Reporting Tools: Searching for an existing Run Control ID and Running a 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** is an essential step, as it can be used time and again—with minor changes, if necessary—to generate a **BI Publisher** report. The following steps demonstrate how to search for and utilize an **existing Run Control** for the purpose of producing a **BI Publisher report**.

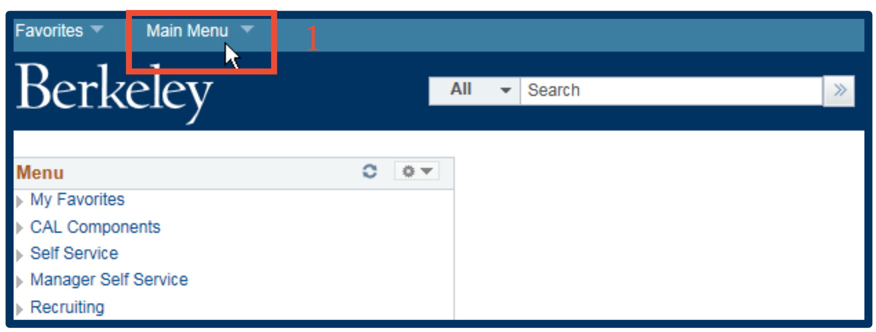
Privacy Disclosure

Disclosure of information from student records is governed by the Federal Family Educational Rights and Privacy Act (FERPA) and in part by the State of California Education Code. UCB maintains a campus policy governing disclosure of information from student records. This policy provides reasonable interpretations of those laws and protects the student's right of privacy as guaranteed by the State of California's constitution. For more information, the entire policy can be found at: http://registrar.berkeley.edu/ferpa.html.

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).

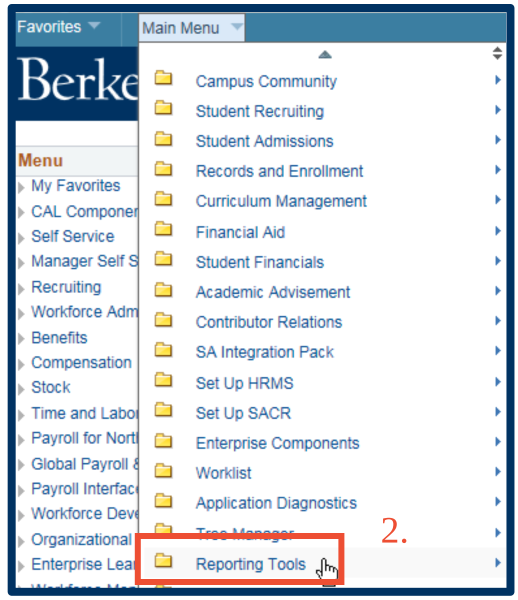
Private student information is considered Level 1 and includes, but is not limited to, academic records, information in personnel files, student conduct issues, SID, certain personal contact information, as well as other sensitive information encountered while on the job. Level 2 information, which if 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.

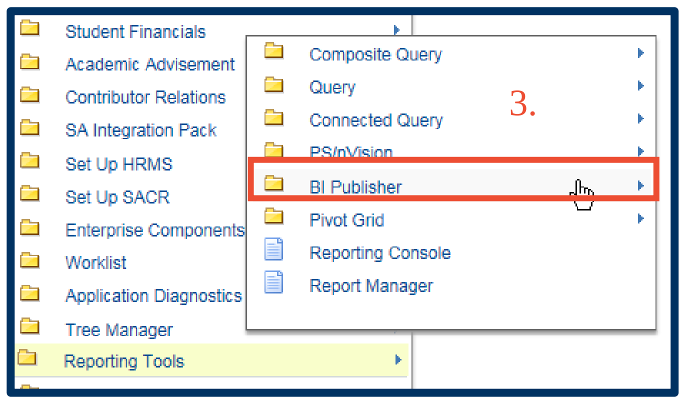


NOTE: Your menu view may be different from the example here, based on your security access and functions.

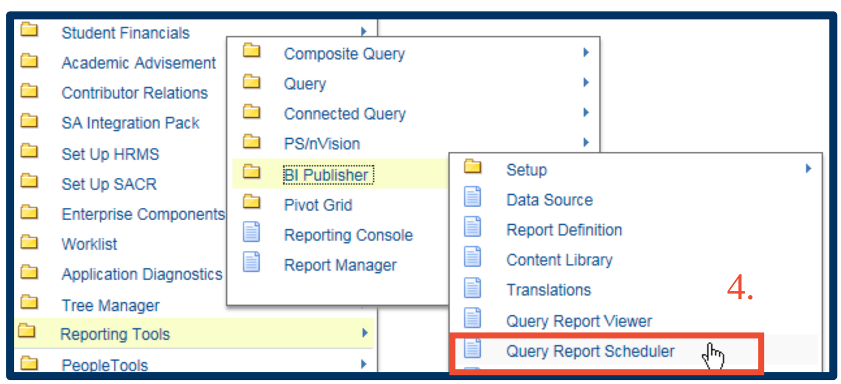
2. Scroll downwards and select **Reporting Tools**.



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



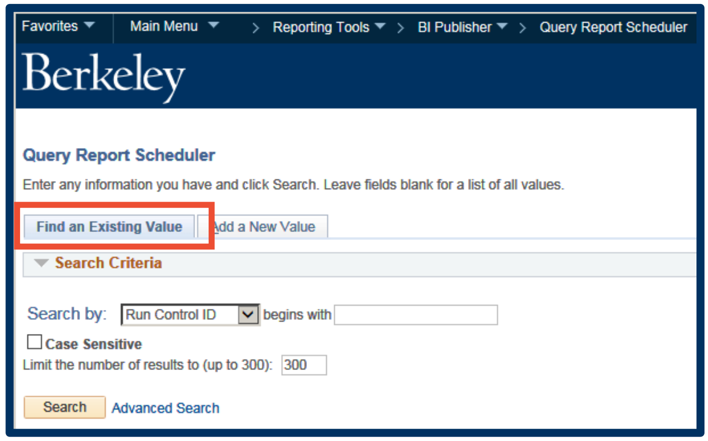
4. Click **Query Report Scheduler**.



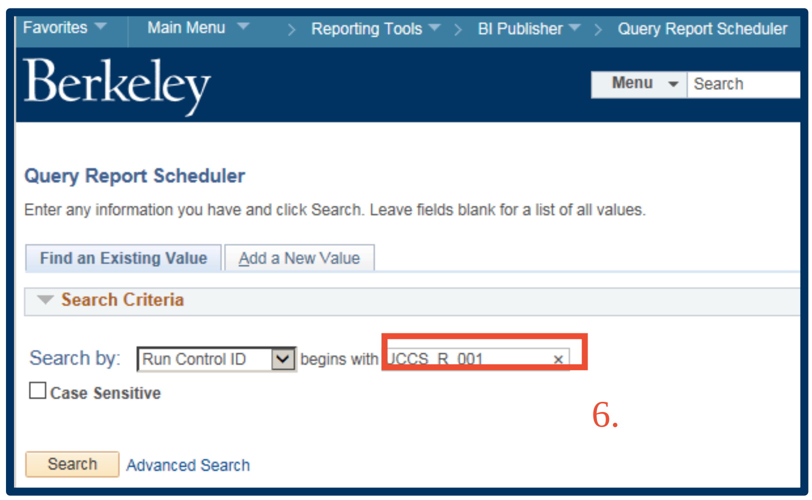
The first time you run a **BI Publisher** report using **Query Report Scheduler,** you will use the **Add a New Value** page to create a new run control. Once a Run Control has been saved, however, it will be available for use time and time again and can be run as is or reconfigured. Run controls are specific to the user.

5. Once you have selected **Query Report Scheduler**, you will arrive at the **Query Report Scheduler** window and the **Find an Existing Value** tab.

5.

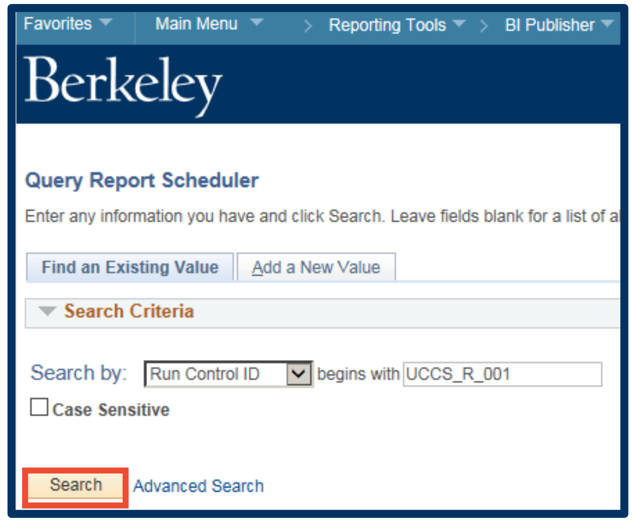


6. Click in the "**begins with**" **Run Control ID** text box, and type all or part of an existing run control, such as we have done in the example to the right.



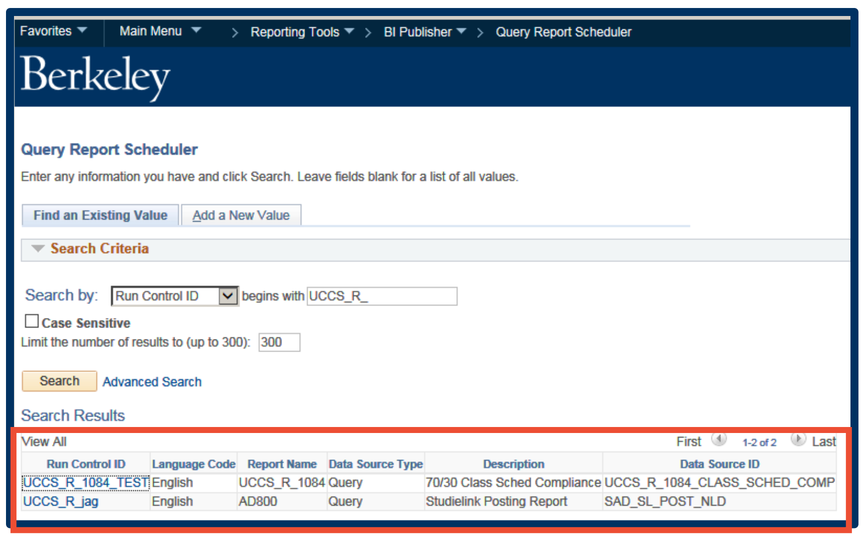
7. Click the **Search** button. Then the **Query Report Scheduler's** run control parameters window appears for the associated report. (See Step 8.)

7.

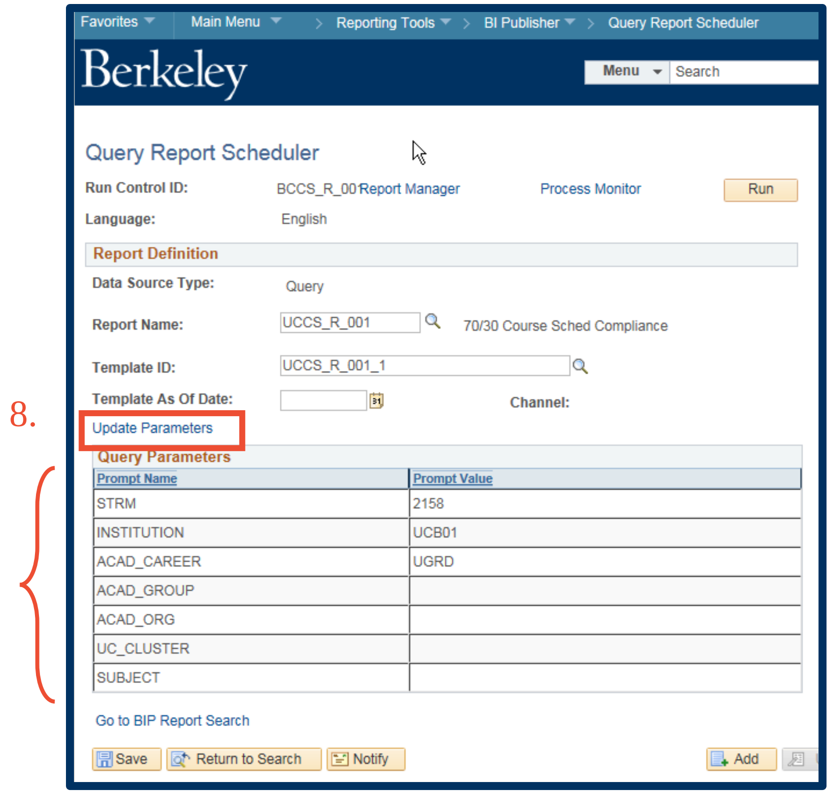


NOTE: If you type *part* of a run control, a list will appear from which you can select the desired run control ID.

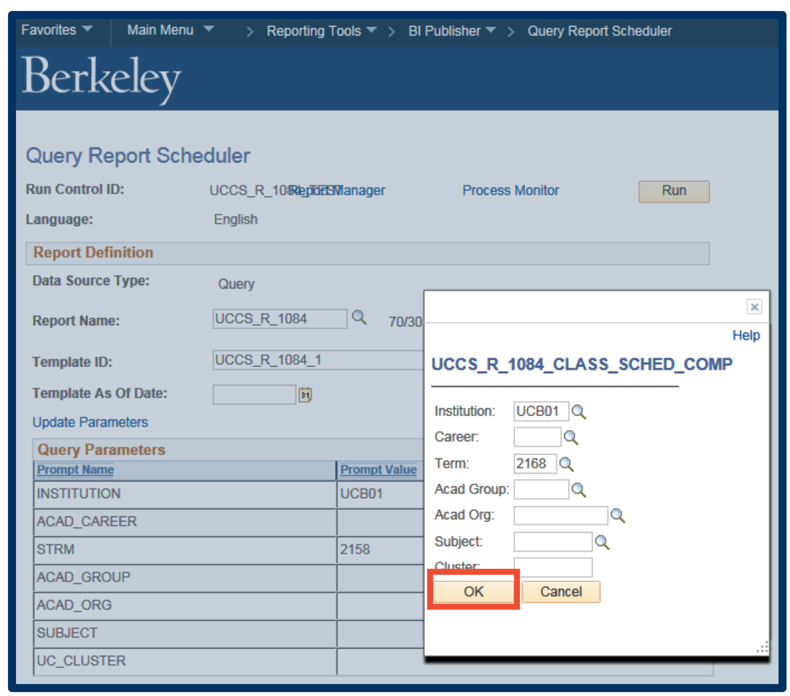
7.



8. Observe that the **Query Report Scheduler** window is reconfigured to display the query's parameters. From this window, you can choose the **Update Parameters** link before continuing.

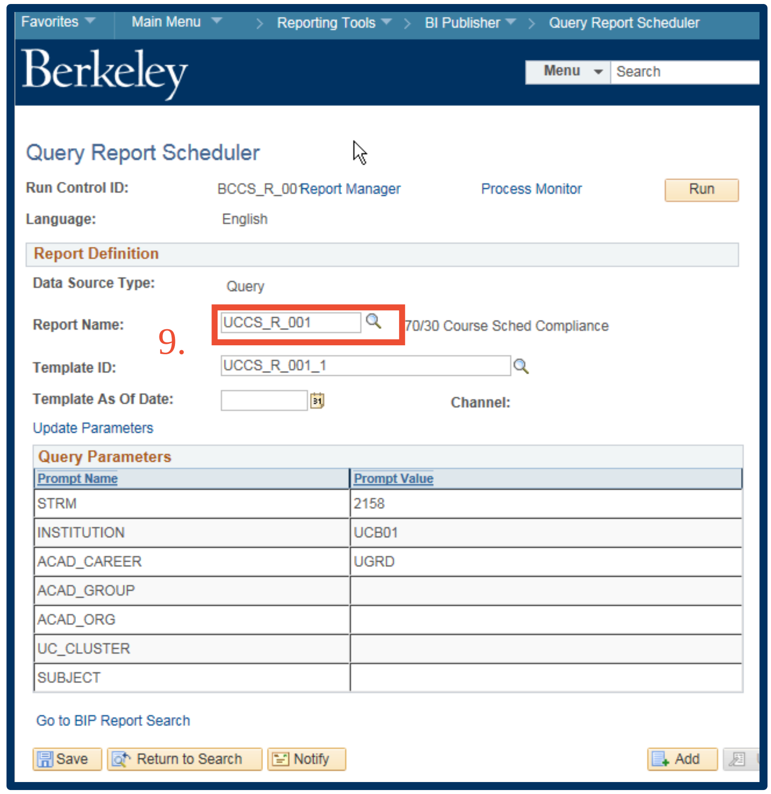


Change the parameters, if necessary, and then click the **OK** button to return to the Query Report Scheduler window.

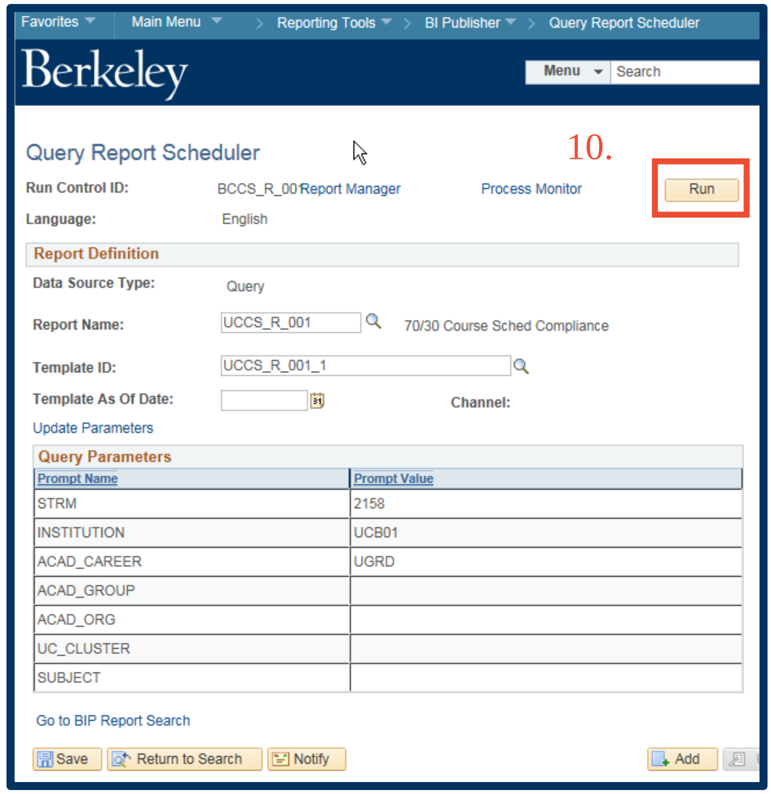


9. Back in the **Query Report Scheduler** window, note that the **Report Name** field is already populated. That is because that report has been previously saved to the run control ID you entered in Step 6.

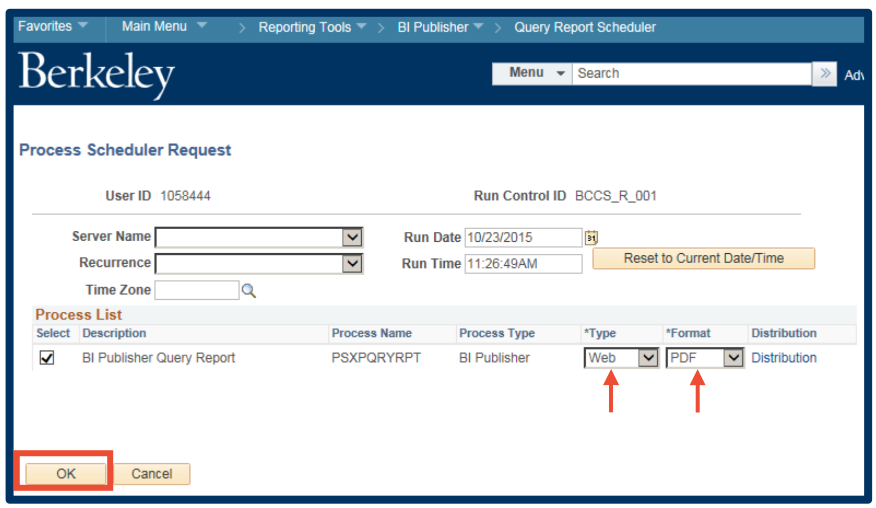
   NOTE: In the **Report Name** text box, you could also search for a different report by clicking the Lookup list icon or typing the first few characters of the report name, and then select a different report from the list that appears.



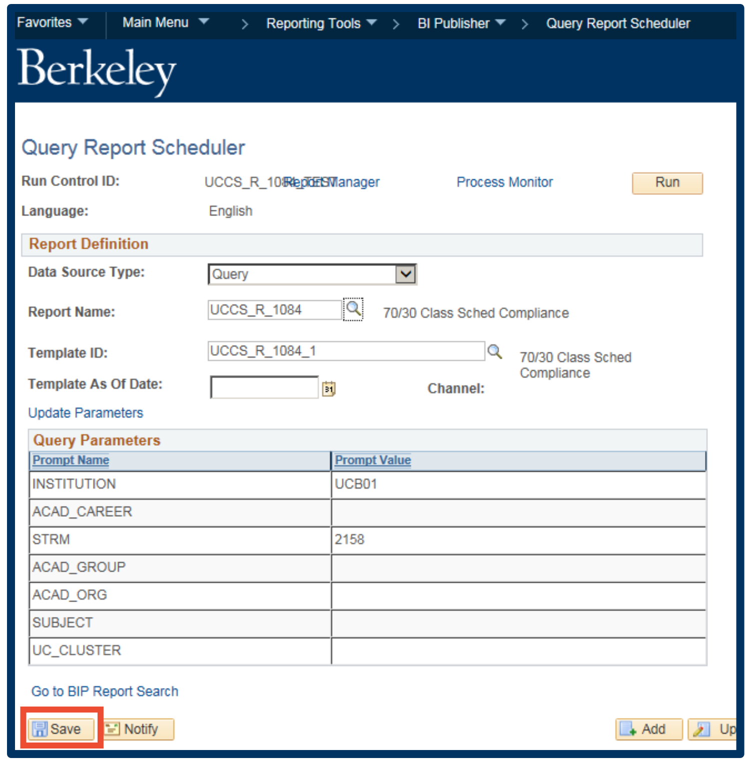
10. Click the **Run** button.



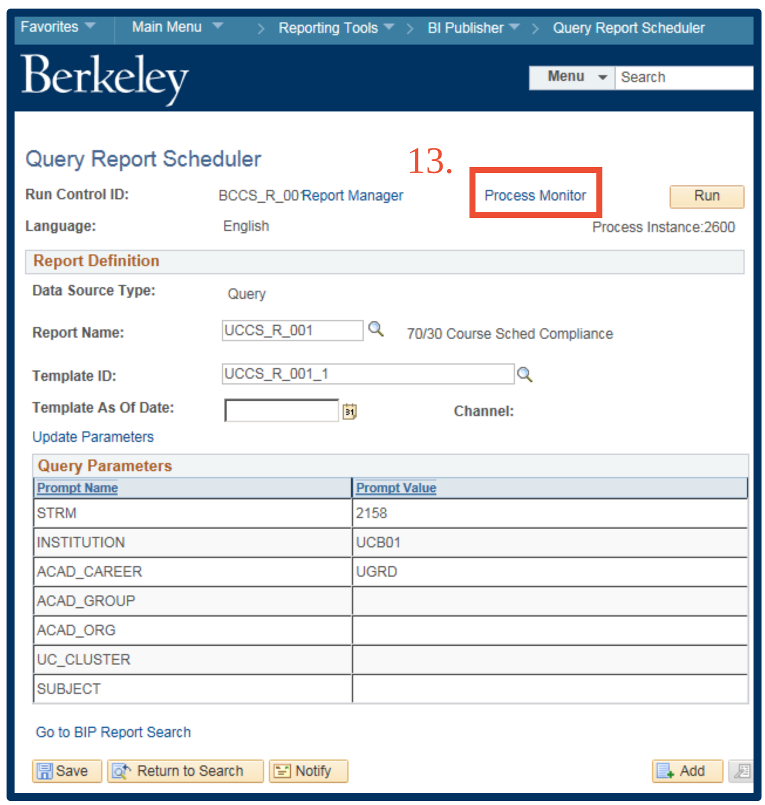
11. After accepting the default configurations for **Type** and **Format**, or changing them, click the **OK** button



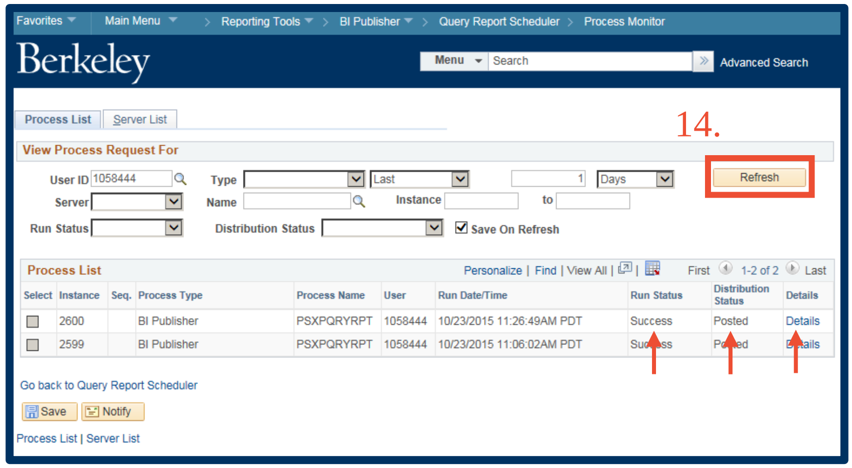
12. Within the **Query Report Scheduler** window, click **Save**, if you have made any changes to the parameters you wish to keep (to be associated with the run control ID).



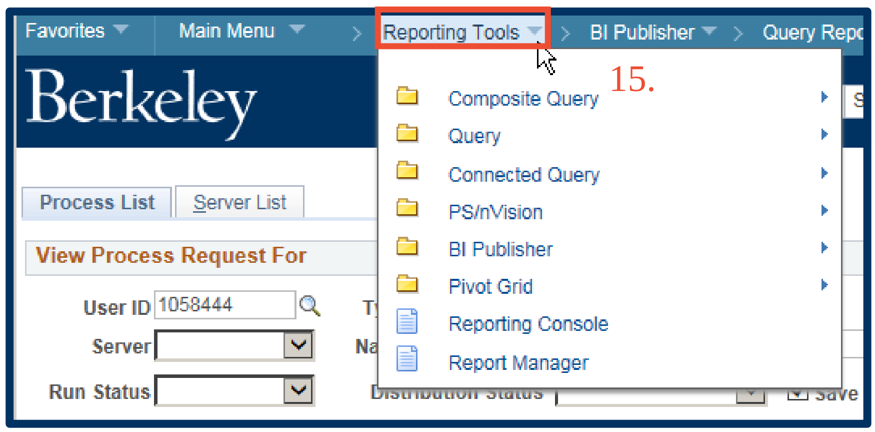
13. Click the **Process Monitor** link.



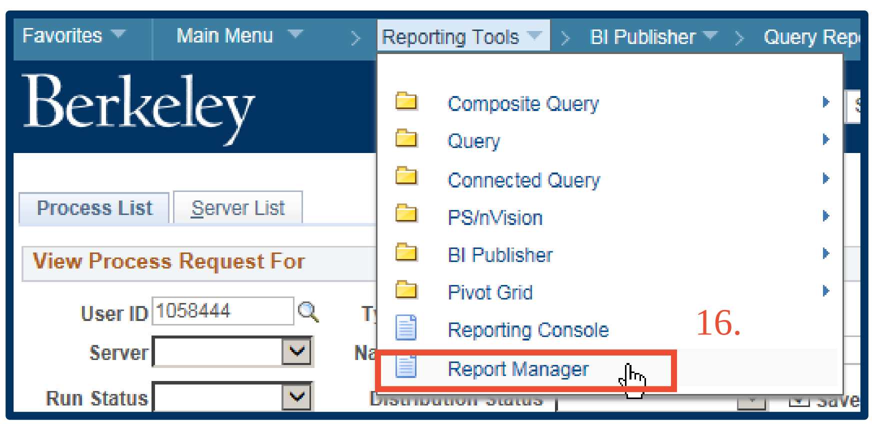
14. **Run Status** should equal **Success**, **Distribution Status** should equal **Posted**, and **Details** should equal **Details**. If not, click **Refresh** before continuing.



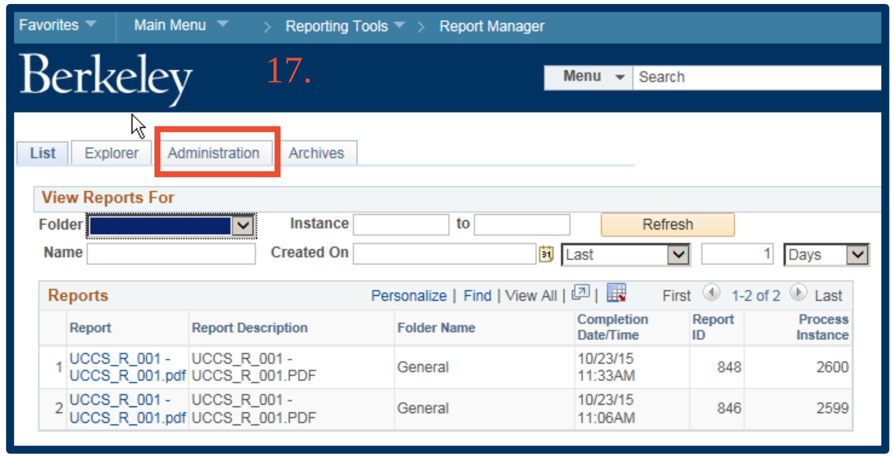
15. From the Navigation Bar, click the **Reporting Tools** link.



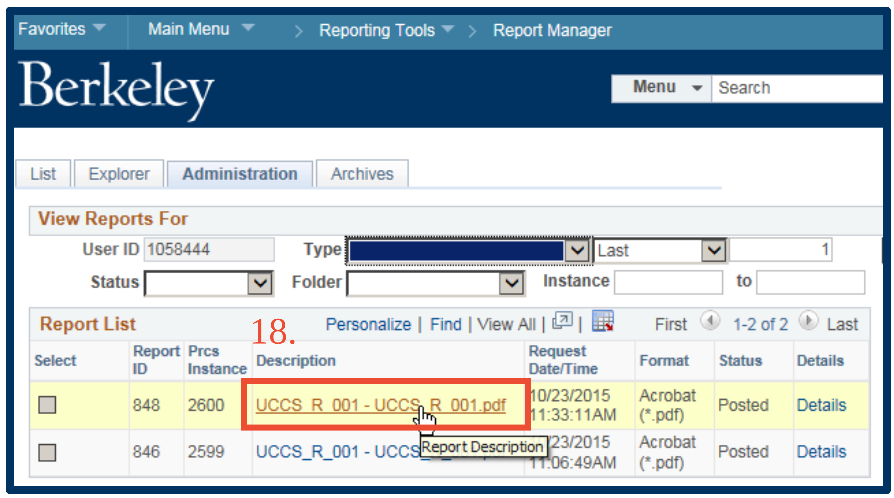
16. Select **Report Manager**.



17. Click the **Administration** tab.

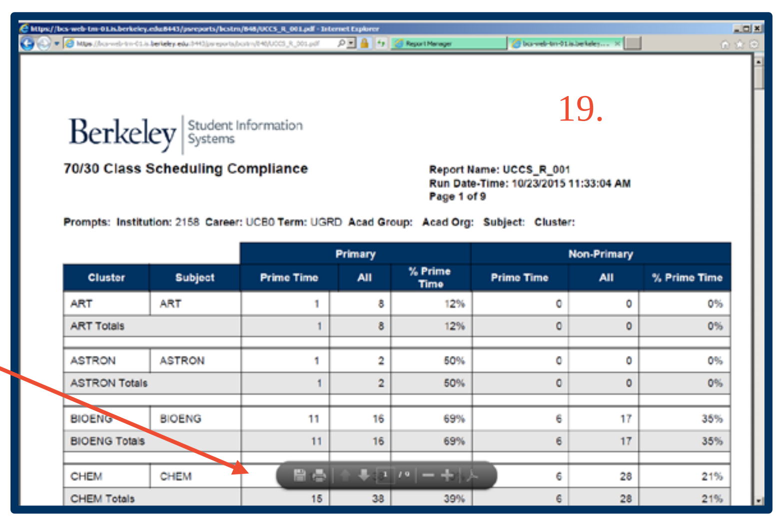


18. Click the PDF of the report, shown in the **Report List**. (It should be the top report displayed.)



19. 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.

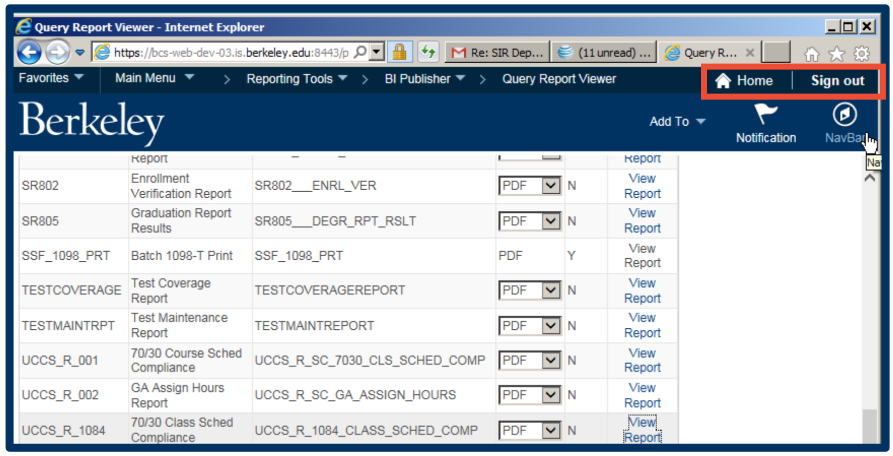


20. When done, close the report's broswer tab to exit the report.

20.

21.

21. Click **Home** to return to Campus Solutions' home page, or **Sign out** to exit Campus Solutions.



Support:

For questions or assistance, please contact SIS Production Support:

- Email: sishelp@berkeley.edu
- Call 510-664-9000 (press option 6)

For additional SIS resources, please visit:

- http://sis.berkeley.edu/training