically. We do not print additional documents.

To send additional documents:

1. Sign in to [Parchment](#).
2. Find the learner's order and click More.

The screenshot shows the 'Open Orders' tab in the Parchment interface. At the top, there are tabs for 'Open Orders', 'In Process', and 'On Hold'. Below these is a search bar and a 'Filter' button. A table lists orders with columns: 'Learner Name (Last, First)', 'Order Date', 'Credential Ordered', 'Destination', and 'Document Info'. The first row shows an order for 'Test, Megan' on '7/18/2017' for a 'Transcript' from 'Kimber Credentials'. Below the order details, there is a 'More' button with a dropdown arrow, which is circled in red. To the right of the order is a 'Web Upload' section with a 'Select File' button.

3. Click **Add Credential**.

This screenshot shows the same order as the previous one, but with the 'More' button clicked. A dropdown menu is visible with the 'Add Credential' button circled in red. Below the order details, there is a 'Web Upload' section with a 'Select File' button. At the bottom, there is a section with three tabs: 'LEARNER INFORMATION', 'ORDER INFORMATION', and 'OTHER ACTIONS'. The 'LEARNER INFORMATION' tab is selected, showing details for 'Test, Megan'. The 'ORDER INFORMATION' tab shows the 'Document ID: T4QOJLAK'. The 'OTHER ACTIONS' tab shows the 'Add Credential' button circled in red, along with a 'Cancel Request' button.

4. Follow the steps to place the order.

# Settings

Settings is where you manage many components of your account, from selecting your grading system to choosing how long you would like unmatched credentials to remain in the **Credentials Library**.

- [General](#)
- [To Do](#)
- [History](#)
- [Learners](#)
- [Credentials](#)
- [Integration](#)
- [Ordering](#)
- [Pricing](#)
- [Users](#)

## GENERAL

### Account profile

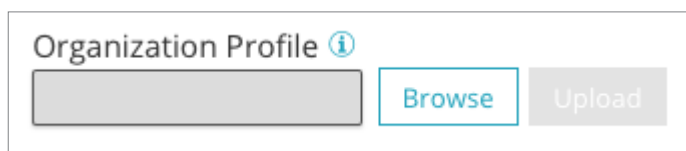
This is where you edit your institution's information, such as address and website, and upload a PDF of your institution's profile. You can also find your Member ID on this page.

Access your Account Profile settings:

1. Sign in to [Parchment](#).
2. Click **Settings** > **General** > **Account Profile**.

Upload a PDF of your institution's profile

1. Sign in to [Parchment](#).
2. Click **Settings** > **General** > **Account Profile**.
3. Under Organization Profile, click **Browse**.



Organization Profile ⓘ

[Browse](#) [Upload](#)

4. Select the PDF and click **Upload**.
5. Click **Save**.

### Grading system

This is where you select your grading system (how many grading periods you have per year) and your grading period calendar (academic year or calendar year).

To edit your grading system and grading period calendar:

1. Sign in to [Parchment](#).
2. Click **Settings** > **General** > **Grading System**.
3. Under **Grading System and Grading Periods**, select the applicable options from the drop-down menus.
4. Click **Submit**.
5. Directly below this section, you will see another section called **Grading Periods**, where you can select the dates that grades will be posted for your grading periods. Select the applicable options from the drop-down menus.
6. Click **Save**.

The screenshot shows the 'Grading System' tab in the Parchment settings. At the top, there are two tabs: 'Account Profile' and 'Grading System'. Below the tabs, the section is titled 'Grading System and Grading Periods' with an information icon. It contains three fields: '\* Grading System:' with a dropdown menu set to 'Year - 1 grading period per year', '\* Grading Period Calendar:' with a dropdown menu set to 'Other (please specify)', and '\* Start Month' with a dropdown menu set to 'Jan'. A green 'Submit' button is located below these fields. Below the 'Submit' button is a section titled 'Grading Periods' with a descriptive paragraph: 'Select the estimated dates grades will be posted for your Annual Term. The grading periods will be set for the period Jan 2015 - Dec 2015 and will automatically be updated for each subsequent year.' This section contains a field for '\* Annual Term' with a dropdown menu set to 'Dec' and a text input field containing the number '1'. A green 'Save' button is located at the bottom right of the form.

### TO DO

The **To Do** setting has two tabs: **Order Approval** and **Queue Assignments**.

#### Order approval

The **Order approval** tab is where you:

- Select the year that your electronic records began.
- Choose if you want to auto-approve administrator-initiated orders (these are orders you place on behalf of a learner).

- Review alumni approval settings.

### Availability of Electronic Records

If a learner graduated before the date you select here, they can only request a paper transcript. **You will still receive these requests electronically in the usual way, but you will see the Hold and Prepare Locally options only.**

To select the year that electronic records began:

1. Sign in to [Parchment](#).
2. Click **Settings > To Do > Order Approval**.
3. Under **Availability of Electronic Records**, select the year from the drop-down menu.
  - You can also check the box next to **Allow alumni before electronic records available to request transcripts for international addresses**.

### Availability of Electronic Records

Indicate the earliest year for which electronic records are available. Parchment Exchange cannot deliver transcripts for alumni who graduated or left your school before the selected year, but you will receive their transcript requests electronically.

\* Electronic Records Begin: 1999 ▾

☐ Allow alumni before electronic records available to request transcripts for international addresses.

4. Click **Save**.

### Auto Approve SAIR Generated Requests

SAIR stands for Send Administrator Initiated Requests. These are orders you place on behalf of learners. You can select whether these orders are automatically approved, or appear on the **To Do** tab for future action. By default, these requests will be approved.

To change the auto-approval settings for these orders:

1. Sign in to [Parchment](#).
2. Click **Settings > To Do > Order Approval**.
3. Under **Auto Approve SAIR Generated Requests**, select **Yes** if you would like these approved automatically, or **No** if you'd like them to appear on the **To Do** tab.

### Transcript approval settings

These settings allow you to define a preferred method for handling approvals for alumni transcript orders. You can choose to approve each alumni request manually, or only the first alumni request.

1. Sign in to [Parchment](#).
2. Click **Settings > To Do > Order Approval**.

3. Under **Transcript Approval Settings**, select approval options for alumni transcript requests.
  - **Request Approval** – each alumni request requires manual approval.
  - **Alumni Approval** – only the first alumni request requires manual approval. The first time a student places a request after they have graduated, we will store the transcript to fulfill all subsequent requests, without you having to take any additional action.
  - **Auto-approval** - you must have a transcript matched to a roster record for orders to be auto approved. If you have this selected and a transcript does not exist in the system, these orders will land in your **Open Orders** tab..

## QUEUE ASSIGNMENTS

This section allows you to assign which administrators will be responsible for approving and processing certain requests. You can select:

- **Alphabetical** - this allows you to select which administrators will see requestors with certain last names (beginning A through L, for example) that have transcript or document requests.
- **Learner Type** - this allows you to select which administrators will see current and which will see former learners that have transcript or document requests waiting.
- **No queue assignment** - this means that all administrators who are set up as **Primary Senders** will receive emails telling them that their institution has pending requests.

To access Queue Assignments:

1. Sign in to **Parchment**.
2. Click **Settings > To Do > Queue Assignments**.
3. You will see **Transcript Request Queue** and **Document Request Queue**. The following instructions apply to both.
  - To set queue assignments alphabetically:
    - a. Click the radio button next to **Alphabetical**. You must assign at least one administrator to each letter in the alphabet.
    - b. Under **Administrator**, click add row.
    - c. Select an administrator from the drop-down menu.
    - d. Under **Alphabetical Assignment**, enter the range of letters that you would like this administrator to manage. For example, you could enter A to L, or A to Mc.
  - To set queue assignments by learner type:
    - a. Click the radio button next to **Student Type**. You must assign at least one administrator to each student type.



- b. Under Administrator, click add row.
- c. Select an administrator from the drop-down menu.

## HISTORY

These settings allow you to change your Credentials Library settings.

### Document Retention

By default, the system will delete documents in your library after 12 years. You can change this here for current and alumni learners.

1. Sign in to [Parchment](#).
2. Click **Settings > History**.
3. Make your changes and click **Save**.

**Document Retention** ⓘ

Document Retention	Alumni Students
<input type="radio"/> Never Expire Documents	<input type="radio"/> Never Expire Documents
<input checked="" type="radio"/> Documents are Deleted <input type="text" value="12"/> <input type="text" value="Years"/> after Upload	<input checked="" type="radio"/> Documents are Deleted <input type="text" value="12"/> <input type="text" value="Years"/> after Upload

### Library Display

These settings allow you to select how long you would like **unmatched** credentials to reside in the Credentials Library. By default, the system will remove unmatched credentials after four days.

1. Sign in to [Parchment.com](#).
2. Click **Settings > History**.
3. Under **Library Display**, select when you would like your unmatched credentials to be removed.

### Automatic Roster Record Generation

This setting will not apply to you if you upload transcripts from the Credentials Library or the Print Driver.

If you use an API to send transcripts, keep this selected **Yes**, so that the system automatically creates roster records.

## LEARNERS

Only K12 schools will see this setting. This is where you manage your registration code settings.

1. Sign in to [Parchment.com](#).
2. Click **Settings > Learners**.

- Under **Email Send Date**, select which date you would like to email registration codes to the students in your roster record.

3. When you are ready, click **Save**.

## CREDENTIALS

The Credentials settings allow you to set which credentials you would like your learners and third parties to have the ability to order.

1. Click **Settings > Credentials**.
2. Find the credential type that you want to edit and click blue arrow on the right side.
3. To allow learners and/or third parties to order the credential that you selected, click the drop-down menu under each heading and select **On**. Underneath the **Status** column, **Enabled** must be selected. In the example below, learners can order letters of recommendation but third parties cannot.

Credential Name	Credential Type	Status ⓘ	Learner/Parent Ordering ⓘ	Third Party Ordering ⓘ
Letter of Recommendation	Letter of Recommendation	ENABLED ▾	ON ▾	OFF ▾

## INTEGRATION

Our system is integrated with the Common Application. If any of your counselors use the online forms to submit Secondary School Reports, Midyear Reports, and Final Reports, you can turn on the **Common Application Online Forms Integration** in this section.

To access **Common App Settings**:

1. Sign in to [Parchment](#).
2. Click **Settings > Integration**.
3. Select if you would like to turn the Common Application Online Forms Integration on or off.

## ORDERING

The Ordering setting has four tabs: Ordering Setup, Messaging, Office Closure, and SSO Settings.

### Ordering Setup

#### Add a logo

When you add your school's logo here, your students will see it when they place orders. For more advanced styling features, go to the [next section on Advanced Styling](#).

1. Sign in to [Parchment](#).
2. Click **Settings > Ordering > Ordering Setup**.

3. Click **Browse** and select your image from your computer, or drag your image to the gray box.
  - The image must be 400 pixels x 400 pixels, and it must be a gif, jpeg or png file.
4. Click **Upload files**.
  - To remove the file, click the trash can icon.

### Set your return URL

After a student places an order, they will be presented with a **Done** button. When they click **Done**, they can go to your school's home page. To set this up, follow the instructions below. If you do not make any changes here, your students will go to Parchment.com after clicking **Done**.

To set your return URL:

1. Sign in to [Parchment](#).
2. Click **Settings**.
3. Click **Ordering**.
4. Click **Ordering setup**.
5. Click **Return URL**.
6. Enter your school's home page URL in the box and click **Save**.

### Consent settings

Learners must provide consent when they request transcripts from your institution.

Consent

Configure the setting for the collection of consent when learners request from your institution.

☒ Collect once with first order

☐ Collect with each order

☐ Do not collect consent

You can choose from three Consent options:

- **Collect once with first order**
  - This is the default. This means that your learners provide consent the first time they place an order. For any orders placed after the first order, learners will still get a **Provide Consent** screen, but the message will say **<School name> collects consent once when it is added to your Parchment account. You authorized Parchment to release your academic credentials from <School name> on <date>.**
- **Collect with each order**
  - This means that learners must provide consent each time they place an order. They will need to provide their signature on the **Provide Consent** screen each time.

- **Do not collect consent**
  - Only select this option if your learners have already provided consent and you have their consent on file at your institution.

To manage your Consent settings:

1. Sign in to [Parchment](#).
2. Click **Settings**.
3. Click **Ordering**.
4. Under the **Ordering Setup** tab, you will see the **Consent** settings. Make your selection:
  - Collect once with first order
  - Collect with each order
  - Do not collect consent

**Access the link/button that goes to your registration and ordering page (also called OrderLink)**

Your students can register for a Parchment account in different ways. They can:

- Go to [Parchment.com](#) and click **Log in**.
- Use a registration code (if your school uses them).
- Go to your registration and ordering page. This page is already set up for you. To access the link and button that takes you to the page:
  - a. Sign in to [Parchment](#).
  - b. Click **Settings**.
  - c. Click **Ordering**.
  - d. Under the **Ordering Setup** tab, you will see **Link to Parchment from your Website!** where you can access the link, the button (html code) and the text link (html code).

### Advanced Styling

Parchment's advanced styling feature allows you to customize your school's ordering pages by adding your school's logo and color schemes to the ordering workflow. This helps give your students a seamless ordering experience when placing requests for their credentials.

#### Important information

- Only site administrators can access the advanced styling settings.
- Students will not see any advanced styling if they sign in by going directly to [Parchment.com](#) and entering their user name and password. They will see it when they click your [OrderLink](#).

### Step 1: Add your logo

Make sure your logo is the correct size and format.

- Maximum height = 80 pixels
- Maximum width = 1100 pixels
- Format must be jpg, gif, or png. If your logo has a transparent background, you may want to save it as a png file so that the background remains transparent when it is placed on the header.

#### To add your school's logo:

1. Sign in to [Parchment](#).
2. Click **Settings > Ordering > Advanced styling**.
3. Make sure the box next to **Enable Advanced Styling Options** is checked.
4. Add your logo by dragging it to the gray box, or clicking **Browse** and then selecting the logo.
  - To remove the logo, click the trash can icon. Click **Reset** to undo this action.
5. Click **Save** and go to step 2 to add/change your color scheme.

### Step 2: Add your color scheme

You have six color schemes to choose from, or you can create your own. Each color scheme has a different color for the:

- Header
- Footer
- Some of the text (including the footer text)

To add a color scheme:

1. Sign in to [Parchment](#).
2. Click **Settings > Ordering > Advanced styling**.
3. Click the drop-down menu under **Base Color Scheme**.
4. Choose one of the six themes and then click **Save**.

To create your own scheme:

1. Sign in to [Parchment](#).
2. Click **Settings > Ordering > Advanced styling**.

3. Click the drop-down menu under **Base Color Scheme**.
4. Select **Custom**.
5. Under each heading, either enter the 'hex value' (for example #ffffff), or click the colored square and then select the color that you want.
6. Click **Save** and the new branding will be applied.

### Messaging

The Messaging setting allows you to enter a welcome message and an ordering message.

To enter a welcome message that your learners and alumni will see when they log in:

1. Sign in to [Parchment](#).
2. Click **Settings > Ordering > Messaging**.
3. Enter the welcome message in the box next to **Welcome message**.
4. Click **Save**.

To enter an ordering message that students see when they place an order:

1. Sign in to [Parchment](#).
2. Click **Settings > Ordering > Messaging**.
3. Enter the ordering message in the box next to **Ordering message**.
4. Click **Save**.

### Office Closure

If your office is going to be closed, you can set up an 'out of office'. Simply select the dates that your office will be closed. This will be seen by student when they add your school to their account.

To set up an out-of-office message:

1. Sign in to [Parchment](#).
2. Click **Settings > Ordering > Office Closure**.
3. Select the dates that you will be closed and enter a message for your students.
4. Click **Save**.
  - To cancel, click **Cancel this closure**.

### PRICING

This is where you can add a surcharge and set your fee waivers.

### Surcharges

We will collect surcharges on your behalf. We will then pay you the fees quarterly once we have collected at least \$500.

### Fee Waivers

Fee waivers allow learners to order transcripts for free. The number of fee waivers we provide varies by state. To qualify, the learner must have qualified for and received a fee waiver from the College Board or ACT.

A few things about fee waivers:

- Once you have assigned a fee waiver for a specific learner, their account will update to receive the set amount of free transcripts.
- A learner may only have a fee waiver assigned to them once.
- Learners must have a Parchment.com account before a fee waiver can be assigned.

## USERS

You can manage administrators and their roles/responsibilities in **Users** settings.

### Add an administrator

1. Sign in to [Parchment](#).
2. Click **Settings > Users**.
3. Click **Add New Administrator**.
4. Fill in the fields in the **Personal Information** box. Fields with a \* (asterisk) are mandatory.
  - There is a 36-character limit for the **Administrator Position** field.
5. Assign **Roles & Responsibilities**.
6. Click **Save**.

### Edit an administrator's information and roles/responsibilities

1. Sign in to [Parchment](#).
2. Click **Settings > Users**.
3. Click the name of the Administrator.
4. Edit the **Personal Information** and/or **Roles & Responsibilities** for this administrator.
  - There is a 36-character limit for the **Administrator Position** field.
5. Click **Save**.

### Delete an administrator

1. Sign in to [Parchment](#).
2. Click **Settings > Users**.
3. Check the box to the left of the Administrator you'd like to delete.
4. Click **Delete Administrator**.
5. A pop-up message will appear to confirm. Click **Confirm**.

### Roles and Responsibilities

Each Role and Responsibility can be assigned to more than one administrator.

- **General Administrator** - this role can view the directory of schools and colleges, and use the History section. Their settings can be changed to view transaction history or transaction history and document data.
- **Sender** - This setting allows an administrator to view data and process requests. The admin can be a Primary Sender, so they will receive emails when an order is in the **To Do** tab. Or they can be a Backup Sender, so they will receive escalation emails if the Primary Sender(s) is unavailable.
  - **The Primary Sender** receives an email when an order has been in **To Do** for 24 hours.
  - **The Backup Sender** receives an email when an order has been in **To Do** for 48 hours.
- **Advisor** - This setting allows an administrator to process requests for other documents, such as letters of recommendation and school profiles. They can be a Primary Advisor, so they will receive emails when a request comes in. Or they can be a Backup Primary Advisor, so they will receive escalation emails if the Primary Advisor(s) is unavailable.
  - **The Primary Advisor** receives an email when a request has been in **To Do** for 24 hours.
  - **The Backup Advisor** receives an email when a request has been in **To Do** for 48 hours.
- **IT/Webmaster** - this role receives emails about software installation. You can indicate whether they can view the transaction history only, or can also view the document data.
- **Site Administrator** - this role has full access to your Parchment Exchange account, including the ability to add, edit, and delete administrators, and manage the account preferences. You must assign at least one administrator to the Site Administrator role.



## Email alert if you have orders waiting

If you have orders in your **To Do** tab and no administrators have logged in for 24 hours, the primary sender will get an email telling them that orders are waiting.

However, you should not rely too heavily on these emails because if another administrator logs in and does not action the requests, the email won't be sent out. An entire 24 hours must pass before an email is sent out.

# Troubleshooting

## I UPLOADED THE TRANSCRIPT, BUT IT HASN'T REACHED ITS DESTINATION.

Check your **In Process** tab. Any transcripts that have been approved but did not process will land in the **In Process** tab. Go to the **In Process** tab for details.

## HOW DO I FIND WHICH ORDERS I HAVE PROCESSED?

Use the **History** tab. You can see when an order was received, approved, and sent. Go to the **History** section for more information.

## WHAT HAPPENS IF I FORGET TO UPLOAD A TRANSCRIPT AFTER I APPROVE IT?

These orders will be in the **In Process** tab. Click **Reset** to reset the order. Go to the **In Process** tab for details.

## HOW DO I ADD ATTACHMENTS?

To add additional credentials, use the **Add Credentials** button. Hover over the order and click **More**, and then click **Add Credentials**.

## IS A ROSTER RECORD MANDATORY?

No. A learner can still place an order and you can still fulfill the order. We recommend that you use rosters because you can add a transcript to a learner's roster record, which means that when the learner places an order, the transcript is in place and ready to go.

## I HAVE A LOT OF UNMATCHED TRANSCRIPTS. WHAT SHOULD I DO?

By default, the system will remove any unmatched transcripts after four days. You can change this in the **Library Display** settings. It is a good idea to match any unmatched transcripts with roster records. If you do not have a roster record, then you can **remove the unmatched transcript manually**, or wait until the system removes it.

## I HAVE UNMATCHED LEARNER REGISTRATIONS. WHAT SHOULD I DO?

When a learner registers for a Parchment.com account, the system will try to match their new account with an existing roster record. If a roster record doesn't exist, or it does but the information didn't match (for example, the learner registered with the name Eddie, but Edward is listed in the roster), their unmatched registration appears in the **Match Learner Accounts** section, and then you can try to match them with your roster records.

## WHAT IS 'MATCHING'?

We use the term 'matching' when referring to different parts of the fulfillment process, for example:

- When you upload transcripts to the Credentials Library, the system attempts to match the transcripts with roster records.

- When you upload transcripts after approving orders, the system attempts to match the transcripts to the orders. It also attempts to match the transcripts with roster records.
- When your learners create Parchment accounts, the system attempts to match these with existing roster records.

The matching criteria Parchment uses are first name, last name, date of birth, learner ID, and social security number. **Three out of five of these must match.**

### WHAT IS A REGISTRATION CODE?

Available to high school learners only, a registration code does two things:

- It speeds up the learner registration process. When your learners register for a Parchment.com account using an invitation code, they do not have to enter any of the information that you already provided in the roster, such as their name and date of birth.
- It also ensures that the learner's roster record automatically matches their Parchment.com registration.

Go to the [Registration Codes](#) section for more information.

### HOW DO I ADD A LEARNER (AND NOT AN ENTIRE ROSTER)?

Go to the [Add a learner](#) section.

### CAN I UPLOAD A ROSTER MORE THAN ONCE IF I ADD NEW LEARNERS TO IT?

Yes. You will get the option to replace or keep the existing learners.

### WHAT IS AN UNOFFICIAL TRANSCRIPT REQUEST?

This is an option that is free and available to high school learners only. When a high school learner adds your school to their account, they can choose to have an electronic copy of their unofficial transcript stored in their account. [Read more about unofficial transcript requests](#) in our Help Center.

### HOW CAN I FIND THE STATUS OF AN ORDER?

1. Sign in to [Parchment](#).
2. Click **History**.
3. Fill in the fields that you would like to search and click **Search**.
4. You will see the status under the **Status** column on the right side.

# Contact information

## PARCHMENT CORPORATE HEADQUARTERS

Parchment Inc.  
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Scottsdale, Arizona 85250

## TECHNICAL SUPPORT

[Sign in to your account](#) and click **Support** to access our Help Center and get in touch. Make sure you're logged in first because we create content just for you!