

Reporting on Eligibility Requirements for ASE/GSI Hiring

Path: Reporting Tools > BI Publisher > Query Report Scheduler

and

Path: Reporting Tools > Reporting Manager

The Eligibility Requirement report can be run to find out if students are eligible to be hired into an ASE or GSI position.

First, we will set up a new Run Control since this is our first time running a report, then we will run the report.

Second, we will run the report using an existing run control. Third, we will open the report to view the results.

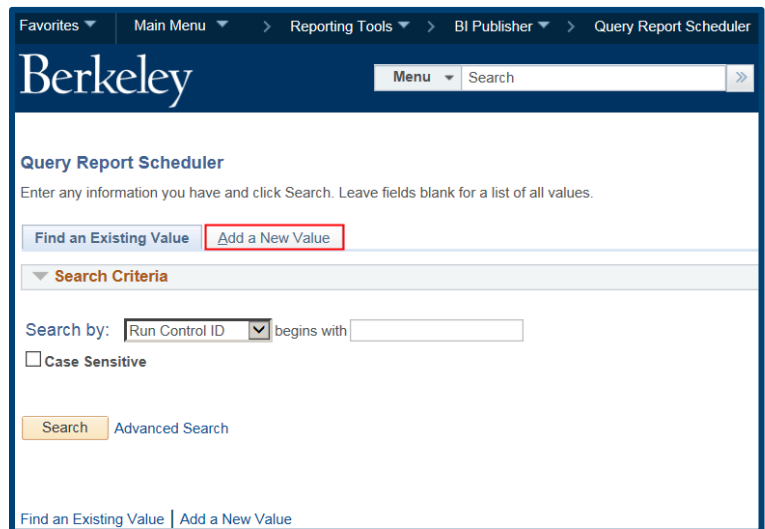
I. Create a Run Control and Run a Report

The first time you run this report you will need to set up a Run Control ID. This is a one-time only step.

After logging into *Campus Solutions*, navigate to **Reporting Tools -> BI Publisher -> Query Report Scheduler**

On the **Query Report Scheduler** page, click on **Add a New Value**.

(Reminder: This is only for the first time you run this report. In the future click **Find an Existing Value**.



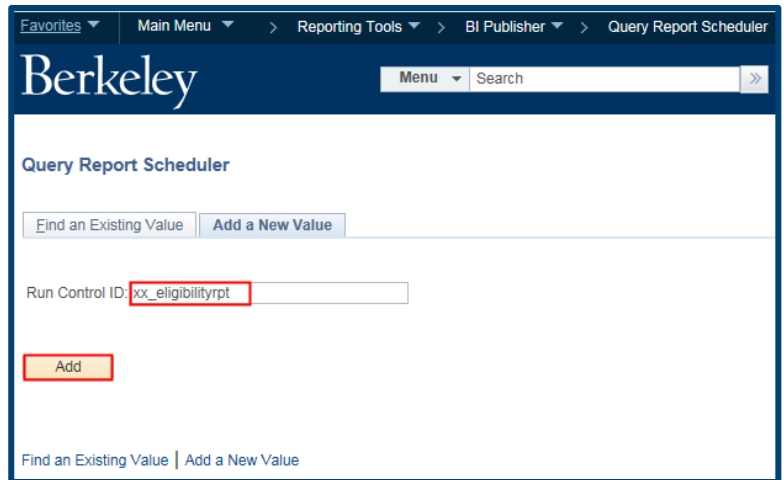
On the **Add New Value** tab page, enter a name for your run control.

Suggestion: “your initials_ descriptor of the report”.

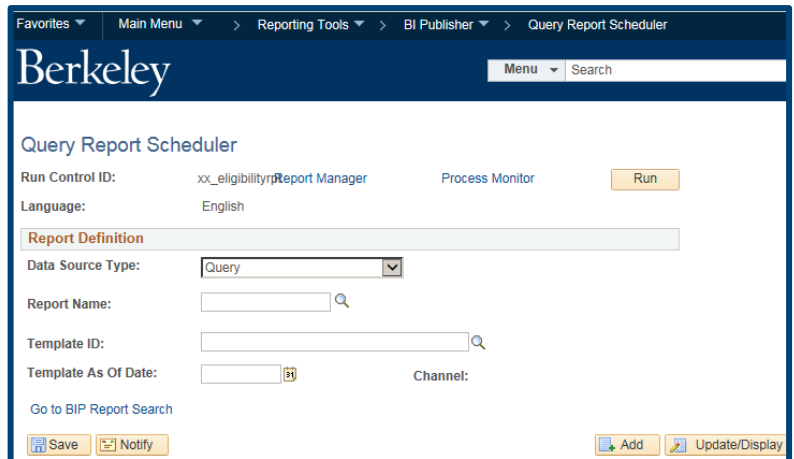
In this example, we have entered “xx_eligibilityrpt”.

Then clicked the **Add** button.

Note: make sure that your Run Control Id does not include spaces or special characters.



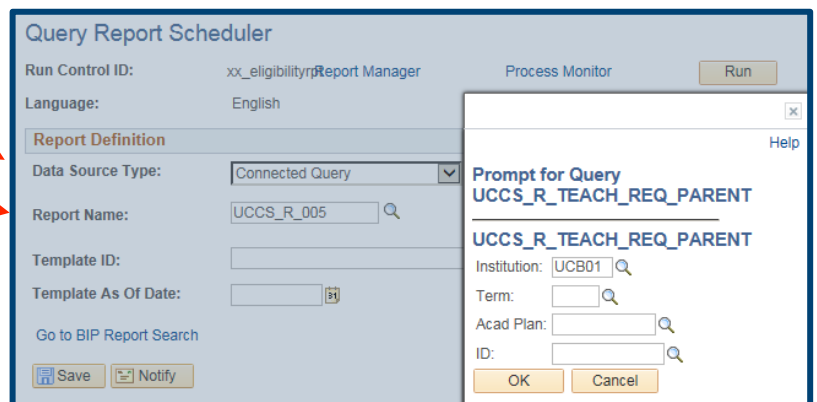
The Query Report Scheduler page will then display the new **Run Control ID** and the run control parameters that will need to be selected.



Select the **Data Source Type** of **Connected Query**.

Enter the **Report Name** of **UCCS_R_005**

Once you enter the report name, the system will bring up a prompt window asking for further information needed for that report.



In the popup window, enter the **Term**. Use the lookup icon to see the available choices. In this example, we have entered **2168** (Fall 2016).

Next, we need to enter an **Academic Plan**. Click the **Lookup Icon**. This will bring up a list of the first 300 values, so use the **Advanced Lookup** link to then search by **Description**.

Academic Plan	Description	Academic Plan Type	Academic Program	Academic Career
00000G	Grad Division Undeclared GR	Major	GACAD	(blank)
00005CCAG	Eng & Busn Sustainability Cert	Grad Cert	GACAD	(blank)
00014CWOG	African American Studies CWO	Major	GNODG	(blank)
00014MAG	African American Studies MA	Major	GACAD	(blank)
00014PHDG	African American Studies PhD	Major	GACAD	(blank)

Academic Plan	Description	Academic Plan Type	Academic Program	Academic Career
25780U	Psychology BA	Major	UCLS	(blank)
00780CPHLG	Psychology CPhil Major		GACAD	(blank)
00780CWOG	Psychology CWO Major		GNODG	(blank)
00780MAG	Psychology MA	Major	GACAD	(blank)
00780PHDG	Psychology PhD	Major	GACAD	(blank)

Click on the **Academic Plan** you want to search.

It will fill in on the prompt window.

Student ID is an optional field. Enter a student ID# if you want to run this report for just one student.

Note: if you run the report for an individual student you will still need to enter the student's Academic Plan. Otherwise the report will return no results.

In this example, we wish to run the report for the entire department, so we will leave this field blank.

When the prompt fields are filled out, click the **OK** button.

We are now back on the **Query Report Scheduler** page. The system has filled in a **Template ID** of **UCCS_R_005_1** and is displaying the parameters we have set up.

We are now ready to run our report.

Click the **Run** button at the top right corner.

Query Name	Prompt Name	Prompt Value
1 UCCS_R_TEACH_REQ_PARENT	INSTITUTION	UCB01
2 UCCS_R_TEACH_REQ_PARENT	STRM	2168
3 UCCS_R_TEACH_REQ_PARENT	ACAD_PLAN	25780U
4 UCCS_R_TEACH_REQ_PARENT	EMPLID	

On the next page that shows, ensure the checkbox for **BI Publisher Query Report** is checked.

Select an output **Type** of **Web**, **Printer**, **Email**, or **File**.

(Recommended: keep the default of **Web**.)

Select a format from **PDF**, **HTM** (html), **XLS** (Excel) or **RTF** (Text file). In this example, we selected **PDF**, but for future reports, select whichever is preferred.

Click the **OK** button at the bottom of the page.

Select	Description	Process Name	Process Type	*Type	*Format	Distribution
<input checked="" type="checkbox"/>	BI Publisher Query Report	PSXPQRYRPT	BI Publisher	Web	PDF	Distribution

The system has assigned a **Process Instance Number** in the top right corner.

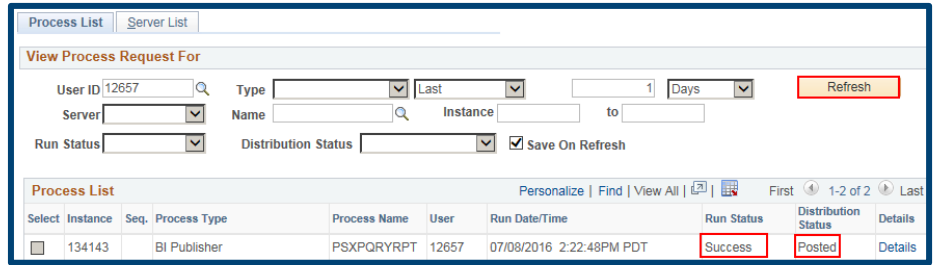
Depending on the criteria entered, running the process may take a few seconds or minutes.

It is not required, but you can click the **Process Monitor** link to check

the status of your query.

You can click the **Refresh** button until the status changes from “**Queued**” to “**Processing**” to “**Success**”. (The status will not update automatically).

The distribution status will show that the report has been posted.



In this example our report has successfully run and been posted, we can now go find and a view the results. That step will be covered below in the “Retrieving and Viewing the Results” section.

II. Running a Report with an Existing Run Control

Once you have run a report once, for all future reports you can use the same Run Control. For more information about searching for and using an **Existing Run Control** see the [related job aid](#).

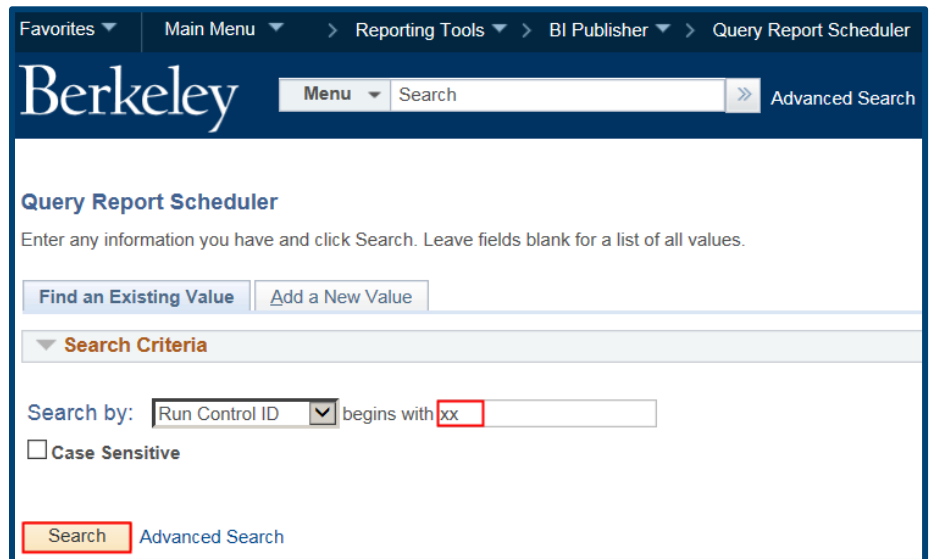
In this example, we will run a report using an existing Run Control.

After logging into *Campus Solutions*, navigate to **Reporting Tools > BI Publisher > Query Report Scheduler**

On the **Query Report Scheduler** page, you should already be on the **Find Existing Value** tab page.

If you remember it, type in your Run Control, or if you don’t remember it you can leave the field blank and search.

In this example, we have entered the first two characters of our **Run Control** and then clicked the **Search** button.



If you had multiple Run Controls, the system would display a list to choose from.

In this example, we only have one Run Control, so we will click on that link.

Query Report Scheduler

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value | Add a New Value

Search Criteria

Search by: Run Control ID begins with xx

Case Sensitive

Search | Advanced Search

Search Results

View All | First | 1 of 1 | Last

Run Control ID	Language Code	Report Name	Data Source Type	Description	Data Source ID
xx_eligibilityrpt	English	UCCS_R_005 Con. Query	Teaching Elig Requirements	UCCS_R_GRAD_TEACH_REQUIREMENTS	

The system will display the parameters last used.

If you want to run the same report, just click the Run button.

To run a different report, click the **Update Parameters** link.

In this example, we want to run the report for a different department, so we will click the **Update Parameters** link.

Query Report Scheduler

Run Control ID: xx_eligibilityrpt | Report Manager | Process Monitor | Run

Language: English

Report Definition

Data Source Type: Connected Query

Report Name: UCCS_R_005 Teaching Elig Requirements

Template ID: UCCS_R_005_1 Teaching Requirements

Template As Of Date: | Channel:

Update Parameters

Query Parameters

Query Name	Prompt Name	Prompt Value
1 UCCS_R_TEACH_REQ_PARENT	INSTITUTION	UCB01
2 UCCS_R_TEACH_REQ_PARENT	STRM	2168
3 UCCS_R_TEACH_REQ_PARENT	ACAD_PLAN	25780U
4 UCCS_R_TEACH_REQ_PARENT	EMPLID	

The prompt window will appear and we will have a chance to enter a **Term, Academic Plan** and if desired, a **Student ID#**.

Remember to use the **Lookup Icon** to search the available options.

In this example we will enter a **Term** of Fall 2016 (**2168**).

Query Report Scheduler

Run Control ID: xx_eligibilityrpt | Report Manager | Help

Language: English

Report Definition

Data Source Type: Connected Query

Report Name: UCCS_R_005

Template ID: UCCS_R_005_1

Template As Of Date: | Update Parameters

Query Parameters

Query Name	Prompt Name	Prompt Value
1 UCCS_R_TEACH_REQ_PARENT	INSTITUTION	
2 UCCS_R_TEACH_REQ_PARENT	STRM	
3 UCCS_R_TEACH_REQ_PARENT	ACAD_PLAN	25780U

Prompt for Query UCCS_R_TEACH_REQ_PARENT

Institution: UCB01

Term:

Acad Plan:

ID:

OK | Cancel

We have clicked on the **Lookup Icon** for **Academic Plan** and are using the **Advanced Lookup** option to search for any plan containing the Description of Engineering.

Look Up Acad Plan

Prompt for Query UCCS_R_TEACH_REQ_P

UCCS_R_TEACH_REQ_P

Institution: UCB01

Term: 2168

Acad Plan:

ID:

OK Cancel

Search by: Academic Plan begins with

Look Up Cancel **Advanced Lookup**

Search Results

Only the first 300 results can be displayed.

View 100 First 1-300 of 300 Last

Academic Plan	Description	Academic Plan Type	Academic Program	Academic Career
00000G	Grad Division Undeclared GR	Major	GACAD	(blank)
00005CCAG	Eng & Busn Sustainability Cert	Grad Cert	GACAD	(blank)
00014CWOG	African American Studies CWO	Major	GNODG	(blank)
00014MAG	African American Studies MA	Major	GACAD	(blank)
00014PHDG	African American Studies PhD	Major	GACAD	(blank)

Look Up Acad Plan

Academic Institution: UCB01

Academic Plan: begins with

Description: contains engineering

Academic Plan Type: =

Academic Program: begins with

Academic Career: begins with

Look Up Clear Cancel Basic Lookup

Search Results

View 100 First 1-59 of 59 Last

Academic Plan	Description	Academic Plan Type	Academic Program	Academic Career
16008U	Engineering Limited UG	Major	UNODG	(blank)
16309U	Engineering Geoscience BS	Major	UCOE	(blank)
16315U	Engineering Physics BS	Major	UCOE	(blank)
162B0U	Engineering Undeclared UG	Major	UCOE	(blank)
16342U	Nuclear Engineering BS	Major	UCOE	(blank)
16337U	Petroleum Engineering BS	Major	UCOE	(blank)
162C6U	Energy Engineering BS	Major	UCOE	(blank)
16330U	Mechanical Engineering BS	Major	UCOE	(blank)

We have chosen to run the report for all of **Mechanical Engineering**, so we will leave the **Student ID** field blank.

When we have finished entering the information, we will click the **OK** button.

Prompt for Query UCCS_R_TEACH_REQ_PARENT

UCCS_R_TEACH_REQ_PARENT

Institution: UCB01

Term: 2168

Acad Plan: 16330U

ID:

OK Cancel

We are now ready to run the report. Click the **Run** button in the top right corner.

Query Report Scheduler

Run Control ID: xx_eligibilityrpt Report Manager Process Monitor **Run**

Language: English

Report Definition

Data Source Type: Connected Query

Report Name: UCCS_R_005 Teaching Elig Requirements

Template ID: UCCS_R_005_1 Teaching Requirements

Template As Of Date: Channel:

Update Parameters

Query Parameters		
Query Name	Prompt Name	Prompt Value
1 UCCS_R_TEACH_REQ_PARENT	INSTITUTION	UCB01
2 UCCS_R_TEACH_REQ_PARENT	STRM	2168
3 UCCS_R_TEACH_REQ_PARENT	ACAD_PLAN	16330U
4 UCCS_R_TEACH_REQ_PARENT	EMPLID	

We confirm our **Process, Output Type** and **Format**.

In this example, we have selected XLS (Excel) for our format.

Then we click the **OK** button.

Process Scheduler Request

User ID 12657 Run Control ID xx_eligibilityrpt

Server Name Run Date 07/08/2016

Recurrence Run Time 5:11:54PM Reset to Current Date/Time

Time Zone

Process List

Select	Description	Process Name	Process Type	*Type	*Format	Distribution
<input checked="" type="checkbox"/>	BI Publisher Query Report	PSXPQRYRPT	BI Publisher	Web	XLS	Distribution

OK Cancel

If desired, we can check on the progress of our report by clicking the **Process Monitor** link.

Query Report Scheduler

Run Control ID: xx_eligibilityrpt Report Manager **Process Monitor** Run

Language: English Process Instance 134169

Report Definition

Data Source Type: Connected Query

Report Name: UCCS_R_005 Teaching Elig Requirements

Template ID: UCCS_R_005_1 Teaching Requirements

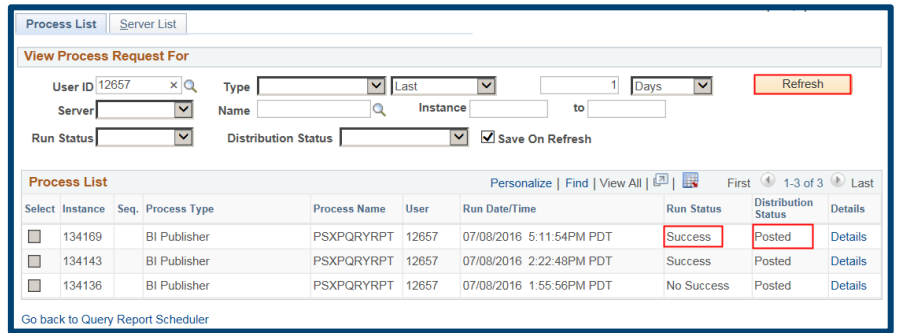
Template As Of Date: Channel:

Update Parameters

Query Parameters		
Query Name	Prompt Name	Prompt Value
1 UCCS_R_TEACH_REQ_PARENT	INSTITUTION	UCB01
2 UCCS_R_TEACH_REQ_PARENT	STRM	2168
3 UCCS_R_TEACH_REQ_PARENT	ACAD_PLAN	16330U
4 UCCS_R_TEACH_REQ_PARENT	EMPLID	

Then we could click the **Refresh** button until we see the report has **Successfully** run and **Posted** the results.

Now we are ready to view the results.



III. Retrieving and Viewing a Report

The results of this report can be viewed by going to the Reporting Manager page.

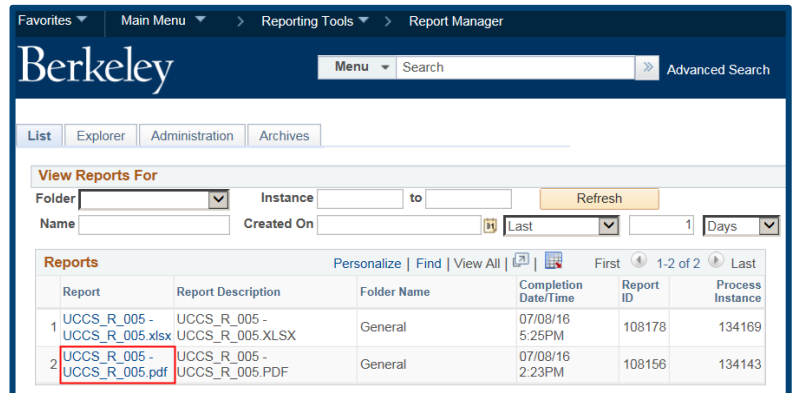
Navigate to **Reporting Tools > Reporting Manager**.

Find your Report by *Report Name* and *Date/Time*, or if you made a note of your *Process Instance* number.

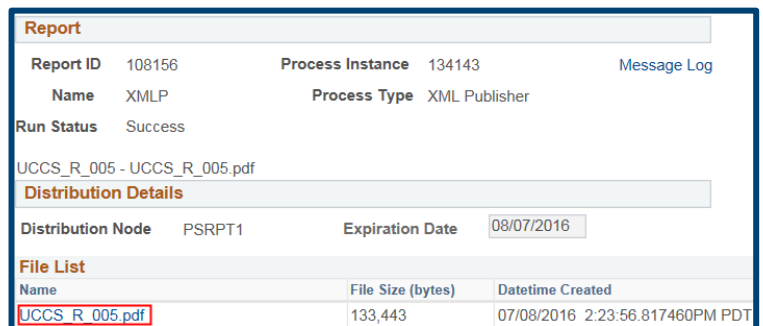
In most cases you will view a report right after running it, so it will usually be the first in your list.

When you have found your report, click on the Report name link.

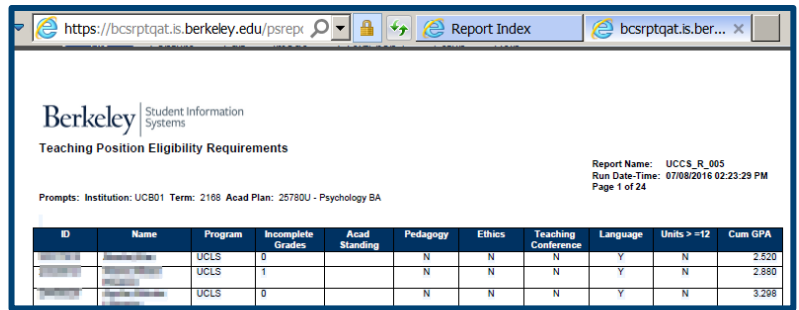
In this example, we have clicked on the 2nd report, in .PDF format.



A new page will display. Click on the file name (in the requested format) to open (and download/save).

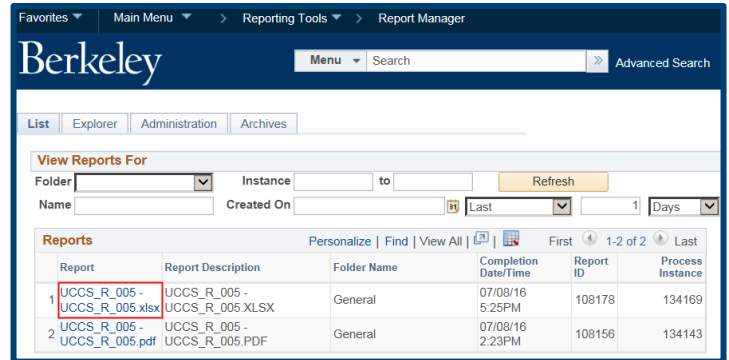


A new window has opened up to display the results in a .PDF that could be downloaded and saved (if appropriate).

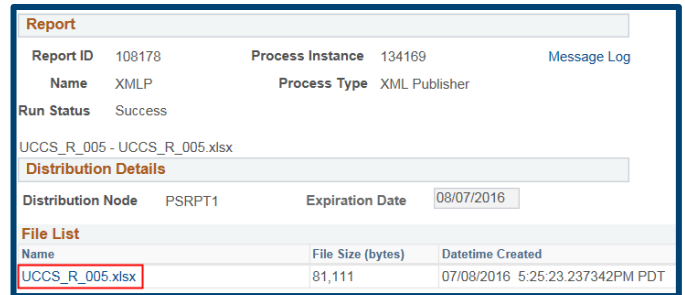


For reports that are run to Excel, it's a similar process.

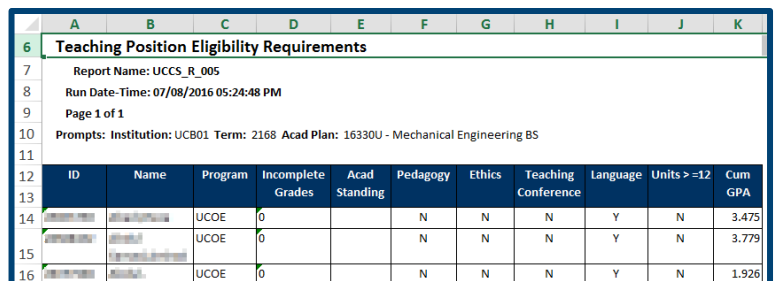
Click the name of the report.



Click the name of the report to open it.



The system will open up a new window and download the results into Excel.



If you are done running reports, close the Report Manager window or click Sign Out. When you are finished, make sure to exit the browser as well. Do not leave open browser windows unattended.

Support:

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

- Call **510-664-9000** (press **option 6** to reach SIS support)
- Email: sishelp@berkeley.edu
- Submit a ticket: https://berkeley.service-now.com/ess/create_incident