



# Electronic Transcript Management System (eTMS)

## User Guide for College Partners

OCAS  
November 2024

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# Introduction

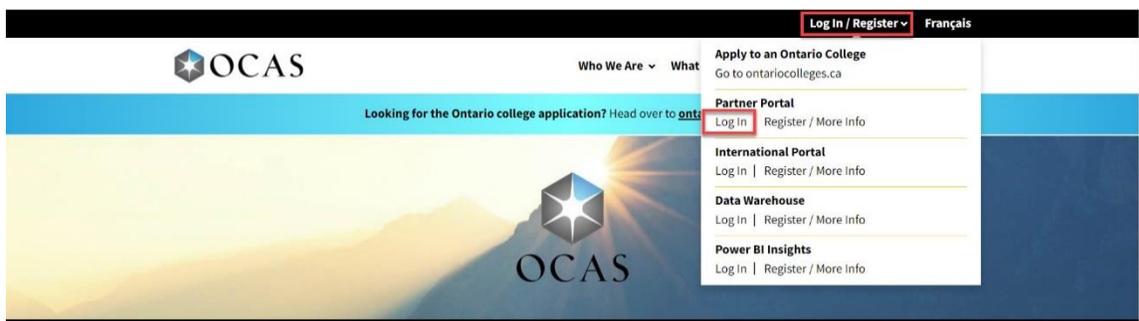
The Electronic Transcript Management System (eTMS) is a system developed by OCAS that enables you to quickly and easily to upload transcripts for students who have previously attended college.

The system is designed to work with data in the form of XML files.

## Accessing eTMS

To access eTMS:

1. Go to [www.ocas.ca](http://www.ocas.ca).
2. In the banner, select **Log In / Register**.
3. In the drop-down menu, under Partner Portal, select **Login**.



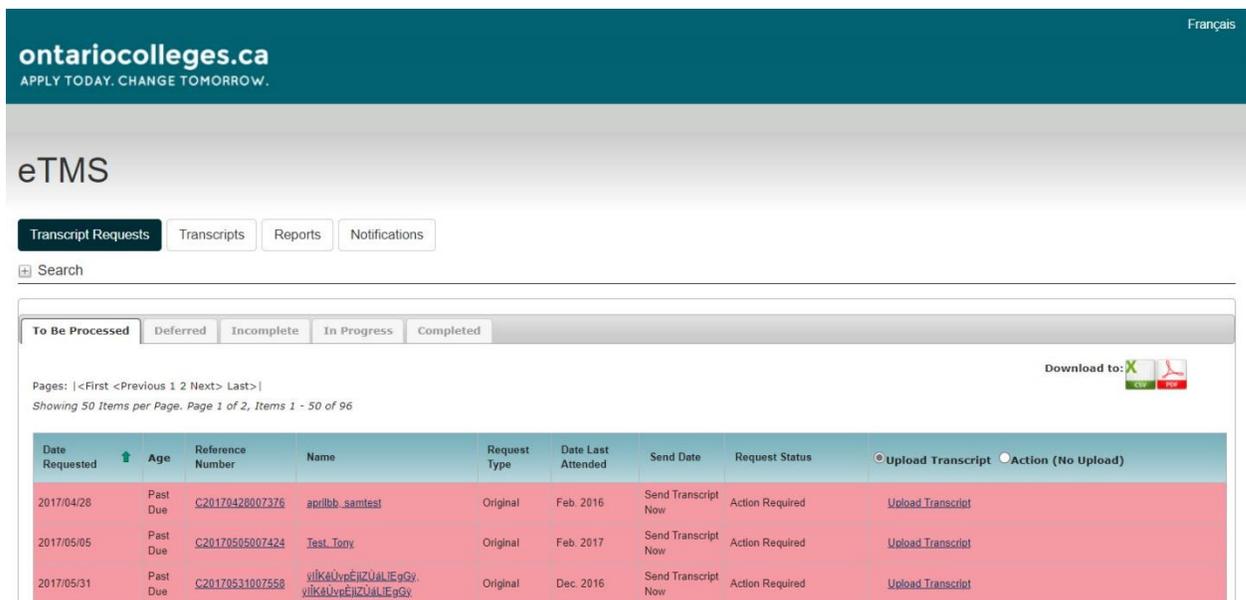
4. Log in using the username and password provided in the Partner Portal registration email.

**Note:** Login information is case-sensitive.

You can also log in by going to [partnerportal.ocas.ca](http://partnerportal.ocas.ca).

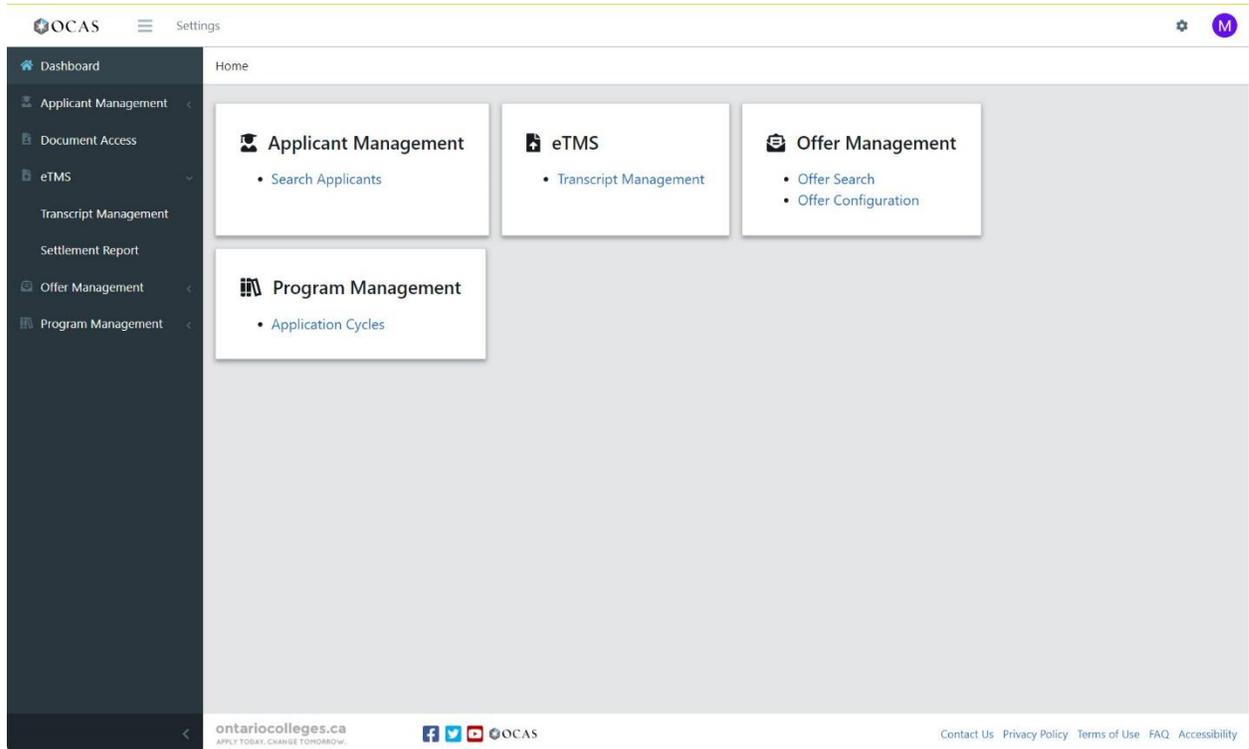
Be sure to bookmark this URL for quick access to the Partner Portal.

After logging in, if you have eTMS-only access, the eTMS page opens.

A screenshot of the eTMS interface. The top header shows 'ontariocolleges.ca' and 'APPLY TODAY. CHANGE TOMORROW.'. Below the header is the 'eTMS' title and navigation tabs for 'Transcript Requests', 'Transcripts', 'Reports', and 'Notifications'. A search bar is present. Below the search bar are tabs for 'To Be Processed', 'Deferred', 'Incomplete', 'In Progress', and 'Completed'. The 'To Be Processed' tab is active. The main content area shows a table of transcript requests with columns for Date Requested, Age, Reference Number, Name, Request Type, Date Last Attended, Send Date, Request Status, and Action (No Upload). The table contains three rows of data.

Date Requested	Age	Reference Number	Name	Request Type	Date Last Attended	Send Date	Request Status	Action (No Upload)
2017/04/28	Past Due	C20170428007376	aprlbb_samtest	Original	Feb. 2016	Send Transcript Now	Action Required	Upload Transcript
2017/05/05	Past Due	C20170505007424	Test_Tony	Original	Feb. 2017	Send Transcript Now	Action Required	Upload Transcript
2017/05/31	Past Due	C20170531007568	yik&UvpEjizU&LEgGy yik&UvpEjizU&LEgGy	Original	Dec. 2016	Send Transcript Now	Action Required	Upload Transcript

If you have access to eTMS and other functions in the Partner Portal, the Dashboard Home page opens.



5. In the navigation pane, under eTMS, select **Transcript Management**.



# The eTMS Dashboard

The eTMS dashboard features are organized into four sections:

- **Transcript Requests** – Access all transcript requests for your college.
- **Transcripts** – Access all received electronic transcripts.
- **Reports** – Access Summary and Detailed Reports. For details, see [Reports](#).
- **Notifications** – Access to customizable email notification options. For details, see [Notifications](#).

The screenshot displays the eTMS dashboard for ontariocolleges.ca. The header includes the logo and the tagline "APPLY TODAY. CHANGE TOMORROW." along with a "Français" link. The main navigation bar contains buttons for "Transcript Requests", "Transcripts", "Reports", and "Notifications". Below this is a search bar and a filter bar with tabs for "To Be Processed", "Deferred", "Incomplete", "In Progress", and "Completed". The main content area shows a table of transcript requests with columns for Date Requested, Age, Reference Number, Name, Request Type, Date Last Attended, Send Date, Request Status, and actions for Upload Transcript and Action (No Upload). Three rows of data are visible, all with a status of "Action Required".

Date Requested	Age	Reference Number	Name	Request Type	Date Last Attended	Send Date	Request Status	Upload Transcript	Action (No Upload)
2017/04/28	Past Due	C20170428007376	aprilbb_samtest	Original	Feb. 2016	Send Transcript Now	Action Required	Upload Transcript	
2017/05/05	Past Due	C20170505007424	Tast_Tony	Original	Feb. 2017	Send Transcript Now	Action Required	Upload Transcript	
2017/05/31	Past Due	C20170531007558	yik&UvnpEijZU&LIEgGy. yik&UvnpEijZU&LIEgGy.	Original	Dec. 2016	Send Transcript Now	Action Required	Upload Transcript	

# Transcript Requests

ontariocolleges.ca  
APPLY TODAY. CHANGE TOMORROW.

Franglais

eTMS

Transcript Requests | Transcripts | Reports | Notifications

Search

To Be Processed | Deferred | Incomplete | In Progress | Completed

Pages: | < First < Previous 1 2 Next > Last > |  
Showing 50 Items per Page. Page 1 of 2. Items 1 - 50 of 96

Download to:

Date Requested	Age	Reference Number	Name	Request Type	Date Last Attended	Send Date	Request Status	<input type="radio"/> Upload Transcript <input type="radio"/> Action (No Upload)
2017/04/28	Past Due	C20170428007376	aprilbb_samtest	Original	Feb. 2016	Send Transcript Now	Action Required	<a href="#">Upload Transcript</a>
2017/05/05	Past Due	C20170505007424	Test Tony	Original	Feb. 2017	Send Transcript Now	Action Required	<a href="#">Upload Transcript</a>
2017/05/31	Past Due	C20170531007558	vik&UprEjZU&LI&Gy vik&UprEjZU&LI&Gy	Original	Dec. 2016	Send Transcript Now	Action Required	<a href="#">Upload Transcript</a>

**To Be Processed** – View transcript requests to be processed or that require follow-up.

**Deferred** – Display a list of transcript requests that are currently deferred.

**Incomplete** – View transcript requests with an exception; for example, Student Not Found, On Financial Hold, No Academic Data, or File Upload error.

**In Progress** – View transcript requests currently being processed by the system.

**Completed** – View completed or fulfilled transcript requests. By default, transcript requests are sorted in descending order based on the fulfillment date, with the most recent one at the top.

**Download to CSV** – View all transcript request details provided by each applicant. The information can be filtered and sorted.

**Download to PDF** – View all transcript request details provided by each applicant.



## Transcript Request Table

Date Requested	Age	Reference Number	Name	Request Type	Date Last Attended	Send Date	Request Status	<input checked="" type="radio"/> Upload Transcript <input type="radio"/> Action (No Upload)
2017/06/02	Past Due	<a href="#">C20170602007567</a>	<a href="#">cbatest_srin</a>	Original	Apr. 2010	Send Transcript Now	Action Required	<a href="#">Upload Transcript</a>
2021/03/01	Past Due	<a href="#">2020102795636</a>	<a href="#">D'Aloisio, Aimé</a>	Original		Send Transcript Now	Action Required	<a href="#">Upload Transcript</a>
2021/05/21	Past Due	<a href="#">2021052005732</a>	<a href="#">Riddell, Hamish</a>	Original		Send Transcript Now	Action Required	<a href="#">Upload Transcript</a>
2021/07/13	Past Due	<a href="#">2021070706053</a>	<a href="#">Al-Ass'ad, Des'Ree</a>	Original		Send Transcript Now	Action Required	<a href="#">Upload Transcript</a>
2022/04/20	Past Due	<a href="#">2022040902603</a>	<a href="#">Emmie Herzlinger, Trujillo Candace E.</a>	Original		Send Transcript Now	Action Required	<a href="#">Upload Transcript</a>
2022/10/27	Past Due	<a href="#">2022090803675</a>	<a href="#">D'ella, Bruno</a>	Original	Jan. 2009	Send Transcript Now	Action Required	<a href="#">Upload Transcript</a>
2022/10/27	Past Due	<a href="#">2022090803676</a>	<a href="#">D'ella, Bruno</a>	Original		Send Transcript Now	Action Required	<a href="#">Upload Transcript</a>
2022/10/27	Past Due	<a href="#">2022090803678</a>	<a href="#">Arbia, Juliet Shaw</a>	Original		Send Transcript Now	Action Required	<a href="#">Upload Transcript</a>
2022/10/27	Past Due	<a href="#">2022090803677</a>	<a href="#">Arbia, Juliet Shaw</a>	Original		Send Transcript Now	Action Required	<a href="#">Upload Transcript</a>
2022/11/02	Past Due	<a href="#">2022101704078</a>	<a href="#">Trevor Demeko, Jermaine Gallagher</a>	Original		Send Transcript Now	Action Required	<a href="#">Upload Transcript</a>
2023/08/25	Past Due	<a href="#">2023082407580</a>	<a href="#">Macmillan, Rudy</a>	Original	Jan. 2005	Send Transcript Now	Action Required	<a href="#">Upload Transcript</a>
2024/05/06	Past Due	<a href="#">2024050611234</a>	<a href="#">awdtzAjude, jsbuhAuto</a>	Original		Send Transcript Now	Action Required	<a href="#">Upload Transcript</a>

**Date Requested** – Date a transcript request was paid. By default, the table is sorted by Date Requested from oldest to newest request (ascending order).

Click the arrow to sort from newest to oldest.

**Age** – Age of the request in number of days. If a request reaches the Service Level Agreement (SLA) threshold time, it is highlighted in yellow. If a request goes beyond the SLA time, it is highlighted in red.

**Reference Number** – Number assigned by the system when the transcript request was initiated.

Click the link to view the transcript request details.

**Name** – Applicant's first and last name as provided on their ontariocolleges.ca application.

Click the Name link to view the Applicant Details page.

By default, the table is sorted by Date Requested in descending order. To sort the table by last name, click the Name heading.

**Request Type** – Type of request.

**Date Last Attended** – Year and month the applicant last attended.

**Send Date** – Date the transcript request is to be sent; for example, Send Transcript Now, Send End of Term.

**Request Status** – Status of the request.

**Upload Transcript** – By default, the Upload Transcript option is selected and provides easy access to the Upload Transcript function.

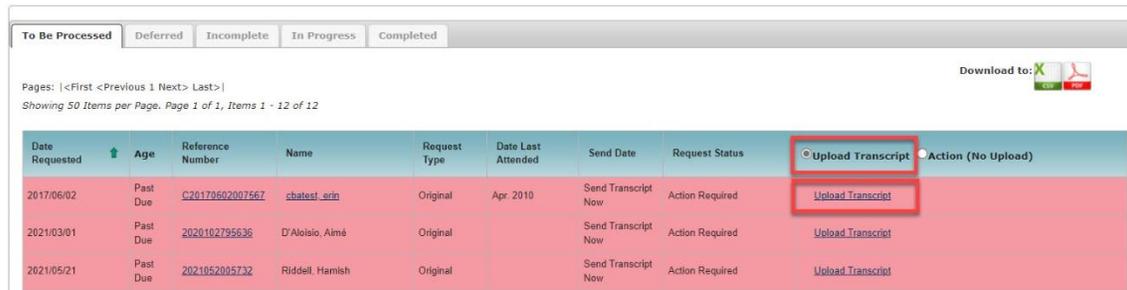
**Action (No Upload)** – Click this option and select the appropriate action when an electronic file (XML) cannot be uploaded.

**Re-Upload Transcript** – Located on the **Completed** tab, an XML file can be uploaded again to eTMS.



## Upload Transcript

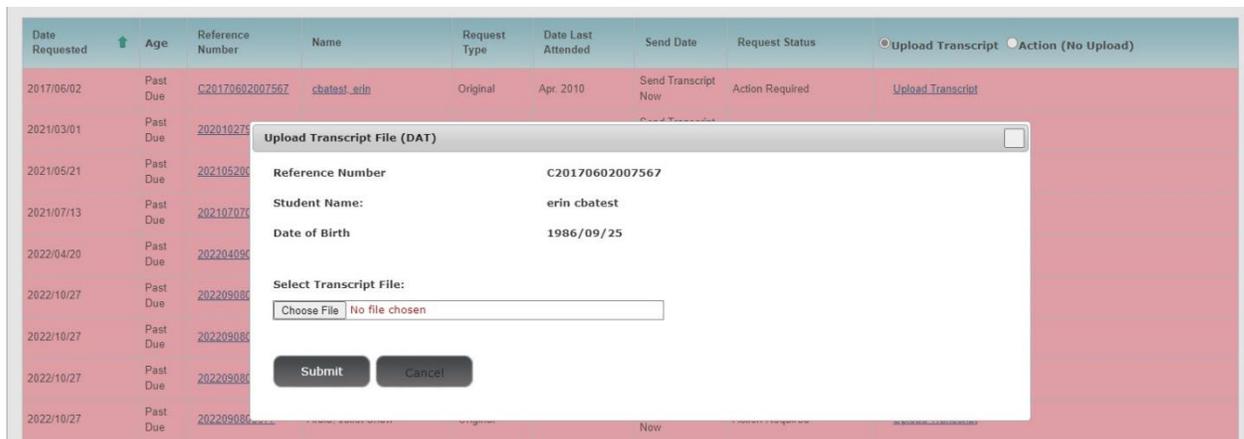
1. On the eTMS main page, select the **Upload Transcript** option.



The screenshot shows the eTMS main page with a table of transcript requests. The table has columns for Date Requested, Age, Reference Number, Name, Request Type, Date Last Attended, Send Date, Request Status, and Action. The 'Action' column has two radio buttons: 'Upload Transcript' (selected) and 'Action (No Upload)'. A red box highlights the 'Upload Transcript' radio button and the 'Upload Transcript' link in the 'Action' column for the first row.

Date Requested	Age	Reference Number	Name	Request Type	Date Last Attended	Send Date	Request Status	Upload Transcript	Action (No Upload)
2017/06/02	Past Due	C20170602007567	cbatest_erin	Original	Apr. 2010	Send Transcript Now	Action Required	<input checked="" type="radio"/>	Upload Transcript
2021/03/01	Past Due	2020102795636	D'Aloisio, Aimé	Original		Send Transcript Now	Action Required	<input type="radio"/>	Upload Transcript
2021/05/21	Past Due	2021052005732	Riddell, Hamish	Original		Send Transcript Now	Action Required	<input type="radio"/>	Upload Transcript

2. Click the **Upload Transcript** link.  
The Upload Transcript File (XML) window opens.
3. Select **Choose File** to select an XML transcript file from your computer.



The screenshot shows the 'Upload Transcript File (DAT)' dialog box. The dialog box has a title bar and a close button. It contains the following fields and buttons:

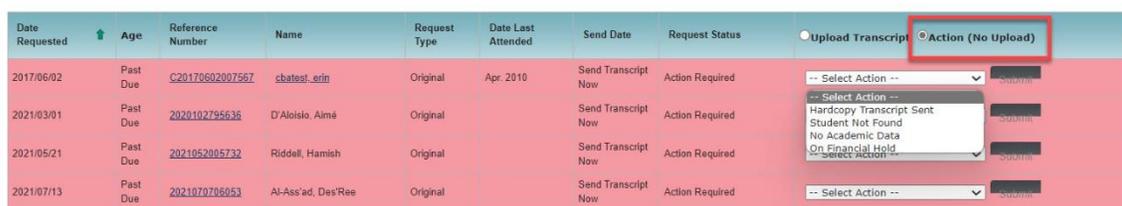
- Reference Number: C20170602007567
- Student Name: erin cbatest
- Date of Birth: 1986/09/25
- Select Transcript File: Choose File (No file chosen)
- Submit button
- Cancel button

4. Select **Submit** to upload the selected transcript file to the eTMS system or select **Cancel** to cancel the transaction.

## Action (No Upload)

When you cannot upload a file using eTMS, you can choose an alternative action.

1. Select **Action (No Load)**.
2. In the drop-down list, select an action.



The screenshot shows the eTMS main page with a table of transcript requests. The 'Action' column has two radio buttons: 'Upload Transcript' and 'Action (No Upload)'. The 'Action (No Upload)' radio button is selected. A red box highlights the 'Action (No Upload)' radio button and the drop-down menu in the 'Action' column for the first row. The drop-down menu is open, showing the following options:

- Select Action --
- Hardcopy Transcript Sent
- Student Not Found
- No Academic Data
- On Financial Hold
- Select Action --

**Hardcopy Transcript Sent** – Transcript is only available in hardcopy format and is being sent to destination institutions. The College user cannot find an electronic transcript XML in their Student Information System (SIS) to fulfill the transcript request and has the transcript in archive format only.

The College user prints the transcript and faxes or mails the hardcopy transcript to the destination institution(s) specified on transcript request details page.

**Student Not Found** – The student record could not be located in the college’s SIS system.

Request status is updated in the online application portal to inform the applicant their student record could not be found. An automated email is sent to the applicant with instructions to contact the college with any questions.

The transcript request is moved to the Incomplete tab.

**No Academic Data** – Used when the student is registered at a college and is found in the college’s SIS system, but no academic data is available to send; for example, the student is pre-registered only.

**On Financial Hold** – Used to hold transcript requests due to outstanding fees owed to the college by the student / applicant.

Request status is updated in the online application portal to inform the applicant that payment is outstanding, and their transcript request will not be processed. An automated email is sent to the applicant with instructions to contact the college to settle the outstanding fees.

Transcript request is moved to the Incomplete tab and can be further actioned at a later date.

**Deferred** – Available only if the specified Send date is other than Send Transcript Now. The request is set to Deferred status and the college user shows the date when the transcript will be available.

Transcript request is moved to the Deferred tab.

**Acknowledge Cancellation** – Available only for Cancellation Transcript Request Type; used to send an acknowledge cancellation response.

Request status is updated in the online application portal to inform the applicant their request was cancelled. Transcript request is moved to the Completed tab.

3. Click **Submit** to save.



# Transcript Request Details

Print

---

TRANSCRIPT REQUEST DETAILS

Action :  Provide Response

Upload Transcript  No file chosen

Note that fields that have no values are hidden for your convenience.

**TRANSCRIPT REQUEST INFORMATION**

Date Received	2017/04/28
Reference Number	C20170428007376
Application Number	170029845
Account Number	210019529755
Request Type	ORIGINAL
Send Transcript	SEND TRANSCRIPT NOW
Send or Term Date	N
Current Status	Action Required
Last Updated By	System/Systeme

**STUDENT INFORMATION**

Surname	aprilbb
First Name	samtest
Gender	Male
Date of Birth	1995/06/13
OEN	00000000
Student ID	1231313
College Name	George Brown
Date Last Attended	2016/02/01

**CONTACT DETAILS**

Phone Number	(111) 1111111
Email Address	samtestaprilbb@mailinator.com

**SEND TRANSCRIPTS TO**

1. Algonquin
--------------

**Print** – Prints the information displayed on-screen.

**Provide Response** – Displays available response options.

**Upload Transcript** – Displays the upload transcript function.

**Close** – Closes the Transcript Request Details page and returns to the eTMS main page.

**Note:** Fields with no values are hidden for your convenience.



# Applicant Search

## Applicant Search – Basic

1. To search for a transcript request, click **Search** to access basic search functions.

The screenshot shows a search form titled "Search" with a dropdown arrow. It contains several input fields: Start Date, End Date, Application Number, OEN, Account Number, Reference Number, First Name, and Last Name. Each date field has a calendar icon to its right.

2. You can specify any of the following search criteria:
  - Creation date (Start Date / End Date)
  - Application Number
  - Account Number
  - Reference Number
  - Ontario Education Number (OEN)
  - First Name
  - Last Name
3. Select **Search** to search for transcript requests that match the entered criteria or select **Clear** to clear all search criteria.

## Applicant Search – More Search Options

1. To perform an advanced search, select **More Search Options**.

The screenshot shows a search form titled "More Search Options" with a dropdown arrow. It includes a "Date Last Attended" field with a "To" field and a calendar icon. There are also fields for "Transcript Request ID" and "Process ID". Below these are several sections of checkboxes: "Show Status" (Select All), "To Be Processed" (Action Required), "Deferred" (Winter, Fall, Spring/ Summer, After Degree), "Incomplete" (File Upload Error, On Financial Hold, No Academic Data, Student Not Found), "In Progress" (Transcript File Uploaded to OCAS), and "Complete" (Electronic Transcript Sent, Hardcopy Transcript Sent, Request Cancelled). At the bottom are "Search" and "Clear" buttons.

2. You can specify any of the following search criteria:
  - **Date Last Attended** – Search for requests by the date the applicant last attended high school.
  - **Show Status:** Select All – Search all tabs and request statuses to retrieve a result.
  - **To Be Processed:** Action Required – Search for requests only within the To Be Processed tab with Action Required status.
  - **Deferred:** Search for the following send dates: Winter, Fall, Spring / Summer, or After Degree is conferred.
  - **Incomplete** – Search within the Incomplete tab for the following request statuses: File Upload Error, On Financial Hold, No Academic Data, and Student Not Found.



- **In Progress:** Transcript File Uploaded to OCAS – Search within the In Progress tab for requests with electronic transcript files waiting to be processed by OCAS’ system.
  - **Complete** – Search within the Complete tab for the following request statuses:
    - Electronic Transcript Sent – Requests with electronic transcript files sent to the institutions.
    - Hardcopy Transcript Sent – Requests with hardcopy transcripts sent to the institutions.
    - Request Cancelled – Requests that have been cancelled by OCAS.
3. Select **Search** to search for transcript requests that match the entered criteria or select **Clear** to clear all search criteria.

## Transcripts

The screenshot shows the eTMS interface for transcript requests. At the top, there is a navigation bar with the logo 'ontariocolleges.ca' and the tagline 'APPLY TODAY. CHANGE TOMORROW.' The page title is 'eTMS'. Below the title, there are tabs for 'Transcript Requests', 'Transcripts', 'Reports', and 'Notifications'. A search bar is located below the tabs. The main content area is divided into two sections: 'To Be Processed' (selected) and 'Completed'. The 'To Be Processed' section displays a table of transcript requests with the following columns: Date Requested, Reference Number, Account Number, Name, Request Type, Request Status, Last Updated Date, and Select Action. The table contains three rows of data.

Date Requested	Reference Number	Account Number	Name	Request Type	Request Status	Last Updated Date	Select Action
2016/11/18	<a href="#">C20161118500888</a>	210018677680	<a href="#">MacDonald, Benjamin</a>	Original	Electronic Transcript Sent	2016/11/18	-- Select Action --
2016/11/18	<a href="#">C20161118500890</a>	210018679840	<a href="#">Akintola-Fabrissy, Akinyélé</a>	Original	Electronic Transcript Sent	2016/11/18	-- Select Action --
2016/11/30	<a href="#">C20161130500895</a>	210018764629	<a href="#">Morris, Akinyélé</a>	Original	Electronic Transcript Sent	2016/11/30	-- Select Action --

**To Be Processed** – Display a list of transcript requests to be processed.

**Completed** – Display a list of completed transcript requests.

**Date Requested** – The date the transcript request was paid.

**Reference Number** – System-assigned number at the time the transcript request is initiated. Click the link to display the official transcript.

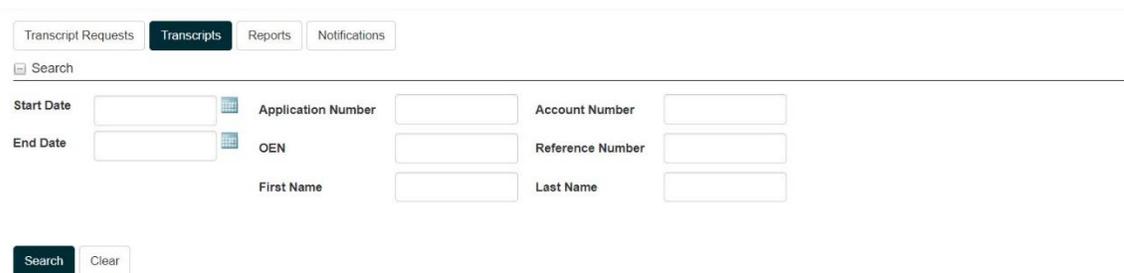
**Name** – Applicant’s first and last name, as provided on their ontariocolleges.ca application.

**Request Type** – Type of request.

**Request Status** – Status of request.

## Transcript Search

1. To search for a transcript, click **Search** to access basic search functions.



Transcript Requests | **Transcripts** | Reports | Notifications

Search

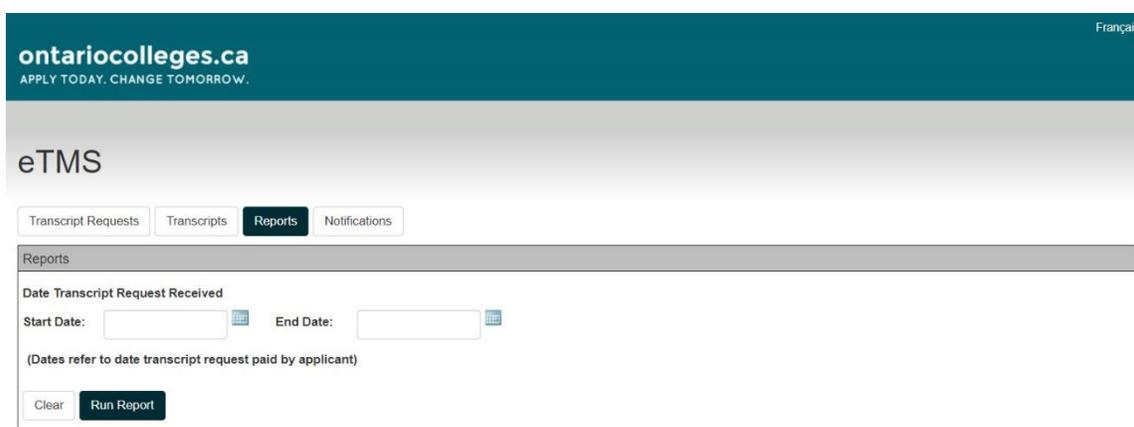
Start Date:  Application Number:  Account Number:   
End Date:  OEN:  Reference Number:   
First Name:  Last Name:

**Search** Clear

2. You can specify any of the following search criteria:
  - Creation date (Start Date / End Date)
  - Application Number
  - Account Number
  - Reference Number
  - Ontario Education Number (OEN)
  - First Name
  - Last Name
3. Select **Search** to search for transcripts that match the entered criteria or select **Clear** to clear all search criteria.

## Reports

1. On the eTMS main page, select **Reports**.



ontariocolleges.ca  
APPLY TODAY. CHANGE TOMORROW.

Franglais

eTMS

Transcript Requests | Transcripts | **Reports** | Notifications

Reports

Date Transcript Request Received

Start Date:  End Date:

(Dates refer to date transcript request paid by applicant)

Clear **Run Report**

2. Select the transcript request creation date range: Start Date and End Date.
3. Select **Run Report** to generate a report based on the specified criteria or select **Clear** to clear all report criteria.

## Summary Reports

In the Summary, you can view the status of transcript requests for the selected date range.

The following example summary shows the status of requests submitted between April 1 and April 30, 2024.

Summary		Detailed	
Download  			
Date Range : 2024/04/01 to 2024/04/30			
Total Transcript Requests	Original Transcript Requests	Re-Issue Transcript Requests	
To Be Processed	2	0	
Deferred	0	0	
Incomplete	0	0	
On Financial Hold	0	0	
Student Not Found	0	0	
No Academic Data	0	0	
File Upload Error	0	0	
In Progress	0	0	
Completed	0	0	
OCAS Auto eTMS Processed XML Electronic Transcripts Sent	0	0	
OUAC Auto eTMS Processed XML Electronic Transcripts Sent	0	0	
OCAS Manually uploaded XML Electronic Transcripts Sent	0	0	
OUAC Manually uploaded XML Electronic Transcripts Sent	0	0	
OCAS Hardcopy Transcripts Sent	0	0	
OUAC Hardcopy Transcripts Sent	0	0	
Requests Cancelled	0	0	
Receipt Acknowledged	0	0	
OCAS Unknown Source	0	0	
OUAC Unknown Source	0	0	
TOTAL TRANSCRIPT REQUESTS	2	0	
AVERAGE TIME FOR FULFILLMENT - 0 BUSINESS DAYS			
% Of Transcript Requests processed by Auto eTMS	0%		

## Detailed Reports

In the Detailed report, you can view transcript request details by applicant for the selected date range.

The following example Detailed report shows the details of the requests submitted between April 1 and April 30, 2024.

Summary		Detailed						
Download  								
Pages:   <First <Previous 1 Next> Last>								
Showing 50 Items per Page. Page 1 of 1, Items 1 - 2 of 2								
Application Number	Reference Number	Date Paid	First Name	Last Name	Date of Birth	Student Number	Date Last Attended	Number of Transcripts
20251400510	2024042410872	2024/04/24	dfuyjAuto	rxblAJude	1992/03/27	20240424005		0
20257500000	2024040910584	2024/04/09	Charles-Etienne	Gerome Maslan	1994/07/30	20240409001		0
Pages:   <First <Previous 1 Next> Last>								
Showing 50 Items per Page. Page 1 of 1, Items 1 - 2 of 2								

# Notifications

The screenshot shows a web interface with three tabs: 'Transcript Requests', 'Reports', and 'Notifications'. The 'Notifications' tab is active. Below the tabs is a dark header with the text 'Summary Notification Settings'. The main content area contains the following elements:

- Instructional text: 'Select the Enable Summary Notification checkbox below to be notified by email whenever there are requests that are to be processed. Note that this configuration does not affect the request Non-Fulfillment Notifications to the requestor which are always sent immediately and cannot be turned off.'
- 'Enable Summary Notifications: '
- 'Notify transcript requests fulfilled: '
- 'Select a day:  Sunday  Monday  Tuesday  Wednesday  Thursday  Friday  Saturday'
- 'Select a time: 8:00 AM Time Zone: (GMT-05:00) Eastern Time (US & Canada)'
- 'Email: support@desk.ocas.ca, requests@desk.ocas.ca'
- Radio buttons for notification triggers:
  - Notify of Transcript Requests which are waiting to be processed for  or more business hours
  - Notify of any to be processed Transcript Requests
- 'Clear' and 'Submit' buttons at the bottom.

**Enable Summary Notifications** –Enables email notifications. Users will receive email notifications whenever there are processed or pending requests.

**Notify transcript requests fulfilled (for Auto eTMS users, only)** – The email notification will include the number of requests that were fulfilled by Auto eTMS.

**Select a day** – Select the day(s) to send email notifications.

**Select a time** –Select the time to send email notifications.

**Time Zone** – Select the time zone for email notifications.

**Email** – Enter the email addresses that will receive email notifications. Use a semicolon (;) to separate each email address.

**Notify of Transcript Requests which are waiting to be processed for \_\_\_ or more business hours**

Set the number of hours to receive a notification for transcript requests requiring attention. In eTMS, one business day is eight business hours.

**Notify of any to be processed Transcript Requests** – An email will be sent as each transcript request occurs.

**Submit** – Save the current email notifications configuration.

**Note:** Click **Submit** each time any changes are made.

**Clear** – Clear all fields and disable email notifications.

**Note:** Changes will not be saved until the Submit button is clicked. If clicked by accident, simply close the browser and re-open Notifications.

