STEPS Integration

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SAP Report

1. **STEPS Admin Tool**
   a. To access the "STEPS" admin tool click the "Students" tab at the top of the page. Then click the "Settings" sub tab. Then select the "Documents" admin tool.
   b. Once there you will see a link to the admin tool called "STEPS Integration" by clicking the pencil in the "Customize" column.
   c. Once on the "STEPS Integration" admin tool, you need to enter your "InstitutionLocationID", "Username", and "Password" for each of your campuses. Please contact STEPS directly if you do not have this information. And please make sure your user account has top level admin access (for integration to work).
   d. Once you enter your credentials a "Push to STEPS" button will appear when viewing a transcript. You are able to restrict this button to specific user roles, if you wish to limit who can push transcripts to STEPS. Under the "Roles" heading select which roles should be able to push transcripts to STEPS. And under the "Program Status" heading you can also limit which programs statuses the "Push to STEPS" button should appear for. CampusLogin will hide the button for any program statuses that you do not select.
   e. Any programs that are setup as Non-Vocational will not be included in the push to steps process. This can be done from the "Programs" admin tool, in the "Schedule" section using the field called "Program Delivery"

2. **Pushing a Transcript to STEPS**
   a. Once you enter your settings above you are able to now push a transcript to STEPS.
   b. To push an individual transcript to STEPS. Just go to the program tab of the desired student. Click the "Transcript" button and you will see a button called "Push to STEPS". Simply click that button to push the transcript to STEPS. You will get a response from STEPS saying that it was successful. Or if the push failed you will get a failure response (such as insufficient credits). If you get a response that you do not feel you should be getting, please save the response and contact your CampusLogin account manager for assistance.

c. You are forever able to view the STEPS history when opening the transcript. You will see all previous posts to STEPS in the transcript pop up (as well as the STEPS Report, see #3 below).
d. You are also able to mass push transcript to STEPS by using the mass transcript admin tool. To print and/or push multiple transcripts at once, select "Print Student Transcript" from the "Documents" admin tool on the left navigation of "Students". You can then use the Advanced Search to filter the students you would like, and then you will see a "Push Transcript(s) to STEPS" button to the right of the "Print Student Transcript" button
e. You can then view response from STEPS for each transcript in the STEPS Report (see #3 below).

3. **Viewing STEPS Report**
a. To access the "STEPS" report click the "Students" tab at the top of the page.
b. Then on the "Reporting" flyout on the left navigation select the "STUDENT REPORTS" category.
c. Then select the "Steps Report" to view all the transcripts you have posted to STEPS as well as the response that STEPS sent back.