

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**.

Favorites ▼ Main Menu ▼ > Reporting Tools ▼ > BI Publisher ▼ > Query Report Scheduler
Berkeley Nenu - Search
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
Search Advanced Search Find an Existing Value Add a New 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.

Eavorites Main Menu Reporting Tools BI Publisher Query Report Scheduler
Berkeley Menu - Search »
Query Report Scheduler
Eind an Existing Value Add a New Value
Run Control ID: xx_eligibilityrpt
Add
Find an Existing Value Add a New Value

Favorites Main Menu	▼ > Reporting Tools ▼	> BI Publisher 🔻 > Query R	eport Scheduler
Berkeley		Menu 👻 S	Bearch
Quary Banart Sala	adular		
Query Report Sch		Dense Marilia	Dur
Run Control ID:	xx_eligibilityrpReport Manager	Process Monitor	Run
Language:	English		
Report Definition			
Data Source Type:	Query	\checkmark	
Report Name:	٩		
Template ID:		Q	
Template As Of Date:	8	Channel:	
Go to BIP Report Search			
Save Notify			📑 Add 🛛 🖉 Update/Display

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.

Query Report Scheduler									
Run Control ID:	xx_eligibilityrpReport Manager	Process Monitor Run							
Language:	English	×							
Report Definition		Help							
Data Source Type:	Connected Query	Prompt for Query UCCS_R_TEACH_REQ_PARENT							
Report Name:	UCCS_R_005	UCCS_R_TEACH_REQ_PARENT							
Template ID:		Institution: UCB01 Q							
Template As Of Date:	iii	Term:							
Go to BIP Report Search		Acad Plan:							
Save Notify		ID: OK Cancel							



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.

	Look Up Ac	ad Plan			
Prompt for Query UCCS_R_TEACH_REQ_P	Search by:	Academic Plan V begins v	vith		Help
UCCS_R_TEACH_REQ_P	Look Up	Cancel Advanced Lookup			
Institution: UCB01 Q	Search Res	ults			
Term: 2168 Q	Only the first 3	00 results can be displayed.			
Acad Plan:	View 100		First 🕚	1-300 of 300	🕑 Last
	Academic Plan	Description	Academic Plan Type	Academic Program	Academic Career
OK Cancel	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 A	cad Plan			×
				Help
Academic Inst	titution:	UCB01		
Academic Pla	n: begins v	vith 🔽		
Description:	contains	psycholo	дy	
Academic Pla	an Type: =	~		~
Academic Pro	gram: begins v	vith 🔽		Q
Academic Car	reer: begins v	vith 🖌		Q
Look Up	Clear	Cancel Basic	Lookup	
Search Res		Cancel Basic		
		Cancel Basic		5 of 5 🕑 Last
Search Res		Cancel Basic Academic Plan Type		of 5 East Academic Career
Search Res View 100 Academic	ults	Academic Plan	First 1.4	Academic
Search Res View 100 Academic Plan 25780U	ults Description	Academic Plan Type Major	First ④ 1-5 Academic Program	Academic Career
Search Res View 100 Academic Plan 25780U 00780CPHLG	Ults Description Psychology BA	Academic Plan Type Major Major	First ① 1-5 Academic Program UCLS	Academic Career (blank)
Search Res View 100 Academic Plan 25780U 00780CPHLG	Ults Description Psychology BA Psychology CPhil	Academic Plan Type Major Major	First 1 Academic Program UCLS GACAD	Academic Career (blank) (blank)

Prompt for Query UCCS_R_TEACH_REQ_PARENT UCCS_R_TEACH_REQ_PARENT Institution: UCB01 Q Term: 2168 Q Acad Plan: 25780U Q ID: Q OK Cancel

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.

1/27/16



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 Report Scheduler							
Run Control ID:	xx_eligibilit	yrpReport Manager	Pr	ocess Monitor	Run		
Language:	English						
Report Definition							
Data Source Type:	Connecte	d Query					
Report Name:	UCCS_R_	_005 🔍 1	Teaching Elig	Requirements			
Template ID:	UCCS_R	_005_1		C Teaching Require	ements		
Template As Of Date:		M	Chann	el:			
Update Parameters							
Query Parameters							
Query Name		Prompt Name		Prompt Value			
1 UCCS_R_TEACH_REG	2_PARENT	INSTITUTION		UCB01			
2 UCCS_R_TEACH_REG	2_PARENT	STRM		2168			
3 UCCS_R_TEACH_REG	PARENT	ACAD_PLAN		25780U			
A LICCS D TEACH DEC		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.

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

Ser	ver Name	V Run [Date 07/08/2016	31		
R	ecurrence	Run T	ime 1:55:56PM	Res	set to Current D	ate/Time
1	Time Zone					
Process	List					
Select D	escription	Process Name	Process Type	*Type	*Format	Distribution
В	I Publisher Query Report	PSXPQRYRPT	BI Publisher	Web	V PDF	 Distribution

Run Control ID:	xx_eligibili	tyrpReport Manager	Process Monitor Ru	IN
Language:	English		Process Instance 134	143
Report Definition				
Data Source Type:	Connecte	ed Query		
Report Name:	UCCS_R	_005 Q Teachir	ng Elig Requirements	
Template ID:	UCCS_R	_005_1	C Teaching Requirements	
Template As Of Date: Update Parameters		Ē	Channel:	
Query Parameters				
Query Name		Prompt Name	Prompt Value	
1 UCCS_R_TEACH_R	EQ_PARENT	INSTITUTION	UCB01	
2 UCCS_R_TEACH_R	EQ_PARENT	STRM	2168	
	EQ_PARENT	ACAD_PLAN	25780U	
3 UCCS_R_TEACH_R				

1/27/16



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.

Proc	ess List	<u>S</u> erv	ver List						
View	Process	Requ	iest For						
	Jser ID 12	657	🔍 Туре		.ast	✓ 1 Day	s 🔽	Refresh	
	Server		✓ Name	Q	Insta	nce to			
Run	Status		Distributio	on Status		Save On Refresh			
							_		
Proc	ess List					Personalize Find View All	리 🔣 Fin	st 🕚 1-2 of 2	Last
Select	Instance	Seq.	Process Type	Process Name	User	Run Date/Time	Run Status	Distribution Status	Details
	134143		BI Publisher	PSXPQRYRPT	12657	07/08/2016 2:22:48PM PDT	Success	Posted	Details

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,	F
navigate to Reporting Tools > BI	T
Publisher > Query Report	-
Scheduler	Г

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.

Favorites ▼ Main Menu ▼ > Reporting Tools ▼ > BI Publisher ▼ > Query Report Scheduler
Berkeley Menu - Search Advanced Search
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 v begins with xx
Search Advanced Search



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.

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.

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

Enter any information you have and click Sea	rch. Leave fields b	lank for a list of all values.		
Find an Existing Value Add a New Val	lue			
Search Criteria				
Search by: Run Control ID V begin: Case Sensitive Search Advanced Search Search Results	s with xx			
View All			First 🕚 1 d	of 1 🕑 Last
Run Control ID Language Code Report Name	Data Source Type	Description	Data Source ID	
xx_eligibilityrptEnglish UCCS_R_005	Con. Query	Teaching Elig Requirements I	JCCS_R_GRAD_TEACH_REQ	UIREMENTS

Query Report Schee	duler				
Run Control ID:	xx_eligibility	yrpReport Manager	P	rocess Monitor	Run
Language:	English				
Report Definition					
Data Source Type:	Connecte	d Query			
Report Name:	UCCS_R_	005	Teaching Elig	Requirements	
Template ID:	UCCS_R	005_1		Carter Teaching Requirer	nents
Template As Of Date:		31	Chann	el:	
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			

Query Report Sche	duler			×
Run Control ID:	xx_eligibilit	yrpReport Manag		Help
Language:	English		Prompt for	r Query
Report Definition			UCCS_R_	TEACH_REQ_PARENT
Data Source Type:	Connecte	ed Query	UCCS_R_1	TEACH_REQ_PARENT
Report Name:	UCCS_R	_005 🔍	Institution:	JCB01 Q
			Term:	Q
Template ID:	UCCS_R	_005_1	Acad Plan:	Q
Template As Of Date:		31	ID:	Q
Update Parameters			ОК	Cancel
Query Parameters				
Query Name		Prompt Name		
1 UCCS_R_TEACH_REC	2_PARENT	INSTITUTION		
2 UCCS_R_TEACH_REC	2_PARENT	STRM		.:
3 UCCS_R_TEACH_REC	PARENT	ACAD_PLAN		25780U



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 A	cad Plan			
Prompt for Query UCCS_R_TEACH_REQ_P	Search by:		vith		Help
UCCS_R_TEACH_REQ_P	Look Up	Cancel Advanced Lookup			
Institution: UCB01 Q	Search Res	ults			
Term: 2168 Q	Only the first 3	00 results can be displayed.			
Acad Plan:	View 100		First 🕚	1-300 of 300	🕑 Last
	Academic Plan	Description	Academic Plan Type	Academic Program	Academic Career
OK Cancel	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 Ac	ad Plan					
Academic Insti	tution:	L	JCB01			
Academic Plan	: begi	ins with 🗸				
Description:	cont	ains 🔽 e	engineeri	ng		
Academic Pla	n Type: =					$\mathbf{\sim}$
Academic Prog	jram: begi	ns with 🗸			Q	
Academic Care	eer: begi	ns with 🗸			Q	
	,					
Look Up	Clear	Cancel	Basic L	ookup		
Search Resu	llts					
View 100				First 🕢	1-59 of 59	Last
Academic Plan	C	escription		Academic Plan Type		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 (JG	Major	UCOE	(blank)
16342U	Nuclear Eng	ineering BS		Major	UCOE	(blank)
16337U	Petroleum E	ngineering B	S	Major	UCOE	(blank)
162C6U	Energy Engi	neering BS		Major	UCOE	(blank)
16330U	Mechanical I	Engineering E	3S	Major	UCOE	(blank)

Help
Prompt for Query UCCS R TEACH REQ PARENT
UCCS_R_TEACH_REQ_PARENT
Institution: UCB01
Term: 2168 🔍
Acad Plan: 16330U × 🔍
ID:
OK Cancel

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.



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

Query Report Sche	duler				
Run Control ID:	xx_eligibilit	yrpReport Manager	Pr	rocess Monitor	Run
Language:	English				
Report Definition					
Data Source Type:	Connecte	d Query			
Report Name:	UCCS_R_	_005	Teaching Elig	Requirements	
Template ID:	UCCS_R_	_005_1		C Teaching Require	ements
Template As Of Date:		81	Chann	el:	
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.

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

User ID 12657		Run Control I	D xx_eligibilit	yrpt	
Server Name	Run D	ate 07/08/2016	31		
Recurrence	V Run Ti	me 5:11:54PM	Re	eset to Current E	Date/Time
Time Zone					
Process List					
Select Description	Process Name	Process Type	*Туре	*Format	Distributi
BI Publisher Query Report	PSXPQRYRPT	BI Publisher	Web	V XLS	 Distributi

Query Report Sche	duler				
Run Control ID:	xx_eligibilit	yrpReport Manager	P	rocess Monitor	Run
Language:	English			Process Inst	ance:134169
Report Definition					
Data Source Type:	Connecte	d Query			
Report Name:	UCCS_R_	005 🔍 -	Teaching Elig	Requirements	
Template ID:	UCCS_R	005_1		Teaching Requir	rements
Template As Of Date:		31	Chann	el:	
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.

	100033	Requ	lest For							
U	Iser ID 12	657	×Q	Туре		ast	✓ 1)ays 🔽	Refresh	۱
	Server		~	Name	Q	Insta	nce to			
				Distribut	an Cantur -		Save On Refresh			
Run	Status			Distribut	ion Status		Save On Refresh			
_										0
Proc	ess List						Personalize Find View Al	ı 💷 🔣 🛛 Fir	st 🕚 1-3 of 3	3 🕑 La
	ess List	Seq.	Process Type		Process Name	User	Personalize Find View Al Run Date/Time	Run Status	st ① 1-3 of 3 Distribution Status	B Details
		Seq.	Process Type BI Publisher		Process Name PSXPQRYRPT	User 12657			Distribution	
Select	Instance	Seq.					Run Date/Time	Run Status	Distribution Status	Details

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).

Berkel	ey	Menu - Search	1	>> Adv	anced Sear
ist Explorer View Reports F Folder Name	For	tance to ed On	Re III Last	f <mark>resh</mark>	Days
		Personalize Find	View All 💷 🔢	First 🕚 1-2 of	2 🕑 Last
Reports					Process
Reports Report	Report Description	Folder Name	Completion Date/Time	Report ID	Instance
Report		Que est			

Report						
Report ID	108156		Process Instance 134143			Message Log
Name	XMLP		Process Type	XML Pu	blisher	
Run Status	Succe	SS				
UCCS_R_005	- UCCS	S_R_005.pdf				
Distributio	n Detai	ls				
Distribution	Node	PSRPT1	Expiration	Date	08/07/2016	
File List						
Name			File Size (I	oytes)	Datetime Crea	ated
UCCS R 00	5.pdf		133,443		07/08/2016	2:23:56.817460PM F



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

🥭 http	s://bcsrptqat.is	s.berkeley.ed	lu/psrepc 🔎		😽 🙋 R	eport Ind	ex	🥭 bcsrp	otqat.is.ber.	×
	Reley Studer		ments							
	,									
Prompts: Ir	nstitution: UCB01 Te	erm: 2168 Acad	Plan: 25780U - F	sychology BA				Report Name: Run Date-Tim Page 1 of 24	: UCCS_R_00 ie: 07/08/2016 (
Prompts: Ir	nstitution: UCB01 Te Name	erm: 2168 Acad	Plan: 25780U - F Incomplete Grades	sychology BA Acad Standing	Pedagogy	Ethics	Teaching Conference	Run Date-Tim		
			Incomplete	Acad	Pedagogy N	Ethics N		Run Date-Tim Page 1 of 24	ue: 07/08/2016(02:23:29 PM
D	Name	Program	Incomplete Grades	Acad			Conference	Run Date-Tim Page 1 of 24 Language	units > =12	2:23:29 PM Cum GPA

Reporting Tools
Report Manage

Menu - Search

Advanced Search

Berkeley

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.

View Reports For Folder		Instance	to		Refresh		
Name		Created On		E Last		1 Days	
Reports			Personalize Find \	/iew All 💷 📑	First 🕢 1	-2 of 2 🕑 L	ast
Report	Report Des	cription	Folder Name	Completi Date/Tim	ion Report	Pro	ces
1 UCCS_R_005 - UCCS_R_005.x	UCCS_R_		General	07/08/16 5:25PM	108178	3 134	416
2 UCCS_R_005 - UCCS_R_005.p	UCCS_R_	005 -	General	07/08/16 2:23PM	108156	6 134	414
Report Report ID Name Run Status	108178 XMLP Success	F	Process Instance Process Type	134169 XML Publisher	Me	ssage Log	
Report ID Name	XMLP Success 5 - UCCS_R				Me	ssage Log	
Report ID Name Run Status UCCS_R_005	XMLP Success 5 - UCCS_R n Details			XML Publisher		ssage Log	
Report ID Name Run Status UCCS_R_000 Distributio Distribution File List	XMLP Success 5 - UCCS_R n Details	_005.xlsx	Process Type Expiration I	XML Publisher	016	ssage Log	
Report ID Name Run Status UCCS_R_004 Distributio Distribution File List Name	XMLP Success 5 - UCCS_R n Details Node P:	_005.xlsx	Process Type Expiration I File Size (by	XML Publisher	016 ne Created		PI
Report ID Name Run Status UCCS_R_000 Distributio Distribution File List	XMLP Success 5 - UCCS_R n Details Node P:	_005.xlsx	Process Type Expiration I	XML Publisher	016		PE
Report ID Name Run Status UCCS_R_004 Distributio Distribution File List Name	XMLP Success 5 - UCCS_R n Details Node P:	_005.xlsx	Process Type Expiration I File Size (by	XML Publisher	016 ne Created		PI

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.

JCOE

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