

Reporting Tools

—Generating a Report by Adding a New Run Control ID for Your BI Publisher Report

BI Publisher reports, using **Query Report Scheduler**, require the use of a **Run Control**, which is a slightly different process than using **PS Query**. The **Run Control** configuration is an essential step in generating a report, as a run control can be used time and again—with minor changes, if necessary—to generate a **BI Publisher** report. The following steps demonstrate how to set up a **Run Control** for the purpose of producing a **BI Publisher report**.

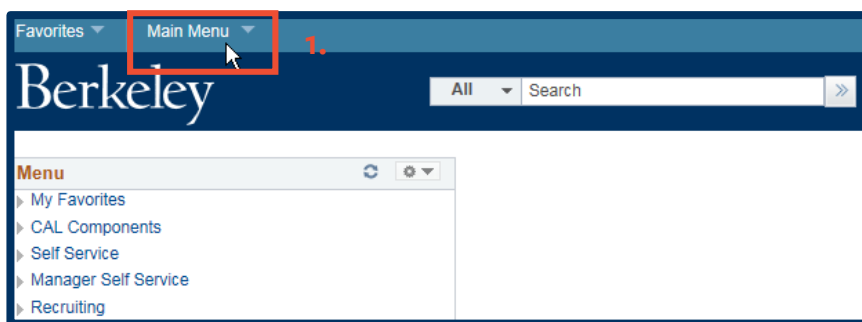
Privacy Disclosure

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You must not release any private student information to any person or organization without the student’s written consent, and must only handle all UCB information for authorized work-related purposes, according to the Minimum Security Standards for Electronic Information (MSSEI).

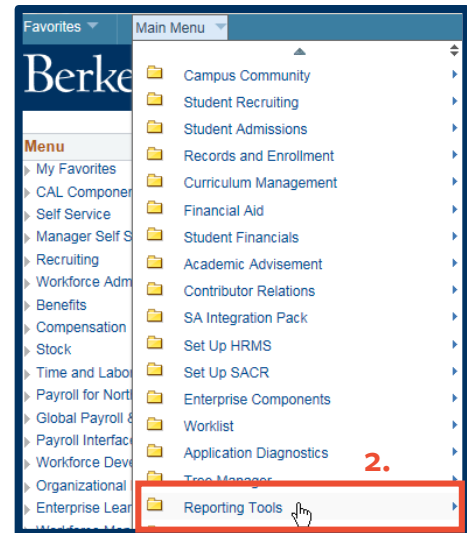
Private student information is considered Level 1 and includes, but is not limited to, academic records, information in personnel files, student conduct issues, SID, certain personal contact information, as well as other sensitive information encountered while on the job. Level 2 information, which if exposed to unauthorized persons, causes extreme impact. It includes but is not limited to Social Security Numbers, Credit Card Numbers and medical information.

1. After you have logged in to *Campus Solutions*, click the **Main Menu** link at the top, left of the window.

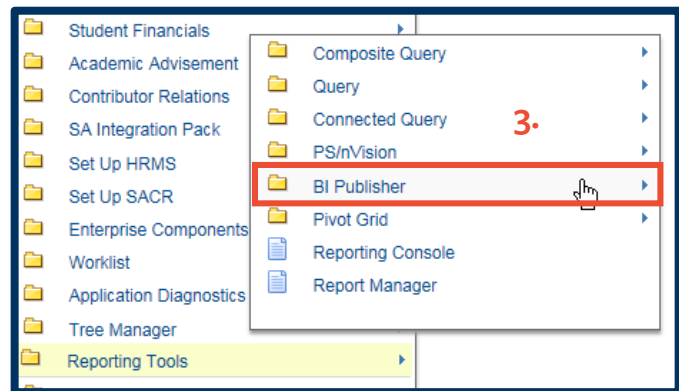


NOTE: Your menu view may be different from the example here, based on your security access and functions.

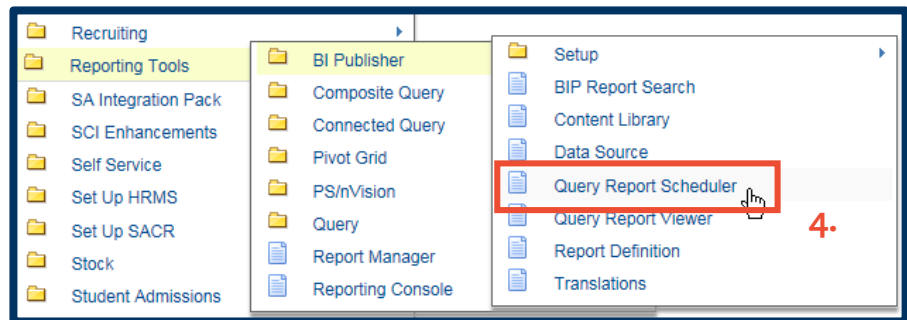
2. Scroll downwards, if necessary, and select **Reporting Tools**.



3. Click the **BI Publisher** link.

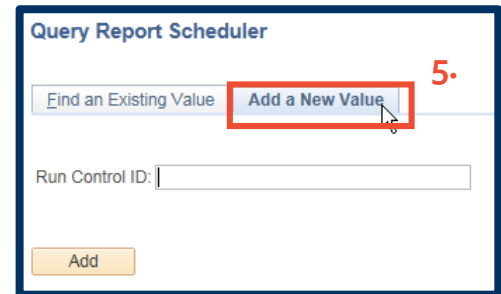


4. Click **Query Report Scheduler**.



The first time you run a **BI Publisher** report using **Query Report Scheduler**, you will use the **Add a New Value** page to create a new run control. Run controls are specific to the user. On the one hand, you need only enter them once, and the user can use the same run control for subsequent report runs, modifying the run control, as needed. Or he/she can generate a run control unique to each report that needs to be generated by giving that run control a name similar to the desired report.

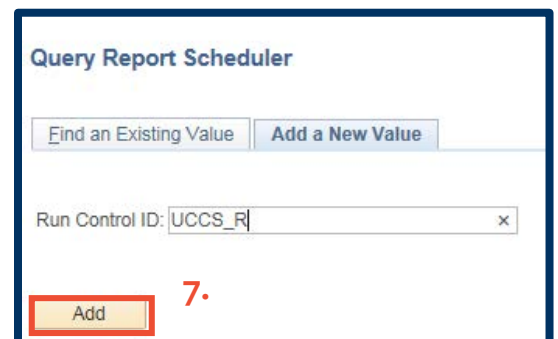
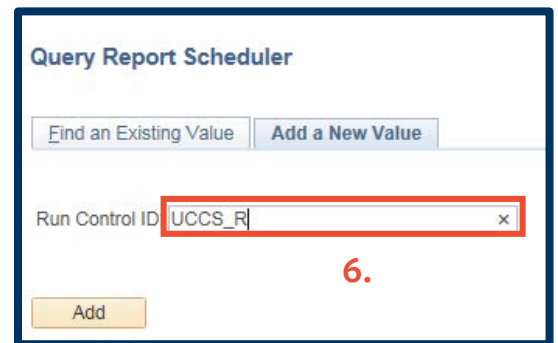
5. In the **Query Report Scheduler** window, click the **Add a New Value** tab.



6. Click in the **Run Control ID** text box, and type a new run control, such as we have done in the example to the right.

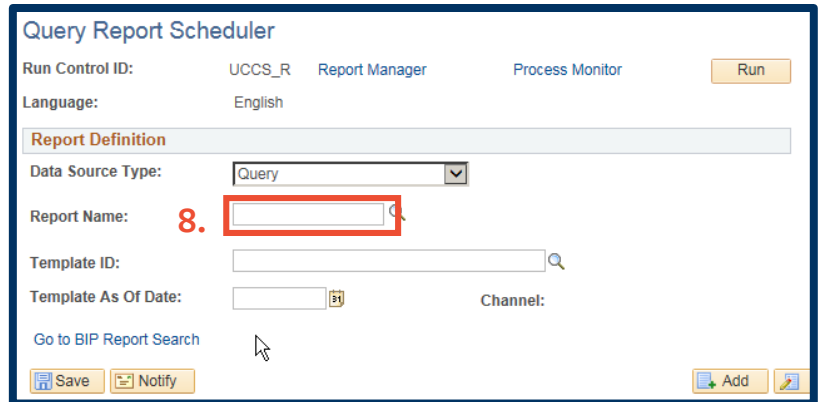
NOTE: Run Control names should not contain spaces, and when emulating the desired report name should not contain special characters.

7. Click the **Add** button.



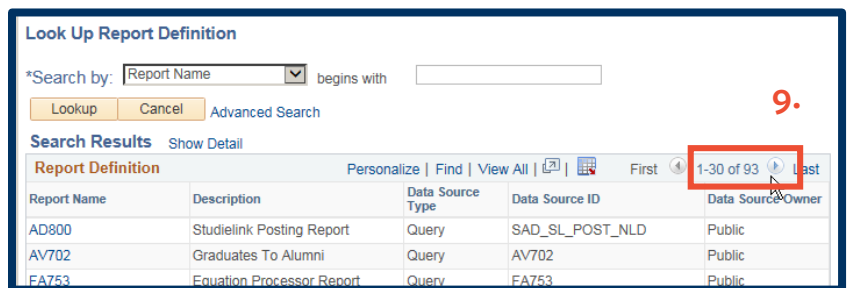
- In the **Query Report Scheduler** window, click in the **Report Name** text box, and then click the **Lookup list** magnifying glass (🔍).

NOTE: In the **Report Name** text box, you could also type the first few characters of the report name, and then select the report from the pop-up list that appears.



- From the **Search Results**, select the required report.

Observe that the **Search Results** page to the right is displaying the first 30 of 93 records, so you may have to click the **Show More Rows** button (▶) to view the part of the **Search Results** list showing the desired report.



To the right we see that we are viewing 61-90 of 93 reports.

Look Up Report Definition

*Search by: Report Name begins with

Lookup Cancel Advanced Search

Search Results Show Detail

Report Name	Description	Data Source Type	Data Source ID	Data Source Owner
SF818E	Trial Balance Corp. by Account	Query	SF818E__TRIAL_BAL_ACCT_ORG	Public
SF818P	Trial Balance Corp. by Account	Query	SF818P__TRIAL_BAL_ACCT_ORG	Public
SF819E	Trial Balance by Corp. Item	Query	SF819E__TRIAL_BAL_ORG_ITEM	Public
SF819P	Trial Balance by Corp. Item	Query	SF819P__TRIAL_BAL_ORG_ITEM	Public
SF820E	Trial Balance by Corporation	Query	SF820E__TRIAL_BAL_ORG	Public
SF820P	Trial Balance by Corporation	Query	SF820P__TRIAL_BAL_ORG	Public
SF828	Open Refunds	Query	SF828	Public
SF829	Refunds by Date	Query	SF829_BI	Public
SF853	Batch Refund	Query	SF853	Public
SR800CA	Class Attendance Report	Query	SR800_CLASS_ATTENDANCE	Public
SR802	Enrollment Verification Report	Query	SR802__ENRL_VER	Public
SR805	Graduation Report Results	Query	SR805__DEGR_RPT_RSLT	Public
SSF_1098_PRT	Batch 1098-T Print	Query	SSF_1098_PRT	Public
TESTCOVERAGE	Test Coverage Report	Query	TESTCOVERAGEREPORT	Public
TESTMAINTRPT	Test Maintenance Report	Query	TESTMAINTREPORT	Public
UCCS_R_001	70/30 Course Sched Compliance	Query	UCCS_R_SC_7030_CLS_SCHED_COMP	Public
UCCS_R_002	GA Assign Hours Report	Query	UCCS_R_SC_GA_ASSIGN_HOURS	Public
UCCS_R_1084	70/30 Class Sched Compliance	Query	UCCS_R_1084_CLASS_SCHED_COMP	Public

9.

- In the **Search Results parameters** window, type the term in the **Term** field, or click the **Lookup** icon, and select the term from the **Lookup list**.

NOTE: In this instance, **Term** and **Institution** are the only required fields.

UCCS_R_1084_CLASS_SCHED_COMP

Institution: UCB01

Career:

Term: **10.**

Acad Group:

Acad Org:

Subject:

Cluster:

OK Cancel

11. Click the **OK** button.

UCCS_R_1084_CLASS_SCHED_COMP

Institution: UCB01

Career:

Term: 2158

Acad Group:

Acad Org:

Subject:

Cluster:

OK Cancel

Ok (Enter)

11.

12. If necessary, change the parameters by clicking the **Update Parameters** link. (When done, click the **OK** button to return to **Query Report Scheduler**.)

Query Report Scheduler

Run Control ID: UCCS_R_1084_1 Report Manager Process Monitor Run

Language: English

Report Definition

Data Source Type: Query

Report Name: UCCS_R_1084 70/30 Class Sched Compliance

Template ID: UCCS_R_1084_1 70/30 Class Sched Compliance

Template As Of Date: Channel:

Update Parameters

Prompt Name	Prompt Value
INSTITUTION	UCB01
ACAD_CAREER	
STRM	2158
ACAD_GROUP	

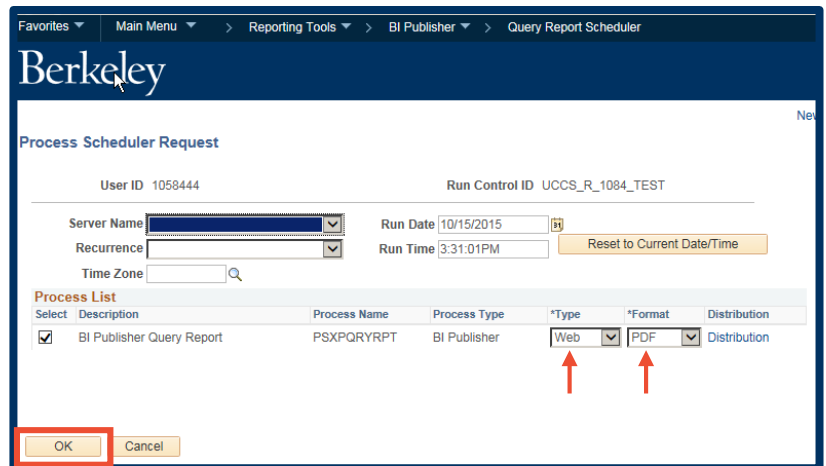
12.

13. Click the **Run** button.

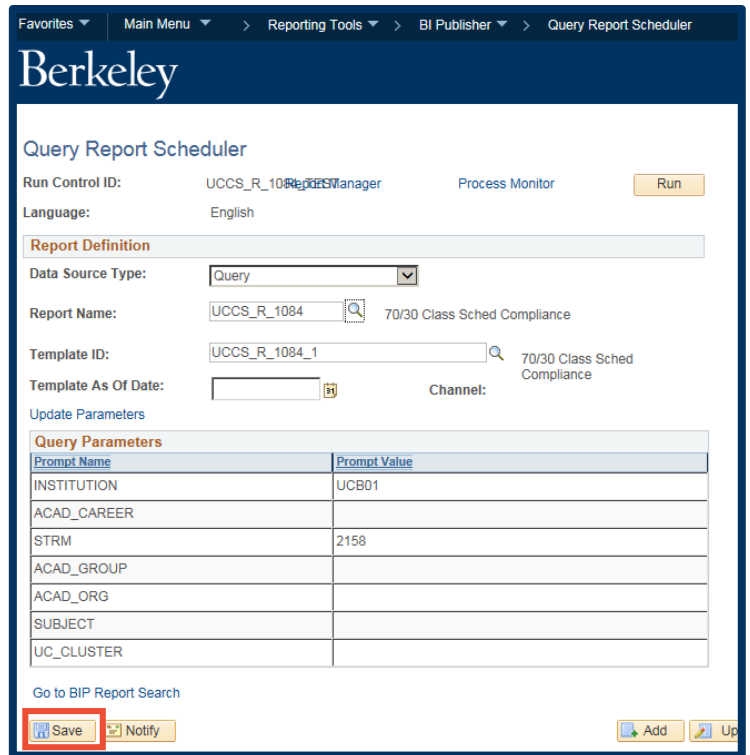


14. After accepting the default configurations for **Type** and **Format**, or changing them, click the **OK** button

14.

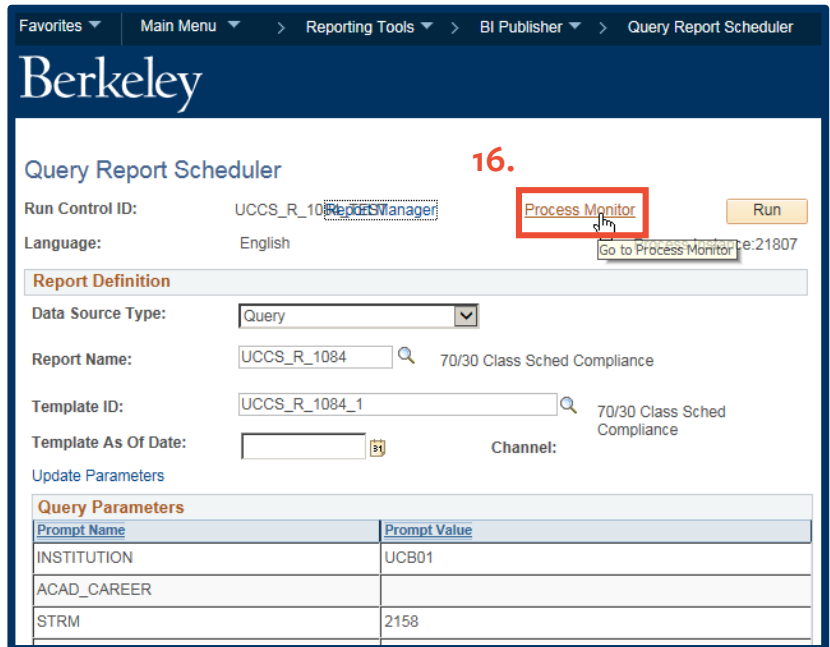


15. Within the **Query Report Scheduler** window, click **Save**.



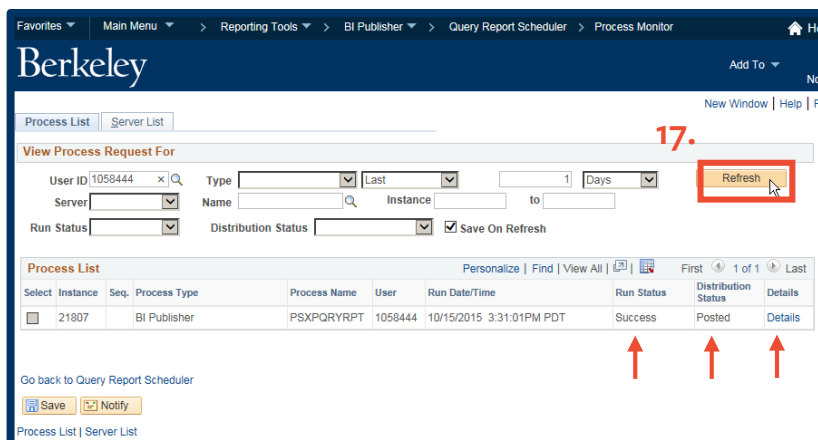
15.

16. Click the **Process Monitor** link.

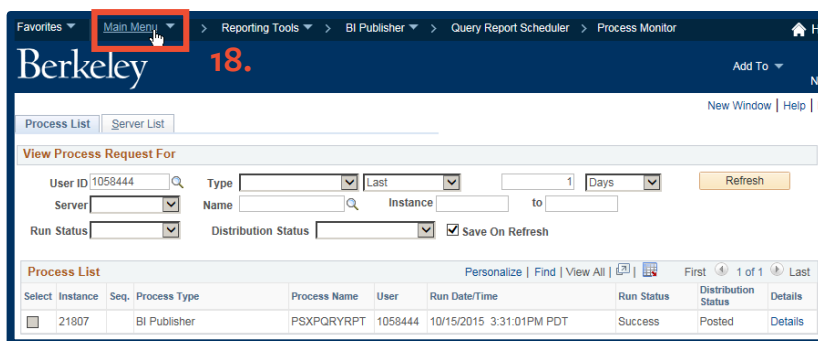


16.

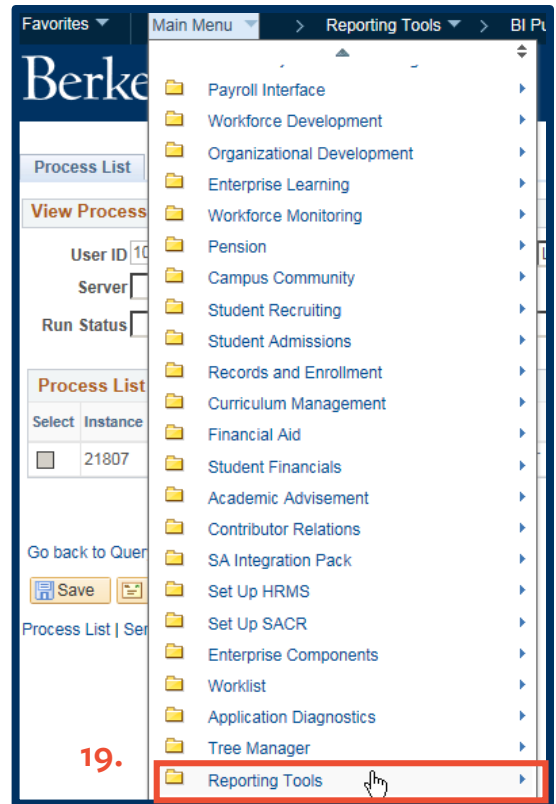
17. **Run Status** should equal **Success**, **Distribution Status** should equal **Posted**, and **Details** should equal **Details**. If not, click **Refresh** before continuing.



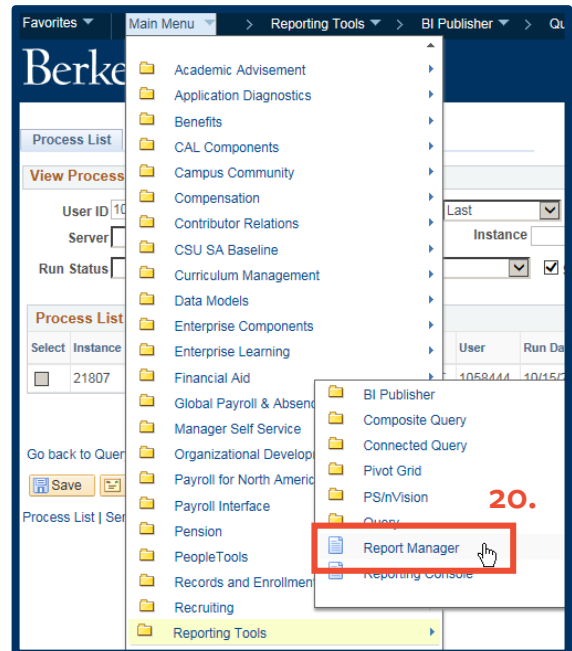
18. Click the **Main Menu** link.



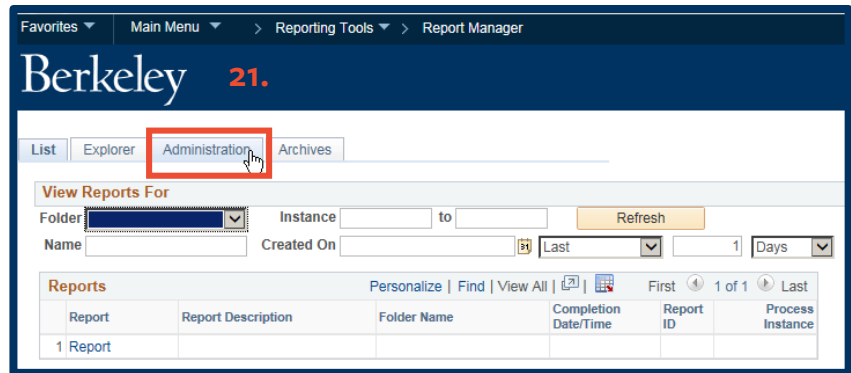
19. Select Reporting Tools.



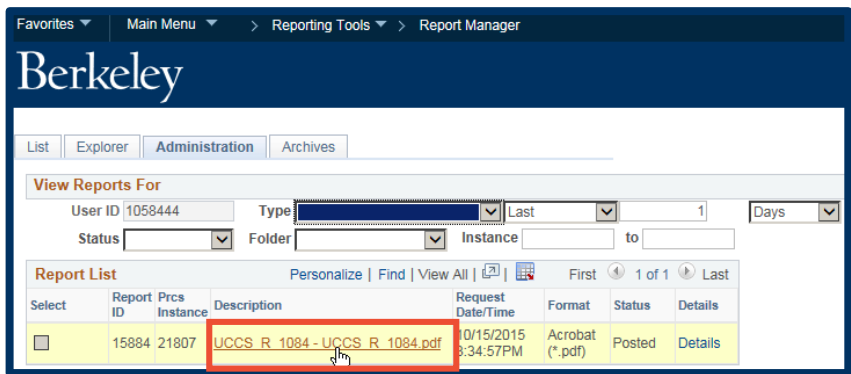
20. Select Report Manager.



- Click the **Administration** tab.



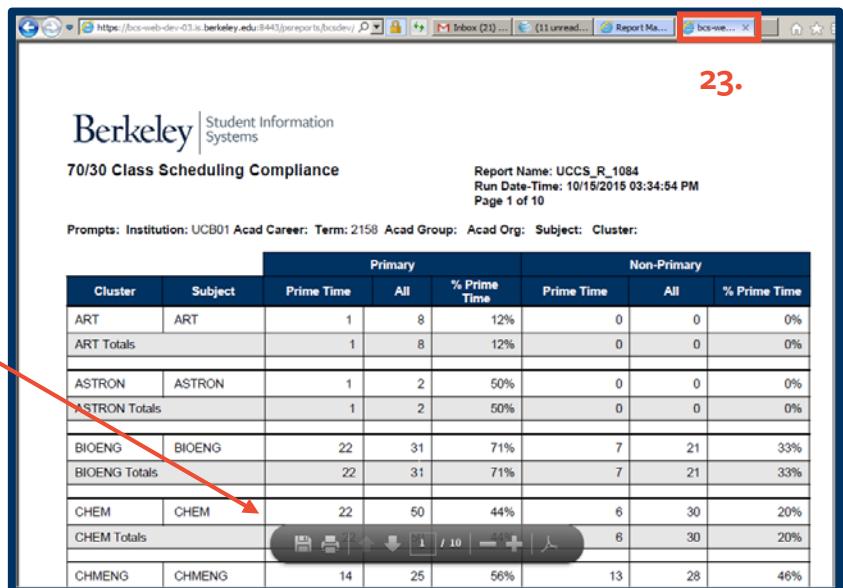
- Click the PDF of the report, shown in the **Report List**. (It should be the top report displayed.)



22.

- Once you select the PDF, that PDF file will appear in a new browser tab or window.

Using the *Acrobat* command bar, you can save or print your report.



23.

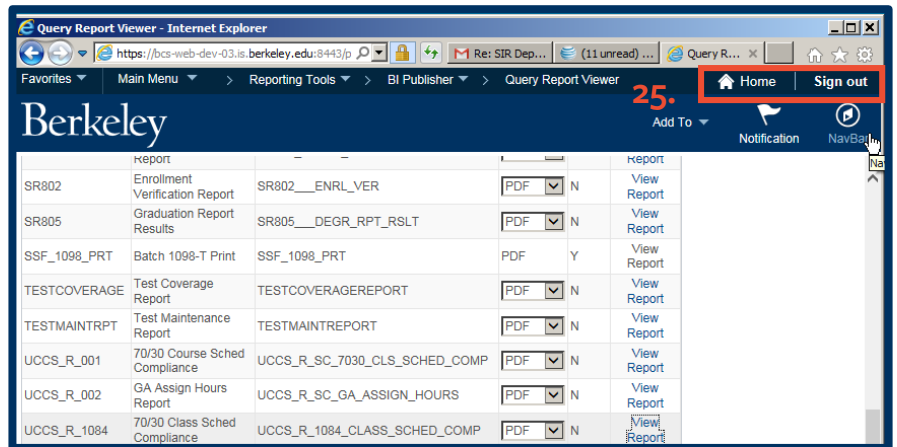
24. When done, close the report's browser tab to exit the report.



24.

25. In the **Navigation Bar** that runs across the top of the window, click the **Home** button to return to *Campus Solutions*' home page, or click **Sign out** to exit *Campus Solutions*.

NOTE: To completely exit *Campus Solutions*, exit your browser, as well, at the end of a browser work session. Do not leave your open browser unattended



Support:

For questions or assistance, please contact Campus Shared Services IT.:

- Call **510-664-9000** (press **option 1**, then **option 2** to reach SIS support)
- Email: itcsshelp@berkeley.edu
- Submit a ticket: https://shared-services-help.berkeley.edu/new_ticket/it