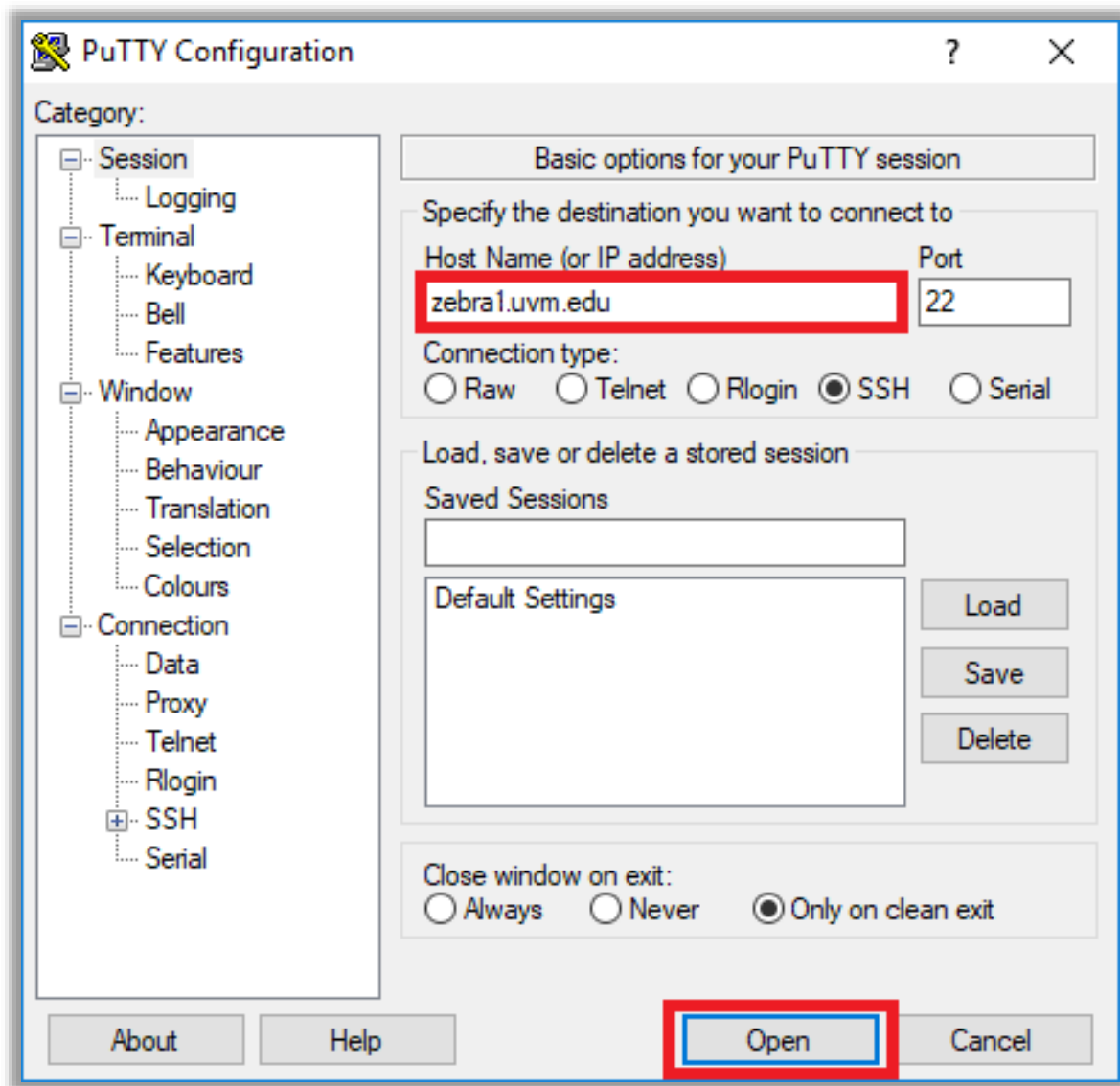


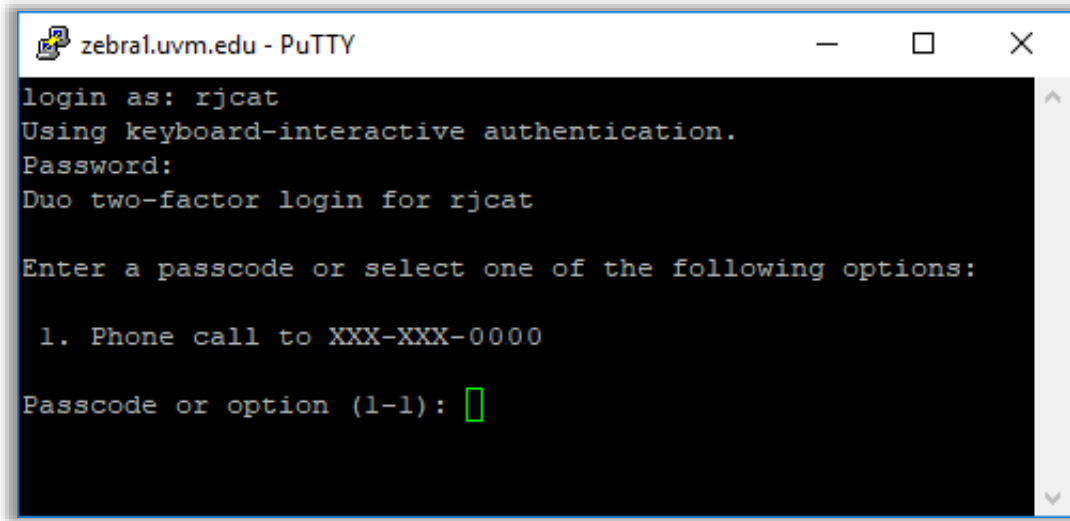
How to Run a Simple RepGen Report

| Step by Step Guide

- 0 **RepGen** (Report Generator) is a UVM created application that allows authorized users to query the Banner database and produce unique reports. Users can select criteria from a series of menus in order to customize which data the application will return.
- 1 To access RepGen you will need to log on to the zebra1 server via a PuTTY session:



- 2 Access to RepGen requires multi-factor authentication. Authorized users should first log on to the zebra1 server with their netID and password, and then complete the authorization based on their multi-factor configuration:



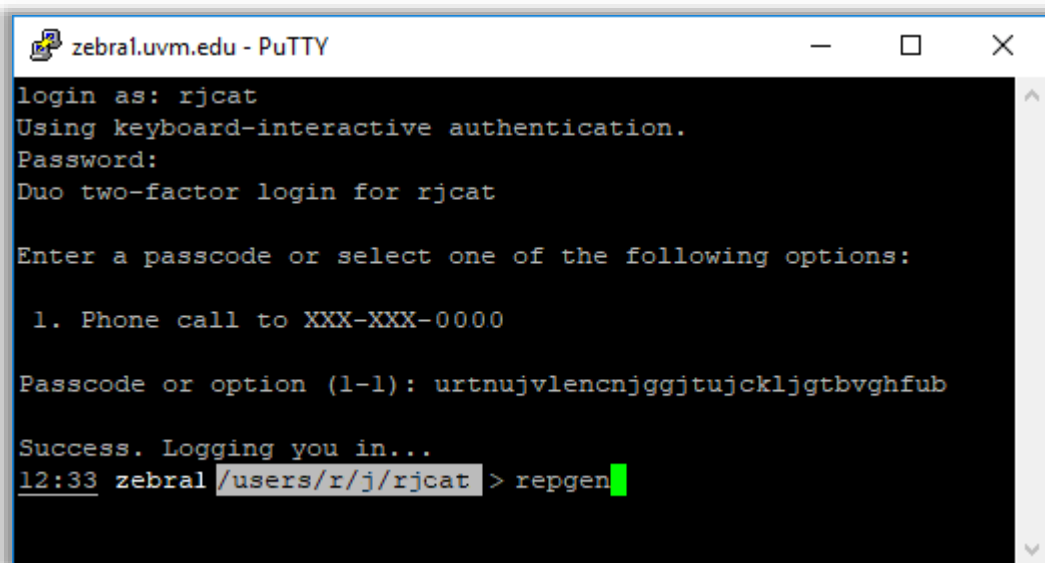
```
zebra1.uvm.edu - PuTTY
login as: rjcat
Using keyboard-interactive authentication.
Password:
Duo two-factor login for rjcat

Enter a passcode or select one of the following options:

 1. Phone call to XXX-XXX-0000

Passcode or option (1-1): █
```

- 3 Once logged in, enter **repgen** at the command prompt:



```
zebra1.uvm.edu - PuTTY
login as: rjcat
Using keyboard-interactive authentication.
Password:
Duo two-factor login for rjcat

Enter a passcode or select one of the following options:

 1. Phone call to XXX-XXX-0000

Passcode or option (1-1): urtnujvlencnjggjtujckljgtbvghfub

Success. Logging you in...
12:33 zebra1 /users/r/j/rjcat > repgen █
```

The following example shows how to create a simple report that sends a comma delimited file via email to the address(es) specified in the configuration. RepGen also contains a number of pre-configured reports from which users can choose.

The next steps will show how to set up a report that you can have sent via email.

If you only wish to query the database, you can skip to step 10.

- 4 To create a report, select **Report Options** (1) from the **Report Generator** menu:

```
UVM Registrar's Office
REPORT GENERATOR

1 - Report Options
2 - Start Over

3 - Save Query File
4 - Load Query File
5 - List Saved Query File(s)

6 - Run Report
7 - View Report

A - About Repgen
N - Repgen News. Last updated: 2015-12-08 15:17

0 - All done

Enter Selection: 1
```

- 5 From the **Report Options** menu, select **Report** (1):

```
REPORT OPTIONS
0 People

1 - Report: <none> Portrait
2 - Make Selections
3 - Choose Sort Options
4 - Choose Print/Email options
5 - Change Report Name

6 - Select Count
7 - View Selection
8 - Show generated SQL

9 - Don't keep REPGEN files

[0] - Quit [DEFAULT]

Enter Selection/ID: 1
```

6 From the **Report Type** menu, choose **32** to generate the extract file:

```
REPORT TYPE - A                                PROD
1 - Student Transcript                          30 - Just Names
3 - Student Schedules                          31 - Names and IDs
4 - Student GPA Report                         32 - Extract file (delimited text fmt)
6 - Student Grade Report
7 - Adm Bridge Grade Report                    40 - Student Curriculum (Major,etc/GPA)
10 - Address/ID Report (80 col)                41 - Major/Minor/Advisor (Midterm Warning)
12 - Address Report (80 col)                   42 - Degree Curriculum (Major,etc/GPA)

20 - Acad History Grade List                   51 - Student Orientation Report
21 - Course Roster                            52 - Banner Transfer Worksheet
22 - Advising Hold Report                     54 - Banner Transcript

M - More Reports                               58 - Degree Works Audit
L - Labels 3up (6lpi) Folder                  [0] - All done [DEFAULT]

Enter Selection: 32
```

7 Choose the delimiter type and field separator for the output (or simply press **Enter** to select the defaults):

```
Delimited file output options
1 - Mark start and end of each field with: "
2 - Separate fields with: ,

Note: Any occurrences of the "Start of field"
      character, within fields being extracted
      will be replaced with a space.

Enter Selection:
```

- 8 Choose the fields you wish to appear in the output by entering the appropriate selections (information that will be included in the output will show **X** next to the corresponding field number):

```
Which fields do you want to include (30 Max)?

X 1 - ID          Student system ID
X 2 - Pname       Preferred First Name
X 3 - Name        First M. Last
X 4 - Fname       First Name
X 5 - Mname       Middle Name
X 6 - Lname       Last Name
X 7 - Coll        College code
X 8 - College     College name
X 9 - Maj         Major code
X 10 - Major      Major name
X 11 - Confid     Confidential indicator (FERPA!)
X 12 - addr       Address
13 - phone        phone # associated with address
14 - fullname     First Middle Last
15 - DegreeInfo  dcode dstat dmaj dterm
16 - curriculum  minor1 concl major2 minor2 conc2

Type number to toggle selection: █
```

Entering **N** will bring you to the next screen. NetID is field 68 and is not a default selection.

- 9 You can also make selections about which type of addresses to include in the output or press **Enter** to accept the defaults:

```
WHICH ADDRESS TO PRINT

1 - Address hierarchy: AL,AP,ANY

Use the address hierarchy to list, in order, the address type you
would like to be used on the report/label.

Example: AP,AL,ANY Use the permanent address if available,
otherwise use the local address if available,
otherwise use any available address.

Current valid address types are:

AL CONFIDENTIAL          OT Other (Ethos)
AL Local/Campus          PX PO Box (Ethos)
AP Permanent (Home)      PY Payment Plan Payer
BR Branch                RG Region (Ethos)
DB Duplicate Billing      SP Shipping (Ethos)
EM Family (Ethos)        ST Support (Ethos)
EX Extramural ;MD        TB Temporary Billing
FO Foreign Address        TR Temporary Registrar
MG Matching Gifts (Ethos) VU Vacation (Ethos)
MN Main (Ethos)          XX Reserved for TGRFEED Use Only
NA No Address default

2 - Check address date? 06-NOV-2019

[0] - All done [DEFAULT]

Enter Selection: █
```

- 10 Once you have configured the output as desired (or have entered **Report Options** (1) if you only wish to query the database), you will next query the database for the specific information in which you are interested by selecting **Make Selections** (2):

```
REPORT OPTIONS
0 People

1 - Report:  Extract (CSV Format)
             AL,AP,ANY           Portrait
2 - Make Selections
3 - Choose Sort Options
4 - Choose Print/Email options
5 - Change Report Name

6 - Select Count
7 - View Selection
8 - Show generated SQL

9 - Don't keep REPGEN files

[0] - Quit [DEFAULT]

Enter Selection/ID: █
```

This example will show how to find all active students whose major is Animal Sciences.

- 11 You can select majors from the **Academic Program Menu** (8). Student statuses are selected from the **Student Menu** (6):

```
SELECTION MENU
0 People

1 - Biographic Menu           9 - Registration Menu
2 - Geographic Menu          A - Degree Menu
3 - High School Menu         B - Academic History Menu
4 - Test Score Menu          C - Trans. Inst. Menu
6 - Student Menu             D - Applicant Menu
7 - Student Attributes Menu
8 - Academic Program Menu    [0] - Exit [DEFAULT]

Enter Selection: █
```

- 12 When selecting majors, please be certain to enter the major in both the **Major 1** and **Major 2** fields (to account for double majors) and also the **Secondary program menu** (to account for dual degree programs) or your results may not be completely accurate:

```
          Primary Academic Program Menu

1 - Student Term
and 2 - Degree:
and 3 - College:
and 4 - Department:
and 5 - Major 1      ASCI

OR 6 - Major 2      ASCI

and 7 - Minor 1

      8 - Minor 2

and 9 - Concentration:

OR  S - Secondary program menu
    H - Help
    [0] - Exit [DEFAULT]

Enter Selection: █
```

- 13 When selecting items on the **Student Menu**, be aware that if you are searching by term, if you set the **Exact?** flag to **Y**, your results will not include students who do not have a record for that exact term. Term records are only created when there is a change to a student's major, status, level, type, etc. For example: an active Animal Sciences major for Spring 2019 whose record has not changed will not have a Fall 2019 record. If the **Student Term** is 201909 (Fall 2019) and **Exact?** is set to **Y**, this student will not be included in the results.

AS is the status code for active students. Choose this from the **Student Status** menu (7):

```
          Student Selection Menu

1 - Student Term                8 - Student Class
2 -          Exact? N          9 - Student Campus
3 - Student Level              A - Advisor's Name
4 - Student Type              B - Student Residency
5 - Student College 1         C - Student Midterm Letter
6 - OR Student College 2      D - Stdn Academic Standing
7 - Student Status      AS    [0] Exit [DEFAULT]

Enter Selection: █
```

- 14 Press **Enter** until you are back on the **Report Options** screen. You can see how many students match your search criteria by choosing **Select Count** (6):

```
REPORT OPTIONS
 363 People

1 - Report: Extract (CSV Format)
      AL,AP,ANY Portrait
2 - Make Selections
3 - Choose Sort Options
4 - Choose Print/Email options
5 - Change Report Name

6 - Select Count
7 - View Selection
8 - Show generated SQL

9 - Don't keep REPGEN files

[0] - Quit [DEFAULT]

Enter Selection/ID: █
```

To see the list of these 363 individual students, you can choose **View Selection** (7).

- 15 If you set up a report (steps 5-9 above) and want the output emailed to you, select **Choose Print/Email options** (4) from the **Report Options** menu (above) and on the subsequent screen enter the **Recipient's email address** (5):

```
PRINT OPTIONS

1 - Print Queue

2 - Report Header 1
  Extract (CSV Format)
3 - Report Header 2

4 - Print trailer pages?
  N
5 - Recipient's email address
  rjcat@uvm.edu

[0] - Enter Selection: █
```


- 16** When you are ready to run the report press **Enter** until you are back to the **Report Generator** menu and choose **Run Report (6)**:

```
UVM Registrar's Office
REPORT GENERATOR

1 - Report Options
2 - Start Over

3 - Save Query File
4 - Load Query File
5 - List Saved Query File(s)

6 - Run Report
7 - View Report

A - About Repgen
N - Repgen News. Last updated: 2015-12-08 15:17

0 - All done

Enter Selection: 6
```

A copy of the report will also go to your zebra1 root directory.

- 17** For a more in-depth review of available features, please consult this [historical document](#).