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## Rosters and registration codes

How to upload your roster and give your students their registration codes



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## Introduction

By uploading your roster and giving your students their registration codes, your students can complete the Parchment.com registration process in just a few steps. This is because they do not have to re-enter any of the information that you already provided in the roster (such as their name, date of birth and graduation year). And then, when they are ready, they can request transcripts quickly and easily.

The following pages give step-by-step instructions explaining how this process works. Here's an overview:

# 1

**MAKE SURE YOUR ROSTER IS  
IN THE CORRECT FORMAT**



# 2

**UPLOAD YOUR ROSTER  
TO PARCHMENT SEND**



# 3

**EMAIL OR PRINT  
REGISTRATION CODES**



# 4

**STUDENTS REGISTER AND  
REQUEST TRANSCRIPTS**



## Step 1 - Make sure your roster is in the correct format

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

- First name
- Last name
- Date of birth
- Student ID
- Graduation/leave year

You can include other fields, such as the student's mailing address and email address, but these are not mandatory. If you want to email registration codes to your students, you will need to add an 'email address' field.

You can create your roster yourself, or you can use your SIS (if you need help, please refer to your SIS's help center). You can also use the template that we provide.

### Create a roster using the template we provide

1. Log in to [Parchment](#).
2. Click **Settings**.
3. Click **Import Student Records**.
4. Click the blue **template** link (see red circle in the image below). This will download a .csv file onto your computer that you can fill in with the student roster. Remember that you must include first and last name, date of birth, student ID, and graduation/leave year.

#### Import Student Roster

Roster Upload > Map Columns > Upload

The following fields must be included in your Student Roster file. Use the **template** to ensure auto mapping.

- Student Name (First and Last)
- Student Date of Birth
- Student ID (must be unique across all class years)
- Graduation/Leave Year

## Step 2 - Upload your roster to Parchment Send

1. Log in to [Parchment](#) and click **Settings**.
2. Click **Import Student Records**.

<a href="#">Profile</a>	<a href="#">Administrators</a>	<a href="#">Send</a>	<b><a href="#">Import Student Records</a></b>	<a href="#">Inbox</a>	<a href="#">Library</a>
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3. Select **Add new** from the **Roster Name** drop-down menu.
  - If you want to replace an existing roster, you can select the name of the existing roster from this drop-down menu.

**Roster Name**  

Add New

4. Under **Data File**, you can either drag your file to the box or click the box and then select your file.

**Data File**  

Click or drag a file here to upload.

5. Under **File Type**, select **Comma Delimited**.
6. Select if your file has headers.
  - If your roster has headers at the top of each column, select **Yes**. If your roster does not have headers, select **No**.
7. Click **Continue**.

### DID YOU MAP THE FIELDS CORRECTLY?

The system will now try to match the required fields with the columns in your roster. You will get a notification that tells you if all the required fields have been mapped.

- On the example on the left, all fields have been mapped.
- On the example on the right, only three fields have been mapped.

You have mapped 5 of 5 required fields.

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

You have mapped 3 of 5 required fields.

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

### MAP ALL FIELDS AND/OR CONFIRM THEY WERE MAPPED CORRECTLY

If you did not map all fields, you will do this now. If you did map all fields, you should still make sure they were mapped correctly.

Look at the drop-down menus under **Mapped Column** (see image on right). Compare what is selected here to those under **File Column Header**. If your roster did not have headers, you would see **Index** instead of **File Column Header**.


If anything does not match correctly and/or you see 'Not Selected', click on that drop-down menu and select the correct option, so that it matches what is under **File Column Header** (or **Index**). When you are ready, click **Continue**.

File Column Header	Prev	Example Record	Next	Mapped Column (* indicates required mapping)
Student First Name	Cristin			* Student First Name
Student Last Name	Dee			* Student Last Name
Student Id	34345			Not Selected
Birth Date	1/1/88			Not Selected
Grad Year	2015			Not Selected
Email Address	testing@parchment.com			Email Address

Back Continue cancel

### PREVIEW YOUR ROSTER

The next screen gives you a preview of your roster.

Hover over the blue circle  to see the student's name, date of birth, student ID, and graduation/leave year. If this blue circle is red, this means that you are replacing an existing record. If you hover over it, you can see the existing record information. You can choose whether to replace it or not by checking the box under the **Keep Existing** column.





- If the student is already registered, you will see their information under the **Registered Student** column.
- Click **Upload Roster** when you are ready to upload your roster.

### Import Student Roster

Roster Upload > Map Columns > Upload

#### Preview

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

Keep Existing	Student	Date of Birth	Gender	Student ID	Registered Student	Grad Year	Errors
<input type="checkbox"/>	Smith, Jenny 	1/1/1977		1234	<input checked="" type="checkbox"/> Smith, Jenny 	2014	
<input type="checkbox"/>	Mitchell, Joe 	1/1/1988		3456		2015	
<input type="checkbox"/>	Jones, Candy 	1/1/1987		7897		2014	

Back Upload Roster cancel

### Add students that are not in the roster

If you have students that are not in the roster, you can add them manually.

1. Log in to [exchange.parchment.com](https://exchange.parchment.com).
2. Click **Send**.
3. Click **Invite Students**.
4. Click **Add Students**.
5. Enter the student's information.
  - All fields with a \* (asterisk) are mandatory.
6. Click **Add**.

**Invite Students: Add Student**

[Invite Students](#) [Manage Roster](#) [Add Students](#)

**Student Information**

\* First Name:

Gender:

Gender ▾

Middle Name:

\* Date of Birth:

Mon ▾ Day ▾ Year ▾

\* Last Name:

\* Unique Student ID:

Suffix:

▾

\* Graduation/Leave Year:

▾

Current Grade Level:

▾

Or highest level completed

**Contact Information**

Country:

United States ▾

Phone Number:

Address:

Email Address:

City:

State/Province:

Select a State/Province ▾

Postal Code:

**Parent/Guardian Information** [add parent/guardian](#)

Add

## Step 3 - Email or print registration codes

You are now ready to invite students to register for a Parchment.com account. To do this, you must first select if you would like to email your students their registration codes, or print them and hand them out. If you have their email addresses in your roster, you should select this option because they can complete their registration in just a few clicks.

### Email Registration Codes

This option creates emails for all of the students in your roster who do not have a Parchment.com account.

1. Click **Send**.
2. Click **Invite Students**.
3. Select **Email Registration Codes**.
4. Select all of the students you'd like to email a registration code.
5. Click **Email Registration Codes**.
6. Under **Customize Email**:
  - Select whether you'd like additional Parchment.com features explained in the registration email.
  - Add a custom message.
  - Select which email address you would like the email sent from.
7. Click **Email these [...] students now**.

### Print Registration Codes

This option creates handouts that you can print out and give to the students in your roster who do not have a Parchment.com account.

1. Click **Send**.
2. Click **Invite Students**.
3. Select **Print Registration Codes**.
4. Select all of the students you'd like to print a registration code for.
5. Click **Print Registration Codes**.
6. Customize the handout.
  - Select whether you'd like additional Parchment.com features explained in the handout
  - Add a custom message.
  - Click **Print handouts for these [...] students now**.



## Step 4 - Students register and request transcripts

Your students are now ready to complete their registration and order transcripts. These guides and videos will help them:

- [Video tutorial: how to register using a registration code](#)
- [Read the help topic explaining how to register using a registration code](#)
- [Video tutorial: how to order transcripts](#)
- [Read the help topic explaining how to order transcripts](#)

## Contact information

### PARCHMENT CORPORATE HEADQUARTERS

Parchment Inc.  
6263 N Scottsdale Road, Ste 330  
Scottsdale, Arizona 85250

### TECHNICAL SUPPORT

Go to [exchange.parchment.com/support](https://exchange.parchment.com/support) where you can search our Support Center for answers to questions. Make sure you're logged in first because we create special content just for you!

Once you're logged in, you can click **Submit a ticket** and someone from our technical support team will get back to you right away.