Batch Transcripts

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1.	**Mini-Process #1. Generate Report Requests** **First time:** Click the Add a New Value tab and follow steps. **Future returns:** Click Find an Existing Value and select appropriate run control ID. *For this example, use the First Time procedure.* Click the **Add a New Value** tab. Add a New Value
2.	Enter an appropriate title for this process in the **Run Control ID** box. *For this example, enter* **batch_transcripts**
3.	Click the **Add** button. Add
4.	Enter appropriate **Report Type** or choose from magnifying glass search. *For this example, enter* **DPR**
5.	Enter the appropriate **Report Identifier** or choose from the magnifying glass search. **NOTE:** For academic departments, choose your department name.
6.	**Check** the **Population Selection** box. ☑
7.	Choose **PS Query** from the **Selection Tool** list. PS Query
8.	Click the magnifying glass associated with the Query Name. 🔍
9.	Click on the appropriate query name. **NOTE:** If you're an academic department, click on SAA_RPT_PROGRAM. SAA_RPT_PROGRAM
10.	Click the **Edit Prompts** link. Edit Prompts
11.	Enter the appropriate information as prompted.
12.	Click the **OK** button. OK
13.	Click the **Preview Selection Results** link. Preview Selection Results

14.	Click the **Return** button.
	Return
15.	Click the **Run** button.
	Run
16.	Choose the **PSUNX** as the **server name**.
	PSUNX
17.	Choose the **Web** as the **Type**.
	Web
18.	Choose **TXT** as the **Format**.
	TXT
19.	Click the **OK** button.
	OK
20.	Click the **Process Monitor** link.
	Process Monitor
21.	Click the **Refresh** button until: 1. Run Status = Success
	2. Distribution Status = Posted.
	Refresh
22.	Click on the **Details** link.
	Details
23.	Click on the **Message Log** link.
	Message Log
24.	As a check, make sure there are lines that indicate the advisement report is being processed for your students.
25.	**Mini-Process #2: Generate Advisement Reports**
	If your advisement report was processing correctly, click on the **Generate Advisement Reports** link in the main menu.
	Generate Advisement Reports
26.	Click on the **Add a New Value** tab.
	Add a New Value
27.	Enter a "title" / Run Control ID for this next mini-phase of the process.
	Example: generate_advisement_rpts
28.	Click the **Add** button.
	Add

29.	Enter or choose the desired **Report Type**. *For this example, type in **dpr***
30.	Click on the **calendar icon** for the From date.
31.	Choose the date. *For this example, choose December **15***
32.	Enter the **report identifier** used earlier in this process. **NOTE:** For academic departments, select your department's name.
33.	Click the **Run** button.
34.	Choose **PSUNX** as the **Server Name**.
35.	Choose **(None)** as the **Type**.
36.	Choose **(None)** as the **Format**.
37.	Click the **OK** button.
38.	Click the **Process Monitor** link.
39.	Click the **Refresh** button until: 1. Run Status = Success 2. Distribution Status = Posted
40.	Once report is posted, click on the **Details** link.
41.	Click the **Message Log** link.
42.	As a check, make sure there are lines that indicate the advisement report is being processed for your students.
43.	**Mini-Process #3: Print Batch Reports** Once the report is Success / Posted, click on the **Print Batch Reports** link in the main menu.

44.	Click on the **Add a New Value** tab. Add a New Value
45.	Enter a "title" / Run Control ID for this next mini-phase of the process. *Example: print_batch_rpts*
46.	Click the **Add** button. Add
47.	Enter or choose the desired **Report Type**. *For this example, type in dpr*
48.	Click on the **calendar icon** for the From date.
49.	Choose the date. *For this example, choose December 15* Click the **15** link. 15
50.	Click on the **calendar icon** for the To date.
51.	Choose the date. *For this example, choose December 15* 15
52.	Enter the **report identifier** used earlier in this process. **NOTE:** For academic departments, select your department's name.
53.	Click the **Run** button. Run
54.	Choose **PSUNX** as the **Server Name**. PSUNX
55.	Choose **Web** as the **Type**. Web
56.	Choose **PDF** as the **Format**. PDF
57.	Click the **OK** button. OK
58.	Click the **Process Monitor** link. Process Monitor

59.	Click the **Refresh** button until: 1. Run Status = Success 2. Distribution Status = Posted Refresh
60.	Click the **Go back to Print Batch Reports** link. Go back to Print Batch Reports
61.	Click the **Report Manager** link. Report Manager
62.	Click the **Refresh** button until the Status is Posted. Refresh
63.	Click on the **link** to view the PDF Batch Transcripts. SAA_BATCH_DS Batch Advisement Reports
64.	The PDF appears in a new window, so **turn off ALL pop-up blockers!!**
65.	**End of Procedure.**