Approve Multiple Batches

To approve **multiple batches**, complete the following steps:

1. From the **Check Processing** tab, click **Batch Management**. The *Search Batch* page appears.

2. Select or enter the batch search conditions you would like view.

> Under **Batch Search Conditions**, *optional*
>
> > o Select the **OTC Endpoint** you want to **Close** a batch for by checking the box under the **Select** column
>
> Under **Created On Date**, *optional*
>
> > o Enter the **From** and **To** date range

Application Tips

- The **From** and **To Created On Date** must be entered in MM/DD/YYYY format.
- The **Created On Date** range cannot exceed 30 days. Additionally, if more than 1,000 batches are created within 30 days then only the most recent 1,000 batches appear.
- When running a search **with** the default **From** and **To Created On Date** range values, the search results include the most recent 30 days of batches that you have access to view. If more than 1,000 batches are created within the 30 days, then only the most recent 1,000 batches appear.
- When running a search *without* specifying any criteria (with the exception of the **Batch ID** field), the search results include the most recent 30 days of batches that you have access to view. If more than 1,000 batches are created within 30 days, then only the most recent 1,000 batches appear.

> > o Enter the **Batch ID**

Application Tip

If the only search criteria entered is a valid **Batch ID** then only a single result appears regardless of other search criteria specified.

> > o Enter the **Cashier ID**
>
> Under **Batch Status**,
>
> > o Select the **Status** you want to approve by checking the **Closed** box under the **Select** column

3. Click **Search**. The *View Batch* page appears.

4. Click the **Batch ID** hyperlink as shown in Figure 1 . The *View Checks* page appears.

Figure 1. View Batches Page (Approve Multiple Batches)

5. Click the **Item ID** of each scanned check. An image of the check and details of the check appear in the window below.

6. Verify the details are correct and click **Previous** to return to the View Batch page.

7. Select the batches you want to approve by checking the boxes to the left of the **Batch ID**.

8. Click **Approve**. The Approve Batch page appears.

9. Verify that you want to approve the batches and click **Confirm**. The *Approve Batch* page appears with the batch details.

10. Click **Print PDF Report** or **Export** and click **Confirm** to approve the batches.

> **Application Tips**
>
> - After **Print PDF Report** or **Export** is clicked, the **Confirm** button is enabled. The batch is not approved until **Confirm** is clicked.
> - A user may print the PDF report or export the batch list report, regardless if the **Close Batch** and/or **Approve Batch** checkboxes are checked or unchecked. A **Check Capture Supervisor (CCS)** or **Check Capture Administrator (CCA)** can specify the **Batch List Report Print/Export Required During** options under **Advanced Administration**.
> - If the **CCS** or **CCA** checked the **Approve Batch** checkbox under **Advanced Administration**, then the user must print the PDF report or export the batch list report. Afterwards, the user can proceed to approve the batch.
> - If the user is approving multiple batches online and the **Approve Batch** checkbox is checked at any OTCnet endpoint, then the user must print the PDF reports or export the batch list reports. The batch is not approved until **Confirm** is clicked, which is enabled when the **Print PDF Report** or **Export** is clicked.
> - If the user is approving multiple batches online and the **Approve Batch** checkbox is not checked, then the user can approve multiple batches without printing the PDF reports or exporting the batch list reports. **Confirm** is enabled and the user can click to approve the multiple batches.

11. An *Approve Batch* page appears verifying the batches have been approved.

12. Click **Return to Batch Summary**.

Application Tip

- After a batch is approved, the Status changes from **Closed** to **Approved** and The *Approve Batch* page appears with the batch details, except under one of these two scenarios.
- First, if a batch has been designated for summary level classification and the batch classification is not balanced.
- Second, if a batch is designated to be classified at the summary level and it is a Central Accounting Reporting System (CARS)/Government-Wide Accounting (GWA) reporter, and the batch is not classified.
- Under these two scenarios the batch status is **Closed**. After the batch is classified and balanced, the batch can be approved.

Additional Buttons

- Click **Cancel** to return to the OTCnet Home Page. No data is saved.
- Click **Previous** to return to the previous page.
- Click **Activate/Deactivate** to activate or deactivate a batch.
- Click **Close Batches** to close a batch.
- Click **<<First** to go to the first page. (Only appears if there are several pages retrieved for the search results.)
- Click **Next>** to go to the next page. (Only appears if there are several pages retrieved for the search results.)
- Click **Last>>** to return to the last page. (Only appears if there are several pages retrieved for the search results.)
- Click **<<Image** to return to the previous check.
- Click **>>Image** to view the next check.
- Click **Zoom-** to reduce the image size.
- Click **Zoom+** to enlarge the image size.
- Click **Rotate Left** to turn the image to the left.
- Click **Rotate Right** to turn the image to the right.
- Click **Show Item** to view and update the check item details.
- Click **Void** to void a single check item.
- Click **Receipt** to print a receipt.
- Click **Print Item** to print a batch list report.